

EB 073

Employment Land Review

Local Development Framework 2001 - 2021



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Chelmsford
City Council

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I How we have got to this point

Section I How we have got to this point

I.1 This document provides an evidence base to inform employment policies and land provision in the City Council's next Local Plan. The document updates the City Council's previous Employment Land Reviews (2006 and 2009) and will be used to provide an evidence base, consistent with the requirements of the National Planning Policy Framework (NPPF) and the National Planning Practice Guidance (PPG), to feed into the City Council's future Strategic Economic Growth Strategy. Collectively the ELR and the Strategic Economic Growth Strategy will be used to inform future employment policies and land allocation within the next Local Plan.

I.2 A draft version of this document was published for seven weeks public consultation from 9th October 2014 to 27th November 2014. As a result of this consultation 42 comments were received from 27 individuals/organisations. These comments have been considered in a feedback report which has been published, and the comments have been taken into account in producing this final document.

Section 2 Executive Summary

Background to the Employment Land Review

2.1 In September 2013 Chelmsford City Council commenced an Employment Land Review (ELR). The key objective of the ELR is to identify potential growth, loss and change in employment land across Chelmsford City Council's administrative area. The document will be used to provide an evidence base, consistent with the requirements of the National Planning Policy Framework (NPPF) and the National Planning Practice Guidance (PPG), and will feed into the City Council's future Strategic Economic Growth Strategy. Collectively the ELR and the Strategic Economic Growth Strategy will be used to inform future employment policies and land allocation within the next Local Plan. The Review includes an assessment of the following:

Existing Planning Policy background

2.2 This section of the Review sets out the Policy background to this Employment Land Review, namely the relevant parts of:

- The National Planning Policy Framework (NPPF)
- The National Planning Practice Guidance (PPG)
- The South East Local Enterprise Partnership (LEP)
- Chelmsford City Council's Local Development Framework
- Chelmsford City Council's Corporate Plan.

Chelmsford's Economic Context

2.3 This sets the economic context for Chelmsford City Council's administrative area, to assist in understanding the size and nature of the local economy, and identifying the characteristics of the local population and labour market.

2.4 Chelmsford has a large professional, scientific and technical business sector. One of Chelmsford's key economic strengths is its breadth of sectors, with a balanced economy which has seen the unemployment rate fall to 1.8% in 2014. Approximately 40% of Chelmsford residents commute out of Chelmsford for work, primarily to London, as well as Harlow, Epping Forest, Brentwood and Basildon.

Changes to Existing Employment Land

2.5 This section of the Review is set out in three sections:

- Allocated Employment Areas
- Non-Allocated Employment Land Supply
- City Centre Employment Land Supply

2.6 For each of the areas identified above an assessment of the changes in type, amount and location of different employment uses has been carried out for the period 2003 to 2013.

Current and Future Employment Land Supply

2.7 This analysis is divided into the following areas to gain an overall picture of future supply:

2 Executive Summary

- Current Supply in Chelmsford City Centre
- Current Supply within the Business Parks on the edge of urban Chelmsford
- Vacant Commercial Space
- Expected Future Land Supply

2.8 These sections cover an assessment of vacant employment floorspace at present time and considers the expected supply of new employment floorspace, based on existing site allocations and planning permissions. From this it is possible to ascertain the current and future employment land supply in Chelmsford's administrative area.

Future Demand for Employment Land

2.9 This section of the Review considers two possible future growth scenarios for Chelmsford and considers the level of employment floorspace each scenario would require. The current and future employment land supply identified in the previous sections of the Review are compared with these growth scenarios to identify any surplus or deficit in floorspace for different types of employment, and therefore suggest the possible levels of provision required in any future Local Plan.

2.10 The Review suggests that there is:

- A significant undersupply of office floorspace in both growth scenarios.
- A broad balance between supply and demand in the retail/leisure sector in both growth scenarios.
- A broad balance of industrial/warehousing floorspace in one scenario, but an undersupply in a high growth scenario.

Conclusions

2.11 The main conclusions for Chelmsford's administrative area drawn from this Review can be summarised as being:

- A strongly performing economy that has seen a growing commercial sector in recent years.
- Allocated Employment Areas with limited capacity to expand and few vacancies at the present time.
- An apparent shift of uses within the 29 allocated Employment Areas beyond the B Use Classes.
- The rural area is making a significant contribution to business floorspace provision with some key non-allocated employment locations.
- A strong City Centre with higher levels of office floorspace than any other town in Essex, but less than other regional cities.
- A City Centre with a strongly performing retail sector
- A significant proportion of available second hand office space in the City Centre.
- A shortage of Grade A office development opportunities in the City Centre.
- Limited greenfield employment opportunities on the edge of the City Centre.
- A likely time lag between existing employment land being taken up and new employment land coming onto the market.
- A good match between supply and demand in relation to office based growth.
- A tight land supply position in relation to industrial and warehousing based growth.
- An available supply is key to attracting investment.
- A need for a flexible supply to support a range of sectors.

Section 3 Introduction

Purpose of this Document

3.1 The purpose of the Employment Land Review (ELR) is to identify the potential growth, loss and change of employment land across Chelmsford City Council's administrative area. It is also an assessment of the current supply of land, and monitors trends affecting employment land and premises.

3.2 The document updates the City Council's previous Employment Land Reviews (2006 and 2009) and will be used to provide an evidence base, consistent with the requirements of the National Planning Policy Framework (NPPF) and the National Planning Practice Guidance (PPG), to feed into the City Council's future Strategic Economic Growth Strategy. Collectively the ELR and the Strategic Economic Growth Strategy will be used to inform future employment policies and land allocation within the next Local Plan.

Scope of Document

3.3 This Employment Land Review (ELR) analyses existing and projected supply and demand for employment space in:

- All existing employment areas allocated within the North Chelmsford Area Action Plan, Chelmsford Town Centre Area Action Plan and the Site Allocations Document.
- Other non-allocated employment areas, which are distributed across the 27 parishes in Chelmsford. This covers employment generated in the rural areas of Chelmsford.

3.4 The distribution of employment land, and the use and quality of existing sites is considered to gain an understanding of employment space currently available. Changes to employment areas, and patterns forming within these areas, over the period 2003-2013 are assessed. Future trends and projections for employment in Chelmsford's administrative area are also considered.

3.5 This document is the first stage in the assessment of future employment land requirements, but it does not allocate land for employment.

4 Policy Background

Section 4 Policy Background

Introduction

4.1 This section provides a summary of the relevant planning policy documents which relate to employment in Chelmsford and the requirements for an Employment Land Review. It looks at National, Regional, Sub-Regional and Local Policy.

4.2 Through the introduction of the Localism Act, Local Planning Authorities are responsible for assembling robust and reliable data to establish employment land requirement figures for their Local Plan. These targets will be tested through the Local Plan process.

National Planning Policy Framework

4.3 The National Planning Policy Framework (NPPF) (March 2012) replaces the suite of national Planning Policy Statements, Planning Policy Guidance notes, and some Circulars with a single document. The NPPF has a presumption in favour of sustainable development and private sector led growth is encouraged.

4.4 Paragraph 19 of the NPPF states that the Government is committed to ensuring that the planning system does everything it can to support sustainable economic growth. Planning should operate to encourage and not act as an impediment to sustainable growth. Therefore significant weight should be placed on the need to support economic growth through the planning system.

4.5 Paragraph 20 states that to help achieve economic growth, local planning authorities should plan pro-actively to meet the development needs of business and support an economy fit for the 21st century.

4.6 Paragraph 22 states that planning policies should avoid long term protection of sites allocated for employment use where there is no reasonable prospect of a site being used for that purpose. Land allocations should be regularly reviewed. Where there is no reasonable prospect of a site being used for the allocated employment use, applications for alternative uses of land or buildings should be treated on their merits having regard to market signals and the relative need for different land uses to support sustainable local communities.

4.7 Paragraph 28 states that planning policies should support economic growth in rural areas in order to create jobs and prosperity by taking a positive approach to sustainable new development.

4.8 Paragraph 160 deals with Plan Making and states that local planning authorities should have a clear understanding of business needs within the economic markets operating within and across their area.

4.9 It should also be noted that the National Planning Policy for Waste (October 2014) seeks the need for closer working between Local Planning Authorities and Waste Planning Authorities. This is required to integrate the need for waste management with other spatial concerns in the preparation of Local Plans.

Policy Background 4

Planning Practice Guidance

4.10 The Government released Planning Practice Guidance (PPG) (March 2014) to inform the National Planning Policy Framework. Of relevance to employment areas the Guidance states that local authorities should:

- Consider their existing stock of land, identifying the demand for and supply of employment land and determine the likely business needs and future market requirements.
- Consider the locational and premises requirements of particular types of business.
- Consider projections and forecasts to help identify where sites have been developed for a specific economic use.
- Analyse supply and demand to identify whether there is a discrepancy between quantitative and qualitative supply and demand for employment sites.
- Take account of business cycles and make use of forecasts and surveys.
- Identify where gaps in local employment land provision exist by comparing the available stock of land with the requirements of the area.
- Ensure that when interpreting employment and output forecasts into land requirements that the four key relationships are quantified:
 - Standard Industrial Classification sectors to Use Classes;
 - Standard Industrial Classification sectors to type of property;
 - Employment to floorspace (employment density);
 - Floorspace to site area (plot ratio based on industry proxies).
- Ensure opportunities for land to be utilised for waste management are built into the preparatory work for Local plans, to the level appropriate to the local planning authorities planning responsibilities. Of relevance to this ELR it should be noted that as reviews of employment land are undertaken, it is important to build in the needs of waste management before releasing land for other development or when considering areas where major regeneration is proposed.

4.11 The PPG also expands upon Section 110 of the Localism Act which requires a Duty to Co-operate for all local planning authorities in England. As part of the Duty to Co-operate the City Council should consult its neighbouring local planning authorities on this document.

Regional and Sub-Regional Policy

4.12 As part of the Government's Localism agenda the Regional Development Agencies were abolished and replaced by Local Enterprise Partnerships (LEPs). Chelmsford lies within the South East LEP, which covers Essex, Southend, Thurrock, Kent, Medway and East Sussex. The vision of the South East LEP is to facilitate the region to become “the most enterprising economy in England”. As part of this process there are four key LEP priorities:

1. Accelerating Growth: Enterprise and Innovation
2. Creating Competitive Locations: Infrastructure and Property
3. Building a 21st Century Workforce
4. Enabling Housing Growth

4.13 The Economic Plan for Essex recognises Chelmsford as a principal urban area. Chelmsford is a focus for growth in the County with the planned construction of 16,000 new homes and 20,000 new jobs by 2025.

4 Policy Background

4.14 A package to support a major business park and housing development to the north of the City is planned. As part of this development there will also be railway track capacity enhancements to the north of Chelmsford with a new station being constructed.

4.15 The South East LEP has recently submitted its Growth Deal and Strategic Economic Plan to Government, which sets out a strategy for growth. According to the Plan the Essex economy supports 766,000 jobs, is home to over 73,500 businesses and contributes over £30bn per year to the UK economy.

4.16 The LEP identifies Chelmsford as acting as a regional centre within the Heart of Essex/Mid-Essex Growth corridor and having strong links with the London labour market, supporting substantial commuter flows to and from the capital.

Local Policy

Previous Employment Land Reviews

4.17 A previous Employment Land Review was undertaken, firstly in 2006 with an update in 2009.

Development Plan Documents

4.18 Chelmsford has a full suite of adopted development plan documents. The Core Strategy and Development Control Policies Development Plan Document was adopted in 2008 and the City Council has undertaken a Focused Review in 2013 in order to ensure it conformed with the National Planning Policy Framework. There is also the Chelmsford Town Centre Area Action Plan (2008), North Chelmsford Area Action Plan (2011) and the Site Allocations Document (2012) which cover the entire area under the jurisdiction of Chelmsford City Council.

4.19 The policies listed within Table I are relevant to employment and are contained within the Core Strategy and Development Control Policies Development Plan Document and the Focused Review.

Table I Core Strategy and Development Control Policies

Theme	Policies
Managing Growth	CPI - Securing Sustainable Development
Managing Growth	CP2 - The City-wide Spatial Strategy
Managing Growth	CP7 - Area Action Plans
Economic Prosperity	CP22 - Securing Economic Growth
Economic Prosperity	CP23 - Reinforcing the Regional Role of Chelmsford
Economic Prosperity	DC48 - Employment Areas
Economic Prosperity	DC49 - Range of Unit Sizes
Economic Prosperity	DC50 - Promotion of Employment Clusters
Economic Prosperity	DC51 - Location of Business Development

Policy Background 4

Theme	Policies
Economic Prosperity	DC52 - Industrial and Warehouse Development
Economic Prosperity	DC53 - Employment Uses within Rural Areas
Economic Prosperity	DC56 - Farm Diversification
Economic Prosperity	DC57 - Re-Use of Rural Buildings

Source: Chelmsford Core Strategy and Development Control Policies Development Plan Document

4 Policy Background

Corporate Objectives

4.20 The Council's Corporate Plan is a high level statement of intent setting out the ambition for Chelmsford City Council.

4.21 The plan recognises the challenges and opportunities the Council faces and sets out how it will achieve its ambitious vision for the City. To deliver the vision the Council adopted the following corporate priorities:

- Attracting investment and delivering infrastructure
- Facilitating suitable housing for local needs
- Providing high quality public spaces
- Promoting a more sustainable environment
- Promoting healthier and more active lives
- Enhancing participation in cultural activities

4.22 This Employment Land Review relates to the corporate policy of 'attracting investment and delivering infrastructure'. Chelmsford is the largest employment centre in Essex with around 84,300 jobs and 11,870 businesses. To accommodate the City's growing population, which is projected to grow to in the region of 180,000 by 2020, the City Council will:

- Support the growth of infrastructure
- Build new homes
- Create new transport links and new facilities
- Promote Chelmsford as a first-choice location for investment
- Create jobs for all age groups and sectors
- Support the local economy

Section 5 Methodology

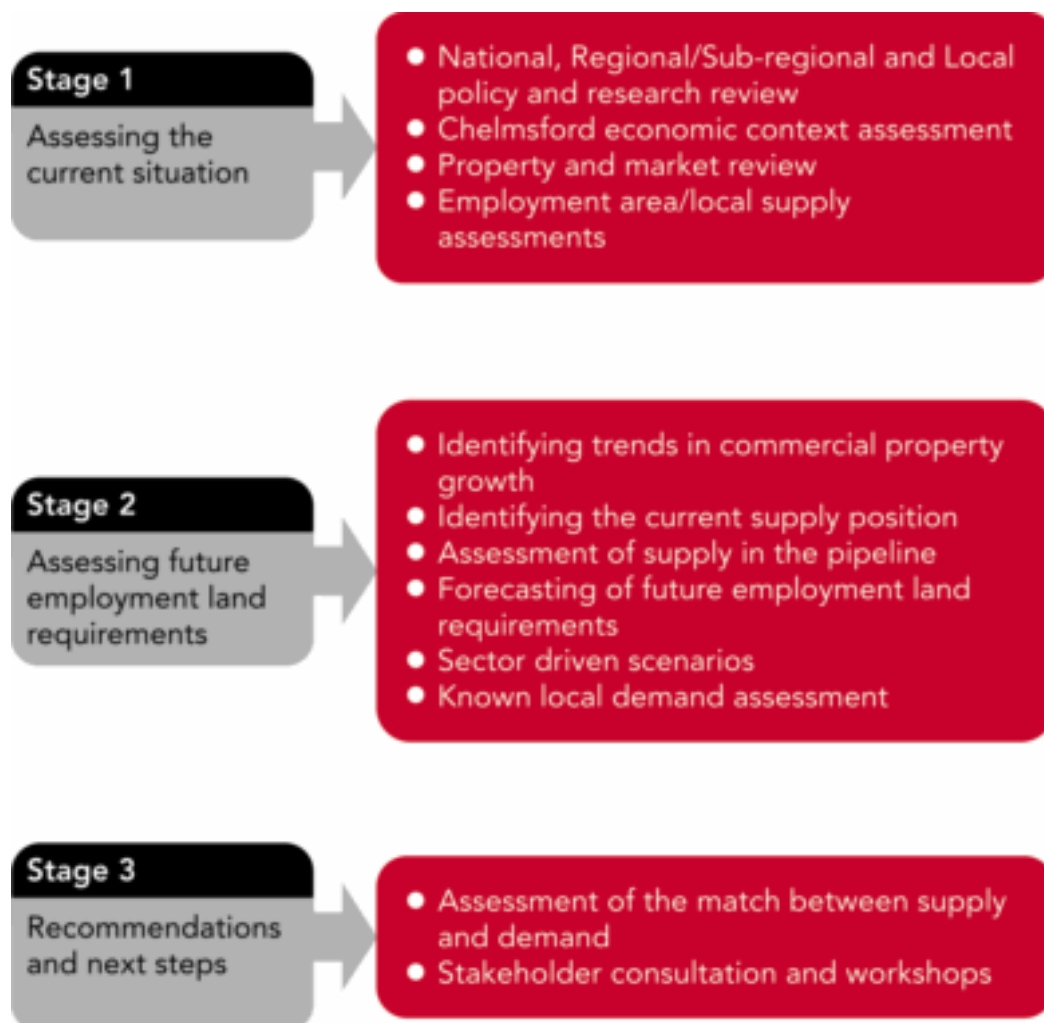
Introduction

5.1 The methodology used to carry out this Review conforms to the requirements of the National Planning Policy Framework (NPPF) and is compatible with the Government's Planning Practice Guidance (PPG) which stipulates the requirements of an Employment Land Review (ELR).

5.2 In addition to the PPG methodology, there is also project specific information contained in this section, with particular note of the methods used to calculate employment land loss and gain over time, land supply and demand.

5.3 The details of the assumptions made for calculating densities, and the sources of data used in the Review are set out. There is also an explanation on how the site appraisals have informed the Review conclusions.

Picture 1 Employment Land Review Methodology



Source: Chelmsford City Council (2014)

5 Methodology

Stage 1 - Assessing the Current Situation

5.4 The first stage of the Employment Land Review process identifies and reviews the planning policies of relevance to the Review. This review process is necessary to inform the methodology used for the ELR. This can be found at Section 4 of this document.

5.5 In order to inform an assessment of the current situation a review of the Chelmsford economy has also been undertaken. This is used to identify any trends that are occurring within Chelmsford's administrative area. This can be found at Section 6 of this document.

5.6 A summary of the planning history of existing Employment Areas can be found at Section 7. This covers allocated Employment Areas and non-designated areas within Chelmsford's administrative area. These two assessments identify changes in employment floorspace over the period of 2003-2013.

5.7 A separate summary of Chelmsford City Centre has been carried out. This considers the current supply and distribution of employment floorspace across the City Centre.

Stage 2 - Assessing Future Employment Land Requirements

5.8 This stage considers the evidence collated in Stage 1 and identifies trends within the commercial sector, alongside the current supply position within Chelmsford's administrative area. An assessment of any known future supply was undertaken, based on planning applications, new business parks that have extant planning permissions and current employment allocations in adopted plans.

5.9 From using the latest information available, from the East of England Forecasting Model, a number of baseline forecasts are used to identify the effects of different growth scenarios in Chelmsford. These assist in identifying future demand for employment space. Forecasts used are based on the statistics available, which cover the period 2013-2031.

Stage 3 - Recommendations and Next Steps

5.10 Stage 3 of this Review is a supply versus demand analysis. This considers how effectively the different growth scenarios identified in Stage 2 may be accommodated in Chelmsford's administrative area, based on the current and future supply of employment land identified in Stages 1 and 2. It is broken down to cover a number of different types of employment including industrial, warehousing, retail, leisure and office development.

5.11 The final part of this Review is to undertake stakeholder consultations and workshops. As part of the Duty to Co-operate the City Council will consult neighbouring authorities. Consultation will also be undertaken with the business community to ensure that the Review reflects the economic situation in Chelmsford's administrative area.

Use Classes Order

5.12 This Study is primarily concerned with Class B uses, as set out in the Use Classes Order. These are defined as follows:

- **B1 Business** - Offices (other than those that fall within A2), research and development of products and processes, light industry appropriate in a residential area.
- **B2 General industrial** - Use for industrial process other than one falling within class B1 (excluding incineration purposes, chemical treatment or landfill or hazardous waste).
- **B8 Storage or distribution** - This class includes open air storage.

5.13 It is however acknowledged that Class A, Class D and sui generis uses also contribute to the employment totals in the Review. The Use Classes Order covering these other uses can be found in Appendix 5.

Data Collection

5.14 The collection of data used to inform this Study commenced in September 2013, and has come from the following sources:

- ONS - Office for National Statistics
- VOA - The Valuation Office Agency
- 2001 and 2011 Censuses
- NOMIS - A web-based database of labour market statistics
- EGi - Estates Gazette Interactive
- Focus - A national commercial property database
- Chelmsford City Council's own Planning and Economic Development records.

5.15 Where data has been used from the 2001 Census this is owing to the equivalent data sets from the 2011 Census having not yet been released.

Statistical Disclaimer

5.16 The figures contained within this Employment Land Review are based upon the best available sources. There may be some small discrepancies within the data due to the rounding of figures.

Next Steps

5.17 According to the Planning Practice Guidance, in order to best understand the current market in relation to economic and main town centre uses, the Council should liaise closely with the business community to understand their current and potential future requirements. To date, this Review has considered recent patterns of employment land supply and loss, the existing stock of employment land, and identified any oversupply or evidence of market failure.

5.18 To ensure compliance with the Planning Practice Guidance, this document will be published for consultation so that the views of the local business community, neighbouring authorities, developers and local commercial property agents are fully understood. This will then enable further work to ensure the following requirements of the PPG are met:

- Market intelligence (from local data and discussions with developers and property agents, recent surveys of business needs or engagement with business and economic forums).
- Market signals, such as levels and changes in rental values, and differentials between land values in different uses.
- Public information on employment land and premises.
- Infrastructure constraints.
- The locational and premises requirements of particular types of business.

6 The Chelmsford Economic Context

Section 6 The Chelmsford Economic Context

Introduction

6.1 This section provides an overview of the size and nature of the Chelmsford economy through an analysis of the local economy, as well as characteristics of the local population and labour market. It has been informed by the Heart of Essex Economic Futures Study carried out by Nathaniel Lichfield and Partners (June 2012) as this is the most up to date data available, and the Nomis Labour Market Profile for Chelmsford (a web based labour market statistics database, accessed March 2014). The Heart of Essex sub-region comprises the districts of Chelmsford, Brentwood and Maldon.

Geography

6.2 Chelmsford is situated in the centre of Essex, covering an area of 133 sq miles (344 sq km) and supporting a population of circa 169,300⁽¹⁾. The two main settlements are Chelmsford, the county town of Essex (granted City status in 2012) and the town of South Woodham Ferrers in the south east. Beyond these centres the area is characterised by a number of villages surrounded by open countryside.

6.3 The City's administrative area lies to the north east of London and is bordered by seven neighbouring districts, Basildon, Braintree, Brentwood, Epping Forest, Maldon, Rochford and Uttlesford.

6.4 Chelmsford is connected by a number of rail links, with frequent services operating between Chelmsford, London Liverpool Street, Ipswich and Norwich. There are several primary road routes within Chelmsford including the A12 linking with London and the M25. The A12 also offers direct links into East Anglia.

Output

6.5 Chelmsford has been a major driver of growth within the Heart of Essex sub-region. The bid for City status outlined 10 key credentials of Chelmsford, including its role as the administrative capital of Essex and being home to the busiest railway station in the East of England with some 7.5 million passenger trips per year. Although the City title does not equate to any specific additional funding or powers, it has certainly raised the area's profile and could provide a further boost to inward investment.

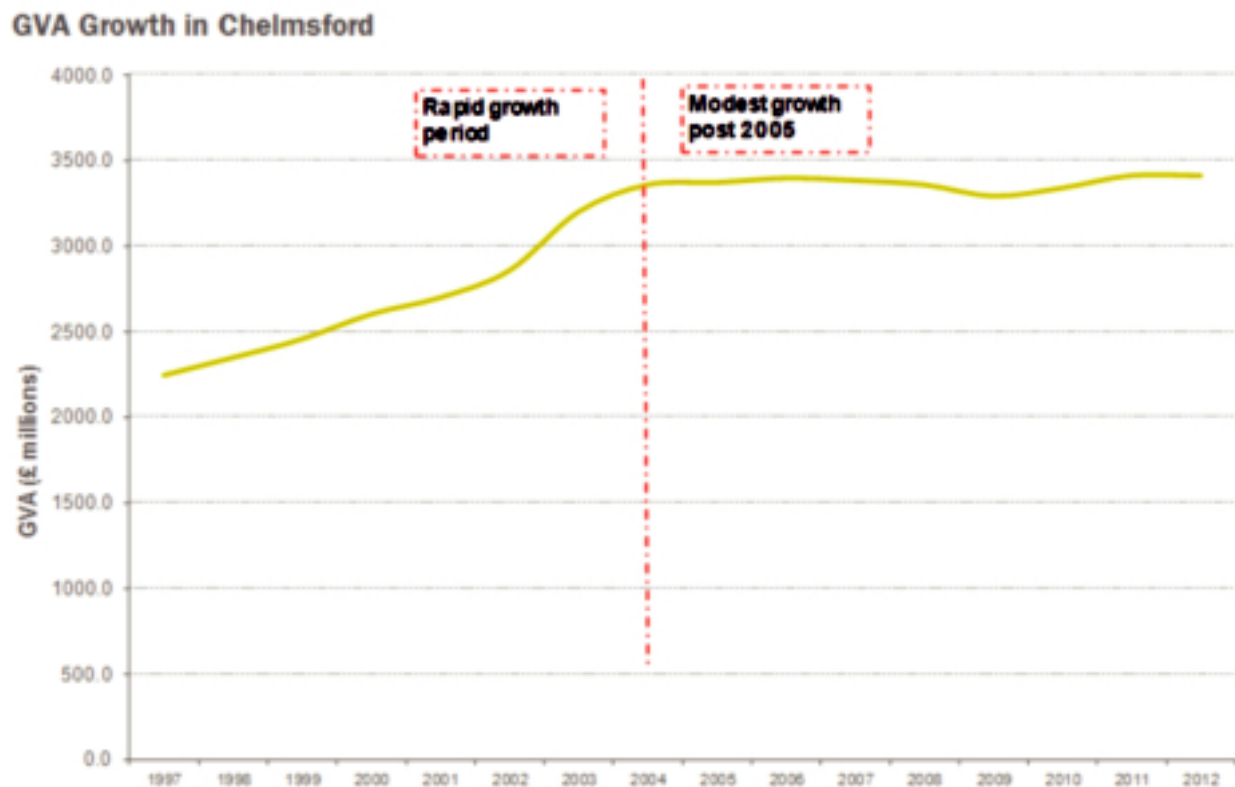
6.6 Chelmsford has the largest economy in the Heart of Essex and contributed £3.4 billion to the UK economy in 2011 (around 60% of the total Heart of Essex contribution).⁽²⁾ Figure 1 shows that between 1998 and 2004 the economy grew year on year by 5.4%, this was well above the growth rate in both Brentwood and Maldon (around 4% year on year). Growth slowed to a more modest 0.2% year on year during the latter part of the decade.

1 Office for National Statistics mid-year population estimates

2 Nathaniel Lichfield & Partners (2012) The Heart of Essex Economic Futures Study

The Chelmsford Economic Context 6

Figure 1 Gross Value Added (GVA) growth in Chelmsford



Source: Heart of Essex Economic Futures Study (2012)

6.7 Economic productivity in Chelmsford is in line with the UK average. Relative to other local authorities the economy of Chelmsford is larger than the national median and the employment base is also larger. However, Gross Value Added (GVA) per head is average and gross weekly earnings are also in line with the UK average. The East of England Forecasting Model indicates that GVA per Capita (i.e. per head of the resident population) will increase from £21,600 to £32,400 between 2013 - 2031, one of the fastest economic growth rates in Essex.

Employment

6.8 91,500 Chelmsford residents were employed in 2013⁽³⁾ and this has been relatively stable, maintaining a similar level since 2009. In 2012, the total number of jobs in Chelmsford stood at 84,300.⁽⁴⁾

6.9 The strength of Chelmsford's economy lies in its breadth of sectors, it is not over-dependent on one or two major employers or sectors, but rather supports a balanced economy across a variety of sectors and job types.

3 Nomis Labour Market Profile for Chelmsford (accessed 22/04/14)

4 Business Register Employment Survey 2012

6 The Chelmsford Economic Context

6.10 The Heart of Essex sub-region, as a whole, has above average employment within the public sector and Chelmsford in particular has 36.5% of jobs within education, health and public administration, in comparison with 26.0% in the East of England and 28.1% in Great Britain. This figure is higher than Brentwood and Maldon (22.1% and 25.2% respectively). The Anglia Ruskin University, alongside other academic institutions, is a major employer.⁽⁵⁾

6.11 The service sector and particularly financial and other business services are key sectors within Chelmsford, with 18.9% per cent of jobs.⁽⁶⁾

6.12 Retail is also a significant sector – with 15.2% of jobs in the wholesale and retail sector, including motor trades.⁽⁷⁾

6.13 The construction sector, although experiencing sharp declines between 2008 and 2010, remains significant in Chelmsford and employment is proportionally higher in Chelmsford (4.8%) than the average in Great Britain (4.5%).⁽⁸⁾

Business Base

6.14 Chelmsford has the largest business base within the Heart of Essex. According to Experian data there are 11,870 businesses in the Chelmsford area. This is significantly higher than the 7,910⁽⁹⁾ recorded by the Office for National Statistics (ONS), and is likely to relate to the fact that Experian's data has a more in-depth view of non-limited businesses, sole-traders and partnerships, many of whom fall below the minimum VAT threshold (£73,000 taxable turnover per year) and as such do not appear on official registers.⁽¹⁰⁾ In line with the East of England and UK average, over two thirds of these firms have between 0 and 4 employees and it is likely that this figure is an under-estimate, given the total number of businesses identified above.

6.15 The latest Census data shows that the percentage of those who work mainly at or from home has increased from 8.94% in 2001 to 10.25% in 2011.

6.16 Business base growth analysis looks at average annual change in the business base (i.e. overall churn in total numbers of businesses taking into account insolvencies, dissolutions, relocations, and in the case of sole traders/partnerships those that appear to cease trading). As part of the Heart of Essex Economic Futures Study (2012) the resilience of the local authority's businesses within the context of ongoing economic uncertainty was examined. This demonstrated that Chelmsford's business base had experienced an average annual decline of 1.2 per cent from 2001 to 2011.⁽¹¹⁾

6.17 The Heart of Essex Economic Futures Study assessed the health of the business base (Table 2). This demonstrated that whilst Chelmsford had the highest business start-up rate in the Heart of Essex the number of businesses that had become insolvent was above the level of both Brentwood and Maldon (it is however in line with the England average). The adaptive capacity of businesses (their ability to withstand shocks and maintain resilience) was also below the England average of

5 Nomis Labour Market Profile for Chelmsford (accessed 22/04/14)

6 Nomis Labour Market Profile for Chelmsford (accessed 22/04/14)

7 ibid

8 ibid

9 Business Register Employment Survey 2013

10 Nathaniel Lichfield & Partners (2012) The Heart of Essex Economic Futures Study

11 ibid

The Chelmsford Economic Context 6

57.1% which may provide some indication as to the recent decline in the business base. StartUp Britain released data which put Chelmsford 21st in a list of entrepreneurial hotspots in Britain, with 5,689 start-ups recorded in the Chelmsford area in 2013.

Table 2 Chelmsford Business Health

	Brentwood	Chelmsford	Maldon	England
Business start-ups since 2010 - 2012	19.8%	20.5%	17.9%	19.8%
Business insolvencies since 2010 - 2012	0.8%	1.1%	0.9%	1.1%
% of businesses with adaptive capacity	47.8%	51.6%	55.7%	57.1%

Source: Heart of Essex Economic Futures Study (2012)

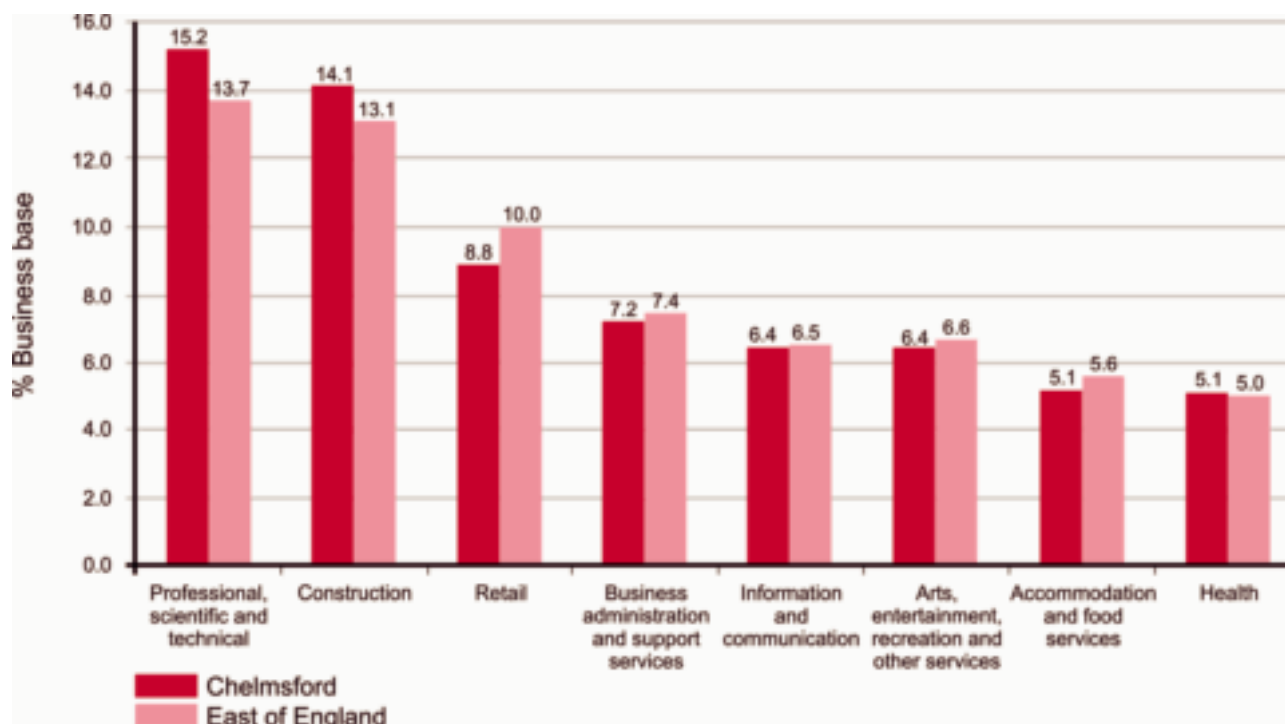
6.18 The largest two sectors, professional scientific and technical, followed closely by the construction sector comprise almost 30% of the total business base in Chelmsford (Figure 3). Both sectors make up a larger proportion of the business base than they do across the East of England. The number of businesses in both sectors has however declined year on year by up to 0.5% and, particularly for the professional scientific and technical sector, this is a bigger decline than seen elsewhere in the Heart of Essex and the region.

6.19 Other key sectors include retail, business administration and support services, information and communication, arts entertainment and recreation services - together these industries comprise a further 30% of the total business base. All did however experience declines between 2009 and 2011, with the most significant being in business administration and support services with a loss of 2.2% year on year.

6.20 A number of high profile manufacturing and research and development businesses are also located within the area including e2v, BAE Systems and Visteon.

6 The Chelmsford Economic Context

Figure 2 Chelmsford Business Composition



Source: Heart of Essex Economic Futures Study (2012)

6.21 Health was also recorded as a relatively large sector, at 5.1% of the total business base, and saw a year on year growth of 10.4% between 2009 and 2011.

6.22 The Heart of Essex Economic Futures Study demonstrated that businesses within Chelmsford perceived their area as a good location for investment. The Essex Business Survey interviewed 244 businesses within the local authority area and 77% of respondents highlighted that they were satisfied with their businesses location as a place for investment (this was the highest within Essex). Mobile phone coverage, high speed broadband and the road network were identified as key issues for business operation.⁽¹²⁾

Labour Market

6.23 Chelmsford's resident population is well educated and highly skilled. Almost a third of the working age population (108,000) are qualified to degree level (NVQ 4) or above, higher than Essex but slightly lower than the region.⁽¹³⁾ This translates into a high proportion (46.5%) of the workforce engaged in higher skilled professional occupations.⁽¹⁴⁾

6.24 Conversely, Chelmsford has a relatively low proportion of workers with no qualifications at 5.5% compared to a national average of 9.7%. Whilst on the surface this indicator appears positive, baseline research undertaken to inform Chelmsford's Local Development Framework warns that this skills profile could lead to a deficiency in people prepared to perform unskilled jobs. 1.9% of Chelmsford's working age population claims Job Seekers Allowance (February 2014). This is below both regional (2.3%) and national (3.0%) averages.⁽¹⁵⁾

12 Bmg Research (April 2010) Essex Business Survey – Heart of Essex Sub-region

13 Nomis Labour Market Profile for Chelmsford (accessed 22/04/14)

14 Nathaniel Lichfield & Partners (2012) The Heart of Essex Economic Futures Study

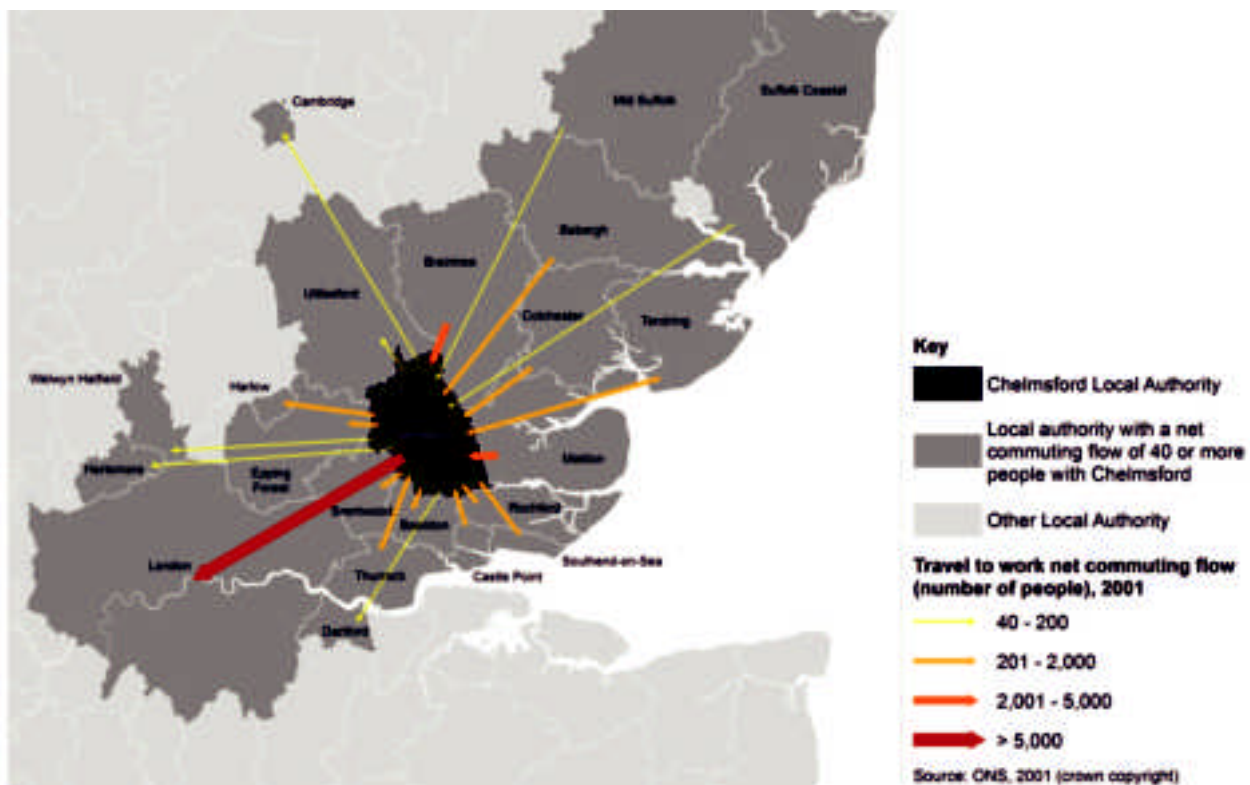
15 Nomis Labour Market Profile for Chelmsford (accessed 22/04/14)

The Chelmsford Economic Context 6

6.25 Whilst average resident earnings in Chelmsford exceed the regional and national average by 8% and 13% respectively⁽¹⁶⁾, evidence presented within the Council's LDF Topic Paper on Economy and Employment (2007) suggests that approximately 40% of its resident workforce – many with high skills – commute out of Chelmsford (largely to London) for employment better suited to their skills. Chelmsford also experiences net out-commuting to employment centres to the west of Chelmsford such as Harlow, Epping Forest, Brentwood and Basildon, at the same time as attracting commuters from elsewhere in East Essex and Suffolk (Figure 3). The Annual Population Survey commuter flows 2011 suggests that the highest level of outward commuting is to Greater London (16,302 of Chelmsford residents), and the highest proportion of people living elsewhere and commuting into Chelmsford live in Braintree (8,834).

6.26 Meanwhile, employees who work in Chelmsford earn on average 13% less per week than the average resident populations weekly earnings at £520, primarily due to the impact of London.⁽¹⁷⁾ This suggests that there is a lack of higher-level jobs available in Chelmsford and this is exacerbating the wage gap between Chelmsford residents and the Chelmsford workforce.⁽¹⁸⁾

Figure 3 Net commuting flows to/from Chelmsford



Source: Heart of Essex Economic Futures Study (2012)

16 Nomis Labour Market Profile for Chelmsford (accessed 22/04/14)

17 ibid

18 Nathaniel Lichfield & Partners (2012) The Heart of Essex Economic Futures Study

7 Review of Changes to Existing Employment Land

Section 7 Review of Changes to Existing Employment Land

Introduction

7.1 This section focuses on the potential change of use, gain and loss of employment floorspace over the ten year period 2003-2013. It has been broken down into two sections; the designated employment areas, and non-allocated employment land supply (to cover rural and all other employment in the parishes and South Woodham Ferrers). Data for existing City Centre floorspace has also been collected for the period 2000-2012. This 2000-2012 timeframe was used as it was the period which was available from the Valuation Office Agency (VOA).

Key Findings

7.2 The data presented in this section is drawn from Chelmsford City Council's planning records, unless otherwise stated. Within the Employment Areas, non-allocated areas and Chelmsford City Centre the data demonstrates trends in potential gains and losses of employment floorspace as the result of planning permissions granted. This data has been supported by additional data sourced from the VOA, which illustrates trends in business floorspace and the number of business units. The key findings are summarised below:

Employment Areas

- 21,883m² of B1 floorspace has been granted planning permission over the study period across the 29 Employment Areas.
- 140,016m² of Class B (B1, B2, B8 or a flexible Class B use) floorspace has been granted planning permission.
- 118,890m² of Class B (B1, B2, B8 or a flexible Class B use) floorspace potential gain (net).
- 8,740m² of B1 floorspace potential loss.
- Nine of the designated Employment Areas have seen a potential net loss of Class B floorspace totalling 13,538m².

Non-allocated

- 24,481m² of B1 floorspace has been granted planning permission over the study period across the 27 parishes and South Woodham Ferrers Town Centre.
- 117,211m² of Class B (B1, B2, B8 or a flexible Class B use) floorspace has been granted planning permission.
- 95,656m² of Class B (B1, B2, B8 or a flexible Class B use) floorspace potential gain (net).
- 10,420m² of B1 floorspace potential loss.
- Three of the parishes have seen a potential net loss of Class B floorspace totalling 2,919m².

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Chelmsford City Centre

- 256,648m² of Class A, B and D floorspace across the 10 sub-areas analysed as part of Chelmsford City Centre (VOA).
- 115,204m² of B1 floorspace (VOA).
- 184,779m² of retail and commercial floorspace (GOAD).
- The New Street sub-area has the highest percentage of B1 floorspace as part of its total, consisting of 94% of the 13,604m² sub-area total (VOA).

Chelmsford Overall Picture

7.3 This section shows the overall picture for the whole of the Chelmsford administrative area over the period of 2000-2012. This is the most recent data available from VOA. The data in Table 3 shows the number of business units and floorspace (m²) to supplement the data gathered in the rest of this section. This data is also used to show trends in commercial property growth in Table 8.

7.4 According to the VOA the legal definition of a unit is one of domestic property that is, or may become, liable to national non-domestic rates and therefore appears on the rating lists. This differs from the definition of units with regard to planning and business units and explains the discrepancy in the figures set out at paragraph 7.2.

Table 3 Business Floorspace Statistics and Percentage Increase (2000-2012) - Units (U) & Floorspace m² (F) (Thousands)

	Retail		Offices		Industrial		Other		Total	
	U	F (m ²)	U	F (m ²)	U	F (m ²)	U	F (m ²)	U	F (m ²)
2000	1,130	326	660	239	1,180	655	320	83	3,290	1,303
2004	1,140	334	690	253	1,210	682	350	88	3,390	1,357
2008	1,180	350	790	279	1,320	665	380	120	3,670	1,414
2012	1,210	360	970	285	1,350	673	390	127	3,920	1,445
% Increase	7	10	47	19	14	3	22	53	19	11

Source: Valuation Office Agency (2012)

7.5 The total number of units has grown from 3,290 to 3,920 between 2000 and 2012, giving an increase of 19%. The highest growth is in terms of new offices, with an increase of 47%, with the number of new retail units increasing by the smallest amount at 7%.

7 Review of Changes to Existing Employment Land

7.6 Total floorspace across the Chelmsford administrative area has increased from 1,303,000 to 1,445,000 m², which equates to an 11% increase. Other uses have increased by 35%, and Class B8 and Class D floorspace figures have seen the highest increase.

Analysis of Existing Employment Areas

Methodology

7.7 To provide a more detailed picture of the employment sectors in Chelmsford and its administrative area, potential floorspace changes in all the allocated employment areas have been considered. A total of 29 allocated sites are identified and mapped from the Site Allocations Document (SAD), the North Chelmsford Area Action Plan (NCAAP) and the Chelmsford Town Centre Area Action Plan (CTCAAP). These are set out in Appendix 1.

7.8 The planning history has been collated for each allocated employment site. For the purposes of this part of the Review a ten year period of 2003-2013 has been used. This provides an analysis of the potential gains and losses in employment space during that period.

7.9 The planning applications which were considered as part of this Review fall within the following Use Classes:

- B1 Business
- B2 General Industrial
- B8 Storage or distribution
- Flexible floorspace (B1/B2/B8)

7.10 The floorspace of any planning application that resulted in a potential loss or potential gain of any of these Use Classes is recorded in Appendix 2. Any notable changes within each employment area are also identified.

7.11 The data presented in this section is based on the potential gains and losses of floorspace through planning permissions granted. The figures are calculated on the assumption that all planning permissions are implemented which is why these figures are considered as potential losses and gains. It should be noted that not all permissions may have been implemented, and there may also be changes which have been carried out without the benefit of planning permission. It is however considered that this is the best available information to gain an insight into any changes within Chelmsford.

Findings

7.12 The findings of this analysis are set out in Table 4 below. The data shows that between 2003 - 2013 a total of 140,016m² of new employment floorspace was granted planning permission, while 21,126m² of existing employment floorspace was lost to non-employment uses. This amounts to an overall net gain of 118,890m² of employment floorspace.

Review of Changes to Existing Employment Land 7

Table 4 Key Employment Area Analysis

Use Class	Potential gain through planning permission (m ²)	Potential loss through planning permission (m ²)	Potential net gain/loss through planning permission (m ²)
B1 Business	21,883	8,740	13,143
B2 General Industrial	1,173	2,049	-876
B8 Storage or distribution	27,470	3,779	23,691
Flexible Use B1/B2/B8	89,490	6,558	82,932
Total	140,016	21,126	118,890

Source: Chelmsford City Council (2013)

7.13 The most notable potential floorspace gains were seen at Temple Farm, Chelmsford and Springfield Business Parks. In the case of Temple Farm this is a planning permission for a 69,296m² flexible Class B development, Chelmsford Business Park is for B1 office development, and Springfield Business Park the construction of 13,780m² of flexible Class B floorspace.

7.14 Nine of the Employment Areas have seen a potential net loss of employment space over the review period, which totals 13,538m². The total potential losses across all 29 Employment Areas is set out in Table 4 above.







7.15 The Employment Areas with the highest potential net loss of Class B floorspace are Dukes Park, New London Road and Church Street. In the case of Dukes Park this has been lost to Class D uses, New London Road has been primarily lost to Class C uses, with D Use Classes also contributing to the potential loss of employment space, and in Church Street the potential loss has been attributed to Class C uses.

7.16 There has not been any significant planning change in Eastwood House and Coval Wells Employment Areas over the review period.

7.17 Figures 6 and 7 show the distribution of Employment Areas across Chelmsford's administrative area. Figure 5 provides an explanation on how to interpret the key and notations on Figures 6, 7 and 8. It should be noted that there are only 28 Employment Areas plotted as, for the purposes of this Review, Hoffmanns Way and Kay-Metzeler have been included as one Employment Area.

7 Review of Changes to Existing Employment Land

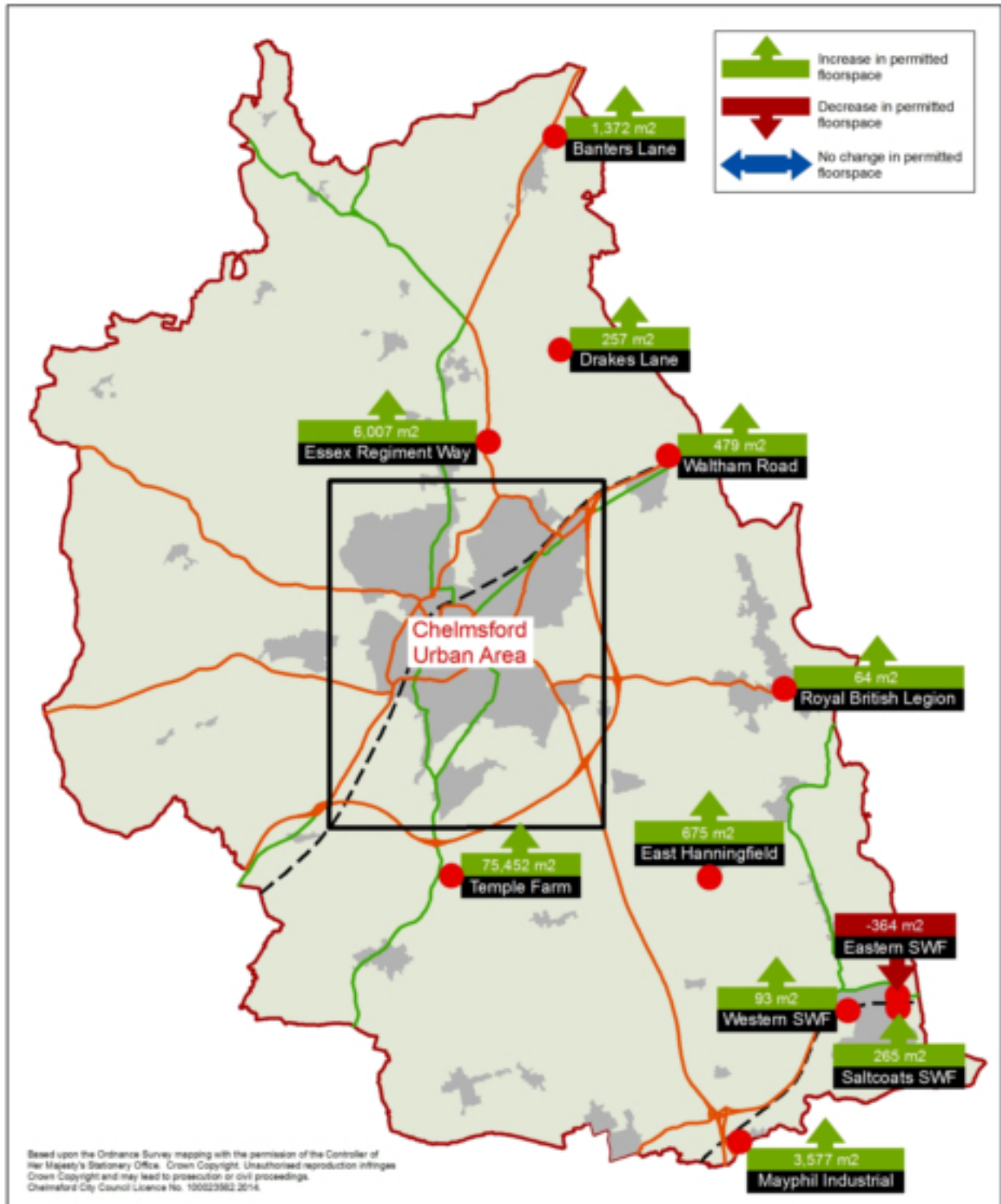
Figure 4 Explanation of Keys

Notation	Explanation
 Increase in floorspace	In areas where the amount of Class B floorspace has increased through either the granting of planning permission for development, or change of use over the period 2003 - 2013.
 Decrease in floorspace	In areas where the amount of Class B floorspace has decreased through change of use to other uses over the period 2003 - 2013.
 No change in floorspace	In areas where there has been no planning change that effects the amount of Class B floorspace over the period 2003 - 2013.
 Increase in floorspace	This Employment Area has seen an increase in size of 512 m2 over the period 2003 - 2013.
 Decrease in floorspace	This Employment Area has seen a decrease in size of 4,480 m2 over the period 2003 - 2013.
 No change in floorspace	This Employment Area's size has remained the same over the period 2003 - 2013.

Source: Chelmsford City Council (2014)

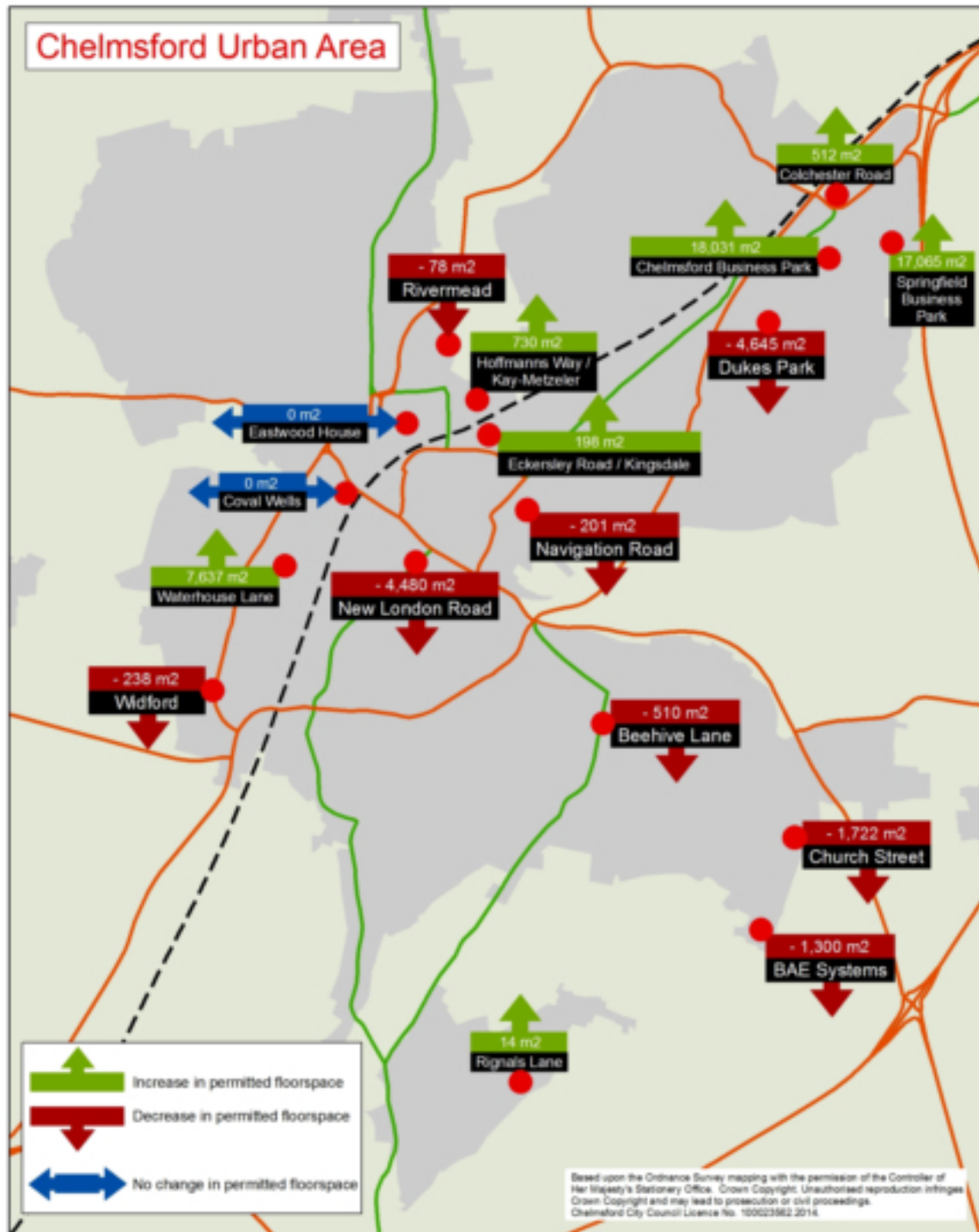
Review of Changes to Existing Employment Land 7

Figure 5 Changes in Employment Floorspace 2003-2013 across the allocated Employment Areas



7 Review of Changes to Existing Employment Land

Figure 6 Changes in Employment Floorspace 2003-2013 across the allocated Employment Areas in the Chelmsford Urban Area



Review of Changes to Existing Employment Land 7

Wider Considerations

7.18 For each of the allocated Employment Areas the quality of the surrounding environment has been assessed. This assessment is set out in a matrix at Appendix 4. The matrix considers the following matters:

- Distance to Major Roads
- Distance to Major Rail
- Public Transport Access
- Site Accessibility
- Parking
- Conflicting or Bad Neighbour issues
- Condition of Buildings

7.19 Proximity to public transport and infrastructure have been identified as being important factors to ensure the viability of the Employment Areas. The analysis provides a picture of the wide range of employment across Chelmsford's administrative area.

Analysis of Non-Allocated Employment Land Supply

Methodology

7.20 An integral part of this Employment Land Review is focused on identifying the rural employment land supply. The review has examined planning permissions in all non-allocated employment land within the 27 parishes that fall within Chelmsford City Council's administrative area, and South Woodham Ferrers Town Centre. For the purposes of this section of the Review a ten year period of 2003-2013 has also been used. This provides an analysis of the potential gains and losses in employment floorspace during that period.

7.21 The planning applications which were considered as part of this review fall within the following Use Classes:

- B1 Business
- B2 General Industrial
- B8 Storage or distribution
- Flexible floorspace (B1/B2/B8)

7.22 The floorspace of any planning permission that resulted in a potential loss or potential gain of any of these Use Classes is illustrated in Figure 7.

7.23 The data presented in this section is based on the potential gains and losses of floorspace through planning permissions granted. The figures are calculated on the assumption that all planning permissions are implemented which is why these figures are considered as potential losses and gains. It should be noted that not all permissions may have been implemented, and there may also be changes which have been carried out without the benefit of planning permission. It is however the best available information to gain an insight into any changes within Chelmsford.

7.24 To avoid double counting, any planning permission within an allocated Employment Area has not been included in this analysis.

7 Review of Changes to Existing Employment Land

7.25 An important part of rural employment land supply is now within a number of converted farms and farmyards as a result of changes in farming practices and diversification. A number of these are well established and may not have undergone any planning change in the period 2003-2013. However, to ensure such sites are identified details of these additional sites can also be found within this section of the Review.

7.26 To gain an insight into the likely number of businesses based outside the allocated Employment Areas, the Local Land and Property Gazetteer has been analysed, and the results recorded. This contains data on all registered commercial property. From this it has been possible to ascertain how many commercial businesses, and their respective floorspaces, are registered within each Parish and the remaining non-parished areas of Chelmsford which are not included within any allocated Employment Area or Chelmsford City Centre. It should be noted that this data was recorded in January 2014 and shows overall totals of floorspace at that point in time.

Planning Permission Changes - 2003 to 2013

7.27 The findings of this analysis are set out in Table 5 below and illustrated in Figure 7. The data shows that between 2003 - 2013 a total of 117,211m² of new employment floorspace was granted planning permission, while 21,555 m² of existing employment floorspace was lost to non employment uses. This amounts to an overall net gain of 95,656m² of employment floorspace.

Table 5 Key Non-allocated site Analysis

Use Class	Potential gain through planning permission (m ²)	Potential loss through planning permission (m ²)	Potential net gain/loss through planning permission (m ²)
B1 Business	24,481	10,420	14,061
B2 General Industrial	6,403	7,784	-1,381
B8 Storage or distribution	51,705	2,803	48,902
Flexible Use B1/B2/B8	34,622	548	34,074
Total	117,211	21,555	95,656

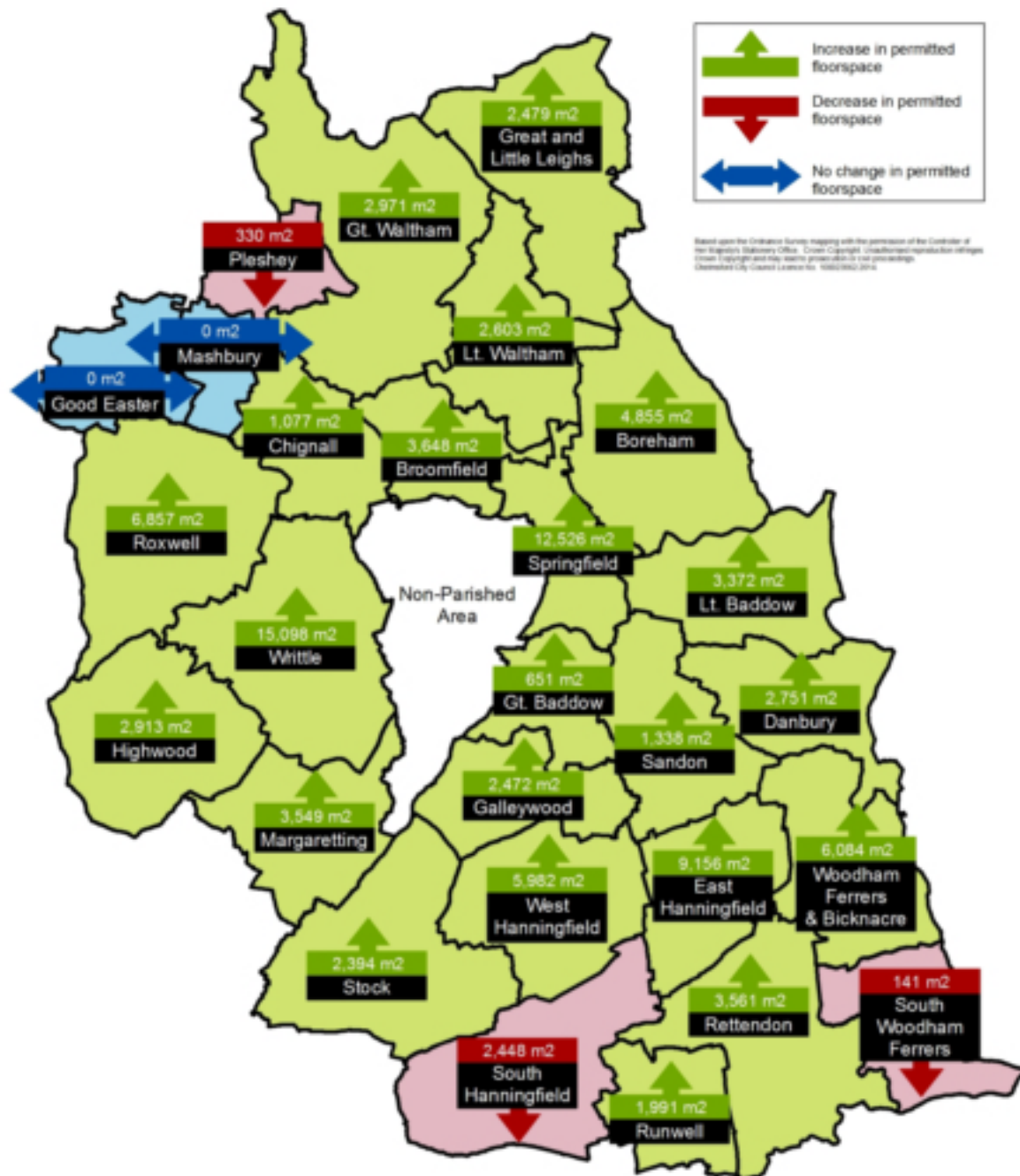
Source: Chelmsford City Council (2013)

7.28 As set out in Figure 7, the parishes with the most notable potential floorspace gains are Writtle, Springfield and East Hanningfield. In the case of Writtle this is largely due to a trend in using farm buildings and yards for B1 office and B8 storage uses, Springfield is for B1 office development and land being used for B8 storage, and in East Hanningfield this is due to a trend towards using farm buildings for B8 storage.

7.29 The parishes with the highest potential net loss of Class B floorspace are South Hanningfield, Pleshey and South Woodham Ferrers. In the case of South Hanningfield and Pleshey this has been to Class C uses, and in South Woodham Ferrers to both Class C and Class D uses. There has not been any significant planning change in Good Easter and Mashbury Parishes over the study period.

Review of Changes to Existing Employment Land 7

Figure 7 Changes in Employment Floorspace 2003-2013 across the non-allocated Areas



7 Review of Changes to Existing Employment Land

Rural Employment Sites

7.30 The list below highlights the distribution of further non-allocated rural business sites across the City's administrative area, some of which may not have undergone any changes over the last ten years, but which are sizeable or well established sources of employment known to the City Council. It should be noted that this list is not exhaustive but highlights the larger sources of rural employment.

7.31 These sites generally comprise of converted agricultural buildings which are used for a range of Class B Uses. A full site description, details of location, and aerial photograph of each site can be found at Appendix 6.

Ash Tree Farm, Roxwell Road, Boyton Cross

Boyton Hall Farm, Boyton Hall Lane, Chelmsford

Brock Farm, Ingatestone Road, Stock

Little Boyton Hall Farm, Boyton Hall Lane, Chelmsford

Muggeridge Farm, Maltings Road, Battlesbridge

Old Park Farm, Main Road, Ford End

Phillows Farm, Hammonds Road, Little Baddow

Rawlings Farm, Main Road, Chelmsford

Reeds Farm, Cow Watering Lane, Chelmsford

Runwell Hall Farm, Hoe Lane, Rettendon Common

Warner's Farm, Main Road, Great Waltham

Warren Estate, Lordship Road, Writtle

Whitbreads Farm, Whitbreads Farm Lane, Chatham Green

White House Farm, Main Road, Rettendon Common

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Analysis of the Local Land and Property Gazetteer

7.32 The analysis of the Local Land and Property Gazetteer is set out below in Table 6.

Table 6 Non-allocated floorspace Analysis

Parish	Number of Companies	Total Floorspace (m ²)	Employment Areas (m ²)	Total Floorspace outside Employment Areas (m ²)
Bicknacre & Woodham Ferrers	38	9,059	Nil	9,059
Boreham*	100	26,971	4,018	22,953
Broomfield	67	54,647	Nil	54,647
Chignall	7	1,498	Nil	1,498
Danbury	132	21,700	769	20,931
East Hanningfield	71	20,057	5,207	14,850
Galleywood	148	32,668	5,227	27,441
Good Easter	6	1,164	Nil	1,164
Great & Little Leighs	50	10,762	2,912	7,850
Great Baddow	262	50,049	12,862	37,187
Great Waltham	52	7,504	Nil	7,504
Highwood	39	3,848	Nil	3,848
Little Baddow	16	1,884	Nil	1,884
Little Waltham	73	16,161	8,259	7,902
Margaretting	31	9,036	Nil	9,036
Mashbury	4	898	Nil	898
Pleshey	18	1,961	Nil	1,961
Rettendon	183	27,176	5,555	21,621
Roxwell	43	5,961	Nil	5,961
Runwell	26	6,883	Nil	6,883
Sandon	27	12,397	Nil	12,397

7 Review of Changes to Existing Employment Land

South Hanningfield	93	18,043	Nil	18,043
South Woodham Ferrers	420	97,557	47,983	49,574
Springfield*	265	249,295	198,408	50,887
Stock	106	12,511	Nil	12,511
West Hanningfield	33	7,206	1,289	5,917
Writtle	215	49,730	Nil	49,730
Chelmsford (Non-parished area)	2,353	573, 657	185,030	388,627
Total	4,878	1,330,283	477,519	852,764

Source: Chelmsford City Council (2013)

* In cases where an employment area crosses a parish boundary, the site has been allocated within the parish where the majority of the site is located.

7.33 This shows that in January 2014 there were approximately 4,878 companies operating within the 27 Parishes, and the remaining non-parished areas of Chelmsford, which are not included within any allocated Employment Area or Chelmsford City Centre.

7.34 The areas with the highest number of businesses are the non-parished areas of Chelmsford, and the Parishes of South Woodham Ferrers, Springfield and Great Baddow. The areas with the highest amounts of floorspace in business use are the non-allocated areas of Chelmsford, and the Parishes of Broomfield, Springfield and Writtle. The Parishes with the lowest number of businesses and floorspace are Mashbury, Good Easter and Chignall. These figures only include commercial businesses and floorspace outside of any allocated Employment Areas.

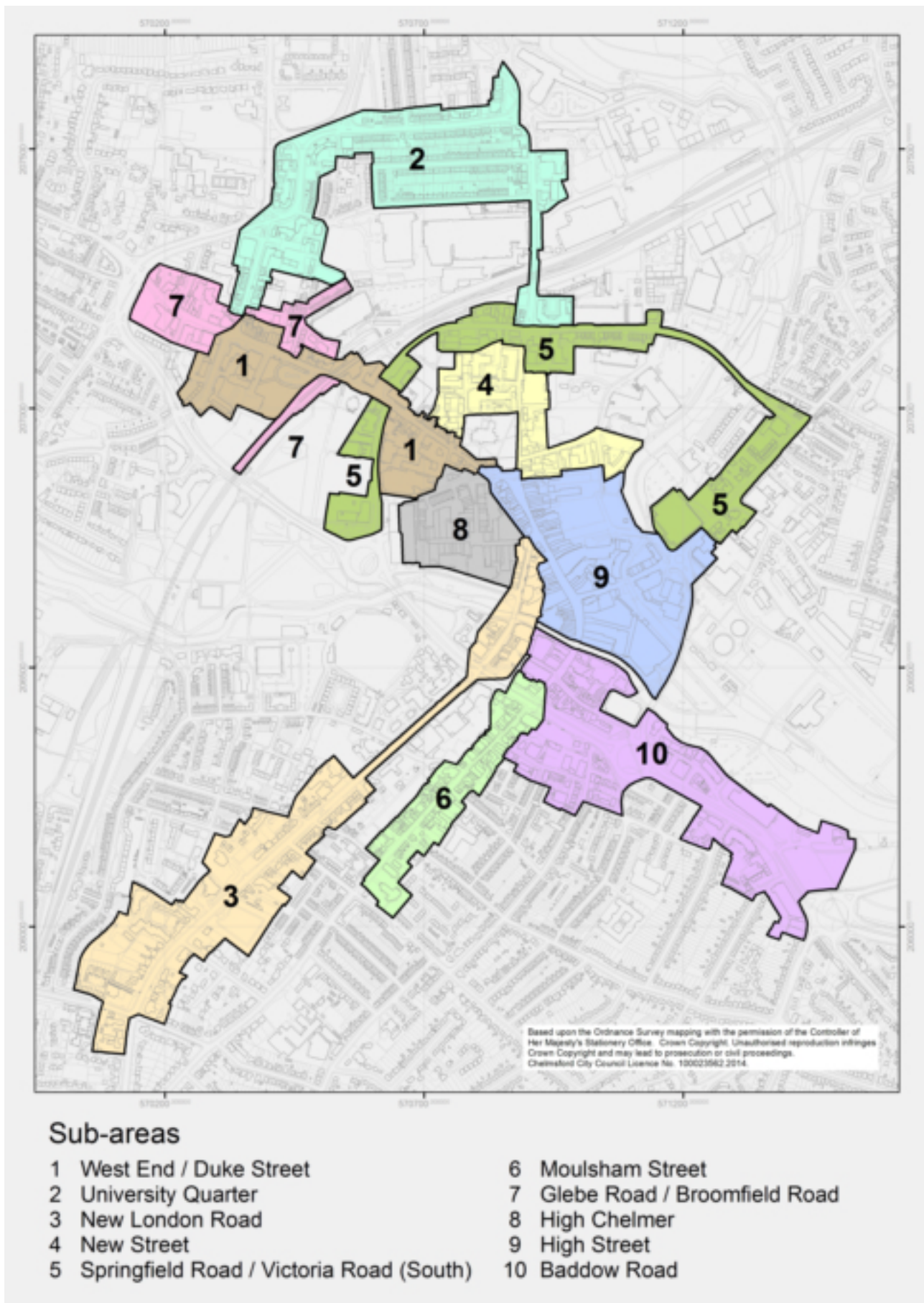
Analysis of Chelmsford City Centre

Methodology

7.35 This part of the review considers employment floorspace within Chelmsford City Centre area, which is defined by the Chelmsford Town Centre Area Action Plan. For the purposes of this analysis the area has been split geographically into ten sub-areas as shown in Figure 8. To avoid double counting the floorspace of any allocated Employment Areas have been removed from the areas identified below.

Review of Changes to Existing Employment Land 7

Figure 8 Chelmsford City Centre VOA Sub-areas



7 Review of Changes to Existing Employment Land

7.36 This Employment Land Review is primarily concerned with Class B uses; however, other Use Classes are included to assess any patterns or concentration of uses. Sui generis uses have not been included within this part of the Review but it is acknowledged that they are a further source of employment.

7.37 The floorspaces in this section have been calculated using data obtained from the Valuation Office Agency (VOA). Floorspace figures have been extracted from the VOA for all floors occupied in the following business Use Classes (a full list of Use Classes can be found at Appendix 5):

- A1 - Shops
- A2/A3/A4/A5 - Financial and professional services/Food and drink restaurants, snackbars and cafes/Drinking establishments, pubs and bars/Hot food takeaways
- B1 - Offices
- D1/D2 - Non-residential institutions/Assembly and leisure, cinemas, music and concert halls etc

Findings

7.38 Table 7 below sets out the findings for each of the Use Classes analysed. A1 uses made up the highest proportion of floorspace, amounting to 123,490m², or 48% of the total floorspace recorded in the City Centre, with B1 uses amounting to 115,205m², 45% of the total floorspace recorded. The other uses were negligible.

7.39 Of these figures the highest percentage of each Use Class was recorded in the following areas:

- A1 - High Chelmer, The High Street and Baddow Road.
- A2/A3/A4/A5 - Baddow Road, High Street and the University Quarter.
- B1 - New Street, West End/Duke Street and New London Road.
- D1/D2 - The University Quarter, New London Road and Baddow Road.

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Table 7 City Centre Analysis

VOA Sub-Area	A1 (m ²)	%	A2/A3/ A4/A5 (m ²)	%	B1 (m ²)	%	D1/D2 (m ²)	%	Area Total (m ²)
1) West End/Duke Street	5,098	9	1,123	2	47,913	88	532	1	54,666
2) University Quarter	4,212	34	729	6	6,062	48	1,518	12	12,521
3) New London Road	3,836	19	124	1	14,069	71	1,910	10	19,939
4) New Street	339	3	506	4	12,759	94	0	0	13,604
5) Springfield Road/Victoria Road (South)	7,763	35	98	0	14,525	65	52	0	22,437
6) Moulsham Street	6,949	51	524	4	6,034	45	0	0	13,507
7) Glebe Road/Broomfield Road	3,034	37	288	4	4,627	56	260	3	8,209
8) High Chelmer	25,905	86	1,006	3	3,070	10	0	0	29,981
9) High Street	52,161	84	5,662	9	3,764	6	160	0	61,747
10) Baddow Road	14,193	71	2,813	14	2,382	12	648	3	20,036
Total	123,490	48	12,873	5	115,205	45	5,080	2	256,648

Source: Valuation Office Agency (2013)

8 Review of Current and Future Employment Land Supply

Section 8 Review of Current and Future Employment Land Supply

Introduction

8.1 This section focuses on the current position in terms of land supply within Chelmsford. It presents a picture of the current stock of commercial premises and allocated employment land within the Local Development Framework for the period to 2021, and assesses the availability of this land at the current time. Geographically, it considers supply in the City Centre, north Chelmsford and other locations beyond these areas. It also sets out the volume of vacant existing commercial space that is currently on the market in Chelmsford and looks at forthcoming supply.

Trends in commercial property growth in Chelmsford

8.2 Chelmsford has a relatively healthy commercial property market. Comparative data from the Valuation Office Agency for 2000 and 2012 (set out in Table 3) indicates that in all sectors (retail, offices and industrial) Chelmsford has seen growth in both the numbers of units and the amount of floorspace in use. This data is summarised below in Table 8:

Table 8 Trends in commercial property growth in Chelmsford

Sector	2012 position floorspace (m ²)	2012 position (number of units)	Floorspace growth 2000 - 2012 %
Retail	360,000	1,210	10.4
Office	285,000	970	19.2
Industrial	673,000	1,350	2.7
Other	127,000	390	53.0
Total	1,445,000	3,920	10.9

Source: Valuation Office Agency

Comparisons of stock within Essex and the region

8.3 Table 9 compares Chelmsford's floorspace figures with other comparable towns and cities in Essex and the South East. In comparison with other towns in Essex it is apparent that Chelmsford's overall commercial stock is relatively healthy, having the largest office floorspace and the second largest industrial floorspace. However, there are examples of comparable towns where, in some areas, Chelmsford's stock would appear to be relatively low, for example, in the amount of retail floorspace.

8.4 Compared to other towns and cities in the South East Chelmsford also has a relatively healthy supply of commercial stock, with the third highest industrial floorspace and the fifth highest office floorspace in the region. Again, Chelmsford's retail floorspace is relatively low.

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Table 9 Comparisons of stock within Essex and the region

Town/City	Office floorspace (m ²) 2012	Retail floorspace (m ²) 2012	Industrial floorspace (m ²) 2012
Chelmsford	285,000	360,000	673,000
Colchester	208,000	435,000	644,000
Southend	216,000	438,000	446,000
Basildon	215,000	380,000	1,225,000
Reading	565,000	533,000	632,000
Cambridge	392,000	1,051,000	273,000
Norwich	378,000	584,000	879,000
Maidstone	218,000	329,000	650,000
Windsor and Maidenhead	430,000	264,000	313,000

Source: Valuation Office Agency

The current supply position in Chelmsford

8.5 In order to address Chelmsford's prospects for meeting future employment demand and economic growth it is necessary to assess the current position regarding supply. This section addresses the supply of land and major development sites within the Council's area, land expected to form part of the future land supply; and vacant property currently on the market. The following are considered:

- Chelmsford City Centre
- Edge of urban area business parks
- Vacant commercial space on the market
- Future land supply

8.6 The data from this analysis is then summarised to present an overall picture of employment land supply in Chelmsford.

8 Review of Current and Future Employment Land Supply

Assessment of Current Supply

Chelmsford City Centre

8.7 There is relatively limited availability of land supply in the City Centre of Chelmsford to accommodate future employment growth. The changing structure of the Chelmsford economy, from a manufacturing centre to a service centre economy has been a gradual one. It has led to some historic large employment sites being redeveloped primarily for residential-led development, for example the former Marconi Works at New Street and the former Marconi Radar site at Writtle Road. This is not in itself a disadvantage for the City Centre but a reflection of two trends – the changing nature of employment in Chelmsford and the high residential land value that sites in Chelmsford City Centre can command. Nevertheless, there are some key sites in the City Centre that are expected to accommodate future employment growth as detailed below:

Table 10 Future City Centre employment developments

Site Location	Site Description	Floorspace potential (m ²)	Primary uses
Former ARU Central Campus	Anne Knight building	830	Offices/DI
	Frederick Chancellor building	1,094	Offices/DI
	Law building	2,340	Offices/DI
	New shops/restaurants/DI	1,663	Mixed commercial
	Phase 2	Mix not yet known	Not yet known
Former Marconi site, New Street	1912 Building and refurbished space	1,913	Offices
	Block E	1,517	Offices
	Block M	6,178	Offices
	New ground floor commercial	550	Mixed commercial
East of High Street	John Lewis	11,148	Retail
	Unit shops	10,957	Retail
	Shops/restaurants	2,607	Mixed commercial
	Cinema	1,932	Cinema
Waitrose, Victoria Road	Main store	2,224	Food store
	Other floorspace	630	Mixed commercial

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Site Location	Site Description	Floorspace potential (m ²)	Primary uses
Aldi, Parkway	Retail floorspace	1,482	Food store
Essex County Cricket Club	Commercial floorspace	1,754	Mixed commercial
Premier Inn, Victoria Road	99 bed hotel	3,785	Hotel
Amlin HQ	Headquarters building	6,035	Offices

Source: Chelmsford City Council Analysis of Planning Applications

8.8 The above data reflects sites that have planning permission. These sites are considered to have a reasonable prospect of coming forward in the short term (0-3 years). A number of sites are currently under construction, such as Amlin's new headquarters at Victoria Road.

8.9 In addition, a number of sites allocated in the adopted Chelmsford Town Centre Area Action Plan can reasonably be expected to come forward in the short/medium term (3-5 years), and will further add to the City's employment growth. Key sites include:

- Anglia Ruskin University's Campus – some limited opportunity for increased floorspace, for example an expansion of the Business Innovation Centre for Medical and Advanced Engineering.
- Chelmer Waterside – likely to be primarily residential, but capacity to accommodate some employment uses, although mix not known at this stage.
- County Hotel and car park – potential redevelopment opportunity, no firm proposal at this stage.
- Civic Centre car park – no firm proposal at this stage, but potentially a site suitable for major commercial development.

8.10 These medium and longer term sites in the City Centre are dealt with in the section below addressing future land supply.

8.11 Based on the sites listed in Table 10 it is estimated that the City Centre has the capacity to accommodate the following new floorspace in the short term (see also paragraphs 8.18-8.24).

8 Review of Current and Future Employment Land Supply

Table 11 Chelmsford City Centre Employment Land Capacity

Offices (m ²)	Retail (m ²)	Mixed commercial (m ²)	Leisure/Hotels (m ²)
19,907 ¹	25,811	7,204	5,717

Source: Chelmsford City Council (2014)

Note – ¹ assumes all space on the ARU Central Campus is taken as office floorspace.

Edge of Urban Area Business Parks

8.12 Chelmsford's last significant out of centre business park allocations were developed over the past 20 years – Chelmsford Business Park and Springfield Business Park, both in the north-eastern sector of the City. These have proved popular business locations. Springfield Business Park has tended to attract warehousing/distribution-based businesses, whereas the adjacent Chelmsford Business Park, due to its low density high quality landscaped setting has attracted more office based/high technology businesses. Both developments commenced in the late 1980s/early 1990s and are now nearing full capacity. Also, within this location, at Colchester Road there are some other commercial sites with capacity to accommodate future economic growth. Table 12 sets out future capacity within these sites:

Table 12 Business Park capacity sites

Site location	Floorspace (m ²)	Primary uses
Chelmsford Business Park	304 (Plot F)	Offices
Springfield Business Park	17,070	B1/B8
CM2, Colchester Road	4,459	Offices
The Exchange, Colchester Road	1,369	Offices
Total	23,202	Various

Source: Chelmsford City Council (2014)

Vacant Commercial Space on the Market

8.13 Vacant commercial property is a good indicator of a number of factors. Firstly, it is an indicator of the health of the local economy, the most common example being high retail vacancies indicating a city or town centre that is in poor health. Vacancies in the office market can indicate a mismatch between supply and demand, and can often mean in the case of a location such as Chelmsford, that older stock does not necessarily meet current business needs. Within traditional Employment Areas vacancy can again be an indicator of poor stock that does not match the needs of modern business.

8.14 This section of the Employment Land Review assesses the existing vacant stock within Chelmsford across the office, industrial and retail sectors of the local economy. The information has been sourced from two separate datasets; EGi (Estates Gazette Interactive) and Focus (a national commercial property database). Both datasets rely upon local commercial property agents adding

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property availability and although a good guide to the current market, the data presented is not necessarily a complete representation of the current situation. Nevertheless, it provides a good guide to the local property market.

Table 13 Vacant commercial premises - April 2014

Data source	Vacant office floorspace (m ²)	Vacant industrial floorspace (m ²)	Vacant retail floorspace (m ²)
Focus Q1 2014	34,940	20,321	6,254
EGi April 2014	46,278	59,870	12,669

Source: EGi (April 2014) and Focus (April 2014)

Office vacancies

8.15 According to Focus, office vacancies in Chelmsford have increased sharply since 2007. In 2007 there was approximately 12,500m² of office floorspace vacant, compared to 34,940m² in the first quarter of 2014. The vacant office stock in the City Centre is often of lower grade, and not suited to modern day businesses which look for Grade A accommodation. The changes to the planning system are enabling some of this stock to now be converted to residential without the need for planning permission, as at Cater House. Chelmsford is experiencing some businesses leaving lower grade space and moving to Grade A, or higher specification space within Chelmsford – Amlin being a prime example, and Bellway's intention to move from Bellway House to a new headquarters building at the former Marconi site. However, there are also indications that the poor quality of some of Chelmsford's stock and the lack of higher quality alternatives is leading to some businesses leaving Chelmsford and relocating to other areas, for example Cofund's decision to move to Witham in 2013. The availability of only relatively low grade space and the lack of Grade A alternatives could be an issue for Chelmsford in not only retaining some businesses, but also attracting new investment.

Industrial and Warehousing vacancies

8.16 Chelmsford has also seen an increase in the levels of vacant industrial floorspace. In 2007 this was just 2,675m² compared to 20,321m² in the first quarter of 2014. The amount of available industrial floorspace is not particularly significant. According to EGi there are less than 50 industrial/warehousing units available across the City area. In some of the larger employment areas vacancy rates are not unusually high. For example, on Widford Industrial Estate there are just six vacant units, on Dukes Park four vacant units, and across the three employment areas in South Woodham Ferrers just eight units. This is considered to be a relatively natural turnover of units. In recent years there has been a slightly more flexible approach to planning policy within the allocated employment areas, where uses outside of the B classes, including D1 and D2 uses have been permitted within vacant units. It is likely that this has reduced the overall level of vacancies.

Retail vacancies

8.17 According to the Focus database, retail vacancy rates, as with office and industrial rates, have shown an increase in recent years. Since 2009 retail vacancies across the City area have doubled from approximately 2,800m² to 6,250m² in the first quarter of 2014. This is not particularly high and in comparison with many towns and cities Chelmsford has bucked the national trends. The John Lewis development will add a significant amount of new floorspace to Chelmsford's stock (22,000m²).

8 Review of Current and Future Employment Land Supply

This may lead to a rebalancing of retail space across the City Centre and other vacancies. The Retail Capacity Study (April 2014) indicates that, on completion of this scheme, Chelmsford will be at capacity for comparison shopping floorspace until 2031. Increased flexibility through the planning system should help Chelmsford encourage new uses into the City Centre, and plans to improve public realm and encourage new restaurant quarters should help to ensure that the City can keep vacancy rates low, and maintain vitality.

Future Land Supply

8.18 There is a future supply of land within Chelmsford, that is either allocated within the adopted Local Development Framework, or is likely to come forward in the medium term. This is presented in Table 14 below. This table does not present every opportunity, but focuses on the key sites and locations:

Table 14 Land Supply sites

Location	Floorspace potential (m ²)	Planning status	Timeframe	Likely uses
Essex Regiment Way	24,000	Allocated in NCAAP	Available	B2/B8
Greater Beaulieu Business Park	40,000	Allocated in NCAAP, outline planning permission	From 2018	B1
Greater Beaulieu Park adjacent station	9,000 B1, 3,000 retail, 3,700 hotel, 2,000 leisure, 500 day nursery	Allocated in NCAAP, outline planning permission	From 2018	A1, B1, D1, D2 and C1
Greater Beaulieu Neighbourhood Centre	3188	Allocated in NCAAP, outline planning permission with reserved matters application currently under consideration	From 2016	A1, health centre, community uses, day nursery
Britvic factory site	21,250 (estimate)	Existing employment area, no current proposal	Unknown	A1, B1, B2, B8
County Hotel Car Park	1,700 (estimate)	Allocated in TCAAP, no current proposal	Unknown	B1 or C1
Civic Centre Car Park	10,000 (estimate)	Allocated in TCAAP, no current proposal	Unknown	B1
Chelmer Waterside	5,000 (estimate)	Allocated in TCAAP, no current proposal	Unknown	A1/D2

Source: Chelmsford City Council (2014)

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Summary of employment land supply

8.19 The current employment land supply position in Chelmsford, based upon this section of the Review, is summarised in Table 15 below:

Table 15 Summary of Employment Land Supply

Source	B1 Offices (m ²)	B2/B8 Industry/Warehousing (m ²)	Retail (m ²)	Mixed commercial (m ²)	Leisure/Hotels (m ²)
Chelmsford City Centre	19,907	0	25,811	7,204	5,717
Edge of City Centre	6,132	17,070	0	0	0
Known Future supply	60,700	45,250	4,175	7,513	5,700
Vacant space	34,940	20,321	6,254	0	0
Totals	121,679	82,641	35,065	12,704	11,417

Source Chelmsford City Council (2014)

8.20 The above summary would suggest a relatively healthy position of employment land supply. However, this presents a scenario that assumes some key sites will come forward for employment uses, but which ultimately may come under pressure for residential or other non-employment led uses.

8.21 A key point is that there is currently a relatively low supply of greenfield business park availability, only one plot remains at Chelmsford Business Park for example. In the City Centre, the opportunities for Grade A office space development are limited, although some development is taking place through land assembly, demolition and rebuild, Amlin being an example. In combination this position has resulted in some investment going outside Chelmsford.

8.22 Despite the availability of a significant amount of vacant floorspace, particularly offices, this is generally out-dated accommodation and often does not meet the needs of business. In combination, this supply position could have an impact on Chelmsford's ability to attract new investment in the short term.

8.23 Longer term, as the Greater Beaulieu Business Park development progresses, the situation should start to ease and the market may see more similar projects to the Amlin scheme in the City Centre.

8 Review of Current and Future Employment Land Supply

8.24 Although not included in the above future supply figures, it is important to note that the emerging proposals for Temple Farm will in effect remove this site from the traditional employment land supply line. Although the proposal will have a beneficial impact on the local economy of Chelmsford, it will no longer be available for its original allocation for industrial and warehousing development of circa 70,000 m². This could be an issue for Chelmsford in terms of meeting future demand in the warehousing and distribution sector which this allocation sought to meet when it was originally allocated.

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Section 9 Future Demand for Employment Land

Introduction

9.1 Forecasting future demand for employment space is not straight forward. It is dependent on many factors – the strength of the global, national and local economies, skills availability, business support and efforts to target particular sectors, housing provision, market signals, growing sectors, transport, and the provision and availability of other infrastructure. Land use provision and supply is just one part of a complex picture.

9.2 For the purposes of this section of the Review, the East of England Forecasting Model (EEFM) has been used to forecast employment growth. The EEFM is currently forecast annually with the latest information sourced from Spring 2013. This provides an estimated forecast in employment growth (by employee numbers) across a variety of sectors up to 2031. This growth in employment projection has then been converted into a forecasted floorspace requirement using the OffPAT/HCA Employment Density Guide (2nd edition 2010). The final stage compares the supply position identified in Section 8 with the forecasted demand position, to assess whether there is a mismatch between supply and demand within Chelmsford up to 2031.

East of England Forecasting Model (2013)

9.3 The EEFM is designed to facilitate the setting of consistent housing and jobs targets across the East of England Region. It provides a set of 'baseline' forecasts, developed by a leading independent forecasting house (Oxford Economics), which cover a wide range of variables including Gross Value Added, employment by sector, self-employment, unemployment, population, households, demand for dwellings, and carbon emissions.

9.4 The EEFM was also designed to be flexible, and provides a means of generating scenarios such as high growth and low growth, and local scenarios. Examples of local scenarios include determining the likely demand for dwellings as a result of a future increase in jobs, and understanding the impact on population and job growth as a result of the level of housing provision.

9.5 The model produces a series of scenarios: baseline, high migration and 'the lost decade and beyond' (a scenario based on the previous period of decline which forecasts no growth), each of which generate varying employment forecasts.

9.6 For the purposes of this Employment Land Review the baseline scenario has been used. The full methodology for the EEFM is available at www.cambridgeshireinsight.org.uk/EEFM

9.7 In summary, the EEFM baseline forecast shows employment growth in Chelmsford increasing from 99,900 jobs in 2013 to 118,000 jobs in 2031, a total growth of 18,100 jobs, or approximately 1,000 jobs per annum. This increase is shown across a variety of sectors, with the largest increases seen in the service sector, although some more modest increases in transport, construction, education, health and retail. Manufacturing jobs are forecast to level out over the period and are not showing dramatic falls or gains. It should be noted that the EEFM provides unconstrained forecasts which are based upon past trends which do not take into account the deliverability of future proposals for new jobs.

9 Future Demand for Employment Land

Future Demand in Chelmsford 2013-2031

9.8 The data from the EEFM model has been consolidated by land use/premises type in Chelmsford for the period 2013-2031. Five land and premises types have been assumed:

- Land based (Agriculture, Utilities, Waste and Remediation, Construction)
- Offices (Publishing and Broadcasting, Telecommunications, Computer Related Activity, Finance, Real Estate, Professional Services, R + D, Business Services, Employment Activities, Public Administration incl Land Forces, Other Services)
- Industrial/Warehousing (Food Manufacturing, General Manufacturing, Chemicals, Metals, Transport, Electronics, Wholesale, Land Transport)
- Retail (Retail, Hotels and Restaurants, Arts and Entertainment)
- Health and Education (Health and Care, Education)

9.9 Using these land use and premises types, the forecasted growth in employment of 18,100 employees up to 2031 across the consolidated sectors has then been mapped against the land use/premises type.

9.10 Employment densities (recognised floorspace requirements per employee) for each type of property have then been applied to give an indicative floorspace requirement by each property type. Land based uses, and health and education have been excluded as there are no published employment densities that can be applied. This is summarised in Table 16 below:

Table 16 Chelmsford Employment and Land Use Forecasts 2013-2031: Baseline Scenario

Land Use/Premises Type	Employment Growth (employees) 2013-2031	Employment Density m ² /employee	Floorspace Requirement (m ²)
Land based	2,000	N/A	-
Industrial & Warehousing	1,000	58	58,000
Retail (incl Leisure, Hotels & A3-A5)	2,600	18	46,800
Office	10,600	12	127,200
Health & Education	1,900	N/A	-
Total	18,100	N/A	232,000

Source: Chelmsford City Council Analysis and Interpretation of EEFM

9.11 The analysis is based on the EEFM baseline forecast and identifies that, in the period to 2013-2031, Chelmsford needs to have a potential land supply capable of accommodating 232,000m² of additional floorspace.

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9.12 A second scenario has also been modelled, based on the high migration scenario. This scenario uses data sourced direct from the latest Office of National Statistics (ONS) migration assumptions which does not take into account the detailed modelling assumptions on migration employed by Oxford Economics for the East of England. This scenario predicts more significant economic growth in Chelmsford in the same period, and is summarised in Table 17 below:

Table 17 Chelmsford Employment and Land Use Forecasts 2013-2031: High Migration Scenario

Land Use/Premises Type	Employment Growth (employees) 2013-2031	Employment Density m ² /employee	Floorspace Requirement (m ²)
Land based	2,200	N/A	-
Industrial & Warehousing	1,300	58	75,400
Retail (incl Leisure, Hotels & A3-A5)	3,000	18	54,000
Office	11,400	12	136,800
Health & Education	2,400	N/A	-
Total	20,300	N/A	266,200

Source: Chelmsford City Council Analysis and Interpretation of EEFM

9.13 The analysis identifies that in the period to 2013-2031, based on the EEFM high migration forecast Chelmsford needs to have a potential land supply capable of accommodating 266,200m² of additional floorspace.

9.14 There is a difference of 34,200m² between the baseline forecast and the high migration scenarios.

Supply versus Demand Analysis

9.15 Having assessed the current position regarding the supply of employment land and the forecasted employment growth for Chelmsford up to 2031 this part of the Study assesses the match between supply and demand, with a view to identifying whether Chelmsford is in a healthy position to meet anticipated growth in the coming years. Floorspace requirements are sub-divided into industrial/warehousing, retail (including leisure) and offices. For the purposes of this part of the Study vacant space has been excluded from the assessment of supply. The findings of this assessment are set out in Table 18.

9 Future Demand for Employment Land

Table 18 Supply and Demand Summary

Premises Type	Baseline Scenario Position to 2031 (m ² floorspace)	High Growth Scenario Position to 2031 (m ² floorspace)
Industrial/Warehousing	+4,320	-13,080
Retail/Leisure	+6,132	+1,068
Offices	-40,300	-49,900

Source: Chelmsford City Council/EEFM

Industrial and Warehousing

9.16 The baseline scenario for growth suggests a demand for 58,000m² industrial/warehousing buildings. The high growth scenario suggests a demand for 75,400m². The supply analysis indicates that there is a total of 62,320m² (excluding vacant premises) of floorspace is available to accommodate industrial/warehousing development in Chelmsford's administrative area. Of this, there is 17,070m² available at Springfield Business Park and 45,520m² created through future developments. The future supply is made up of an estimated supply of 24,000m² at Essex Regiment Way and an assumption that the Britvic site could provide up to 21,250m² if it was redeveloped.

9.17 This would suggest that demand and supply is close to being in balance for the baseline scenario, but demand would not be met for the high growth scenario.

9.18 There are also a number of other factors that should be taken into account. The position today is that the opportunities for industrial/warehousing development may be rather more limited than the analysis suggests. The only greenfield location is Springfield Business Park, which is likely to be completed in the next two/three years, although Essex Regiment Way (known as Regiment Business Park), provides industrial and warehousing opportunities on plots of up to 4.7 hectares (11.5 acres). Once these two opportunities are realised there will be no developable land in Chelmsford for industrial/warehousing type development, other than the Britvic site, should that be redeveloped. With Temple Farm now unlikely to come forward for B2/B8 development, this will place further pressure on the existing supply.

Retail (including Leisure)

9.19 The baseline scenario for retail and leisure growth shows an estimated demand for 46,800m². The high growth scenario shows a demand for 54,000m². The supply analysis for retail, mixed commercial and leisure/hotels indicates that there is 52,932m² available (excluding vacant premises).

9.20 This suggests that supply and demand is broadly in balance to accommodate retail and leisure growth in Chelmsford to 2031 in both the baseline and high growth scenarios.

9.21 The recent Retail Capacity Study (2014) confirms that current allocations for comparison shopping in the City will meet future demand to 2029.

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Offices

9.22 The baseline scenario for demand for office based development suggests a demand of 127,200m². The high migration scenario suggests a possible demand of 136,800m². The supply analysis (excluding vacant space) shows a supply of 86,900m². This includes a range of sites currently underway in the City Centre, sites on the edge of the City Centre, primarily around Chelmsford Business Park and a number of future sites that should come forward in the medium term.

9.23 This analysis would suggest a supply shortfall of 40,300m² in the baseline scenario and 49,900m² in the high growth scenario. This would be exacerbated should certain sites presently assumed to be suitable for office development not come forward in the planning period. Likewise, should some of the existing vacant stock be taken up or redeveloped the supply position would clearly be improved.

9.24 A key factor is the future supply of office development in Chelmsford. There are two primary City Centre sites where office development is actively being brought forward – Marconi Works, New Street and the former ARU Central Campus site. Both have capacity for new office development, but this is limited and no speculative development is currently taking place. Out of the City Centre there is limited availability at Chelmsford Business Park (465m²), and CM2/The Exchange (5,828m²). With an upturn in the economy now apparent, it is reasonable to assume that these sites will be developed in the short term. The next office supply will in all likelihood come from the Beaulieu Business Park, which should become available from about 2018, with only very limited opportunities in the City Centre. There could therefore conceivably be a period when Chelmsford is not able to offer many office based opportunities, which would have an impact on the City's availability to attract new investment.

9.25 If Chelmsford is to continue to be successful in attracting and retaining office based businesses and in attracting investment from elsewhere, particularly back office functions from London, then the supply of suitable sites that can accommodate new quality grade A space will be critical to the future success of the City.

Conclusions

9.26 In summary, this section of the Review demonstrates that:

- There is a significant undersupply of office floorspace in the baseline and high growth scenarios.
- There is a broad balance between supply and demand in the retail/leisure sector in both growth scenarios.
- There is a broad balance of industrial/warehousing floorspace in the baseline scenario, but an undersupply in the high growth scenario.

10 Conclusions

Section 10 Conclusions

10.1 There are a number of conclusions that can be drawn from this Employment Land Review and the key points are set out below. These conclusions will be tested through the public consultation exercise, in particular through engagement with the local business community and local commercial property agents.

A strongly performing economy that has seen a growing commercial sector in recent years

10.2 The Chelmsford economy is performing very strongly, contributing £3.4 billion to the UK economy annually. 91,500 Chelmsford residents are in employment, with unemployment presently very low at 1.8%. The City supports over 84,000 jobs, more than any other district in Essex, across a balanced economy that has seen a shift to more service focused jobs, although the advanced manufacturing sector in Chelmsford is still relatively strong. The City is one of the business start-up hot spots in the UK and supports over 11,000 businesses. London has a strong influence on Chelmsford, although a similar number of people commute into Chelmsford to work as leave each day. There has been growth in the amount of floorspace in the retail, office and industrial sectors in Chelmsford over the last ten years.

29 Allocated Employment Areas with limited capacity to expand and few vacancies at the present time

10.3 Chelmsford has a good range of 29 allocated employment areas across the City that is a key part of the economic base. These vary in size, quality and location – ranging from the low density Chelmsford Business Park to more functional employment locations within the City Centre and in some of the villages/rural areas, for example Rivermead Industrial Area. This variety is important to support the balance of business types across the City area. Most of the allocated employment parks are at capacity and have limited opportunities for expansion as they are physically constrained. There are some vacancies across the employment areas, but these are considered to be limited. In June 2014 there were some 50 vacant industrial/warehousing units on the market.

An apparent shift of uses within the 29 Allocated Employment Areas beyond the B Use Classes

10.4 An analysis of planning application data over the past ten years shows that over 160,000 m² of business floorspace has been granted planning permission in the allocated employment areas in the last ten years, some of which is new space and some of which will be additions to existing stock. However, the new space permitted may not all have been implemented. In some employment areas non-traditional employment uses have been introduced and nine employment areas have seen a potential net loss of Class B floor space of 13,500m². Uses in this category have included churches and leisure facilities.

The rural area is making a significant contribution to business floorspace provision with some key non-allocated employment locations

10.5 There is a significant amount of business activity taking place within the parishes and rural areas. Excluding Great Baddow, Springfield, Broomfield, Writtle and South Woodham Ferrers there are 1,300 businesses occupying an estimated 255,000 m² of floorspace (222,000 m² of which is outside of the allocated employment sites in those areas). This floorspace makes an important contribution

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to the Chelmsford's employment stock. An analysis of planning application data over the past ten years shows that there have been some significant potential additions to employment stock through the granting of planning permissions for business development. The majority of the 27 parishes have seen some form of potential growth, primarily attributable to the conversion of existing rural buildings. The rural areas have undoubtedly provided a new stock of business floorspace and will be likely to continue to do so in the coming years. This is probably in part due to the relaxation of national and local planning policy, but also due to a shortage of suitable accommodation in Chelmsford and South Woodham Ferrers. Scope for further expansion may be limited by local planning policy.

A strong City Centre with higher levels of office floorspace than any other town in Essex, but a large stock of vacant space and limited Grade A opportunities

10.6 Chelmsford has an office floorspace stock of approximately 285,000 m², the largest stock anywhere in Essex. Other comparable regional cities have more floorspace, for example Reading 565,000 m², Cambridge 392,000 m² and Norwich 378,000 m².

10.7 It is estimated that there is between 35,000 to 46,000 m² of vacant office floorspace available in Chelmsford's administrative area in June 2014. Much of this is lower grade space and often does not meet the needs of modern businesses. It is therefore a constraint on Chelmsford's ability to attract new investment. Whilst some of this space is being refurbished to a higher standard, and some stock is being converted to residential, it is reasonable to assume that Chelmsford will continue to have a stock of vacant office space for the foreseeable future. The amount that is attractive to businesses may be limited and not all is necessarily capable of being converted to residential. A key issue will be the future of this surplus stock.

10.8 Experience in recent years has demonstrated that expanding businesses in certain sectors, for example the financial services sector, require Grade A office floorspace. The supply in Chelmsford of Grade A space has often not been able to meet demand and as a result investors have chosen to relocate. There is very limited Grade A space available in the City Centre and this will continue to be a constraint to Chelmsford attracting investment. Whilst some redevelopments are ensuring business expansion and business retention, the City Centre has limited development opportunities for new office space.

An apparent mismatch between supply and demand in relation to office based growth

10.9 There would appear to be a significant mismatch between future demand from businesses that are likely to require office accommodation and available supply. In the baseline scenario there is an estimated undersupply of 40,300 m² to 2031 and an undersupply of 49,900 m² in the context of the high growth scenario. It is reasonable to assume that Chelmsford's economic growth could therefore be constrained by the lack of suitable office floorspace in the next 20 years.

A City Centre with a strongly performing retail sector

10.10 Chelmsford has a strong retail sector that supports over 10,000 jobs. With some 125,000 m² of retail floorspace in the City Centre, Chelmsford performs well against other towns and is attractive to new investors given its socio-economic and demographic composition. Retail vacancies

10 Conclusions

are relatively low and the City is well placed to accommodate future growth through the development of the Bond Street (John Lewis) development. This will continue to be a strong sector in Chelmsford and important to the local economy.

A good match between supply and demand in relation to retail growth

10.11 The Employment Land Review suggests that there is a good match between likely demand for retail employment growth and the land supply required to meet this demand. This is confirmed by the Retail Capacity Study (GVA, 2014) up to 2036.

A tight land supply position in relation to industrial and warehousing based growth

10.12 The position is less critical in relation to land for industrial/warehousing development. The baseline position to 2031 indicates that supply and demand is broadly in balance, although in the high growth scenario there is a slight undersupply of 13,000 m². The loss of a key allocation such as Temple Farm which would have met growth of 69,000 m² is significant in this context.

Limited greenfield employment opportunities on the edge of the City Centre

10.13 Businesses often want the ease of being able to design and build purpose-built premises and often seek greenfield locations to do that. Chelmsford Business Park is a prime example where this has been possible and the site has attracted a number of key businesses that may not have been able to develop so easily on brownfield sites. Businesses such as Visteon, ebmPapst and Battelle have all been able to have purpose-built buildings developed for them. These are important businesses to the local economy. There are only limited opportunities remaining on Chelmsford's two existing greenfield business parks. It is estimated that they have capacity for about 17,000 m² of development, which it is estimated will be taken up within 2-3 years. After that, Chelmsford's greenfield employment land supply will be exhausted until further development comes on stream.

A likely time lag between existing employment land being taken up and new employment land coming onto the market

10.14 Additional land has been allocated for future business growth on the edge of the City Centre in north Chelmsford. At Greater Beaulieu Park 40,000 m² has been allocated for a new business park and at Essex Regiment Way there is capacity for 24,000 m² of floorspace. Essex Regiment Way is available now, but is not really an office based, high quality landscaped business park development, and is proving more attractive to B2/B8 businesses. The Beaulieu Business park will undoubtedly meet some of Chelmsford's future demand and the type of occupier will be enhanced once the new rail station is opened. However, it is estimated that the earliest any new development will be brought forward at this business park will be around 2018/19. There will therefore be a period when investment opportunities in Chelmsford are limited by this time lag.

Having the available supply is key to attracting investment

10.15 There is strong evidence to suggest that Chelmsford's ability to attract new investment is closely linked to the availability of land and premises supply. Having the right quality property, or the ability to design and build to meet a business' specific requirements, is of paramount importance. Visteon came to Chelmsford initially because there was a high quality speculative building available for them on Chelmsford Business Park; Battelle have relocated there because they could have a

Conclusions 10

purpose-built facility constructed for them to meet their requirements; Cofunds chose to leave Chelmsford as there was no Grade A office opportunity for them in the City Centre and Amlin were able to purchase their site at Victoria Road to design and build their new headquarters.

A flexible supply is needed to support a range of sectors

10.16 Chelmsford's economic growth in recent years has been strong and this has partly been due to the availability of a flexible supply of greenfield and brownfield development opportunities that have been able to meet business needs. Whilst some investment opportunities have been lost due to the lack of suitable sites/premises, on the whole Chelmsford has performed well. As the City continues to grow it will be important that a flexible and adaptable supply of employment land is retained and brought forward. This will be particularly important as Chelmsford continues to grow key sectors, such as the financial services sector and new sectors such as medical technologies linked to the growth of the University in the City as a key economic driver to become a world-renowned centre of excellence for innovation, specialising in research and development in the field of medical technology to create a unique image and identity for Chelmsford.

I Allocated Employment Areas

Appendix I Allocated Employment Areas

BAE Systems Employment Area

I.1 BAE Systems, Great Baddow Employment Area CM2 8HN

Area: The BAE Systems Employment Area lies to the south east of Chelmsford, on the edge the village of Great Baddow.

BAE Systems Site



Site Area	4.62 ha
Estimated Floorspace	18,675m²
Number of Vacant Units being marketed which may not include all actual vacant units (based on EGi data)	1 industrial 1 office

I.2 The site lies on the southern outskirts of the village of Great Baddow to the south east of Chelmsford. The site is an employment area that is a mixture of B1 and B2 floorspace, occupied primarily by BAE Systems an international defence company, as well as a number of other smaller businesses.

Condition of Site/Buildings

I.3 The site has a mixture of well maintained buildings, as well as older units in need of refurbishment. The site has undergone limited investment in recent years and a northern section of the site has been redeveloped for housing. There is also a large surface car park.

Business

I.4 The site provides a range of B1 office and B2 industrial buildings, partially used as a research and technology facility. Some of the buildings are scattered across the site.



Conclusion

I.5 The site is anchored by a company conducting transactions both nationally and internationally. The site is therefore strategically important and has undergone some limited redevelopment to improve the facilities that are available on the site. It has good road links to both the A12 and the A130.

Allocated Employment Areas I

Banters Lane Employment Area

1.6 Banters Lane Employment Area CM3 INT

Area: The Banters Lane Employment Area lies to the north of Chelmsford on the outskirts of the village of Great Leighs.

Banters Lane Site



Site Area	1.14 ha
Estimated Floorspace	2912 m²
Number of Vacant Units being marketed which may not include all actual vacant units (based on EGi data)	0

1.7 The site lies in a rural location to the north of the village of Great Leighs, to the north of the City Council's



administrative area. It is a new allocation and comprises a mix of land usages from modern offices (B1) to storage units (B8). The site lies adjacent to the A131 providing easy access onto the primary road network, the site is also in close proximity to the Great Leighs Bypass, providing access to the strategic road network.

Condition of Site/Buildings

1.8 The site is well maintained and the units are modern in appearance, the access is wide and accessible to HGV/LGVs.

Business

1.9 The site is primarily made up of light industrial businesses (B1) and storage/warehouse units (B8).



Conclusion

1.10 The Banters Lane Employment Area provides small industrial units, as well as modern office floorspace in a rural location. The site is accessible to HGV/LGVs and provides close access to both the primary and strategic road networks. The site is served by the 70/70X bus route, providing regular services between Chelmsford and Colchester via Braintree.

I Allocated Employment Areas

Beehive Lane Employment Area

I.11 Beehive Lane Employment Area CM2 9TE/CM2 9JY

Area: The Beehive Lane Employment Area lies to the east of Chelmsford City Centre.

Beehive Lane Site



Site Area	1.93 ha
Estimated Floorspace	4,814 m²
Number of Vacant Units being marketed which may not include all actual vacant units (based on EGi data)	1 industrial 3 office

I.12 The site is divided by Beehive Lane (B1009), which runs north to south through the site. The western half of the site known as Beehive Business Centre is formed of 10 units which are smaller sized B1/B2 units. Within this employment area two units have now changed use to a gym and a martial arts karate club (D2).

I.13 The eastern portion of the site is known as Beehive Works, this is a small well-established industrial estate formed of small industrial units. Both of these sites have minimal landscaping.



Condition of Site/Buildings

I.14 The buildings and units are generally of 1930/50s construction, generally providing older style accommodation.

Business

I.15 The site is predominantly made up of smaller B1 and B2 units.

Conclusion

I.16 The Beehive Lane Employment Area provides small industrial units, although there is restricted HGV access into Beehive Works which limits accessibility into the site. The 41/45/51 bus routes serve the site providing regular services to Chelmsford city centre. There would also appear to be a problem with parking on the site as vehicles park opposite on the B1009.



Allocated Employment Areas I

Chelmsford Business Park Employment Area

I.17 Chelmsford Business Park CM2 5LB

Area: Chelmsford Business Park employment area lies to the north east of Chelmsford on the outskirts of Chelmsford.

Chelmsford Business Park Site



Site Area	16.30 ha
Estimated Floorspace	17,319 m²
Number of Vacant Units being marketed which may not include all actual vacant units (based on EGi data)	0 industrial 6 offices

I.18 The site lies to the north east of Chelmsford within the defined settlement boundary, it is south of the Boreham Interchange and has good access to the primary road network.

Condition of Site/Buildings

I.19 The site is a low density development which has been well maintained, the units are also modern in construction and appearance. There is a large amount of car parking provided within the site, and there is a large amount of landscaping both within the site and at the site boundary separating it from the B1137.



Business

I.20 The site is dominated by B1 uses and a number of buildings are used by national and international companies including company headquarters. There is a mix of unit sizes, resulting in a number of small and medium sized enterprises being located there.



Conclusion

I.21 The Chelmsford Business Park employment area provides flexible units for business use, the site is laid out in a parkland setting aimed at attracting B1a businesses. There is good access into the site in conjunction with the site lying in close proximity to the primary road network. There is also room for expansion within the site with the road infrastructure already built.

I Allocated Employment Areas

Church Street Employment Area

I.22 Church Street Employment Area, Great Baddow CM2 7HY

Area: The Church Street Employment Area lies to the south east of Chelmsford on the outskirts of the village of Great Baddow.

Church Street Site



Site Area	2.25 ha
Estimated Floorspace	6,805 m²
Number of Vacant Units being marketed which may not include all actual vacant units (based on EGi data)	0 industrial 6 offices

I.23 The site lies on the south eastern edge of Great Baddow both to the north and south of Church Street. The buildings on the site are of varying age and size, with a refurbished Victorian

former brewery building and modern units including an antiques centre. The site is surrounded by post-war housing development and lies close to the A12 and A130 providing good road links to London, East Anglia and South Essex.

Condition of Site/Buildings

I.24 The units and road surface on the site to the north appear to be in good condition. The site to the north is well maintained and contains a number of smaller units, which appear to be conversions of older buildings. The site to the south has an MOT centre (sui generis) and a number of medium sized units currently vacant or used for storage. The site road surface is poor within this part of the site and there is a large amount of informal parking.



Business

I.25 The site has a wide mix of B1, B2 and B8 and sui generis uses, although a number of the units have been lost to residential (C3) and there is a dance centre (D2).

Conclusion

I.26 The site to the north of Church Street contains a number of refurbished older buildings primarily B1 use class, ideally suited to small and medium sized businesses. The southern part of the Church Street Employment Area comprises modern buildings for B1, B2 and B8 uses, and the site is well used due to its good road connections to both Chelmsford and the region.



Allocated Employment Areas I

Colchester Road Employment Area

I.27 Colchester Road Employment Area CM2 5PD

Area: The Colchester Road Employment Area lies to the north east of Chelmsford on the outskirts of Chelmsford.

Colchester Road Site



Site Area	16.47 ha
Estimated Floorspace	17,539 m²
Number of Vacant Units being marketed which may not include all actual vacant units (based on EGi data)	2 industrial

I.28 The site is located off Colchester Road and is formed of two main areas Hedgerows Business Park and land used as a depot by Essex County Council. The



railway line and A138 form the northern boundary of the site, and Colchester Road forms the southern boundary. The land use is relatively low density and the employment area also contains two car showrooms accessed off White Hart Lane (A130). The car auction site lies further to the north and can be accessed off the A130.

Condition of Site/Buildings

I.29 Hedgerows Business Park is a relatively modern office based development with a small amount landscaping. The depot land is of low density and the buildings are older and some are in a poor condition.



Business

I.30 Hedgerows Business Park is dominated by B1 office use, whilst the southern section of the site is characterised by B8 storage uses. The further north section contains both a car auction and council waste and recycling vehicle storage facility.

Conclusion

I.31 This employment area provides B1 and B8 employment space as well as two car dealerships. There is an area of vacant land next to Hedgerows Business Park which has the potential to provide more employment space. The depot land provides B8 space but is of low density. The car auction site is also of low density and is well landscaped along its boundary.

I Allocated Employment Areas

Coval Wells Employment Area

I.32 Coval Wells Employment Area CMI IWZ

Area: The Coval Wells Employment Area is located within central Chelmsford, to the west of the City Centre.

Coval Wells Site



Site Area	1.51 ha
Estimated Floorspace	4,435 m²
Number of Vacant Units being marketed which may not include all actual vacant units (based on EGi data)	0

I.33 The site is located within walking distance of both Chelmsford city centre and Chelmsford Rail Station. The site provides modern BI office premises with both good road and public transport links. Both of the buildings are currently

occupied by national and international businesses.

Condition of Site/Buildings

I.34 The buildings are modern and appear to be in good condition and are set within a well maintained site.

Business

I.35 The site contains BI a purpose built offices.

Conclusion

I.36 The Coval Wells Employment Area is an example of the city centre based modern BI offices within Chelmsford. The site is situated in close proximity to Chelmsford Rail Station and City Centre and there is also a large car park, the boundary also has a mixture of young and more mature trees and vegetation. This employment area also adjoins a residential area and lies to the west of the Great Eastern Main Line.



Allocated Employment Areas I

Drakes Lane Employment Area

I.37 Drakes Lane Employment Area CM3 3BE

Area: The Drakes Lane Employment Area lies to the north of Chelmsford in a rural setting to the east of the village of Little Waltham.

Drakes Lane Site



Site Area	2.18 ha
Estimated Floorspace	4,821 m²
Number of Vacant Units being marketed which may not include all actual vacant units (based on EGi data)	2 industrial

I.38 The site lies in a rural location to the north of Chelmsford. It contains a mix of B1, B2 and B8 employment space. Due to the types of businesses using this site, areas of countryside to the north have been used as an overflow for vehicles to park and/or stored.

Condition of Site/Buildings

I.39 The buildings are in varying conditions. The site is in a poor condition and a number of the buildings are showing signs of ageing and disrepair.

Business

I.40 The site is predominantly used for B8 storage of large vehicles such as coaches and cranes. There is also a small amount of B1 and B2 employment functions operating on this site. The B1 units are small in size, with the B2 and B8 areas much more of the medium to large scale.



Conclusion

I.41 The Drakes Lane Employment Area provides B1, B2 and B8 employment space to the north of Chelmsford within the rural area. The site is used predominantly as a storage area for large vehicles which it is not ideally suited to due to its location down a B class country lane. This site has been informally laid out with parcels of land clustered around similar use types with more modern B1 and B2 units that are smaller in size closer to the road.



I Allocated Employment Areas

Dukes Park Employment Area

I.42 Dukes Park Employment Area CM2 6UA

Area: The Dukes Park Employment Area is located in north east Chelmsford.

Dukes Park Site



Site Area	27.41 ha
Estimated Floorspace	83,063 m²
Number of Vacant Units being marketed which may not include all actual vacant units (based on EGi data)	4 industrial 1 office

I.43 The site lies to the east of the A138, which provides links to the A12. The site is bounded by a large scale residential development to the south, with a well-developed landscaped boundary to distinguish the two adjacent areas.

Condition of Site/Buildings

I.44 The site was built during the 1980s and provides industrial and warehouse premises with a variety of different sizes.

Business

I.45 Most of the units operate within the B2 and B8 use classes. There is also a small amount of B1c space and a number of car dealerships. The site is split into different sub-areas which are characterised by containing units of similar use and size.

Conclusion

I.46 The Dukes Park Employment Area is one of the largest within Chelmsford and provides a large number of units. The site is of strategic importance as it is close to the A12 and as a result of this has been successful in attracting national and regional B8 storage and distribution centres. There are a number of vacant units on the site, however, but these are in relatively good condition. There does also appear to be a problem with parking on the site with on street parking on both sides of the main spine road through the site, some of the units do have dedicated car parking spaces to help negate this.



Allocated Employment Areas I

East Hanningfield Employment Area

I.47 East Hanningfield Industrial Estate Employment Area CM3 8AB

Area: The East Hanningfield Industrial Estate Employment Area lies on the southern outskirts of the village of East Hanningfield, to the south east of Chelmsford.

East Hanningfield Site



Site Area	1.23 ha
Estimated Floorspace	5,207 m²
Number of Vacant Units being marketed which may not include all actual vacant units (based on EGi data)	1 industrial

I.48 The site lies in a rural location on the southern boundary of the village of East Hanningfield. The site is compactly laid out and is bounded by residential areas to the north, east and west, with open countryside to the south.

Condition of Site/Buildings

I.49 There are a number of different sized units on the site, which vary in age and condition. It appears that a number of units at the northern end of the site are in good condition and more modern. The buildings on the southern half of the site appear to be older and not in such good condition. Access to the south of the site is restricted, preventing HGVs easy access to this section, there is also a large informal car park at the north of the site, and the road surface is poorly maintained with a number of potholes.

Business

I.50 There are a number of businesses operating from within this employment area, predominantly B2 and B8 with a small amount of B1c. The site is used primarily by small firms operating within the local area, as the majority of units are single storey and small to medium in size.



Conclusion

I.51 The East Hanningfield Industrial Estate Employment Area would appear to be a small, successful site operating within a rural area. The site provides small sized units suitably located for businesses within the local area, as well as an alternative to Chelmsford employment areas. The modern buildings at the north of the site suggest that the site is viable and has undergone recent investment.



I Allocated Employment Areas

Eastern Industrial Estate Employment Area

I.52 Eastern Industrial Estate Employment Area, South Woodham Ferrers CM3 5UG/UH/UQ

Area: The Eastern Industrial Estate Employment Area is located within the east of South Woodham Ferrers, to the south east of Chelmsford.

Eastern Industrial Site



Site Area	7.10 ha
Estimated Floorspace	21,977.41 m²
Number of Vacant Units being marketed which may not include all actual vacant units (based on EGi data)	2 industrial

I.53 The site is located on the eastern edge of the town, just off the Saltcoats Roundabout. The south of the site is bordered by the London to Southminster railway line, which separates the site from the Saltcoats Industrial Estate. To the north and



west of the site there is a residential area with similar architecture to the employment area and to the east there is open countryside.

Condition of Site/Buildings

I.54 The buildings are generally well maintained although a number appear to be showing signs of ageing.

Business

I.55 The site is predominantly used for B2 and B8 employment uses along with the adjacent Saltcoats employment area. The units appear to vary in size across the site, with small to medium employment space.



Conclusion

I.56 The Eastern Industrial Estate Employment Area is one of three sites within South Woodham Ferrers. Some of the buildings are now showing signs of ageing and the site shows a number of vehicles parking on the street suggesting that the amount of parking provided is inadequate. The site is split into smaller sub areas each characterised architecturally, size and employment use. There is also B1 employment space within this employment area indicating a shift in employment type within this site.



Allocated Employment Areas I

Eastwood House Employment Area

I.57 Eastwood House Employment Area CMI IQW

Area: The Eastwood House Employment Area lies to the north west of Chelmsford City Centre within walking distance of both Chelmsford Rail Station and the City Centre.

Eastwood House Site



Site Area	1.48 ha
Estimated Floorspace	5,353.00 m²
Number of Vacant Units being marketed which may not include all actual vacant units (based on EGi data)	0 industrial 1 office

I.58 The site lies close in proximity to Chelmsford Rail and bus stations, and within the City's West End. The site is bounded by residential to the north and to the west is bounded by a mix of office and residential space. The New Street Marconi employment area which forms the eastern boundary of the site is undergoing a residential-led redevelopment.

Condition of Site/Buildings

I.59 The site contains modern BI office space built in the 1990s within landscaped grounds and with a private large surface car park. The buildings and grounds are in very good condition.



Business

I.60 There are a number of businesses operating from within this BI office use development but there is currently vacant space within this site.

Conclusion

I.61 The Eastwood House Employment Area provides modern BI use employment space with close proximity to Chelmsford City Centre, rail and bus stations. The site will have improved access into the City Centre with the redevelopment of the industrial site to the east, as well as opportunity for expansion.



I Allocated Employment Areas

Eckersley Road/Kingsdale Employment Area

I.62 Eckersley Road/Kingsdale Employment Area CMI ISL

Area: The Eckersley Road/Kingsdale Employment Area lies within Chelmsford to the north east of the City Centre.

Eckersley Road/Kingsdale Site



Site Area	1.27 ha
Estimated Floorspace	4,222.79 m²
Number of Vacant Units being marketed which may not include all actual vacant units (based on EGi data)	6 industrial 1 office

I.63 The site is made up of two separate employment areas accessed off Victoria Road (A1099) to the south. Both are well established and provide an employment area with close proximity to Chelmsford City Centre and rail station. To the east the site is bounded by a retail park and to the west Royal Mail depot which has planning permission for a supermarket.

Condition of Site/Buildings

I.64 The site is in good condition and units are well maintained. The buildings are small industrial/warehouse units that are primarily used for B1 and B8 uses. The Kingsdale site has a central car park with an adequate amount of parking spaces, the Eckersley Road units do also have spaces but this is limited to 1 per unit.

Business

I.65 The Eckersley Road section of the site is predominantly made up of small B1c and B8 units and there is one gymnasium (D2). The Kingsdale section of the site contains medium sized units that are more modern than Eckersley Road and provide predominantly B1 and B8 space.



Conclusion

I.66 The Eckersley Road/Kingsdale Employment Area provides small/medium B1c and B8 space in a central Chelmsford location close to the City Centre and 0.4 miles from Chelmsford Rail Station. The units are in good condition and there appears to be very few vacant units on the site. Changes within this employment area have seen the loss of two units to teaching laboratories (D1), the loss of another to a dance studio (D2) and a gym (D2), whilst the creation of new B1 units following demolition of Regina House.



Allocated Employment Areas I

Essex Regiment Way Employment Area

1.67 Essex Regiment Way Employment Area CM3 3PZ

Area: The Essex Regiment Way Employment Area lies to the north of Chelmsford, in a rural setting to the south of the village of Little Waltham.

Essex Regiment Way Site



Site Area	9.10 ha
Estimated Floorspace	3,438.33 m²
Number of Vacant Units being marketed which may not include all actual vacant units (based on EGi data)	0 plots available

1.68 The site lies to the north of Chelmsford, adjacent to the A130. The site is on the outskirts of the City and lies to the north of a planned major residential development. Currently the site is used for B2 and B8 employment uses, and the site is not formally laid out. The site is also a new allocation as an employment area.

Condition of Site/Buildings

1.69 The site access road is not tarmacked and there are a small amount of buildings on the site. The buildings tend to be temporary structures or those that are industrial in nature.

Business

1.70 This employment area is dominantly made up of B2 and B8 employment uses, which are ideally suited to this location with good road links to Chelmsford and the rest of the county.

Conclusion

1.71 The Essex Regiment Way Employment Area provides a large amount of employment space in a good location on the outskirts of Chelmsford. There is a lack of this type of employment space within the Chelmsford area and the site has plenty of space for expansion. The site is well established despite only recently being allocated as an employment area.

I Allocated Employment Areas

Hoffmanns Way/Kay-Metzeler Employment Area

I.72 Hoffmanns Way/Kay-Metzeler Employment Area CMI IGU/RP/LE

Area: The Hoffmanns Way/Kay-Metzeler Employment Area lies to the north east of Chelmsford City Centre.

Hoffmanns Way/kay-Metzeler Site



Site Area	4.08 ha
Estimated Floorspace	13,305.54 m²
Number of Vacant Units being marketed which may not include all actual vacant units (based on EGi data)	0 industrial 4 office

I.73 The site lies in a central Chelmsford location to the north east of the City Centre and within walking distance of Chelmsford Rail



Station. The site can be split into two main parts to the north the Hoffmanns Way site contains small B use class premises, as well as Chelmer Mills (B2). To the south west is the Kay-Metzeler site, this is primarily used for B8 employment use operating as a large warehouse/distribution centre, with direct access onto the Great Eastern Main Line with existing railway sidings comprising the eastern section of the site.

Condition of Site/Buildings

I.74 The Hoffmanns Way site has modern smaller buildings that have their own parking and overlook the adjacent Anglia Ruskin University and the River Chelmer valley. The mill site comprises of a mixture of buildings with a number of large modern units on site. The Kay-Metzeler site is older and functional; the land to the rear which contains the railway sidings has potential for improvement with a number of outbuildings in poor condition.



Business

I.75 The employment area has a mix of employment uses with B1, B2 and B8 across the site in different areas.

Conclusion

I.76 The Hoffmanns Way/Kay-Metzeler Employment Area provides a diverse mix of employment opportunities in a central location. The distribution centre at Kay-Metzeler is used by national logistics companies and the railway sidings increase the capabilities available on this site. The Hoffmanns Way site provides modern smaller B class units in an accessible and central Chelmsford location.



Allocated Employment Areas I

Mayphil Industrial Estate Employment Area

I.77 Mayphil Industrial Estate, Battlesbridge SSI I 7Rj

Area: The Mayphil Industrial Estate employment area lies to the south of Chelmsford in the village of Battlesbridge.

Mayphil Industrial Site



Site Area	2.27 ha
Estimated Floorspace	5,554.97 m²
Number of Vacant Units being marketed which may not include all actual vacant units (based on EGi data)	0 industrial

I.78 The site lies to the south of the City's administrative area bordering the district of Rochford. The site lies within the Metropolitan Green Belt and has good road and rail links with the Battlesbridge Rail Station and the A130, A132 and A127 are located close by, providing strategic links to major regional roads.

Condition of Site/Buildings

I.79 The site is informally laid out in a linear form, a number of employment buildings, the buildings tend to be one/two storey and many appear to have been replaced and/or rebuilt recently as they appear to be modern in appearance. There is a minimal amount of landscaping on the site, however, the site overlooks open countryside and the River Crouch forms its boundary to the east and south.

Business

I.80 The site is dominated by B2 and B8 uses with varying different sizes. The site also has a number of builder's yards on the site suggesting that this site is used by a number of local businesses.



Conclusion

I.81 The Mayphil Employment Area would appear to be a successful site, with good links to the local Antiques Centre and South Essex. The site has good road and rail links and provides medium sized B2 and B8 premises to the south of the City in a rural area of Green Belt.



I Allocated Employment Areas

Navigation Road Employment Area

I.82 Navigation Road Employment Area CM2 6ND

Area: The Navigation Road Employment Area lies to the east of Chelmsford City Centre.

Navigation Road Site



Site Area	0.93 ha
Estimated Floorspace	3,985.84 m²
Number of Vacant Units being marketed which may not include all actual vacant units (based on EGi data)	0 industrial

I.83 The site lies at the junction between Navigation Road and Springfield Road to the east of the City Centre and High Street. A large part of the area has been redeveloped for residential uses over the last decade and

the remaining employment area is in relatively poor condition. Road connections to this employment area are not ideal for larger vehicles and a number of units within this area have changed uses to A and C class with the previous occupants relocating to employment areas at the rural-urban fringe of Chelmsford.

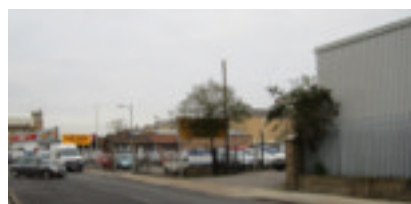
Condition of Site/Buildings

I.84 The site is in need of investment and a number of the buildings are now old and in relatively poor condition. Access roads into some of the sites restrict access to HGV/LGVs and in some places are poorly maintained.



Business

I.85 The site is predominantly used for a variety of mixed and sui generis uses. The business units that are smaller in size would appear to be occupied and in the best condition.



Conclusion

I.86 A number of the B2 and sui generis car maintenance areas appear to be successful and operating, this site provides a central location to provide such services situated close to the City Centre and a large residential area. A large amount of this site has changed uses into C class and this has significantly reduced the size of the employment area.

Allocated Employment Areas I

New London Road Employment Area

1.87 New London Road Employment Area CM2 0PP/0RF

Area: The New London Road Employment Area is located on New London Road to the south of Chelmsford City Centre; it is made up of three distinct sub-areas.

New London Road Site



Site Area	2.37 ha
Estimated Floorspace	7,931.07 m²
Number of Vacant Units being marketed which may not include all actual vacant units (based on EGi data)	0 industrial 7 office

1.88 The site lies within Chelmsford to the south of Parkway (A1060) and the City Centre. There are three areas that lie both to



the north and south of New London Road. Each area has distinct characteristics; County Place to the north is a modern B1 office development with modern landscaped offices that overlook the adjacent Essex County Cricket Ground. The two areas to the south are of higher density and contain a mix of employment buildings ranging from B1 to B2. A number of the buildings within these two sub-areas have been converted to alternative uses as a private health clinic (D1) and residential (C3).

Condition of Site/Buildings

1.89 The buildings are in varying condition with the County Place development providing modern B1 development in landscaped surroundings with private car parking. The sub-areas to the south contain older B1/B2 business space that is now less attractive.

Business

1.90 The employment area is primarily made up of B1 businesses and also has a small amount of B2 space. There is a mix of local, national and international companies within the employment area reflecting the range of buildings available for occupancy.



Conclusion

1.91 The New London Road Employment Area is a well-established site that provides employment opportunities in a central location within walking distance of the City Centre. A number of the older buildings appear to be showing signs of ageing and there is an opportunity for them to be redeveloped or refurbished to ensure the employment needs continue to be met as they change over time.

I Allocated Employment Areas

Signals Lane Employment Area

I.92 Signals Lane Industrial Estate Employment Area, Galleywood CM2 8RF

Area: The Signals Lane Industrial Estate Employment Area lies on the southern outskirts of the village of Galleywood, to the south of Chelmsford.

Signals Lane Site



Site Area	1.66 ha
Estimated Floorspace	5,226.81 m²
Number of Vacant Units being marketed which may not include all actual vacant units (based on EGi data)	2 industrial

I.93 The site lies on the edge of Galleywood to the south of Chelmsford. The site is surrounded by residential dwellings to the north, east and west and overlooks open countryside and Metropolitan Green Belt to the south. The

site is linear in its development and the site lies close to the A12. The employment area itself is made up of medium units with a number of these appearing to be currently vacant.

Condition of Site/Buildings

I.94 The buildings would appear to be well-maintained despite being of basic construction, with a number of new units located to the rear of the site. There is minimal landscaping within the site, although the perimeter boundary has well established vegetation. There is also plenty of car parking available within the site close to each unit.



Business

I.95 The site is predominantly used for B8 employment uses, with a range of units used by businesses operating within the city and the region.



Conclusion

I.96 The Signals Lane Industrial Estate provides medium sized B8 units maintained site; however, the site lies down a rural road which restricts access for HGV/LGVs despite its proximity to the A12. The site is primarily used by small/medium local businesses and provides units at the rural-urban fringe of Chelmsford.

Allocated Employment Areas I

Rivermead Employment Area

I.97 Rivermead Employment Area CMI IPD/RP

Area: The Rivermead Employment Area lies within central Chelmsford, to the north of the City Centre.

Rivermead Site



Site Area	1.54 ha
Estimated Floorspace	4,968.35 m²
Number of Vacant Units being marketed which may not include all actual vacant units (based on EGi data)	0 industrial

I.98 The site lies to the north of the city centre, Anglia Ruskin University lies to the south and west. The site is split in two with the southern section units more modern and showing less signs of ageing. The northern section is older and contains a snooker club (D class). The site also has good access into the primary road network and lies close to Chelmsford Rail Station.

Condition of Site/Buildings

I.99 The buildings are in poor condition at the northern section of the employment area with a number of them apparently vacant. The southern section of the site is in better condition with the small units used for B2 uses. There is also quality B1 office space at the site but there is only a small amount of this.

Business

I.100 The site provides small industrial units which are B1/B2 uses. There is also an MOT workshop within the site.



Conclusion

I.101 The Rivermead Employment Area provides a mix of B class space in a central Chelmsford location. The units are predominantly small in size and range in three different periods of architectural style 1950s, 1970/80s and 1990s. There does appear to be a problem with parking in the southern half of the site with an inadequate amount of spaces. The site is also bordered by the river and landscaping from the road and adjacent university.



I Allocated Employment Areas

Royal British Legion Business Park Employment Area

I.102 Royal British Legion Business Park Employment Area, Danbury CM3 4QJ

Area: The Royal British Legion Business Park Employment Area lies in the heart of the village of Danbury, to the east of Chelmsford.

Royal British Legion Site



Site Area	0.90 ha
Estimated Floorspace	769.31 m²
Number of Vacant Units being marketed which may not include all actual vacant units (based on EGi data)	0 industrial

I.103 This site lies in a semi-rural location at the heart of the village of Danbury. The employment area is surrounded by residential dwellings and is within a former quarry below the surrounding area. The buildings on the site are of basic construction, and in reasonable condition, business use on the site is primarily B1/B2 and sui generis.

Condition of Site/Buildings

I.104 The site is landscaped along the access and the perimeter, with a large number of vehicles being stored on site. The buildings are small and basic in construction and provide space for small scale engineering and MOT workshops.



Business

I.105 There are two main uses on the site including light and general industry (B1/B2) and MOT workshops (sui generis).

Conclusion

I.106 This employment area provides business space for the village of Danbury and surrounding villages it also is well used and provides small-scale units that are not available within the local vicinity.



Allocated Employment Areas I

Saltcoats Industrial Estate Employment Area

I.107 Saltcoats Industrial Estate, South Woodham Ferrers CM3 5XJ

Area: The Saltcoats Industrial Estate Employment Area lies within the eastern part of South Woodham Ferrers, to the south east of Chelmsford.

Saltcoats Industrial Site



Site Area	4.21 ha
Estimated Floorspace	13,465.02 m²
Number of Vacant Units being marketed which may not include all actual vacant units (based on EGi data)	2 industrial

I.108 The site lies to the east of South Woodham Ferrers, the site is bordered by residential and open countryside. The site itself is well enclosed by landscaping along three of its boundaries and by the London – Southminster rail line to the north.

Condition of Site/Buildings

I.109 The buildings are generally well maintained, but there does appear to be a problem with parking on the site as there is a large amount of on street parking.



Business

I.110 The site is primarily made up of small to medium sized units built in the 1980s.

Conclusion

I.111 Saltcoats Industrial Estate Employment Area is a reflection of the business role of South Woodham Ferrers within Chelmsford's administrative area in that it is dominated by B2 and B8 uses. This employment area is one of three that lie within the town of South Woodham Ferrers.



I Allocated Employment Areas

Springfield Business Park Employment Area

I.112 Springfield Business Park Employment Area CM2 5AA/AE/AR/AS/PD

Area: The Springfield Business Park Employment Area lies to the north east of Chelmsford.

Springfield Business Park Site



Site Area	37.46 ha
Estimated Floorspace	80,486.88 m²
Number of Vacant Units being marketed which may not include all actual vacant units (based on EGi data)	6 industrial 2 office Development Opportunities

I.113 The site lies south of the Boreham Interchange, it primarily operates as a site with large premises, this is aided by the good road links as it is positioned 0.6 mile

from the A12. There is a small area of land remaining to be developed within the site and there is a small number of vacant units. The site is accessed from the A130 and is positioned adjacent to two other employment areas.

Condition of Site/Buildings

I.114 The site has a number of modern employment and warehouse buildings primarily operating at a regional and national level.

Business

I.115 The site is dominated by B8 distribution centres operating at a regional level. The largest of these occupies a third of the site, most of the vehicles that access this site are of the HGV type and there is good road access into and out of this employment area.



Conclusion

I.116 This employment area would appear to be a successful site due to its lack of vacant units and its modern facilities providing large amounts of employment space with good transport links to the region, ports and London. The site provides predominantly B8 space along with a small amount of B1b and B1c. The units have allocated parking although a number of cars would appear to be parked on the road suggesting that the number provided is not adequate.



Allocated Employment Areas I

Temple Farm Employment Area

I.117 Temple Farm Employment Area CM2 8LA/LL/LP

Area: The Temple Farm Employment Area lies to the south of Chelmsford, with a rural setting south of the A12, it also includes the area known as Temple Wood.

Temple Farm Site



Site Area	21.65 ha
Estimated Floorspace	1,288.92 m²
Number of Vacant Units being marketed which may not include all actual vacant units (based on EGi data)	0 industrial

I.118 The site is a newly designated employment area which lies within the Metropolitan Green Belt to the south of Chelmsford. It is an informally laid out site that is split between Temple Wood and Temple Farm. The site is dominated by B2, B8 and sui generis employment

types.

Condition of Site/Buildings

I.119 The general condition of this site and buildings is poor, and the City Council has supported plans for its redevelopment.

Business

I.120 The site is dominated by B2, B8 and sui generis uses and this is informally laid out. The business that dominates the site is the storage of motor vehicles which relies on needing a large amount of floorspace.

Conclusion

I.121 The Temple Farm Employment Area provides a large amount of employment floorspace, with good road links to the A12. It is currently dominated by vehicle storage and breakers yards. The site has recently been purchased as an employment area that will require the construction of new buildings which will house printing presses and associated warehousing and office uses.

I Allocated Employment Areas

Waltham Road Employment Area

I.122 Waltham Road Employment Area CM3 3AW

Area: The Waltham Road employment area is located within Boreham to the north of Chelmsford.

Waltham Road Site



Site Area	1.95 ha
Estimated Floorspace	4,018.09 m²
Number of Vacant Units being marketed which may not include all actual vacant units (based on EGi data)	1 industrial

I.123 The employment area lies adjacent to the A12, but can only be accessed via Waltham Road located to the north east of the site. Within this employment area the units are mixed in size and use. Over the last 10 years the changes within this employment area have all seen extensions to existing structures resulting in larger units and greater employment opportunities.

Condition of Site/Buildings

I.124 The buildings on the site are mixed in size and scale; however, some appear to be in need of refurbishment. The site also appears to be encroaching into the countryside to the north of the site with vehicles informally parking on the verge.



Business

I.125 The site is dominated by industrial businesses (B2), specialising in both concrete, cement and recycling. There does also appear to be vacant office units on the site that are in a state of disrepair.

Conclusion

I.126 This employment area provides a mix of smaller office space and larger warehouse/workshop space. The site itself is in a rural location and is generally in poor condition although there are modern buildings on the site which are in use and are in good condition.



Allocated Employment Areas I

Waterhouse Lane Employment Area

I.127 Waterhouse Lane Employment Area CMI 2QE/QU/QX/UP

Area: The Waterhouse Lane Employment Area lies to the south west of Chelmsford City Centre and also comprises Cromar Way and e2v.

Waterhouse Lane Site



Site Area	16.23 ha
Estimated Floorspace	30,639.44 m²
Number of Vacant Units being marketed which may not include all actual vacant units (based on EGi data)	0 industrial

I.128 The site lies to the east of Waterhouse Lane in the south west of Chelmsford. The employment area is made up of distinct sub areas each characterised by building size and use type. The most northern part of the site is operated by e2v for B1, B2 and B8 uses. The

southern half of the site contains modern units of small, medium and large size which are also B1, B2 and B8 uses.

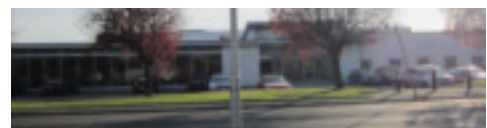
Condition of Site/Buildings

I.129 The buildings to the north of the site are older but some have undergone refurbishment and the site is of both national and international importance. The buildings to the south are modern and in good condition with the site and roads well maintained with only a small number of vacant units.



Business

I.130 Within the site there is A1, B1, B2 and B8 uses as well as a number of car showrooms which fall under the category of sui generis.



Conclusion

I.131 The Waterhouse Lane Employment Area is a successful site, with good transport links to both the A12, Chelmsford and Chelmsford Rail Station. The modern units in Cromar Way and Waterhouse Business Centre are the most popular and this site is well maintained with only a small number of vacant premises. The e2v site is considered a strategically important site for the local economy as it provides highly specialised employment to the City and region.



I Allocated Employment Areas

Western Industrial Estate Employment Area

I.132 Western Industrial Estate Employment Area, South Woodham Ferrers CM3 5ZA

Area: The Western Industrial Estate Employment Area lies to the west of South Woodham Ferrers, to the south east of Chelmsford.

Western Industrial Estate Site



Site Area	3.92 ha
Estimated Floor Space	12,540.37 m²
Number of Vacant Units being marketed which may not include all actual vacant units (based on EGi data)	4 industrial

I.133 The site lies within the western edge of South Woodham Ferrers, it is bordered by the London to Southminster railway line to the north and residential dwellings to the east and south. The site lies close to South Woodham Ferrers Rail station and has a mix of different employment uses within it, which appear to

agglomerate together in separate sub areas within this employment area with units in each areas characterised by size and type.

Condition of Site/Buildings

I.134 There are a number of buildings within the site, all of the same age, built in the 1980s. These would appear to be in good condition and the site is generally well maintained.

Business

I.135 BI, B2, B8 and sui generis units are distributed across the site, with a number of car dealerships occupying land within the employment area.



Conclusion

I.136 The Western Industrial Estate Employment Area would appear to be a successful site, with a wide variety of employment uses. The site occupies a good location in terms of road and rail links and it is likely that this has contributed to the success and viability of this location, with the majority of the units occupied. There is also parking available with each unit, although on street parking is visible within the site, suggesting that the amount of parking provided is inadequate.



Allocated Employment Areas I

Widford Employment Area

I.137 Widford Employment Area CMI 3AA/AE/AF/AG/AR CMI 3BG/BH/BQ/BY

Area: The Widford Employment Area is located in the south west of Chelmsford; it is formed of two areas known as Widford and Westway.

Widford Site



Site Area	34.30 ha
Estimated Floor Space	110,189.12 m²
Number of Vacant Units being marketed which may not include all actual vacant units (based on EGi data)	4 industrial

I.138 The site lies on the south western edge of the defined settlement boundary of Chelmsford. The site lies on the A1016 and is 0.9 miles north of the junction with the A414. The site is split with Widford to the west and Westway to the east of the A1016. The western edge of

the Widford site borders the Metropolitan Green Belt.

Condition of Site/Buildings

I.139 The site has buildings of varying ages and sizes and this is different across both sub areas. The Widford site contains buildings built from the 1960s onwards; these tend to be in good condition although a number of them are now showing signs of their age. The buildings on the Westway side are in relatively good condition.



Business

I.140 Most of the site is dominated by B2 and B8 uses. The employment area is one of the largest in Chelmsford and there is a low level of vacancies.



Conclusion

I.141 The Widford Employment Area is a strategically placed site close to both the A12 and M25 with units of varying sizes capable of providing storage and distribution depots. Although the majority of the site is occupied there are a number of vacant units and recently a number of these have been lost to alternative uses including retail (A1) and a gymnastics club (D2). There is also a limited amount of parking available within this employment area and there is on street parking but this does not appear to be a problem in terms of congestion.



2 Employment Area Tables

Appendix 2 Employment Area Tables

Table 19 Key Employment Area Analysis (2)

Employment Area	Potential gain through planning permission (m²)	Potential loss through planning permission (m²)	Potential net gain/loss through planning permission (m²)
BAE Systems, Great Baddow	0	1,300	-1,300
Banters Lane, Great Leighs	1,372	0	1,372
Beehive Lane	49	559	-510
Chelmsford Business Park	18,641	610	18,031
Church Street, Great Baddow	0	1,722	-1,722
Colchester Road	512	0	512
Coval Wells	0	0	Nil
Drakes Lane	257	0	257
Dukes Park	693	5,338	-4,645
East Hanningfield Industrial	676	0	676
Eastern Industrial, SWF	905	1,269	-364
Eastwood House	0	0	Nil
Eckersley Road/Kingsdale	650	452	198
Essex Regiment Way	6,007	0	6,007
Hoffmanns Way/Kay-Metzeler	730	0	730
Mayphil Industrial, Battlesbridge	3,577	0	3,577
Navigation Road	0	201	-201
New London Road	0	4,480	-4,480
Rignals Lane	14	0	14
Rivermead	0	78	-78
Royal British Legion, Danbury	64	0	64
Saltcoats Industrial, SWF	265	0	265

Employment Area Tables 2

Employment Area	Potential gain through planning permission (m ²)	Potential loss through planning permission (m ²)	Potential net gain/loss through planning permission (m ²)
Springfield Business Park	17,072	7	17,065
Temple Farm	75,452	0	75,452
Waltham Road Industrial	479	0	479
Waterhouse Lane	8,347	710	7,637
Western Industrial, SWF	435	342	93
Widford	3,820	4,058	-238
Total	140,016	21,126	118,890
Use Class	Potential gain through planning permission (m ²)	Potential loss through planning permission (m ²)	Potential net gain/loss through planning permission (m ²)
B1 Business	21,883	8,740	13,143
B2 General Industrial	1,173	2,049	-876
B8 Storage or distribution	27,470	3,779	23,691
Flexible Use B1/B2/B8	89,490	6,558	82,932
Total	140,016	21,126	118,890

Source: Chelmsford City Council (2013)

Table 20 Employment Area Floorspace

Employment Area	Total Floorspace (m ²)	Site Area (ha)
BAE Systems, Great Baddow	1,243 18,675	4.62
Banthers Lane, Great Leighs	2,912	1.14
Beehive Lane	4,814	1.93

2 Employment Area Tables

Employment Area	Total Floorspace (m ²)	Site Area (ha)
Chelmsford Business Park	17,319	16.30
Church Street, Great Baddow	6,805	2.25
Colchester Road	17,539	16.47
Coval Wells	4,435	1.51
Drakes Lane	4,821	2.18
Dukes Park	83,063	27.41
East Hanningfield	5,207	1.23
Eastern Industrial, South Woodham Ferrers	21,977	7.10
Eastwood House	5,353	1.48
Eckersley Road/Kingsdale	4,223	1.27
Essex Regiment Way	3,438	9.10
Hoffmanns Way/Kay-Metzeler	13,306	4.08
Mayphil Industrial, Battlesbridge	5,555	2.27
Navigation Road	3,986	0.93
New London Road	7,931	2.37
Rignals Lane	5,227	1.66
Rivermead	4,968	1.54
Royal British Legion, Danbury	769	0.90
Saltcoats Industrial, South Woodham Ferrers	13,465	4.21
Springfield Business Park	80,487	37.46
Temple Farm	1,289	21.65
Waltham Road	4,018	1.95
Waterhouse Lane	30,639	16.23
Western Industrial, South Woodham Ferrers	12,540	3.92
Widford	110,189	34.30

Source: Chelmsford City Council (2013)

Non-Allocated Tables 3

Appendix 3 Non-Allocated Tables

Table 21 Key Non-allocated Analysis (2)

Parish	Potential gain through planning permission (m ²)	Potential loss through planning permission (m ²)	Potential net gain/loss through planning permission (m ²)
Bicknacre & Woodham Ferrers	7,528	1,444	6,084
Boreham	5,655	800	4,855
Broomfield	4,424	776	3,648
Chignall	1,077	0	1,077
Danbury	4,179	1,428	2,751
East Hanningfield	9,302	146	9,156
Galleywood	5,175	2,704	2,471
Good Easter	0	0	Nil
Great & Little Leighs	2,545	65	2,480
Great Baddow	3,515	2,864	651
Great Waltham	3,251	281	2,970
Highwood	3,257	344	2,913
Little Baddow	3,372	0	3,372
Little Waltham	2,915	313	2,602
Margaretting	3,549	0	3,549
Mashbury	0	0	Nil
Pleshey	375	705	-330
Rettendon	4,058	497	3,561
Roxwell	6,857	0	6,857
Runwell	1,991	0	1,991
Sandon	1,545	207	1,338
South Hanningfield	4,677	7,125	-2,448

3 Non-Allocated Tables

Parish	Potential gain through planning permission (m ²)	Potential loss through planning permission (m ²)	Potential net gain/loss through planning permission (m ²)
South Woodham Ferrers	222	363	-141
Springfield	13,226	700	12,526
Stock	2,430	36	2,394
West Hanningfield	5,982	0	5,982
Writtle	16,104	1,006	15,098
Total	117,211	21,555	95,656
Use Class	Potential gain through planning permission (m ²)	Potential loss through planning permission (m ²)	Potential net gain/loss through planning permission (m ²)
B1 Business	24,481	10,420	14,061
B2 General Industrial	6,403	7,784	-1,381
B8 Storage or distribution	51,705	2,803	48,902
Flexible Use B1/B2/B8	34,622	548	34,074
Total	117,211	21,555	95,656

Source: Chelmsford City Council (2013)

Appendix 4 Quality of Environment Matrix

Quality of Environment Analysis Matrix							
Existing Allocated Employment Sites	Distance to Major Roads	Distance to Major Rail	Public Transport Access	Site Accessibility	Parking	Conflicting/Bad Neighbour	Condition of Buildings
BAE Systems, Great Baddow	The site lies to the west of the A1114, junction 17 of the A12 and the A130 are 1.4 miles to the south of the site via A1114.	4.1 miles to Chelmsford Rail Station	Service 40 bus runs between BAE Systems - Chelmsford - Broomfield Hospital every 30 mins	Direct road access onto West Hanningfield Road	Car Parks provided	Residential	Mixture of old and modern brick built buildings.
Banters Lane Employment Area, Great Leighs	The site lies 0.1 mile to the south of the A131 and 2.9 miles to the south of the A120.	8.1 miles to Chelmsford Rail Station, 3.8 miles to Braintree Rail Station	Service 70/70X bus runs between Chelmsford - Braintree - Colchester every 20 mins	Direct road access onto Banters Lane/Main Road	Car Parking provided	Agricultural/ Residential	Modern industrial buildings and office building.
Beehive Lane Employment Areas	The site lies to the east and west of the B1009, the Army and Navy Roundabout is 0.5 mile to the north west and provides links into Chelmsford along the A1060, A1114 and A138. The A1114 is 1.7 miles to the south east of the site and junction 17 of the A12 is 2.2 miles to the south east.	2.1 miles to Chelmsford Rail Station	Service 45 bus runs between Oxney Green - Moulsham Lodge every 20 mins, Service 41/51 Galleywood-Chelmsford-Chignall Estate every 15 mins, Service 31 Chelmsford-Danbury-Maldon every 30 mins, Service 36 Chelmsford-Danbury-South Woodham Ferrers every 30 mins	Restricted HGV access	On Street Parking	Residential	Small industrial units.
Chelmsford Business Park	The site lies to the south east of the A130, junction 19 of the A12 is 0.9 mile to the north east.	3.4 miles to Chelmsford Rail Station	Service 47 bus runs between Chelmsford-Beaulieu Park-Broomfield Hospital every 30 mins, Service 71A/71/71X Chelmsford-Witham-Colchester every 30 mins	Direct road access onto B1137	Car Parks provided	Commercial	Modern office buildings.
Church Street Employment Areas	The site lies to the west of the A1114, junction 17 of the A12 and the A130 are 1.1 miles to the south of the site via A1114.	3.7 miles to Chelmsford Rail Station	Service 40 bus runs between BAE Systems - Chelmsford - Broomfield Hospital every 30 mins	Restricted HGV access	Informal car parking	Residential	Smaller sized units in good to reasonable condition
Colchester Road Employment Areas	The site lies to the south of the A138 and the north of the A130, junction 19 of the A12 via the A130 is 0.8 mile to the north east.	3.5 miles to Chelmsford Rail Station	Service 47 bus runs between Chelmsford-Beaulieu Park-Broomfield Hospital every 30 mins, Service 71A/71/71X runs between Chelmsford-Witham-Colchester every 30 mins	Direct road access onto B1137	Car Parks provided	Commercial	Mixture of office and large warehouse units
Coval Wells	The site lies to the south of the A1060 adjacent to the carriageway, the A1016 is 0.2 mile to the west of the site.	0.6 mile to Chelmsford Rail Station	No bus services but site lies 0.5 mile from the Bus/Rail Interchange	Direct road access onto A1060	Car Parking provided	Residential	Modern office buildings.
Drakes Lane Employment Area	The site lies 1.5 miles to the west of the A130, 2.3 miles to the south east of the A131 and 4.2 miles to the north of the A12.	5.5 miles to Chelmsford Rail Station	No bus services	Rural B road (Drakes Lane) restricts access	Car Parking on land opposite	Agricultural	Appear to be showing signs of age

Dukes Park Employment Area	The site lies to the east of the A138, and is 0.5 mile to the south east of the B1137, and a further 0.9 mile south of the A130. Junction 19 of the A12 is 2.3 miles to the north of the site.	3.0 miles to Chelmsford Rail Station	Service 47 bus runs between Chelmsford-Beaulieu Park-Broomfield Hospital every 30 mins, Service 72 Chelmsford-Chelmer Village (Peak Hours Only), Service 73 Chelmsford-Hatfield Peverel-Maldon infrequent, Service 71A/71/71X Chelmsford-Witham-Colchester every 30 mins	Direct road access onto A138 to the west and Cuton Hall Lane to the east	On Street Parking	Commercial	Large and small commercial units.
East Hanningfield Industrial Estate	The site lies to the east of the A130, it is 2.8 miles south of junction 17 of the A12, A1114 and the A130, the A132 is 4.3 miles to the south.	7.0 miles to Chelmsford Rail Station, 4.5 miles to Battlesbridge Rail Station	Service 1 bus runs between Chelmsford-Canvey Island infrequent, Service 3 Chelmsford-Rayleigh-Southend on Sea every 60 mins	Rural B road (Old Church Road) restricts access	Car Parking provided	Agricultural/ Residential	Modern small units.
Eastern Industrial Estate, SWF	The site lies 1.5 miles east of the A132 and 4.0 miles east from the A130.	1.1 miles to South Woodham Ferrers Rail Station	Service 36 bus runs between Chelmsford-Danbury-South Woodham Ferrers every 30 mins	Road access onto Hamberts Road/Ferrers Road/B1012	Car parking/on street parking	Residential	Modern small and medium sized units
Eastwood House	The site lies 0.1 mile to the south east of the A1016.	0.6 mile to Chelmsford Rail Station	No bus services	Direct road access onto Glebe Road/A1016	Car Parking provided	Residential	Modern office buildings.
Eckersley Road/Kingsdale Employment Area	The site lies to the north of the A1099 adjacent to the carriageway, it is 0.7 mile north east of the A1060.	1.6 miles to Chelmsford Rail Station	No bus services	Direct road access onto Victoria Road/A1099	A mixture of On Street Parking/Car Parks	Retail	Smaller commercial units.
Essex Regiment Way Employment Area	The site lies to the east of the A130 adjacent to the carriageway, it is 2.8 miles to the north west of junction 19 of the A12 and 0.8 mile north of the A1016. The A131 is 2.0 miles to the north of the site via A130.	3.3 miles to Chelmsford Rail Station	Chelmer Valley Park and Ride main car park lies 0.6 mile to the north - via A130	Direct road access onto A130	Informal car parking	Agricultural	Large agricultural storage buildings
Hoffmanns Way/Kay-Metzeler Employment Areas	The site lies 0.3 mile to the east of the A1016 and 0.4 mile to the north of the A1099.	1.1 miles to Chelmsford Rail Station	Chelmer Valley Park and Ride serves Anglia Ruskin University which lies adjacent to the site	Direct road access onto B1008	On Street Parking	Residential	A mixture of older and modern small sized units
Mayphil Industrial Estate, Battlesbridge	The site lies to the east of the A130, the A132 and A130 are 0.6 mile to the north, the A127 is 3.1 miles to the south via A1245.	0.1 mile to Battlesbridge Rail Station	Service 3 runs between Chelmsford-Rayleigh-Southend on Sea every 60 mins	Direct road access onto Hawk Hill	Informal car parking on site	Agricultural	Older units and builders yards.
Navigation Road Employment Area	The site lies to the east of the A1099 and 0.4 mile to the north east of the A1060.	1.7 miles to Chelmsford Rail Station	Service 47 bus runs between Chelmsford-Beaulieu Park-Broomfield Hospital every 30 mins, Service 54/56 North Melbourne-Chelmsford-Beaulieu Park every 15 mins	Direct road access onto Springfield Road/A1099	On Street Parking	Residential	Older units.

New London Road Employment Area	The site lies to the south west of the A1060, 0.8 mile to the north east of the A1114.	1.1 miles to Chelmsford Rail Station	Service 42/42A runs between Galleywood-Chelmsford-Broomfield Hospital/Stansted Airport every 12 mins, Service 100 Chelmsford-Billericay-Basildon-Lakeside every 15 mins, Service 351 Chelmsford-Ingatstone-Brentwood every 60 mins	Direct road access onto B1007	Car Parking provided	Commercial	Renovated office buildings.
Signals Lane Industrial Estate	The site lies 1.5 miles to the north east of junction 16 of the A12, and 2.9 miles to the south east of the A1114 which provides links across Chelmsford.	4.1 miles to Chelmsford Rail Station	No bus services	Rural B road (Signals Lane) restricts access	Car parking available outside units	Agricultural/ Residential	Tired looking storage units
Rivermead Employment Area	The site lies 0.4 mile to the east of the A1016 and 0.4 mile to the north of the A1099.	1.1 miles to Chelmsford Rail Station	Chelmer Valley Park and Ride serves Anglia Ruskin University which lies adjacent to the site	Restricted HGV access	Informal car parking	University/ Employment Area	Buildings look worn in the northern section but modern in the southern half.
Royal British Legion Business Park, Danbury	The site lies to the north of the A414, junction 18 of the A12 can be accessed via the A414 2.6 miles to the west. Maldon is 5.8 miles to the east and can be similarly accessed along the A414.	6.5 miles to Chelmsford Rail Station	Service 31/31X bus runs between Chelmsford -Danbury- Maldon/Burnham every 30 mins	Direct road access onto A414	Large informal car park	Residential	Small commercial units.
Saltcoats Industrial Estate, SWF	The site lies 1.6 miles east of the A132 and 4.1 miles east from the A130.	1.4 miles to South Woodham Ferrers Rail Station	Service 36 bus runs between Chelmsford-Danbury-South Woodham Ferrers every 30 mins	One way system with road access onto Cutlers Road/Ferrers Road	On Street Parking	Residential	Modern small and medium sized units
Springfield Business Park	The site lies to the west of the A12, 0.6 mile from junction 19 of the A12 and 0.6 mile from the A130 and A138.	4.4 miles to Chelmsford Rail Station	Service 71A/71/71X bus runs between Chelmsford-Witham-Colchester every 30 mins	Direct road access onto A130	On Street Parking/Car Parks provided	Commercial	Modern Industrial buildings.
Temple Farm Employment Area	The site lies to the south of the A12, it is 0.5 mile to junction 16 of the A12 and 2.6 miles to the A414 via A12 junction 15.	5.4 miles to Chelmsford Rail Station	Service 100 bus runs between Chelmsford - Billericay-Basildon- Lakeside every 15 mins	Direct road access onto B1007	Large amount of informal parking on verge	Agricultural Metropolitan Green Belt	Modern office buildings.
Waltham Road Industrial Estate, Boreham	The site lies to the north of the A12 adjacent to the carriageway, it is 1.8 miles north of junction 19 of the A12, and the same distance from the A130 and A138.	6.1 miles to Chelmsford Rail Station	Service 71/71A/71X bus runs between Chelmsford-Witham-Colchester every 30 mins, Service 73 Chelmsford-Hatfield Peverel-Maldon infrequent	Direct road access onto Waltham Road	Large amount of informal parking on verge	Agricultural/ Residential	Mixture of poorly maintained office/industrial units.

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5 Use Classes Order

Appendix 5 Use Classes Order

- **A1 Shops** - Shops, retail warehouses, hairdressers, undertakers, travel and ticket agencies, post offices (but not sorting offices), pet shops, sandwich bars, showrooms, domestic hire shops, dry cleaners, funeral directors and internet cafes.
- **A2 Financial and professional services** - Financial services such as banks and building societies, professional services (other than health and medical services) including estate and employment agencies and betting offices.
- **A3 Restaurants and cafés** - The sale of food and drink for consumption on the premises - restaurants, snack bars and cafes.
- **A4 Drinking establishments** - Public houses, wine bars or other drinking establishments (but not night clubs).
- **A5 Hot food takeaways** - For the sale of hot food for consumption off the premises.
- **B1 Business** - Offices (other than those that fall within A2), research and development of products and processes, light industry appropriate in a residential area.
- **B2 General industrial** - Use for industrial process other than one falling within class B1 (excluding incineration purposes, chemical treatment or landfill or hazardous waste).
- **B8 Storage or distribution** - This class includes open air storage.
- **C1 Hotels** - Hotels, boarding and guest houses where no significant element of care is provided (excludes hostels).
- **C2 Residential institutions** - Residential care homes, hospitals, nursing homes, boarding schools, residential colleges and training centres.
- **C2A Secure Residential Institution** - Use for a provision of secure residential accommodation, including use as a prison, young offenders institution, detention centre, secure training centre, custody centre, short term holding centre, secure hospital, secure local authority accommodation or use as a military barracks.
- **C3 Dwellinghouses**
- **D1 Non-residential institutions** - Clinics, health centres, crèches, day nurseries, day centres, schools, art galleries (other than for sale or hire), museums, libraries, halls, places of worship, church halls, law court. Non residential education and training centres.
- **D2 Assembly and leisure** - Cinemas, music and concert halls, bingo and dance halls (but not night clubs), swimming baths, skating rinks, gymnasiums or area for indoor or outdoor sports and recreations (except for motor sports, or where firearms are used).
- **Sui Generis** - Certain uses do not fall within any use class and are considered 'sui generis'. Such uses include: theatres, houses in multiple occupation, hostels providing no significant element of care, scrap yards, petrol filling stations and shops selling and/or displaying motor vehicles, retail warehouse clubs, nightclubs, launderettes, taxi businesses, amusement centres and casinos.

Rural Employment Sites 6

Appendix 6 Rural Employment Sites

Ash Tree Farm

This site lies to the west of Chelmsford, within the village of Boyton Cross to the north of the village of Roxwell. There are a number of businesses operating on the site ranging from office and administration (B1a) to car body repairs and mechanical engineering (B1c/B2). (Figure 9)

Figure 9Boyton Hall Farm

This site lies to the west of Chelmsford, on the outskirts of the village of Roxwell. There are 17 business units on the site, which can be used for B1, B2 or B8 uses, these have been converted from redundant farm and agricultural buildings. (Figure 10)

Figure 10**Figure 11**Brock Farm

This site lies to the south of Chelmsford on the outskirts of the village of Stock. The farm yard comprises a number of units for business use. (Figure 11)

Little Boyton Hall Farm**Figure 12**

This site lies to the west of Chelmsford, on the outskirts of the village of Roxwell, 5 miles from the City Centre. A number of different businesses operate from within this site, ranging from offices (B1) to light manufacturing (B1c). (Figure 12)

Figure 13Muggeridge Farm

This site lies to the south east of Chelmsford, within the settlement of Battlesbridge. The farm forms part of the the Battlesbridge Antiques Centre and provides units for small businesses and land for camping and caravans. (Figure 13)

6 Rural Employment Sites

Old Park Farm

This site lies to the north west of Chelmsford, on the outskirts of the villages of Ford End and Pleshey in a rural location close to the City Council's administrative boundary. The farm and agricultural buildings have been granted planning permission for B1 business use and form part of a rural business centre. (Figure 14)

Figure 14



Figure 15

Phillows Farm



This site lies to the east of Chelmsford, in a rural location to the west of Little Baddow and south of Boreham. There are a small number of Class B business units on the site, and part of the farm is used as a caravan park. (Figure 15)

Figure 16



Rawlings Farm

This site lies to the south of Chelmsford, to the south of the settlement of Rettendon, and lies in a rural location 7 miles from Chelmsford. The site comprises a number of units for business use ranging from furniture upholstery (B1c) to vehicle storage (B8). (Figure 16)

Figure 17

Reeds Farm



This site lies to the west of Chelmsford, on the outskirts of the village of Writtle in a rural location 1.5 miles from Chelmsford. The site provides units, offices and containers for B1 and B8 uses as well as sustaining sui generis uses on the site. The estate has not been allocated as an employment area but it is well-established and would appear to be popular with a small number of vacant units. (Figure 17)

Figure 18

Runwell Hall Farm



This site lies to the south of Chelmsford, and to the south east of the village of South Hanningfield in a rural location, 8 miles from Chelmsford. The site provides a number of small sized units for business use. (Figure 18)

Figure 19



Warner's Farm

This site lies to the north of Chelmsford, and the north of the settlement of Howe Street in a rural location 6 miles from Chelmsford City Centre. The site provides units for a number of business uses predominantly B1, B8 and sui generis. (Figure 19)

Rural Employment Sites 6

Figure 20Warren Estate

This site lies to the west of Chelmsford, to the north of the village of Writtle, it is 2 miles from Chelmsford City Centre. There are a number of units, across the B Classes, primarily in B1 and B8 uses including software development, wholesale nurseries, estate agents and equipment storage. (Figure 20)

Whitbreads Farm

This site lies to the north of Chelmsford, and north east of the village of Chatham Green in a rural location, 6 miles from the centre of Chelmsford. The farm is a centre for the Essex Young Farmers and a number of the farm buildings have been converted into high quality B1 office space which forms the Whitbreads Business Centre. (Figure 21)

Figure 21**Figure 22**White House Farm

This site lies to the south of Chelmsford, to the north of the settlement of Rettendon Place. The site lies in a rural location 8 miles from the centre of Chelmsford. The site provides a number of business units including an antiques centre. (Figure 22)

Glossary of Terms

Glossary of Terms

Allocated Land/Sites - Land which is defined in the development plan as being acceptable in principle for development for a particular purpose and which is not already in use for that purpose.

Area Action Plan - A plan for a specific area of the city with specific needs such as regeneration or conservation. It has the status of a Development Plan Document.

Conservation Areas - Areas of special architectural or historic interest, the character or appearance of which it is desirable to preserve or enhance. Such areas are designated by Local Planning Authorities under the Town and Country Planning Acts.

Core Strategy - This is short for Core Strategy and Development Control Policies DPD. This is a plan which sets out the long-term spatial vision for the city, along with the spatial objectives and strategic policies to deliver that vision.

Density of employment/buildings - Relates to the number of jobs or floorspace per hectare on a site.

Department for Communities and Local Government (DCLG) - A national government department which sets policy on supporting local government, communities and neighbourhoods, regeneration, housing, planning, building and the environment and fire protection. It replaced the Office of the Deputy Prime Minister (ODPM) in 2006.

Development Plan Document (DPD) - Spatial planning documents that form the development plan for Chelmsford City Council.

East of England - The counties of Bedfordshire, Cambridgeshire, Essex, Hertfordshire, Norfolk and Suffolk and the unitary areas of Luton, Peterborough, Southend and Thurrock.

Economically Active - people that are in employment, either employees or self employed, and those that are unemployed of working age (over 16) and who are looking and available to start work. They represent the total potential workforce in an area.

Employment Areas - Existing areas of land where employment in the “B” Use Classes is the primary use, such as industrial estates. It excludes town centres.

Employment Land - This is land specifically allocated for future employment use. Employment can mean a range of commercial development including offices, warehouses and industrial premises.

Employment Land Review (ELR) - A study assessing the supply and demand for employment land within the area. Allows local authorities to assess their portfolio of employment land/sites and make recommendations for future land requirements in the Local Plan.

Evidence Base - The body of documents, research and information that assists in the identification of issues and options, supports and informs the drafting and justification of Local Plan policies and helps to facilitate the monitoring of policy implementation.

Floorspace - All the area enclosed by the exterior walls of a building, both finished and unfinished, including indoor parking facilities, basements, hallways, lobbies, stairways, and elevator shafts.

Glossary of Terms

Grade A Office Space - New high quality office space in a desirable location, not previously occupied.

Green Belt - Area of land, largely rural in character, which is adjacent to the main urban areas and which is protected from development by permanent and severe restrictions on building. The emphasis is on restricting the sprawl of urban centres, preventing the coalescence of neighbouring towns and preserving the individual character of settlements, although Green Belts may also provide suitable locations for recreational development and act as a buffer between the most rural countryside and the pressure of growing towns.

Greenfield - Land on which no development has previously taken place unless the previous development was for agriculture or forestry purposes or, the remains of any structure or activity have blended into the landscape.

Gross Domestic Product (GDP) - An estimation of the monetary value of the total output of production of all goods and services after the estimated income from foreign inward investment has been deducted.

Gross Value Added (GVA) - An indicator of economic prosperity. It measures the contribution to the economy of each individual producer, industry or sector. It is based on the difference between the value of goods and services produced and the cost of raw materials and other inputs that are used in production.

Hectare - A measurement of area equivalent to 10,000m², or 2.47 acres.

Inward Investment - The injection of money from an external source into an area or region, in order for a business to locate in, or develop its presence in, that location.

Local Development Framework (LDF) - The collection of Development Plan Documents (DPDs) and Supplementary Planning Documents (SPDs) setting out the overall planning strategy, policies and proposals for Chelmsford City.

Local Plan – New planning legislation in 2012 requires authorities to prepare a single ‘Local Plan’ to replace Development Plan Documents. However, until adopted documents are reviewed, the Council shall continue to refer to them as DPDs and SPDs.

Local Planning Authority - The public authority whose duty it is to carry out specific planning functions for a particular area.

Localism Act - The Localism Act has devolved greater powers to local government and neighbourhoods and given local communities more rights and powers over decisions about housing. It also includes reforms to make the planning system more democratic and more effective.

National Planning Policy Framework (NPPF) - A document setting out the Government’s national planning requirements, policies and objectives. It replaces much of the national advice previously contained within Planning Policy Statements, Planning Policy Guidance and Circulars. The NPPF is a material consideration in the preparation of Local Development Documents, and when considering planning applications.

Plan Period - The period of time covered by the plan. The current plan period for Chelmsford City Council's administrative area is 2001 to 2021.

Glossary of Terms

Previously Developed Land (PDL) - Land which is or was occupied by a permanent structure, including the curtilage of the developed land and any associated fixed surface infrastructure. This excludes: land that is or has been occupied by agricultural or forestry buildings; land that has been developed for minerals extraction or waste disposal by landfill purposes where provision for restoration has been made through development control procedures; land in built-up areas such as private residential gardens, parks, recreation grounds and allotments; and land that was previously-developed but where the remains of the permanent structure or fixed surface structure have blended into the landscape in the process of time.

Supplementary Planning Document (SPD) - Documents which add further detail to the policies in the Local Plan. They can be used to provide further guidance for development on specific sites, or on particular issues, such as design. Supplementary planning documents are capable of being a material consideration in planning decisions but are not part of the development plan.

Standard Industrial Classification (SIC) - Classifies businesses by type of economic activity. This allows for statistical analysis and comparison.

Sustainable Development - Development which meets the needs of the present without compromising the ability of future generations to meet their own needs. One of the core principles underpinning planning.

Workforce - The total number of residents in a given area aged 16 or over who are employed, unemployed or on a Government training scheme. It excludes those who are retired.

Working Age - Includes males and females aged 16 to 64.

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