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**EMPLOYMENT LAND: SITE
ASSESSMENTS**

APRIL 2016





GL Hearn

Employment Land: Site Assessments

Ashford Borough Council

Final Report

April 2016

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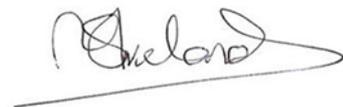
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1 INTRODUCTION

- 1.1 Ashford Borough Council is in the process of developing a new Local Plan to 2030. This will set out planning policies to guide future development over the period to 2030. This Study assesses the Borough's employment sites with regard to: first, their suitability and market attractiveness and second their development potential and capacity.
- 1.2 The Study has been prepared in the context of National Planning Policy Framework (NPPF), which sets out Government policies for planning; and Planning Practice Guidance on *Housing and Economic Development Needs Assessments* and *Housing and Economic Land Availability Assessments*. The Planning Practice Guidance (PPG) sets out how studies such as this should be undertaken.
- 1.3 The purposes of this study are to undertake an appraisal of the employment sites in Ashford Borough with regard to:
- Suitability and market attractiveness
 - Development potential and capacity
- 1.4 This report represents Stage 4 of the Strategic Employment Options Report (SEOR) which GL Hearn produced for Ashford Borough Council in March 2012.

The Strategic Employment Options Report

- 1.5 The Strategic Employment Options Report set out a number of scenarios for economic growth in the Borough and considered future demand for employment land to 2030. It was prepared by GL Hearn supported by Cambridge Econometrics and SQW.
- 1.6 There were a range of factors which were considered in order to develop economic scenarios for the Borough. These are summarised in the figure below:

Figure 1: Factors Influencing Development of Economic Scenarios



- 1.7 The SEOR interrogated a baseline projection for economic growth in the Borough; and developed further three economic scenarios. A downside risks scenario was developed taking account of risks to economic performance associated with weaker global growth, availability of credit, public sector spending restraints, and cessation of international rail services. This effectively provided a revised baseline scenario. Two scenarios for stronger economic performance were then set out. An Enhanced Performance Scenario was developed based on maximising the Borough's economic growth potential. This took account of its first rate transport infrastructure, assumed enhanced performance of the office market, continued growth in warehouse/ distribution activities, and enhanced growth in retail and leisure, in sectors such as IT/computing and new media, as well as in rural areas. The final scenario, the Enhanced Productivity Scenario, was developed through moderating the Enhanced Performance Scenario by focusing more specifically on higher value-added activities. This saw enhanced performance in the IT, digital/ media, pharma/ medical and office-based activities.
- 1.8 The SEOR Report sets out the scale of employment growth envisaged in each of these scenarios to 2030; and outlines sectoral performance in each. This was then developed to provide a range of future demand scenarios for employment land and floorspace in the Borough. The forecasts contained therein calculated a requirement for between 12 – 27 hectares of land for office and R&D uses, a gross requirement for between 12 – 21 hectares of industrial land, and a need for 25-28 hectares of land for warehouse/distribution activities (as set out in Figures 9.10 – 9.12 in the SEOR Report).
- 1.9 These figures were based on the expected net employment growth in the various scenarios and the distribution of this between different sectors. The report however identified that an element of demand could arise from churn within the local market as existing companies seek new premises. It

also recommended that a 'margin' was incorporated to provide for a choice of sites to take account of the qualitative requirements of different occupiers, support competition within the commercial development sector, and to reflect the inexact nature of any long-term forecasting exercise. It recommended that a margin of 25% over and above the gross forecasts was provided – which was effectively equivalent to providing for an additional 5 years' land supply in each scenario over the period to 2030.

- 1.10 On this basis the report identified the following levels of 'need' for employment land over the 2010-30 period:

Table 1: Forecast Land Requirements

Forecast Land Requirements 2010-2030 (Hectares)	Baseline	Downside Risks	Enhanced Performance	Enhanced Productivity
Office and R&D Uses (B1a/b)	14.2	11.9	26.6	26.3
Industrial Uses (B1c/B2)	14.1	12.5	12.2	20.9
Warehouse/Distribution Uses (B8)	28.3	25.3	28.7	26.0
All B-Class Uses	56.7	49.6	67.5	73.2
All B-Class Uses with 25% Margin	70.9	62.0	84.4	91.5

Source: Ashford Borough Council, Strategic Employment Options Report, March 2012 (GL Hearn)

- 1.11 These scenarios based on scenarios for 'labour demand' where compared within the SEOR Report with past development trends. The analysis indicated if past completions trends over the 2000-10 period were projected forwards this would require provision of 96 hectares of land over the plan period.

Purpose of this Report

- 1.12 This previous report did not assess the existing supply position of employment land in Ashford Borough i.e. it did not analyse the quantity or quality of employment land and sites.
- 1.13 The purpose of this report is to assess the current provision of employment land in the Borough and consider the supply of employment land which may be necessary in order to deliver future growth. It analyses the current provision of employment land and sites in the Borough and potential sites which could be allocated in the New Local Plan to 2030. This will enable the council to decide on a policy basis what sites to allocate in the Local Plan.
- 1.14 The Ashford Rural Economic Assessment conducted by Nathaniel Lichfield & Partners (NLP) assessed the likely growth of the rural economy to 2030 and identified locations within the rural area of Ashford Borough that are capable and suitable for accommodating jobs and industry to

support the growth of the local economy. This explained that “Rural Ashford has insufficient employment floorspace in quantitative terms to meet future needs up to 2030 under all scenarios of future growth [according to the Strategic Employment Options Report], with a relatively significant shortfall of both industrial and office space arising under all four approaches” (Ashford Rural Economic Assessment, 2014: para. 7.13-72). It advised that the Council adopt a combined policy approach to accommodate rural growth using site allocations and market-led development control.

- 1.15 The principal development constraint in the south of Ashford Town is considered to be the lack of capacity on the road network specifically around Junction 10 of the M20. ‘Providing for the transport needs arising from the *South of Ashford Transport Study: Supplementary Planning Guidance 6 to the Ashford Borough Local Plan* (June 2004) [SPG6]’; identified that the primary constraint for development in the south of Ashford is the capacity of the transport network especially at junction 10 of the M20. In 2004, it was considered that the junction was nearing capacity at peak times and would be unable to accommodate the traffic generated by new development (para. 2.3: 1). In 2007, £7 million of interim improvements were implemented to signalise the junction and improve its capacity. These improvements were forward funded and are being repaid through payments through the SPG6. The SPG applies to development proposals at Cheeseman’s Green (now known as Finberry) and Waterbrook. Furthermore, it also applies to “any development within a 5 minute (off peak) isochrone centred on M20 junction 10 that would, in the opinion of the Highway Authority, either individually or cumulatively as part of a larger development on the same site, generate at least 100 two-way vehicle trips between 7a.m. and 7p.m” (para. 4.2: 4). Section 5 of the SPG outlines the individual elements of the Transport Plan to which developers will and have contributed and Section 6 sets out the cost apportionment of contribution per development unit (Ashford Borough Council, SPG 6, 2004).
- 1.16 The 2007 interim improvements supported delivery of employment floorspace on nearby sites. Moving forwards, a new junction (10A) on the M20 is proposed, to be situated approximately 700 metres east of the existing junction 10 near Ashford in Kent. The new junction will use two bridges and connect to the existing A20 and a new dual carriageway link road built to the A2070 near Sevington. A nine week public consultation on the proposals is on-going at the time of writing, running from 14th January to 17th March 2016.
- 1.17 The new M20 junction (10A) will provide additional capacity for the Ashford area and reduce the congestion at the existing Junction 10. It will unlock the potential for future growth in the Ashford area and support delivery of employment sites to the south of the Town. Delivery of the new junction is expected in 2019.

Report Status and Structure

- 1.18 This report should be read alongside the Strategic Employment Options Report (SEOR), prepared by GL Hearn, which provides forecasts for overall demand for B-class employment land in Ashford Borough.
- 1.19 This report assesses the supply of current employment sites, and potential land which could be allocated for employment development. The remainder of the report is structured as follows:
- Section 2: Commercial Property Market
 - Section 3: Assessment of Selected Employment Sites
 - Section 4: Supply/Demand Balance and Conclusions.

2 COMMERCIAL PROPERTY MARKET

2.1 In this section we have reviewed commercial property market dynamics, considering macro-economic dynamics and then the industrial and office markets.

National Economic Conditions

2.2 Nationally, economic growth has been above trend over the last year and a half supported by growth across a range of different parts of the economy. The Office for Budget Responsibility (OBR) published its Economic and Fiscal Outlook in July 2015. GDP growth was revised downwards to 2.4% for 2015, having been previously forecast at 2.5%. This was due to a weaker than expected start to the year – ONS has also estimated that GDP growth in the first quarter of 2015 was 0.4%, 0.3% below forecast.

2.3 While the economic growth in 2015 has continued in line with the OBR's projected growth rate, the OBR recognises significant uncertainty in its economic forecast due to the recent Greek debt crisis and a number of policy measures. During the course of 2015, the slowdown in China's economy and drop in the oil price have influenced the wider economic outlook.

2.4 The OBR reports that employment growth has remained relatively strong in early 2015, while productivity has continued to disappoint. Its forecasts that employment will increase by 1.1 million over the next six years. Such an increase is more than explained by population growth.

2.5 OBR have made small upward revisions to unemployment and downward revisions to hours worked in the final years of the forecast. That reflects higher labour costs from the introduction of the National Living Wage.

2.6 The introduction of the National Living Wage on top of the National Minimum Wage for over 25s is expected to impact on the labour market. However at present the likely response of firms is unknown creating significant uncertainty. The OBR assumes that increased labour costs will lead to a reduction in total hours worked of around 0.4%. This impacts equally on average amount of hours worked and employment levels – the OBR estimates it leading to around 60,000 fewer people in employment. However, since the reduction in hours worked will be concentrated among people earning lower wages the OBR assumes a smaller reduction in total economic output of around 0.1 per cent.

2.7 In August 2015 the Bank of England voted to maintain the base rate at its historic low of 0.5%. This is well below the Monetary Policy Committee's 2% inflation target and largely reflects unusually low contributions from energy, food, and other imported goods prices. It remains unlikely that the bank rate will rise in the short-term.

- 2.8 CPI inflation returned to zero in June. In August 2015 the Bank of England's stated approach was that, with some underutilised resources remaining in the economy and with inflation below the target, the Committee intends to set monetary policy in order to ensure that growth is sufficient to absorb the remaining economic slack so as to return inflation to the target within two years.
- 2.9 The Committee projects UK-weighted world demand to expand at a moderate pace. Private domestic demand growth in the United Kingdom is expected to remain robust. Household spending has been supported by the boost to real incomes from lower food and energy prices. Wage growth has picked up as the labour market has tightened and productivity has strengthened. As a result business and consumer spending has increased, helped by improving credit conditions. Robust private domestic demand is expected to produce sufficient momentum to eliminate the margin of spare capacity over the next year or so.

Office Market Review

National Market Dynamics

- 2.10 At a national level the office market performed strongly in 2014, reflecting increased confidence and economic growth spreading beyond the top performing centres to all UK regional markets. As business sentiment has improved, occupiers have expanded headcount and upgraded their accommodation. The total size of the UK workforce increased by 2% during 2014, while business investment hit a record £175.5bn – a 7% increase since the previous year.
- 2.11 This has driven an increase in office take-up nationally. Across the UK, 2014 saw the highest level of office take-up since 2001 with deals for 27.5 million sq ft. of office floorspace – an increase of 8% on 2013 figures. This was driven by increased activity not only in London but also in the regional markets – trends in office take-up in the regional markets increased by 22% in the last year.
- 2.12 Renewed economic optimism has fuelled the meaningful return of speculative development outside of London, which had been limited since the economic downturn in 2008. Lambert Smith Hampton report that the amount of space under construction in the regional centres has doubled since the end of 2013.
- 2.13 The Building Owners and Managers Association (BOMA) International, of whom the British Council for Offices is an international member, explain that office space can be classified into three categories: Grade A, Grade B, and Grade C:

- 2.14 Grade A represents prestigious office buildings competing for premier office users with rents above average for the area. These buildings have a high quality of finish, and up-to-date technological and communications infrastructure, exceptional accessibility and a clear market presence.
- 2.15 Grade B office buildings compete for a broad range of occupiers with rents in the average range for the area. The quality of these buildings ranges from fair to good for the area. The technology and communications systems are adequate; however the building does not compete with Class A at the same price.
- 2.16 Grade C office buildings provide functional office space at rents below the average for the area. The quality of the building will be markedly lower than Grade A or B properties. It may have a secondary profile and may be situated in a non-office business location (BOMA, 2016).
- 2.17 Across the UK, take-up of Grade A office buildings/space has increased by 5% year-on-year, resulting in an ever diminishing supply of existing grade A space. Lambert Smith Hamptons report that UK-wide availability fell by a further 4% during 2014 to stand at 51.1m square feet. This is despite a 19% rise in speculative development. This has also impacted on the take-up of Grade B/C office space which has seen a 9% increase nationally since the previous year.
- 2.18 The diminishing supply of office space is not only driven by increasing take-up rates but also from change of use to alternative uses – particularly residential. In 2013 the Government announced a change in permitted development rights to allow the change of use of office floorspace to residential uses without the need for planning permission. This has resulted in considerable losses of office floorspace nationwide, adding to the pressures of an increasing absorption rate. In 2014 Lambert Smith Hampton estimate a loss of 6.8 million square feet of office space nationally.

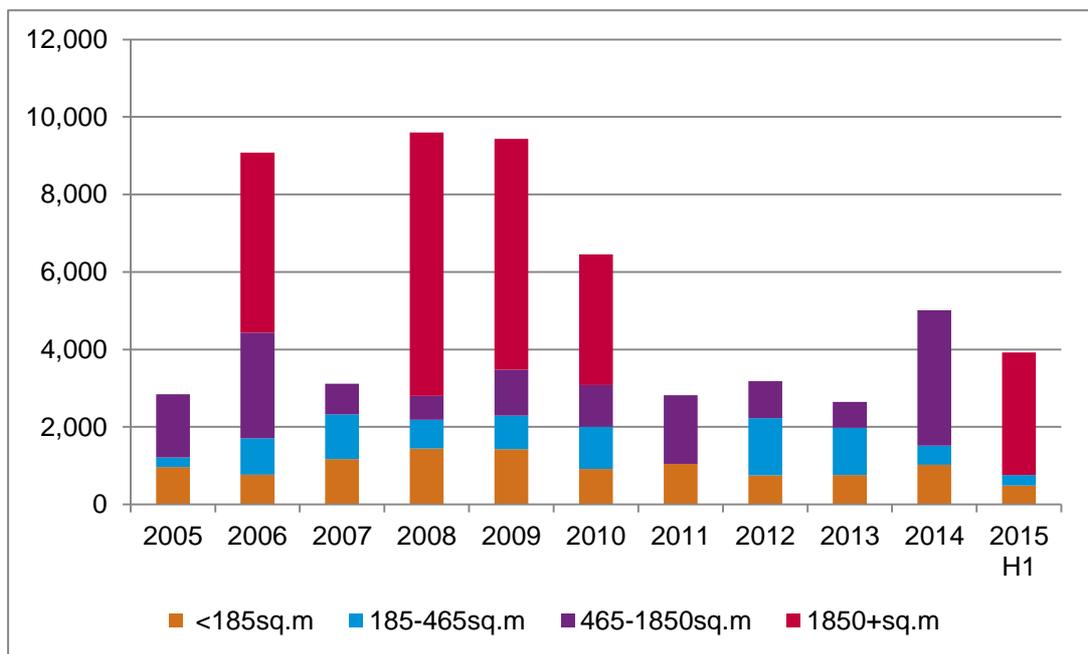
Local Market Dynamics

- 2.19 The office market in Ashford has performed somewhat differently to national market trends. In 2008 and 2009, office space take-up was greater than all years in the period 2005-2014. However, this was due to large office space take-up deals at Eureka Park in 2008 and 2009. For example, in 2009 Smiths Medical International took a 15 year lease on 2,246 square metres of office space at a passing rent of £19.50 per square feet (£209.90 per square metre).
- 2.20 According to Caxtons, the average office rent has remained relatively constant at £15.00 per sq ft. (£160.00 per square metre) during the period 2010-2014 in Ashford. Colliers International explain that Grade A office rents are currently £19 per sq. ft. (increasing from £18 per sq.ft. in 2014) and £13.50 for Grade B space in Maidstone. It is suggested that these levels of rent are also being achieved in Ashford. Data derived from EGi showed that a recent a lease for office space at Eureka Park in August 2014 achieved a passing rent of 19.50 per sq.ft. (£209.90 per sq.m). This suggests

the rental levels for Grade A office space in Ashford have generally not increased since substantially the recession. At this level, the viability of new-build office development will be marginal.

2.21 Figure 2 below profiles office take-up. Recent deals for office space in Ashford include: Entire Building, Eureka Park - Herald, Trinity Road, Ashford (3,168 sq.m.); Suite A & B Pluto House, Ashford Station (1,845 and 2,245 sq.ft.) to Stena Line Ltd (Kent Property Market).

Figure 2: Office Take-up in Ashford 2005-2015

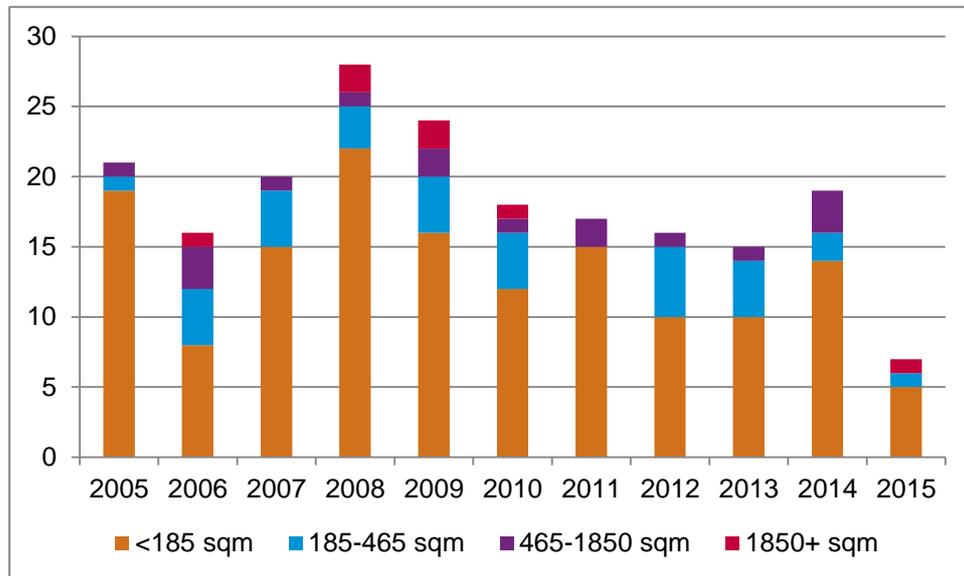


Source: EGi and GL Hearn

2.22 Figure 2 demonstrates that office take-up declined significantly during 2011-2013 having peaked during 2008-2009. There has been a steady recovery in office-take up during 2014 and 2015, although the total take-up in the first half of 2015 was again dominated by another large letting at Eureka Park. The total average take-up of office space during the last decade was 5,527 sqm per annum – pointing to a modest scale current office market. It will be necessary to attract inward investment to the town to support substantial new-build office development.

2.23 It is apparent that the total take-up of office space below 185 sqm has remained relatively constant throughout the period, averaging at 979 sqm.

Figure 3: Number of Office Space take-up deals



Source: EGi and GL Hearn

2.24 Figure 3 shows the number of office take-up deals divided by size band. This conveys that generally most office take-up deals involve smaller premises of less than 185 sq.m. This implies a greater churn in smaller office premises, which would be expected for small-medium sized businesses. The figure also portrays that few office take-up transactions occur for office premises sized greater than 465 sqm. Indeed, during the period 2005-2015 quarter 2, there were just seven take-ups of office space sized greater than 1,850 sq.m.

2.25 Table 1 below demonstrates the availability of office space in Ashford. It shows that there is a total of 21,622 sq.m. of office space currently available on the market. This represents 3.9 years of supply of built office space assuming the average take-up of space over the last decade. Importantly, it reveals that supply is most limited for larger office units of 1,850+ sq.m., as there is currently 2.3 years supply available for office spaces of this size. This reflects the current hiatus in the construction of large size office premises in Ashford i.e. a lull in construction of large scale office premises.

Table 2: Availability of Office Space

Availability of Office Space	<185 sqm	185-465 sqm	465-1850 sqm	1850+ sqm	Total Availability
Total (sqm)	5,315	4,363	6,476	5,468	21,622
10 Year Average Take-up	979	825	1,329	2,395	5,527
Notional Years' Supply	5.4	5.3	4.9	2.3	3.9

Source: EGi and GL Hearn

- 2.26 The above assessment is partially supported by analysis of Ashford's commercial property market produced by 'Locate in Kent' in October 2015. This reported that the average size of office properties available has declined. Their analysis indicates that over the year from August 2014 to July 2015, the supply of office space has declined by 28% (42% for office space <185 sqm.) and demand has increased by 69% (especially for smaller premises) relative to the previous year.
- 2.27 The supply of office space will continue to be impacted by enhanced permitted development rights enabling conversion from office use to residential dwellings. During the period from January 2013 to November 2015, the council received prior approval applications for approximately 2,221 square metres of office space to be converted to residential units. The largest office to residential conversion is being implemented via a planning permission at Charter House, which will reduce the original office space of approximately 13,935 square metres to 1,394 square metres, representing a loss of 12,542 square metres of office space.
- 2.28 It should be noted that the available supply refers to existing built office space. It does not include land with potential for development of new office floorspace.

Industrial Market

National Market Dynamics

- 2.29 Nationally, the industrial market continues to perform well with year on year increases in industrial land take-up. The latest full year figures for the UK show that total take-up in 2014 was up 5% on 2013 figures.
- 2.30 The industrial sector continues to be dominated by warehouse and distribution uses. There is a growing demand for large scale logistics / distribution warehouses. This is, in part, driven by the continuing growth of the on-line retail sector and increasing customer expectations for same- or next-day delivery.
- 2.31 At a national level, JLL's research points to a current supply of larger warehousing units (9,290 sqm+) of 12 million sq.ft. at the end of 2014 – a low level equivalent to just under a years' worth of stock. This represented a vacancy rate of 5%. This is partly a reflection of a lack of development over recent years, related to wider economic conditions. It in effect relates to the current position within the 'market cycle.'
- 2.32 The supply of available space, particularly Grade A / good quality space in prime distribution locations, has gradually eroded. The latest full year figures for 2014 shows that supply of industrial

space is 15% down on 2013 figures. Whilst 'design and build' represents the predominant form of new supply (accounting for 50% of take-up during the 1st half of 2014 based on GVA's statistics), the lack of available space together with growing market confidence, has driven a return to speculative development in prime locations within the Midlands and South East England.

2.33 The return to speculative development is resulting in a growing level of space coming forward. JLL's UK Logistics Big Box Key Indicators data indicates a total of 1.6 million sq.ft. of speculative space under construction across the UK.

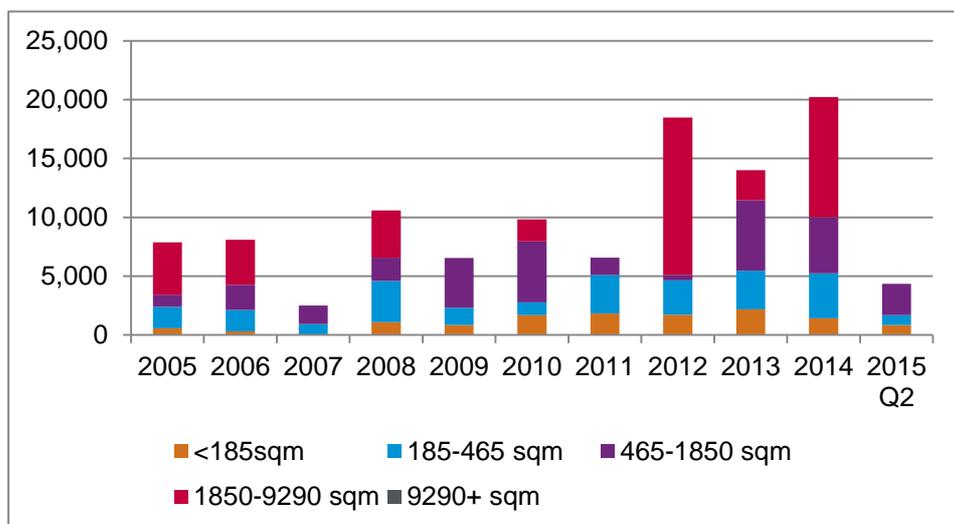
Local Industrial Market

2.34 Industrial floorspace take-up in Ashford declined during the recession and continued to stagnate until recovering strongly during 2012; it has performed reasonably well since then despite a slight weakening in 2013.

2.35 The current typical industrial rent is £6.50 per sq.ft. [psf] (£70 per square metre) in Ashford as evidenced by transaction data from EGi. According to Colliers International, the current Grade A industrial rent in Maidstone is £6.75 psf and £5.50 psf for Grade B. Meanwhile, in Dartford the current Grade A industrial rent is £8.25, reflecting its closer proximity to London.

2.36 Recent deals include: Howdens leased 8,000sq.ft. at Orbital Park on a 17 year lease quoted at £9.50 per sq.ft. in September 2015. A further lease of 7,936 sq.ft. at Ashford Business Park on a passing rent of £6.17 per sq.ft. and; also Unit 14 Henwood UK Business Centre, Ashford which let 2,298 sq.ft. to Rhine Cleaning.

Figure 4: Industrial Take-up in Ashford 2005-2015

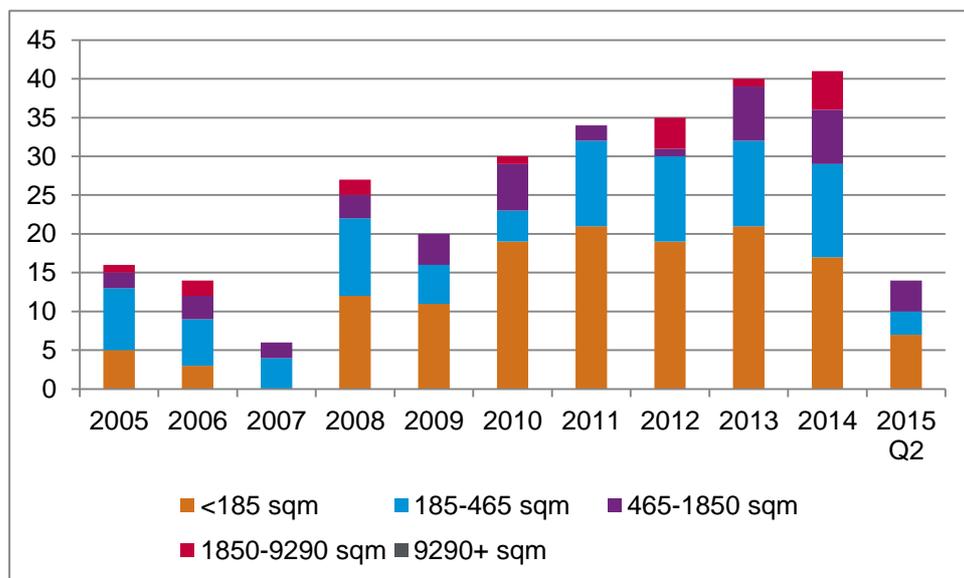


Source: EGi and GL Hearn

2.37 Figure 4 shows industrial take-up in Ashford during 2005-2015. This demonstrates that industrial take-up declined after the onset of recession in the period 2009-2011, before recovering strongly in 2012. Indeed, 2014 was a record-breaking year for the UK industrial and logistics sector according to Lambert Smith Hampton; it was also the strongest year for Ashford achieving a total industrial take-up of 20,204 sqm.

2.38 It should be noted that the increased levels of industrial take-up in 2012 and 2014 were driven by the take-up of larger industrial premises i.e. sizes 1,850 sqm-9,290 sqm. In 2014, 50.4% of total industrial take-up was represented by take-up in this size band. Since the recession the take-up of smaller industrial units, those below 185 sqm, has been relatively constant in the range of approximately 1,500-2,000 sqm.

Figure 5: Number of Industrial Space take-up deals



Source: EGi and GL Hearn

2.39 Figure 5 shows the number of industrial take-up deals distributed by size band. This conveys that generally most industrial take-up deals involve smaller premises of less than 185 sqm. This suggests a higher turnover in smaller sized industrial premises, which would be expected for small-medium sized enterprises. The figure also portrays that few industrial take-up transactions occur for industrial premises sized greater than 465 sqm. However, it is noted that take-ups of larger industrial spaces, for example, 465-1850 sqm increased in 2013 and 2014 demonstrating a growing market for industrial premises of this size. During the period 2005 to 2015 Q2, 135 out of a total of 277 (48.7%) take-ups were for industrial spaces sized less than 185 sqm.

2.40 Table 2 below shows the present availability of built industrial space by allocated size band in Ashford Borough. This demonstrates that supply is most limited for smaller sized industrial premises i.e. those less than 185 sqm. The data shows that there is 2.6 years of supply assuming the average take-up levels of the last decade continue. Clearly, there is greater market demand for smaller industrial premises. This is unsurprising as according to Lambert Smith Hampton (Industrial & Logistics Market Report 2015) there is a greater demand for small industrial spaces across the South East compared with other parts of the country. It should be noted that there is a significant supply of larger sized industrial premises, reflecting more limited demand for such premises.

Table 3: Availability of Industrial Space

Availability of Industrial Space	<185 sqm	185-465 sqm	465-1,850 sqm	1,850-9,290 sqm	9,290 sqm	Total Availability
Total (sqm)	3,157	11,142	21,135	17,123	0	52,557
10 Year Average Take-up	1,197	2,295	3,046	3,575	0	10,112
Notional Years' Supply	2.6	4.9	6.9	4.8	0.0	5.2

Source: EGi and GL Hearn

2.41 The above assessment is supported by analysis of Ashford's commercial property market produced by 'Locate in Kent' in October 2015. This reported that the availability (supply) of smaller industrial premises (up to 465 sqm.) is most limited. Locate in Kent's analysis shows that over the year from August 2014 to July 2015, the supply of industrial space declined by approximately 50% especially for smaller premises.

2.42 It should be noted that the available supply refers to existing built industrial space. It does not include land with potential for industrial development.

3 ASSESSMENT OF SELECTED EMPLOYMENT SITES

3.1 This section of the report provides an appraisal of the supply of employment land within Ashford Borough. It does not consider all employment land within the Borough - it focuses on employment sites at Ashford together with a selection of sites within the rural areas within the Borough, to inform development of the new Local Plan. The sites assessed include:

- Current or potential allocations; and
- Existing employment sites identified in Local Plan.

Site Assessment Methodology

3.2 Site surveys were undertaken by GL Hearn in September 2015 using a site assessment proforma which draws on best practice guidance¹ and the PPG. The site assessments addressed:

- The nature and intensity of use of the employment site;
- Road access, including access by HGVs and servicing of existing businesses;
- Access to local services/ amenities for employees;
- Physical constraints to the development and use of this site;
- Nature of any bad neighbour or adjacency issues;
- The age and quality of existing buildings;
- Public transport accessibility and adequacy of parking provision.

3.3 A general description of each employment site was prepared. The site survey included specific consideration of the quality of sites and floorspace and their future suitability to meet market demand.

3.4 We have reviewed the development potential of sites, the potential for intensification of use and potential for extension of existing sites (where applicable). Vacant land on existing sites has been recorded. Where development opportunities were identified, information was collected regarding the potential availability of land for development, market attractiveness of the site, and any known constraints (including infrastructure) which might impact upon the deliverability of development.

3.5 The assessments come with the caveat that neither a detailed investigation of land ownership and lease structures nor detailed development appraisals to assess viability at a site-specific level (in the absence of a development scheme) have been undertaken to inform conclusions on developability. GL Hearn advises that the Council liaise with landowners and developers to consider these issues in detail to inform any site allocations in the forthcoming Borough Plan to 2030.

¹ South East of England Partnership Board (2010) Economic and Employment Land Assessments Guidance

Sites Considered

3.6 The list below outlines the sites which have been assessed through this Employment Land Review. The sites were visited in September 2015.

Table 4: List of Employment and Potential Employment Sites Reviewed

Site	Location	Nature of Site	Site Area (ha)	Approx. Vacant Area (ha) for B Class Employment
Town Centre- Commercial Quarter	Urban	ATCAAP	6.34	2.50
Elwick Road	Urban	ATCAAP	3.61	0.00
Victoria Road Sites	Urban	ATCAAP	16.80	0.5 – 1.0
Cobbs Wood Industrial Estate	Urban	Core Strategy/Existing Site	29.30	2.40
Brookfield Industrial Estate	Urban	Core Strategy/Existing Site	9.89	0.00
Ellingham Way Industrial Estate	Urban	Core Strategy/Existing Site	6.64	0.00
Beaver Road Industrial Estate	Urban	Core Strategy/Existing Site	4.03	0.00
Kingsnorth Industrial Estate	Urban	Core Strategy/Existing Site	13.07	1.00
Chilmington Green	Urban	CGAAP	299.82	1.00
Orbital Industrial Park	Urban	Core Strategy/Existing Site	47.41	8.65
Waterbrook	Urban	CGWAAP	N/A	15.00
Sevington	Urban	Core Strategy/Existing Site	49.89	38.7
Cheeseman's Green/ Finberry	Urban	CGWAAP	185.68	0.7-1.0
Ashford Business Park	Urban	Core Strategy/Existing Site	8.68	0.00
Newtown Works	Urban	ATCAAP	8.38	0.20
Henwood Industrial Estate	Urban	Core Strategy/Existing Site	18.00	1.00
Mace Lane Industrial Estate	Urban	Core Strategy/Existing Site	1.47	0.00
Eureka Business Park	Urban	Core Strategy/Existing Site	42.20	20.7
Givaudan	Urban	Core Strategy/Existing Site	15.76	0.00
Willesborough Industrial Estate	Urban	Core Strategy/Existing Site	1.53	0.00
Evegate Business Centre, Smeeth	Rural	Core Strategy/Existing Site	1.31	0.32
Counter Farm, Woodchurch	Rural	Core Strategy/Existing Site	0.87	0.00
Leigh Green Industrial Estate	Rural	Core Strategy/Existing Site	2.40	0.00

Site	Location	Nature of Site	Site Area	Approx.
Bethersden Business Centre	Rural	Core Strategy/Existing Site	1.29	0.00
Pivington Mill, Pluckley	Rural	Core Strategy/Existing Site	2.43	0.00
Total Available Land				92.7 – 93.5
ATCAAP= Ashford Town Centre Area Action Plan				
CGWAAP= Cheeseman's Green and Waterbrook Area Action Plan				
CGAAP = Chilmington Green Area Action Plan				

Sites in/around Ashford

3.7 We set out below the findings below from the site assessments in and around the Ashford Urban Area. This follows the structure set out in the table above.

Town Centre-Commercial Quarter



Site Area (ha)	Vacant Area (ha)	Nature of Vacant Land
6.34	2.50	Brownfield site

3.8 The Commercial Quarter encompasses Station Road as its western boundary and extends to Tannery Lane which forms its northern boundary. The Stour River forms the eastern boundary and the railway line forms the southern boundary. It adjoins the domestic station and the station forecourt and currently contains various small commercial buildings along Dover Place, together

with International House, Saturn House, the Royal Mail sorting office and the Kent Woolgrowers site. The remainder of the policy area is mainly car parking. It is designated in the Ashford Town Centre Area Action Plan (Policy TC9) for office led mixed-use redevelopment. The total site area is approximately 16 acres/6.5 hectares.

- 3.9 The Commercial Quarter is planned to be an office led mixed-use development which seeks to maximise the advantages of its location. It is intended to be a business hub in Ashford Town Centre, adjacent to the domestic and international railway stations. The Town Centre AAP aims to stimulate major investment opportunities, create several thousand jobs, and proposes up to 590,000 square feet of office space and 150 apartments for this area. Outline planning permission (ref: 11/00382/AS) was granted for the construction of a mixed use development on 15 March 2013 and further permission (ref: 14/00750/AS) was granted for public realm works on 20 August 2014. Indeed, work on the first phase of the new public realm around International House and Dover Place is continuing at the time of writing (October 2015).
- 3.10 In September 2015, Ashford Borough Council appointed Kent developers, Quinn Estates Ltd and George Wilson Holdings Ltd to develop the first new office building in the Commercial Quarter. It aims to demonstrate demand. Construction works are set to commence in 2016 and are expected to last eighteen months.
- 3.11 The Commercial Quarter is a highly accessible location, including the domestic station and adjacent International Station. It is situated along the main arterial A2042 road through the town, providing access to Junction 9 of the M20. Access to the site is good – both by road and public transport; with a high speed link to London by rail in 37 minutes.
- 3.12 It was noted that there was significant congestion especially on the junction between the domestic station and Station Road during peak times. This appeared to be caused by a restricted flow of traffic exiting the station; this may possibly be addressed by adjusting the timing of the existing traffic signals. This will need to be assessed as development of the Commercial Quarter progresses.
- 3.13 The underlying concept of the Commercial Quarter is to stimulate market demand for office space with sufficient critical mass for occupiers to potentially benefit from their collective presence. It is apparent that there are currently some vacant office premises in the area. For example, Templar House has 10,313 sq. ft. of space available to let and Kent House has office suites available to lease ranging from 430 sq. ft. to 5,265 sq. ft. International House appeared to be nearing full occupation. However, the current market cannot be representative of future demand for higher grade office when there is no such comparator scheme has previously been constructed in Central Ashford. The first phase of development will test the market for Grade A floorspace at this location.

- 3.14 This site benefits from stronger accessibility to London than other locations in East Kent. These should support investment. However, there is a limited stock of larger office occupiers in the town. To maximise take-up, proactive marketing will be needed to support inward investment. A range of floorspace sizes should be provided.
- 3.15 To support delivery, it will be important that delivery of office floorspace at out-of-town locations is managed in order to focus office investment towards this area, as the key site.

Recommendation: A landmark location within Ashford. We advocate retention of the site for strategic office investment as part of mixed use development as proposed, reflecting the excellent transport accessibility and forthcoming high quality public realm. This site should be prioritised as the main B1a office development location in the Town.

Elwick Road, Ashford



Site Area (ha)	Vacant Area (ha)	Nature of Vacant Land
3.61	0.0	Brownfield site

- 3.16 This proposed regeneration scheme involves the redevelopment of a brownfield site covering 3.48 hectares located within Ashford Town Centre, to the south of Elwick Road. The site's previous uses span several redevelopments including a cattle market and warehouses. The site was wholly cleared in 2014.

- 3.17 The scheme incorporates a town centre cinema offer with places to eat and drink around a new square. This first phase of the Elwick Place development, opposite County Square, is intended to encourage greater vitality in the town during the day and evening.
- 3.18 The site encompasses land on the south side of Elwick Road, from the Beaver Road Bridge to the Gasworks Lane. It is the largest development site in the Town Centre. Elwick Road forms a corridor linking the Town Centre and County Square Shopping Centre with the transport hub at the stations. The development intends to create a planned transition between the established town centre and the proposed expansion planned to the south of the town. A new Ashford College campus is due to open in 2017 on the corner of Elwick Road and Station Road.
- 3.19 According to the Ashford Town Centre Area Action Plan, the site covers 3.61 acres of prime town centre space in total. The AAP anticipates development of 22,000 sqm. of retail and leisure space, 5,000 sqm. of commercial space and 300 residential units.
- 3.20 A planning application (ref: 15/01195/AS) was submitted in September 2015. This proposes a mixed use, leisure-led scheme that will comprise: a cinema, restaurants and cafes, a hotel and residential units. The total floorspace for the entire site has been stipulated to be 24,500 square metres. The maximum floorspace proposed for each use is specified as: A3 Restaurant and cafes- 3,000 sqm; C1 Hotel- 2,000 sqm; C2/C3 Residential 15,000 sqm.; and D2 Cinema 4,500 sqm. No B class employment floorspace is envisaged.
- 3.21 The site has excellent transport accessibility via the train stations and town centre ring road connecting to the M20. The site presents no noticeable development constraints; it mainly contains hardstanding which slopes downwards to the railway line at the perimeter of the site. However, there is a requirement to leave an access corridor at the rear of the site closest to the railway line to safeguard access to the HS1 track for any required works.
- 3.22 **Recommendation: The proposed mixed-use redevelopment of the site should be supported. The site is of critical importance for the long-term growth of Ashford Town Centre and the scheme will stimulate the service sector of the economy. The proposed development will support a range of employment opportunities for the local population. Within the Town Centre it is appropriate to focus office floorspace within the Commercial Quarter. No B-class employment floorspace should be expected to be delivered on this site.**

Victoria Road Sites, Ashford



Site Area (ha)	Vacant Area (ha)	Nature of Vacant Land
16.80	0.5-1.0	Brownfield site

3.23 There are several sites on Victoria Way (Victoria Road) which are significant for future development in Ashford. They collectively form part of the Southern Expansion Quarter identified in the Ashford Town Centre Area Action Plan. The sites include: the former Powergen Site, Land North and South of Victoria Road and Gasworks Lane. All sites are close to the Town Centre and Station.

3.24 **Powergen Site:** This site comprises a north and a south section; dissected by the newly completed Victoria Road. It is within flood zones 2 and 3. The Powergen Site North is a derelict brownfield site of circa 1.69 hectares, comprising a mixture of hardstanding and scrub land. The railway line is situated to the north.

3.25 The Powergen Site South is a similar brownfield site of circa 3.52 hectares. The Great Stour River is situated at the southern edge of the site. The site is serviced by utilities and other appropriate infrastructure from Victoria Road. Both sites are serviced and ready for development.

3.26 The planning history of the Powergen site (both north and south- total) is as follows: Ref: 05/01716/AS- A mixed-use development comprising total gross floorspace of 111,572 sqm, 1,002 residential units (382 units- north; 620 units- south) and 8,229 sqm of commercial floorspace

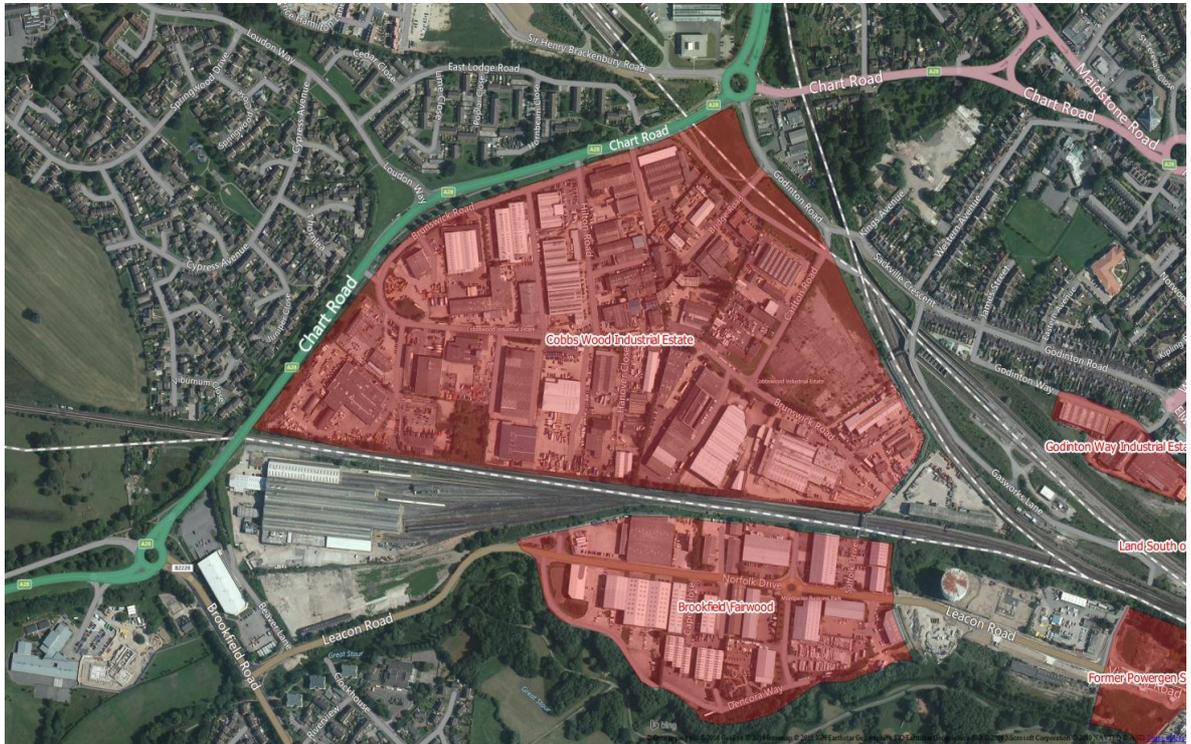
including a convenience goods supermarket up to 3,716 sqm. Outline permission was granted at appeal in 2008. Reserved matters were approved in application 11/00629/AS and renewal of the outline permission was withdrawn in January 2012. A new application (15/01671/AS) has recently been submitted for development of this site proposing 660 residential units together with a retail kiosk/café and a public surface car park. No provision of B-class employment floorspace is proposed.

- 3.27 **Land North and South of Victoria Road:** This site is allocated in the Ashford Town Centre Area Action Plan. The total site area is approximately 8.94 hectares. The railway line is situated at the northern edge of the site, on the western side of the site (Victoria Crescent and George Street) there are a mix of industrial units alongside period dwellings; Beaver Road and the International Station are located to the east of the site. It is a cleared site containing hardstanding and scrub land. Flood Zone 2 and 3 are immediately to the south of the site. Utilities and other associated infrastructure should be available at the site. Therefore, the site can be readily developed.
- 3.28 The planning history of the land north and south of Victoria Road is as follows: Ref: 04/02195- An outline application (with all matters reserved) for a mixed-use development incorporating up to 355 residential units comprising a mix of 1 and 2 bedroom units, retail food and drink (A1, A2, A3, A4, A5) up to 1,731 sqm, business or education 19,285 sqm, with an additional 1,595 sqm of business/leisure floorspace, and hotel/leisure up to 119 bedroom hotel with facilities (6,169 square metres) [granted April 2008]. Ref: 07/00116/AS- full planning permission- Land fronting Beaver Road and Victoria Road, Ashford, Kent- the construction of circa 20,845 sqm education floorspace and associated access, landscaping and enabling works- permitted March 2008. 08/01122/AS- In November 2011, Bellway stated they had no interest in pursuing the application due to termination of their agreement with the HCA. A mixed use development is now being considered for the site, but it is not expected that this will include B-class employment floorspace; this is expected to use the 2.64 hectares of vacant sites North and South of Victoria Road.
- 3.29 **Gasworks Lane.** This site is situated at the western end of the Southern Expansion Quarter between the railway line and Leacon Road Industrial Estate; the site covers approximately 2.65 hectares. In the Ashford Town Centre Area Action Plan, the site is allocated for residential development to include 300 residential units. It is also conveyed that some limited employment use may occur at the western end of the site, for example, in the form of some mixed-use buildings or smaller scale buildings appropriate for light industrial or office uses- total circa 2,000 sqm. A limited level of employment floorspace could therefore in theory come forward on this site; but it is more likely that residential development will take place.
- 3.30 It should be noted that a large proportion of the western and southern parts of the Southern Expansion Quarter (Victoria Road) are situated within Flood Zones 2 & 3. Therefore, development

proposals in these areas will be required to mitigate the potential flood impact both on and off-site in accordance with policy CS19 of the adopted Core Strategy.

- 3.31 The sites on Victoria Road are in a readily accessible location in close proximity to and within walking distance of the Town Centre and the International Station. Victoria Road provides good vehicular access to the main routes into and out of Ashford via the A28 Chart Road and A2042 Beaver Road leading to Junctions 9 and 10 of the M20.
- 3.32 There is a primary school on the western edge of Victoria Road (to the east of Gasworks Lane). Victoria Crescent comprises a mixture of period dwellings and some existing industrial uses, for example, Xylem Water Solutions UK. Other occupiers in the vicinity include: Watlings Tyres, Andrews Tyres, Tyre Web, Silcock, Meade Kitchens and Bathrooms, RTI Rail and Andrew Sykes Group reflecting a broad mix of B class uses.
- 3.33 There was evidence of vacancies across some of the existing premises in this area. For example, there was a site to let offering 6,000-12,000 square feet of employment space. There were also some vacant car garages. The majority of premises are generally in reasonable to poor condition.
- 3.34 **Recommendation: Whilst available land within this area is suitable and could potentially accommodate new B-class employment development, it is also a suitable location for other uses, including residential. It is envisaged that mixed-use development will take place, but that the provision of B-class employment floorspace within this will be limited.**

Cobbs Wood Industrial Estate



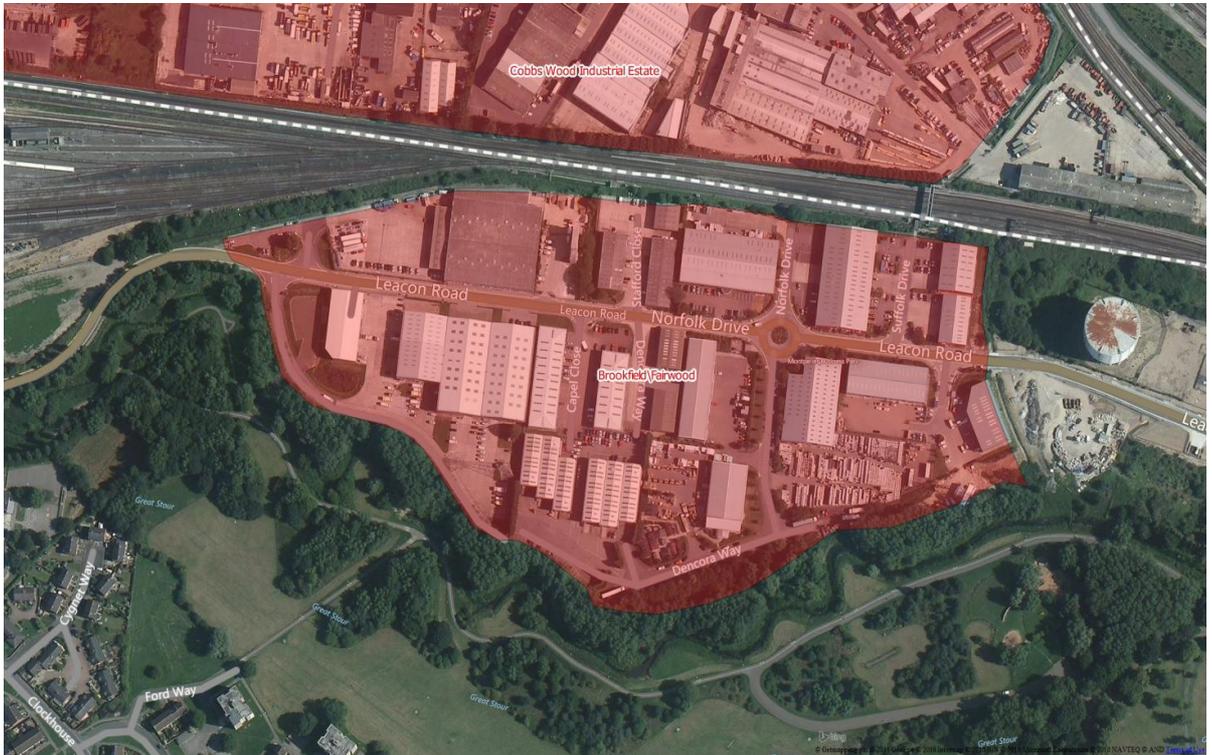
Site Area (ha)	Vacant Area (ha)	Nature of Vacant Land
29.30	2.40	Brownfield site

- 3.35 This a large industrial estate, covering approximately 29.30 hectares, located in the north west of Ashford. It has direct access from the A28 Templar Way and Chart Road and is readily accessible from M20 Junction 9 which is approximately 1 mile away. The Town Centre is about a fifteen minute walk away.
- 3.36 The internal roads demonstrate significant activity resulting in congestion and restricted traffic circulation. This was exacerbated by on-street parking creating potential difficulties for heavy goods vehicles (HGVs) when turning. It appeared that at several premises dedicated on-site parking provision was full.
- 3.37 The industrial estate contains an assortment of B1, B2, B8 and *Sui Generis* Uses. Key occupiers include: Dunlop (Bearings, Transmissions and Linkages), Biffa and Viridor (waste and recycling), Kent County Council- Ashford Household Waste Recycling Centre, Finning UK (Caterpillar/CAT plant equipment) and a range of vehicle hire and servicing facilities including Fiat and Volvo Service Centres.
- 3.38 The majority of premises were mainly built circa 1970-1989 with some new modern units dating from the 1990s and later. The earlier buildings are predominantly of a poor quality, the newer

premises appear to be in reasonable condition. The quality of the environment is characterised by the estate's building stock, which varies between reasonable and poor. There is potential for refurbishment of some of the units. There are some 'dirty' industrial activities undertaken at some of the sites, however there are no specific bad neighbour uses.

- 3.39 There is potential for further development and three vacant sites.
- 3.40 Two sites are located on corner of Bridge Road and Carlton Road. Firstly, a 5.31 acre (2.15 ha) site, with hardstanding thereby likely to be previously developed, and secondly a 1.41 acre site, both jointly marketed by GVA and Taylor Riley Stafford. The high speed rail line runs under the latter site (1.41 acres), and restricts their development potential as no significant structure/ weight can be accommodation above the rail line. On this basis we would recommend that this land, whilst it has some development potential, should be excluded from the assessment of supply/demand balance given the prevailing constraints to development.
- 3.41 There is a further vacant site on the corner of Hilton Road and Brunswick Road (0.7 ha), previously occupied by ITW GSE Houchin. This comprises a 67,000 square foot factory/ warehouse unit, marketed by Core Commercial. We consider that this site has potential for employment redevelopment.
- 3.42 In addition, at Brunswick Park, there was evidence of some vacant trade counters (Nos. 2, 3 and 14 were available to lease, marketed by Taylor Riley Stafford).
- 3.43 The vacancy level at this site is evidently higher than for other employment sites in the Borough. However, the site retains a critical mass of employments uses, and plays a strategic role in providing land for price sensitive occupiers and dirt/noise generating industrial activities.
- 3.44 **Recommendation: This is a general industrial estate which is in a strong accessible location with some substantial vacant premises at present alongside some potential for further development on vacant land. The quality of the building stock and obstacles to traffic circulation may discourage some occupiers, although this may be balanced by occupiers seeking relatively low cost premises. The site should be retained for employment use (classes B1, B2, B8 and employment-generating sui generis uses).**

Brookfield Industrial Estate



Site Area (ha)	Vacant Area (ha)	Nature of Vacant Land
9.89	0.00	Brownfield

- 3.45 The Brookfield Industrial Estate covers an area of approximately 9.89 hectares. It is situated on the western side of Ashford. It is accessed from Leacon Road, via a roundabout on the A28 Chart Road which provides access to the M20 Junction 9 which is circa 1.5 miles away from the estate.
- 3.46 The industrial estate forms a relatively self-contained site. It is confined by railways lines to the north and the Great Stour River to the south. This southerly element of the estate may be susceptible to flooding. The estate is also traversed by overhead electricity pylons.
- 3.47 There are some residential areas to the south east of the site; and to the south west of the site along Brookfield Road.
- 3.48 There is reasonable access for the internal and external circulation of vehicles; however some measures have been implemented to prevent HGV parking. There are some bus service routes along Leacon Road; it is a relatively accessible location.
- 3.49 The industrial estate contains a range of modern high quality industrial units alongside some older premises which appear to be mostly in reasonable condition. The estate comprises a wide range of

uses. There are a range of B1 and B2 operations including some trade counter activities and some limited B8 activity. There is also a Hanson concrete/cement works plant.

3.50 Key occupiers include: Griffin & Brand Ltd (a supplier of table grapes), Hanson Concrete, Thermo Fisher Scientific (they occupy several units and produce life sciences' technologies), Chart Fencing and Chart Timber Buildings.

3.51 There was some evidence of vacancy at the industrial estate. For example, at Stafford Close, 9 of 14 units (1,200 square feet each) appeared to be vacant and available for use. These would be suitable for light industrial and trade counter uses. At Montpelier Business Park, 2 of 10 units (4,600 square feet each) were available to let. A 3,700 square feet warehouse was also available to let. Therefore, at the time of assessment, vacant space on the estate totalled approximately 23,700 square feet.

3.52 Land to the west of the existing employment site is allocated for residential development. There is no significant developable land within the boundaries of the estate.

3.53 **Recommendation: The Brookfield Industrial Estate is a reasonably successful employment site. It is well located and accessible in close proximity to the A28 Chart Bypass. The estate is suitable for continued B1, B2 and B8 uses.**

Ellingham Way Industrial Estate

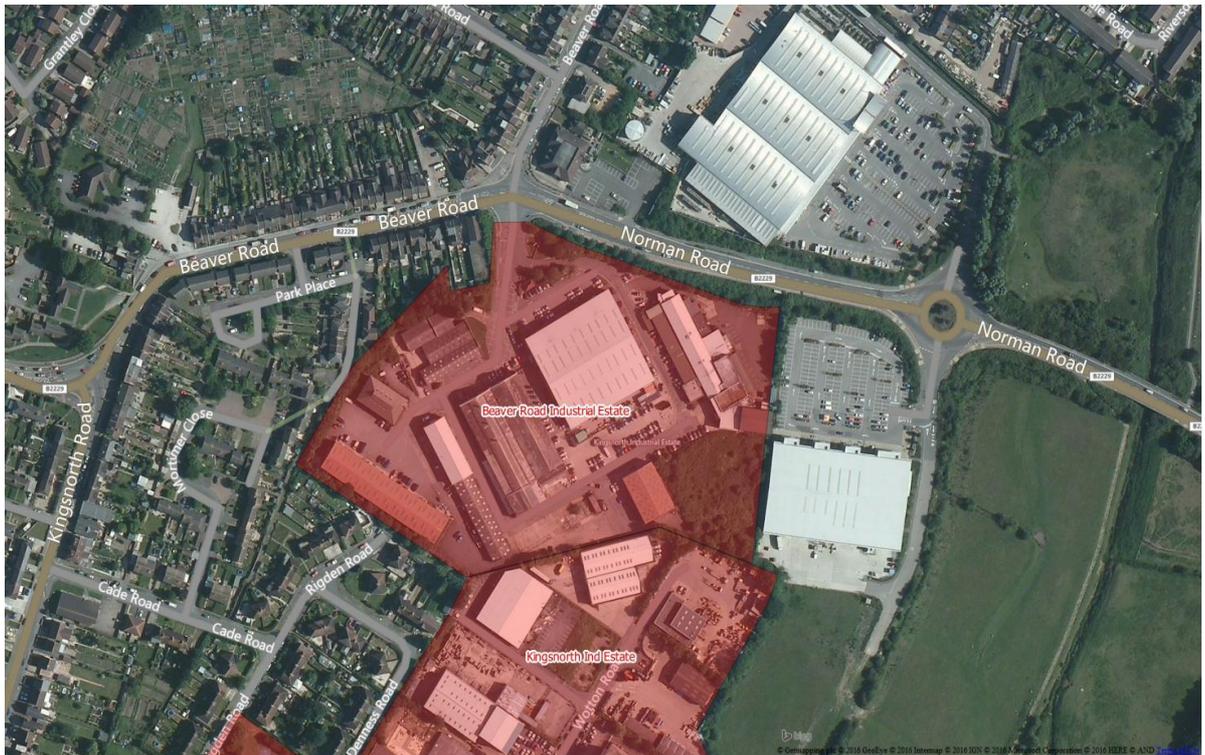


Site Area (ha)	Vacant Area (ha)	Nature of Vacant Land
6.64	0.00	Brownfield site

- 3.54 The Ellingham Way Industrial Estate is an industrial area dating from the 1970s-1980s covering an area of 6.64 hectares, situated on the southern side of Ashford. It is accessed from the A2042 Romney Marsh Road. It is located approximately 3 miles away from M20 Junction 10 which is accessed via the A2070 Bad Munstereifel Road.
- 3.55 The site is bounded by Wotton Road to the north, Kingsnorth Road to the south and west, and the East Stour River to the east. The eastern aspect of the estate is consequently liable to flooding. The western half of the industrial estate is in close proximity to residential dwellings along Kingsnorth Road.
- 3.56 A broad range of uses are present on the industrial estate. Key occupiers include: Jewson (builders merchants), Integrated Technologies Ltd (medical device manufacturing) and Haynes Trucks Ltd (an Iveco Trucks dealer and service centre). The remainder of the estate contains lower grade activities such as a scrap metal merchant, several car servicing and repair garages and a mixture of B1 and B2 workshop uses. There appeared to be no B8 Storage and Distribution uses on the estate.
- 3.57 The external and internal access to the industrial estate is satisfactory. The circulation of vehicles is acceptable. However, there are some limitations concerning the turning of heavy goods vehicles (HGVs). There is some evidence of on-street parking.
- 3.58 The quality of buildings and environment is generally reasonable; although, there are some poorer quality buildings which are generally associated with lower value activities.
- 3.59 At the time of assessment there was no substantive evidence of unoccupancy on the site. There is a strong level of occupation across the estate.
- 3.60 There are no further significant opportunities for development given that planning permission has been granted for three additional units as infill (Land rear of units 1 to 5, between 5 and 6) being implemented by the council (Application: 14/01376/AS).
- 3.61 In the medium-term, the buildings which are of a lower standard may become vacant. These may present opportunities for refurbishment or redevelopment.
- 3.62 **Recommendation: This industrial estate comprises a range of uses, although beyond the key occupiers these uses tend to be of lower value. The industrial estate provides opportunities for smaller scale businesses for which cost is a key concern. We recommend**

that policy supports the continued use of this site for a range of business uses (B1, B2, B8) and associated employment-generating sui generis uses.

Beaver Industrial Estate



Site Area (ha)	Vacant Area (ha)	Nature of Vacant Land
4.03	0.00	Brownfield site

- 3.63 The Industrial Estate covers an area of approximately 4.03 hectares on the southern side of Ashford. It is accessed from Beaver Road and Norman Road which can be entered after exiting a roundabout from the A2042. It is located approximately 4 miles away from M20 Junction 10 which is accessed via the A2070 Bad Munstereifel Road.
- 3.64 The site is bounded by Norman Road and Beaver Road to the north, Kingsnorth Road B229 to the north west, west and south west, Gallagher Retail Park to the east and Kingsnorth Industrial Estate in the south. The areas to the north and west of the site i.e. Beaver Road, Norman Road and Kingsnorth Road, are residential areas. The estate is fully serviced and managed.
- 3.65 The external access to the estate is acceptable. The internal access and flow is limited by car parking in some parts, which is particularly restrictive for heavy good vehicles (HGVs).
- 3.66 The key occupiers include: BWE Ltd (manufacturer and research and development of cold welding machines), Graham (plumbers' merchant), Kent and Medway NHS Wheelchair Service Assessment

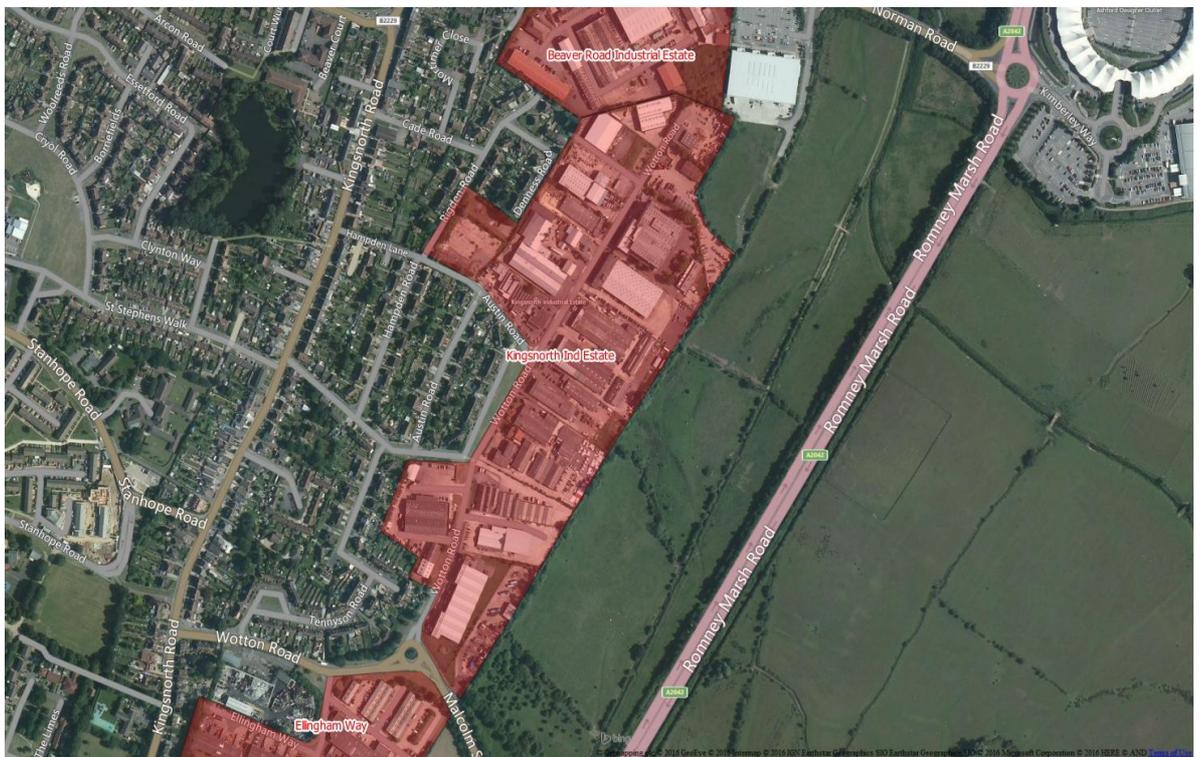
Centre and SBE Ltd (undertake the repair and refurbishment of electronic devices). The estate generally contains B1 and B2 uses, although there are also some smaller trade counter activities.

3.67 The quality of the buildings and the environment is generally average. The McLaren Foods warehouse premises, currently vacant, has been granted planning permission for conversion to retail warehousing (Planning application reference: 12/01295/AS); this has not been implemented.

3.68 Previously, planning permission has been granted for the construction of light industrial units at the rear of Unit B (Planning application references: 00/00315/AS and 05/01237/AS); these have not been delivered. Furthermore, there may be some prospects to refurbish some of the existing units in the future. The estate is reasonably attractive to occupiers, but improvement in its quality and environment may enhance its market standing.

3.69 **Recommendation: This is an industrial estate of reasonable quality with some important occupiers. The site should be supported for continued B-class employment uses.**

Kingsnorth Industrial Estate



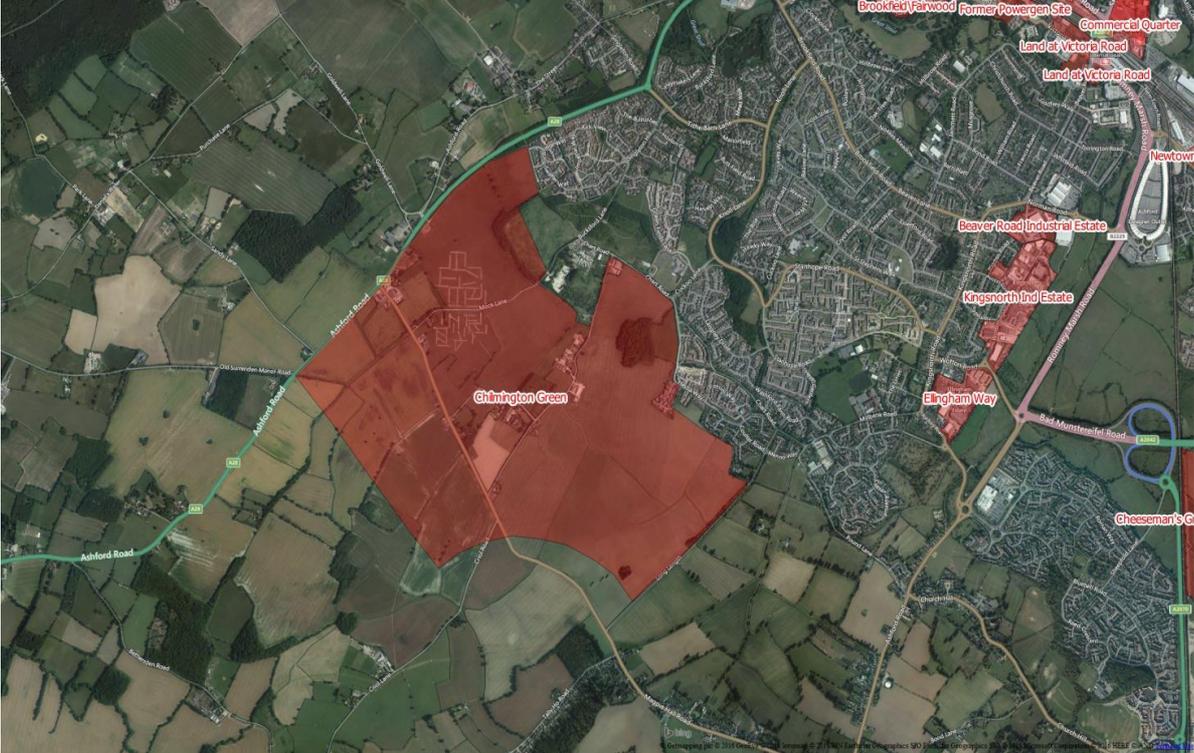
Site Area (ha)	Vacant Area (ha)	Nature of Vacant Land
13.07	1.00	Brownfield site

3.70 The Kingsnorth Industrial Estate covers an area of approximately 13 hectares. It is an older industrial estate located in the south of Ashford. It is in relatively close proximity to the industrial

estates at Beaver Road and Ellingham Way. It can be accessed via Wotton Road, Norman Road and Kingsnorth Road. The estate is located about 3.5 miles from M20 Junction 10 which is accessed via the A2042 and A2070. There is a residential area on the western/opposite side of Wotton Road.

- 3.71 The external access to the estate is acceptable, however internal circulation of traffic was somewhat restricted by on-street parking which has implications for the access and turning of heavy goods vehicles (HGVs).
- 3.72 The estate comprises a mix of B class uses with a greater proportion of industrial occupiers. There is an above average representation of food manufacturers on the estate. Key occupiers include: Bradleys (bakery and food service distribution), Dairy Crest (dairy products) and Lok'nStore (self-storage).
- 3.73 The general quality of the environment is reasonable. However, the quality of the buildings is more varied. There are some newer high grade buildings, surrounded by buildings of a middling quality alongside some poorer quality older buildings.
- 3.74 Businesses on the estate generate noise, smell and air pollution along with HGV traffic. This may impact residents opposite the industrial estate on Wotton Road. Further mitigation measures may be required when considering future intensification of industrial uses.
- 3.75 The estate is largely built out with no genuine opportunity for future development, despite a few vacant units. The vacant sites include: City Link's former premises (a 1980s unit- approximately 5,000 sq.m.); the Amber Scaffolding Site (a 2,509 sq.m site with hardstanding); and the Emmerich (Berlon) Ltd site, a factory with offices was available to let (2,858 sq.m.). There is potential in the medium term for some of the buildings to be refurbished. There was approximately 10,400 sq.m. (1 hectare) of vacant space at the industrial estate.
- 3.76 **Recommendation: This is a reasonable quality older industrial estate that is well occupied. The current employment use should be supported at the site and the take-up of vacant premises should be encouraged. Policy should continue to support B-class and sui generis employment-generating uses on this site.**

Chilmington Green



Site Area (ha)	Vacant Area (ha) – with Employment Development Potential		Nature of Vacant Land
299.82	1.0		Greenfield Site

3.77 The Chilmington Green Area Action Plan (AAP) sets out a policy framework to deliver a major urban extension to Ashford of up to 5,750 homes and 1,000 jobs, over a period of twenty five years. The AAP was adopted in July 2013. It contains policies on several topics concerning the development, including community infrastructure, transport improvements, ecology and describes the character which the different parts of the site should have. This size of the site is approximately 299.82 hectares.

3.78 Outline planning permission for development was granted in October 2014 (Reference: 12/00400/AS). The application specified: up to 5,750 residential units, in a mix of sizes, types and tenures; up to 10,000 m² (gross external floor space) of Class B1 use; up to 9,000 m² (gross external floorspace) of Class A1 to A5 uses; Education (including a secondary school of up to 8 hectares and up to four primary schools of up to 2.1 ha each); Community Uses (class D1) up to 7,000 m² (gross external floorspace); Leisure Uses (class D2) up to 6,000 m² (gross external floorspace).

- 3.79 The permission supports up to 10,000 square metres (gross external area) of B1 (business) floorspace, which could range from offices and studios/workshops to light industrial space.
- 3.80 Employment use has been proposed for three general locations: within the District Centre- to be small scale B1 floorspace, primarily above “A” class retail units; to the north of the District Centre, two storey B1 use buildings suitable for a mix of professional offices, studios/workshops and light industry are envisaged. In the two local centres, provision is to be made for small scale B1 floorspace. It is explained that if B1 floorspace is combined with jobs in retailing, leisure, community and the education sectors, it is anticipated that total new employment will be approximately 1,200 FTE excluding people working from home. We have assumed this would yield provision of an equivalent of 1.0 ha of employment floorspace based on a notional plot ratio of 1.0.
- 3.81 The location is not suitable for more intensive uses (for example, B2 General Industrial and B8 Storage & Distribution) due to its anticipated residential setting, its distance (approximately 3.5 miles) from the M20 and lack of accessibility along relatively narrow roads.
- 3.82 **Recommendation: The site has been principally identified for residential development as demonstrated by the AAP and the permitted planning application. Therefore, it is appropriate to target employment uses within the B1 use class, in addition to the service sectors (A1 to A5) required to provide for local residents.**

Orbital Business Park



Site Area (ha)	Vacant Area (ha)	Nature of Vacant Land
47.41	8.65	Brownfield site

- 3.83 Orbital Park is located on the south east of Ashford. It covers an area of approximately 48 hectares. It is located approximately 1 mile away from M20 Junction 10 via the A2070, accessed from the A2070 by a roundabout and also Crowbridge Road.
- 3.84 The site is bounded by railway lines, the A2070, the East Stour River to the south west, and residential areas to the north.
- 3.85 This is a high quality business park in a strategic location close to the M20; and indeed is one of the highest quality employment sites in the town. It includes a mix of B1, B2 and B8 uses in addition to several car dealerships/showrooms with broadly high value occupiers. There are also some trade counter uses.
- 3.86 The quality of the buildings and environment is very good, reflecting the recent construction of the park. Key occupiers include: Kent Pharmaceuticals (pharmaceutical manufacturer and wholesaler), Meggitt Target Systems (supplier of defence weapon systems) and Hobbs Parker Stall Market (a cattle market) and Boot Fairs. It is evident that the site has successfully attracted major international businesses.
- 3.87 The external and internal access to premises is good and traffic circulation appeared to be satisfactory. However, it is known that there is congestion during peak times along the A2070 route. This should improve on delivery of Junction 10a.
- 3.88 There was evidence of some limited vacant space. For example, in the Oak Trees Business Park, five units (500 square feet; 46.45 square metres each) were vacant out of a total of 14 units (185.8 square metres). Parking was limited around that section of the site.
- 3.89 Furthermore, there appeared to be some development opportunities at Orbital Park. Development sites are identified in the Urban Sites and Infrastructure Development Plan document and include vacant plots in the 'central island' of the site (enclosed by The Boulevard, Monument Way and the Long Barrow).
- 3.90 There is approximately in excess of 8.65 hectares of potentially developable land at Orbital Park. The delivery of this amount of space is dependent on two interrelated factors: market viability and road infrastructure capacity.
- 3.91 However, there were only two sites that were being actively marketed. These were two plots available for design and build opportunities, both located near the South East Coast Ambulance

Service- Ashford Ambulance Make Ready Centre at the south eastern corner of the park. Plot 1 was marketed to be 4,939 square metres and Plot 2 up to 19,384 square metres (a total of 24,323 square metres of potential build space). It appeared that both sites were serviced and deliverable in the near future. We believe these sites are being partially developed for 55,000 square feet of (5,110 square metres) industrial space and are being marketed by Strutt and Parker and Altus Edwin Hill.

- 3.92 **Recommendation: This is a key strategic employment site in Ashford. It is an attractive location for high value occupiers. Although, much of the park has now been built-out, there is further potential for development. We recommend that the site is strongly supported for continued employment use (B1, B2, B8). Delivery of M20 Junction 10A should support build out of remaining land.**

Waterbrook



Site Area (ha)	Vacant Area (ha)	Nature of Vacant Land
N/A	15.00	Brownfield site

- 3.93 The Waterbrook site is situated in the south east of Ashford, south of the A2070 and M20 Junction 10. It is accessed via Waterbrook Avenue.

- 3.94 The main existing employment uses are a truck stop, which operates 24 hours a day and occupies approximately 5 hectares of the site, and the Kent Invicta Chamber of Commerce office which is situated at Ashford Business Point.
- 3.95 A planning application for Phase 1 of Waterbrook Park (Ref: 11/01330/AS) has been approved. This permits the development of a vehicle testing facility, a vehicle and plant storage/maintenance facility and class B1, B2 and B8 small business units together with associated highway and earthworks on land. The masterplan for Phase 1 includes a linear park and major spine road infrastructure connecting to land to the east. The site developer, GSE group, is promoting a further phase of development for mixed use.
- 3.96 There has been previous planning permission granted for over 5 hectares of land on the north-eastern part of the site for a waste transfer station and minerals operations at the existing rail head.
- 3.97 The Core Strategy stipulates 15 hectares for employment use.
- 3.98 The main constraints impacting the delivery of the site include: flood risk from the East Stour River and guarding associated flood plain biodiversity with regard to protecting wetland species. However, there are substantive transport constraints, although nominally the site benefits from excellent strategic road access; capacity at M20 Junction 10 is a key limiting factor on development potential in the short-term; although the proposed Junction 10A may enable additional development to come forward in the medium term. In addition, the A2070 may require further upgrades in order to accommodate increased levels of traffic.
- 3.99 **Recommendation: This is a major development site within Ashford Borough. It is situated in a potentially very accessible location in close proximity to the M20. We support the promotion of this site for B1, B2 and B8 use in the medium term, in accordance with the timetable for the completion of M20 Junction 10A.**

Sevington



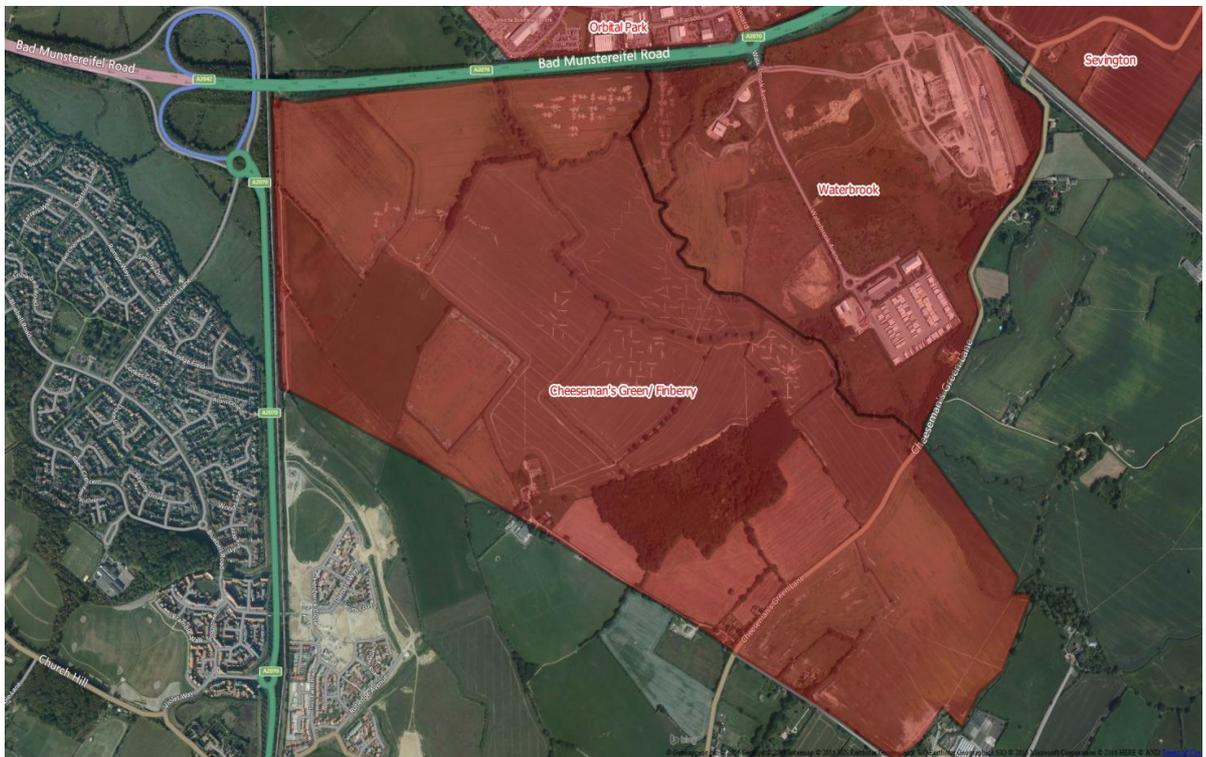
Site Area (ha)	Vacant Area (ha)	Nature of Vacant Land
49.89	38.7	Open space

- 3.100 The Sevington site is prominently located in close proximity to M20 Junction 10 along the A2070, to the east of the Waterbrook site. The site covers approximately 49.89 hectares.
- 3.101 A planning application (Ref: 14/00906/AS) was submitted in August 2014. The application seeks permission for a mixed use development comprising: up to 140,387 sqm Class B8 use; up to 5,239 sqm comprising mixed B1c (light industrial) / B8 (storage & distribution) floor space of 3,706.6sqm (including 959sqm of operational mezzanine); with ancillary retail (A1) 873.7sqm, and ancillary office (B1a) of 658.7sqm; up to 5,390 sqm Class B1c; up to 5,150 sqm Class B1a: up to 1,450 sqm Class A3 and or Class D1 use.
- 3.102 The site's accessibility and overall market attractiveness will improve significantly when M20 Junction 10A is constructed. However, it is feasible for some limited development to come forward at Sevington prior to construction of M20 Junction 10A due to the interim improvements completed in 2007.
- 3.103 This will be a key employment site in Ashford when the necessary transport infrastructure is developed. It will be suitable for a broad range of employment uses including large B8 operations

together with broader B-class employment uses. However, given its proximity to the M20, there is likely to be strong demand for B8 storage and distribution uses.

- 3.104 **Recommendation: This site presents considerable potential for employment use in a strategic location subject to market demand. Delivery of a new motorway junction is necessary to unlock the site for development. It would be suitable for B-class employment uses. A limited amount of development can come forward before delivery of M20 Junction 10A. The site is of strategic significance in particular for meeting demand for B8 warehouse/ distribution floorspace.**

Cheeseman’s Green/ Finberry



Site Area (ha)	Vacant Area (ha)	Nature of Vacant Land
185.68	0.70-1.00	Open space

3.105 Cheeseman’s Green/Finberry is located to the south of Ashford and is accessed from the A2070 Bad Munstereifel Road. The site covers approximately 185.68 hectares.

3.106 Outline planning permission (Ref: 02/00278/AS) has previously been granted for the ‘Land at Cheeseman’s Green, Cheeseman’s Green Lane, Kingsnorth’ comprising: ‘1,100 houses and 70,000 square metres of business floorspace together with mixed use community facilities, access roads, footpaths, cycle routes, landscaping & public open space’. The site was originally allocated in the Local Plan (2000) to provide 70,000 square metres of business floorspace.

- 3.107 The construction of the above housing units is on-going by phased development. This means that there may be approximately 135 hectares of vacant land remaining after the completion of the housing development.
- 3.108 It is understood that the council's policy for the site is currently being reviewed. The Council's emerging policy position is that there is little or no prospect of all of the 70,000 square metres of employment floorspace being developed at the site. This employment space was expected to be delivered at the 'nib' of the site which is adjacent to the central square of the site. It is now anticipated that an additional 300 dwellings may be permitted at this location through a future site allocation; a total of 1,400 dwellings may be built at the site including the current permission. The council's view is that a quantity of employment floorspace is necessary at the development.
- 3.109 We support the council's position i.e. there is little or no prospect of all of the 70,000 square metres of B1 employment floorspace being developed at the site; and likewise we suggest that some potential employment floorspace should be retained at the nib. This will not constitute primary employment floorspace in the Borough.
- 3.110 It is recognised that Cheeseman's Green/Finberry will predominantly be a residential development. This means that B2 General Industrial and B8 Storage or Distribution uses will likely be incompatible in a residential area as they would negatively impact residential amenity; indeed these more intensive uses can be accommodated at nearby Sevington and Waterbrook. Therefore, it is suggested that the designated employment floorspace at Cheeseman's Green/Finberry should be restricted to B1 employment uses. A level of B1a office development would be appropriate, but the scale of B1a office floorspace development should be controlled so as not to compete directly with the Commercial Quarter in the Town Centre.
- 3.111 The site is situated approximately 2 miles southwest of M20 Junction 10, it is therefore reasonably accessible and the proposed Junction 10A (to be constructed in 2019) will enhance its attractiveness to office use occupiers.
- 3.112 Given the scale of planned housing development at the location (a total of approximately 1,100 to 1,400 dwellings), we consider that it would be appropriate to retain 7,000-10,000 square metres of employment space at the site. We envisage that this would be equivalent to an indicative 0.7-1.0 hectares of employment land.
- 3.113 **Recommendation: This site presents some potential for smaller scale employment uses in a planned residential location. It is recommended that the site is promoted to support 7,000 – 10,000 sq.m of B1 floorspace.**

Ashford Business Park



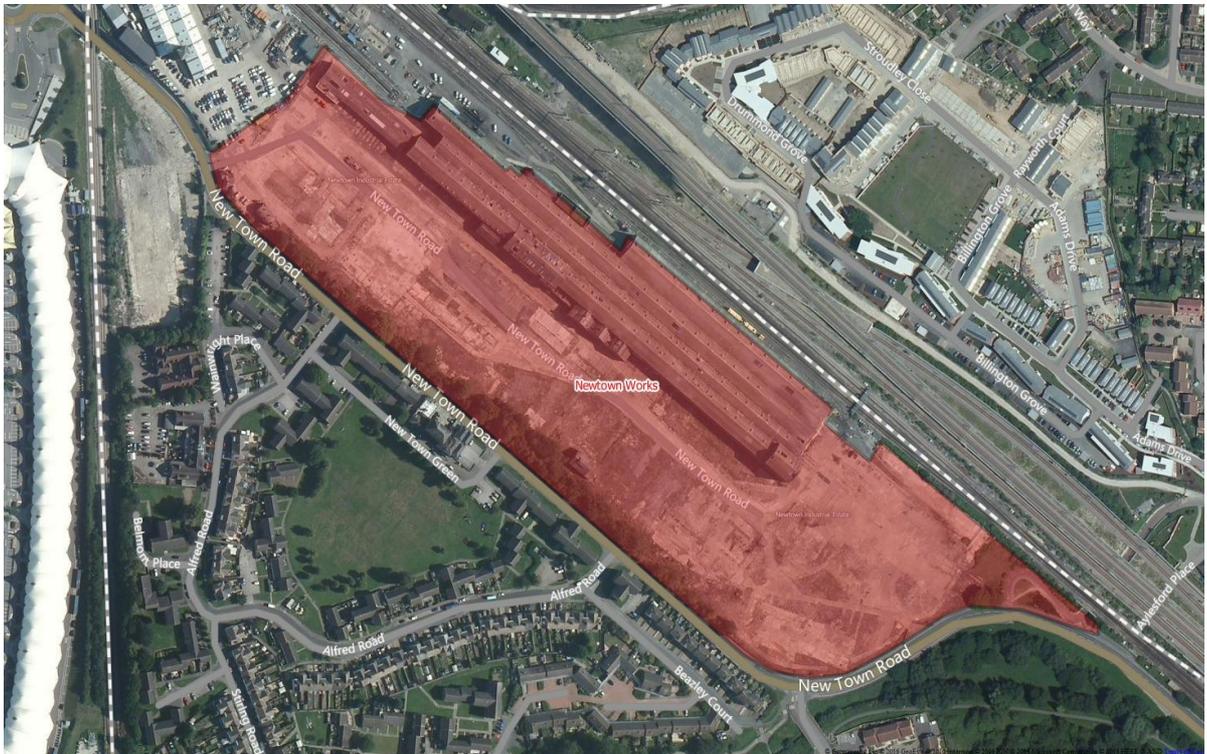
Site Area (ha)	Vacant Area (ha)	Nature of Vacant Land
8.68	0.00	Brownfield site

- 3.114 The Ashford Business Park is an industrial park situated in the south east of Ashford. It covers an area of approximately 8.68 hectares, located within one mile of M20 Junction 10. It has a single access road from the A2070. It is positioned adjacent to Ashford Retail Park.
- 3.115 Ashford Business Park contains a range of B class industrial and warehousing uses including some medium and large sized units.
- 3.116 Key occupiers include: CooperVision (a manufacturer of soft contact lenses and related products and services), Brian Yeardley (truck depot and warehouse facility), CCL Label (supplier of decorative, informational and promotional labels) and Dental Sky Wholesaler Ltd (dental equipment supply).
- 3.117 It appears that most of the buildings were constructed in the 1990s and 2000s. The buildings and the surrounding environment are generally in a good condition.
- 3.118 The business park has a strong level of occupation. The recently constructed Connect10 development of 24 light industrial hybrid units is broadly well occupied. There were four vacant units at the time of the site assessment (approximately 201.25 square metres each- circa total of 805

square metres; a vacancy rate of 16.7%- assuming a total floor space of 4,830 square metres). St Johns Court is fully occupied. It appears that CooperVision and CCL Label have both expanded into neighbouring units.

- 3.119 The internal access road, Foster Road, is adequate with regard to circulation and there is sufficient parking provision for the occupiers of the business park. However, the external access road, Barrey Road is shared with the retail park - this seemingly results in congestion during peak times. The business park has poor access to public transport as the nearest bus routes are on the A2070.
- 3.120 There is no evident potential for further development of the business park. The site is bounded by railway lines to the south west and the A2070 in the south east; and the Church Road residential area to the north and east.
- 3.121 **Recommendation: This is a high quality employment site which benefits from a good built-environment and close access to the strategic road network. This is reflected in the calibre of the business park’s key occupiers. We recommend the site is protected through policy for B1, B2 and B8 uses.**

Newtown Works



Site Area (ha)	Vacant Area (ha)	Nature of Vacant Land
8.38	0.2	Brownfield site

- 3.122 The Newtown Works site forms part of The Old Railway Works in Ashford. It is a brownfield site located off Newtown Road, to the west of the railway lines and south west of railway station, which is a ten minute walk away. The residential areas of Newtown and Willesborough are nearby. The site was identified for development in the Core Strategy. It comprised six listed buildings, which are the remnants of the former railway works. Some railway line remains along with large areas of concrete hard standing.
- 3.123 The south eastern part of site is currently being developed with on-going construction of residential dwellings. However, the scale of residential development is expected to be well below the original outline planning permission granted in June 2009 (a mixed use development comprising of 928 dwellings and 6,866 sq m of commercial/retail floorspace, restoration of the listed buildings and 957 car parking spaces). This is acknowledged in the Urban Sites and Infrastructure DPD Regulation 27- 'Policy U2 - Newtown Works'- which states an indicative site capacity of 700 residential units (225 up to 2016) and up to 7,000 square metres of A1- A5, B1, D1 and D2 (limited to gymnasium) uses. This explains that development of the site requires: two new access points, the construction of a new link road, substantial public realm inputs and site decontamination works. It is explained that development of the site would substantially increase the volume of traffic in the locality.
- 3.124 The listed buildings would require substantial work in order to adapt them for employment use, due to the existing structural design of the buildings.
- 3.125 It is considered that the necessity to undertake the aforementioned programme of works means that the financial viability of development for employment use is likely to be very limited. We conclude that this site offers potential to accommodate limited employment floorspace as part of mixed-use redevelopment. The amount of viable employment floorspace will be dependent on the number of residential units constructed; however it need not be greater than 2,000 square metres. Indicatively this might be equivalent to 0.2 ha of employment provision.
- 3.126 **Recommendation: Potential for limited provision of B Class employment floorspace as part of mixed-use development of listed buildings, subject to viability.**

Henwood Industrial Estate



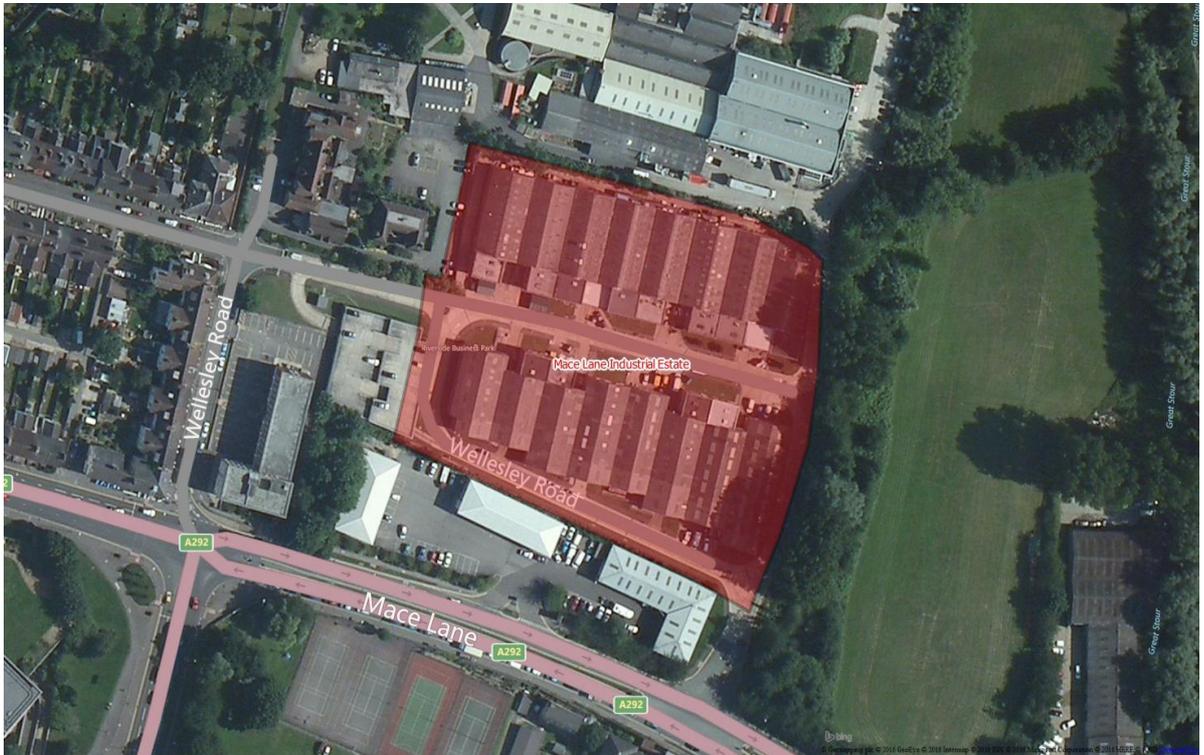
Site Area (ha)	Vacant Area (ha)	Nature of Vacant Land
18.00	1.00	Brownfield site

- 3.127 The Henwood Industrial Estate is located north east of the Town Centre. It is accessed from a roundabout on the A292 across Mace Lane and Hythe Road. It is situated approximately 2 miles from M20 Junction 9. The site covers circa 18.00 hectares and is bound by the Great Stour to the north west, the M20 to the north east and a residential area to the south. The estate contains a mix of B1, B2 and B8 and sui generis uses.
- 3.128 The external access is along Henwood from the A292 roundabout. This section of the A292 suffers from congestion at peak times. The internal circulation of traffic is acceptable, although the narrow road traversing the estate was being used for on-street parking which could potentially restrict the free movement of heavy goods vehicles (HGVs).
- 3.129 The estate's built-environment is older than Ashford's other industrial estates. Approximately 25% of the buildings were constructed pre-1970s. The majority of the estate dates from the 1970s and 1980s. Most of the buildings are in reasonable condition with regard to their age. The surrounding environment is generally reasonable.
- 3.130 Key occupiers include: Kent Fire and Rescue Service, MAF International (Mission Aviation Fellowship - an international Christian charity organisation), Plumbing Trade Supplies (PTS), Easy

Lift Freight Solutions (transport and logistics), Stewart Fraser (doors and metal pressings) and Roma Interiors (kitchens).

- 3.131 There was evidence of vacant units on the estate. For example, on the Vanguard Industrial Estate, Units 2 and 3 were vacant (approximately 675 square metres each). The estate generally seemed underused. In the Henwood Business Centre which contains 17 light industrial units dating from the 1980s, three units (approximately 213 square metres each) were vacant. The site assessments suggest a lack of demand for smaller units of 1,000 – 2,000 square metres at this location.
- 3.132 Equally, some larger premises were also vacant, for example a 27,245 square feet industrial/warehouse unit on the site was vacant. There were also other industrial/warehouse units available between 5,000 and 30,000 square feet. The vacancy level was approximately 20% across the estate.
- 3.133 There appears to be some opportunity for further development of the industrial estate. A 2.3 acre site was marketed for sale (on a freehold basis by Strutt & Parker) at Javelin Way. This site is adjacent to (and to the north of) the Kent County Council Highways Depot. There are no immediate constraints preventing the development of the site. It would be suitable for a range of employment uses (B1, B2 and B8). The location should prove to be reasonably attractive to occupiers, as the estate is of reasonable quality and is less expensive than more prestigious locations.
- 3.134 **Recommendation: The current industrial uses of the Henwood Industrial Estate should be supported. The estate has the potential to be used more intensively given the current level of vacant units; further policies should encourage its incremental renewal. B1, B2 and B8 uses are appropriate.**

Mace Lane Industrial Estate



Site Area (ha)	Vacant Area (ha)	Nature of Vacant Land
1.47	0.00	Brownfield site

- 3.135 The Mace Lane Industrial Estate is a small industrial estate covering an area of approximately 1.47 hectares, located to the north of the Ashford Town Centre. It is situated about 2 miles from M20 Junction 9 and is to the north west of the nearby Henwood Industrial Estate. It is accessed directly from Mace Lane on the A292.
- 3.136 The estate is bounded by the Great Stour to the east, the A292 to the south, and residential areas to the west and north. It has excellent access to services as the town centre is a 6 minute walk away with public transport connections available from thereon. There is also a bus service along Mace Lane.
- 3.137 The external access to the estate from the A292 is adequate. The internal estate road allows sufficient traffic circulation, however there was some on-street parking (despite the presence of a multi-storey car park) which may slightly inhibit the movements of heavy goods vehicles (HGVs).
- 3.138 The majority of the estate's building stock dates from the 1970s-1980s. Most of the buildings are in reasonable condition which reflects the fact that the estate is managed.

- 3.139 The key occupiers include: CooperVision (a manufacturer of soft contact lenses and related products and services), Sauflon (now a part of CooperVision) and Headley Brothers (a magazine printer).
- 3.140 The estate is nearly fully occupied, with the exception of one 6,285 square feet warehouse which was available to let.
- 3.141 There are no development opportunities apparent on the estate, as it is situated in close proximity to residential areas.
- 3.142 **Recommendation: This is an older employment site located close to the Town Centre. The employment stock is becoming relatively dated, but the site is currently well-occupied and actively used. A flexible policy might be appropriate recognising the potential for circumstances to change over time; this should be dependent on space becoming available elsewhere, indeed availability elsewhere is likely to be restricted until the delivery of M20 Junction 10A.**

Eureka Park



Site Area (ha)	Vacant Area (ha)	Nature of Vacant Land
42.20	20.7	Brownfield site

- 3.143 Eureka Park is Ashford's major existing B1 business park. It is a key strategic development site in Ashford. The park covers approximately 44.2 hectares in total. It is the main 'out-of-centre' B1a office location in the Town.
- 3.144 The site has first-rate strategic road access and is situated within 0.5 miles of M20 Junction 9. It is accessed via A251 Trinity Road. It is on the edge of the urban area.
- 3.145 There is open countryside to west with parkland at the end of Nicholson Road; it is bounded by the M20 to the south and residential areas in the north east and east.
- 3.146 There is some public transport access, mainly a local bus service to the nearby residential areas and from the adjacent Eureka Leisure Park to Ashford Town Centre and the railway station. There are some local services close to the business park e.g. retail shops and food outlets at Eureka Place.
- 3.147 The key occupiers include: Verifone (electronic point-of-sale solutions), Kent County Council, COTY (cosmetics e.g. Rimmel), Kent Community Health NHS Foundation Trust, Rift Group (accountancy), Advanced Computer Software Group (provider of software and IT services), Smiths Medical (manufacturer of speciality medical devices) and Brakes (Head and registered office- food service for hotels and restaurants). The dominant use appears to be offices utilised by the service sector.
- 3.148 The general access to premises is very good, however in some locations there is significant overspill on-street parking which inhibits direct access to premises. The lack of car parking was particularly acute in the Upper Pemberton area around the Rift Group and Kent NHS premises.
- 3.149 Eureka Park has a very good quality built-environment, the majority of the premises have been constructed post 2000; with the exception of areas such as Eurogate Business Park which forms somewhat older c. 1980s stock, and is generally considered to be a separate entity to Eureka Park. The quality of buildings and environment are both generally high.
- 3.150 Build-out of the site has been influenced by limited market demand for larger floorspace new-build office space in Ashford, particularly out-of-town.
- 3.151 There are further development opportunities on the business park. There is significant land on Nicholas Road that could possibly be released for development subject to addressing topographical constraints including slight sloping land and drainage of pooling water. There remains approximately 20.7 hectares of developable land at Eureka Park. It is feasible that the delivery of this site may extend beyond the plan period to 2030.

- 3.152 With regard to existing premises, a 10,500 square feet warehouse unit is currently being marketed by Quadrant Estates. In addition, No 1 Ashford site next to Eurogate is a development site presently being marketed by several commercial agents including Cushman and Wakefield who are advertising fit as providing potential for Grade A office space of 1,858 to 2,787 square metres / 20,000 to 30,000 square feet.
- 3.153 **Recommendation: Eureka Park is the main out-of-town office location in Ashford and is suitable particularly for B1 Business floorspace. It currently lacks a critical mass of occupiers and associated market profile, but is a strategically important employment location for the town. The Council should support managed further growth of the Park for B1 floorspace and potentially other complimentary employment uses. Adequate parking provision will be important in attracting occupiers.**

Givaudan, Kennington



Site Area (ha)	Vacant Area (ha)	Nature of Vacant Land
15.76	0.00	Brownfield site

- 3.154 The Givaudan and Premier Foods site at Kennington is situated on the A2070 approximately 2.5 miles east of Ashford Town Centre and 1.5 miles north of M20 Junction 10. The site has direct access from the A2070. The Conningbrook Lakes Country Park lies to the east of the site. The site is bounded by the Great Stour along the western half of the site; hence the site is subject to flood risk and further bounded by a railway to the north of the site. The site covers circa 15.5 hectares.

- 3.155 This is a large site containing two key occupiers: Givaudan (manufacture and sales of fragrances) and Premier Foods (manufacturing Angel Delight, Batchelors, Birds, Bisto, McDougalls and Paxo).
- 3.156 Givaudan occupy a modern headquarters office type of building at the southern section of the site. Premier Foods occupy the older industrial premises on the northern part of the site. The quality of the built-environment is good and the buildings are well maintained.
- 3.157 There is very good internal access to the site and on-site car parking provision is sufficient. . Public transport provision is relatively limited at the site, despite being served a local bus service to the centre of Ashford. There is efficient heavy goods vehicle (HGV) access with internal loading bays. Public transport provision is relatively limited at the site, despite being served by a local bus service to the centre of Ashford.
- 3.158 The site is fully built out and occupied. There is no apparent potential for additional development of the site, with the potential for expansion limited by the nearby railway line and the Great Stour.
- 3.159 **Recommendation: This is a successful employment site which should be protected by policy for employment use (B1, B2 and B8). It is occupied by two major companies who intensively and effectively utilise the site.**

Willesborough Industrial Park



Site Area (ha)	Vacant Area (ha)	Nature of Vacant Land
1.53	0.00	Brownfield site

- 3.160 Willesborough Industrial Park is a small industrial park located in a residential area approximately 2.5 miles to the south east of Ashford Town Centre and 1 mile away from M20 Junction 10. The industrial park is accessed from A2070 Kennington Road. The site is bounded by residential dwellings. It covers approximately 1.53 hectares.
- 3.161 It contains a mixture of older and newer buildings dating from the 1990s. The built-environment generally varies between very good (70%) and reasonable (30%) depending on the age of the buildings. The internal road access is adequate for current users with sufficient car parking provision.
- 3.162 The key occupiers include: Cannon Hygiene (washroom and hygiene care), Kineteco (manufacturer of hand wound and mechanical starter motors), ZLT Electrical Limited (wholesale electrical trade counter) and Outlook Fostering (fostering and caring services).
- 3.163 The estate is close to full occupation with no evidence of significant vacant premises; it does not have any further development potential.
- 3.164 **Recommendation: This is a small industrial park which plays a role in providing local employment. It is generally well occupied and actively used. Policy should support continued B1 use.**

Rural Sites

- 3.165 The assessment of selected rural sites has been undertaken to provide general indicative advice. It does not represent an analysis of all rural employment sites. Therefore, this section reviews a sample of five rural employment sites.

Evegate Business Village, Smeeth

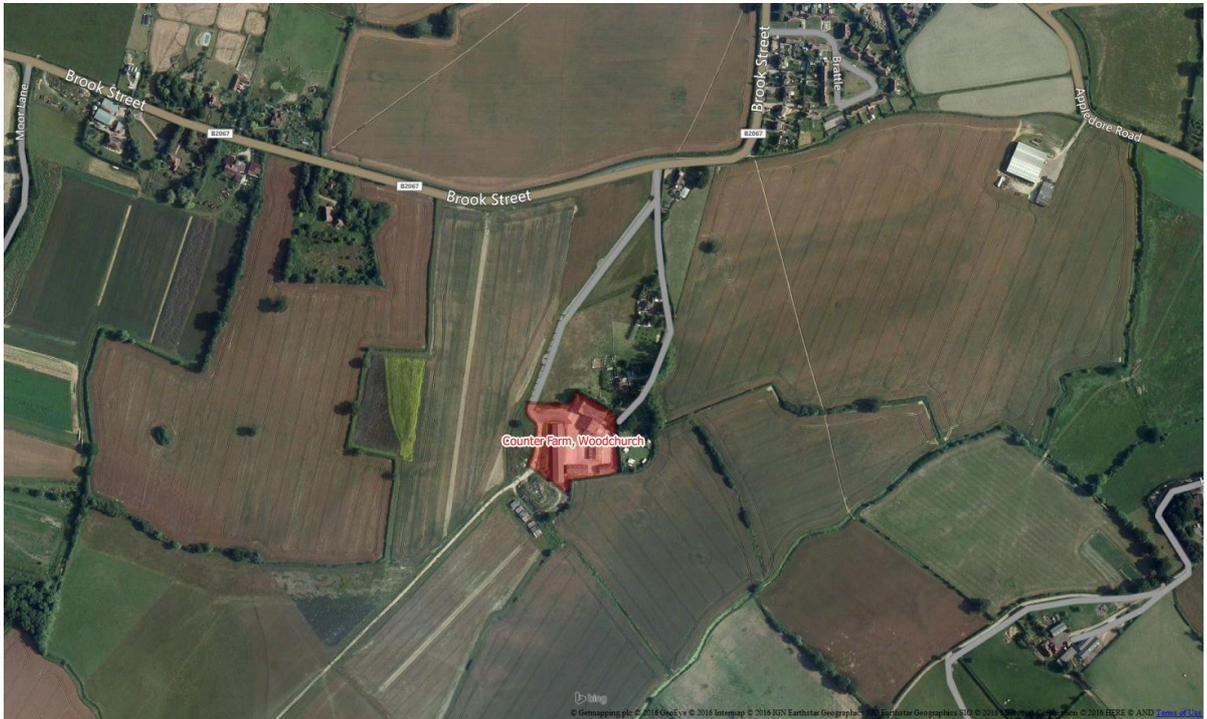


Site Area (ha)	Vacant Area (ha)	Nature of Vacant Land
1.31	0.32	Open Space/fields

- 3.166 The Evegate Business Village is a small rural collection of business, craft and office units situated to the south west of the village of Smeeth. It is located on Station Road, a classified unnumbered road, which leads off the A20 Hythe Road. It is situated approximately 5 miles away from Ashford Town Centre and 2.5 miles south east of M20 Junction 10. The site covers approximately 1.31 hectares.
- 3.167 The site comprises a mixture of traditional barns, oast houses and buildings. Most of the buildings have been constructed post 1990, although the original oast chimneys are much older. The built-environment is very good and the buildings are well maintained.
- 3.168 The internal access and flow of vehicles was reasonably good and there is adequate on-site parking provision. The external access junction is slightly impaired by poor visibility on exit due to a bend on Station Road near the junction with Bower Road. The site has very limited access to public transport.

- 3.169 There was a strong level of occupation throughout the business village. At the time of writing, only one first floor office unit (390 square feet, 36 square metres) was being marketed for rent. Otherwise, the business village was fully occupied.
- 3.170 Key occupiers include: Aegis Assure (insurance services), 1st Choice Jobs (recruitment agency), Ottewill Silversmiths (jeweller and silversmith), Ibbidi-bobbidi-boo Boutique (gift shop and ladies clothing boutique), CVS Health (Cardiac Testing & Diagnostics), Harrison's Hair Team (Hairdressing), Montgomery Veterinary Clinic, Barbara-Ann Clark Fine Foods & Delicatessen (Restaurant/Coffee Shop/Deli) and RDA Architects. In sum, most occupiers undertake retail activities, although a reasonable proportion undertake service sector operations.
- 3.171 At the time of inspection, a new unit was being constructed onsite. It is our understanding that this relates to the implementation of planning application 14/00610/AS which granted permission for the construction of two office buildings. There is some potential for expanding the site; there is an area of hardstanding adjacent to the car park which could be developed (approximately 0.32 hectares); further there were no visible constraints for expanding the site onto fields at the edges of the site.
- 3.172 It is considered the type of smaller scale units employment offered by the business village would be attractive in the current market. These are particularly craft retail/ workshops.
- 3.173 **Recommendation: The Evegate Business Village is an important rural employment site in the Ashford area. It offers an attractive environment for smaller scale craft business/ workshop activities and is consequently well-occupied. It is suggested that policies should support the continued employment use of the village and sympathetically consider proposals for further development.**

Counter Farm, Woodchurch



Site Area (ha)	Vacant Area (ha)	Nature of Vacant Land
0.87	0.00	Open space/fields

- 3.174 The site at Counter Farm, Woodchurch is a small local employment site which is part of a relatively isolated farm estate. It is generally encompassed by open countryside. The main residential area of Woodchurch Village is located about 0.5 miles away which offers local services. It is located approximately 9 miles south west of Ashford Town Centre. The site is accessed from the B2067 Brook Street via a single track unclassified road. The site covers approximately 0.87 hectares.
- 3.175 The general built-environment is reasonable and the buildings are of an adequate standard. They appear to have been mainly constructed during the 1970 and 1980s (60%), alongside some newer units post 1990 (40%).
- 3.176 The current occupiers undertake a mixture of B1 and light industrial activities. The key occupiers include: Nison Garden Ltd (supplier of greenhouses), RW Tyres, X-treme Jaguar (car restoration), W.H. Colt & Son Co Ltd (builder of timber framed houses), South East Timber & Damp Limited (remedial damp treatments) and QuBox (retail home and garden products). It was fully occupied at the time of inspection, although there appeared to be low levels of activity.
- 3.177 There is sufficient parking provision on-site; there appear to be no heavy goods vehicle (HGV) associated activities. There is limited public transport provision in the area, although there is a bus stop near the access road to Counter Farm.

3.178 There are no evident development opportunities at the site. Any future development proposals would need to address landscape impacts.

3.179 **Recommendation: This is a small rural employment site which is adequate for the range of present uses. It supports a number of local business activities. There is no evident opportunity for any further development at the site.**

Leigh Green Industrial Estate, Tenterden



Site Area (ha)	Vacant Area (ha)	Nature of Vacant Land
2.40	0.00	Open space

3.180 The Leigh Green Industrial Estate in Tenterden is a small actively used local industrial estate. It is located on the B2080, 1.5 miles south east of Tenterden, 13 miles south west of Ashford Town Centre and 13 miles south west of M20 Junction 10. The estate is directly accessed from the B2080. It is situated approximately 1.5 miles from the A28. The site covers approximately 2.40 hectares.

3.181 The site is generally used for B1, B2 and B8 uses. It is generally well occupied containing small scale manufacturing and trade counter uses. There is some land that is used for kerosene storage.

3.182 Key occupiers include: Cerium (manufacturer of optical products), Johnston Building Supplies Ltd - Bathrooms & Showers, Tenterden Tiles, EO Culverwells Ltd (farm machinery dealership), Rother Valley Press (printing services), Linden Automotive (garage), Ben's Tyres, Wealden Antique

Warehouse (supplier of antiques), Coolex Building Services (mechanical and electrical services), Challenge Control (audio visual installations) and Animal Feed Supplies.

- 3.183 The built-environment and the quality of building stock varies between very good and reasonable. The age of building stock is mainly 1970-1980s alongside some newer units.
- 3.184 There was evidence of some parking on internal roads which was restricting the circulation of traffic. There is very limited public transport access from the site.
- 3.185 At the time of inspection, the industrial estate was fully occupied. There is no potential for development of the estate. The estate is situated within the High Weald Area of Outstanding Natural Beauty.
- 3.186 **Recommendation: This is an actively used industrial estate; it is perhaps the principal industrial space in the Tenterden area. Therefore, it is recommended that the site is supported for continued employment use (B1, B2, B8).**

Bethersden Business Centre



Site Area (ha)	Vacant Area (ha)	Nature of Vacant Land
1.29	0.00	Open space

- 3.187 The Bethersden Business Centre is a small rural industrial estate to the south west of Bethersden Village. It is accessed from an unclassified single track road off the A28 Ashford Road which is

about 0.5 miles away. It is situated approximately 7.5 miles south west of Ashford Town Centre and 10 miles south west of M20 Junction 10. The site covers approximately 1.29 hectares.

- 3.188 The majority of buildings at the business centre date from the 1970 and 1980s. They are generally in reasonable condition; they are notably low height shed or warehouse type structures. There are also some newer post 2000 constructed buildings at Unit 5. The general environment is average.
- 3.189 There is adequate internal access with sufficient car parking spaces for businesses and employees. The business centre has poor public transport accessibility, and the nearest local services are almost 2.0 miles away in Bethersden Village.
- 3.190 Key Occupiers include: Traditional Building and Joinery, Chequertree Fishery (fishing facilities), R & R Environmental Services (septic tank & cesspool emptying), Fulford Sound and Communication Services Limited (installation of audio visual services). At Unit 5 which comprises a total of 7 units (76.55 square metres each; total- 535.85 square metres), only 2 units appeared to be occupied and in use. This represents an occupancy level of 28.6% at Unit 5. Although occupation levels are higher at the rest of the business centre, there is a general low level of activity around the site.
- 3.191 There may be some development potential at the site on the fields around the perimeter of the site, away from a small group of residential dwellings. However, the site is situated within a special landscape area which diminishes its development potential. The site is currently underused and could be intensified.
- 3.192 **Recommendation: This is a rural employment site with currently limited levels of activity. However, it offers useful space for small scale rural business operations. It is recommended that its employment use is protected for B1, B2, B8 and employment-generating sui generis uses.**

Pivington Mill, Pluckley



Site Area (ha)	Vacant Area (ha)	Nature of Vacant Land
2.43	0.00	Open space/fields

- 3.193 Pivington Mill, Pluckley is a large successful rural employment site. It is situated 8.0 miles to the north west of Ashford Town Centre and approximately 7.5 miles north west of M20 Junction 9. The site lies to the north of Pluckley and is accessed via Egerton Road. The site covers approximately 2.43 hectares.
- 3.194 The external access to the site is significantly restricted as it is accessed via a series of narrow rural roads from the A20 Maidstone Road. The access road to the mill is single track which restricts circulation when heavy goods vehicles (HGVs) are passing at peak periods. The internal circulation is also limited due to narrow internal roadways and parking along these. This is due to onsite parking provision being somewhat limited. The undulating topography of the site further inhibits its accessibility.
- 3.195 The site has no access to local services, except those which are located in the nearby villages of Egerton and Pluckley which are both situated about a mile away from the site. There is some public transport provision available at Pluckley train station which is 2.5 miles away from the site. The bus service on Egerton Road is very limited.
- 3.196 The quality of the built-environment is generally reasonable. Some of the older buildings which are pre-1970s have been renovated and are in good condition, others are in a poorer condition. The

buildings on the site are typically older than those found in other industrial areas reflecting the mill's use during the Second World War. Some buildings have been converted since that time and others have been purpose built.

- 3.197 The site is utilised for a range of B class activities including B1, B2 and B8. Key occupiers include: Park Leisure (manufacturers of steel playground equipment), Tegra Ltd (blast cleaning service), Kent and Sussex Tea and Coffee Company (production and sale of teas and coffees), Scaldershurst Ltd (paper merchant- warehousing and distribution), A.J & N.M Carr (coach and minibus hire and repair), Glass 'N' Glaze (design and installation of glass), Camelot Finishers (shot blasting and powder coating).
- 3.198 There are no evident vacancies at Pivington Mill. Some units appeared to be underused, for example, those areas which are used for open storage. There seem to be no development opportunities at the mill, unless surrounding farmland is incorporated into the mill's site area.
- 3.199 **Recommendation: Pivington Mill is a successful rural employment site. This is demonstrated by its strong level of occupation despite significant accessibility constraints. It is a well-functioning site which is satisfying demand for space (B1, B2 and B8) and business activity in this rural location.**

Summary

- 3.200 It was found that there was generally a strong level of occupation and activity across the sample of rural sites reviewed. There appears to be solid demand for high quality smaller-scale units which have a combined retail function. This is exemplified by the success of Evegate Business Village. In contrast, a typically agricultural location, for example, Counter Farm- Woodchurch had a much lower level of activity despite being well-occupied. However, more traditional rural industrial space remains an important host to rural economic activities which require low cost space.
- 3.201 It is suggested the local plan should protect these rural employment locations and adopt flexible policies through development management on a site specific basis in order to promote further growth. Rural business activities are characteristically diverse and therefore an adequate mix of rural employment space is required to accommodate a range of B class uses.

4 SUPPLY-DEMAND BALANCE AND CONCLUSIONS

4.1 In this section we bring together the analysis of employment land supply considered in this report, with the findings of the SEOR Report on the need for employment land to comment on the supply/demand balance for employment space, in quantitative and qualitative terms. This is used to draw conclusions on the need for and supply of employment land in the Borough.

Quantitative Balance

4.2 The commercial analysis undertaken indicates that there is a reasonable level of readily-available supply of both office and industrial space available at the time of the assessment in 2015. There is 3.9 years supply of office space and 5.2 years of industrial space. The supply of smaller industrial premises (< 185 sq.m) and larger offices (> 1850 sq.m) is most limited. The demand evidence (based on past take-up data) pointed to stronger demand for industrial/ distribution floorspace; with office take up being relatively modest – however Ashford is strategically located within the sub-region and with strong accessibility, including to London as well as internationally, which supports its potential to expand its base of office occupiers.

4.3 Our understanding is that the Council intends to plan for economic growth on the basis of the Baseline Scenario within the SEOR Report. This generated the following ‘need’ for employment land (in net terms):

Table 5: Net Need for Employment Land – SEOR Baseline Scenario

	Total 2015-30 (Hectares)
Office (B1a/b)	11.4
Industrial (B1c/B2)	11.1
Warehouse/ Distribution (B8)	21.7
Total	44.2

4.4 We have considered the demand scenarios for 2015 forwards, as the supply position in this report is accurate as at 2015. The evidence suggests a broad balance between the need and supply of employment land over the 2010-15 period. The baseline scenario in the SEOR Report identified a gross requirement for between 13 – 16 ha of land, with the higher figure including a margin to take account of the qualitative requirements of different occupiers and to recognise the inexact nature of the forecasting exercise. Gross floorspace completions in the 2010-15 period totalled 62,000 sq.m. Applying consistent plot ratio assumptions to this equates to take-up of 15.5 ha of employment land indicating a balance between assessed need and levels of development over the 2010-15 period in the Borough. In view of this GL Hearn considers that it is simpler and more straight forward to consider supply/demand balance in this report using a 2015 baseline and looking forwards.

- 4.5 With the addition of a margin (25%) to the figures set out in Table 5, a need for 55 hectares of employment land is generated. This is shown below. Of this, the requirement for land for B1 offices comprises 14.3 ha, with a 13.9 ha requirement for industrial space and 27.1 ha requirement for warehouse/ distribution space.

Table 6: Need for Employment Land – Baseline Scenario with 25% Margin

Total 2015-30	
Office (B1a/b)	14.3
Industrial (B1c/B2)	13.9
Warehouse/ Distribution (B8)	27.1
Total	55.3

- 4.6 In drawing conclusions on future demand, it is appropriate also to consider past development trends. GL Hearn has access to completions data between 2002-15, based on information collated by Ashford Borough Council and Kent County Council.
- 4.7 We have taken past floorspace completions (gross) by use class over the period since 2002/3 and calculated the expected land area associated with this using consistent plot ratio assumptions to those in the SEOR Report (looking forwards) to estimate the likely future land area. This is then projected forward over the 2015-30 period. This completions scenario results in a gross employment land need for 53.1 ha of land. This is very similar to the results from the Baseline Scenario, reinforcing the realism of this.

Table 7: Projected Need for Employment Land – Past Completions Scenario

	Average Gross Completions Per Annum, 2002/3 - 2014/15	Estimated Land Area per Annum (Ha)	Projected Gross Completions 2015-30
A2/B1 Total	6986	1.3	19.6
B2	3614	0.9	13.6
B8	5324	1.3	20.0
Total B-Class & A2	15924	3.5	53.1

- 4.8 The completions scenario does however indicate a higher demand for office floorspace (almost 20 ha relative to 14 ha in the baseline scenario). It shows in contrast a lower need for B8 warehouse/ distribution floorspace (20 ha compared to 27 ha in the baseline scenario). The forecasts for industrial floorspace are similar.
- 4.9 In drawing conclusions on future employment land needs, we consider that a cautious approach should be used, taking the higher of the two forecasts approaches for each use class, in order to ensure that employment land supply does not unduly constrain the potential of the Borough's economy and to recognise the inherent uncertainties associated with long-term forecasting. On this basis we conclude by identifying a quantitative need (2015-30) for B-class employment floorspace:

- Office (B1a/ b): 20 hectares
- Industrial (B1c/ B2): 14 hectares
- Warehouse/ Distribution (B8): 27 hectares.
- Total B-Class: 61 hectares

4.10 In considering how much land to allocate, the Council might also wish to consider the needs of non B-class uses such as waste, recycling and sui generis uses, which often take place on allocated employment land. In this respect, it might be sensible to provide an additional 10% flexibility, and thus identify a supply of around 66 ha of employment land.

4.11 We turn next to the quantity of land available on land identified for employment with development potential.

4.12 The table below outlines, based on the analysis undertaken in this report and the Council's monitoring data, the available and potential land which could accommodate employment development. It should be noted that this is based on the analysis undertaken, and should not be considered to provide a comprehensive review of all land with employment development potential particularly within the rural parts of the Borough.

Table 8: Available Land with Development Potential for Employment

Site	Location	Site Area (ha)	Approx. Vacant Area (ha) for B Class Employment *
Town Centre- Commercial Quarter	Urban	6.34	2.5
Victoria Road Sites	Urban	16.8	0.5 – 1.0
Cobbs Wood Industrial Estate	Urban	29.3	2.4
Kingsnorth Industrial Estate	Urban	13.07	1
Chilmington Green	Urban	299.82	1
Orbital Industrial Park	Urban	47.41	8.65
Waterbrook	Urban	N/A	15
Sevington	Urban	49.89	38.7
Cheeseman's Green/ Finberry	Urban	185.68	0.7-1.0
Newtown Works	Urban	8.38	0.2
Henwood Industrial Estate	Urban	18	1
Eureka Business Park	Urban	42.2	20.7
Evegate Business Centre, Smeeth	Rural	1.31	0.32
Total: Urban			92.4 – 93.2
Total: Rural			0.32
Total			92.7 – 93.5

- 4.13 In quantitative terms, those sites which might reasonably accommodate office floorspace development (B1a, B1b) provide a potential capacity for over 25 hectares.² This is above the assessed level of need and indicates that there is some potential to rationalise the level of supply, particularly out-of-town.
- 4.14 For industrial/ warehouse floorspace (B1c, B2, B8) there is a potential supply of land totalling 67 hectares³ in and around Ashford. This compares to an assessed need for up to 46 ha. There is thus some potential level of over-supply; however much of the available land supply is constrained by access (either in planning or market terms) in the short-term.⁴
- 4.15 If all sites are considered, a quantitative over-supply of potentially 26.7 - 27.5 hectares is shown. However in considering whether any sites should be allocated for alternative uses, or allocations revised, it is important that qualitative factors are taken into account.

Qualitative Balance

- 4.16 We have next sought to consider whether there is a sufficient supply of different types of employment land to meet demand from different occupiers/ use classes. It is important to ensure that businesses and occupiers have a sufficient choice of sites of where to locate their business.
- 4.17 In regard to the office sector, the main supply is expected to come forward within the Commercial Quarter within the Town Centre (equivalent of 2.5 ha for office floorspace); and Eureka Park, out-of-town (20.7 ha development potential). There is potential for modest employment floorspace to come forward as part of urban extensions at Chilmington Green and Cheesmans's Green/ Finbury, and potentially as part of development at Newton Works and potentially some provision along Victoria Road. Overall the evidence suggests that there is sufficient supply of land capable of supporting office development to meet the identified needs. It is important however that the supply of land with office development potential out-of-town is managed in order to support the development of the Commercial Quarter.
- 4.18 The impact of permitted development rights in Ashford may result in some loss of office floorspace, contributing to a level of churn within the local market and replacement demand. We note however that the Commercial Quarter is excluded from the permitted development legislation. Our conclusions on the quantitative need for office floorspace take this into account.

² Based on potential supply at the Commercial Quarter, Eureka Business Park, Chilmington Green, Cheesmans Green/ Finbury, and on the Victoria Road sites. It should be noted that other sites also provide potential to accommodate office development.

³ Note this includes the Victoria Way sites which are also included as offering office development potential

⁴ This comprises up to 62 hectares made up of 38.7 ha at Sevington; 15 ha at Waterbrook; and the remaining 8.65 ha at Orbital Business Park

- 4.19 Taking account of the quantitative balance, there is some potential to consider rationalising the supply of land for office floorspace, particularly out-of-town.
- 4.20 There is inevitably a degree of overlap between land which is suitable for industrial and for warehouse/ distribution floorspace.
- 4.21 Larger B8 occupiers are likely to seek employment sites which in particular have good access to the strategic road network. There is some land available within Orbital Business Park; however in the short-term prior to the delivery of M20 Junction 10A the supply of land for this sector appears relatively tight. The scale and phasing of development to the south of the town, at Waterbrook, Sevington and Orbital Park, is necessarily dependent on improvements to transport infrastructure – particularly the delivery of M20 Junction 10A. Higher development costs associated with infrastructure provision in bringing forward these sites is also a consideration. This is likely to affect the potential to attract larger distribution occupiers in the short-term, albeit that for these their area of search is likely to be sub-regional in nature. In the medium term and beyond, land at Sevington and Waterbrook provide additional potential land to support warehouse/ distribution development.
- 4.22 For small and medium-sized industrial occupiers, the evidence would suggest that there is a reasonable level of land available to accommodate demand in both the short- and longer-term.
- 4.23 In regard to the quality of sites, the Borough's employment land portfolio provides a range of sites of varying quality, size and cost catering for the needs of a range of occupiers. We consider that there is sufficient land supply available to accommodate a range of business needs.
- 4.24 The site assessments indicate that the quality of existing employment sites is generally strong; sites are generally well occupied and actively used. The site assessments identified only one site, Mace Lane Industrial Estate, where the potential redevelopment of employment land in the medium/ longer-term might be considered through a plan-led approach or a flexible policy be applied. Our analysis supports protection of all other existing sites for employment use. Relative to other local authorities in which we have undertaken similar assessments, there also appears to be less pressure for redevelopment of employment land. This potentially reflects a more healthy supply of residential development land particularly in/around Ashford.
- 4.25 Given the potential over-supply, there is potential to consider the reallocation of some sites which are currently allocated for employment development; and the redevelopment of the Mace Lane Industrial Estate for alternative uses. It should however be borne in mind that there is some potential for larger potential employment sites, such as Eureka, Sevington and Waterbrook, to support employment development beyond the plan period.

- 4.26 The Borough has a healthy rural economy. The analysis has revealed that rural employment sites are generally successful with high levels of occupation and activity. This supports the conclusion of the Ashford Rural Economic Assessment conducted by NLP, namely that “despite past trends of adequate supply provision, low levels of vacancy combined with low levels of emerging supply indicate that there is a decent level of demand for employment space in the rural” (Ashford Rural Economic Assessment, 2014: para. 7.8- 71) parts of Ashford. We also consider that it is probable that “Rural Ashford has insufficient employment floorspace in quantitative terms to meet future needs up to 2030 under all scenarios of future growth” (Ashford Rural Economic Assessment, 2014: para. 7.13- 72).
- 4.27 Taking account of the site assessment work undertaken, GL Hearn considers that in particular there is a limited supply of employment land in/ around Tenterden relative to the size of the settlement. The Council should consider adopting a flexible approach to the extension of existing employment sites in the rural areas and granting of planning permission for new employment development, subject to market demand and site-specific issues, in order to support the rural economy.