

Report

65 Gresham Street  
London  
EC2V 7NQ

T: +44 (0)20 7911 2468  
F: +44 (0)20 7911 2560



# Greater Norwich: Employment Land Assessment

DECEMBER 2017



## Contents

1.	Introduction .....	1
2.	Current Supply Portfolio.....	4
3.	Strategic Site Clusters .....	47
4.	Base Economic Forecast .....	79
5.	Alternative Growth Scenario.....	85
6.	Employment Land Requirements.....	102
7.	Conclusions and Recommendations.....	104

## Appendices

- Appendix I    Assessment Matrix
- Appendix II    Site Assessment Forms
- Appendix III    Site Maps

Prepared By: Martyn Saunders, Richa Joshi & Zak Vallender  
Status: Final  
Draft Date: December 2017

**For and on behalf of GVA Grimley Limited**

# 1. Introduction

- 1.1 GVA have been commissioned to undertake a joint **Employment, Retail and Town Centre Study** on behalf of Norfolk County Council, Norwich City Council, Broadland District Council and South Norfolk Council which together form the Greater Norwich area.
- 1.2 The overall purpose of the study is to identify the future needs and opportunities for retail, office, industrial and warehousing floorspace across the three local authority areas. This report specifically focuses on identifying the future collective requirements in respect of employment needs which will need to be addressed through the Greater Norwich Local Plan. It provides the technical assessment of the future demand for and supply of employment land within the Greater Norwich area. It considers the scale and nature of future employment growth, the resultant requirements for new floorspace, how suitable the existing/identified sites are for meeting this need and any quantitative or qualitative need for additional land to be identified.
- 1.3 This report builds on the Baseline Report (GVA; Dec 2016) which established both current and recent changes within the Greater Norwich economy and commercial property market. This integrated assessment of the area has helped identify how the economy has been changing during and post-recession and what is likely to drive future opportunities for growth.
- 1.4 The key summary messages to emerge from the Baseline Report were:
- In line with benchmark areas, each of the authorities that compose Greater Norwich have diverse economies with significant employment in public sector activities, retail, and professional services;
  - Manufacturing is present in Greater Norwich, ranging from creating food products in Norwich to the manufacturing of vehicles and trailers in South Norfolk;
  - Each of the authority areas saw recessionary impact in terms of unemployment, GVA output loss, and business formation and survival rates;
  - Norwich and South Norfolk currently have GVA per capita outputs that are above the national average whereas Broadland falls behind;
  - Norwich outperforms Broadland and South Norfolk yet falls behind the national average with regard to employment in specialist ICT;
  - Research and Development activities at the Norwich Research Park provide a significant cluster of strength in life sciences, health, food and environmental sciences;

- Demand for property is characterised by small scale demand. The highest proportion of lettings of industrial space in Greater Norwich is for smaller units (below 465sqm). These units have higher rents and typically quick letting times, again suggesting high demand;
- There is a potential shortage of good quality industrial stock which may lead to the sub-region not meeting its growth potential if not addressed by new development;
- Across Greater Norwich, vacant and available industrial and office floor space has fallen over recent years; occupancy rates have risen.

1.5 The bullet points below set out a SWOT analysis for Greater Norwich based on socio-economic baseline and commercial property market review above.

## Strengths

- Norwich is a regional centre for East Anglia, with good connections to the wider region;
- Greater Norwich has a high containment rate of its workforce and attracts in-commuting, suggesting a healthy and interconnected local economy;
- There is a sizeable working age population in the urban centre of Norwich;
- High representation of students within the Norwich City Council area, providing a diverse skill base and underpinning a range of leisure and cultural activities;
- High levels of economic activity and GVA growth in Broadland and South Norfolk;
- Robust demand for office, industrial and retail units, reflecting the region's diverse economy;
- An established presence of high value sectors such as engineering, health and food technology;
- Completions of commercial units in Wymondham, such as on Farrier Close and Chestnut Drive, exemplify interest to invest outside the city core into the wider urban geography of Greater Norwich;

## Weaknesses

- An aging population in the more rural Broadland and South Norfolk authorities;
- Culture of entrepreneurship across the sub-region is not as strong as seen nationally, with low business birth rates per 1000 residents (although the Norwich City Council area performs well);
- Economic activity is low in Norwich (in part a result of high proportions of students in the population) and GVA output saw severe recessionary impact which has seen little recovery since.

- Loss of office in centres, particularly Norwich, which is partially captured by peripheral business parks.

## Opportunities

- Co-ordinated political impetus and strategy is set to support local growth sectors;
- Sectors such as food, health, logistics, Knowledge Intensive Business Services (KIBS) and technology are likely to show increasing demand for floorspace and sites in Greater Norwich;
- Norwich has a series of allocated/opportunity sites proximately located to existing sites to support expansion and sector specific growth alongside creating new commercial/industry locations;
- Greater Norwich is an attractive place to live and work, and has a strong talent pool that will unpin growth in high value sectors;
- Greater Norwich is seeing infrastructure development that is helping to unlock new sites in proximity to Norwich;
- Greater Norwich has strong and established connections between its centres and commercial locations, particularly those in proximity to Norwich such as Wymondham and Rackheath, which creates a cluster and drives growth to benefit Greater Norwich as a whole;
- Greater Norwich is well positioned to capitalise on international links, such as its Airport and proximate ports to the East which serve a large catchment;
- Greater Norwich has strong ties to cities such as Cambridge and London, and continues to build on these such as the tech corridor that is being established on the A11;
- Greater Norwich has one of the strongest food and health clusters in Europe and is creating capacity to support its growth.

## Threats

- The current economic and political climate may strain the local economy, particularly in terms of resource costs and access to talent;
- Risk of lower performance than neighbouring areas, such as Cambridge and Peterborough, with poor capture of office employment growth;
- Sub-optimal management of competition between employment locations which is complicated by local authority boundaries, particularly on the Norwich urban periphery, and risks hollowing the Norwich city centre;

## 2. Current Supply Portfolio

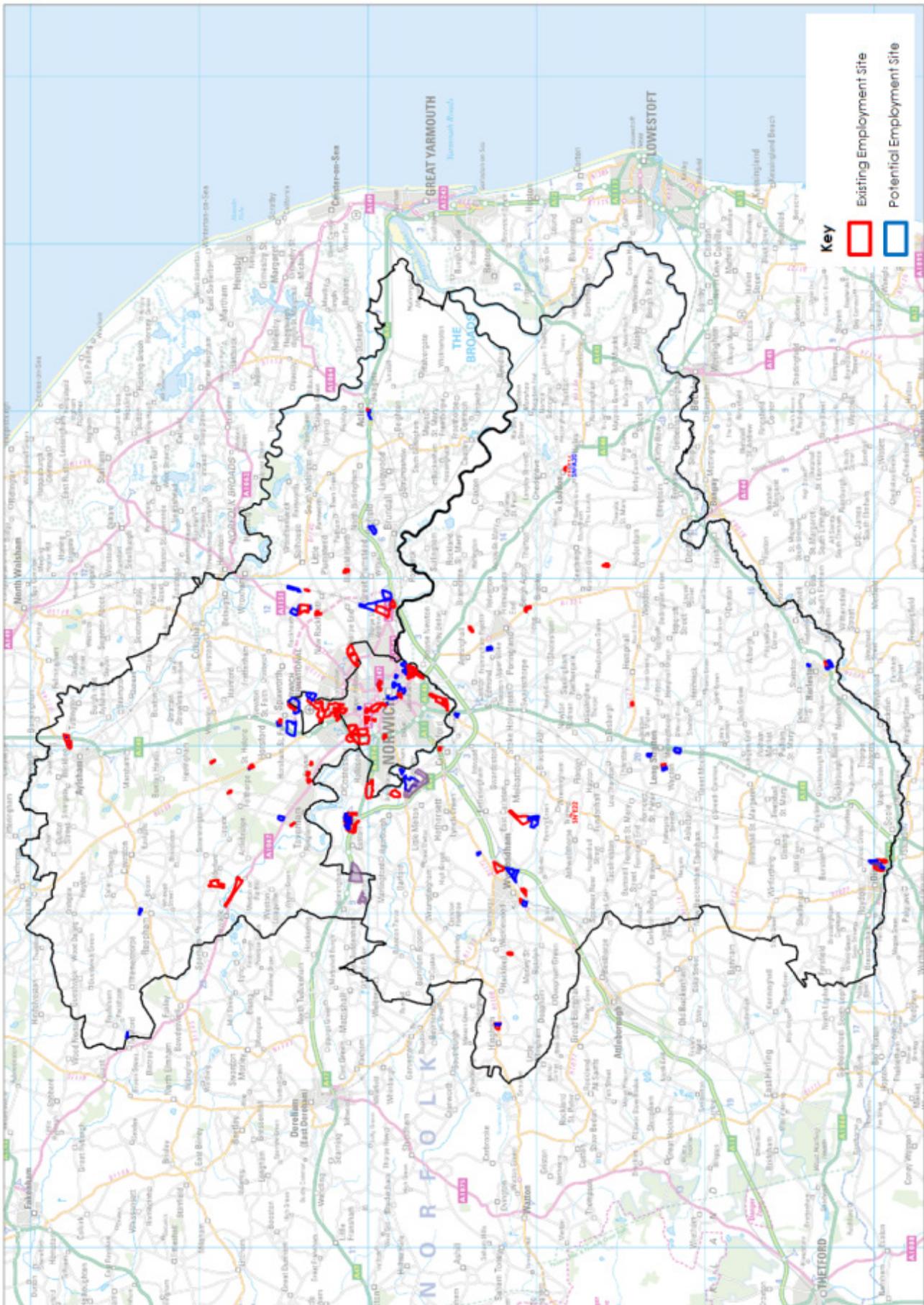
- 2.1 This chapter considers the supply of current employment sites across the Greater Norwich sub-region, contributed to by the supply from each of the three local authorities; Broadland, Norwich and South Norfolk.
- 2.2 The assessment of the supply portfolio is based on desk and site based survey of employment sites in each of the Greater Norwich authorities to identify the key characteristics of their site clusters.
- 2.3 Each authority provided GVA with a comprehensive list of their existing employment sites, drawn from information such as their Local Plan Sites Databases and existing policy allocations. GVA has reviewed these site lists and confirmed the sites included within this assessment with each authority. In line with NPPG guidance, analysis has focused only on sites that are greater than 0.25ha in scale.
- 2.4 Potential employment sites have also been identified from the lists provided by each authority, and are considered in the following Chapter. These sites include those which are not currently occupied; but which have been allocated for employment use, have planning permission for employment uses, have been previously assessed for employment use or have been put forward for employment use as part of Call for Sites processes.
- 2.5 In total 68 active employment sites (which are of at least 0.25ha) have been identified across the Greater Norwich sub-region. The total area of these active employment sites is 703ha, as shown below in Table 1.

Table 1: Total Employment Land Supply in Greater Norwich

	Total Number of Active Employment Sites	Total employment land (ha)	% of Greater Norwich employment land total
Broadland	22	203	29%
Norwich	23	282	40%
South Norfolk	23	218	31%
<b>Greater Norwich</b>	<b>68</b>	<b>703</b>	<b>100%</b>

- 2.6 The location of the active and potential employment sites assessed in this study is shown below in Figure 1.

Figure 1: Greater Norwich Overview Map: Existing and Potential Employment Sites



Map reproduced from Ordnance Survey material supplied by Norfolk County Council © Crown copyright and database rights 2017 Ordnance Survey 100019340. Use of this data is subject to terms and conditions

2.7 This Chapter considers the supply of current employment sites across the Greater Norwich sub-region, contributed to by the supply from each of the three Greater Norwich local authorities; Broadland, Norwich and South Norfolk.

## Site Assessment Approach

2.8 The site assessment approach undertaken in this Study has assessed the employment supply for each of the Greater Norwich authorities in turn. Whilst all identified sites are considered within the analysis, focus is placed particularly on the key employment sites within each authority in order to better understand their role and contribution to the local employment land portfolio as well as the strategic Greater Norwich employment portfolio.

2.9 The following approach was undertaken:

- Desk based site assessment
  - Geographic context and connectivity of sites to strategic road network
  - Analysis of Costar Focus availability data (including vacancy levels) and statutory designations i.e. habitat, landscape, flooding etc.
  - Categorisation of sites into sub-markets within each authority area
- On site assessment of key employment sites in each authority area with photographs taken.
- 'Traffic light categorisation' of sites in an Employment Site Assessment Matrix for each authority
- Categorisation of sites into groups advising on future action
- Review of strategic site clusters which constitute a key employment areas for the Greater Norwich sub-regional economy and its growth, particularly in the key growth sectors; life sciences and health, advanced manufacturing and engineering, professional and business services and digital cultural and creative industries.

## 'Traffic Light' Categorisation

2.10 The on-site aspects of the assessment process and the desk-based analysis of the data indicated above, allowed for sites to be considered based on a range of criteria, using a 'traffic light' system where red is considered a disadvantage for an employment site and green is considered an advantage. This is presented in the form of a site assessment matrix, which has been produced for each authority area.

- 
- 2.11 Table 2 shows how the specific details recorded for each site were categorised into red, amber and green for 12 key criteria. Three further criteria are considered within the table, but categorised out with the traffic light approach.
- 2.12 The traffic light categorisations for each site helped to assess their overall quality and identify the overall nature and characteristics of the identified sub-markets within each authority area. This categorisation has also been used to form the recommendations on future action for the employment sites.
- 2.13 It is important to note that in some cases the traffic light categorisations reflect the appropriateness and quality of sites for employment use 'on paper', but do not consider this in conjunction with their support and provision for current uses. Although a site may not be 'green' in the traffic light categorisation within the matrix, and may not be appropriate for employment uses should the current occupier(s) leave, or seem like the most desirable employment site in terms of quality, it may accommodate a locally important business within the area, or may provide the only appropriate site for certain uses. It would therefore demonstrate its value as an employment site despite not ranking well in all criteria within the Site Assessment Matrix – these factors are considered in more detail in the site assessment forms.
- 2.14 Similarly, not all occupiers require grade A space, in fact certain occupiers, such as certain bad neighbour uses, including car repairs, waste transfer and disposal sites etc., are more suited to lesser grade space, and would seek to occupy this quality of space which would not necessarily score highly in the Site Assessment Matrix.
- 2.15 The 'Adequate Access & Parking' criteria, is assessed both in terms of wider accessibility to the site (considering closest trunk road, rail access, bus routes and its location in the context of strategic routes within the authority area) and its immediate accessibility (considering the entrance and exit appropriateness).

Table 2: Traffic Light Categorisation of Sites (used in Site Assessment Matrix)

	Site Assessment Question	Categorisation	Categorisation	Categorisation
Location Character	Site Description: Location character	Mainly residential with few commercial uses	Mixed commercial and residential area	Well established commercial area
		Mainly residential or rural area with no other commercial uses		Established commercial area
Predominant Occupier Nature	Site Description: Nature/Significance of existing occupiers	I = International R = Regional N = National L = Local		
Building Age	Existing Conditions: Age of buildings	Pre 1940 - 1969	1970 - 1989	1990 -1999, 2000 - 2009 and 2010 onwards
Building Quality	Existing Conditions: Quality of buildings	Poor / Very Poor	Average Can also be used for mixed quality.	Very Good / Good
On-Site Amenities	Existing Conditions: On-site amenities	None evident	<b>Limited range</b> of: retail (convenience and comparison), restaurant/café, gym/sports, bank, hotel, creche, education and other	<b>Wide range</b> of: retail (convenience and comparison), restaurant/café, gym/sports, bank, hotel, creche, education and other
Proportion of non B Class Floorspace	Existing Conditions: Proportion of floorspace in non B class use	50-100% non B class	25-49% non B class	0-24% non B class
Neighbouring Amenities	Existing Conditions: Neighbouring amenities	No amenity services in close proximity	Close to one or two services	Close to a local centre with a reasonable service range/quantity
			Close to a limited range and quantity of basic services	Close to a town centre with a wide range and quantity of services
Environment Quality for Current Use	Existing Conditions: Quality of environment for current use	Very poor	Average	Good
		Poor		Very Good
Environment Appropriate for Current Use	Existing Conditions: Suitability of environment for current use	Unsuitable	Not unsuitable but requires improvement.	Suitable
Neighbouring Uses	Existing Conditions: Neighbouring uses	Residential, Retail, Leisure and Town Centre	Mix of red and green Or: Airport, Rail, Higher Education & Further Education	Road, Industrial, Office & Warehousing
Evidence of Pollutants	Existing Conditions: Evidence of pollutants	3 or more of the following: Noise, traffic, 24 hour operation, air, lighting	1 or 2 of the following: Noise, traffic, 24 hour operation, air, lighting	None evident
Adequate Access & Parking	Existing Conditions: Access & Parking ~ Car ~ HGV ~ Public Transport	Not adequate for the majority of the 5 aspects	Potential Issues with adequacy, but not to the extent of the red categorisation	Adequate for the majority of the 5 aspects

	Site Assessment Question	Categorisation	Categorisation	Categorisation
	~ Servicing			
	~ Parking			
<b>Internal Circulation</b>	Existing Conditions: Access & Parking ~ Internal Circulation	Poor	Average	Good
<b>Physical Opportunity for Intensification</b>	Development Context: Opportunity for intensification	Yes or No		
<b>Vacant Land</b>	Development Context: Vacant Land	Yes or No		
<b>Vacant Buildings</b>	Development Context: Vacant buildings (re-use and refurb)	Yes or No		

### Advising on Future Action

2.16 The following sections reviews the employment land supply in each of the local authorities which make up Greater Norwich. This takes into account both existing sites and proposed sites. As set out above, existing and proposed employment sites in each of the local authorities are reviewed in sub-market clusters which takes into account how economic geographies influence groups of sites, such as proximity to major transport corridors.

#### Protect and Maintain

This applies to sites which are suitable in their current form and are located in an appropriate location context where there is not likely to be significant long term change that affects their employment role or function. These sites should be protected. They will require some investment in stock and public realm to maintain their condition and quality over time, but should not require any significant investment or intervention beyond maintenance.

#### Protect and Enhance

This applies to sites which are largely suitable in their current form, but may require some support over time to reinforce their employment strength, or may be located in areas which are not entirely supportive or appropriate, or where there may be significant change in the medium to long term as a result of regeneration and redevelopment activity. Whilst sites are likely to be fine in the short to medium term (aside from requiring the maintenance of their condition and quality, as in the above category) and should be protected, it should be understood that these sites may evolve over time and may require support in achieving this.

#### Monitor and Manage

This applies to sites which are of poor quality and/or are not identified to be functioning adequately as employment sites, based particularly on poor stock condition and lack of

investment, non B class uses evident on site, location in areas with poor accessibility and amenity levels, and/or location in a context not supporting of employment activity. This categorisation is not intended to suggest a release from employment land designation or that the site does not meet the needs of occupiers. Instead it is intended to identify the weakest offer which may, over the long term, face challenges in terms of retaining existing or attracting new occupiers due to their limitations. The sites in this category should be kept under review over time and decisions on their future employment role be taken as and when they begin to experience significant vacancies, dilapidations etc. It may be that these sites are suitable for redevelopment as employment sites, or should accommodate a different type of employment activity, or that over time they could be de-allocated to accommodate other forms of growth. Each decision would need to be undertaken on a case by case basis.

## Analysis by District

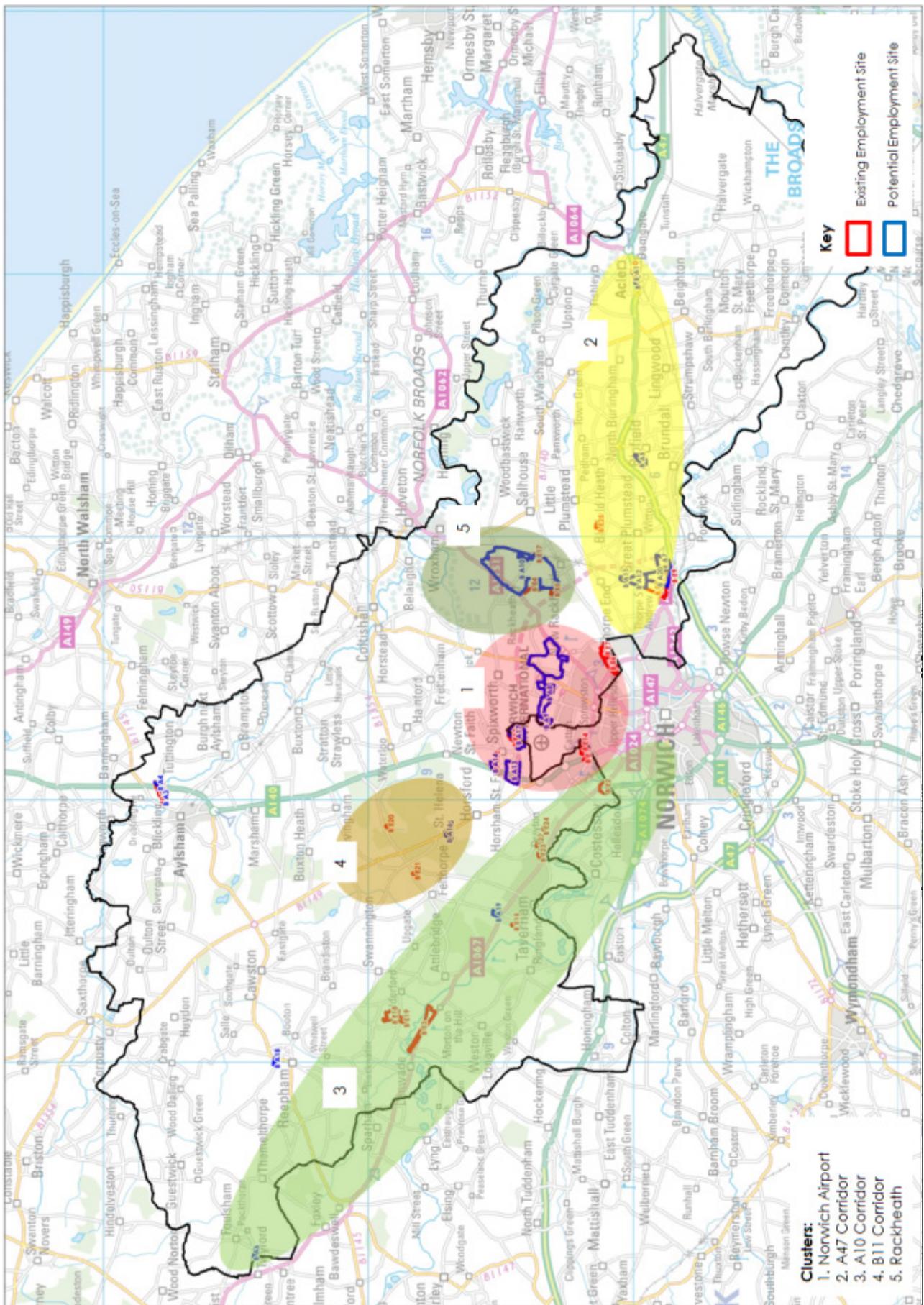
- 2.17 The sections below include tables for both existing sites and proposed sites within the sub-market clusters. Both provide brief profiles of each site and recommendations for how sites may be best utilised for the future in line with the categorisation above. The proposed site recommendations are bespoke and intend to provide detail on how each site might be best used, with recommendations not always proposing that employment use is the best option.
- 2.18 Existing site recommendations draw upon the three advice categories set out below which aims to draw on the same comparability that the traffic light system affords and to enable a element of standardised response. In effect, protect and maintain might best be understood as the 'green' option, reflecting the high quality of the site, and monitor and manage understood as the 'red' option, reflecting the poorer quality of the site. These tables are supplemented by the matrices in Appendix I, by commentary throughout the sections which provide further site context and also site survey forms which accompany this report.
- 2.19 Review of existing sites in each of the local authorities suggest that the majority of sites in Greater Norwich are of good quality and suit their existing uses. Sites that poorly suit continued employment uses are usually considered as such because of impact on neighbouring uses rather than the overall poor or dilapidated quality of the site. As such, much of the site and stock quality for existing sites is considered good or adequate, with green and yellow traffic light scores in accordance.
- 2.20 Following the analysis of each existing and proposed site, a further section considers sites which form 'strategic site clusters'. As stated, these clusters are well defined and constitute key employment areas within Greater Norwich that provide opportunities for key sectors which are expected to deliver future growth in the sub-region. The section supplements existing and proposed site assessments and provides a profile of the strategic site clusters which leads into

and underpins the geographic element of the sector review for the employment growth scenarios.

## Broadland Employment Supply

- 2.21 As shown below in Figure 2, the majority of employment sites in Broadland can be split into five sub-market clusters:
- A47 Corridor
  - A1067 Corridor
  - B1149 Corridor
  - Rackheath
- 2.22 This seeks to reflect key distinctions in employment activity and employment land provision based on the geographic clustering of sites. The Aylsham Industrial Estate is referred to separately as it is not located in proximity to other sites and therefore does not form part of a wider cluster. It is worth noting that, whilst shown on the map and included within the supply figures here, the cluster at Norwich Airport is considered separately later in this section as it straddles the Norwich/Broadland boundary.
- 2.23 There are twenty two active employment sites included within the assessment of Broadland's employment land supply, totalling 203ha of existing land. In addition, Broadland Council identifies thirteen potential employment sites within the local authority area, totalling 160 ha.
- 2.24 Sites that neighbour one another and share similar characteristics or overlapping uses are grouped when better understood as a single site and noted as such. Grouped sites may include a mix of existing and allocated sites. Full site assessment detail is provided in the Broadland Site Assessment Matrix in Appendix I.
- 2.25 As follows below, a review of the sites within each sub-market cluster is provided alongside the advised future action. This is supported by the provision of a table for each sub-market cluster which sets out key site characteristics, their building stock and site quality, and a brief note on future advice – this initial advice will be built upon in the final 'strategy' report' that follows on from this technical analysis. The tables provides a snapshot of each site and enable quick reference to the Broadland Site Assessment Matrix.
- 2.26 In addition to the tables for existing sites, tables are provided for proposed sites which set out key site characteristics and advice for the future use of these allocations. The advice is intended to support the prioritisation of development and draws upon policy documents where relevant to a site. Full site assessment details can be reviewed together with the existing sites in the Broadland Site Assessment Matrix.

Figure 2: Broadland Overview Map: Clusters of Existing and Potential Employment Sites



## A47 Corridor

- 2.27 The A47 Corridor cluster includes three existing employment sites totalling 105 ha. Each of the sites are different in character but are connected in their dependence on the A47 which leads east from Norwich. Existing and allocated sites at the Broadland Business Park (B E8) have been grouped for assessment because of subsequent development that has spilled over into these allocated sites and resulted in indistinct boundaries.
- 2.28 The B E8 site is a relatively new development which is both large and of high quality, benefitting from road infrastructure improvements that are also set to form the eastern end of the NDR. The site includes a mix of uses and has provided opportunities for large units and floor plates, attracting businesses such as Aviva. As such, the site includes a mix of non B class uses including large retailers and restaurants which include Makro and Brewers Fayre. The site is therefore a large employment centre with strong connections to the strategic highway and central Norwich in addition to large neighbouring allocated land to facilitate expansion. As one of the strongest strategic sites in Greater Norwich, the Broadland Business Park has been recommended for protection and maintenance and continued investment should be actively encouraged.
- 2.29 B E25, like B E8, is a relatively new site and, although smaller, appears to host a variety of occupiers. The site is located in a rural location but is still accessible, the site appears well occupied and, therefore, successful. Again it has been recommended for protection and maintenance. B E10 differs in that it is principally used as a trade counter and although an allocated lies adjacent, providing an opportunity for expansion, in its current form the site may not be suitable for subsequent B class use. The B E10 site has therefore been recommended to be monitored and managed and could potentially be released as a B class site (as it is unlikely to shift back from a quasi-retail use).

Table 3: A47 Corridor Existing Site Profiles

GVA Site Ref	Council Site Ref	Site	Site Area (ha)	Predominant Stock Quality	Overall Site Quality	Future Advice
B E8	TSA (a)	St Andrews Business Pk	99.6			<p><b>Protect &amp; Maintain</b></p> <p>Large, new, high quality development with expansion potential accommodating a range of new occupiers.</p>
B E10	BD001	Site 1	0.4			<p><b>Monitor &amp; Manage</b></p> <p>Site with principally trade counter use that has local value but may not be suited to subsequent B class use.</p>
B E25	-	Octogan Business Park	4.8			<p><b>Protect &amp; Maintain</b></p> <p>Relatively new site with a mix of occupiers that hold local value.</p>

2.30 The A47 Corridor cluster includes five proposed sites totalling 37 ha. The sites fall within three settlements along the A47, B A1 and B A2 in Acle, B A5 in Blofield, and B A7 and B A11 on the eastern fringe of Norwich next to the existing sites that form the Broadland Business Park.

2.31 The sites uses proposed are reflective of the areas that each of the sites lie proximate to. Table 6 shows that proposed sites in Acle, which lie adjacent to light industrial uses, are recommended for similar industrial uses and could accommodate expansion of the sector from neighbouring sites. Site B A5 in Blofield is bounded by residential uses but is larger than those in Acle and has good access to the A47 via the Yarmouth Road which would suit a range of industrial uses. Sites that border the Broadland Business Park are identified to accommodate expansion of the existing site and should aim to accommodate high quality B class uses. The Broadland Business Park and recommendations for the cluster are set out in the strategic site cluster section below.

Table 4: A47 Corridor Proposed Site Profiles

GVA Site Ref	Council Site Ref	Site	Site Area (ha)	Strategic Context	Future Sectors	Potential Opportunities
B A1	ACL2	Acle, South of Station Road	2.19	Potential to form a site extension to the existing B E10 site.	Mix of light industrial B class uses.	Located along the A47, the site has a good connectivity to the urban core. However, in terms of its use, the site use is likely to be more local in nature, potentially accommodating expansion of local business activities.
B A2	ACL3	Acle, Former Station Yard	0.99	Lies adjacent to the Acle train station with existing use on site.	Light industrial B class uses.	
B A5	BLO1	Blofield, South A47 north of Yarmouth Road	10.23	Site set between A47 and Yarmouth Road with potential to form urban extension with good site access.	Primarily B2 and B8 uses that make use of good access to strategic road network.	Site is bound by A47, the Yarmouth Road and residential development to the east and west; good location and accessibility; expansion of local needs and existing employment area.
B A7	GT10	Thorpe St Andrew, Broadland Gate	20.24	Potential to form extension to existing Broadland Business Park. (Permitted for mixed use development).	Mix of high quality B class uses that reflect the existing typography.	Adjacent to Broadland Business Park; good connectivity along A47; potential to accommodate expansion coming out of the Business Park; potential for Professional/Businesses and related supply-chain related ancillary uses.
B A11	GT9(a)	Thorpe St Andrew, Broadland Business Pk (north of Cranley Road)	2.92	Potential to form extension to existing Broadland	Mix of high quality B class uses that reflect the existing typography.	

## A1067 Corridor

- 2.32 The A1067 Corridor cluster includes six existing employment sites totalling 56 ha. The A1067 leads North West from Norwich and a series of existing and allocated sites lie in proximity. B E19 is considered together with B E18 given their proximity and connectedness in addition to their similar locality.
- 2.33 The majority of sites (B E3, B E18, B E22, B E23, and B E24) in the cluster are sizeable and accommodate a mix of B class uses which benefit from the connectivity to Norwich. Sites in Drayton are of a smaller scale than those further to the North yet they exhibit similar typologies and site quality. Given their value as industrial locations and suitability for a mix of B class uses, each of these sites have been recommended for protection and maintenance.
- 2.34 Site B E15 lies adjacent to multiple sports clubs and, rather than an industrial site, appears to have uses which either associate with or benefit from proximity to the adjacent uses. The site is small and shows little expansion potential yet the site is recommended for protection and maintenance based on its value in conjunction with the adjacent sites.

Table 5: A1067 Corridor Existing Site Profiles

GVA Site Ref	Council Site Ref	Site	Site Area (ha)	Predominant Stock Quality	Overall Site Quality	Future Advice
B E3	LEN (a)	Norwich Road Ind Est	25.3	Mixed		<b>Protect &amp; Maintain</b> Mature, large site with a mix of occupiers.
B E15	BD023	Beech Avenue	1.0			<b>Protect &amp; Maintain</b> Defined site with uses that relate to adjacent sport club sites.
B E18	BD019	Bernard Matthews	22.1	Mixed		<b>Protect &amp; Maintain</b> Mature site with a large occupier.
B E22	BD025	R.G. Carter	3.1	Mixed		<b>Protect &amp; Maintain</b> Mature site with a large occupier.
B E23	BD024	Drayton Industrial Estate	3.2	Mixed		<b>Protect &amp; Maintain</b> Mature site with a mix of occupiers.
B E24	BD026	Frost Industrial Estate	1.4	Mixed		<b>Protect &amp; Maintain</b> Mature site with a mix of occupiers.

- 2.35 The A1067 Corridor cluster includes two proposed employment sites totalling 6 ha. Both sites are located in relatively rural settings next to sites that have employment uses that have some

B2 and storage related uses. Both sites are therefore recommended for light industrial uses with the potential to accommodate expansion of the adjacent employment uses.

Table 6: A1067 Corridor Proposed Site Profiles

GVA Site Ref	Council Site Ref	Site	Site Area (ha)	Strategic Context	Future Sectors	Potential Opportunities
B A6	FOU2	Bintree Road Site	1.39	Lies in a rural setting adjacent to a Saddlery,	Light industrial B class uses with potential connection to adjacent site.	Relatively small sites along the A10; potential for B2/ B8 related uses.
B A19	TAV1	Taverham, Fir Covert Road	5.95	Lies adjacent to a retail area dominated by a garden centre.	B2 or B8 with potential for connection to the adjacent site.	

## B1149

2.36 The B1149 Corridor cluster includes three existing employment sites totalling 9 ha. The B1149 Corridor Cluster is characterised by sites that fall within rural settlements. Each of the sites are relatively small but accommodates a mix of B class uses that appear to hold predominantly local value.

2.37 Whereas the Woodland Park Industrial Estate (B E20) and the Felthorpe site (B E21) are fairly well defined with little space for expansion, the Holt Road site (B E16) includes vacant land and two adjacent sites that provide growth opportunity. However, given existing uses, their localised value and their little growth potential, this suggests that the B E16, as well as B E20 and B E21, are unlikely to require developing allocated or additional space. These sites however are well defined and utilised, and are therefore recommended for protection and maintenance.

Table 7: B1149 Corridor Existing Site Profiles

GVA Site Ref	Council Site Ref	Site	Site Area (ha)	Predominant Stock Quality	Overall Site Quality	Future Advice
B E16	BD029	Holt Road	5.2	Mixed		<b>Protect &amp; Enhance</b> Mature site with expansion potential.
B E20	BD028	Woodland Park Ind. Estate	1.7			<b>Protect &amp; Maintain</b> Mature site with a mix of occupiers.

## Rackheath

- 2.38 The Rackheath Cluster includes three existing employment sites totalling 27 ha. The three sites cluster to the North of New Rackheath, in proximity to Norwich, and, while accommodating a mix of occupiers, each site is distinct.
- 2.39 The Rackheath Industrial Estate (B E4) is a sizeable site that is set amongst agricultural land and well defined as such. A row of residential sites on Green Lane form part of the western border which are dwarfed by the scale of the site. The site includes a mix of scales and B class uses, accommodating a series of large industrial units. Occupiers include B A systems, reflecting the markets that some businesses serve. The site is high value and will continue to be useful as a predominantly B Class use site and is therefore recommended for protection and maintenance.
- 2.40 The Mahoney Green site (B E5) is located to the South of Rackheath Industrial Estate and is much smaller, comprising several office buildings and an industrial unit to the rear. The site is recommended for protection and maintenance due to its high quality and mix of occupiers that hold local value. The Wood Green industrial estate lies in proximity to the Salhouse railway station and as such has good access by road and rail into Norwich. The site is however of relatively low quality and the predominant occupier is a brewery making use of the dated industrial units. This site may not be suitable for subsequent occupiers of different B class uses and is therefore recommended for monitoring and managing to review ongoing B class utility.

Table 8: Rackheath Existing Site Profiles

GVA Site Ref	Council Site Ref	Site	Site Area (ha)	Stock Quality	Site Quality	Future Advice
B E4	RAC (a)	Rackheath Ind Est	22.0	Mixed		<b>Protect &amp; Maintain</b> Mature site with a mix of occupiers.
B E5	RAC (b)	Mahoney Green	4.1	Mixed		<b>Protect &amp; Maintain</b> High quality office site with mix of occupiers.
B E17	BD037	Wood Green Industrial Estate	1.2	Mixed		<b>Monitor &amp; Manage</b> Site adjacent to railway with a collection of dated buildings.

- 2.41 The Rackheath cluster includes a single proposed site that totals 23 ha. The site has been identified for development as part of the North Rackheath masterplan and is expected to accommodate a mix of uses with potential for B-class as extension of the existing employment sites that border B A10. Rackheath and the potential for the area is discussed in detail in the strategic site clusters section below.

Table 9: Rackheath Proposed Site Profile

GVA Site Ref	Council Site Ref	Site	Site Area (ha)	Strategic Context	Future Sectors	Potential Opportunities
B A10	GT16	Rackheath, North Rackheath	23.24	Forms part of the Rackheath Masterplan that accommodates for expansion of the existing employment sites. Supporting a mix use extension.	B1 class, extension to Rackheath Industrial Estate can be B2 and B8.	Site is allocated for development in the Growth Triangle Area Action Plan and North Rackheath masterplan and as such is recommended for mixed- B class use; potential to accommodate local needs, mixed retail and commercial services.

### Aylsham Industrial Estate

2.42 The Aylsham Industrial Estate stands alone to the north of Broadland and does not fall into a cluster. The industrial estate is considered alongside the B A3 and B A4, which form small but natural extension to the existing site that together total 21 ha.

2.43 The site lies to the northwest of Aylsham and is well connected to the strategic road network via the A140 that leads south to Norwich. The site (in its context) is large and includes a mix of B class uses. The site is therefore recommended for protection and maintenance, and neighbouring allocated should be considered for development potential.

Table 10: Aylsham Industrial Estate Existing Site Profile

GVA Site Ref	Council Site Ref	Site	Site Area (ha)	Stock Quality	Site Quality	Future Advice
B E11	BD004	Aylsham Ind Estate	21.5	Mixed		<b>Protect &amp; Maintain</b> Site with mix of occupiers and expansion opportunity.

2.44 The Aylsham Industrial Estate cluster includes two proposed sites totalling 4 ha. As noted above, these sites have been considered alongside the existing B E11 site because of their location within the wider site and because of overspill of development. The sites are recommended for mixed B class use and B A4 has been divided into plots and is currently marketed with a builders merchants already established. The Aylsham industrial estate and its potential are discussed in detail in the strategic site clusters section below.

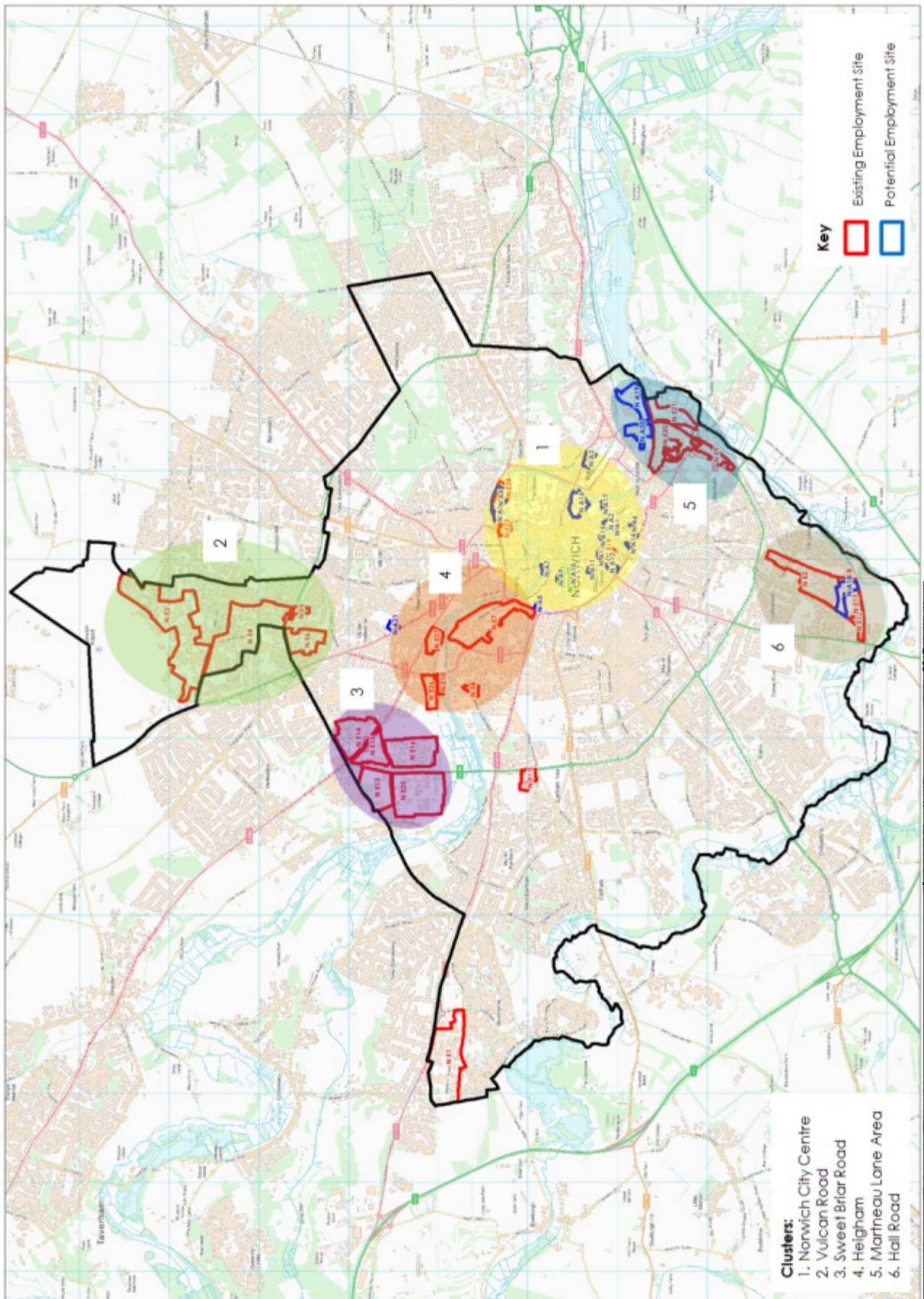
Table 11: Aylsham Industrial Estate Proposed Site Profile

GVA Site Ref	Council Site Ref	Site	Site Area (ha)	Strategic Context	Future Sectors	Potential Opportunities
BA3 and BA4		Dunkirk industrial Estate	3.6ha	Part of an existing industrial estate – site B A4 is to the east on the A140 and B A3 is to the west.	BA 4, due to proximity to A140, can lend itself to mixed industrial B class use with ancillary offices. B A3 could support more heavy industrial uses.	Two sites located along A140, the site is adjacent to Aylsham Business Park. The site to the east, along the A140 is good access and potentially an opportunity for mixed B class use.

## Norwich Employment Supply

- 2.45 As shown below in Figure 3, the majority of employment sites in Norwich can be split into six sub-market clusters:
- Norwich City Centre
  - Vulcan Road
  - Sweet Briar Road
  - Heigham
  - Martneau Lane Area
  - Hall Road
- 2.46 This seeks to reflect key distinctions in employment activity and employment land provision based on the geographic clustering of sites, drawing on the property market analysis presented in the baseline report. The Bowthorpe Employment Area and Guardian Road sites are referred to separately as they are not located in proximity to other sites and therefore neither form part of a wider cluster. It is worth noting that, whilst shown on the map and included within the supply figures here, the cluster at Norwich Airport is considered separately later in this section as it straddles the Norwich/Broadland boundary.
- 2.47 There are twenty three active employment sites included within the assessment of Norwich's employment land supply, totalling 282 ha of existing land. In addition, Norwich City Council identifies twelve potential employment sites within the local authority area, totalling 22 ha.
- 2.48 Sites that neighbour one another and share similar characteristics or overlapping uses are grouped when better understood as a single site and noted as such. Grouped sites may include a mix of existing and allocated sites. Full site assessment detail is provided in the Norwich Site Assessment Matrix in Appendix I.
- 2.49 As follows below, a review of the sites within each sub-market cluster is provided alongside the advised future action. This is supported by the provision of a table for each sub-market cluster which sets out key site characteristics, their building stock and site quality, and a brief note on future advice. The tables provides a snapshot of each site and enable quick reference to the Norwich Site Assessment Matrix.
- 2.50 In addition to the tables for existing sites, tables are provided for proposed sites which set out key site characteristics and advice for the future use of these allocations. The advice is intended to support the prioritisation of development and draws upon policy documents where relevant to a site. Full site assessment details can be reviewed together with the existing sites in the Norwich Site Assessment Matrix.

Figure 3: Norwich Overview Map: Clusters of Existing and Potential Employment Sites



### Norwich City Centre

- 2.51 The Norwich City Centre Cluster includes three existing employment sites and two mixed use sites totalling 16 ha. These sites accommodate a mix of uses and reflect their city centre character with a varying building age and quality. Given the strategic city centre location and good road access, each of the sites are particularly suited to continued B class use. N E19 is considered alongside N A12 and N A13 and N E22 is considered alongside N E24, N A4 and N A5 as single sites given their shared characteristics, blurred borders, and continuity across sites.
- 2.52 Site N E19 includes a building occupied by Aviva, the Marble Hall and office spaces set above ground floor retail set in a ‘high street’ environment. The site is well located in proximity to a range of amenities, the offices appear to be dated but of reasonable quality in terms of appearance. The site is therefore recommended for protection and maintenance, and continued office use should be encouraged, however it is recognised that the office space (in its current form) may not meet future needs and the site’s employment role may be as part of a more mixed use development.
- 2.53 Site NE22 lies adjacent to Site N E23, both lying either side of Whitefriars. Site N E22 includes a mix of large office buildings with a large amount of allocated space in the centre that was previously used for car parking. The site is well connected to the strategic highway with direct access to the A147. Site N E23 shares similar characteristics but has no vacant land and appears to be occupied by a large single industrial building. Given the value of both sites and their connectivity, both are recommended for protection and maintenance, and continued development of a similar nature is recommended for Site N E22.
- 2.54 Sites N MU1 and N MU2 have mixed use designations which reflect the variety of occupiers that include restaurants, offices, a car park, a place of worship, a school, a police station and the council offices. Buildings on both sites are of typically high quality and some have historic character which benefit overall amenity. Given the character of the area and the value of these uses, both sites are recommended for protection and maintenance.

Table 12: Norwich City Centre Existing Site Profiles

GVA Site Ref	Council Site Ref	Site	Site Area (ha)	Stock Quality	Site Quality	Future Advice
N E19	-	Surrey Street	3.44			<b>Protect &amp; Maintain</b> Mature town centre location with mix of valuable office space.
N E22	NC021	Gilders Way	8.58	Mixed	Mixed	<b>Protect &amp; Enhance</b> Large site with a mix of high value occupiers and large development opportunity.

GVA Site Ref	Council Site Ref	Site	Site Area (ha)	Stock Quality	Site Quality	Future Advice
N E23	NC023	Blackfriars Street	1.42			<b>Protect &amp; Maintain</b> Mature site with large occupier.
N MU1	266	St Giles/ Pottergate	1.11			<b>Protect &amp; Maintain</b> Mature site with a range of occupiers.
N MU2	267	City Hall/St Giles	1.93			<b>Protect &amp; Maintain</b> Mature site with a range of occupiers.

2.55 The Norwich City Centre cluster includes nine proposed sites totalling 9ha. The sites reviewed in Table 15 includes a collection of car parking sites and three large standalone sites. Sites N A12 and N A13 are of interest when considered in conjunction with N E19 above.

2.56 The identified car parking sites are all relatively small and have been recommended for B1 and potentially B2 class use dependent on car parking need. Demand for car parking space in Norwich is high and the likelihood that these sites will become available for employment use is low. N A2 is a vehicle repair and car park site that, although in principle could accommodate other B-class use, is unlikely to become available in the short term because of high demand for the existing use. N A3 forms a Post Office mail depot that could accommodate a mix of B-class uses. N A16 is a large site which includes a mix of car park sites, vacant sites and existing employment uses that could accommodate a mix of B1 and B2 class uses.

Table 13: Norwich City Centre Proposed Site Profiles

GVA Site Ref	Council Site Ref	Site	Site Area (ha)	Strategic Context	Future Sectors	Future Potential
N A7, N A8, N A10, N A11, N A14, N A17	CC21, CC22, CC24, CC25, CC29, CC7	Collection of Car Park Sites	2.8	Sites with principally car parking uses that could be considered for alternative B class uses.	The central location and relatively small footprints of most of these sites suggests potential for sectors which occupy B1 and B2 class uses.	Each site is principally occupied by car parking space. Dependent on the need to be retained for parking, each site is provisionally recommended for B class use with some mixed use development.
N A2	CC10	Mancroft, Land at Garden Street	1.08	Central site with automotive repair uses and an adjoining carpark.	Expect existing uses to be retained. Alternatively, opportunities for sectors occupying B1 and B2 class uses.	Small scale offices/ business units in mixed-use environment.
N A3	CC15	Thorpe Hamlet,	1.5	Current forms a post office mail depot	Expect existing use to be retained.	Site allocated to deliver mixed-se

GVA Site Ref	Council Site Ref	Site	Site Area (ha)	Strategic Context	Future Sectors	Future Potential
		Norwich Mail Centre 13 - 17 Thorpe Road		with a large amount of parking use.	Given relatively large site area for a central location – opportunity for sectors that occupy B1, B2 and B8 uses.	residential development
N A16	CC4	Thorpe Hamlet, Land at Rose Lane and Mountergate	4.08	Large site with a significant amount of land used for car parking. With the recent delivery of the Rose Lane multi-storey car park the planned provision of further park and rides, there may be scope for b-class development.	Existing buildings likely to be retained but there may be opportunity for b-class uses on car parking sites. These would likely cater to sectors which tend to occupy B1 and B2 class use buildings.	Identified for mixed-use redevelopment with main focus on office development

## Vulcan Road

2.57 The Vulcan Road Cluster includes two existing employment sites totalling 96 ha. These sites are some of the largest in Norwich, accommodating a mix of B class uses and much of Norwich's industrial floorspace. Each site is well connected to the strategic road network and the location of Norwich Airport to the north has afforded some local specialism in aviation related industries. Site N E4 is considered alongside N E5 and N E6 as a result of their shared characteristics and blurred boundaries with continuous industrial urban form.

2.58 Both sites have a range of high value occupiers and provide a large amount of employment opportunities. Both sites are therefore recommended for protection and maintenance, and continued B class use investment should be encouraged.

Table 14: Vulcan Road Existing Site Profiles

GVA Site Ref	Council Site Ref	Site	Site Area (ha)	Stock Quality	Site Quality	Future Advice
N E3	DM16 (c)	Airport Industrial Estate	47.77	Mixed		<b>Protect &amp; Maintain</b> Large, mature site with a range of high value occupiers.
N E4	DM16 (d)	Vulcan Road/Fifers Lane Industrial Estate	48.46	Mixed		<b>Protect &amp; Maintain</b> Large, mature site with a range of high value occupiers.

## Sweet Briar Road

- 2.59 The Sweet Briar Road Cluster includes five existing employment sites totalling 79 ha. These sites accommodate a mix of B class uses and comprise one of the largest collections of these uses in Norwich. The stock across each of the sites is mixed and there is scope to encourage improvement of some of the more dated and low quality units. There is also evidence of retail and trade counter uses evident in this cluster alongside its B class uses.
- 2.60 Each of the sites have good accessibility and are well connected to the strategic road network. The chemical production use in site N E25 is of lower quality but suitable for its operation. Each of the sites are recommended for protection and maintenance given their value and the employment opportunities they afford. Continued development is encouraged on site N E13 which has seen extension from the chemical manufacturing site to the south.

Table 15: Sweet Briar Road Existing Site Profiles

GVA Site Ref	Council Site Ref	Site	Site Area (ha)	Stock Quality	Site Quality	Future Advice
N E13	DM16 (n)	Briar Chemicals, Sweet Briar Road (north site)	13.67			<b>Protect &amp; Enhance</b> Site partially occupied as a chemical production site.
N E14	DM16 (o)	Whiffler Road Industrial Estate	14.12	Mixed		<b>Protect &amp; Maintain</b> Mature site with a mix of occupiers.
N E15	DM16 (p)	Sweet Briar Road Industrial Estate (2)	8.09	Mixed		<b>Protect &amp; Maintain</b> Mature site with a mix of occupiers.
N E16	DM16 (q)	Sweet Briar Road Industrial Estate (1)	16.93	Mixed		<b>Protect &amp; Maintain</b> Mature site with a range of occupiers.
N E25	NC022	Briar Chemicals, Sweet Briar Road (south site)	26.60			<b>Protect &amp; Maintain</b> Large, mature site occupied for chemical manufacturing.

## Heigham

- 2.61 The Heigham Cluster includes four existing employment sites totalling 32 ha. These sites accommodate a mix of B class uses and are more varied in their scale and character than in other clusters in Norwich. N E10 is considered alongside N E26 as a result of their shared characteristics and the sites being bisected by a pathway (Marriots Way).
- 2.62 Each of these sites are mixed in their quality and age, and are set more amongst residential uses, forming less of a defined commercial area than is evident in other clusters. Similar to

other clusters, there is evidence of retail and trade counter uses on these sites in addition to B classes. The sites are fairly well connected and the largest site, N E7, has a dedicated roundabout access from the Barn Road/ St Crispins Road dual carriage way.

- 2.63 Site N E10 is dated and requires upgrading yet each are recommended for protection and maintenance given the value of their occupiers and the mix that some of the smaller sites provide for Norwich as a whole.

Table 16: Heigham Existing Site Profiles

GVA Site Ref	Council Site Ref	Site	Site Area (ha)	Stock Quality	Site Quality	Future Advice
N E7	DM16 (g)	City Trading Estate	20.65	Mixed		<b>Protect &amp; Maintain</b> Large, mature site with a mix of occupiers.
N E8	DM16 (h)	Land west of Northumberland Street	1.35	Mixed		<b>Protect &amp; Maintain</b> Mature site with a mix of occupiers.
N E10	DM16 (j)	Drayton Road/Mile Cross Road (2)	6.01	Mixed		<b>Protect &amp; Enhance</b> Dated stock but accommodates a mix of occupiers.
N E27	NC015	Havers Road	3.92	Mixed		<b>Protect &amp; Maintain</b> Mature site with a mix of occupiers.

- 2.64 The Heigham cluster includes a single proposed site with a site area of 1 ha. The site currently accommodates retail alongside some storage use. As Table 19 identifies, the existing uses, access and site layout would suit B1 and B2 class use. This could be accommodated as buildings on the site are redeveloped and upgraded.

Table 17: Heigham Proposed Site Profile

GVA Site Ref	Council Site Ref	Site	Site Area (ha)	Strategic Context	Future Sectors	Future Potential
N A21	R22	Catton Grove, 165-187 Aylsham Road	0.86	Site accommodates comparison retail and what appears to be open storage of cars. There is clear potential for the site to accommodate b class use and for potential intensification.	Site is likely to accommodate b-class uses in buildings that reflect the existing topography. As such, future sectors are likely to be those that occupy B1 and B2 use buildings.	Potential to replace existing light industrial stock to a more modern commercial area.

## Martneau Lane Area

- 2.65 The Martneau Lane Area Cluster includes three existing employment sites totalling 27 ha. The sites include a mix of B class uses and accommodate some of the largest manufacturing units in Norwich. The quality and age of units on sites N E9 and N E20 are mixed yet N E20 is of slightly higher quality. Site N E21 is largely vacant and provides a strong development opportunity within the Norwich authority boundary. Site N E21, referred to as The Deal Ground in the Joint Core Strategy, is predominantly designated for residential use and will require significant works to improve access to the site with bridges over the River Yare to unlock its potential.
- 2.66 Each of the sites are well connected to the strategic road network via the A147 and lie relatively proximate to the Norwich railway station. Although site N E9 has predominantly trade counter and open storage uses, it will continue to be suitable for B class uses and, alongside the other sites, is recommended for protection and maintenance.

Table 18: Martneau Lane Area Existing Site Profiles

GVA Site Ref	Council Site Ref	Site	Site Area (ha)	Stock Quality	Site Quality	Future Advice
N E9	DM16 (i)	Europa Way, Bracondale	3.90	Mixed		<b>Protect &amp; Enhance</b> Sizeable site with a mix of occupiers.
N E20	NC020	Abbey Conference Centre Site	14.41	Mixed		<b>Protect &amp; Maintain</b> Sizeable, mature site with a mix of high value occupiers.
N E21	NC024	River Yare Site	8.44			<b>Monitor &amp; Manage</b> Sizeable, mostly vacant site – employment likely to form a component of larger mix.

- 2.67 The Martneau Lane Area cluster includes two proposed sites totalling 11ha. The sites lie adjacent to one another towards the north of the cluster and are defined by the rail lines that border them. N A19 is a largely vacant site with some historic industrial use that could reasonably accommodate a range of B class uses although the site has restricted access from a residential road. N A20 can reasonably accommodate a mix of B-class uses but currently has a single occupier that appears to make good use of the site.

Table 19: Martneau Lane Area Proposed Site Profiles

GVA Site Ref	Council Site Ref	Site	Site Area (ha)	Strategic Context	Future Sectors	Future Potential
N A19	R10	Thorpe Hamlet,	6.92	The site appears to have an historic	The site is relatively large and could	Sites to have historic B class uses linked to

GVA Site Ref	Council Site Ref	Site	Site Area (ha)	Strategic Context	Future Sectors	Future Potential
		Utilities Site, Cremorne Lane		industrial use that had strong ties to the rail network. The site now has some park use but is underutilised and could reasonably accommodate a range of development and uses.	accommodate sectors which occupy B1, B2 and B8 uses.	the adjacent site and railway line. Potential contamination; identified for mixed-use regeneration
N A20	R11	Thorpe Hamlet, Kerrison Road / Hardy Road, Gothic Works	4.64	Site is occupied by one business (A T B Laurence Scott) that serves a national market and is relatively high value. Yet there may be future potential to development the site given that building are dated.	The site is relatively large and could accommodate sectors which occupy B1, B2 and B8 uses.	Mixed—use development; opportunity for smaller-light industrial uses

### Hall Road

2.68 The Hall Road Cluster includes one existing employment site totalling 31 ha. The site, N E2, is considered alongside N E12, N E17, N E18, and N E19 as a single site given their similar character and uses, and blurred boundaries as a result of their continuous urban form bound by the Hall Road and railway line. The site comprises a mix of B class uses with a mix of build quality and age. There is also retail and trade counter uses evident in this cluster alongside its B class uses.

2.69 The site has strategic access to the Ipswich Road and A146 which both connect to the A47 trunk road which passes Norwich to the south. The site also includes some vacant land that can accommodate expansion and which should be endorsed for B class rather than retail or trade counter use. Given the scale of the site, the employment opportunities that it affords, and the potential for expansion, N E2 is recommended for protection and maintenance.

Table 20: Hall Road Existing Site Profile

GVA Site Ref	Council Site Ref	Site	Site Area (ha)	Stock Quality	Site Quality	Future Advice
N E2	DM16 (b)	Hall Road/Bessemer Road (1)	31.04	Mixed		<b>Protect &amp; Maintain</b> Large, mature site with a mix of occupiers.

## Bowthorpe Employment Area and Guardian Road

- 2.70 The Bowthorpe Employment Area, site N E1, and Guardian Road, site N E11, are both standalone in that they are not located in proximity to other sites and therefore do not form part of a wider cluster.
- 2.71 Site N E1 is large and accommodates a mix of B class uses with varying build age and quality. Uses to the west of the site appear to be higher value and include food manufacturing/ packaging and data centre uses whereas more retail and amenity uses are located to the east. The site is well connected via the Dereham Road which provides direct access into Norwich and lies in proximity to an A47 junction at Longwater. Given the value of the B class uses and its strong connectivity, the site is recommended for protection and maintenance.
- 2.72 Site N E11 accommodates a mix of uses and units, with vary age and quality. Occupiers include a storage and distribution business, fire and rescue services, a food bank, a business centre comprising offices, and several retail uses. The site sits within a largely residential location but has relatively good road connections with access to Dereham Road which leads into central Norwich. Given the value of existing uses on the site, particularly those that cater for the locality, N E11 is recommended for protection and maintenance.

Table 21: Bowthorpe Employment Area and Guardian Road Existing Site Profiles

GVA Site Ref	Council Site Ref	Site	Site Area (ha)	Stock Quality	Site Quality	Future Advice
N E1	DM16 (a)	Bowthorpe Employment Area	30.87	Mixed		<b>Protect &amp; Maintain</b> Large, mature site with a mix of high value occupiers.
N E11	DM16 (l)	Guardian Road	2.90	Mixed		<b>Protect &amp; Maintain</b> Mature site with a mix of high value occupiers.

## Norwich Airport

- 2.73 The cluster of employment activity around Norwich Airport straddles the administrative boundary of Norwich City Council and Broadland District Council, forming a key economic hub within the Norwich urban area. The Airport itself and the majority of business floorspace provided in the cluster lie within Norwich City Council's boundary, however much of the capacity for future growth lies within Broadland. Given this particular administrative characteristic, which is of limited relevance to the day to day functioning of the sites or market demand, we consider this cluster outside of the district specific analysis.
- 2.74 The Norwich Airport cluster includes six existing employment sites totalling 63 ha. Each accommodates a mix of B class uses, the sites straddle the Norwich City and Broadland boundary and form part of the Norwich city urban area. However, sites B E12 and B E13 lie the opposite side of the airport and diverge in character to other, larger and more diverse, sites in the cluster that clearly form part of the Norwich city continuous urban form.
- 2.75 Sites B E2, B E6, B E7, and B E14 are indistinguishable from the Norwich urban form and each are well connected to the A140/ A1042 that comprise the northern section of the Norwich outer ring road. Given their good connectivity and proximity to central Norwich, these sites include, in addition to B-class uses, occupiers such as specialised food related businesses, large retail, restaurants, and trade counters. Given the mature character and value as employment sites for Norwich city and the Greater Norwich Area, these sites have been recommended for protection and maintenance to retain 'fit for purpose' employment capacity within the area.
- 2.76 Sites B E12 and B E13 are less connected to the Norwich urban form yet this this will change with the delivery of the Northern Distributor Road (NDR) which will pass each of the sites. Unlike the more central sites in the cluster, both have growth potential and cases for expansion will improve with access to the NDR. Given how these sites are likely to see increasing interest with the delivery of the NDR, these sites have also been recommended for protection and maintenance and in the medium term should form a key part of the area's offer to attract new businesses and sectors.

Table 22: Norwich Airport Existing Site Profiles

GVA Site Ref	Council Site Ref	Site	Site Area (ha)	Stock Quality	Site Quality	Future Advice
B E2	HEL (b)	Park Road Industrial Estate	13.5	Mixed		<b>Protect &amp; Maintain</b> Mature, well located site with a mix of occupiers.
B E6	SPR (a)	Roundtree Way	19.6	Mixed		<b>Protect &amp; Maintain</b> Mature, well located site with a mix of occupiers.

GVA Site Ref	Council Site Ref	Site	Site Area (ha)	Stock Quality	Site Quality	Future Advice
B E7	SPR (b)	Pinetrees Road	15.8	Mixed		<b>Protect &amp; Maintain</b> Mature site with mix of occupiers and development opportunity.
B E12	BD009	Abbey Farm Commercial Park	2.6			<b>Protect &amp; Maintain</b> Established site with mix of occupiers and potential expansion opportunity.
B E13	BD030	Training Centre	3.0			<b>Protect &amp; Enhance</b> Mature, well located site that may require new occupiers – completion of NDR will assist attracting occupiers.
B E14	BD032	Vulcan Road	8.8	Mixed		<b>Protect &amp; Maintain</b> Mature, well located site with a mix of occupiers.

2.77 The Norwich Airport cluster includes four proposed sites totalling 90 ha. Site B A9 lies to the east of the airport and sites B A13, B A14, and B A17 lie to the north. Three of the sites border existing sites, B A9 to the east of N E3, B A14 to the east of B E12 and B A17 to the west of B E13.

2.78 Each of the sites have potential for B2 and B8 class uses given existing uses in the area and development to the north of the airport is supported with the earlier Aeropark proposal. The delivery of the NDR will aid to unlock much of the potential for these sites and enable the capturing of demand that has resulting in low vacancy rates to the south of the airport. As set out in Table 4 below, each of the sites are therefore recommended for B class use development. Opportunities around the Norwich Airport are discussed in further detail in the strategic site cluster section below.

Table 23: Norwich Airport Proposed Site Profiles

GVA Site Ref	Council Site Ref	Site	Site Area (ha)	Strategic Context	Future Sectors	Potential Opportunities
B A9	GT15	Site adjacent to St Faith's Road	14.77	Potential to form eastern extension to the existing Airport Industrial Estate.	Mix of B class uses, particularly B2 and B8, that reflect existing uses to the east of the Airport Industrial Estate.	The sites lie to the north of the existing Airport industrial cluster, having good proximity to A140 and NDR. Proximity to the Airport and the industrial cluster naturally lends to certain sector specific uses that are located in the area.
B A13	HNF2	Horsham St Faith, North of Norwich Airport	35.97	NDR delivery will unlock the site with potential to capture excess demand on the Airport Industrial Estate.	Mix of B class uses, particularly B2 and B8, that will make use of the connectivity afforded by the delivery of the NDR.	
B A14	HNG3	Horsham St Faith, Abbey Farm Commercial	2.83	Potential to accommodate expansion of the B E12 site which will be supported by	Light industrial uses that reflect the existing B E12 site.	

GVA Site Ref	Council Site Ref	Site	Site Area (ha)	Strategic Context	Future Sectors	Potential Opportunities
		al		the delivery of the NDR.		
B A17	NIA1	Aeropark, Norwich International Airport	36.17	Sites forms part of the planned Aeropark. NDR delivery will unlock the site with potential to capture excess demand on the Airport Industrial Estate.	Mix of B class uses, particularly B2 and B8, that will make use of the connectivity afforded by the delivery of the NDR.	

### South Norfolk Employment Supply

2.79 As shown below in Figure 4, the employment sites in South Norfolk can be split into eight sub-market clusters:

- A47 Corridor
- Wymondham
- Long Stratton
- Diss
- Harleston
- B1332 Corridor
- Loddon
- Hingham

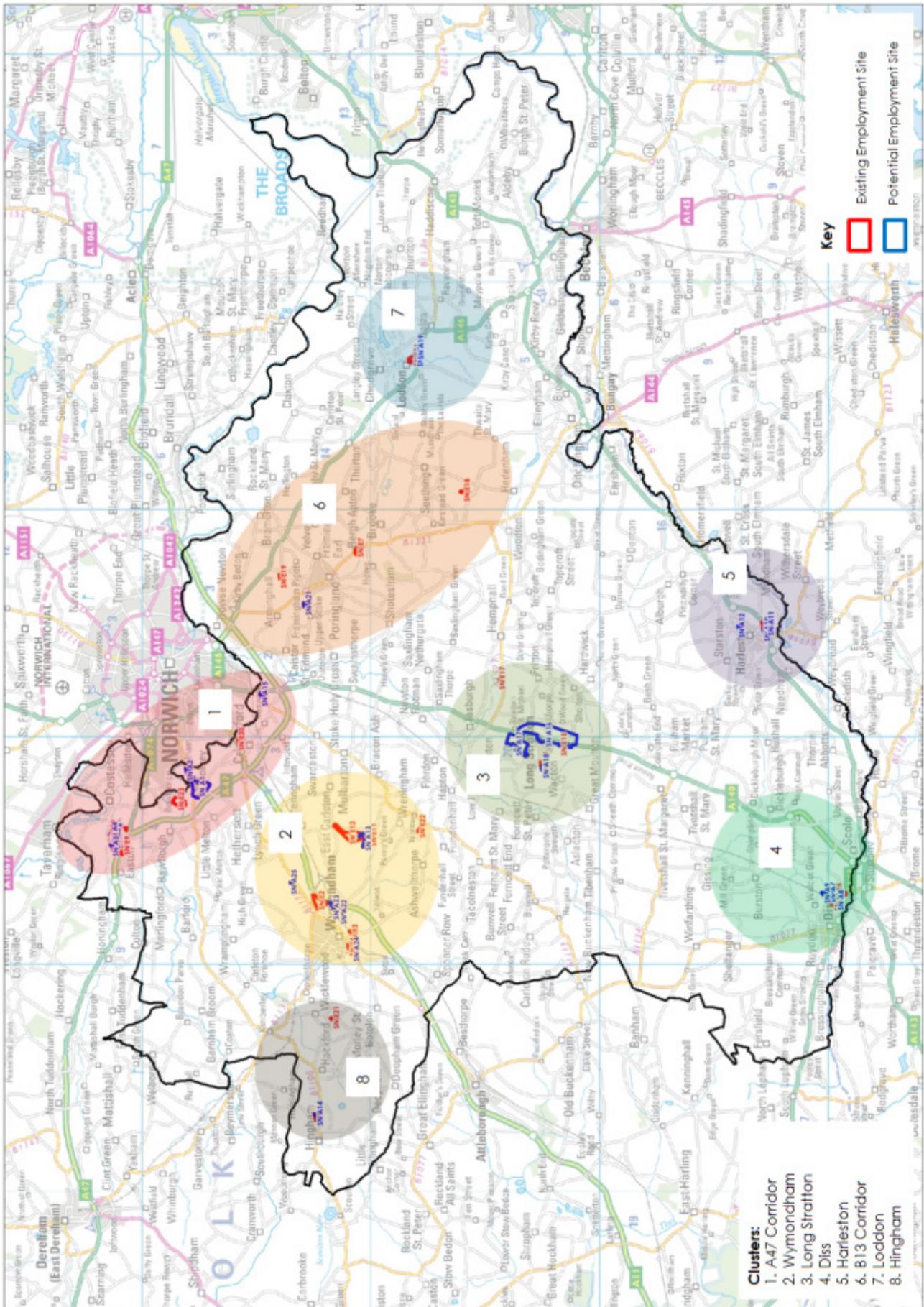
2.80 This seeks to reflect key distinctions in employment activity and employment land provision based on the geographic clustering of sites, drawing on the property market analysis presented in the baseline report.

2.81 There are twenty three active employment sites included within the assessment of South Norfolk’s employment land supply, totalling 218 ha of existing land. In addition, South Norfolk Council identifies seventeen potential employment sites within the local authority area, totalling 198 ha.

2.82 Sites that neighbour one another and share similar characteristics or overlapping uses are grouped when better understood as a single site and noted as such. Grouped sites may include a mix of existing and allocated sites. Full site assessment detail is provided in the South Norfolk Site Assessment Matrix in Appendix I.

- 2.83 As follows below, a review of the sites within each sub-market cluster is provided alongside the advised future action. This is supported by the provision of a table for each sub-market cluster which sets out key site characteristics, their building stock and site quality, and a brief note on future advice. The tables provides a snapshot of each site and enable quick reference to the South Norfolk Site Assessment Matrix.
- 2.84 In addition to the tables for existing sites, tables are provided for proposed sites which set out key site characteristics and advice for the future use of these allocations. The advice is intended to support the prioritisation of development and draws upon policy documents where relevant to a site. Full site assessment details can be reviewed together with the existing sites in the South Norfolk Site Assessment Matrix.

Figure 4: South Norfolk Overview Map: Clusters of Existing and Potential Employment Sites



### A47 Corridor Cluster

- 2.85 The A47 Corridor cluster encompasses 4 existing employment sites totalling 61ha. The cluster includes the Norwich Research Park which fall within the Cambridge-Norwich Tech Corridor, following the A11, and accommodates research institutions with regional and national significance. There are development opportunities identified around the Research Park with growth potential part of which are part of the phased development opportunity.
- 2.86 Existing and allocated sites at the North side of Longwater have been grouped for assessment given their overlapping use and indistinct boundaries. Sites located in the A47 Corridor Cluster are typically well connected and accommodate high quality stock this may result from their proximity to Norwich and strategic highways locations.
- 2.87 More specifically, sites at Longwater have utilised the large junction location on the A47 and has also seen the development of large retail in addition to retained open storage. As a large site, the North of Longwater shows clear development and intensification opportunities.
- 2.88 Other sites to the South, including the existing SN E20 and allocated SN A15 are fairly restricted with less potential for development than the two further north. Collectively however, sites in the A47 Corridor Cluster promise some of the largest and best connected employment locations in South Norfolk which are all likely to benefit from proximity to Norwich.

Table 24: A47 Corridor Cluster Existing Site Profiles

GVA Site Ref	Council Site Ref	Site	Site Area (ha)	Predominant Stock Quality	Overall Site Quality	Future Advice
SN E8	SN019	Longwater (N)	36.0	Mixed	Mixed	<b>Protect &amp; Enhance</b> New development within and existing site accommodating new occupiers.
SN E9	SN020	Longwater (S)	8.2			<b>Protect &amp; Maintain</b> Supporting existing activity.
SN E20	-	Jewson and Schofield Publishing Site	1.8			<b>Monitor &amp; Manage</b> Constricted site unsuitable to certain commercial uses because of surrounding residential uses
SN E23	SN003	Colney Hall	15.0			<b>Monitor &amp; Manage</b> Converted barns for commercial uses surrounded by woods. Intensification, expansion and future commercial may not be possible.

- 2.89 The A47 cluster includes three proposed sites totalling 106 ha. As shown in Table 25, each site borders the existing Norwich Research Park and are likely to accommodate expansion with

predominantly B1a/b class uses. Sites SN A1 and SN A2 are prioritised and CFS 4, a call for sites location, is advised to be retained for potential further expansion of the research park. The Norwich Research Park and opportunities for the employment site are discussed in detail in the strategic site clusters section below.

2.90 In addition to these additional/extension sites there is significant development potential on vacant sites within the Longwater Employment Area. Data provided by South Norfolk Council suggests 11ha of land are being prompted within the area for future development. Longwater is considered as a whole in the following section.

Table 25: A47 Corridor Cluster Proposed Site Profiles

GVA Site Ref	Council Site Ref	Site	Site Area (ha)	Strategic Context	Future Sectors	Future Potential
SN A1	COL 1	Land adj to Norwich Research Park, Colney	38.79	Site lies adjacent to the Norwich Research Park and is allocated in the South Norfolk Local Plan for the extension of the park.	Site is allocated form predominantly B1b class uses in line with those on the adjacent park. Sectors are expected to reflect those existing on the park.	Site has seen development on the eastern fringe, adjoining the existing research park. The site is likely to see continued extension of the science park up to Hethersett Lane.
SN A2	COL 2	Land rear/east of Institute of Food Research, Colney	3.50	Site lies adjacent to the Norwich Research Park and is allocated in the South Norfolk Local Plan for the extension of the park.	Site is allocated form predominantly B1b class uses in line with those on the adjacent park. Sectors are expected to reflect those existing on the park.	Part of the existing NRP masterplan. Planned expansion to the area built upon the role of A11 Tech Corridor.
SN A3, SN A4, SN A5, SN A6.	COS 3	Sites within the Longwater Employment Area	11	Sites form part of the existing Longwater Employment Area and would provide significant additional capacity	The sites are surrounded by a mix of large scale uses, including aggregates. It is fronted by major out of town retail. A mix of small industrial estates provide for light industrial, manufacturing and distribution uses	The sites offer the opportunity to provide new, good quality mixed B class employment space. It is likely demand will be focussed on 'industrial' activity.
CFS 4	COL(a)	Milestone Plantation Site	63.55	Site has been identified in the call for sites, and will likely form the extension of NRP following the development of the allocated sites. Part of CFS 4 is included in the NRP masterplan.	As with the allocated sites, CFS 4 likely to reflect existing sectors with predominantly B1b uses.	Site likely to see expansion of the science park and zone 3 has outline planning permission. Recommended for B-class use.

## Wymondham

- 2.91 The Wymondham cluster includes 6 existing employment sites totalling 67ha. Sites in Wymondham town have seen a large amount of new development which include a range of B class and retail uses. The Lotus Site and Hethel Engineering Centre in the rural periphery are dedicated to specific engineering uses and show similar high site quality to those more centrally located in Wymondham. The Ashwellthorpe Industrial Estate is located at the furthest distance from Wymondham and is more mixed, holding a localised value.
- 2.92 Sites in Wymondham town have good road connection with proximate access to the A11 and B1172 in addition to two railway stations. The peripheral engineering sites are less well connected yet the Lotus Site requires a large amount of land for its test track which also attracts the Hethel Engineering Centre. Overall both sites have other locational imperatives than immediate road access. As such the transport network is adequate for existing uses yet the range of potential future commercial uses is likely to be constrained.
- 2.93 These sites are high value in the form of new and contemporary uses within Wymondham and high value engineering in the rural periphery. These sites fall within the Cambridge-Norwich Tech Corridor and make key contributions the high skill industries that follow along the A11. The Ashwellthorpe Industrial Estate is lower value but is less dependent on the wider market and continues to be valuable to the local businesses that depend on it. All sites should therefore be protected and maintained, with the vision of anchoring uses in Wymondham town.

Table 26: Wymondham Existing Site Profiles

GVA Site Ref	Council Site Ref	Site	Site Area (ha)	Predominant Stock Quality	Overall Site Quality	Future Advice
SNE2	SN014	Gateway 11	18.5	Green	Green	<b>Protect &amp; Maintain</b> New development accommodating new occupiers.
SN E3	SN026	Bridge Industrial Estate	5.3	Yellow	Green	<b>Protect &amp; Maintain</b> New development accommodating new occupiers.
SN E4	SN013	Ivygreen Villa	3.6	Green	Green	<b>Protect &amp; Maintain</b> New development accommodating new occupiers.
SN E11	SN029	Hethel Engineering Centre	1.9	Green	Green	<b>Protect &amp; Maintain</b> New site with high value occupiers.
SN E12	-	Lotus Site	35.4	Green	Green	<b>Protect &amp; Maintain</b> Mature site with high value occupier.
SN E22	SN027	Ashwellthorpe Ind Est	2.34	Yellow	Green	<b>Protect &amp; Maintain</b> Locally orientated site with mix of occupiers that hold local value.

- 2.94 The Wymondham cluster includes four proposed sites totalling 48ha. Three of the sites, SN A22, SN A23, SN A24, lie on the urban periphery of Wymondham and SN A13 lies between the Lotus site and Hethel Engineering Centre. Sites SN A22 and SN A23 are bisected by a road and are considered together in Table 27 because of their proximity and similar character.
- 2.95 Site SN A13 is designated as part of the proposed Hethel Technology Park and as such can accommodate range of uses that will predominantly cater to B1 and B2 class uses. Site SN A24 is allocated but has since seen development on the site with uses reflected the neighbouring SN E4 with B1, B2 and Sui Generis uses which should continue to be supported. Sites SN A22 and SN A23 are well connected with proximate access to a large junction on the A11 which would support a range of B1, B2 and B8 class uses.

Table 27: Wymondham Proposed Site Profiles

GVA Site Ref	Council Site Ref	Site	Site Area (ha)	Strategic Context	Future Sectors	Future Potential
SN A13	HETHEL 2	Land south and west of Lotus Cars	20.98	Site planned to form part of the Hethel Technology Park alongside the Hethel Engineering Centre to the south and Lotus site to the north. Site is proximate to the A11 which was recently branded as a technology corridor between Cambridge and Norwich and this site is expected to support that.	Site likely to accommodate high value technology sectors in a mix of B class use buildings.	Site lies adjacent to two existing employment sites (SN E11 and SN E12). Planned to form the Hethel Technology Park and recommended for B-class use
SN A22/23	WYM 5	Land at Browick Road, Wymondham	21.90	Site lies adjacent to one of the key A11 junctions that leads into Wymondham. The A11 has been branded as a technology corridor and alongside other development activity in Wymondham, these sites could capture associated demand.	Sites have a capacity to accommodate a mix of sectors and B-class uses as reflected throughout Wymondham. Also potential to be more specialised in high value technology related sectors.	Sites SN A22 and SN A23 are considered together. Sites are bound by A11 which forms the Tech Corridor between Cambridge and Norwich. Site are recommended for B-class use.
SN A24	WYM 6	Land adj Chestnut Drive Business Pk, London Road, Wymondham	5.16	Site lies adjacent to an existing site and has since seen expansion of similar uses into the allocated site.	Sectors that now occupy the site are mixed, including consultancy, manufacturing and comparison retail. Further development on the site will continue to reflect this mix.	Site has seen extension from adjacent existing site (SN E4).

## Long Stratton

- 2.96 The Long Stratton cluster includes 3 existing employment sites totalling 8ha. These sites accommodate a mix of B class uses, and tend to have a fairly average stock quality, which results from the dated and rural character of these sites.
- 2.97 Each of the sites in the Long Stratton cluster lie in proximity to the A140 which forms a key trunk road leading south from Norwich. Connectivity will be further enhanced with the proposed bypass as part of the Long Stratton Area Action Plan which will aid to unlock further sites in the area. Many of the uses on the existing sites have local value and should be maintained however the Moringthorpe site should be monitored given its potentially unsuitability for future B class uses.

Table 28: Long Stratton Existing Site Profiles

GVA Site Ref	Council Site Ref	Site	Site Area (ha)	Predominant Stock Quality	Overall Site Quality	Future Advice
SN E14	SN021	Tharston Industrial Estate	5.5	Mixed		<b>Protect &amp; Maintain</b> Good site with a mix of occupiers.
SN E15	SN010	Ipswich Road	0.8			<b>Monitor &amp; Manage</b> Site dedicated to agricultural uses, may not be suitable for future B class uses.
SN E17	SNNEW03	Morningthorpe	1.9	Mixed		<b>Monitor &amp; Manage</b> Site with dated buildings, may not be a sustainable B class use location.

- 2.98 The Long Stratton cluster has three allocated sites totalling 14 ha. Each of the sites lie on the periphery of Long Stratton and are included in the Long Stratton area action plan with large amounts of residential use planned on SN A16 and SN A17. Development is however likely to see some B class uses and across the three sites this will reflect what exists within Long Stratton with predominantly B1 and B2 class uses.

Table 29: Long Stratton Proposed Site Profiles

GVA Site Ref	Council Site Ref	Site	Site Area (ha)	Strategic Context	Future Sectors	Future Potential
SN A16	LNGS1	Land east, south-east and north-west of Long Stratton, Long Stratton	8.66	Large allocated site that will predominantly see residential development. Employment area will border existing employment that adjoins the site.	Potential for a mix of b-class uses but sectors likely to reflect the current local mix.	Part of wider Longstratton Masterplan which comprises a significant residential extension. Recommended for B-class use as

GVA Site Ref	Council Site Ref	Site	Site Area (ha)	Strategic Context	Future Sectors	Future Potential
SN A17	LNGS1	Land east, south-east and north-west of Long Stratton, Long Stratton	3.32	Large allocated site that will predominantly see residential development. Employment area is expected to border existing South Norfolk Council site that will adjoin the development.	Potential for a mix of b-class uses but sectors likely to reflect the current local mix.	allocated.
SN A18	LNGS2	Land west of Tharston Ind Est, Long Stratton	3.84	Site borders an existing employment site and will form part of its extension.	Sector should reflect those in the adjoining existing site.	Site is recommended for B class use development as extension of the adjacent existing employment site (SN E14); Could potentially accommodate future growth needs due to expansion of Longstatton Masterplanning area.

**Diss**

2.99 The Diss cluster includes 2 existing employment sites totalling 23ha. Both sites are relatively large, given the size of Diss and its rural location, and both accommodate a mix of B class uses in addition to a high proportion of retail. Both sites are in close proximity to one another, bisected by the railway line and a residential development, forming a wider industrial area.

2.100 The Vince Road site to the west of the railway line is more dated and this is reflected in its mixed and dense character whereas the Sandy Lane/ Sawmill Farm site is characterised by larger units with a high amount of retail and opportunities for further development. Both sites have good access to the strategic road network leading from the A1066 which connected outside Diss to the A140. Both sites are also proximately located to the Diss railway station that is accessible on foot.

2.101 Both sites are recommended for protection and maintenance as both will provide continued B class use opportunities and, as shown in their size, deliver a large amount of jobs for Diss and the surrounding villages.

Table 30: Diss Existing Site Profiles

GVA Site Ref	Council Site Ref	Site	Site Area (ha)	Predominant Stock Quality	Overall Site Quality	Future Advice
SN E5	SN006	Sandy	13.6	Mixed		Protect & Maintain

GVA Site Ref	Council Site Ref	Site	Site Area (ha)	Predominant Stock Quality	Overall Site Quality	Future Advice
		Lane/Sawmills Farm				Mature site with a mix of occupiers.
SN E6	SN022	Vince Road	8.9			<b>Protect &amp; Maintain</b> New development accommodating new occupiers.

2.102 The Diss cluster includes four proposed sites totalling 14 ha. Each lies to to the east of the rail line that pass through Diss and lie adjacent to the existing SN E5 site. Site SN A7 and SN A9 for northern extensions to the existing site and both have seen development with SN A7 largely developed out with a mix of B class uses with large floorplates. SN A8 is largely vacant with some existing storage use which could accommodate uses the reflect the existing in the neighbouring site. CFS 3 currently has B8 agricultural storage use which should be retained for employment uses and could look better reflect neighbouring uses in the future. The Diss cluster and opportunities for employment sites are discussed in detail in the strategic site clusters section below.

Table 31: Diss Proposed Site Profiles

GVA Site Ref	Council Site Ref	Site	Site Area (ha)	Strategic Context	Future Sectors	Future Potential
SN A7/A9	DIS9/10	Land North of Diss Business Pk, DISS	7.70	SN A7 acknowledged in the South Norfolk Local Plan as now mostly developed. Capacity for similar development to continue north into SN A9 as required. Potential to see increased demand for land as fast connection between Norwich and London is introduced and these sites can capture that.	Uses to reflect the mix in adjacent SN E5 and SN A7. Potential for this to widen with the delivery of the Norwich to London fast line.	Sites SN A7 and SN A9 are considered together. Site SN A7 has seen extension of the adjacent existing employment site (SN E5). SN A7 is recommended for B class use development as is SN A9 as required.
SN A8	DIS8	Land at Station Road/Nelson Road, Diss	2.92	Site identified in the Local Plan and allocated to accommodate B-class uses. Delivery of Norwich to London fast line may increase demand.	Sectors and uses likely to reflect those existing in SN E4 and SN E5. Potential for this to widen with the delivery of the Norwich to London fast line.	Site is recommended for B class use given existing B class environs.
CFS 3	DIS(a)	Frontier Agriculture Site	3.61	Site identified in the call for sites which could	Potential to accommodate a mix of B-class uses	Potential to consider for B-class use.

GVA Site Ref	Council Site Ref	Site	Site Area (ha)	Strategic Context	Future Sectors	Future Potential
				accommodate a mix of uses. Delivery of the Norwich to London fast line may increase demand in Diss.	with a mix of sectors reflecting those existing in Diss.	

### Harleston

- 2.103 The Harleston cluster includes 1 existing employment site totalling 9ha. The single site in the Harleston Cluster is the Harleston Industrial Estate which has been considered in combination with the adjacent SN A10 allocated site which provides a natural expansion opportunity.
- 2.104 The Harleston Industrial Estate has a mix of B class uses set within sizeable industrial units which are variable in their quality. The site located on the southern periphery of Harleston and is well connected with proximate access to the A143 from the Mendham Lane.
- 2.105 The site is likely to provide continued commercial use opportunities and the potential for expansion to the West is likely to support the case for other residential development that appears to be occurring in Harleston. Given the local value of uses, the estate should be protected and maintained.

Table 32: Harleston Existing Site Profiles

GVA Site Ref	Council Site Ref	Site	Site Area (ha)	Predominant Stock Quality	Overall Site Quality	Future Advice
SN E1	SN023	Harleston Industrial Estate	8.7	Mixed		<b>Protect &amp; Maintain</b> Mature site with a mix of occupiers and potential for further development.

- 2.106 The Harleston cluster includes two proposed site totalling 6 ha. SN A11 lies to the south of the existing SN E1 site and SN A13 is located within the north of the settlement. An additional site is SN A10 but the site lies adjacent to SN E1 and effectively forms part of the site as an extension.
- 2.107 SN A11, located to the south of SN E1, is well positioned on the A143 and can accommodate similar uses to that on the adjacent existing site with predominantly B2 and B8. SN A13 has some existing storage use within the south of the site and this can be retained with similar uses with small footprints within the north.

Table 33: Harleston Proposed Site Profiles

GVA Site Ref	Council Site Ref	Site	Site Area (ha)	Strategic Context	Future Sectors	Future Potential
SN A11	HAR7	Land south of Spirketts Lane, Harleston	4.47	Site strategically located on the A143, opposite and existing industrial estate. The site is well positioned to accommodate expansion of the existing site.	The site can accommodate a mix of B class uses and sectors likely to reflected those on the existing SN E1.	Accommodating existing employment use.
SN A12	HAR5	Land off Station Hill, Harleston	1.08	Site positioned in a relatively central location in Harleston with good connectivity and some existing use. Potential for redevelopment that better suits the central location.	Site likely to accommodate similar sectors to those existing on the site. Alternatively the site could be redevelopment to accommodate more mixed use with B1/2 class uses and associated sectors.	Site is recommended for B class extension from the site to the south.

### B1332 Corridor Cluster

2.108 The B1332 Corridor cluster includes 3 existing employment sites totalling 13 ha. Each of the sites are relatively rural in character and although site outlines suggest potential for expansion, this may not necessarily be the most suitable course of action. Each site includes a mix of B class uses and some of these are not necessarily entirely defined on site with high amounts of open storage.

2.109 Each of the sites have relatively weak access to the strategic road and rail network but all have direct access to Norwich via the B1332. Existing uses should however be protected given their local value and that their activity is not necessarily dependent on direct access to the strategic road network, or proximity to local facilities and amenities. Nonetheless, future uses should be considered within these site and access constraints.

Table 34: B1332 Corridor Cluster Existing Site Profiles

GVA Site Ref	Council Site Ref	Site	Site Area (ha)	Predominant Stock Quality	Overall Site Quality	Future Advice
SN E7	BKE3	Framingham Pigot	4.9			<b>Monitor &amp; Manage</b> Converted barns for commercial uses surrounded by woods. Intensification, expansion and future commercial may be unadvisable.
SN E18	-	Harvey Lane	4.5			<b>Monitor &amp; Manage</b> Rural mixed use site with a large

GVA Site Ref	Council Site Ref	Site	Site Area (ha)	Predominant Stock Quality	Overall Site Quality	Future Advice
						amount of open storage that may not be suitable for conventional use.
SN E19	SN031	Brooke Industrial Estate	3.4			<b>Protect &amp; Maintain</b> Site with mix of occupiers and development opportunity.

2.110 The B1332 Corridor cluster includes a single proposed site with a site area of 4 ha. The site was previously used by the Ministry of Defense yet would poorly accommodate B class uses. This results from neighbouring residential uses and the inability of active employment use on the site to reflect the relatively low traffic and quiet character of the existing mast use. As such, B-class uses is not recommended for the site.

Table 35: B1332 Corridor Cluster Proposed Site Profiles

GVA Site Ref	Council Site Ref	Site	Site Area (ha)	Strategic Context	Future Sectors	Future Potential
SN A21	POR 3	Ex MOD site, Pine Loke, Poringland	4.33			Site had a previous bespoke use and is not recommended for B class use.

## Loddon

2.111 The Loddon cluster includes 1 existing employment site totalling 13 ha. The single site in the Loddon Cluster is the Loddon Industrial Estate which has been considered in combination with the adjacent SN A19 and SN A20 allocated sites which provide natural expansion opportunities.

2.112 The Loddon Industrial Estate has a mix of B class uses set within sizeable industrial units which are variable in their quality. The site located to the South East of Loddon and is well connected with proximate access to the A146 via Beccles Road.

2.113 The site accommodates several high value engineering uses and is likely to provide continued commercial use opportunities. Potential for expansion at the southern end of the site is likely to facilitate the growth of businesses on the site and continue to anchor their location in Loddon. Given the local value of these uses, the estate should be protected and maintained.

Table 36: Loddon Existing Site Profiles

GVA Site Ref	Council Site Ref	Site	Site Area (ha)	Stock Quality	Site Quality	Future Advice
--------------	------------------	------	----------------	---------------	--------------	---------------

GVA Site Ref	Council Site Ref	Site	Site Area (ha)	Stock Quality	Site Quality	Future Advice
SN E16	SN025	Loddon Industrial Estate	13.3	Mixed		<p><b>Protect &amp; Maintain</b></p> <p>Mature site with a mix of occupiers and potential for further development.</p>

### Hingham

2.114 The Hingham cluster includes two existing employment sites totalling 12ha. The sites include a mix of B class uses but are quite distinct in their character. The Hingham Industrial Estate is a high quality site located at the Eastern fringe of Hingham with a mix of occupiers set within large industrial buildings and opportunities for expansion to the north and east. The Wicklewood site appears to be a historic agricultural site that is now seeing a mix of uses, such as conversion to big box storage, which is more rurally located with constrained access and growth potential.

2.115 The Higham Industrial Estate should be protected and maintained, and opportunities for development on the adjoining allocated site to the east should be considered. The Wicklewood site should be monitored and managed, acknowledging that the site is likely to hold local value but that some B class uses are unlikely to be suitable on the site.

Table 37: Hingham Existing Site Profiles

GVA Site Ref	Council Site Ref	Site	Site Area (ha)	Stock Quality	Site Quality	Future Advice
SN E13	SN024	Hingham Industrial Estate	8.6	Mixed		<p><b>Protect &amp; Maintain</b></p> <p>Good sites with a mix of occupiers and potential for further development.</p>
SN E21	SN033	Wiklewood	3.7			<p><b>Monitor &amp; Manage</b></p> <p>Rural mixed use site in an agricultural location which may be constrain future B class uses.</p>

### 3. Strategic Site Clusters

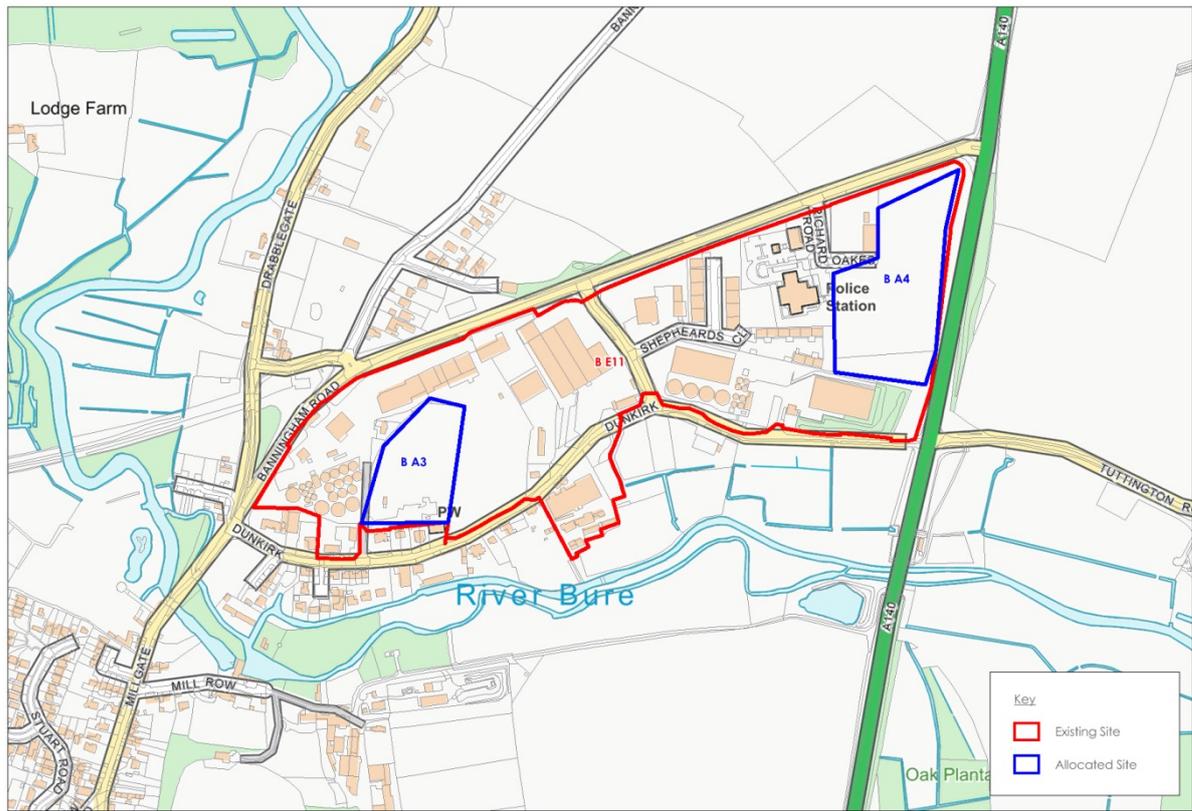
3.1 In this section we have reviewed some of the key strategic employment sites in Greater Norwich. The list is based on the recommendation from the GNLP team who have identified a number of sites with strategic significance for factors such as occupiers, sectors, location, infrastructure and scale. Each of these sites exhibits special characteristics and has key role to play in the economic future of the area. Assessments for these sites were undertaken based on combination of site visits and a detailed desktop review. The section presents a comprehensive profile for each existing employment sites and provides a recommendation for any allocations within or in a close proximity of these sites. The profiles presented draw on the site assessment forms in Appendix II of this report.

#### Dunkirk Industrial Estate

Site	Dunkirk Industrial Estate
<b>Site Reference</b>	GVA Ref: B E11; LA Ref: BD004
<b>Overview</b>	<p>The Dunkirk Industrial Estate, as shown in Figure 5, is located on the north eastern fringe of Aylsham to the north of Broadland. The site is set across 17.8ha and is best described as an established general industry/business area neighbouring residential/rural uses. The site is considered a strategic employment site under DM DPD E1 and borders two allocated sites, site B A3/AYL3 and site B A4/AYL4. These allocated sites are planned to accommodate B1, B2 and B8 class uses as set out in the 2016 Site Allocations DPD. Further, AYL4 has been identified in the 2015/16 Annual Monitoring Report to have planning permission granted for B1 (offices and light industry) and B8 (storage and distribution) which has yet to be implemented.</p> <p>The site has good internal circulation, parking and access which is supported by Dunkirk Road/ Banningham Road passing around the periphery of the site, providing multiple accesses. The two allocated sites also have good access via Dunkirk Road/ Banningham Road without requiring access from within the existing site. Multiple access to the site facilitate development and should enable B-class uses of the two allocated sites in accordance to the Site Allocation DPD.</p>
<b>Existing Occupiers</b>	<p>The existing site has a mix of B-class uses that include agricultural services and storage, automotive repair, printing, builders merchants, iron works, and an air rifle shop. Occupiers include Dewing Grain, Tyre Tech 24, S &amp; M Supplies, Barnwell Print, Frontier Agriculture, Ben Burgess, OTW Imaging, J &amp; S Agencies, Printway, Pellpax, CT Baker Builders Merchants, Eastern Pools. These occupiers are not particularly high value but hold local value, providing valuable services to Aylsham and the rural locality.</p>

Site	Dunkirk Industrial Estate
<b>Connections</b>	<p>The site is well connected to the strategic road network via the A140 arterial road which passes to the east of the site and leads south to Norwich. Access to the north of Norwich is expected to be further improved by the delivery of the Northern Distributor Road (NDR) which is expected to be completed in 2017/18. The site is also accessible via public transport with the 44A/X44 bus routes passing to the south west of the site. Located to the northwest of Aylsham, the site has no on-site amenities but lies in proximity to a reasonable range of services that are available in the town centre.</p>
<b>Stock Quality</b>	<p>Buildings within the site are principally industrial units that vary in age and quality, as shown in Figure 6, reflecting how the site has grown gradually. More historic agricultural storage uses have been joined by builders merchants and other uses requiring large footprints in recent years. According to CoStar, there are currently no vacant buildings on the site but the adjoining allocated sites are identified development opportunities. Reflecting demand, AYL4 specifically is being marketed by Arnolds Keys and the site has seen development with CT Baker Builders Merchants occupying the northwest corner of the site.</p>
<b>Potential</b>	<p>As an established site, the location is well suited for its current use with good strategic access and proximity to amenities in Aylsham. As such, the site is likely to see continued interest with low vacancy rates suggesting a need for further development to accommodate occupiers with similar floorspace needs to those existing. The adjacent allocated site AYL4 is currently marketed for development with planning permission achieved and an occupier now located on site. This suggests that the existing site should be retained in line with the strategic importance identified in the DM DPD E1 and that the adjoining allocated sites should come forward for development to accommodate need for increased capacity as identified in the 2016 Site Allocations DPD.</p>

Figure 5: Dunkirk Industrial Estate



Source: Broadland District Council and GVA, 2017

Figure 6: Dunkirk Industrial Estate Site Photos



Source: Google Maps, 2017

Figure 7: B A4/AYL4 Marketed Site Plots



Source: CoStar/Arnolds Keys, 2017

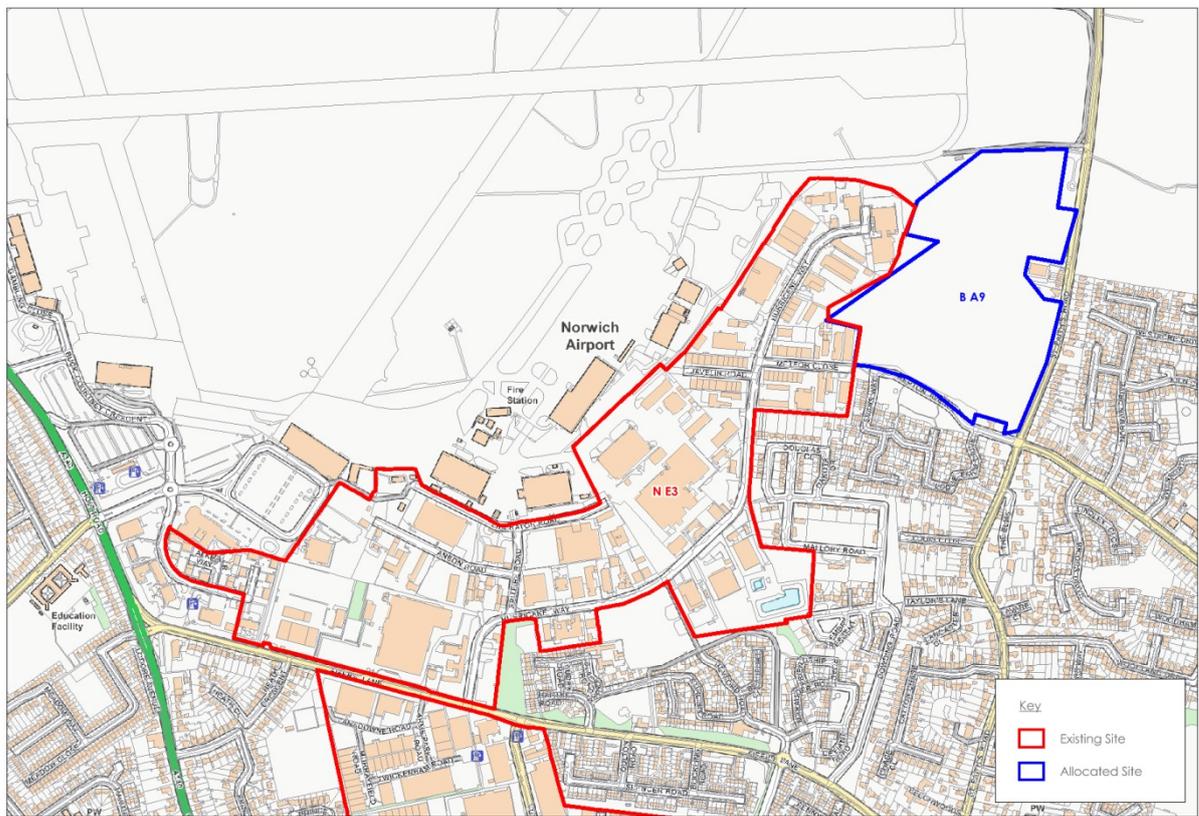
### Airport Industrial Estate

<b>Site</b>	Airport Industrial Estate
<b>Site Reference</b>	GVA Ref: N E3; LA Ref: DM16 (c)
<b>Overview</b>	<p>The Airport Industrial Estate, as shown in Figure 8, is located towards the north of Norwich, bordering the Norwich International Airport. This site is considered separately from the Vulcan Road/Fifers Lane Industrial Estate to the south to better capture the closer relationship of uses with the airport and the potential sites to the east and north of the airport.</p> <p>The site has an area of 47.8ha and accommodates a mix of B-class uses within an urban location with neighbouring residential uses. The site is Norwich Local Plan and Development Management Policies Plan and is subject to Policy DM 16 relating to supporting the needs of business. Such employment areas are prioritised for employment and B-class uses with policy support for expansion.</p> <p>Internal circulation within the site is relatively strong although Hurricane Way</p>

Site	Airport Industrial Estate
	forms one of the main routes through the site with primary access from Fifers Lane and Holt Road. There is little further development opportunity on site and therefore the current internal circulation is likely to remain adequate for current uses.
<b>Existing Occupiers</b>	The mix of B-class uses on the site range across office and industrial uses and include businesses from a range of sectors such as financial services, wholesale, logistics, automotive repair and hire, engineering, builders merchants, it, design and food. A snapshot of occupiers includes Insight Financial Associates Ltd, The Money Centre, Property118, Norse Group, Booker Wholesale, Orwell Truck & Van, UPS, East Bilney Coachworks, Fluke, InTouch Systems, Contract Equipment Sales, We Want Any Car, Direct Food Service, Autotest and Air Livery. These uses are varied in their value, from automotive repair and builders merchants having local importance to high value added financial services and engineering that are more regional in their client and employee catchments. Overall, this site makes significant contributions to the local economy.
<b>Connections</b>	Given proximity to the Norwich International Airport, the site is well connected to the strategic road network with access to the A140 and outer Norwich ring road. Access to the north of Norwich is expected to be further improved by the delivery of the Northern Distributor Road (NDR) which is expected to be completed in 2017/18. The site has strong public transport connections with direct access to Norwich International Airport and a range of bus services that connect the site to Norwich city centre and the Norwich railway station. As such amenities in Norwich city centre are accessible in addition to those, such as restaurants and hotels, which are located near the site.
<b>Stock Quality</b>	Buildings within the site are principally industrial units that vary in age and quality, shown in Figure 10, reflecting the age of the site and the incremental nature of growth and redevelopment. The site includes an office location to the west that accommodates several finance services businesses, accessed by Delft Way, which is high quality and distinct from the rest of the site. According to CoStar, the floorspace vacancy rate has fallen from 6% to 0.6% over the last five years, reflecting the quality of the site and demand for units.
<b>Potential</b>	Continued demand for floorspace within the Airport Industrial Estate is unlikely to be met on site given the little capacity to intensify uses and lack of land for expansion. Attempts to increase capacity in other locations proximate to the airport, specifically the Aeropark scheme, delivered additional floorspace but have been stalled due to a lack of funding and as a result of North Distributor Road (NDR) works. The value of this site and the strong demand for floorspace continues to promote a case to bring forward allocates sites that have similar physical attributes.  B A13 and B A17, shown in Figure 9, are allocated sites that lie to the north

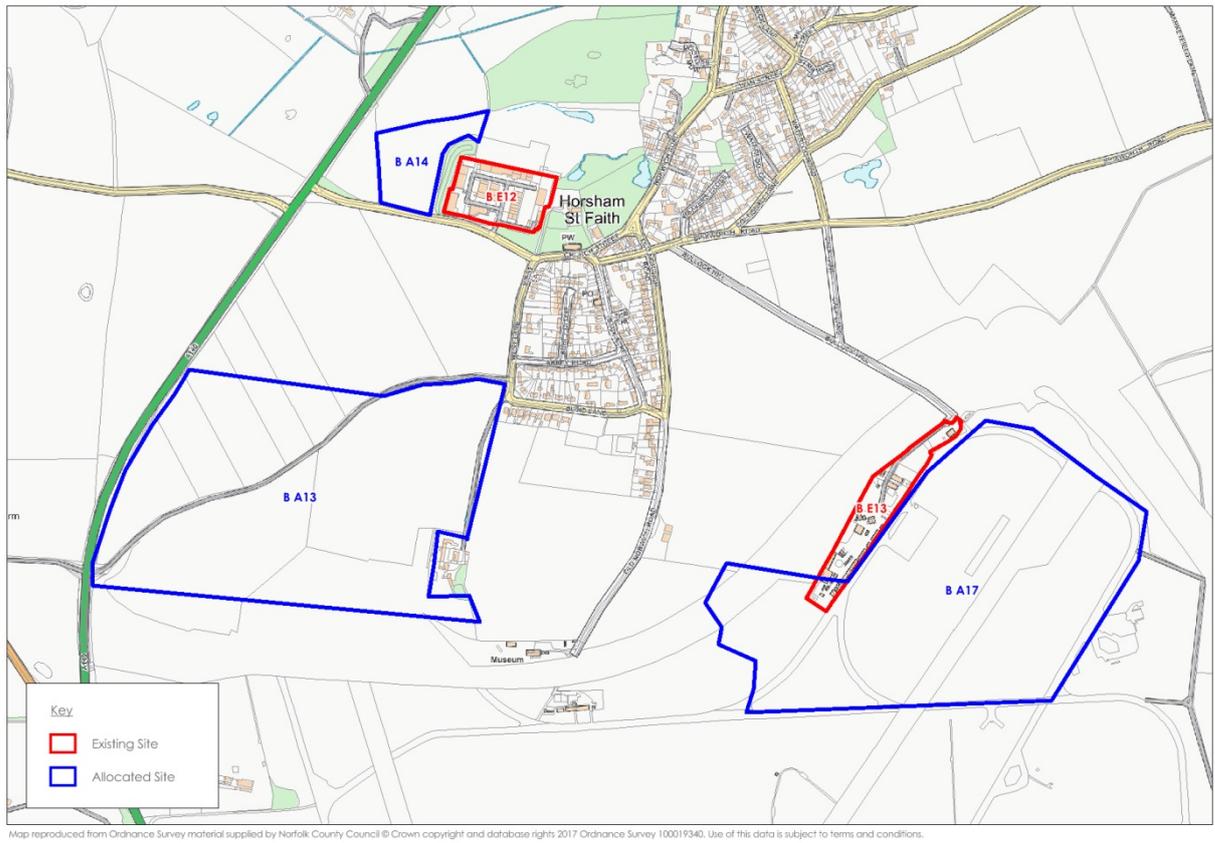
Site	Airport Industrial Estate
	<p>of the Norwich International Airport and present an opportunity to cater to demand for units in this area of Norwich. B A13 is captured in the 2016 site allocations DPD and 2015/16 Annual Monitoring Report, with recommendations for employment related development, and B A17 forms part of the planned Aeropark. Both sites will be well connected to the strategic road network and the existing Airport Industrial Estate with the delivery of the NDR, which both sites have potential direct access to. As such, the existing Airport Industrial Estate should be retained in line with Policy DM 16 of the Norwich Local Plan and Development Management Policies Plan and growth is recommended to be accommodated for on the B A13 and B A17 allocated sites.</p>

Figure 8: Airport Industrial Estate



Source: Norwich City Council and GVA, 2017

Figure 9: B A13 and B A17 Allocated Sites



Source: Broadland/Norwich Councils and GVA, 2017

Figure 10: Airport Industrial Estate Site Photos



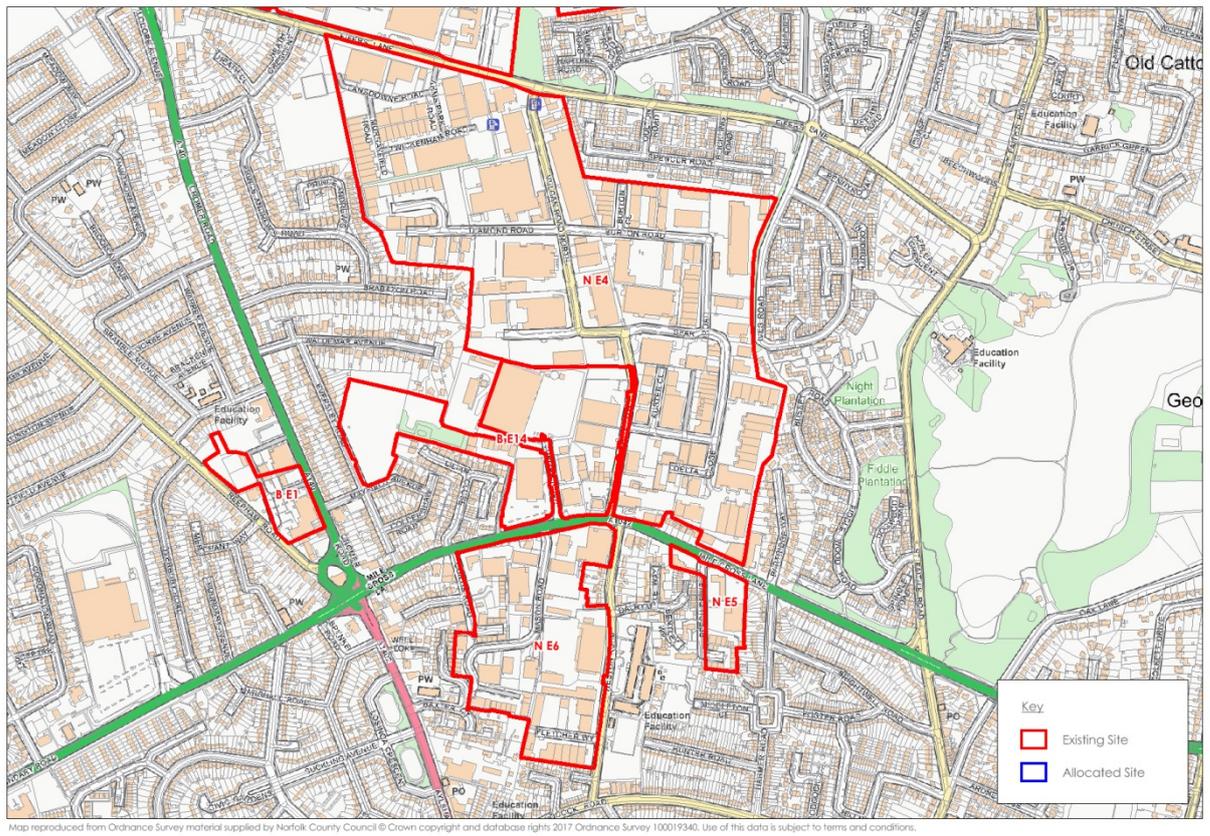
Source: Google Maps, 2017

## Vulcan Road/Fifers Lane Industrial Estate

Site	Vulcan Road/Fifers Lane Industrial Estate
<b>Site Reference</b>	GVA Ref: N E4; LA Ref: DM16 (d)
<b>Overview</b>	<p>The Vulcan Road Estate is located towards the north of Norwich, neighbouring the Airport Industrial Estate on its southern fringe. These sites have not been considered together because the typology of occupiers and connection to the Norwich International Airport are distinctly different. The site has an area of 57.3ha and accommodates a mix of B-class uses within an urban location with neighbouring residential uses. It is noted that the site accommodates a significant level of non-B retail, leisure and trade counter uses – however this does not appear to overly impact the B class activity. The site is Norwich Local Plan and Development Management Policies Plan and is subject to Policy DM 16 relating to supporting the needs of business. Such employment areas are prioritised for employment and B-class uses with policy support for expansion.</p> <p>Internal circulation within the site is relatively strong with the Vulcan Road forming the main routes through the site, with multiple accesses from Mile Cross Lane and Fifers Lane. There is little further development opportunity on site and therefore the current internal circulation is likely to remain adequate for current uses.</p>
<b>Existing Occupiers</b>	<p>The mix of B-class uses on the site range across predominantly industrial uses and include businesses from a range of sectors such as wholesale, comparison retail, restaurants, builders merchants, gyms, beauty, automotive and electronics repair, storage, waste management, printing, charity, recreation, and retail banking. A snapshot of occupiers includes B&amp;M Home Store, KFC, Soul Church, Graham Plumbers Merchant, Sontec Electronics, Barkers Hairdressing and Beauty, Highball Climbing Centre, Esso, Love2Recycle, HSBC Bank, Travis Perkins, Jewson, Break Charity, Desira Nissan, Topps Tiles, Fully Pumped Gym, Autopark Norwich, and Page Bros. These uses are varied in their value but skew towards the lower end with more local rather than regional or national importance. Overall, the Vulcan Road Estate makes a valuable contribution to the local economy as a large site with a mix of locally important uses.</p>
<b>Connections</b>	<p>Given the relatively central location of such a large industrial estate, the site is well connected to the strategic road network with access to the A140 and outer Norwich ring road. Access to the north of Norwich is expected to be further improved by the delivery of the Northern Distributor Road (NDR) which is expected to be completed in 2017/18. The site has strong public transport connections being located in proximity to Norwich International Airport and a range of bus services that connect the site to Norwich city centre and the Norwich railway station. As such amenities in Norwich city centre are accessible in addition to those, such as restaurants and hotels, which are located on and near to the site.</p>

Site	Vulcan Road/Fifers Lane Industrial Estate
<b>Stock Quality</b>	Buildings within the site are principally industrial units that vary in age and quality, shown in Figure 12, reflecting the age of the site, the quality of its uses, and the incremental nature of growth and redevelopment. The site has a relatively continuous typology of units throughout the site which enables the large site to be considered as one. According to CoStar, the floorspace vacancy rate has fallen from 9% to 4.5% over the last five years, reflecting increasing demand albeit not as high as in the neighbouring higher quality Airport Industrial Estate.
<b>Potential</b>	<p>No allocated sites lie adjacent to the existing site and there appears to be no great demand for delivery of another site to capture the growth of the Vulcan Industrial Estate given that uses are relatively general and could be reasonably accommodated throughout Norwich. Growth of the estate may however provide rationale for the delivery of proximate allocated sites in conjunction with other motivations, such as alongside the growth of the Airport Industrial Estate and the bringing forward of sites to the north of the airport.</p> <p>As an established site, the location is well suited for its current use with good strategic access and proximity to a range of amenities on and off site. As such, the site is likely to see continued interest with low vacancy rates and a reasonable supply of available units. Less traditional and non B-class uses, such as recreational uses with large floorplates, should be monitored, with priority for sites and units given to B-class uses. Overall, the existing site should be retained in line with its strategic importance identified in Policy DM 16 of the Norwich Local Plan and Development Management Policies Plan.</p>

Figure 11: Vulcan Road Industrial Estate



Source: Norwich City Council and GVA, 2017

Figure 12: Vulcan Road Estate Site Photos



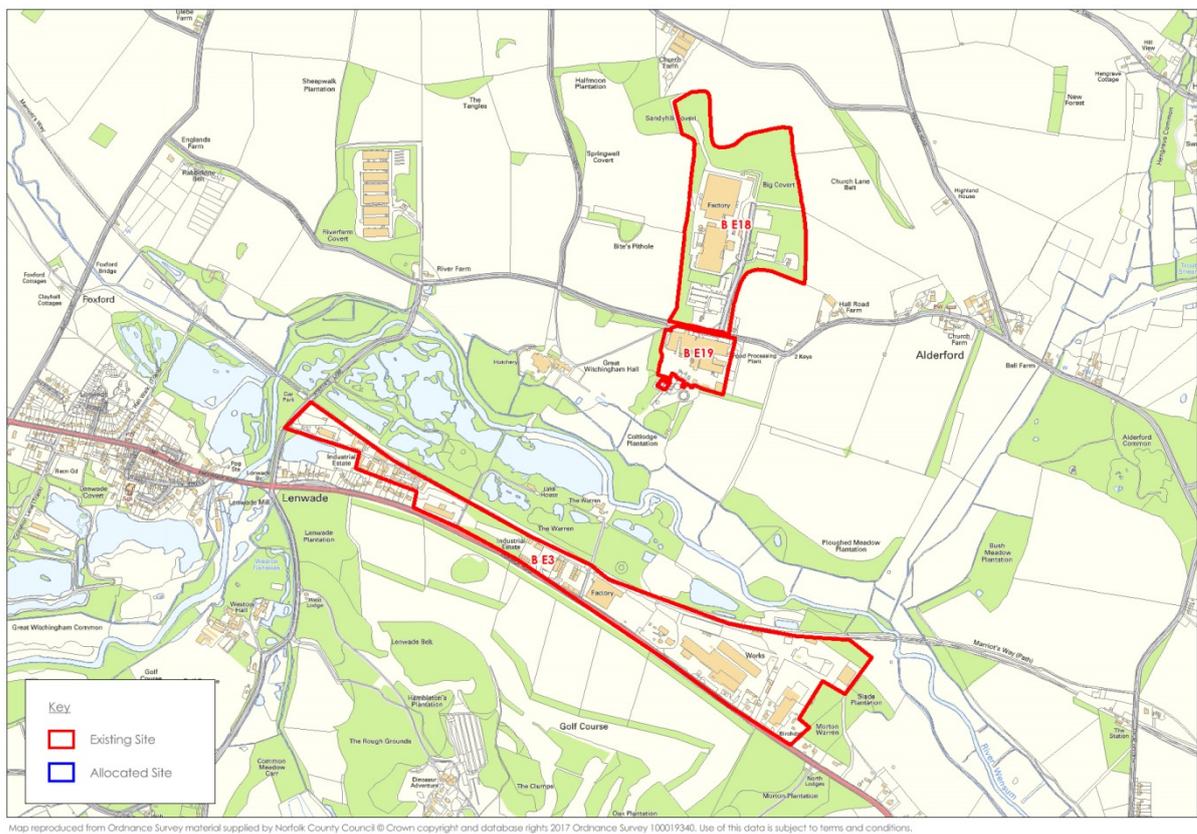
Source: Google Maps, 2017

## Lenwade Industrial Estate

Site	Lenwade Industrial Estate
<b>Site Reference</b>	GVA Ref: B E3; LA Ref: LEN (a)
<b>Overview</b>	<p>The Lenwade Industrial Estate, as shown in Figure 13, follows east from hamlet of Lemwade which is located approximately 12km northwest of Norwich. The site is set across 25.3ha and accommodates a mix of B-class uses within a predominantly rural location. The site is considered a strategic employment site under policy E1 of the Broadland Development Management DPD. Such sites are prioritised for employment and B-class uses with policy support for expansion.</p> <p>The site has reasonable internal circulation, parking and access although many individual sites on the estate are self-contained with their own access. As such, site expansion is unlikely to require additional accesses and the potential development site located towards the centre of the estate appears to have an existing access although it may require widening dependent on the proposed use.</p>
<b>Existing Occupiers</b>	<p>The mix of B-class uses on the site range across predominantly industrial uses and include businesses from a range of sectors such as metal storage and supply, comparison retail, open storage, automotive repair, building services, waste management, and business supplies. A snapshot of occupiers includes Coffee Quest, RISA Waste Management, R J Crane Hire, EMR Lenwade, AP Tuning, Britannia Blinds, Lenwade Motor Services, Polyframe, SCA Performance Centre, Borg &amp; Overstrom, Hunt Sheds, and Natural East. These uses are varied in their value but tend to cater to a regional market while providing good local employment.</p>
<b>Connections</b>	<p>The site is well connected to the strategic road network via the A1067 arterial road from which the site has direct access and leads south east to Norwich. Access to employment locations to the north of Norwich are expected to be further improved by the delivery of the Northern Distributor Road (NDR) which will be completed in 2017/18. The site is also accessible via public transport with the X29 bus route passing on the A1067. Bordering the hamlet of Lenwade, the site has no on-site amenities but lies in proximity to a small range of services available in the neighbouring village of Great Witchingham.</p>
<b>Stock Quality</b>	<p>Buildings within the site are principally industrial units that vary in age, size and quality, shown in Figure 14, which reflects the maturity of the site, the quality of its uses, and the incremental nature of growth and redevelopment. Large units and open storage uses are located to the east of the site, with large single occupiers, and smaller more mixed uses are located towards the west. According to CoStar, the floorspace vacancy rate has fallen from 6% to 0% over the last five years, which could be accounted for by a single building given the variety on the estate, reflecting increased demand for industrial units which is being seen across</p>

Site	Lenwade Industrial Estate
	Greater Norwich.
Potential	As an established site, the location is well suited for its current use with good strategic access and sufficient space for some of the larger uses. The site has seen increased demand, however this is likely to be from occupiers looking for affordable space rather than proximity to any particular location or services and does not necessarily indicate a need for expansion or intensification to meet demand as it can be accommodated elsewhere. The site does have a potentially developable site at its centre which should be considered for similar uses to the west and centre of the site. Overall, the existing site should be retained in line with its strategic importance identified in the 2016 Site Allocations DPD.

Figure 13: Lenwade Industrial Estate



Source: Broadland District Council and GVA, 2017

Figure 14: Lenwade Industrial Estate Site Photos



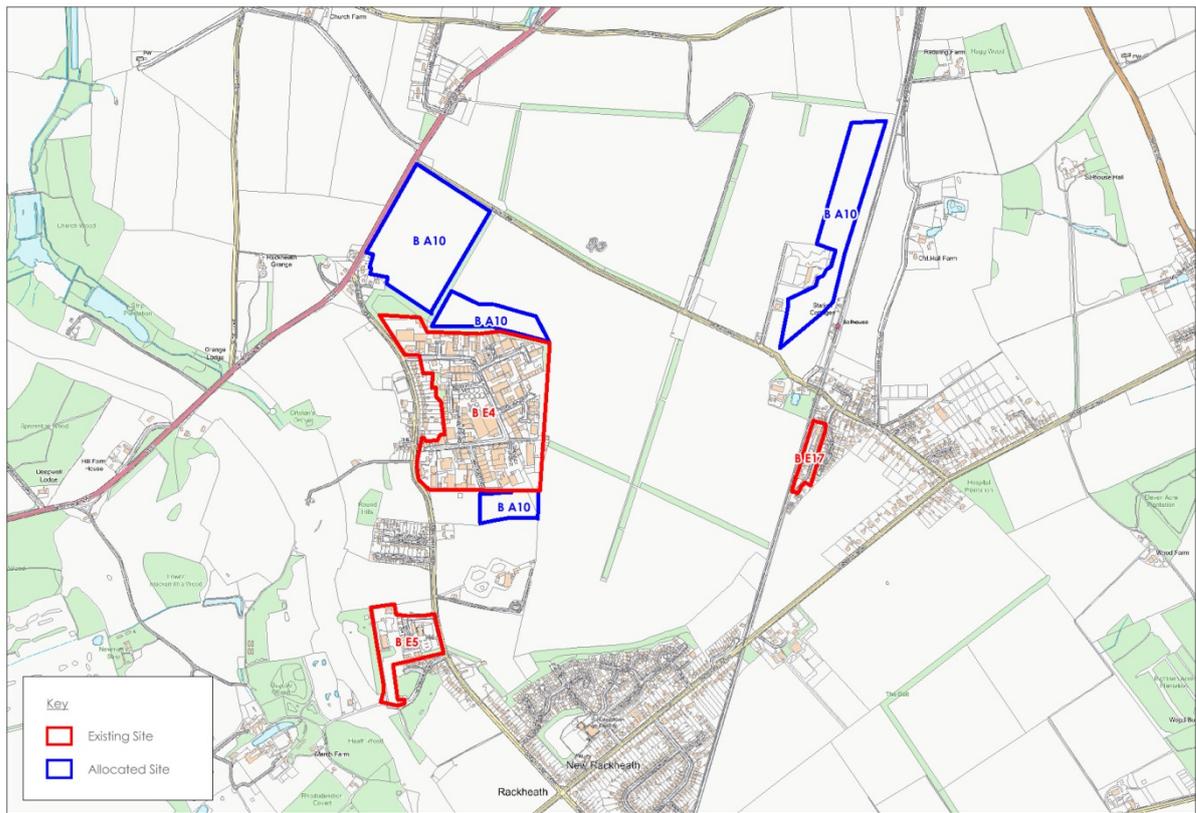
Source: Google Maps, 2017

### Rackheath Industrial Estate

Site	Rackheath Industrial Estate
<b>Site Reference</b>	GVA Ref: B E4; LA Ref: RAC (a)
<b>Overview</b>	<p>The Rackheath Industrial Estate, shown in Figure 15, is located 1km north of New Rackheath and 3km north east of Norwich. The existing site is set across 22ha and is best described as an established general industry/business area neighbouring residential/rural uses. The site is considered a strategic employment site under policy E1 of the Broadland Development management DPD and borders the large allocated site B A10/GT16.</p> <p>The site has good internal circulation, parking and access which is facilitated by the Wendover Road which creates a continuous route through the site. Site expansion, which is expected as part of the Rackheath masterplan shown in Figure 16, is unlikely to create additional strain on the existing Wendover Road as new accesses are proposed from the west.</p>
<b>Existing Occupiers</b>	<p>The mix of B-class uses on the site range across predominantly industrial uses and include businesses from a range of sectors such as comparison retail, packaging, business services and supplies, product manufacturing, printing, coating, automotive repair, and industrial equipment supply. A snapshot of occupiers includes Dreams Bridal, CAM Rider, Jones &amp; Cane Packaging, Dotcolour, Polyprint, Val-U-Computers, Quentor, Eacr Service Centre, Olympic Swimming Pools, Bathroom Warehouse, Delta Fire, Spencer Car</p>

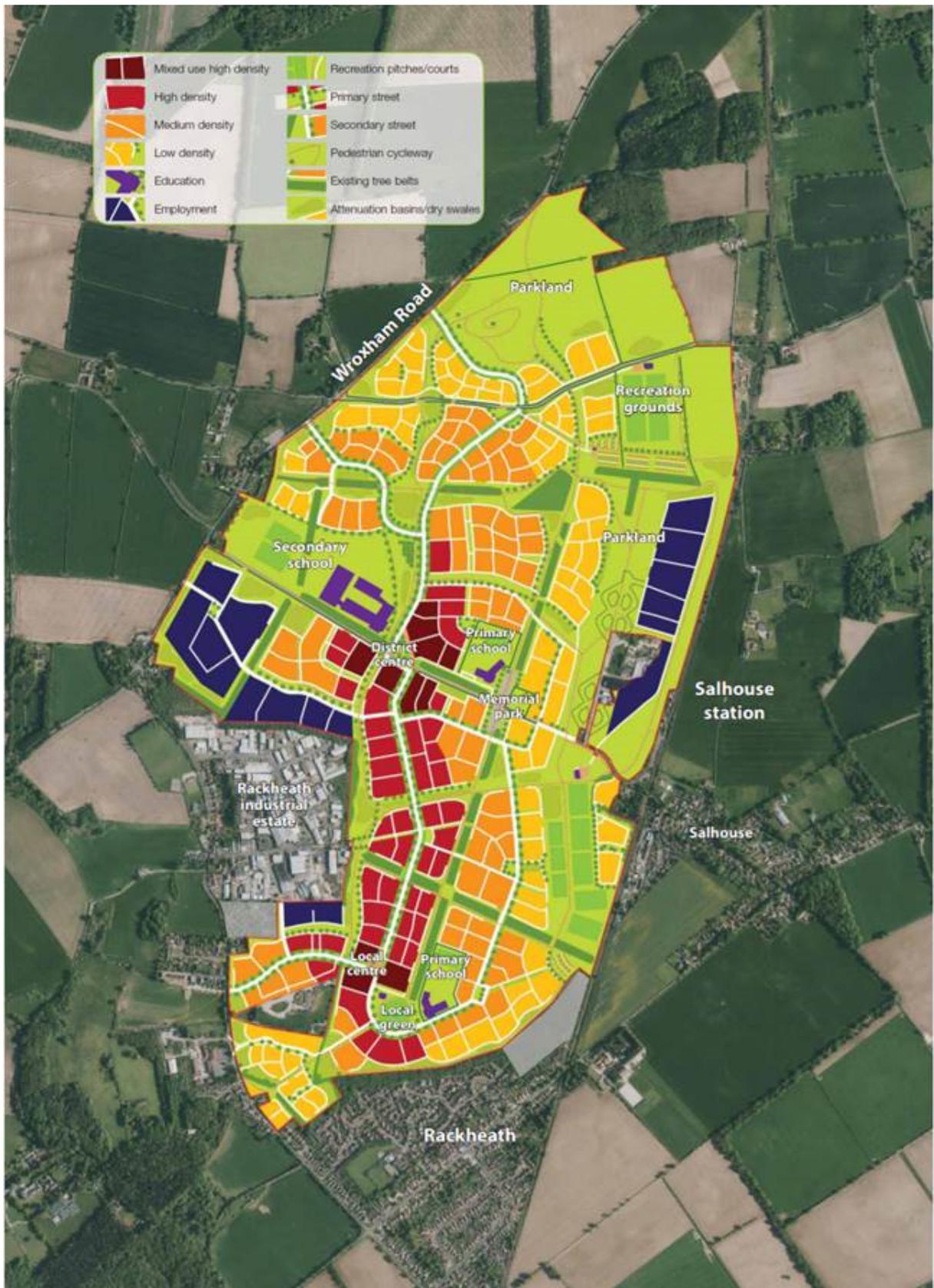
Site	Rackheath Industrial Estate
	Sales, Anglian Bakery & Catering Supplies, Shred Station, Mastercote UK, and Bidwell Max & Sons. These uses vary in their value, ranging from the local car repair services to Delta Fire which manufactures and sells fire fighting equipment across the UK.
<b>Connections</b>	The site is well connected to the strategic road network via the A1151 which passes to the north of the site and leads south west to Norwich. Access to the north of Norwich is expected to be further improved by the delivery of the proximate Northern Distributor Road (NDR) which is expected to be completed in 2017/18. The site is also accessible via public transport with several bus routes passing on the A1151. Located to the north of Rackheath, the site has no on-site amenities but lies in proximity to a limited amount of services in the local area.
<b>Stock Quality</b>	Buildings within the site are principally industrial units that vary in age and quality, as shown in Figure 17, reflecting how the site has grown. The site is mixed and the typology and size of units is similar across the site. According to CoStar, the floorspace vacancy rate has fallen from 1% to 0% over the last five years, reflecting a high level of demand to locate in the estate.
<b>Potential</b>	<p>As an established site, the location is well suited for its current use with high quality units, good strategic access and relative proximity to Norwich. As such, the site is likely to see continued interest with low vacancy rates suggesting a need for further development to accommodate occupiers with similar floorspace needs to those existing.</p> <p>The adjacent allocated site B A10/GT16 is proposed for development and amounts to approximately 300 ha which will provide a mix of residential and B-class uses. Forming the North Rackheath Masterplan, B-class use will be located on the periphery of existing sites and with an aim to form site extensions. The existing site and those in the locality should be retained in line with the strategic importance identified in the DM DPD E1 and as part of the proposed masterplan. This will aid to accommodate need for increased capacity as identified in the 2016 Site Allocations DPD, 2015/16 JCS Annual Monitoring Report, and Rackheath Masterplan.</p>

Figure 15: Rackheath Industrial Estate



Source: Broadland District Council and GVA, 2017

Figure 16: Rackheath Masterplan



Source: Broadland District Council, 2017

Figure 17: Rackheath Industrial Estate Site Photos



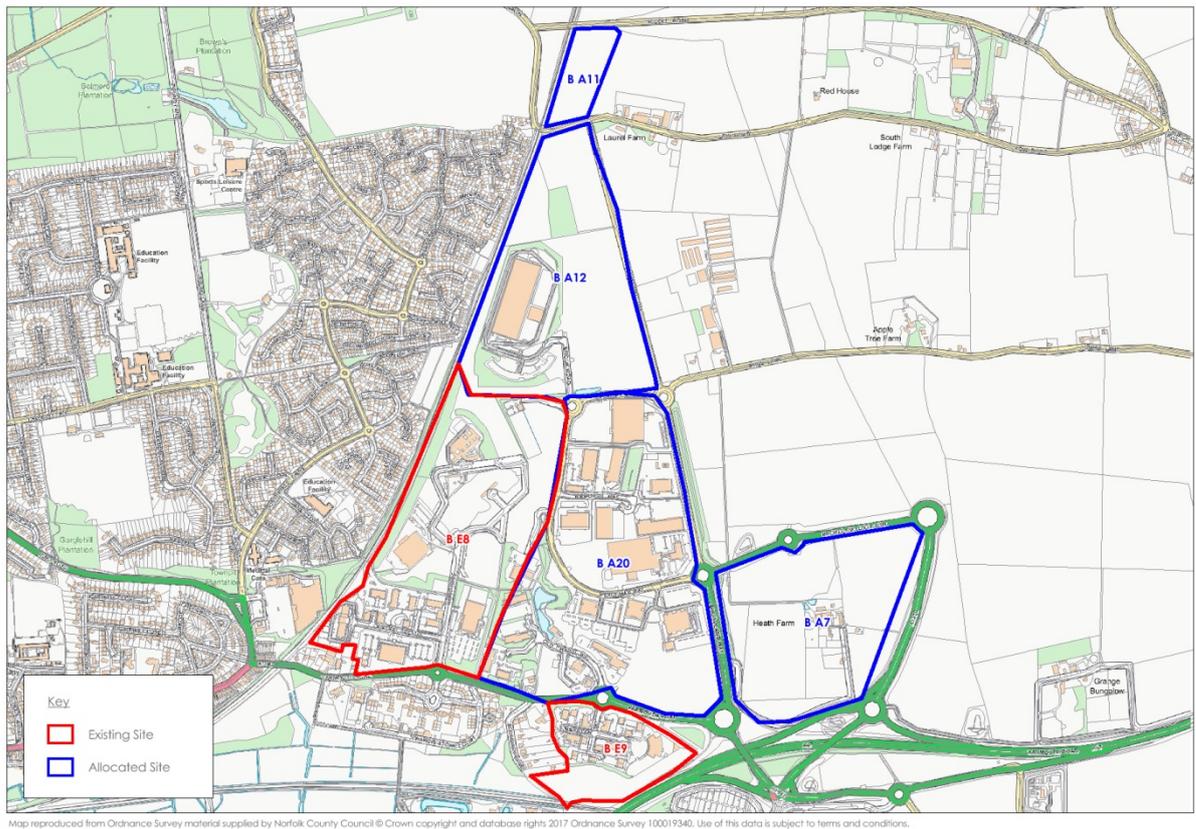
Source: Google Maps, 2017

### Broadland Business Park

Site	Broadland Business Park
<b>Site Reference</b>	GVA Ref: B E8; LA Ref: TSA(a)
<b>Overview</b>	<p>The Broadland Business Park, shown in Figure 18, is located on the eastern fringe of Norwich, 4.5km from the city centre. The site is set across 99.6ha and is best described as a high quality business park on the urban fringe. The site is considered a strategic employment site under policy E1 of the Broadland Development management DPD and includes B A12/B A20 (GT9 a/b) which were allocated and have since been occupied and redesignated as per the 2015/16 JCS Annual Monitoring Report. The site also borders the B A7/GT10 allocated site which the 2015/16 AMR identifies as having outline permission for mixed use works that have yet to be implemented.</p> <p>The site has good internal circulation, parking and access which results from dedicated road works that were planned prior to the delivery of sites. These road works frame the bringing forward of sites and will facilitate expansion and the quick delivery of allocated sites such as B A7/GT10 to the east of the existing site.</p>
<b>Existing Occupiers</b>	<p>The mix of B-class uses on the site includes office and industrial uses and accommodates businesses from a range of sectors such as IT, financial consulting, logistics, wholesale, restaurants, healthcare, government, housing and building, retail banking, retail, business services, printing, and oil and gas. A snapshot of occupiers includes Aviva, Makro, Lovewell Blake, House Exchange, Brewers Fayre, Norwich Audi, St John Ambulance, Almary</p>

Site	Broadland Business Park
	Green Investments, Rossi Long Consulting, Computer Service Centre, Ashtons Legal Solicitors, Costa, Bannatyne Health Club, NorseCare, Circle Housing Group, Archant Print, Menzies Distributions, and Yodel. Including household names such as Aviva, these uses are some of the highest value in Greater Norwich with a collection of occupiers operating in high value added sectors at a national scale.
<b>Connections</b>	The site is well connected to the strategic road network via the A47 which passes to the south of the site and forms one of the primary trunk routes in the region. The Northern Distributor Road (NDR), which is expected to be completed in 2017/18, will also further improve the connectivity of the site with locations to the north of Norwich. The site is accessible via public transport with several bus routes passing on the A1042. As a fringe location the site has relatively poor access to city centre amenities but a range of services are available on and bordering the site.
<b>Stock Quality</b>	Buildings within the site are high quality with large floorplates, as shown in Figure 19, and reflect the recent creation of the Broadland Business Park and the intention to attract high value occupiers. Smaller office units are located to the south of the site and larger industrial and wholesale units are located towards the north. According to CoStar, the floorspace vacancy rate has fallen from 2% to 0% over the last five years, which illustrates the high level of demand. This level of demand supports the delivery of sites such as B A7/GT10, which has been approved with planning permission, and B A11 to the north.
<b>Potential</b>	As a large and now established site, the location is well suited for its current use with high quality units, good strategic access and a range of amenities. The site is likely to see continued interest with low vacancy rates that underpins a need for further development to accommodate occupiers with similar floorspace requirements to those existing. The adjacent allocated site B A7/GT10 has permission for development and further allocated sites to the north may also accommodate development. As such, the existing site should be retained in line with the strategic importance identified in the DM DPD E1 and that the adjoining allocated site should come forward for development as permitted to accommodate need for increased capacity also identified in the 2016 Site Allocations DPD and 2015/16 JCS Annual Monitoring Report.

Figure 18: Broadland Business Park



Source: Broadland District Council and GVA, 2017

Figure 19: Broadland Business Park Site Photos



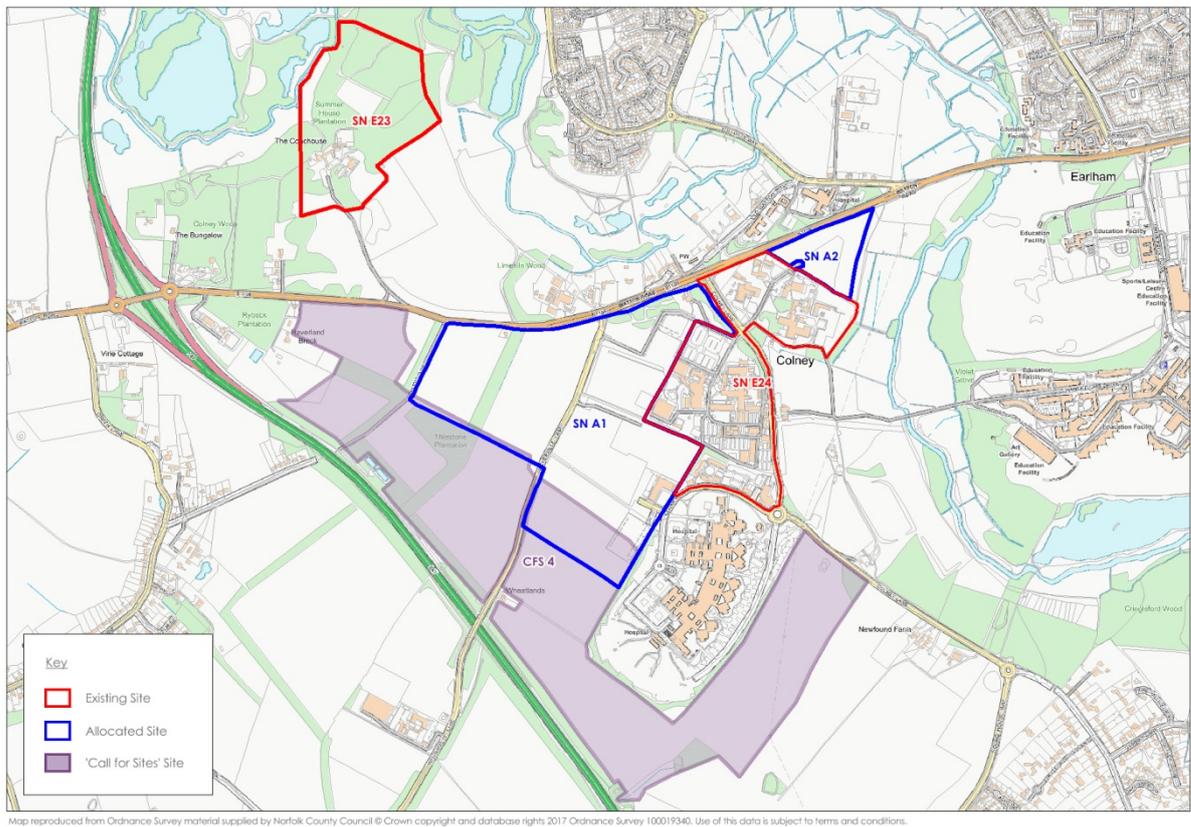
Source: Google Maps, 2017

## Norwich Research Park

Site	Norwich Research Park
<b>Site Reference</b>	GVA Ref: SN E24; LA Ref: -
<b>Overview</b>	<p>The Norwich Research Park, shown in Figure 20, is located on the western fringe of Norwich, 5km from the city centre. The site has an area of 20.7ha and is best described as a high quality research and science on the urban fringe. The site is considered a strategic employment site under policy 9 of the Joint Core Strategy. The site also borders the SN A1/Col 1 and SN A2/Col2 allocated sites which the South Norfolk Local Plan has identified for B1(b) use.</p> <p>The site has good internal circulation, parking and access which is supported by the requirement for good access and parking for the hospital. Good circulation and access will facilitate the delivery of the neighbouring allocated sites, which also have the potential to be accessed directly from Watton Road.</p>
<b>Existing Occupiers</b>	<p>The existing site is predominantly B1(b) use with sectors including health care, food and Health Research, education, and electronics. A snapshot of occupiers includes Norfolk and Norwich University Hospitals, Bob Champion Research Enterprise (BCRE), John Innes Centre, Earlham Institute (EI), Plant Bioscience, NBI Partnership, Global Components &amp; Tooling Corporation, Quadram Institute, Fresca, and Café Pure. Much of the research that is undertaken at the Norwich Research Park is world renowned and the site attracts scientists from an international catchment as one of the leading centres for food and health research. As such, the site makes significant contributions to the local economy and the reputation of Norwich.</p>
<b>Connections</b>	<p>The site is well connected to the strategic road network via the A47 which passes to the west of the site and forms one of the primary trunk routes in the region. The Northern Distributor Road (NDR), which is expected to be completed in 2017/18, will also further improve the connectivity to locations to the north of Norwich. The site is accessible via public transport with several bus routes passing into the site via Watton Road and Colney Lane. As a fringe location the site has relatively poor access to city centre amenities but a small collection of services are available on and near the site.</p>
<b>Stock Quality</b>	<p>Buildings within the site are high quality with large floorplates and typically single B1(b) class uses, as shown in Figure 21, which reflects the recent establishing of the Research Park and the intention to attract high value occupiers. The Norfolk and Norwich University Hospitals are located to the south and more research related B1(b) uses are located towards the north. Demand for floorspace in the Norwich Research Park is high with development overspilling into the adjacent SN A1 allocated site. As such, the existing level of demand supports the delivery of the adjacent SN A1 and SN A2 sites alongside the large call for site CFS 4.</p>

Site	Norwich Research Park
<b>Potential</b>	<p>As a large and now established site, the location is well suited for its current use with high quality units, good strategic access and proximity to the University of East Anglia. The site is likely to see continued interest with low vacancy rates that underpins a need for further development to accommodate occupiers with similar B1(b) class use and floorspace requirements to those existing. The adjacent allocated sites are likely to accommodate this growth and a call for sites suggests there may be additional land to the south and west. As such, the existing site should be retained in line with the strategic importance identified in policy 9 of the JCS and that the adjoining allocated site should come forward for development as intended in the South Norfolk Local Plan.</p>

Figure 20: Norwich Research Park



Source: South Norfolk District Council and GVA, 2017

Figure 21: Norwich Research Park Site Photos



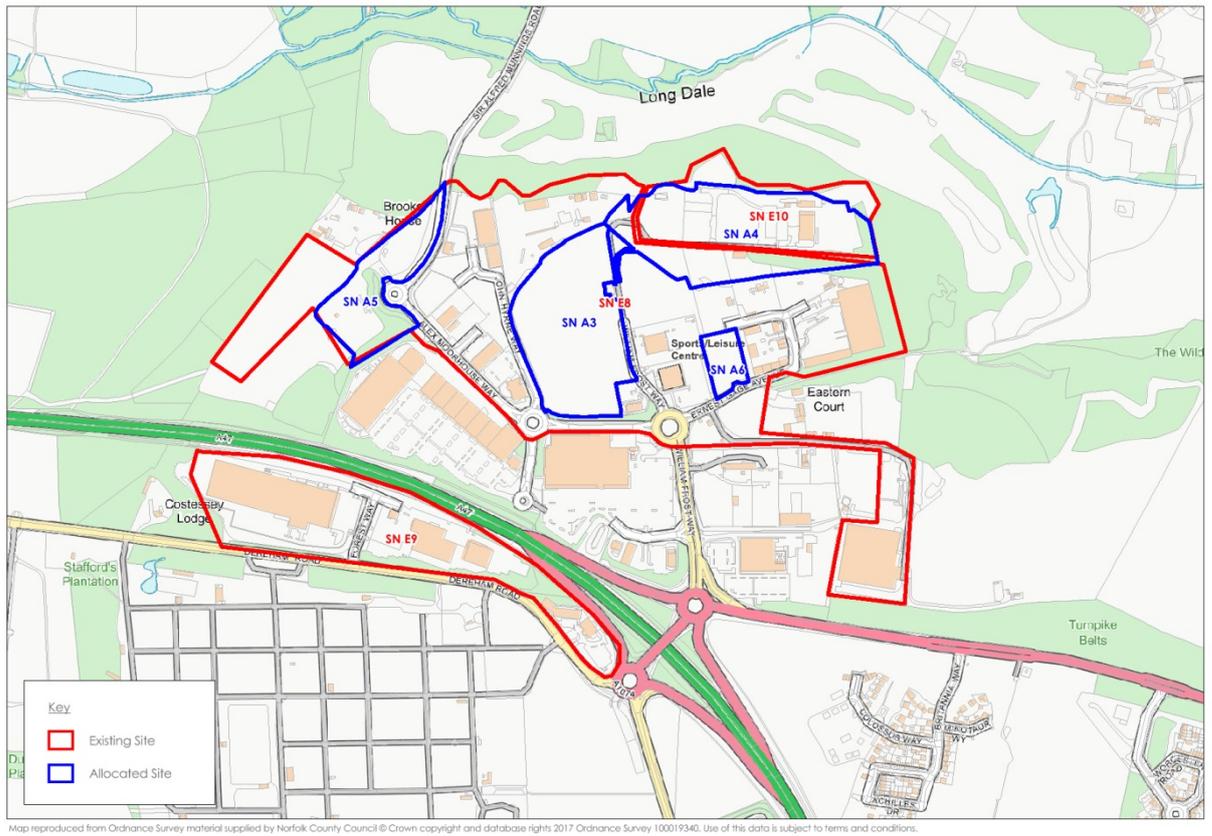
Source: Google Maps, 2017

### Longwater Employment Area

Site	Longwater Employment Area
<b>Site Reference</b>	GVA Ref: SN E8; LA Ref: COS 3
<b>Overview</b>	<p>The Longwater Employment Area, shown in Figure 22, is located to the north west of Norwich, approximately 8km from the city centre. The site has an area of 40.1ha and is best described as a general industry/business area with a significant presence of retail and open storage. The site is identified for B class uses in the South Norfolk Local Plan alongside the SN A3/SN A4/SN A5/SN A6 (COS 3) allocated sites.</p> <p>The site has good internal circulation, parking and access which supports existing storage and distribution uses with HGV traffic. The internal road network is already in place to support the delivery of allocated sites within the employment area.</p>
<b>Existing Occupiers</b>	<p>The existing site is predominantly B8 use with sectors including open storage, distribution, security, retail, restaurants, builders merchants, and food. A snapshot of occupiers includes Pasta Foods Ltd, Cooper BMW, Cooper MINI, Next, Pizza Hut, Argos, KFC, Bannatyne Health Club, Next, Longwater Gravel, Norfolk Canoes, Breedon Aggregates, Lindab, FCC Environment, Norfolk Cement and Building Supplies, Scott Sheds, Morelli Group, Dardan Security. Existing uses on the site have mixed value and typically serve sub-regional markets. The emphasis in the South Norfolk Local Plan is to improve these with a focus on B1, B2, and B8 uses.</p>

Site	Longwater Employment Area
<b>Connections</b>	The site is well connected to the strategic road network via the A47 which passes to the south of the site and forms one of the primary trunk routes in the region. The Northern Distributor Road (NDR), which is expected to be completed in 2017/18, will also further improve connectivity to the site from north Norwich. The site is accessible via public transport with several bus routes passing into the site via Dereham Road. As a fringe location the site has relatively poor access to city centre amenities but there several services, predominantly restaurants and retail, on site.
<b>Stock Quality</b>	Buildings within the site have predominantly large floorplates with industrial or large retail uses, as shown in Figure 23, which reflects more historic storage uses that have been followed by retail and restaurants as a result of the location forming the entry into Norwich on the A47 from the east. Restaurant and retail uses are clustered in proximity to the entrance to the site and storage and other industrial uses are set further back. According to CoStar, the floorspace vacancy rate remained at 0% over the last five years, which illustrates the high level of demand. This level of demand supports the delivery of the allocated sites that are set amongst the wider employment area.
<b>Potential</b>	As a large and established site, the location is well suited for its current use with good strategic access on the junction that forms the eastern entrance into Norwich. The site is likely to see continued interest with low vacancy rates that underpins a need for further development to accommodate further occupiers. The allocated sites set within the wider Longwater employment area are well positioned to accommodate such development. However, the South Norfolk Local Plan sets out aspirations for high value B class uses on the site and this needs to be achieved to optimise the location. As such, the existing site should be retained in line with the South Norfolk Local Plan and the allocated sites should come forward for development yet these should be delivered with a mind to attract B-class uses and resist further retail and restaurant uses.

Figure 22: Longwater Employment Area



Source: South Norfolk District Council and GVA, 2017

Figure 23: Longwater Employment Area Site Photos



Source: Google Maps, 2017

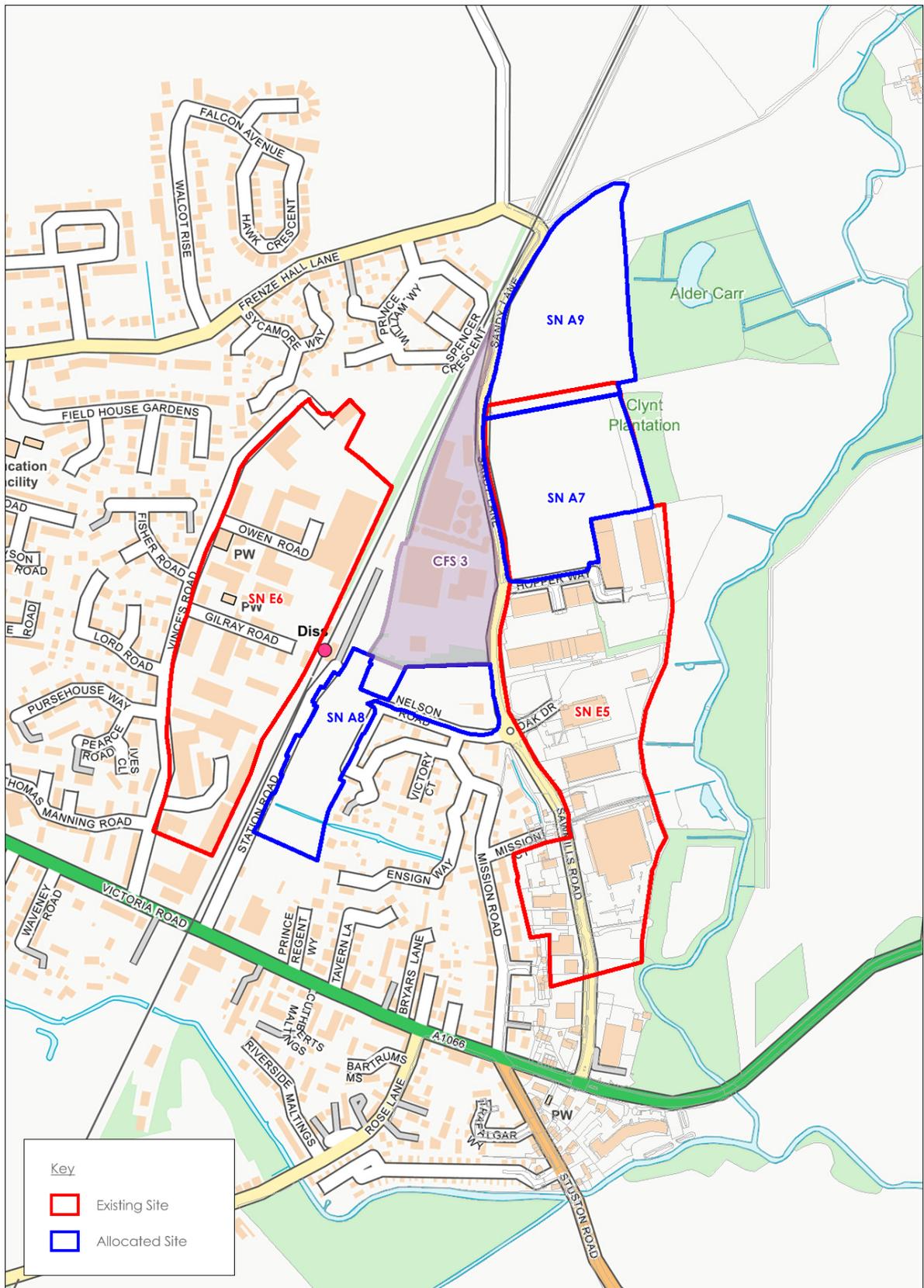
## SN E5/6 Diss Employment Area

Site	Diss Employment Area
<b>Site Reference</b>	GVA Ref: SN E5/6; LA Ref: -
<b>Overview</b>	<p>The Diss Employment Area, shown in Figure 24, is located on the eastern fringe of the town of Diss which lies towards the south of South Norfolk. The sites has an area of 22.5ha and is best described as a general industry/business area on the urban fringe. The site is identified in the South Norfolk Local Plan and neighbours the SN A7/DIS 10, SN A8/DIS 8, and SN A9/DIS 9 which are identified for develop in the South Norfolk Local Plan and supported in the JCS under policies 5 and 13.</p> <p>The two sites that form the Diss Employment Area have good internal circulation, parking and access which has supported recent development. The internal road network is already in place to support the delivery of allocated sites within the employment area.</p>
<b>Existing Occupiers</b>	<p>The existing site is a mix of b-class uses with sectors including distribution, security, automotive hire and repair, building merchants and services, pharmaceuticals, product manufacturing, electronics, head office, and printers. A snapshot of occupiers includes Midwich Distribution and Security, CVS (UK), Animed Direct, D S C Motor Factors, bf1systems, Striptees, Diss Christian Community Church, Gas Arc Group, Merit Plastic Mouldings, Barric, Howdens Joinery, Simonds of Botesdale, Monsters Lrd, Syne qua non, and Glazing Vision. These uses are mixed in their value and reflect the distance of the town from other centres which might otherwise encourage more specialisation on the site. The site caters to local and sub-regional markets and provides a key employment location.</p>
<b>Connections</b>	<p>The site is well connected to the strategic road network via the A1066 which passes to the south of the site and joins the A140 to the east. The site is accessible via public transport with several bus routes passing on the A1066. Regarding amenities, there are some services located to the south of the site on the A1066 and Diss town centre is located within 1.5km.</p>
<b>Stock Quality</b>	<p>Buildings within the site are a mix of sizes and uses, as shown in Figure 25, which reflects the distance of Diss from other large centres and a lack of site specialisation. The two sites are similar without any particular clustering of uses or unit sizes within the sites, allowing their combined analysis. According to CoStar, the floorspace vacancy rate has fallen from 10% to 0% over the last five years, which illustrates the high level of demand. This level of demand supports the delivery of the allocated sites that neighbour the employment area.</p>
<b>Potential</b>	<p>As a large and established site, the location is well suited for its current use with good strategic access, a mix of sites, and proximity to a range of amenities. The site is likely to see continued interest with low vacancy rates that underpins a need for further development to accommodate expansion and new occupiers. The allocated sites that neighbour the Diss</p>

---

Site	Diss Employment Area
	employment area are well positioned to accommodate such development. Further, the Frontier Agriculture site has been identified within the call for sites and may promise additional development opportunity in the future. Overall, the existing site should be retained in line with the South Norfolk Local Plan and the allocated sites should come forward for development with uses that reflect the existing.

Figure 24: Diss Employment Area



Map reproduced from Ordnance Survey material supplied by Norfolk County Council © Crown copyright and database rights 2017 Ordnance Survey 100019340. Use of this data is subject to terms and conditions.

Source: South Norfolk District Council and GVA, 2017

Figure 25: Diss Employment Area Site Photos



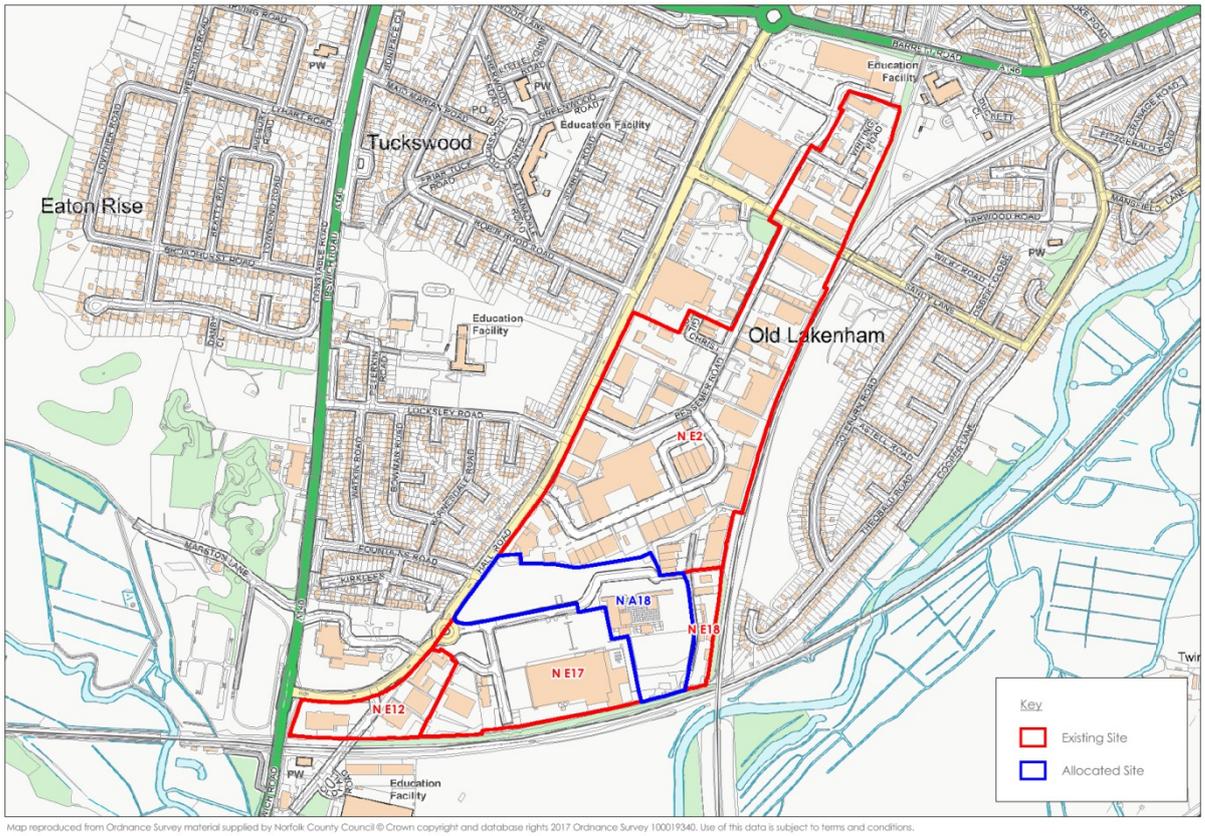
Source: Google Maps, 2017

### Hall Road/Bessemer Road Industrial Estate

Site	The Hall Road/Bessemer Road Industrial Estate
<b>Site Reference</b>	GVA Ref: N E2; LA Ref: DM16(b)
<b>Overview</b>	<p>The Hall Road/Bessemer Road Industrial Estate, shown in Figure 26, is located towards the south of Norwich, approximately 2.5km from the city centre. The site is set across 31ha and constitutes a mixed general industry/business area with some large retail uses. The site is identified in the Norwich Development Management Policies Plan, subject to policy DM16, and includes the N A18 allocated site (The Neatmarket) which is identified for employment use in the SAP.</p> <p>The site has good internal circulation, parking and access which has supported recent development such as the new ASDA. The internal road network is well developed and an access has already been created for the delivery of the allocated site.</p>
<b>Existing Occupiers</b>	<p>The existing site is a mix of b-class uses with sectors including Wholesale, retail, automotive sales, hire and repair, builders merchants and supplies, consultancy, IT, and finance. A snapshot of occupiers includes ASDA, B&amp;Q, Cooper Body Centre, Paramount Cars, Jewson, Euro Car Parks, Busseys Peugeot, Electric Center, Screwfix, Howdens Joinery, Gnaw Chocolate, Lafarge Tarmac, , Norwich Livestock Market, Norwich Calor Gas Centre, Virgin Money, Tribal Group, Ingleton Wood LLP, and GML Consulting. These are mixed in their value with uses towards the north of the site including higher value IT and business services and lower value retail, repair and</p>

Site	The Hall Road/Bessemer Road Industrial Estate
	building supplies located to the south.
<b>Connections</b>	The site is well connected to the strategic road network via the Hall Road and A146 which connects the site to the Norwich city centre to the north and the A47 trunk road to the south. The site is accessible via public transport with several bus routes passing on the Hall Road. Regarding amenities, there are some services located on site and in the neighbouring area.
<b>Stock Quality</b>	Buildings within the site are diverse with a mix of sizes and uses, as shown in Figure 27. The site has a cluster of office units to the north, on Whiting Road, and B2, B8 and retail uses are located towards the south of Sandy Lane. According to CoStar, the floorspace vacancy rate has fluctuated around 4% over the last five years, which illustrates the high level of activity on the site. This level of activity supports the delivery of the allocated site that neighbours the estate.
<b>Potential</b>	As a large and established site, the location is well suited for its current use with good strategic access, a diverse range of occupiers, and proximity to a range of amenities. The site is likely to see continued interest with relatively low vacancy rates that would be supported by development to accommodate expansion and new occupiers. The allocated site that falls towards the south of the existing site is well positioned to accommodate such development. Overall, the existing site should be retained in line with the Norwich Development Management Policies Plan and the allocated site should come forward as advised in the SAP.

Figure 26: The Hall Road/Bessemer Road Industrial Estate



Source: Norwich City Council and GVA, 2017

Figure 27: The Hall Road/Bessemer Road Industrial Estate Site Photos

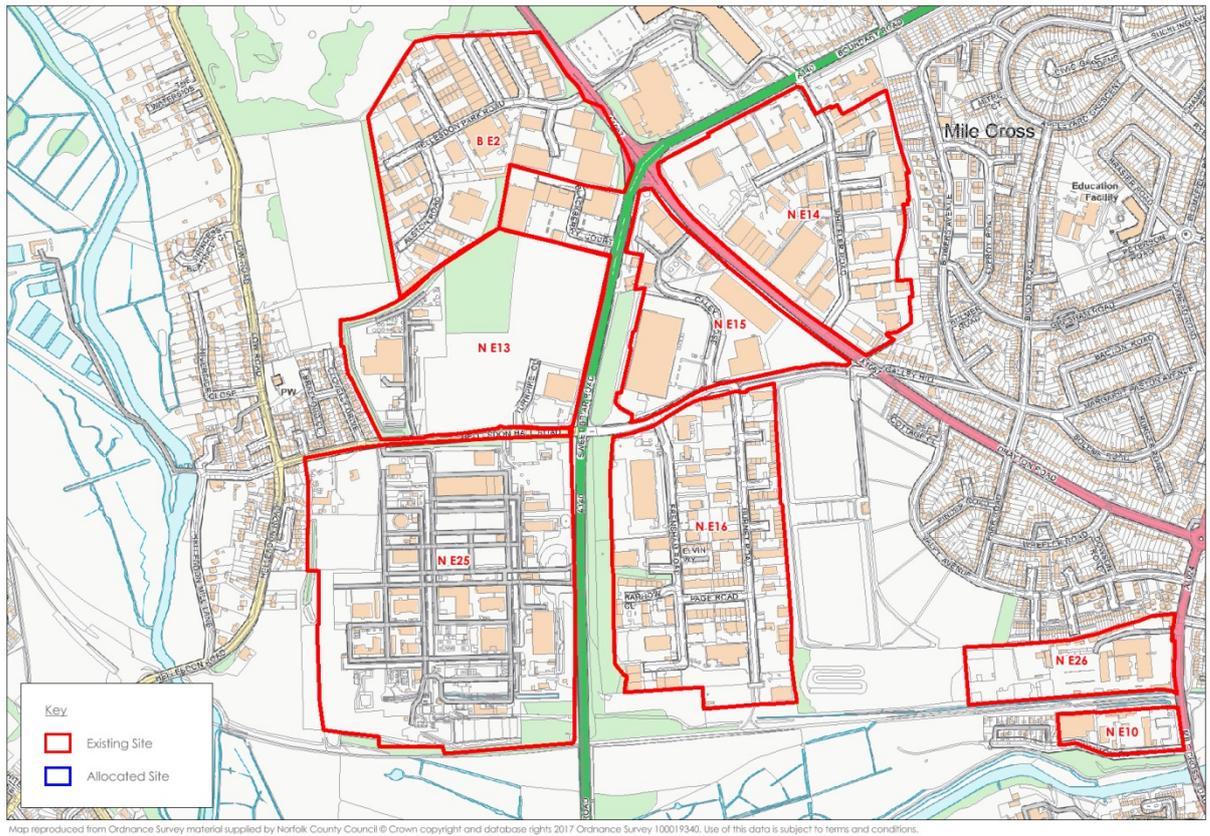


Source: Google Maps, 2017

## Sweet Briar Road Industrial Estate

Site	Sweet Briar Road Industrial Estate
<b>Site Reference</b>	GVA Ref: N E13; LA Ref: DM16 (n)
<b>Overview</b>	The Sweet Briar Road Industrial Estate, shown in Figure 28, is located towards the northwest of Norwich, approximately 3.5km from the city centre. The site is set across 79ha and constitutes a mixed general industry/business area with some large retail uses. The site is identified in the Norwich Development Management Policies Plan, subject to policy DM16, as a strategic employment site.
<b>Existing Occupiers</b>	The existing site is a mix of b-class uses with sectors including retail, wholesale, automotive repair, printing, electronics, chemicals, and building supplies. A snapshot of occupiers includes Briar Chemicals, Porselli, Walker Rubber and Plastics, Gasway Services, Newey & Eyre, VAS Auto Specialist Centre, Burger King, Howdens Joinery, Asda, Micros Components, Saxon Digital Services, Anglian Paint Strippers, and Edmundson Electrical. These use are mixed in their value but predominantly cater to local markets with Briar Chemicals being a distinct exception.
<b>Connections</b>	The site is well connected to the strategic road network via the A140 Sweet Briar Road which forms part of the outer Norwich ring road and intersects with the A1067, providing direct access into the Norwich city centre. The site is accessible via public transport with several bus routes passing on the A140 and A1067. Regarding amenities, there are some services located on site and in the neighbouring area. The site also has good internal circulation, parking and access which will support continued development on the vacant land available.
<b>Stock Quality</b>	Buildings within the site are diverse with a mix of sizes and uses, as shown in Figure 29. Briar Chemicals is located to the southwest of the site and the rest of the site is relatively mixed accept a concentration of car repair businesses to the east/ south east. According to CoStar, the floorspace vacancy rate has fallen from 17% to 1% over the last five years, which illustrates the high level of demand. This level of demand supports continued development for a mix of uses on vacant land to the western edge (N E13 in Figure 28).
<b>Potential</b>	As a large and established site, the location is well suited for its current use with good strategic access, a diverse range of occupiers, and proximity to a range of amenities. The site is likely to see continued interest with low vacancy rates that underpins a need for further development to accommodate expansion and new occupiers. The vacant land within the site is well positioned to accommodate such development. Overall, the existing site should be retained in line with policy DM16 of the Norwich Development Management Policies Plan and vacant land should be considered for the uses it could accommodate.

Figure 28: Sweet Briar Road Industrial Estate



Source: Norwich City Council and GVA, 2017

Figure 29: Sweet Briar Road Industrial Estate Site Photos



Source: Google Maps, 2017

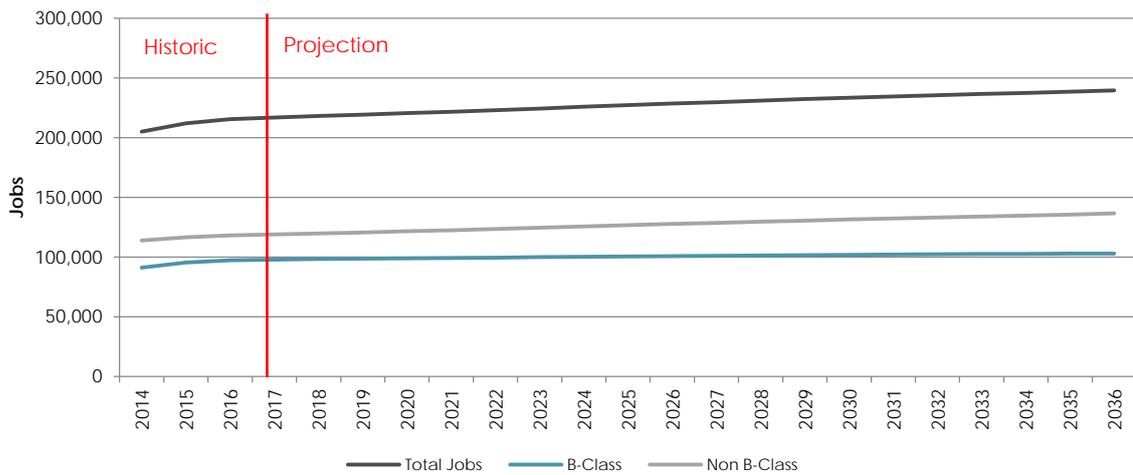
## 4. Base Economic Forecast

- 4.1 This section presents the base economic forecast for Greater Norwich. It is to be noted that while our supply assessment is by individual local authorities, our demand assessment considers forecasting of employment numbers for the Greater Norwich as whole. This is due to the functional nature of the Greater Norwich economy which is much more integrated across the three local authorities.
- 4.2 Our economic baseline and review of supply assets and infrastructure reveals that core, specifically high-value, economic activities in the Greater Norwich extend across the three local authorities, with complex overlaps and influences on each other. The three local authorities are inter-connected in terms of assets, infrastructure and growth locations. Such integrated economic geographies require a strategic approach to economic forecasting, which has demand driven by a complex range and network of factors and that an overarching view is provided for the economic needs. It is also to be noted that the section not only looks at the demand forecasts but also aligns specific sector needs by strategic sites.

### Base Employment Forecast

- 4.3 To determine the base forecast for Greater Norwich, the East England Forecasting Model (EEFM) has been considered. The base EEFM forecasts sets out the 'business as usual' employment growth scenario for Greater Norwich to 2036 across 31 economic sectors, figures are presented as Full Time Equivalent (FTE) to allow for direct translation into floorspace needs. The baseline forecast employment growth would see approximately 34,300 FTE jobs created within Greater Norwich over the Plan Period (2014-2036), an increase of 13%. Most of these jobs growth are forecasted to be in Non-B Class within health and retail activities; the B-class employment is likely to increase by 12% between 2014 and 2036.

Figure 30: EEFM Forecasts for Jobs Growth in Greater Norwich

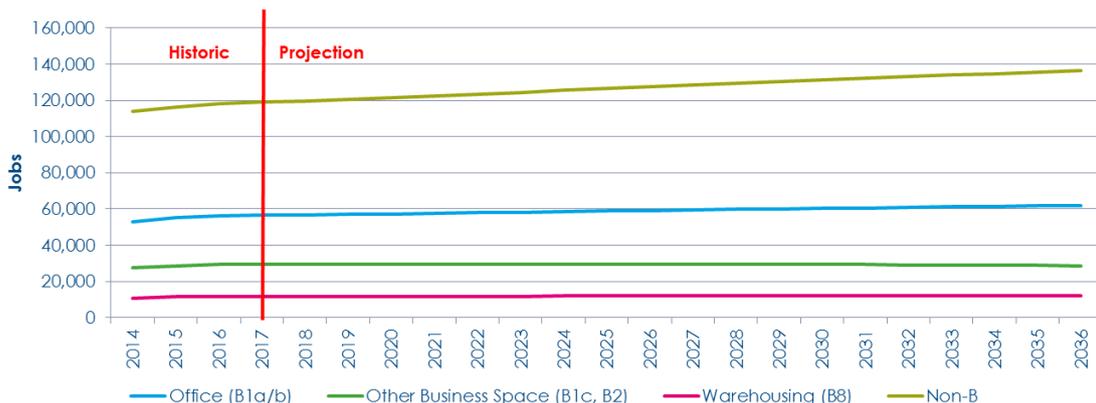


Source: EEFM, GVA, 2017

4.4 Translating this growth at a sector level in to major use categories for planning purposes shows that the highest level of growth proportionally (18%) is within office (B1a) activity, representing a significant 9,250 FTE jobs of increase. This is followed by warehousing (B8) activity, reflecting 13% increase in floorspace and over 1,300 jobs.

4.5 The largest number of FTE jobs will be delivered within ‘non-B class’ activities (such as retail and healthcare) and would provide over 22,600 jobs. This is an increase of 20% and represents almost 66% of the total jobs growth within Greater Norwich. The results of the forecast are shown in Figure 31.

Figure 31: Base Forecast Employment Growth, Greater Norwich



Source: EEFM, GVA, 2017

4.6 Within ‘B class’ activities the base forecast shows an increase in office based employment activities (18%), a 13% increase in warehouse and storage employment, and a small increase in employment in light industrial and manufacturing space (4%). Whilst warehouse-based employment shows a proportional growth to the office sector it is worth noting that this is from a low base and actual jobs numbers are significantly lower than office employment.

- 4.7 As discussed previously these results are predicated on a combination of historic performance and national sector trends, alternate growth scenarios that draw on local characteristics are considered later in this section.
- 4.8 The base forecast shows a strong basis for employment growth within B1a/b use classes suggesting significant potential to accommodate increased levels of knowledge based activity within the area in the future. This level of growth is primarily driven by the Professional Services sector (which includes scientific research and development activity) and ICT (which includes software development) alongside some further growth in the 'creative industries'. This suggests that the role of Higher and Further Education institutions within Greater Norwich will be critical to realising this growth potential.
- 4.9 Using the employment density assumptions detailed earlier in this chapter, these job creation forecasts are translated into additional floorspace requirements, as shown in Table 39. Without making any allowances for windfall losses or churn, the base forecast estimates the following additional demand for floorspace and land from 2014 – 2036. As a base model we use the following employment densities, which are based on our understanding of the nature of economic activity within (and likely to be attracted) to the area, the subsequent occupier requirements within these activities, and the guidance provided by the HCA Density Guide Second Edition, 2015:
- B1a/b – 12 square metres per employee (NIA);
  - B1c/B2 – 36 square metres per employee (GIA); and
  - B8 – 70 square metres per employee (GEA).

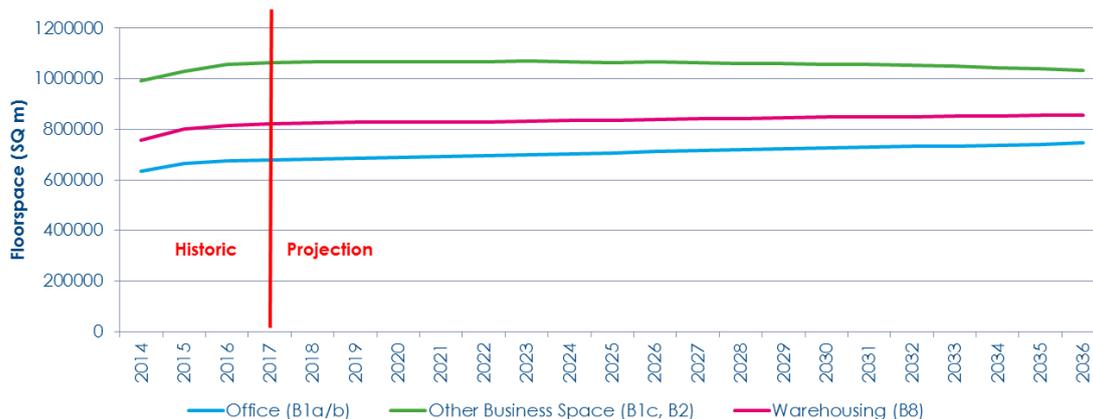
Table 38: Greater Norwich- Baseline EEFM Floorspace Needs Forecast – B Class Jobs

	Employment (Nos.)	Floorspace Demand, 2014-2036 (Sqm)	Land Demand 2016-2036 (Ha)
Office (B1a/b)	9,250	110,998	11
Other Business Space (B1c, B2)	1,118	40,264	10
Warehousing (B8)	1,394	97,614	24
<b>Total</b>	<b>11,762</b>	<b>248,876</b>	<b>46</b>

Source: EEFM, GVA, 2017

Note: All figures represent number of FTE jobs and are considered 'minimums' based on economic projections.

Figure 32: Greater Norwich- Baseline EEFM Floorspace Needs Forecast



4.10 The base forecast shows an estimates additional demand to 2036 of:

- 110,990 sqm of B1a/b floorspace;
- 40,260 sqm of B1c/B2 floorspace; and
- 97,600 sqm of B8 floorspace.

### Contingency Allowance and Market 'Churn'

5.1 In order for future employment forecasts to be based on more than economic growth 'predictions' and to better reflect the fluid nature of land allocations, the forecasting models makes two 'additional allowances'.

5.2 Firstly, a contingency allowance is made which takes into account the fact that a proportion of designated employment land will not be entirely used by B-Use-Class employment. Land uses such as: recycling, waste management, combined heat and power plants and bus depots can, under certain circumstances and where appropriate, be located on employment land.

5.3 A significant part of the projected employment growth also arises from sectors which have traditionally not been located on B Class employment land such as healthcare, education, hotels and leisure.

5.4 Under specific circumstances and where appropriate, employment land might also be used as part of a more mixed-use scheme which would enable employment development to come forward on a proportion of it.

5.5 Further, with the extension of Permitted Development Rights making the conversion of office premises to residential use more straightforward, there is the potential for an increase in the unexpected loss of employment floorspace, although much of this is captured within the data.

- 5.6 To estimate the amount of land that may be used for non-B class activities, historic net losses of employment land to other uses such as housing and leisure as reported in the Greater Norwich Annual Monitoring Report 2015/16 has been used.
- 5.7 It is important that only land that is truly lost to B Class employment activity is included within the Windfall allowance rather than land which is transferred between B class land uses (i.e. land that changes from B2 activity to B8). To provide this estimate we have utilised the 'net' change from the AMR. Where the net change has been negative (i.e. floorspace lost is greater than floorspace gained) we have included these in the Windfall estimate, where the opposite is true these are included within the 'Churn' allowance.

Table 39: Allowance for Windfall Losses

	Office (sqm)	Industrial (sqm)	Warehouse (sqm)
2015/16	-	-	-
2014/15	30,694	-	-
2013/14	-	-	-
2012/13	-	-	-
2011/12	-	-	-
2010/11	-	-	-
<b>Average Annual Loss</b>	<b>5,116</b>	<b>0</b>	<b>0</b>

Source: Greater Norwich Annual Monitoring Reports, 2015/16

- 5.8 As shown above there have been no 'net' losses of employment space within Greater Norwich in most years to other uses ("Windfall Losses"). The exception is 2014/15 when considerable office stock was lost, largely within the City area. However, it should be noted that this headline masks a divergent trend at the local authority level, with the City experiencing ongoing losses of space, which have broadly been offset by gains in South Norfolk and Broadland.
- 5.9 Taking the average loss of space over the period considered and projecting this average rate forward over the Plan Period we have identified an allowance for windfall of circa 115,545 sqm of floorspace.
- 5.10 This approach has its limitations, principally because it is backward looking and does not pick up future changes to how land will be used. This data is still used, however, with the proviso that it should be monitored each year and new figures considered to give a longer term projection of losses of employment land. This could have a considerable effect on future employment land needs, depending on employment land losses in each year.
- 5.11 As well as making an allowance for unexpected losses of employment land, allowance is made for the fact that locational and premises needs of businesses change over time. This requires businesses to move. In other instances an existing business might cease its operations and a new business take over a site for redevelopment. For this to happen smoothly there is a

need for certain level of available vacant land. This type of demand has been called 'churn' demand or 'frictional vacancy'.

- 5.12 An allowance for 'churn' is calculated from the average annual construction rate of space within the area as recorded within the Annual Monitoring Report, as noted above this includes data for years where there has been a net increase in floorspace. The net annual 'gain' is shown below.

Table 40: Allowance for Windfall Losses

	Office (sqm)	Industrial (sqm)	Warehouse (sqm)
2015/16	26,627	2035	13194
2014/15	-	724	2035
2013/14	46,639	33,243	35,021
2012/13	-	-	-
2011/12	8,525	10,907	7,482
2010/11	-	-	-
<b>Average Annual Loss</b>	<b>27,264</b>	<b>11,727</b>	<b>14,433</b>

Source: Greater Norwich Annual Monitoring Reports, 2015/16

- 5.13 It typically takes two years to achieve a planning consent, site preparation and construction after a site has changed hands. For these reasons the annual net take-up of employment floorspace is multiplied by two to estimate the churn demand. This is, in effect, an allowance for the necessary frictional vacancy to allow the market and relocation chains to operate.
- 5.14 This allowance for churn, allows the commercial property market realities to be added to the baseline economic forecast.

## 5. Alternative Growth Scenario

- 5.1 This Study undertakes detailed economic forecasting for each of the three Greater Norwich local authorities, Broadland, Norwich and South Norfolk, in order to understand future employment growth in Greater Norwich. The approach used identified a base economic forecast (set out above) to understand 'business as usual' however given the nature of the Greater Norwich economy it is unlikely 'business as usual' will be a true reflection of the future economy – as such an alternative growth scenario is required.
- 5.2 The alternative growth scenario developed builds upon our understanding of past economic performance, the strengths and weaknesses of the local economies, factors expected to influence future growth, and the wider macro-economic context for key economic sectors. Its production provides a conjoined growth position that is linked to the economic 'strategy' that is emerging for Greater Norwich in terms of the mix and focus of sector activity. As such, alongside wider economic development initiatives, it supports any future planning policy decisions taken to align with the wider economic growth agenda.
- 5.3 To understand the range and portfolio of future employment land and floorspace need, it is important to understand the potential nature of employment growth within Greater Norwich, and specifically within each of the three local authority areas, to ensure sufficient provision is made and protected through existing and potential employment sites across Greater Norwich.
- 5.4 This facilitates the quantitative assessment of the alignment between employment land supply and the range of projected future demand, which will inform the conclusions and recommendations of this study. It provides a robust understanding of the required approach towards managing each of the local authorities' employment land portfolios in a way that supports appropriate future economic growth across Greater Norwich. This is also supported by qualitative assessment of the requirements of employment land to meet the needs of expected future economic growth.

## Greater Norwich: Economic Strengths

- 5.5 Based on the socio-economic analysis undertaken at the Greater Norwich wide and local authority, which forms the baseline understanding for this Study, a number of key economic strengths have been identified. These strengths underpin future opportunities, suggesting that the following sector-specific employment activity could drive future economic growth across the Greater Norwich sub-region, and within some or all of the three authority areas.
- 5.6 Under this section we have considered the key locational drivers, number of employees and employment trends in the last five years. It is critical that the understanding of future growth is aligned to how the sectors themselves act, which to a large degree in Norwich reflects the 'agglomeration' or clustering approach to growth. Most growth sectors seek close proximity both between businesses and other institutional anchors, such as High Education or research facilities, in order to benefit from shared knowledge and skills.
- 5.7 In the Greater Norwich context much of this agglomeration is focussed on the Norwich Policy Area (NPA) reflecting the fact most businesses are seeking to locate within, or on the edges of the city or along the main infrastructure corridors that link it to other major economic hubs. To provide consistency across the evidence base and alignment in understanding the local economy we have drawn on our knowledge of the NPA and analysis completed (in partnership with Hatch) to inform research by Respublica on behalf of the City Council.

## Knowledge based Sectors

- 5.8 Greater Norwich has an internationally recognised cluster of knowledge-based activities, anchored by the UEA and its linked research facilities, major international businesses (such as Lotus) and its connectivity via the Airport. These provide a platform for growth which may differ from business as usual.

## Life Sciences, Health and Food/ Agri Tech.

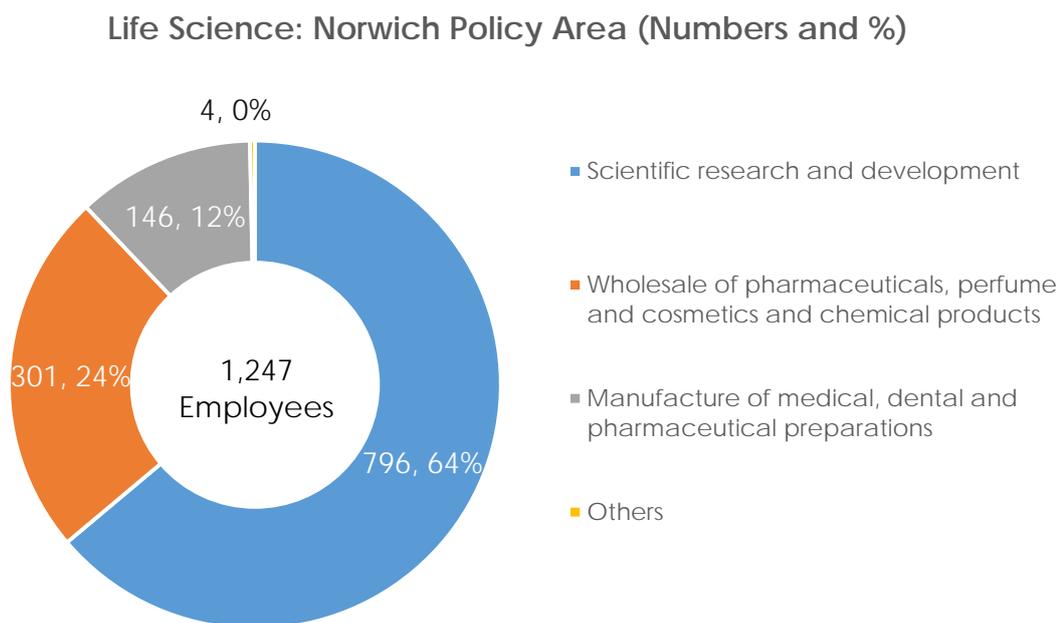
- 5.9 Norwich Research Park is home for a number of world class researches, educational and training institutions including the John Innes Centre, Institute of Food Research, The Earlham Institute, the University of East Anglia, and Norfolk and Norwich University Hospital with their associated infrastructure and specialist facilities.
- 5.10 Research, education and training activities on the Norwich Research Park are currently complemented by business support functions within the individual institutions and the facilities and services at the Norwich Innovation Centre and Norwich Bio-Incubator as well as a New Enterprise Centre. The Research Park also hosts award winning buildings like the Centrum, which provides office and research spaces for growing companies with flexible lease terms and range of space offers.

Figure 33: Norwich Research Park



- 5.11 Three of the Biotechnology and Biological Science Research Council's eight strategic research institutes are located on the Norwich Research Park. This is reflected in the composition of the sector. The Figure 34 shows employment in the Life Sciences Sector in Norwich Policy Area. It is to be noted that Norwich Policy is used as a proxy for greater Norwich as it covers key economic core across Greater Norwich economic cores.
- 5.12 The data shows that over two thirds of employees (64%, some 800 people) are captured as employed in scientific research and development. This is likely to be a considerable underestimate of Life Science activity much of which is likely to be contained under broader university and hospital codes. The SIC codes therefore offer a fairly blunt assessment of Life Sciences, in reality a large number of support staff are employed by research and/or support companies. The actual number employed in the sector is far greater; as Norwich Research Park alone employs over 2,400 scientists with over 8,500 support staff (parts of the Park fall outside the policy area boundaries).

Figure 34: Employment in Life Science



Source: Hatch and GVA

5.13 In addition, Greater Norwich shows specific specialism in agri-biotech, food and health, genomics, medical-tech and industrial bio-tech. Some of the businesses in the area cover a diverse range of specialisms including:

- food processing technology (Thurne-middleby, a global provider of industrial food processing machines, Frank Dale Foods, the UK's leading premium party food manufacturer)
- chemicals (Briar Chemicals)

### Advanced Manufacturing and Engineering

5.14 The manufacturing and engineering sector has a strong presence across Greater Norwich. Whilst the large scale, traditional manufacturing and production activity once synonymous with Greater Norwich has declined a number of key technology based engineering and manufacturing businesses remain in or have been attracted to the area.

5.15 Some traditional engineering activities can still be found within parts of Greater Norwich but these have been joined by a range of advanced manufacturing and high technology product/systems development businesses with a strong association with the application of digital and computing technology.

5.16 This is a fairly sizeable sector with over 6,600 employees. The largest three sub-sectors (auto, testing and fabricated metal products) account for some 62% of employees.

- 5.17 As a 'snapshot' of the sector locally, key employment sites such as the Hethel Engineering and the Airport cluster as well as small and growing businesses provide a basis for future growth in a range of manufacturing sectors. These are representative of a much larger base of advanced manufacturing businesses and activity within Greater Norwich.
- 5.18 Both the Hethel Engineering and Norwich International Airport have ambitious development plans and between them offer attractive investments and opportunities for advanced engineering, aviation and ancillary businesses.
- 5.19 Following are the key features of these sectors along with the aviation academy.

***Hethel Engineering Centre (HEC):***

- 5.20 The Hethel Engineering Centre (HEC) is a successful and innovative incubation centre dedicated to supporting high performance engineering and manufacturing companies. 20ha of land is available for development as part of HEC's vision to develop a Technology Park and create over 1,000 high skilled jobs.
- 5.21 Home to automotive companies such as Group Lotus, Zenos Cars, Ansible Motion, Pangean Engineering and Tech Mahindra, HEC is also the base for cutting edge businesses working in areas such as food processing and packaging, defence, offshore, agriculture and ICT. It also offers flexible workshop and office space, training, support and shared expertise. Success rates are extremely high with 95% of the companies that have received support still in business after three years, and 88% after five year, well above national averages.
- 5.22 Following a recent 40,000sqft expansion, HEC has the capacity to offer larger workshops and offices as well as virtual / hot desks and small incubation space.
- 5.23 The A11 Growth Corridor Feasibility Study recommends a more joined up approach across the area, with the northern technology growth hub at Hethel linked to the Norwich Research Park, a central technology hub at the planned for Thetford Enterprise Park, and a southern technology growth hub at Kings Warren in Red Lodge, in Suffolk.

***Norwich international Airport:***

- 5.24 Ambitious plans are also underway around Norwich International Airport where 75 ha of land has been earmarked for development to grow the aviation industry and complement existing occupiers including KLM, Bristow, Air Livery and STG Aerospace.
- 5.25 **Norwich AeroPark** saw permission for development on 40 ha of the site and was planned to unlock opportunities for aviation-related industry and other businesses. The proposal has since been postponed with the NDR coming forward but this will aid to meet the original aim of

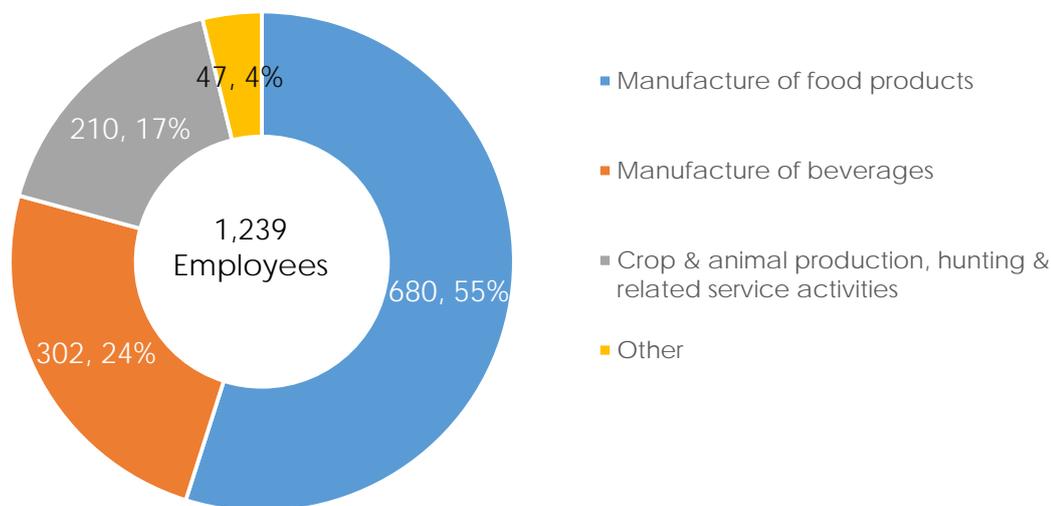
supporting the Airport to becoming a leading centre for aviation support services and in unlocking large sites to support the Airport as an employment location.

- 5.26 A new £13m **Norwich International Aviation Academy** opened in 2017. It is a partnership between Norwich County Council, Norwich City Council, New Anglia Local Enterprise Partnership, Norwich International Airport, KLM UK Engineering Limited, UEA and City College Norwich and will train and develop aviation professionals through a 'real world' learning environment, attracting both local and international students.

***Food Tech and Processing:***

- 5.27 In addition, Food, drink and agriculture are one of major employment sectors in the Greater Norwich, with most of the employment in the broad sector concentrated in the rural Broadland and South Norfolk.
- 5.28 The city actively promotes its Food and Drink Sector. The Norwich Food and Drink Festival attracted over 4,000 people into the city and last year 44 pubs and 39 breweries took part in the ten day city-wide celebration of pubs, breweries and beer in the annual Norwich City of Ale. Norfolk and Suffolk has a Food and Drink Enterprise Zone focusing in part on exploiting the Greater Norwich food cluster.
- 5.29 The sector comprises of two distinct groups: large scale processing companies with a number of national brands having manufacturing activities in the area, and niche, local food and drink producers, who are experiencing fast growth in their businesses.
- 5.30 The Institute of Food Research (IFR) is based at Norwich Research Park. The IFR is the only publicly funded UK research institute that focuses on the underlying science of food and health to address the global challenges of: food security, diet and health, healthy and ageing and food waste.
- 5.31 Further, the Unilever brand Colman's, a producer of mustards and sauces, and the Britvic brand Robinson's soft drinks are based at the Carrow Works site in Norwich.
- 5.32 It should be noted that the sector is defined quite narrowly and excludes those staff employed in bars and restaurants. Looking at the production end official statistics highlight about 1,200 employees over half (55%) of which are involved in food production.

Food and Drink Sector : Norwich Policy Area 2015 (Number, %)



Source: Hatch and GVA

**Cambridge-Norwich Tech Corridor:**

5.33 The Cambridge-Norwich Technology Corridor which stretches between Norwich and Cambridge is expected to become the UK’s newest hotspot for economic growth. It is expected to provide a link between the ambitious partners of the Greater Norwich City Deal- to enable advanced manufacturing, engineering and knowledge based industries to grow and develop to facilitate the continued growth of the Cambridge Phenomenon. The project aims to create 10,000 new jobs, attract £905m of private investment and see up to 20,000 homes built between Norwich and Newmarket by focussing on 11 key areas along the route by 2031.

5.34 Thousands of highly-skilled jobs and more than £500m could be added to the regional economy if a bold vision to create a technology corridor along the A11 gets the go ahead.

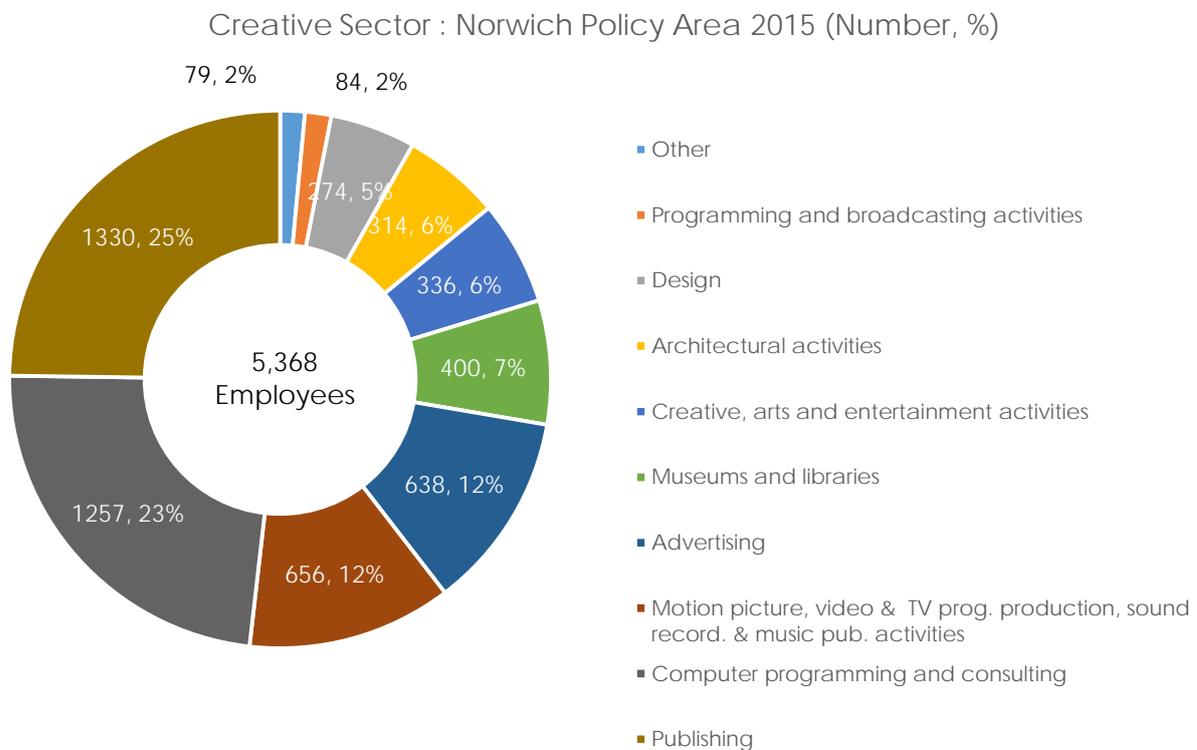
**Digital Cultural and Creative**

5.35 Creative Industries are industries that are based on individual creativity, skill and talent, including publishing, art, all types of design, creative writing, film, broadcasting, fine art, advertising, public relations and marketing. Norwich has recently been highlighted in a national report as hosting one of the UK's most highly concentrated, highly diversified creative industry clusters by NESTA. The Tech Nation report (2016)<sup>1</sup> identifies 1,345 creative businesses employing nearly 7,000 people. The Norwich University of the Arts (NUA), which is home to the Ideas Factory, and EPIC, which combines HD TV studios, incubation space for creative

<sup>1</sup> [http://www.techcityuk.com/wp-content/uploads/2016/02/Tech-Nation-2016\\_FINAL-ONLINE-1.pdf](http://www.techcityuk.com/wp-content/uploads/2016/02/Tech-Nation-2016_FINAL-ONLINE-1.pdf)

businesses and associated facilities, are key assets with the capacity to stimulate further development of the sector.

- 5.36 Norwich is also home to cultural and creative organisations of national importance including the Sainsbury Centre for Visual Arts at the University of East Anglia. The Writers’ Centre in Norwich has an established national reputation and its work has resulted in the City being named as England’s first UNESCO City of Literature. The Theatre Royal in Norwich, home to a range of drama, dance, operatic and musical productions. Norwich University of the Arts has a strong tradition of vocational education in the creative industries with specialities in graphic design and digital content creation.
- 5.37 The Norfolk and Norwich Festival is the fourth largest city festival in the UK Festival. Graphic design and communications agencies are growing in importance in Norwich. The links between digital creative industries and the ICT sector are equally strong and the opportunity to build upon existing clusters of activity in Greater Norwich.
- 5.38 The chart shows there are over 5,300 employees in the creative sector in the NPA. A quarter of these are in publishing reflecting some of the local academic expertise and other writing activities.



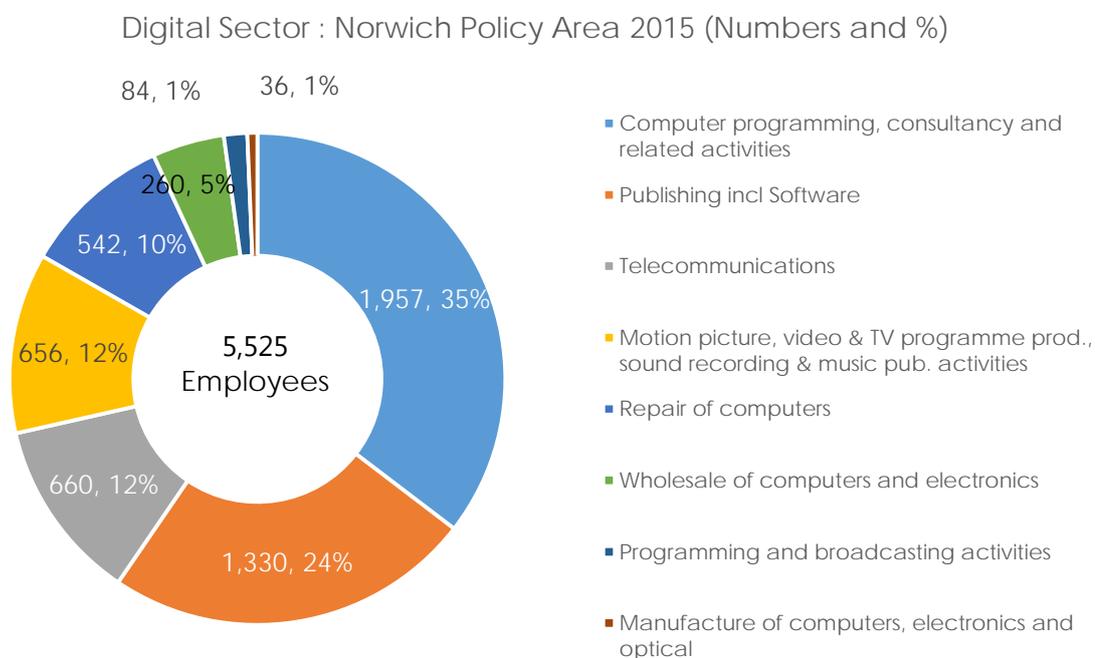
Source: Hatch and GVA

- 5.39 The composition of the Creative Industries sector has evolved with an increased emphasis on digital and computer based industries such as ICT and Digital Creative. The industry is one of

the fastest growing sectors in the UK and a major driver for the economy in East Anglia in general. The digital cultural and creative sector category captures a range of employment activities, which show links with the manufacturing and engineering sector. The potential for this type of activity in Greater Norwich is supported by the drivers for creative production and innovation detailed in the latest Tech Nation report. Most of this growth is focussed in the Norwich urban area and the flourishing cluster of digital creative companies has been recognised as a Tech Cluster.

5.40 The vibrant cluster of digital businesses in Greater Norwich includes companies such as Proxama (worldwide platform provider of mobile contactless payment solutions), Foolproof (Europe’s biggest user experience design specialists) and Further (voted the UK’s number 1 agency for digital strategy and content strategy, 2014). With a strong supply of graduates from the University of East Anglia and Norwich University of the Arts, Norwich has strengths in digital advertising and marketing, telecommunications and networking.

5.41 The chart shows there are over 5,500 employees in the digital sector in the area. Over one third of these (35%) are in computer programming, consultancy and related activities and quarter in publishing including software (24%). Looking at the largest sub-sectors these include computer consultancy and publishing newspapers, journals and periodicals (in part reflecting some of the academic expertise and other writing activities).



Source: Hatch and GVA

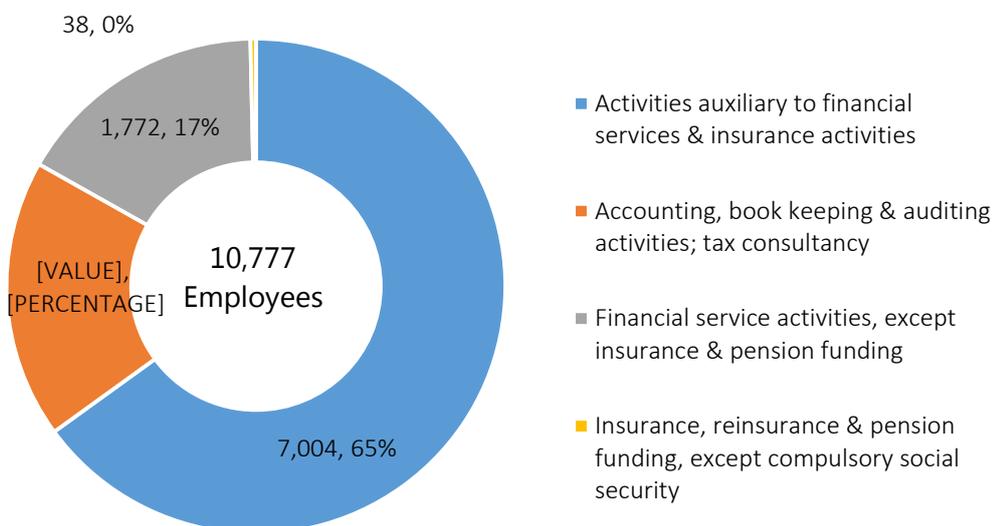
5.42 Many digital tech businesses are international in their outlook: around a third have partners and suppliers in the EU or North America. There are divergences among clusters, however. For

instance, Cambridge and Norwich-based businesses have comparatively greater numbers of partners in North America.

### Finance, Insurance and Professional Services

- 5.43 Norwich is acknowledged as a leading centre in the UK finance and insurance services market. The city has the largest general insurance centre in the UK, with support functions and supply chain companies located throughout the Greater Norwich area. Norwich is home to several large companies including Aviva (previously Norwich Union), Marsh, Virgin Money, Royal Bank of Scotland, Central Trust Capital and Swiss Re. Many of these businesses are investing heavily in financial technology development.
- 5.44 Earlier baseline research shows that the Norwich Urban Area has an industrial concentration of finance and businesses services which is corroborated by findings reported in the Core Strategy. Traditional locations such as the Norwich City Centre and those that continue to provide development opportunities, such as the Broadland Business Park which boasts Aviva as one of its largest occupiers, illustrate this strength.
- 5.45 This is reflected in the composition of the sector. Over two thirds of employees (65%) over 7000 people are employed in activities auxiliary to financial and insurance services activities (though there has been some fluctuation in this sector, see next section).

Financial Services: Norwich Policy Area 2015 (Numbers)



Source: Hatch and GVA

- 5.46 Assets such as the financial skills academy and the University of East Anglia ensure that a pool of young and appropriately qualified workers are located in Norwich who provide a robust base for major companies offering high value jobs. In line with the Core Strategy and earlier

research, there is further scope to increase employment in and the growth of existing companies in addition to attracting further investment and other businesses to locate in the area.

- 5.47 Despite challenges at the national and international for financial and business services, projections suggest that the strength of these industries in Norwich will continue and growth will remain positive over the long term.

## Alternative Demand Forecast

- 5.48 Taking the above analysis into account and having reviewed the policy, market and strategy base for Greater Norwich alongside analysis of the existing employment floorspace and business stock it is clear that the baseline forecast may not truly reflect the economic potential of Greater Norwich in terms of the sectoral composition of growth.
- 5.49 Whilst the base forecast indicates that there are positive growth prospects across the B class uses, with all expected to see some level of employment land requirement over the plan period it is clear that is potentially underplays the area's strength and potential in key sectors, particularly those within the knowledge intensive industries.
- 5.50 As such it is critical that a forecast reflects the potential of these sectors so policy decisions can be made. However it is equally important that it is founded on a clear set of assumptions and evidence that provide confidence in the future.
- 5.51 Therefore to understand the impacts of realising this potential we have developed alternate scenarios that consider different forms and scales of growth in range of knowledge economy related activities. These look at additional growth potential over and above that within the base forecast. The sectors and their growth potential that the alternate scenario involves are:

Sectors	Growth Potential
<b>Research and Development</b>	High
<b>Professional + Business Services + Finance</b>	Moderate to High
<b>Advanced Manufacturing and Engineering</b>	
• Food	Moderate to High
• Electronics	Moderate to High
• Transport Equipment	Moderate to High
<b>ICT</b>	Moderate to High
<b>Creative and Media</b>	Moderate

- 5.52 Based on our research and understanding of the institutional and location drivers presented in this section, we believe that these sectors provide a suitable range of alternative growth patterns in order to shape the future employment growth and the consequent employment floorspace and land requirements that stem from it. The following section presents the scope and prospects of growth of these sectors in Greater Norwich.

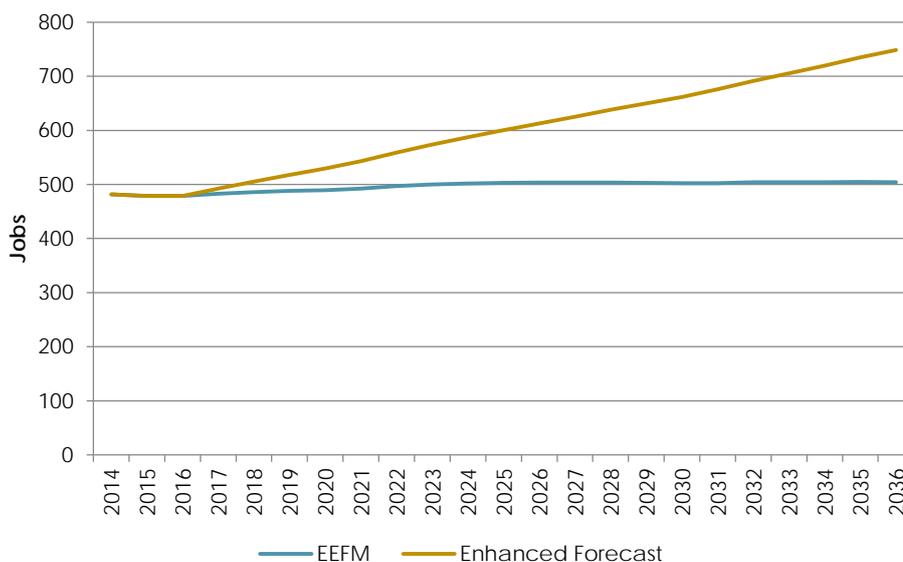
## Forecasting Approach

- 5.53 The institutional and locational drivers in Greater Norwich provide the basis for future growth over and above the 'long term' trend for the area. To understand the potential scale of the opportunity and its implications on land needs we have looked into the national prospects for sector growth.
- 5.54 **Life Sciences:** To understand the impact of growth in Health Research and Life Sciences related employment we have looked into research published by IMS Market Prognosis a leading market forecasting publication that provides insights into the economic and political issues affecting the local pharmaceutical and healthcare industries. According to the research produced by IMS Market Prognosis nationally, the annual average growth rate assumed for Life Sciences is expected to be 4 to 7% per annum between 2014 to 2018.
- 5.55 For incorporating this growth within the base forecasts we have considered the Scientific, Research and Development<sup>2</sup> sector within the EEFM classification, comprising activities such as research and experimental development on biotechnology, natural sciences and engineering.
- 5.56 When looking at the forecasts, EEFM projects a growth of approximately 20 jobs over the next 20 years, which reflects no growth in the sector effectively. However, as explored the evidence suggests that the sector is likely to experience much more positive growth than the baseline numbers. The enhanced forecast below shows that the sector is likely to see an increase of at least 250 jobs over the next 20 years. Most of this growth will be underpinned by major institutional occupiers such as the Norwich Research Park Cluster, Institute of Food Research and Norfolk and Norwich University Hospital Foundation and the University of East Anglia.

---

<sup>2</sup> Related to SIC code 72; reference : [http://atlas.cambridgeshire.gov.uk/EEFM/EEFM\\_2014\\_technical\\_report\\_January2015.pdf](http://atlas.cambridgeshire.gov.uk/EEFM/EEFM_2014_technical_report_January2015.pdf)

Figure 35: Greater Norwich- Forecast for Research and Development Jobs

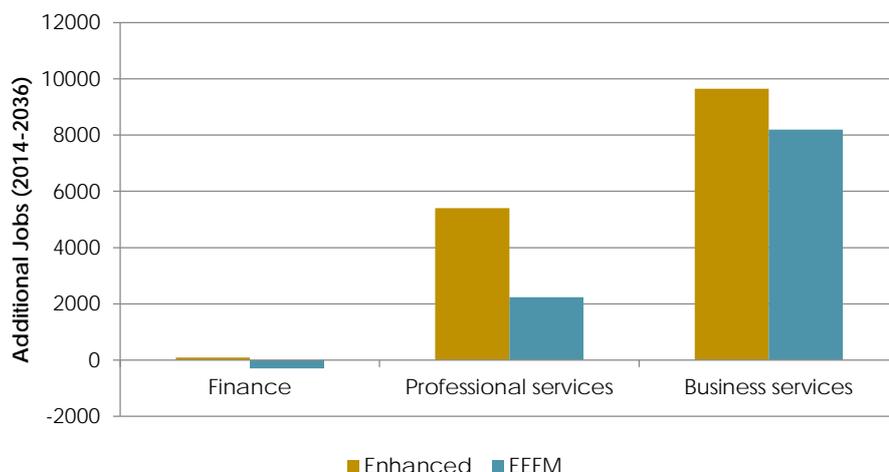


5.57 **Professional, Business and Finance Services:** Professional, Business and Financial Services are a significant sector both in terms of scale and value of employment. Greater Norwich has a higher than average concentration of these jobs and there is a diverse and robust base of major companies hosting high value jobs. According to the EEFM, the sector is likely to see an increase an overall jobs growth of 10,000 jobs over the next 20 years. The business and professional services are likely to see a growth of 0.5% and 1% per annum, whereas the financial services show a negative growth of 0.7% per annum.

5.58 However, according to the industrial strategy report the sector is currently worth around £153 billion, 11% of the total UK economy and is forecasted to grow at a much stronger pace of 4% per annum between the periods of 2012-2021, a cumulative increase of 50% in real terms<sup>3</sup>. To adjust the base forecast we believe that the sector will grow at a more conservative pace in Greater Norwich than nationally, but still great than EEFM, at an average of 1.5% per annum. As shown in the figure below, this equates to an increase of an overall growth of 15,000 jobs within this sector.

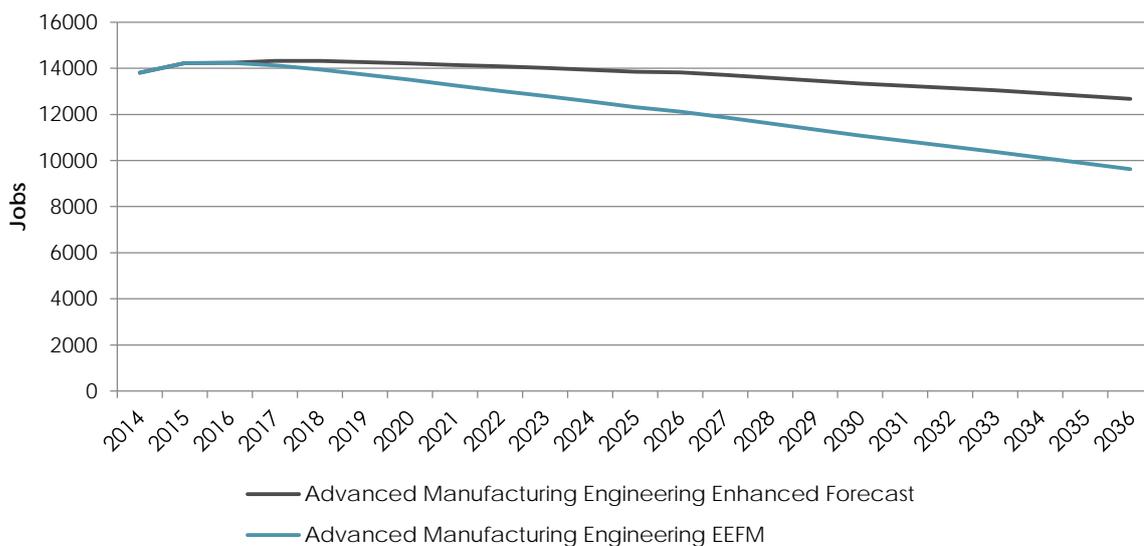
<sup>3</sup> [https://www.gov.uk/government/uploads/system/uploads/attachment\\_data/file/211843/professional-and-business-services-industrial-strategy-infographics.pdf](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/211843/professional-and-business-services-industrial-strategy-infographics.pdf)

Figure 36: Greater Norwich-Forecasts for Professional, Business and Finance Services –Additions Jobs (2014-2036)



- 5.59 **Advanced Manufacturing and Engineering:** As explained in the previous section, the Greater Norwich economy has a particular strength in advanced manufacturing and engineering activities, which is likely to provide a strong economic driver for future growth over and above the baseline trend in the area. To understand the potential scale of the opportunity and its implications on land needs we have looked into the national prospects for sector growth.
- 5.60 Research produced by RBS defines a broad range of activities that are captured within the “Advanced Manufacturing” sector including pharmaceuticals, metal products, rubber and plastics (including composites) and machinery and equipment, alongside automotive and ICT activities.
- 5.61 RBS recognised the strength of the UK sector, being the ninth largest manufacturing nation (by output) in the world, and predicted that the sector will be at the forefront of economic growth over a five year period from 2012. They forecast growth rates of between 1% and 3% per annum, up to double the rate they predicted for general economic growth.
- 5.62 Clearly not all of these sectors are relevant to the Greater Norwich economy, however key components of the RBS definition relate to the existing and future make up of areas manufacturing sector. Within the EEFM forecast these sectors are “Food”, “Electronics” and “Transport Equipment”.
- 5.63 Historic growth within the sector suggests there is considerable potential for future growth and diversification. To test the implications of realising this potential we have applied a growth multiplier towards the upper end of the RBS forecast range to Baseline forecast, creating an additional growth over 2% per annum within the identified sectors for the period up to 2036.

Figure 37: Greater Norwich- Forecasts for Advanced Manufacturing and Engineering Jobs

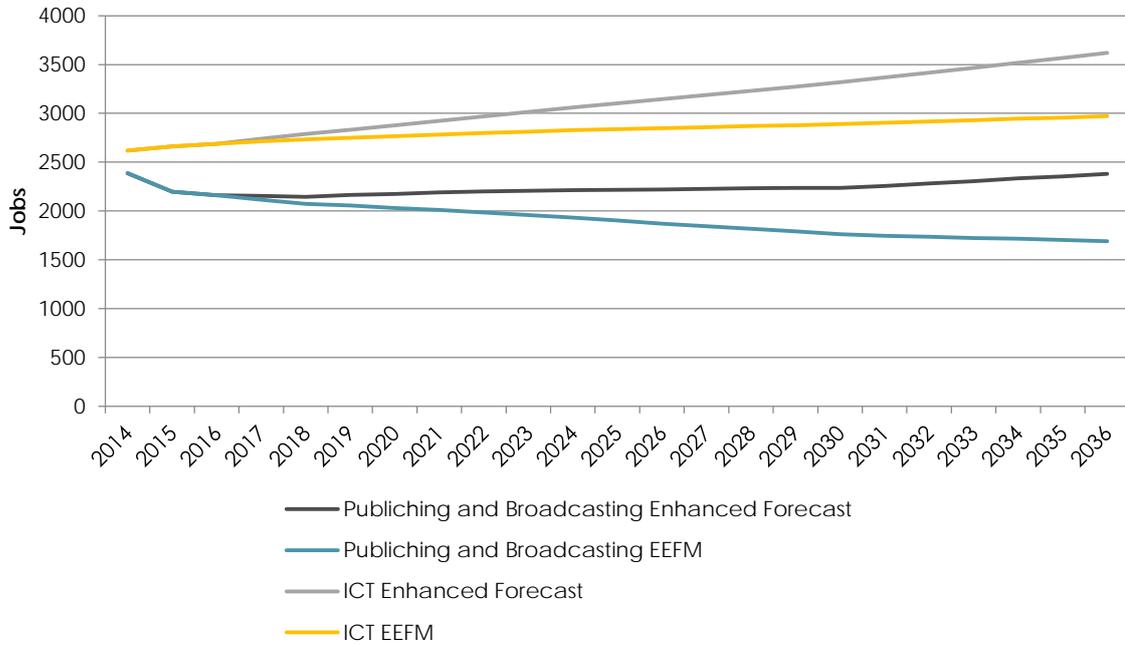


- 5.64 **Creative and Tech:** The global prospects for creative and digital technologies are promising. With fixed, mobile and broadcast networks converging, and devices and objects increasingly connected to form the Internet of Things (IoT) ICT is transforming social interactions and personal relationships.
- 5.65 The developments combined with a large domestic market and a Government strongly supporting digital growth, digital citizenship and procurement, mean Greater Norwich is well positioned to attract high quality technology and digital related inward investment and perhaps research institutes exploiting digital technologies. This would build on (a) its presence of large financial corporates deploying FinTech, (b) manufacturing firms investing in the Fourth Industrial Revolution/IoT, (c) robotics in food and drink and (d) research organisations already utilising Big Data and data analytics.
- 5.66 Both Creative and tech industries have been identified as one of the fastest growing sectors in the UK and a great driver for East Anglia’s economy. As a proxy to this sector we have used publishing sector activities and Computer Related Activities, with arts and tech activities translating into non-B class use in the forecasting model.
- 5.67 Based on the EEFM forecast the sector ICT sector will see a growth of over 350 jobs and a decline of over 650 jobs in publishing sector between 2014 and 2036.
- 5.68 To reflect expected growth in the creative industries we have looked to boost the sector beyond the base forecast level in Greater Norwich. To understand the impact of creative and tech related employment we have looked into research published by PWC providing an

outlook for this sector suggesting media and entertainment to grow by 3 to 3.4% per annum between 2014 and 2019<sup>4</sup>.

5.69 Based on this we expect the publishing & broadcasting to sector to show almost neutral growth and the ICT sector to show an increase by an additional 1,000 jobs.

Figure 38: Greater Norwich- Forecasted Creative and Tech



<sup>4</sup> <http://www.thedrum.com/news/2015/06/03/uk-digital-media-enjoy-four-year-boom>

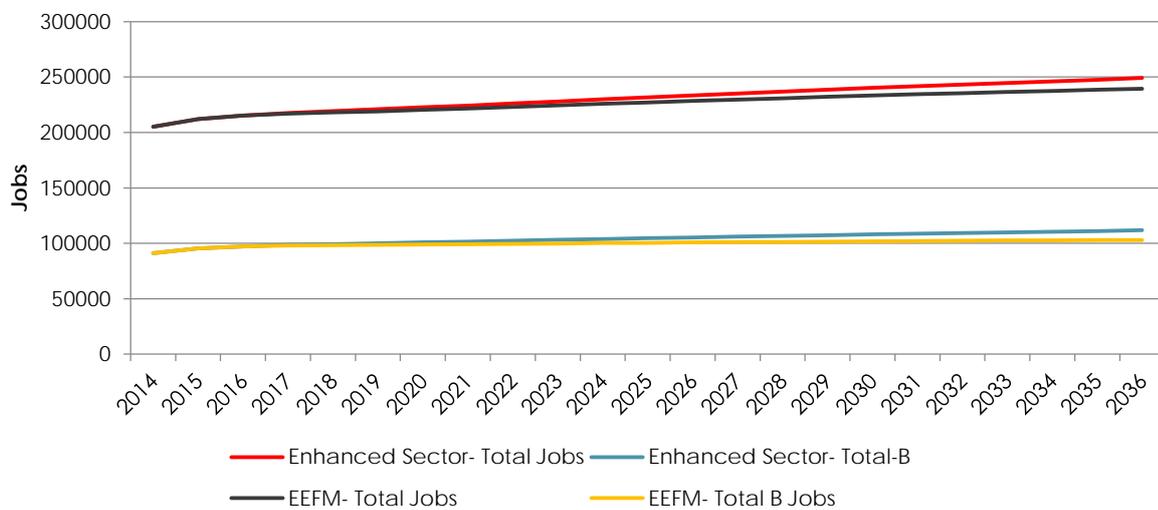
## An Enhanced Forecast for Greater Norwich

5.70 To provide an understanding of the scale of growth achievable within Greater Norwich based on our assessment of economic potential we have brought each of the sector specific adjustments together into a single ‘enhanced’ forecast for the area.

5.71 As shown in the following graph shows the enhanced forecast is likely to add an additional 44,000 jobs in the area, 9500 more jobs than EEFM, between 2014 and 2036. Out of this total jobs increase of 44,000, approximately 47% are within the B-class employment use.

5.72 The graph below sets out the comparison between the two forecasts.

Figure 39: Greater Norwich- Forecasted Total Jobs Growth



## 6. Employment Land Requirements

- 6.1 The above analysis considered two alternative scenarios for employment growth, business as usual and enhanced. To understand the level of development the Greater Norwich local plan should be planning for we have translated the employment growth (as per the forecast above) into employment floorspace/land requirements holding the same assumptions of employment density by particular use class set out in Section 4.
- 6.2 According to the graph, the highest growth in floorspace is forecasted other business space (B1c, and B2), approximately 39% of the total B-class growth, mostly attributed to increase in advanced manufacturing related jobs. These jobs are expected to replace more traditional forms of manufacturing jobs, on a decline. Given most of these jobs are likely to happen within industrial typologies, a significant impact is also expected on increased land needs, approximately 30 ha more than the baseline EEFM.
- 6.3 Similarly, office based sectors are also likely to experience a significant increase in the jobs, highest among the three use classes. The floorspace needs for this sector is similar to industrial (c. 37% of the total floorspace needs). However, when translating into the land needs, the sector is significantly less land-hungry and is likely to have relatively smaller additional need of 7 ha compared with the EEFM base forecast.

Figure 40: Greater Norwich Forecasted Floorspace Needs (sqm)

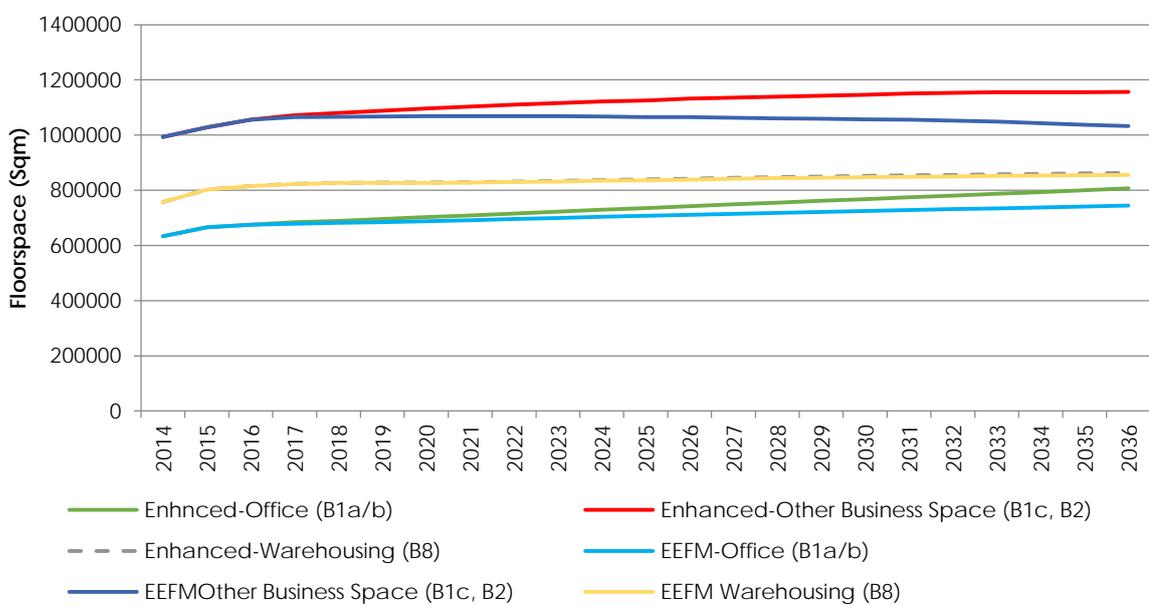


Table 41: Greater Norwich- Employment Land Requirement from Economic Growth

Greater Norwich-Baseline Scenario Land Needs EEFM			
	Employment (Nos.), 2014-2036	Floorspace Demand, 2014-2036 (Sqm)	Land Demand 2014- 2036 (Ha)
Office (B1a/b)	9,250	110,998	11
Other Business Space (B1c, B2)	1,118	40,264	10
Warehousing (B8)	1,394	97,614	24
<b>Total</b>	<b>11,762</b>	<b>248,876</b>	<b>46</b>
Greater Norwich- Enhanced Sector Growth Scenario Land Needs			
	Employment (Nos.), 2014-2036	Floorspace Demand, 2014-2036 (Sqm)	Land Demand 2014- 2036 (Ha)
Office (B1a/b)	14,455	173,459	17
Other Business Space (B1c, B2)	4,529	163,047	41
Warehousing (B8)	1,503	105,200	26
<b>Total</b>	<b>20,487</b>	<b>441,706</b>	<b>84</b>

6.4 As recognised within section 4 'economic growth' accounts for only one element of the total land requirement within Greater Norwich, with allowances also required for Windfall Losses and Churn.

6.5 As shown below, under the base scenario inclusion of Winfall and Churn increase the land requirement significantly, totalling 75ha, the largest uplift coming from increased need for office floorspace to replace that lost as 'windfall' to other uses.

Table 42: Greater Norwich- Total Land Requirement – Base Scenario

	Floorspace Demand 2014- 2036	Allowance for windfall losses	Allowance for Churn	Change in floorspace	Change in Land
	m <sup>2</sup>	m <sup>2</sup>	m <sup>2</sup>	m <sup>2</sup>	Ha
Office	110,998	112,545	54,527	278,070	28
Other Business Space	40,264	0	23,455	63,718	16
Warehouse	97,614	0	28,866	126,480	32
<b>Total</b>	<b>248,876</b>	<b>112,545</b>	<b>106,848</b>	<b>468,268</b>	<b>75</b>

6.6 Similarly, under the enhanced scenario there would also be a significant increase in floorspace required, totalling 114ha.

Table 43: Greater Norwich- Total Land Requirement – Enhanced Scenario

	Floorspace Demand 2014- 2036	Allowance for windfall losses	Allowance for Churn	Change in floorspace	Change in Land
	m <sup>2</sup>	m <sup>2</sup>	m <sup>2</sup>	m <sup>2</sup>	Ha
Office	173,459	112,545	54,527	340,531	34
Other Business Space	163,047	0	23,455	186,501	47
Warehouse	105,200	0	28,866	134,066	34
<b>Total</b>	<b>441,706</b>	<b>112,545</b>	<b>106,848</b>	<b>661,098</b>	<b>114</b>

## 7. Conclusions and Recommendations

- 7.1 Under this section, we draw together quantitative and qualitative assessment of employment land supply and forecast employment demand to (2036) to establish the balance between these two factors, and the ability for the existing employment land supply to meet demand in terms of the quantum of land available. This is considered in relation to the total land supply in the three local authorities combined.
- 7.2 Having drawn conclusions about the suitability of employment land provision across Greater Norwich in quantitative terms, the qualitative elements of balancing employment land demand and supply are explored. This goes beyond the quantum to understand whether the right type of employment land is being provided in the right locations, to meet the land requirements of different types of sector specific employment activity.
- 7.3 For all the key strategic knowledge economy sectors identified for Greater Norwich, the requirement for its locations are detailed, which supports the identification of the site clusters which supports the growth of this sector in Greater Norwich economy. Further requirements which provide secondary support for the growth of sector specific activity area is also identified.

### Available Floorspace and Land

- 7.4 Firstly, drawing on our analysis of land supply across the Greater Norwich area we provide a recap of the identified capacity to accommodate growth. This draws on both the supply of vacant land within the existing employment sites and the land allocations identified within the study, it is these sites that are most likely to provide the truly additional capacity given most sites within Greater Norwich are well developed and offer few intensification opportunities.
- 7.5 As set out in the previous sections there are, in total, 42 sites that have future employment potential, either linked to existing active sites or as new standalone economic locations, these are drawn from both;
- **Allocated employment sites** which are vacant / have no active employment use / are undeveloped
  - **Call For Sites employment sites** which have been put forward for potential future employment use as part of the Council's ongoing Call For Sites process
- 7.6 As shown below these provide a total of 342ha of employment land.

Table 44: Greater Norwich Potential Employment Sites

Local Authority	Allocated sites (number)	Vacancy on allocated sites(ha)
Broadland	13	151
Norwich	12	6
South Norfolk	17	185
<b>Greater Norwich Total</b>	<b>42</b>	<b>342</b>

## Balancing Demand and Supply

7.7 Bringing both the requirement and supply figures together it is clear that there is significant capacity within Greater Norwich to accommodate future growth.

Table 45: Balance between Employment Land Supply and Demand in Greater Norwich

		Vacancy on Existing Sites (Ha)	Vacancy on Allocated Sites (Ha)	Total Available (Ha)
Supply	Broadland	14	149	163
	Norwich	20	6	26
	South Norfolk	56	119	175
	<b>Total Supply</b>			<b>363</b>
Need	<b>Call for Sites</b>			<b>67</b>
	<b>Additional Need (Baseline)</b>			<b>75</b>
	<b>Additional Need (Enhanced Sector Growth)</b>			<b>114</b>

7.8 The figures set out above suggest that even under the enhanced scenario the 42 'allocated' sites would provide almost 3 times the level of capacity than is required. However, considering the description of sites, it is evident that some are likely to be more suitable for specific types of future employment activity than others. For example;

- Certain potential sites are large scale brownfield sites which would require significant site clearance and remediation in order to prepare the site for new employment development, which could affect the viability of delivering any form of employment activity on site.
- Some brownfield sites accommodate existing power and utilities infrastructure, or infrastructure and built development supporting the functionality of neighbouring sites, or may be required to accommodate these types of provision in the future, which could constrain the employment development potential on these sites.
- A number of potential sites provide large scale opportunities or fall within rural locations which, given the lack of a local concentration of industries that require large floorplates such as storage and distribution (B8) activities, will require an element of strategic direction rather than dependence on market-led development. Development plans such as the

North Rackheath masterplan and the Long Stratton Area Action Plan provide good examples in Greater Norwich of how this is being achieved and will prove useful when considering the approach for other allocated sites.

- 7.9 This emphasises the importance of understanding the balance of land required to accommodate future employment growth on both a quantitative and qualitative basis, in order to ensure the right type of employment location can be provided for the range of potential employment activity in Greater Norwich over a medium and longer term outlook.

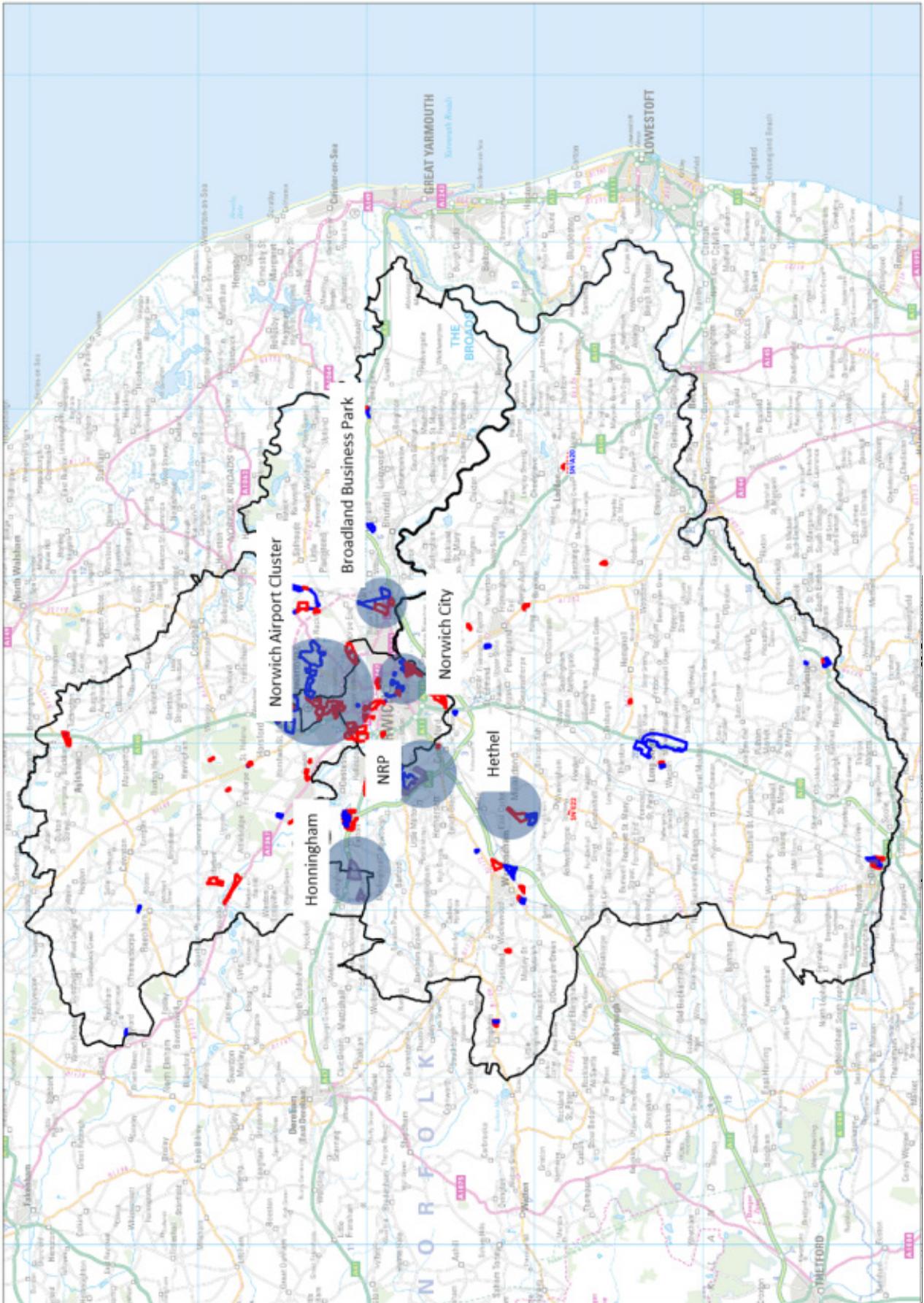
## **Qualitative Considerations**

- 7.10 The challenge for supporting the economic growth of Greater Norwich is clearly not related to the quantum of employment land available across the sub-region, but rather reflects the suitability of this land in meeting the demand from the different growth sectors and employment activities. This suitability is dependent on a set of key characteristics relating to identified employment activity clusters (existing and potential employment sites) and how this meets the requirements for Greater Norwich's key sector specific growth requirements.

## **Alignment of Site Characteristics with Sector Requirements**

- 7.11 Using a qualitative understanding of the balance between employment land demand and supply, a portfolio of sites / site clusters is identified which maximise land use assets and infrastructure connectivity, and meet with the occupier demands and requirements to support growth in the key growth sectors identified for the Greater Norwich sub-region. This draws on the conclusions made about the sites in each Greater Norwich authority in the Supply Assessment.

Figure 41: Key High Value Knowledge Economy Employment Growth Clusters in Norwich



Map reproduced from Ordnance Survey material supplied by Norfolk County Council © Crown copyright and database rights 2017 Ordnance Survey 100019340. Use of this data is subject to terms and conditions.

7.12 Blue shading indicates the strategic site clusters in Greater Norwich, which can also contribute to sector specific economic growth opportunities. The following clusters are identified, and labelled in the figure:

- Norwich Airport Cluster
- Broadland Business Park
- Norwich City
- Hethel Engineering
- Norwich Research Park
- Honingham/Easton (Food Enterprise Zone)

7.13 This strategic portfolio of site clusters underpins a strategy to co-ordinate and focus future site delivery and investment to ensure the area acts like a functional economic hub, rather than a group of local authority areas with competing or conflicting propositions.

7.14 The economic sector analysis informing the initial phases of this Study, and further consideration of sector performance and how this can be translated into future economic growth projections, informs the identification of a set of key location requirements for each type of sector specific activity relevant to the Greater Norwich area.

7.15 Table 45 combines these location requirements with the strategic employment clusters identified in Greater Norwich to identify the clusters that can meet these requirements. This is not an exhaustive list, but identifies the key locations where activity already exists and can be supported and increased, or where there is a good opportunity to support new activity. This takes into consideration market presence, the capacity to accommodate a significant scale of activity, the presence of key occupiers related to the identified economic growth sectors, and links with supply chains and the ability to draw skills to the area.

Table 46: Alignment of Site Clusters with Sector Specific Activity and its Location Requirements

Sectors	Requirements	Locational Characteristics	Typologies	Site Clusters
<b>Life Sciences, Health and Food tech R&amp;D</b>	<ul style="list-style-type: none"> <li>Existence in a cluster underpinned by anchor tenants and institutions-ecosystem of education, large corporate and SME occupiers</li> <li>Access to local skilled workforce</li> <li>Proximity to Advanced Manufacturing activity clusters</li> <li>Accessibility and connectivity- local, regional and international</li> </ul> <p>Good Broadband and Digital Infrastructure</p>	<ul style="list-style-type: none"> <li>Urban-clustering with education and large corporate occupiers institutions</li> <li>Urban edges and peripheral locations - Research Park</li> </ul>	<ul style="list-style-type: none"> <li>Out of science/business park;</li> <li>Small to medium floorplate</li> <li>Single to mixed occupiers;</li> <li>Flexible co-working office spaces;</li> <li>Co-working lab spaces</li> </ul>	<ul style="list-style-type: none"> <li>Norwich Research Park</li> <li>Honningham</li> </ul>
<b>Professional, Business and Finance Services</b>	<ul style="list-style-type: none"> <li>Existence in a cluster through anchor tenants and institutions</li> <li>Good public transport connectivity for employees</li> <li>Integration with complementary retail and leisure</li> <li>Good Broadband and Digital Infrastructure</li> <li>Interface between large and SME businesses</li> </ul>	<ul style="list-style-type: none"> <li>Existing urban centres</li> <li>Urban edges and peripheral locations – Business Park</li> </ul>	<ul style="list-style-type: none"> <li>Small to medium sized floorplates; flexible-</li> <li>Co-working and small office footprint;</li> <li>business parks with small to medium size floorplates.</li> <li>Home working</li> </ul>	<ul style="list-style-type: none"> <li>City Centre</li> <li>Broadland Business Park</li> <li>Town Centres</li> </ul>
<b>Advanced Manufacturing &amp; Engineering</b>	<ul style="list-style-type: none"> <li>Good connectivity to the strategic road network</li> <li>Availability of large scale sites in non-residential areas</li> <li>Access to local skilled workforce</li> <li>Proximity and accessibility to London and South East markets and supply chains</li> <li>Link with supply chains such as ports and airports</li> <li>Clustering with existing manufacturing activity and similar types of business activity</li> </ul>	<ul style="list-style-type: none"> <li>Urban peripheral and edges;</li> <li>Out of town</li> <li>Suburban</li> <li>Rural</li> </ul>	<ul style="list-style-type: none"> <li>Small, medium and large floorplate;</li> <li>tech and industrial parks</li> </ul>	<ul style="list-style-type: none"> <li>Norwich Airport Cluster</li> <li>Hethel Engineering</li> <li>Diss</li> </ul>

<p><b>Digital / Tech Industries</b></p>	<ul style="list-style-type: none"> <li>• Mixed use environments</li> <li>• Proximity to anchor tenants and institutions (supporting clustering of activity)</li> <li>• Access to local skilled workforce</li> <li>• Integration with the existing urban fabric</li> <li>• Proximity to local services and amenities (i.e. high streets and town centres)</li> <li>• Good public transport connectivity for employees</li> <li>• Good broadband and digital infrastructure</li> <li>• Ecosystem of both large/ institutional and SME spaces.</li> </ul>	<ul style="list-style-type: none"> <li>• Urban mixed-use environment s- city and town centres</li> <li>• Integration with education institutions</li> </ul>	<ul style="list-style-type: none"> <li>• Office / bench spaces;</li> <li>• Small to medium floorplate;</li> <li>• Co-working;</li> <li>• Potential for larger floorspaces out of town linked to other industries (Fintech for example)</li> </ul>	<ul style="list-style-type: none"> <li>• Norwich City Centre</li> <li>• Broadland Business Park</li> <li>• Town Centres</li> </ul>
<p><b>Cultural / Creative Industries</b></p>	<ul style="list-style-type: none"> <li>• Good connectivity to the strategic road network and public transport</li> <li>• Integration with complementary retail and leisure for wider offer</li> <li>• Good broadband and digital infrastructure</li> <li>• An active creative class supported by cultural and education institutions</li> </ul>	<ul style="list-style-type: none"> <li>• Existing urban centres;</li> <li>• Urban edges and peripheral locations</li> </ul>	<ul style="list-style-type: none"> <li>• Mix office, studio and light industrial</li> <li>• Small, medium and large floorplates;</li> </ul>	<ul style="list-style-type: none"> <li>• Norwich City Centre</li> <li>• Town centres</li> <li>• Urban fringes</li> </ul>



# GVA

An **APLEONA** company

Appendix I  
Assessment  
Matrix

# GVA

An **APLEONA** company

Appendix II  
Site  
Assessment  
Forms

# GVA

An **APLEONA** company

Appendix III  
Site Maps