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ADDENDUM TO FINAL REPORT

South Gloucestershire Future Economic Needs Assessment

February 2025



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Document control

JOB NUMBER	VERSION NUMBER	APPROVED BY	DATE
24 09 04	5.0	SNH	27/02/2025

1 Introduction

1.1 HJA has been instructed by South Gloucestershire Council (SGC) to review the implications of changes to the level of housing provision contained within its Draft Local Plan and updates to monitoring data, on the conclusions of the South Gloucestershire Future Economic Needs Assessment (FENA) (Final Report, December 2023).

1.2 This addendum to the previous report sets out further evidence and considers the validity of previous conclusions in light of the changes to the level of housing provision within the plan, as well as updating the employment land supply position following a further year of monitoring records becoming available.

Structure of this report

1.3 The remainder of this report is structured as follows:

- Chapter 2 considers the potential implications of proposed higher housing numbers on the South Gloucestershire workforce;
- Chapter 3 sets out illustrative scenarios to help understand how additional jobs, in response to any increased labour supply, might be distributed across sectors;
- Chapter 4 considers the potential employment sites and premises implications of the alternate economic scenarios, comparing the results with those set out within the previous report;
- Chapter 5 sets out an update to the employment sites and premises supply position for South Gloucestershire, taking into account the most up to date monitoring data;
- Chapter 6 considers the potential implications of proposed policies which amend the supply position; and
- Chapter 7 sets out summary conclusions.

2 Higher Housing Provision

2.1 This chapter considers the implications of higher housing provision in South Gloucestershire on the future workforce.

Changes to housing provision

2.2 At the time of the original FENA the demographic and housing evidence was set out within the Local Housing Needs Assessment (LHNA) [ORS, 2022]. This identified a need for 20,490 homes to be provided across South Gloucestershire.

2.3 The housing number included within the South Gloucestershire Local Plan has now changed to 22,573. This represents an increase of 2,083 homes across the 15-year Local Plan period[1] (hereafter 'plan period').

Link to economy and employment

2.4 Planning Practice Guidance (PPG) sets out how economic needs assessments should be undertaken. Paragraph 27[2] sets out advice to consider *"demographically derived assessments of current and future local labour supply"*.

2.5 When considering labour demand and labour supply-based approaches Local Planning Authorities can establish internal consistency within their Local Plans. Without appropriate alignment (i.e. planning for far too many or too few jobs relative to workers) Local Plans can set the conditions for increased levels of commuting (either in or out from an area), unemployment or unfilled vacancies for local employers.

2.6 Within the FENA the alignment between the employment forecasts (labour demand) and demographic analysis (labour supply) was tested. This analysis took account of forecast population change by age, economic activity rates, unemployment, commuting and double jobbing in order to estimate the number of jobs within South Gloucestershire required to maintain a balanced labour market.

Labour force implications of higher housing provision

2.7 Additional housing provision does not in and of itself mean additional population. At one end of the scale all additional housing could be taken up by households newly forming from within the existing population of an area. At the opposing end, all housing could be taken up by new residents moving to an area. In terms of total population change these two approaches provide potential 'bookends' to the scale. The reality is probably somewhere within the range.

2.8 For the purposes of this assessment HJA has estimated potential population change associated with higher housing provision based on assumptions derived from the previously published LHNA for South Gloucestershire. In particular, the ratio between dwellings and population in the LHNA is retained and applied to the proposed higher housing number

[1] The plan period has also been shifted to 2026/27 – 2040/41.
[2] Reference ID:2a-027-20190220

proposed[3]. In addition, the working age population is also assumed to be in line with previous analysis.

2.9 From the estimate of working age population the same process for estimating a South Gloucestershire based job requirement as was used in the FENA is applied.

2.10 The result of this analysis is a need for 27,500 jobs within South Gloucestershire over the period 2023-2043. This is an increase of 2,500 jobs from the estimate in the original FENA.

2.11 The total scale of jobs growth remains lower than the level of jobs growth achieved over the twenty-year period 2001-21 (45,000 additional jobs). This lower level of growth reflects both expectations of labour demand and supply. However, it helps to contextualise the increased jobs requirement, and shows that growth in excess of the level required has been delivered in the past and the uplift considered in this addendum is not outside the bounds of plausibility.

Summary

2.12 It is estimated that an increase of 2,083 dwellings to be provided within the South Gloucestershire Local Plan will require an additional 2,500 jobs to be provided within South Gloucestershire in order to maintain a balanced labour market over the period 2023-2043. The higher level of jobs growth remains within the bounds of historic jobs growth and does not suggest any issues of implausibility.

[3] The Future Economic Needs Assessment considered a 20 year analysis period 2023-43. The additional housing is applied to derive an estimate of the population at the end of the plan period, with the same extrapolation applied for the final three years of the analysis period as was utilised in the original FENA.

3 Sectoral Employment Scenarios

3.1 This chapter sets out how the increased level of jobs in South Gloucestershire might be spread across the sectors of the economy.

3.2 The December 2023 FENA drew on two sets of economic forecasts, from Oxford Economics (OE) and Cambridge Econometrics (CE). These provided two views of the scale and profile of employment growth within South Gloucestershire over the period 2023-2043.

3.3 As part of the 2023 FENA some adjustment to sectoral forecasts was required to bring about alignment with the labour supply projections. In particular this included adjustment to the Oxford Economics baseline forecasts.

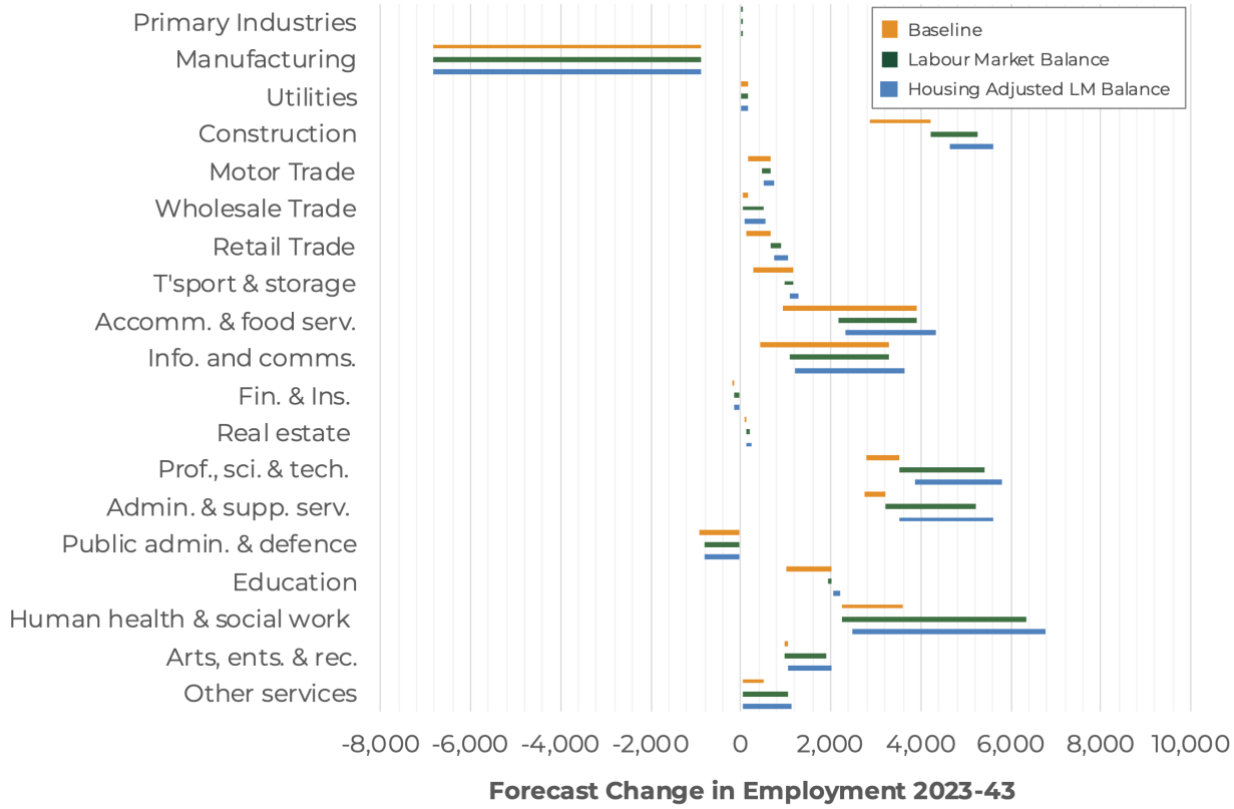
3.4 The same approach to uplifting baseline forecasts has been applied as part of this exercise. This has been applied to both the Cambridge Econometrics and Oxford Economics forecasts. This ensures the differing views of the two forecasters around sectoral performance are retained.

3.5 Figure 3.1 illustrates the range of sectoral employment change under three scenarios:

- The original baseline forecasts from OE and CE;
- The FENA 2023 labour market balance scenario;
- The 2025 Addendum housing adjusted labour market balance scenario.

3.6 This shows relatively modest upward adjustments to sectors already forecast to grow in comparison to the previous labour market balance scenario.

Figure 3.1 Scenarios for Sectoral Employment Change 2023-2043



Source: HJA based on Oxford Economics and Cambridge Econometrics

4 Implications for Future Employment Sites & Premises Requirements

4.1 The preceding chapters have set out how additional housing provision will require additional local job opportunities in order to maintain labour market balance, and modelled how additional job growth might be distributed across sectors of the economy.

4.2 The key question for the Local Plan is what implications this has for the future requirement for sites and premises to support the economy.

4.3 The revised sectoral economic projections have been used as an input to the same methodology as within the 2023 FENA. This ensures consistency with previously reported estimates of future requirements.

4.4 Set out below are a series of tables based on those included within the 2023 FENA, with additional columns included setting out the revised estimates.

4.5 Table 4:1 shows how the revised employment forecasts are spread across sectors. This shows an additional 400 – 600 jobs within the Use Classes relevant to the FENA (comparing CE against CE and OE with OE). The largest discrepancy between the two forecasters relates to B2 activities, resulting from the much more pessimistic view of the manufacturing sector (in employment terms) within the OE forecasts.

4.6 Other uses that have the most substantial employment implications are retail (E(a)/E(b)), health and social care (C2/E(e)), and education (E(f)/F1(a)).

4.7 The most substantial contributor to overall employment change is the None and homeworking category, which accounts for around 40% of additional jobs. There is no floorspace demand associated with this category.

4.8 Table 4:2 sets out the net additional employment demand implied by the forecast changes in employment by Use Class. When compared to the 2023 FENA this shows increases in the requirement for office[4] and laboratory space and warehousing space, and a slight reduction in the potential decline in industrial space.

[4] It is noted that the office market is currently relatively quiet, particularly in out of town locations. This has been reported to be the case in South Gloucestershire via Council engagement with local commercial agents. It should be recognised that this analysis is considering long term trends based on modelled employment change. Over the course of a 20 year period there will be substantial changes in market sentiment. At the current time the commercial office market is continuing to adjust to changing working practices exacerbated by the Covid-19 pandemic, including the widespread use of hybrid working. The long term implications of this are still uncertain, with reports of increasing number of organisations increasing the proportion of time its employees are expected to be present within offices. Key trends that are emerging are for attractive office locations to offer a range of amenity uses for workers, excellent transport connectivity, and high quality office environments with strong sustainability (ESG) credentials.

Table 4:1: Estimated Change in Employment Across Use Classes (2023 to 2043)

[Update to Dec 2023 FENA Table 3.2]

Use Class	Description	Baseline		LM Balance		Housing Adjusted LM Balance	
		CE	OE	CE	OE	CE	OE
B2	**General industrial**	**-660**	**-6,000**	**-660**	**-6,000**	**–650**	**–5,700**
B8	**Storage or distribution**	**1,000**	**420**	**1,000**	**1,000**	**1,100**	**1,300**
C1	Hotels	410	110	410	240	440	260
C2	Residential institutions	580	880	580	2,000	630	1,600
C2a	Secure Residential Institution	10	10	10	20	10	20
E(a)	Display or retail sale of goods	1,000	490	1,000	2,000	1,100	1,700
E(b)	Sale of food and drink	1,000	370	1,000	830	1,600	890
E(c)(i)-(iii)	Financial & professional services	30	10	30	80	30	90
E(d)	Indoor sport and recreation	320	350	320	630	350	670
E(e)	Medical or health services	1,000	2,000	1,000	3,000	1,300	3,600
E(f)	Creche, day nursery/centre	240	440	240	810	260	860
E(g)(i)	**Offices**	**5,000**	**3,000**	**5,000**	**6,000**	**5,500**	**6,500**
E(g)(ii)	**Research and development**	**350**	**200**	**350**	**410**	**380**	**430**
E(g)(iii)	**Light industrial**	**120**	**-40**	**120**	**-**	**130**	**–**
F1(a)	Education	2,000	910	2,000	2,000	2,000	1,900
F1(b)-(g)	Non residential institutions	110	80	110	220	110	220
F2(a)-(d)	Local community uses	260	270	260	500	280	530
Sui Generis	Excluded from classification	2,000	850	2,000	2,000	2,100	2,000
None and homeworking		10,000	4,000	10,000	10,000	11,000	10,000
Total		**25,000**	**9,000**	**25,000**	**25,000**	**27,500**	**27,500**
'Employment' Uses Only		**6,000**	**-2,000**	**6,000**	**2,000**	**6,400**	**2,600**

Source: HJA

Note: CE Baseline did not need to be adjusted for labour market balance in the 2023 FENA. Therefore the CE Baseline figures also form the CE LM Balance position.

Table 4:2: Estimated Net Additional Employment Floorspace Demand by Use Class (2023 - 2043) sq m

[Update to Dec 2023 FENA Table 3.3]

Use Class	Description	Baseline		LM Balance		Housing Adjusted LM Balance	
		CE	OE	CE	OE	CE	OE
E(g)(i)	Offices	60,400	34,300	60,400	72,200	65,600	76,800
E(g)(ii)	Research & development	19,400	11,200	19,400	22,200	21,000	23,500
	Office & Laboratory	**79,800**	**45,500**	**79,800**	**94,400**	**86,600**	**100,300**
E(g)(iii)	Light industrial	4,800	-2,540	4,800	-700)	5,260	-530
B2	General industrial	-24,200	-208,900	-24,200	-207,000	-24,000	-206,800
	Industrial	**-19,400**	**-211,500**	**-19,400**	**-207,800**	**-18,800**	**-207,400**
B8	**Storage or distribution**	**73,500**	**30,500**	**73,500**	**87,900**	**79,500**	**94,800**

Source: HJA

4.11 The following pages include updates to the tables from the 2023 FENA for the office, industrial, and warehousing & logistics sectors. These show:

- A slight increase in the overall requirement for office floorspace;
- No change to industrial requirements; and
- A slight increase in the overall requirement for warehousing and logistics floorspace and land requirements.

4.12 The scale of change is very minor, as a result of the more significant influence of replacement provision on the drivers of total future requirements.

Office & Laboratory Requirements

Table 4:3: Net Office and Laboratory Floorspace Requirements 2023 - 2043 (sq m)

[Update to Dec 2023 FENA Table 3.5]

		Baseline Forecasts	LM Balance Scenario	Updated LM Balance
A	Net Additional Requirement	45,000 – 80,000	80,000 – 94,000	87,000 – 100,000
B	Replacement Provision	203,000	203,000	203,000
C = A+B	Gross Requirement	248,000 – 283,000	283,000 – 297,000	290,000 – 303,000
D	Flexibility allowance	25,000 – 28,000	28,000 – 30,000	29,000 – 30,000
E = C+D	Total Requirement	273,000 – 311,000	311,000 – 327,000	319,000 – 334,000
F	Delivered on Existing Employment Sites	133,000 – 152,000	152,000 – 160,000	156,000 – 163,000
G = E-F	**Net Requirement**	**140,000 – 159,000**	**159,000 – 167,000**	**163,000 – 171,000**

Table 4:4: Net Office and Laboratory Floorspace Requirements Five-Year Intervals (sq m)

[Update to Dec 2023 FENA Table 3.6]

	Baseline Forecasts	LM Balance Scenario	Updated LM Balance
2023–2028	40,000 – 41,000	41,000 – 58,000	42,000 – 60,000
2028–2033	34,000 – 40,000	38,000 – 40,000	39,000 – 41,000
2033–2038	33,000 – 40,000	37,000 – 40,000	37,000 – 41,000
2038–2043	32,000 – 39,000	34,000 – 39,000	34,000 – 40,000
2023 - 2043	**140,000 – 159,000**	**159,000 – 167,000**	**163,000 – 171,000**

Table 4:5: Office and Laboratory Employment Land Requirements Five-Year Intervals (ha)

[Update to Dec 2023 FENA Table 3.7]

	Baseline Forecasts	LM Balance Scenario	Updated LM Balance
2023–2028	5	5 – 7	5 - 8
2028–2033	4 – 5	5	5
2033–2038	4 – 5	5	5
2038–2043	4 – 5	4 – 5	4 – 5
2023 - 2043	**17 – 20**	**20 – 21**	**20 – 21**

Industrial Requirements

Table 4:6: Net Industrial Floorspace Requirements 2023 - 2043 (sq m)

[Update to Dec 2023 FENA Table 3.8]

		Baseline Forecasts	LM Balance Scenario	Updated LM Balance
A	Net Additional Requirement	(211,000)– (19,000)	(208,000) – (19,000)	(207,000) – (19,000)
B	Replacement Provision	260,000	260,000	260,000
C = A+B	Gross Requirement	48,000 – 240,000	52,000 – 240,000	52,000 – 241,000
D	Flexibility allowance	5,000 – 24,000	5,000 – 24,000	5,000 – 24,000
E = C+D	Total Requirement	53,000 – 264,000	57,000 – 264,000	58,000 – 265,000
F	Delivered on Existing Employment Sites	29,000 – 146,000	31,000 – 146,000	32,000 – 146,000
G = E-F	**Net Requirement**	**24,000 – 119,000**	**26,000 – 119,000**	**26,000 – 119,000**

Table 4:7: Industrial Employment Land Requirements Five-Year Intervals (ha)

[Update to Dec 2023 FENA Table 3.9]

	Baseline Forecasts	LM Balance Scenario	Updated LM Balance
2023–2028	2 – 6	3 – 6	3 – 6
2028–2033	1 – 8	1 – 8	1 – 8
2033–2038	1 – 8	1 – 8	1 – 8
2038–2043	2 – 8	2 – 8	2 – 8
2023 - 2043	**6 – 30**	**6 – 30**	**6 – 30**

Warehousing and Logistics Requirements

Table 4:8: Net Warehousing & Logistics Floorspace Requirements 2023 - 2043 (sq m) [Update to Dec 2023 FENA Table 3.10]

		Baseline Forecasts	LM Balance Scenario	Updated LM Balance
A	Net Additional Requirement	30,000 – 73,000	73,000 – 88,000	79,000 – 95,000
B	Replacement Provision	519,000	519,000	519,000
C = A+B	Gross Requirement	549,000 – 592,000	592,000 – 607,000	598,000 – 614,000
D	Flexibility allowance	55,000 – 59,000	59,000 – 61,000	60,000 – 61,000
E = C+D	Total Requirement	604,000 – 652,000	651,000 – 667,000	658,000 – 675,000
F	Delivered on Existing Employment Sites	129,000 – 139,000	139,000 – 142,000	140,000 – 144,000
G = E-F	**Net Requirement**	**476,000 – 513,000**	**513,000 – 525,000**	**518,000 – 531,000**

Table 4:9: Warehousing & Logistics Employment Land Requirements Five-Year Intervals (ha) [Update to Dec 2023 FENA Table 3.11]

	Baseline Forecasts	LM Balance Scenario	Updated LM Balance
2023–2028	27 – 28	27 – 37	27 – 38
2028–2033	22 – 26	23 – 26	23 – 26
2033–2038	23 – 25	23 – 25	23 – 25
2038–2043	22 – 24	22 – 24	22 – 25
2023 - 2043	**95 – 103**	**103 – 105**	**104 – 106**

5 Updated Employment Sites & Premises Supply

5.1 This chapter of the report updates the analysis set out within Chapter 5 of the December 2023 FENA. This adjusts for monitoring records collated and provided by South Gloucestershire Council up to the end of the fiscal year 2022/23 and ensures the available supply position aligns to the start of the demand forecast period.

5.2 The method applied in the updated analysis is the same as that used in the December 2023 FENA.

Site Allocations

5.3 Table 5:1 provides a summary of the total employment allocations by Use Class.

5.4 There is currently a very limited supply of allocated land, totalling less than 13 hectares. This is, in part, a quirk of a large-scale extant consent on land at Severnside (which lead to substantial capacity within the consented supply assessment).

5.5 A total of 8.3 hectares of land is allocate for industrial and warehouse uses, with 4.3 hectares allocated for office and R&D uses. Office and R&D space is also estimated in floorspace terms to allow comparison with the future requirements assessment given highly variable development densities. This indicates capacity for approximately 27,400 sq m of office and R&D development.

Table 5:1: All South Gloucestershire site allocations without consents, summary

	Office & R&D (sq m)	Office (ha)	R&D (ha)	Industrial (ha)	Warehouse (ha)	Total (ha)
Allocated sites	27,400*	2.1	2.2	4.3	4.0	**12.7**

Figures may not sum due to rounding * indicative office and R&D floorspace capacity

Consented supply

Gains

5.6 Table 5:2 presents gross gains of consented developments within South Gloucestershire. This shows a very large potential supply of B8 warehousing & logistics floorspace, predominantly through the historic 1957 consent at Severnside. In aggregate consented supply exceeds 1.2 million sq m, equivalent to almost 240 hectares of land area.

5.7 The recently completed Panattoni scheme at Severnside is included within the consented supply as it remained vacant at the start of the analysis period and will therefore contribute towards supply. This is treated as a special case due to its large size and to exclude it would create a misleading picture of the supply position.

Table 5:2: South Gloucestershire supply gross gains[5]

	Office	R&D	Industrial	Warehouse	Total
Floorspace (sq m)	116,700	39,100	114,600	938,200	**1,208,600**
Land (ha)	14.6	7.8	28.7	187.6	**238.7**

Figures may not sum due to rounding

Losses

5.8 Extant consents will also lead to losses of some employment land supply. These are summarised in Table 5:3. This totals approximately 60,000 sq m of floorspace on 13 hectares of land. Losses such as these highlight the need for replacement provision. The estimates in Table 5:3 capture only those schemes which are currently permitted and are highly unlikely to be a complete picture of all losses throughout an entire plan period.

Table 5:3: South Gloucestershire supply gross losses

	Office	R&D	Industrial	Warehouse	Total
Floorspace (sq m)	6,600	0	46,500	4,200	**57,400**
Land (ha)	0.8	0	11.6	0.8	**13.3**

Figures may not sum due to rounding

Employment site re-use

5.9 To enable consistent comparison with the future requirements analysis it is helpful to consider the supply position after removing schemes which deliver re-use of employment sites. Table 5:4 sets out the volume of new floorspace, and equivalent land area, which is currently consented on sites previously developed for employment purposes[6].

Table 5:4: South Gloucestershire supply re-use gains

	Office	R&D	Industrial	Warehouse	Total
Floorspace (sq m)	18,300	1,600	2,400	1,200	**23,400**
Land (ha)	2.3	0.3	0.6	0.2	**3.4**

Figures may not sum due to rounding

5.10 There is also additional capacity at Severnside which does not benefit from extant consent due to previous development which will play a role in facilitating further re-use. This includes the former Avon power station site[7]. This additional capacity comprises 36 hectares of land which may accommodate in excess of 175,000 sq m of new logistics and industrial development if brought forward[8]. This is not included within any of the tables within this chapter. This could

[5] A revised large scale application is currently under consideration for the former Filton Airfield site. This proposes an additional 190,000sqm of office space and 24,000 sqm of industrial uses when compared to the extant consent which is included within Table 5.3. Should this be permitted this would have a very significant impact on the potential supply of office space.
[6] This may only be partial as it draws only on schemes where the loss of employment floorspace forms part of the same application as reprovision. Sites which have previously had employment floorspace demolished are not included.
[7] The former Avlon Works site has been granted consent since the 2023 FENA and is now included within consented supply.
[8] Assumed 90% B8 warehousing and 10% B2 industrial.

help to meet a substantial proportion of the estimated industrial and warehousing reuse requirements set out in the previous chapter of this report.

Net position

5.11 Table 5:5 provides a summary of the net position of consented supply after excluding re-use. This is consistent with the future requirements position set out in Chapter 4.

5.12 Overall, South Gloucestershire has a net supply of 222 ha of consented employment land. The vast majority of consented supply in South Gloucestershire falls under Use Class B8 (warehousing).

Table 5:5: South Gloucestershire consented supply (gains less losses) excluding re-use

	Office	R&D	Industrial	Warehouse	Total
Floorspace (sq m)	91,800	37,500	65,700	932,800	**1,127,800**
Land (ha)	11.5	7.5	16.4	186.5	**222.0**

Figures may not sum due to rounding

Total supply

5.13 From the site allocation and permissions data, it can be seen that South Gloucestershire has a total quantitative supply of 234.5 hectares of employment land which can contribute to meeting the needs set out in Chapter 4 of this report. Table 5:6 provides a summary of supply position across the Unitary Authority area.

Table 5:6: Total supply across South Gloucestershire

	Office & R&D (sq m)	Office (ha)	R&D (ha)	Industrial (ha)	Warehouse (ha)[9]	Total (ha)
Site Allocations	27,400	2.1	2.2	4.3	4.0	**12.7**
Consented Supply (Net of re-use)	129,300	11.5	7.5	16.4	186.5	**222.0**
Total	**171,200**	**13.5**	**9.7**	**20.7**	**190.5**	**234.5**
Re-use (consented and non-consented)	*19,900*	*2.3*	*0.3*	*4.2*	*32.6*	***39.4***

5.14 As set out at paragraph 5.10 above, there is also further quantitative capacity to meet the reuse needs of the industrial and warehousing sector. Table 5:6 provides a quantitative estimate of current re-use capacity. This includes both current extant consents and the identified plots at Severnside. It should be noted that this only captures the picture at the current point in time, and further employment site re-use should be anticipated through the plan period. The balance of industrial and warehousing is potentially flexible.

[9] Consented supply includes potential contribution of re-use sites at Severnside (18.4ha). To avoid double counting the total volume of re-use sites for warehousing is also expressed as a range. When interpreting the table, the reader should not utilise the top end of the range for both consented supply and re-use supply in addition.

Summary of changes

5.15 The updates to the supply position indicate the following changes since the December 2023 FENA:

- Marginal adjustment to allocated supply through some reprofiling of potential uses.
- Marginal changes to consented gains. This includes reductions to office and industrial supply but increases to R&D and warehousing.
- Reduction to consented losses.
- Reduced amount of consented reuse of employment sites.
- Reduction In overall consented supply.

5.16 Overall the updates indicate some reduction in supply in terms of allocated land, consented schemes and potential for reuse when compared to the 2023 FENA position.

6 Implications of Local Plan Allocations on Employment Supply

6.1 This chapter considers the impact of site allocations within the Draft Local Plan on the supply position set out in Chapter 5. This includes policy proposals to both add and remove sites from the employment supply.

Relevant Changes

6.2 Table 6:1 sets out the site allocation proposals which will impact on the employment sites supply position.

6.3 There are six existing employment allocations which are proposed to incorporate residential development on at least part of the allocated employment area. As noted in Table 6:1, three of those sites were already discounted from the supply position in the preceding chapter as they were anticipated not being available supply during the new Local Plan period. Therefore, no further quantitative adjustment is made. As a result of these proposed allocations 19.1 hectares of employment land would be lost.

6.4 Ten sites incorporate proposed employment allocations. These total 49.8 hectares of additional supply and include sites ranging in size from 0.5 to 16.6 hectares. The majority of this is allocated for the full range of E(g), B2 and B8 employment uses.

6.5 There are two further sites within the consented supply figures set out in Chapter 5 which are proposed for allocation as residential use[10]. These comprise a total of 4.6 hectares. Whilst the extant employment consents could be implemented, there is clear potential for these sites to be lost from the employment supply.

6.6 The net position after considering these proposed allocations is an increase in employment land supply of 26.1 hectares of employment land. This has flexibility to be utilised for different employment uses. This increases total supply (excluding re-use) to 260.6 hectares when added to the figures from Table 5:6.

6.7 A full schedule of sites which comprise the available supply is provided as a separate annex to this report.

[10] Located at Yate, consented under Planning Application Reference PK12/1913/O

Table 6:1 Proposed Local Plan Allocations Impacting Employment Land Supply

Site ID	Employment Area Name	Use Class	Change in Area Allocated (ha)
	Losses		
SEA7	Land West of A38 and South of Hallen Railway Line	E(g), B2, B8	-2.9
SEA10	Parkway Business Park	E(g)(i)	-15.1
SEA12c	Emersons Green (Vertex Park and Residual)	E(g), B2, B8	N/A *(-4.8)*
SEA19b	North of Douglas Road (Lucas Works)	E(g)(iii), B2	-1.1
SEA25	Former Kleeneze Site	B8 (demolished/ vacant)	N/A *(-2.3)*
SEA51	University of the West of England	E(g), B2 (land vacant)	N/A *(-9.2)*
	Gains		
SEA45g	Severnside Employment Area (Land East of B4055, Pilning Station)	E(g)(iii), B2, B8	13.6
SEA59	North Lyde 'ecotech' Village	E(g), B2, B8	16.6
SEA60	Carsons Green and Rockhouse Farm New Neighbourhoods - 3 Land Parcels	E(g), B2, B8	5.8
SEA61	Glenfern and Land to the East of Carsons Road	E(g), B2, B8	2.6
SEA62	West of Carsons Road	E(g), B2, B8	4.6
SEA64	Homeapple Close, Bridgeyate	B2, B8	0.5
SEA65	Land at Rushmore Dairy, Badminton	E(g)(i), B2, B8	0.8
SEA66	Buffer Depot, Acton Turville	E(g), B2, B8	3.0
SEA68	Oaklands Drive, Almondsbury	E(g)	1.1
SEA69	Woodend Farm, Woodend Lane, Cromhall	E(g)(i)	1.2
	Total		**30.7**

Sites SEA12c, SEA25 and SEA51 are shown as N/A as the adjustments were already included in supply data considered in Chapter 5 of this report. *Figures may not sum due to rounding.*

7 Summary Conclusions

7.1 This addendum report considers the potential implications of changes to the proposed housing provision, employment supply monitoring data and employment site policies in the South Gloucestershire Draft Local Plan on the December 2023 FENA.

Increased employment need

7.2 Changes to proposed housing provision include an increase of 2,083 homes in South Gloucestershire from the number assumed within the original FENA.

7.3 It is estimated that this will require an additional 2,500 jobs to be provided within South Gloucestershire over the period 2023-2043 in order to maintain a balanced labour market. The higher level of jobs growth remains within the bounds of historic jobs growth and does not suggest any issues of implausibility.

7.4 This will require higher levels of employment growth across the economy.

Increased employment sites and premises requirement

7.5 Utilising the same modelling methodology as within the 2023 FENA the increased employment scenario suggests:

- A slight increase in the overall requirement for office floorspace;
- No change to industrial requirements; and
- A slight increase in the overall requirement for warehousing and logistics floorspace and land requirements.

7.6 The scale of change is very minor.

Similar employment sites and premises supply

7.7 Updates to the current supply position, to take into account the most up to date monitoring records show a reduction from the 2023 FENA position in terms of allocations, consented schemes and potential for site reuse.

7.8 After adjustments are made for proposed allocations within the Draft Local Plan the supply position (excluding re-use) is broadly similar, with a total estimate of 260.6 hectares compared to an estimated 247.3 – 260.7 hectares in the 2023 FENA.

Balance of employment sites and premises supply and demand

7.9 Whilst there has been a slight increase in requirements and a slight reduction in supply there remains sufficient supply in quantitative terms. On face value the industrial supply is lower than requirements, however, there is potential for sites at Severnside to be used for industrial purposes.

7.10 The broader qualitative conclusions of the 2023 FENA remain.

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