SITE PROFORMA UPDATES

Market Commentary (as of August 2024)

ON BEHALF OF: South Gloucestershire Council

DATE OF REPORT: February 2025



Review of the South Gloucestershire Employment Land Review (ELR) (2022)

Market Commentary updates to Individual Site Proformas

The following tables provide updated market commentary (as of August 2024) to be read alongside individual site proformas of the South Gloucestershire Employment Land Review (ELR) (Atkins for South Gloucestershire Council, January 2022).

The North Fringe Urban Area		
The North Fringe due to its unrivalled connectivity remains the most attractive commercial area in the region. The whole area is attractive to the commercial market in terms of both Offices and industrial. This area is poplar and will accommodate local, regional, national and international business in all sectors, especially defence, distribution, and professional services.		
Site ID	**Site Name**	**2024 Market Commentary**
SG-01	Abbey Wood Business Park	Abbey Wood offers good quality modern space to the market and remains an important employment site to retain.
SG-02a	Almondsbury Business Park (Western Site)	The area and park remain popular albeit demand has reduced since Covid-19. The area should be retained for commercial uses. This area of Almondsbury is mainly industrial and demand is high. A longer term larger scale redevelopment should be considered to help recycle any obsolete stock. The Almondsbury area needs to be looked at as a whole as the area remains popular for commercial uses but some of the current stock is not suitable for modern occupiers.
SG-02b	Almondsbury Business Park (Central Site)	The area and park remain popular albeit demand has reduced since Covid-19. The area should be retained for commercial uses. This area of Almondsbury is mainly made of office accommodation the office stock is poorer older quality and doesn't suit modern occupier's demand. However, the area has been reasonably successful with smaller occupiers. As with the western site, a longer-term larger scale redevelopment should be considered to help recycle any obsolete stock.

SG-02c	Almondsbury Business Park (Eastern Site)	The area and park remain popular albeit demand has reduced since Covid-19. The area should be retained for commercial uses. This part of Almondsbury is mixed use. The industrial in the area has good demand and suits the market, the offices are poorer quality, and the hotel is well located. As with the western site, a longer term larger scale redevelopment should be considered to help recycle any obsolete stock.
SG-03	Aztec West Business Park	Aztec west remains the premier business park in the region alongside Bristol Business Park. However the site has a number of voids. It benefits from bus services but has no rail connection and more importantly limited amenities resulting in the park struggling to attract occupiers. Industrial demand remains positive but the office demand has weakened especially since Covid-19. Improvement of amenities on the park would help to reduce voids as it would offer modern occupiers the accommodation they require.
SG-04	Bristol Business Park	The development by Babcock has enhanced the offering on the estate and the amenities that are going into the ground floor of one the Babcock buildings is important for the site. The business park alongside Aztec West is the premier business location in the region. The new amenities, the transport links (nearer parkway and the bus routes) and new office offering means that it will attract office occupiers over Aztec West. The area is popular and should be retained as employment use.
SG-05	Employment Land at Filton Northfield	Highly visible location suitable for variety of commercial uses, to include office, industrial and retail/ leisure. Good demand from the market.
SG-06a	Land East of A38, Filton/Patchway (Northern Site)	Remains good demand for industrial. Planning has recently been approved for 4 trade counter units and a drive through. The area should be retained and protected.
SG-06b	Land East of A38, Filton/Patchway (Rolls Royce Main)	Medium and longer term development potential depending on occupiers plans. Should be retained for employment use. Would benefit from being brought forward with other sites in Filton area.
SG-06c	Land East of A38, Filton/Patchway (South of B4057)	Good commercial demand in location especially from the industrial sector. Majority of the area recently developed with modern buildings. Should be retained for employment use.

SG-06d	Land East of A38, Filton/Patchway (Southern Site)	Well located site which should be retained for employment use. Good commercial demand especially from Industrial sector.
SG-07	Land West of A38 and South of Hallen Railway line (incl. Airbus)	Well located and important employment site which is attractive to commercial occupiers. It would benefit from being developed in conjunction with other Filton sites and master planned accordingly. Some buildings will become obsolete over next few years and will require some form of redevelopment. The site offers some opportunities for intensification. Vacant fringe parts also offer potential for rationalisation of uses and longer-term regeneration.
SG-08	Ministry of Defence, Abbey Wood	Very bespoke building that suits the occupier, good location and should be retained but if the MOD were ever to relocate then the building will be difficult to use in current form. Although the site should remain an employment site due to good road and rail access.
SG-09	Old Gloucester Road, Hambrook	Well located and reasonable modern buildings that are attractive to the market - retain as employment
SG-10	Parkway Business Park	Well located for transport and amenities and the majority of the buildings are reasonably modern that are attractive to the market - retain as employment. Some buildings are underused with current take up of office floorspace challenging. The planned works to Parkway Station will improve the demand. The Lakeview building (formally Axa or Aviva) for example is no longer fully occupied by Aviva and is looking to be multi let. The building is very large for a single occupier in the location and therefore longer term if continuing as offices will need to be multi let and given the amount of accommodation in the area it will be competing with a lot of smaller space. However the facilities offered at Lakeview will prove to be attractive to the market - as can be seen by different occupiers taking smaller amounts of space. Parking areas that are surplus to requirements may offer redevelopment opportunities for alternative uses.
SG-11	Parkway North Business Park	Well located and reasonable modern buildings that are attractive to the market - retain as employment, some buildings are becoming obsolete and need to be redeveloped. The planned works to Parkway Station will improve the demand.
SG-47a	Cribbs Causeway (Lysander Road North)	Long term important employment site which has a mix of uses. Retain and safeguard.
SG-47b	Cribbs Causeway (The Laurels)	Long term important employment site which has a mix of uses. Retain and safeguard.

SG-47c	Cribbs Causeway (Lysander Road South)	Long term important employment site which has a mix of uses. Retain and safeguard.
SG-48	Jupiter Road	Location is attractive to employment uses most notable industrial should be retained as an employment site.
SG-49	Patchway Industrial Estate	Well located and popular location, existing buildings are becoming obsolete which has resulted in the recent redevelopment Units 8 and 9 as part of the Patchway Nine Development which provides Modern industrial Units. Redevelopment is continuing with the proposed redevelopment of the Sainsbury's Distribution Centre (Unit 10) for two flexible industrial units of c.40,000 sq ft and also Unit 1 which has been demolished to provide 28,500 sq ft of new industrial space. Redevelopment for employment use should be encouraged. Retain as employment.
SG-50	Pearce/Auto Techniques Site	Well located site attractive to the market with good transport links being next to Parkway Station. The planned station works will further improve demand - retain as employment.
SG-51	University of the West of England	UWE remains an important occupier in the region. Sites around the campus offer good level of opportunity for intensification. Should retain employment in association with ongoing operational requirement of the University.
SG-52	Land West of A38 (inc. runway and Royal Mail site)	Well located site which should be retained for employment use. The amount of office space planned in the wider Filton schemes means that it will attract occupiers away for other business parks, such as Aztec West and Almondsbury which may mean they suffer as a result. Any development needs to be built around amenities and transport to attract the right occupier. Could attract occupiers from other locations, but unlikely to attract occupiers from City Centres. Industrial demand will remain high. Good opportunity to bring forward modern employment space to the market with the right amenities.

The East Fringe Urban Area		
The East Fringe is well located and easily accessible. The whole area is attractive to the commercial market especially industrial and could serve as a good location for companies looking to relocate or expand in the sub-region while retaining their existing workforce. This area could house local, regional and national business in sectors such as distribution and last mile logistics.		
Site ID	**Site Name**	**2024 Market Commentary**
SG-12a	Emersons Green (Science Park)	Strong demand within Science park. The links with the university and the other amenities offered on the park means it will remain popular. Science parks tend to grow more slowly due to the gateway policies and focus on R&D but the site remains an important employment site in the region
SG-12b	Emersons Green (Emerald Park and Harlequin Office Park)	Well located and reasonable modern buildings that are attract to the market - retain as employment. Emersons green offices sites will be seen by the market as offering secondary demand when compared to Aztec West, Bristol Business Park, Parkway, Filton and possible Almondsbury locations. Companies looking at growth in this location will either be servicing East Bristol locations/ clients.
SG-12c	Emersons Green (Vertex Park and Residual)	Well located and reasonable modern buildings that are attract to the market with some vacant land but demand in area from industrial/ logistics occupiers - retain as employment
SG-13	Chapel Lane, Warmley	Secondary location for employment- Retain
SG-14a	Tower Road, Warmley (Eastern Site)	Offers secondary accommodation to the market with recent redevelopment in the centre part, and remains popular with occupiers, has longer term development opportunities for more modern units.
SG-14b	Tower Road, Warmley (Western Site)	Offers secondary accommodation to the market but remains popular with occupiers, has longer term development opportunities for more modern units.
SG-15	Bristol Uniforms Site	Secondary location for employment. Longer term thoughts for alternative uses could be considered given the growth and opportunity in other locations. Difficult access for industrial. Local demand for serviced offices, workshop and retail uses.
SG-16	Oatley Trading Estate, Kingswood	Offers secondary accommodation to the market but remains popular with occupiers, has longer term development opportunities for mixed use or other uses such as community facilities.
SG-17	Civic Centre, Kingswood	Good quality accommodation albeit in fringe location will serve local demand. Limited demand if the council where to move as large office building for area. Would be suitable for subdivision to make the building multi let.

SG-18	Station Road, Kingswood	Well located site with good local demand - building are a mix of uses and serve the local market. Longer term development can be considered to provide more modern industrial units.
SG-19	North of Douglas Road	Will be attractive for local occupiers with demand particularly for industrial but also small-scale offices and leisure. Long term vacancies at the former Lucas works in need of regeneration with potential for longer term redevelopment for mixed use including employment.
SG-20	Eclipse Office Park	Well located and reasonable modern buildings that are attractive to the local market - retain as employment.
SG-21	McBraida Site	The site is attractive for the current use and occupier. The proposed plan to expand show the tenants confidence in the building. Retain.
SG-22	Longwell Green Industrial Estate	Well located and reasonable modern buildings that are attract to the market - retain for employment. The site has recently been granted planning permission to redevelop to provide new buildings to serve in classes E, B2, B8, C1 including drive through restaurants (sui generis)
SG-23a	Southway Drive (North), North Common	Some local occupier demand for industrial but demand will be limited.
SG-23b	Southway Drive (South), North Common	Some local demand but demand will be limited. Potential for alternative mixed-use development to include industrial.
SG-24	Hanham Business Park	Well located and reasonable modern buildings that are attract to the market - retain as employment
SG-25	Former Kleeneze Site	Some local demand but demand will be limited. Potential for mixed use scheme.
SG-27	Hayward Industrial Estate	Some local demand but demand will be limited. Potential for alternative uses such as gyms, local focused serviced offices, or small cottage industries etc
SG-28	2-8 London Road, Warmley	Offers secondary accommodation to the market - should be retained for industrial/trade counter uses.

Yate and Surrounding Areas		
Yate and the area surrounding it is reasonable well located. The area is attractive to local and regional companies looking to serve the wider region. The planned changes to connectively especially improved links to the M4 will increase this demand and potentially attract more regional and national companies to the area. The majority of interest will be from the industrial sector looking to get direct access to the national motorway network. Office demand will remain from local and regional companies.		
Site ID	**Site Name**	**2024 Market Commentary**
SG-29	Beeches Industrial Estate, Yate	Offers secondary industrial accommodation to the market providing affordable space to local occupiers - should be retained
SG-30	Bowling Hill, Chipping Sodbury	Offers secondary accommodation to the market - should be retained. Office space to the south of Station Road provides modern open plan space whilst the northern commercial space is more traditional industrial uses.
SG-31	Broad Lane, Yate	Offers secondary accommodation to the local market - should be retained
SG-32	Council Offices, Badminton Road	Limited demand for offices in location. If the existing tenant was to relocate, demand from a single occupier would be limited and it is likely that the building will become multi-let.
SG-33	Great Western Business Park, Yate	Well located and reasonable modern buildings that are attractive to the market - retain as employment
SG-34	Indesit Site, Station Road	Some potential local demand but demand will be limited due to poorer quality buildings than other sites in Yate. Potential for redevelopment to provide modern industrial units or alternative uses.
SG-35	The Ridge, Yate	Well located and reasonable modern buildings that are attractive to the market - retain as employment.
SG-36	Westerleigh Business Park, Yate	Well located and reasonable modern buildings that are attractive to the market - retain as employment.
SG-39	Arnold Fields Trading Estate, Wickwar	Some potential local demand but demand will be limited. Planning has been approved for Industrial/ storage uses on vacant plot.
SG-40	Old Cider Mill Trading Estate	Some local demand but demand will be limited. Potential for alternative development to provide local employment or community facilities.
SG-42	Station Premises and Yard, Winterbourne	Some local industrial demand but demand will be limited.
SG-53	Badminton Court and Dairy Crest Site	Well located and reasonable modern buildings that are attractive to the market - retain as employment.

SG-55	Hatters Lane	Some local demand but demand will be limited. Existing condition maintains affordable units due to the lower specification achieving lower rents. There is potential for the site to be redeveloped longer term to provide small business units (B2,B8,E) to meet the needs of local occupiers retaining employment on the site.
SG-57	Stover Road and North Road Industrial Estate	Well located and reasonable modern buildings that are attractive to the market - retain as employment.
SG-58	Badminton Road Trading Estate	Well located and reasonable modern buildings that are attractive to the market - retain as employment.

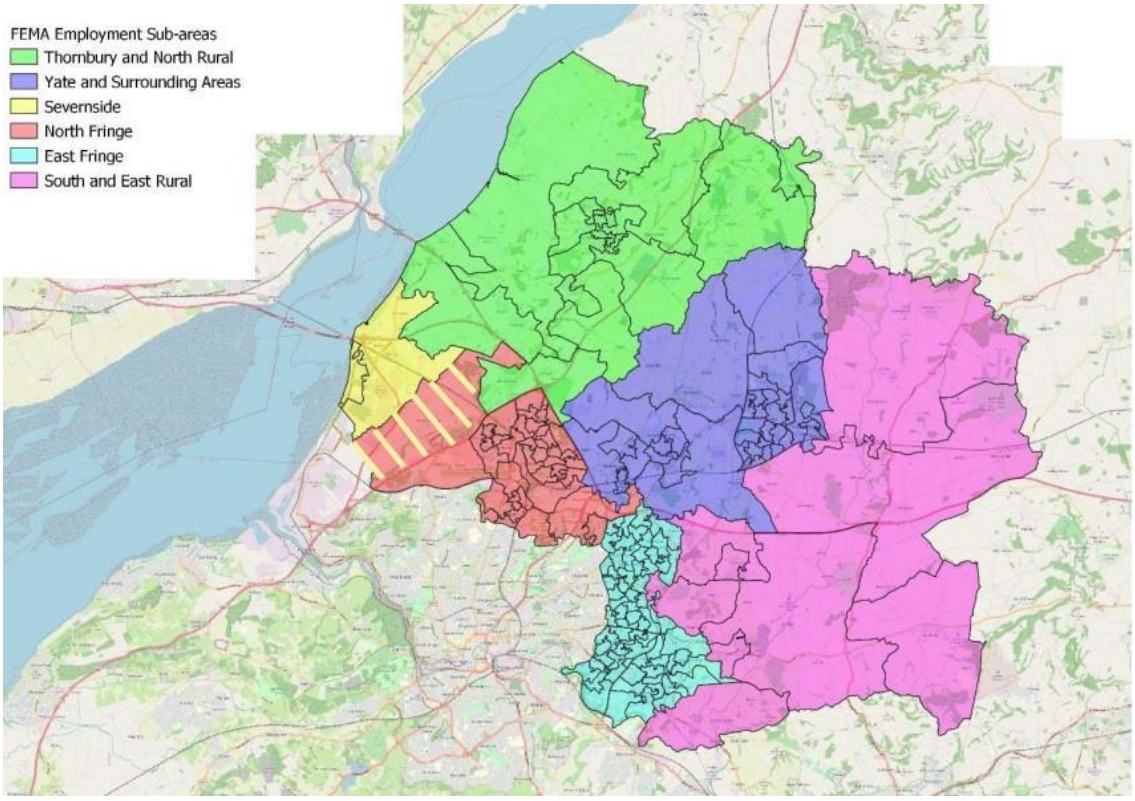
Thornbury and North Rural		
Thornbury commercial market is centred around local demand. The area attracts local office and regional / local industrial occupiers who look to benefit from the connectivity to the motorway network and access to the North Fringe region. This demand will continue to be focused on local demand servicing the local community and the wider region.		
Site ID	**Site Name**	**2024 Market Commentary**
SG-37	Thornbury Industrial Estate	Well located and reasonable modern buildings that are attractive to the market due to limited supply in local area. Demand from local and regional companies in area remains steady so retain as employment.
SG-43	Station Road, Charfield	Some local demand but demand will be limited. Potential for alternative development to provide community uses or a small-scale office/industrial scheme.

South and East Rural		
The area known as the South and East area of the region remains attractive to local demand. The access is not as attractive as other areas of the region but alongside the East Fringe the area main demand is centred around local and regional industrial demand. The area could serve as a good location for companies looking to relocate or expand in the sub-region while retaining their existing workforce. This area could house local and regional business in sectors such as distribution and last mile logistics.		
Site ID	**Site Name**	**2024 Market Commentary**
SG-26	Bath Road, Bitton	Some local demand but demand will be limited. Potential for alternative mixed-use development to include industrial.
SG-41	Pucklechurch Trading Estate	Some local demand but demand will be limited. Potential for longer term redevelopment for industrial uses.
SG-44	Sunguard Vivista Premises, Marshfield	Some local demand but demand will be limited. Potential for alternative development to provide community uses or small-scale offices.

Severnside		
Important location with good demand from employment. Encourage development to complement what is the premier industrial location in the region. Alongside industrial development there will be demand in the area for lower levels of amenities space to serve the growing working population in the area.		
Site ID	**Site Name**	**2024 Market Commentary**
SG-45a	Severnside Employment Area (Westgate)	Area is very attractive industrial companies especially in the distribution and logistics sectors. Significant land available for development which will be attractive for regional, national and international occupiers. Given the location and opportunity the site remains and important site to protect for employment as it offers the largest opportunity for development of industrial in the region.
SG-45b	Severnside Employment Area (Central Park South)	Area and location is attractive to variety of industrial occupiers. Demand from regional, national and international companies especially in distribution, manufacturing and logistics. Limited demand form offices or R&D unless associated with other uses. Large site for redevelopment should be protected for commercial uses however opportunity to look at site alongside other available sites and cater for smaller scale demand which remains high.
SG-45c	Severnside Employment Area (Central Park)	Good demand from industrial occupiers in location. Varity of demand in terms of size and sector, although mainly focused on distribution and logistics. Alongside development opportunities area has opportunity for intensification of existing stock. Highly desirable industrial location that should be safeguarded for employment uses.
SG-45d	Severnside Employment Area (Old Power Station Site)	Good demand from industrial occupiers in location. Varity of demand in terms of size and sectors. Alongside development opportunities area has opportunity for intensification of existing stock. Highly desirable industrial location that should be safeguarded for employment uses. Although given previous uses future development will be tempered by cleaner sites located nearby being more cost effective to develop.
SG-45e	Severnside Employment Area (Mount Park and Surroundings)	Highly attractive site for industrial uses, mainly focused on distribution and logistics. As evidenced by recent developments. The location remains attractive to the market and planned developments will further Severnside location as prime industrial area in the wider region. Area needs to be protected for industrial use and development encouraged.

Appendix

Functional Economic Marketing Area (FEMA) Sub-Zone determination for South Gloucestershire



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Source: South Gloucestershire Employment Land Review (January 2022)