



EMPLOYMENT LAND REVIEW UPDATE

For **Swale Borough Council**



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Stantec UK Limited

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Executive Summary

- i. This Addendum updates the 2018 Swale Employment Land Review (ELR) and is needed because the 2018 evidence was prepared prior to the recent macro-economic ‘shocks’ that have led to major structural changes in employment and business habits - and significant changes to the planning system and guidance as they relate to the economy and employment.
- ii. To ensure the employment evidence that will underpin the draft Local Plan Review is soundly based on robust and up to date data, it is necessary to consider the latest economic forecast and plan monitoring data, including the supply of land, to check if the findings and recommendations in the 2018 ELR remain appropriate.
- iii. This update also takes 2022 as the base year and extends the assessment period to 2040.
- iv. The key national policy guidance changes affecting the economy add importance to the needs of storage and distribution operations, reflecting the growing role played by the sector in the wider economy, both the need for provision of ‘last mile’ facilities and (sub) regional logistics and distribution.
- v. For benchmarking purposes, it is relevant to note the scale of economic growth needed at neighbouring authorities Ashford and Medway, where both are planning for an additional 73 ha over their plan periods.
- vi. Attracting economic growth is important in helping to address long-term systemic shortcomings in the Borough’s existing economy, and Swale’s resident economy continues to perform comparatively poorly, with a high proportion of residents out-commuting to higher paid jobs elsewhere, and a general under-supply of jobs in the Borough relative to the size of the workforce. The strongest sectors locally are manufacturing, transport/storage sectors and construction. It is also the case that the sectors that support office job – professional services and administrative support – have grown, but this has not translated into office floorspace growth, most likely because of increased home working. More job opportunities closer to home would be likely to reduce what are currently comparatively high levels of out-commuting.
- vii. The property market assessment analyses market trends and market sentiment based on standard indicators and discussions with market professionals. Since the previous assessment demand in the general industrial market has got stronger and what little new build development that has occurred in the Borough has been insufficient to keep pace with demand even though rents have risen sharply, and yields fallen below 5%. The tight supply has been most notable in Sittingbourne where the majority of existing industrial stock is found, and demand is highest.
- viii. As with the general industrial market, the strategic distribution market has got stronger since the last assessment, albeit since the peak in the pandemic this has cooled a little. Space is being occupied by a range of sectors (mostly retail and 3PLs, but also

manufacturing, freight and wholesalers). Even though there is space available at G Park, Sheerness, there is such a tight supply that there remains a large supply deficit.

- ix. The previous assessment's conclusions on the office market remain the same now; the availability of office space remains low, but the market is comparatively small and remains broadly in balance. Rents are still insufficient to stimulate viable development and the focus should remain on the refurbishment of existing stock and providing good quality industrial/hybrid space, which can be used flexibly by office or light industrial occupiers.
- x. In market terms life sciences is an expanding sector, albeit the majority of growth remains around the 'golden triangle'. The life sciences offer at the Kent Science Park is comparatively small and does not have the infrastructure in terms of a university research and development offer, nor does it have adequate transport infrastructure. Recent activity points to organic growth rather than being able to draw in large footloose requirements. We support the aspiration to continue to expand the life sciences offer at the Science Park through extending or intensify activity at the site. This is because life sciences would deliver growth in higher value jobs in the Borough, addressing the current imbalance and this would also be likely to reduce out-commuting. We consider this will be difficult to achieve without a supply of space to attract inward investment. Large scale expansion remains a possible high risk, but also a high reward strategy.
- xi. The quantitative assessment of the need for employment land over the next Plan period considers two approaches – economic forecast and past trends in change in completed floorspace. The economic forecast assessment considers future job change, and past trends considers the balance between the gains and losses in employment floorspace. Both consider industrial and office demand separately, and factor in the pipeline of committed future supply, which is set against the demand to identify the need / requirement.
- xii. The demand for, and take-up of **industrial land** has been stronger and faster than was anticipated in the 2018 ELR, led by the strategic distribution market (particularly for retail and 3PLs, but also manufacturing and freight and wholesalers). The has produced a higher need figure. Thus, with strong take-up in recent years, supply is now tighter, and the requirement via the past trends in completions approach produces a higher requirement compared to that in 2018 at **73 ha – with demand of 48 ha, plus a margin of 25 ha**. Pragmatically the Council could view the 48 ha (of new land) as the minimum needed for the plan period, with the higher 73 ha requirement (inclusive of the 25 ha margin) the target to aim for.
- xiii. The requirement for offices has shifted significantly since the 2018 assessment. Both the demand and the availability of office space remain low and broadly in balance, with the market serving essentially local businesses. Rents are insufficient to stimulate viable development and the long-standing weak performance of the office market, coupled with the shock of Covid and its aftermath has pulled the assessment substantially downwards. The latest assessments of demand broadly align, suggesting the market is at equilibrium at best, but could equally see contraction. This means that **the unmet need for new**

office floorspace is just 1.1 ha; virtually no requirement. In effect our assessment is that over the Plan period office floorspace is likely to remain in quantitative terms where it is today, and what new office / hybrid space comes forward will be counter-balanced by the continued loss of outdated office premises. The focus should remain on the refurbishment of existing stock and/or providing good quality flexibly industrial/hybrid space.

- xiv. Given the changes in the office property market in recent years and changes to the growth strategy for Faversham, it is appropriate to reconsider the suitability of both sites currently allocated for office development.
- xv. The unmet industrial need – 48 ha as a minimum (or 73 ha as the aspiration) should be met by new land allocations. Netting off the land within the designated Eurolink that can meet some of the need leaves 45 ha minimum. In considering land to meet this need we have assessed sites put forward through the Call for Sites and other sites suggested by the Council. These have been evaluated for their suitability and attractiveness. An important consideration for the supply of industrial land is ensuring as much as possible is on the western side of the Borough and particularly in Sittingbourne/Isle of Sheppey where it is most needed and accessible to the Swale labour force.
- xvi. We identify only a modest number of sites with good prospects - these total 17.7 ha – enough to meet half the minimum need, and these are mostly on the western-side of the Borough. The ten ‘possibility suitable/deliverable’ sites could collectively potentially provide almost 100 ha of employment development land. We consider the Borough’s general industrial needs over the Plan period can be met from a selection of these sites.

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1 Introduction

- 1.1 This Addendum updates the 2018 Swale Employment Land Review (ELR) that identified the need for employment land over the 20-year period of the next Borough Local Plan (2016-36). The update is needed because the 2018 evidence was prepared prior to the big macro-economic 'shocks' - the UK exiting the EU, Covid 19, war in Europe and from a policy perspective - before significant changes were made to the planning system – the introduction of Use Class E and GPDO Class ZA and MA – all of which in combination have major implications for how local economies operate.
- 1.2 The 2018 ELR employment land forecasts were based on a 2017 economic forecast, and given the above-mentioned events this is now clearly out of date. To ensure the employment evidence that will underpin the draft Local Plan Review is soundly based on robust and up to date data, it is necessary to consider the latest economic forecast to see if the macro-economic 'shocks' alter the findings and recommendations of the 2018 ELR.
- 1.3 The use class and permitted development changes impact the business uses – office and light industrial, and whilst in the past the changes have led to losses in these activities, the combination of the flexibility of Use Class E and changes in how shopping is undertaken means employment uses (such as last mile and hybrid forms of services/production) can be part of the mix that repurposes surplus retail space in town centres.
- 1.4 The macro-economic events are leading to some major structural changes in how and where work activities are carried out, as well as lifestyle changes. Changes such as remote/home working and internet shopping have been in play for a number of years, but have been fast-tracked by in particular Covid 19. These changes affect economic growth, and will shift the scale and nature of demand for employment floorspace / land. In the context of all this change it is necessary for the employment evidence base to review future need for employment floorspace, and also to ensure that there is sufficient supply of land available to accommodate the identified need.
- 1.5 We also note that the Local Plan Review takes 2022 as the base year and extends the plan period to 2040 and this needs to be reflected in the evidence.

What the 2018 ELR concluded

- 1.6 The 2018 ELR reviewed both past trends and economic forecast methods of determining a land requirement, and found¹:
 - For industrial – the two assessments did not align, with past take-up stronger than the forecast approach. The economic forecast approach generated an over-supply of 27.7 ha, but this failed the property market qualitative 'sense test'. The past trends strategic warehousing scenario generating a need for 40 ha in addition to the existing supply (108 ha).

¹ Paragraphs 5.41-44 and 5.65-69

- For office - the economic forecast and past take-up approaches broadly agreed – a requirement in the order of 9-15 ha, with past trends generating the higher requirement.
- Employment proposals in rural areas should be supported, but the report did not quantify the level of need across the rural areas.

1.7 Therefore, the 2018 ELR land requirement recommendations were set on the basis of the past trends review for both industrial and office land as follows:

Figure 1.1 2018 ELR recommended land requirement

To meet future business needs this report recommends that:

- A) Up to 40ha of new land for industrial uses is allocated. This should be in the West of the Borough (Sittingbourne, Isle of Sheppey) on sites that are market attractive for larger warehouses.
- B) Up to 15 of new land for offices and light industrial uses is allocated. This should be focused to the east of the Borough in or around Faversham on one or more sites.
- C) No quantitative requirement is given for rural employment outside the main settlements (Sittingbourne, Faversham and the settlement on the Isle of Sheppey). But in line with national policy 'rural' proposals should be treated on their merits and sites should not be discounted because they may appear less sustainable than alternatives in the main towns (NPPF 2018, paragraph 84).

Source: paragraph 6.28 Swale Employment Land Review

1.8 This Addendum:

- Updates the policy background;
- Updates the Socio-economic context;
- Then updates the demand assessment:
 - past trends – reviewing the latest data to compare with the 2018 ELR;
 - labour demand – review whether the latest baseline economic forecast suggests any change from the 2018 ELR in terms of future economic prospects.
- Next it updates the property market review – a review of the patterns of activity in the office and industrial markets – what has been delivered and where, and what are the thresholds for development viability, to see whether the conclusions reached in 2018 remain sound.
- Then it updates the assessment of supply – updating those sites that have experienced change since the 2018 ELR.
- Finally, the Addendum draws together the demand and supply issues to consider if changes are needed to the policy conclusions and recommendations contained in the 2018 ELR. The key issue being whether the balance between demand and available supply has changed, but also are changes needed to respond to the Use Class and GPDO changes.

2 Planning Policy Context

Introduction

- 2.1 This section provides an update on policy and guidance changes at national, regional (GLA), and Local Planning Authority level since Swale's 2018 ELR.
- 2.2 Since then, there has been significant change to key policies including the National Planning Policy Framework, several major amendments to the General Permitted Development Order and the Use Class Order, new neighbouring Local Plans and evidence bases.
- 2.3 The key changes to policies are considered below.

National Planning Policy and Legislation

National Planning Policy Framework

- 2.4 In July 2018, a revised National Planning Policy Framework (NPPF) was published. Two further updates were made on 19th February 2019 and 20th July 2021. The revised NPPF sets out the overarching policy and objectives for the planning system in England.
- 2.5 The revisions (2018, 2019 and 2021 and indeed those currently proposed) do not change the overarching economic planning objectives, and continue to emphasise the need to support economic growth and productivity. The economic objective of the planning system remains to help build a strong, responsive and competitive economy, by ensuring that sufficient land of the right types is available in the right places and at the right time to support growth, innovation and improved productivity; and by identifying and coordinating the provision of infrastructure (paragraph 8).
- 2.6 The one significant change is the introduction in 2019 of paragraph 83 which supports storage and distribution operations, knowledge, data-driven, creative and high technology industries. Planning policies are expected to recognise and address the specific locational requirements of these different sectors.
- 2.7 Changes introduced in 2021 (paragraph 53) tighten the remit for Article 4 Directions (A4D) to remove permitted development rights. These are discussed in more detail in a later section.
- 2.8 The recognition of the needs of storage and distribution operations was long overdue, and reflects the growing role that logistics and distribution plays in the wider economy. Also noteworthy is the Government's announcement in late 2022 of a call for evidence to consider what planning and other reforms are needed to the PPG to support the freight industry.

Planning Practice Guidance

- 2.9 Revised planning practice guidance (PPG) for planning for economic needs was published in 2019. The PPG continues to acknowledge that national economic trends will not apply universally, and business needs will vary according to local circumstances and market conditions.

- 2.10 In line with the changes to the NPPF the PPG expands the planning guidance for logistics and warehousing. The revision recognises the critical role logistics and distribution play in enabling an efficient, sustainable and effective supply of goods for consumers and businesses, as well as contributing to local employment opportunities. It also points out that these uses have distinct locational requirements.
- 2.11 The guidance advises that strategic facilities serving national or regional markets are likely to require significant amounts of land, good access to strategic transport networks, sufficient power capacity and access to appropriately skilled local labour. The need can be informed by:
- Engagement with logistics developers and occupiers to understand the changing nature of requirements in terms of type, size and location including impact of new technologies;
 - Analysis of market signals, including trends in take up and availability of logistics land;
 - Analysis of economic forecasts to identify potential changes in demand and anticipated growth in sectors likely to occupy logistics facilities; and
 - Engagement with LEP.
- 2.12 Authorities will also need to assess the extent to which land and policy support is required for other forms of logistics requirements, including the needs of SMEs and of 'last mile' facilities serving local markets.

General Permitted Development Order

- 2.13 Following the introduction of Class O in 2013 that permitted change of use from office to residential, further changes were made to the General Permitted Development Order in 2020 including the introduction of Class ZA, which subject to a number of caveats, limitations and conditions, allows for the demolition of buildings used for any of the former B1 uses and replacement by residential. While the impact of the introduction of residential on transport and highways issues and on businesses are considerations, no consideration is given to the loss of employment space.
- 2.14 New Class AA allows for the construction of up to two new storeys of flats in the airspace above detached buildings in commercial use (now E class uses). Although there is unlikely to be much direct impact on employment use, the introduction of elements of residential could potentially disrupt opportunities for wholesale redevelopment, such as in out of town retail parks.
- 2.15 Most recently Class MA was introduced to allow Use Class E ('Commercial, business and service uses) including office and light industrial, to convert to residential use. The new right applies to buildings that have been vacant for at least three months prior to submission of the prior approval. This builds on the flexibility created by the introduction of the new Use Class E in September 2020 as set out below.

Use Class Order

- 2.16 The Government revised the Use Class Order in 2020, introducing a new class combining 'commercial, business and service' Use Class E. This merged office, R&D and light industrial - the B1 Use Classes with shops, commercial services,

restaurants, public houses and hot food (the A use classes) and non-residential institutions and assembly and leisure – the D Use Classes. This now means buildings can change within the above-mentioned range of uses without requiring planning permission, because they are now all in the same E Use Class.

- 2.17 Use Classes B2 (general industrial) and B8 (storage and distribution) remain unaffected by the amendments to the Use Class Order.
- 2.18 The NPPF and PPG also remain unchanged and planning authorities are still required to understand and plan for their business needs regardless of the Use Class Order amendments. Business needs are not specifically defined, but widely held to be for office, light industrial and the remaining B class uses.
- 2.19 The amendments to the Use Class are likely to have some impact on the supply of office and light industrial space given the flexibility now available to change between the wide range of uses within Use Class E. This could be positive if it encourages hybrid workspace facilities or if it introduces complementary uses such as gyms/creches, but the ability for owners to introduce non-employment uses without the need for planning permission could be problematic for light industrial in particular because this use typically commands lower rents / values compared to other E class uses.

Article 4 Directions

- 2.20 As referred to above, new GPDO Class MA introduces Use Class E to residential permitted development rights. The 2021 amendments to the NPPF (paragraph 53) indicate that the use of Article 4 Direction to remove Permitted Development Rights should, where they relate to change from non-residential use to residential use, be limited to situations where an Article 4 Direction is *necessary to avoid wholly unacceptable adverse impacts*. In all cases, Article 4 Direction must be based on robust evidence and apply to the smallest geographical area possible.
- 2.21 The revised NPPF policy is now being ‘tested’, and several councils have recently had proposed Article 4 Direction boundaries reduced substantially by DLUHC who argue that proposals did not take a “*sufficiently targeted approach*”. The clear steer is to identify the precise groupings of premises to include, supported by evidence that these type of premises are important in the local economy and under threat.
- 2.22 Industrial capacity can be impacted by Class E to residential PDR both directly, through the loss of light industrial and creative production uses that fall within Class E, and indirectly through the introduction of residential uses in industrial areas which can compromise the integrity or effectiveness of these locations in accommodating industrial-type activities and their ability to operate on a 24-hour basis.
- 2.23 Article 4 Directions might be appropriate in circumstances where it may be difficult to rely on clause MA.2(2)(g) in the legislation, which allows LPAs to assess the impact of the introduction of the residential use.
- 2.24 For Swale PDR office to residential has not been a particular issue, but this should be kept under review to monitor if Article 4 Directions would protect the integrity of the Borough’s employment sites.

Local Planning Policy

Swale Local Plan Review

- 2.25 Since the 2018 ELR, the Council has commenced review of the current Swale Local Plan (Bearing Fruits), which was adopted in July 2017. The Local Plan Review will set out the planning framework for the Borough for the period 2022 to 2040.
- 2.26 A 2021 a Regulation 19 consultation and a further Issues and Preferred Options consultation (Regulation 18) on the Local Plan Review were undertaken. The following employment requirements for Swale were identified:
- 41 ha of B2/B8 (manufacturing/warehouse and distribution) land; and
 - 15 ha of B1 (office).
- 2.27 The review acknowledges the local economy needs to become more resilient and flexible to face the rigours of future competition and change, accelerated by recent macro-economic events, and that a broader spectrum of job creating opportunities are needed, to compliment the portfolio of traditional employment land allocations. This can be delivered through a flexible approach to secure a diversity of newly built space, and the use and reuse of existing built space may be required to meet this challenge.
- 2.28 The Issues and Preferred Options consultation seeks to identify whether the creative industries should be catered for through employment allocations, while it largely maintains the current portfolio of sites, with the renewal and intensification of existing sites in and around Sittingbourne, in particular, the Eurolink business park.
- 2.29 In terms of where the need should best be accommodated the document notes this should be close to the urban areas, the A249 is also likely to remain the focus for meeting need for larger scale distribution or industrial uses, and the existing pool of employment sites on the Isle of Sheppey will be developed for industrial purposes so that the economic benefits of infrastructure investment already made can be realised. For Faversham, support will be for new employment sites with a focus on providing flexible space that can accommodate a range of uses providing employment opportunity for the new residents in the new housing that will be provided.
- 2.30 The need for the two major strategic employment locations - the Port of Sheerness and the Kent Science Park to expand/grow is identified.

Neighbouring Local Planning Authorities

- 2.31 Since the 2018 Study, a number of neighbouring authorities have updated their Local Plans and employment evidence.

Medway Council

- 2.32 Medway are currently working on a new Local Plan, Future Medway, which will replace the 2003 Medway Local Plan. The plan will cover the period up to 2037 providing for the number of homes and jobs and supporting infrastructure. To support the Local Plan review an Employment Land Need Assessment was undertaken in 2020 jointly with Gravesham Borough Council.

- 2.33 The base forecast, after accounting for windfall and churn, identifies a requirement for 293,112 sq m of employment floorspace or 62.7 ha of additional employment land by 2040. The breakdown of the base forecast shows that the majority of this requirement is for warehouse space (B8), which requires around two-thirds of the requirement, office around a quarter and industrial space (light industrial and B2) will the remaining circa 13%.
- 2.34 The Innovation Park Medway masterplan was adopted in 2019 to deliver a high quality R&D/industrial jobs on former airfield land at Rochester Airport, to encourage a wide range of high-value technology, engineering, manufacturing and knowledge-intensive businesses.

Maidstone Borough Council

- 2.35 The Local Plan Review is currently undergoing examination. The draft spatial strategy includes commercial development need and Garden Settlement proposals.
- 2.36 An Economic Development Needs Study (EDNS) Addendum 2021 sets out the implications of recent economic and policy changes largely due to Covid-19 and Brexit and changes to the Use Class Order.
- 2.37 The EDNS forecasts employment space requirements and suggests that the 'minimum' quantum of employment floorspace set out within the Local Plan Review (Regulation 18 – Preferred Approaches), at 101,555 sq m over the period to 2037, remains reasonable and justified.
- 2.38 When compared with the latest position in terms of identified employment land supply in Maidstone Borough, allocations and extant planning permissions would provide more than sufficient employment space in quantitative terms to accommodate the Borough's objectively assessed economic needs.
- 2.39 The EDNS recommendation that the Council should identify a realistic delivery trajectory for its pipeline employment supply to better understand which sites offer the greatest prospects of accommodating employment development over the period to 2037 remains.
- 2.40 Employment provision within the two proposed garden settlements at Lidsing and Heathlands is specifically intended to support the sustainability of each new community (to reduce the need for out-commuting residents etc) and could therefore be considered to serve an economic need that extends beyond 'general market' provision.

Ashford Borough Council

- 2.41 The Ashford Local Plan 2030 was adopted in February 2019 and sets out the land that needs to be provided in the borough to accommodate new homes and jobs up to 2030. The strategic approach to employment delivery is set out in policies SP3 and SP4 to deliver 63 hectares of new employment land and a total of 11,100 jobs in the Borough between 2014-30 as evidenced in the 2016 Employment Land Review.

Canterbury City Council

- 2.42 The Draft Canterbury district Local Plan 2020 to 2045 is currently undergoing

consultation. The Plan proposes new business space within strategic development sites in the Canterbury urban area, whilst Canterbury Business Park will be the strategic focus for employment space alongside a viticulture hub.

- 2.43 New local business and commercial spaces, including flexible work-space will provide opportunities for local employment, and enhance the sustainability of the South West Canterbury SDA.
- 2.44 Canterbury Business Park is an existing employment site which has an established link to the agricultural, food and drink sectors. Policy C21 allocates the site to expand to comprise of further larger-scale commercial and business uses on a minimum of 51,400 sq m of B8 floorspace including viticulture processing and storage.

Conclusion

- 2.45 The key changes in national policy guidance are the need to consider the needs of storage and distribution operations, reflecting the growing role played by the sector in the wider economy, both the need for provision of 'last mile' facilities and (sub) regional logistics and distribution.
- 2.46 The emerging Swale Plan locational strategy for meeting general employment need is - in or close to the urban areas, along the route of the A249, in the existing employment sites on the Isle of Sheppey, and at Faversham the focus will be on providing flexible space. The needs of the two major strategic specialist employment locations - the Port of Sheerness and the Kent Science Park to expand/grow are also identified.
- 2.47 Of the neighbouring authorities Ashford and Medway propose the largest land allocations, both proposing an additional 63 ha over their plan periods.

3 The local economy

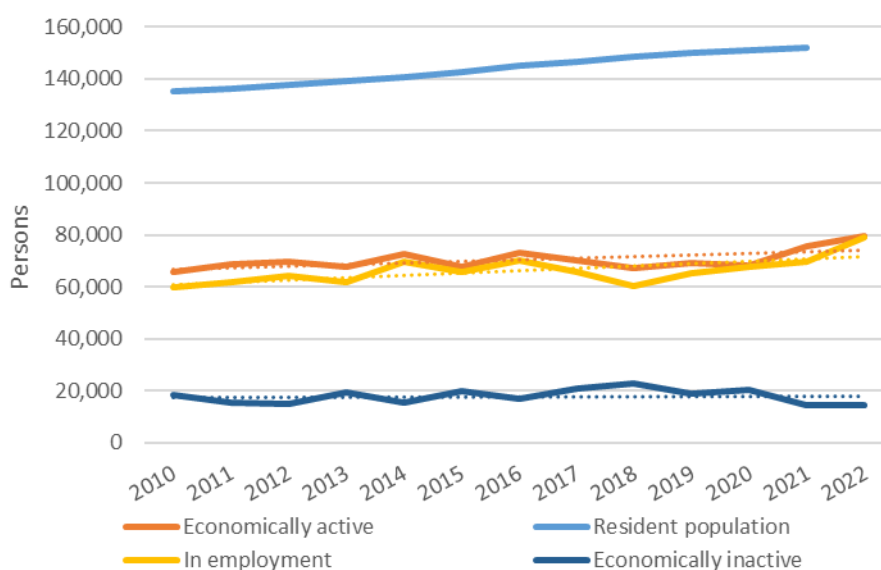
Introduction

- 3.1 This section provides an update on the socio-economic characteristics and the general economy in Swale since 2018. It widens the indicators covered and looks to identify any changes or highlight issues in the local economy that need to be considered and addressed.

Resident economy

- 3.2 Figure 3.1 identifies the total population, the economically active (those aged 16-64) and of those the number in employment, and the number aged 16-64 economically inactive.
- 3.3 The chart shows that the economically active (red line) account for broadly half the total population. However, Figure 3.1 also shows that while population has grown steadily to 152,200 in 2021 (up 12% since 2011 up from 136,300), until the recent 2021 upturn, economic activity had not grown at all over the entire decade. This is clearly because the growth in population has been those not in the labour market. It is interesting that Swale has seen a post-Covid upturn in economic activity as this is the reverse of the national trend.
- 3.4 The trend lines for economic activity (red) and for those in employment (orange line) have grown closer together, indicating fewer unemployed people. The dark blue line identifies the economically inactive in the Borough, and indicates that the level has remained largely unchanged over this period, until a dip in 2021-22 corresponding to the upturn in economic activity.

Figure 3.1 Swale – population, economic activity / inactivity

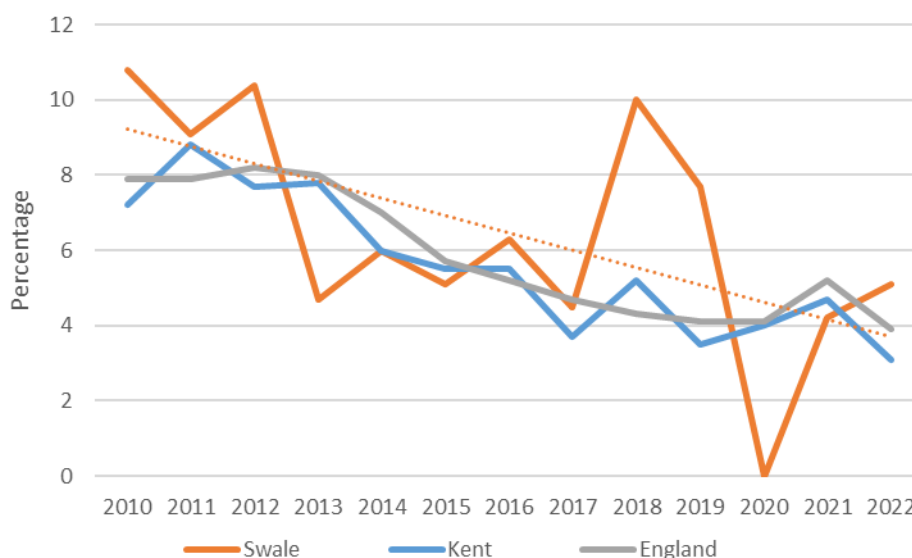


Source: ONS Population estimates, 2021 (latest data), otherwise ONS annual population survey (2022)

- 3.5 Turning to unemployment rates – which accounts for the ‘gap’ between the economically active and those in employment. Figure 3.2 below charts the downward

trend, broadly in line with county and national trends.

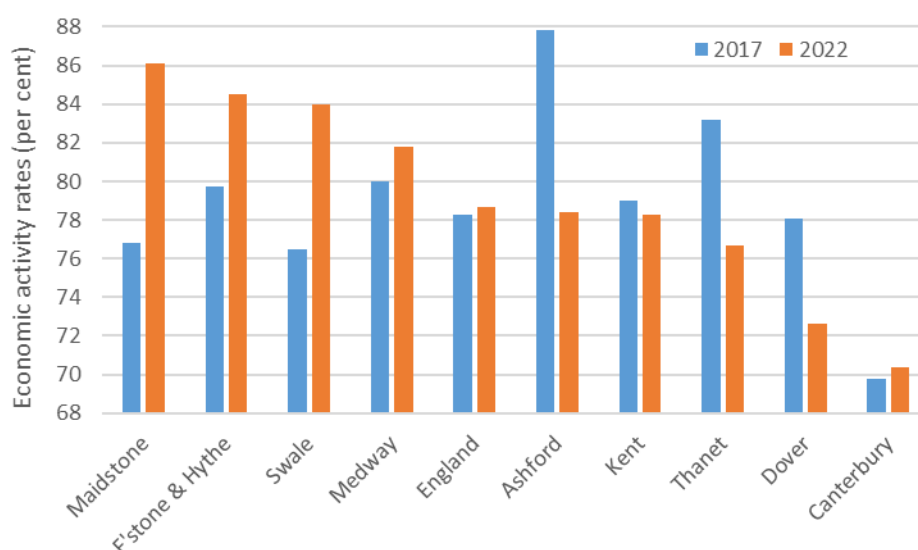
Figure 3.2 Unemployment



Source: ONS annual population survey nb the 2020 figure for the Borough is non-disclosive, hence zero on the chart.

- 3.6 Figure 3.3 below compares economic activity rates, thus the 79,700 economically active residents in Swale in 2022 as a proportion of everyone aged 16-64 represents an activity rate of 84 % (red bar). The chart ranks the boroughs, plus Kent and England for comparison by the 2022 economic activity rates, and Swale is a respectable third; a big improvement on rates in 2017. A note of caution is needed in respect of economic activity rates as the data can be ‘lumpy’. However, the data does suggest that with relatively high economic activity rates there is not much flex in the labour supply.

Figure 3.3 Economic activity rates, comparison



Source: ONS annual population survey, 2022

- 3.7 Next, we review job density, which measures the balance between total jobs in an

area and the working age population (aged 16-64). A density of 1.0 would indicate labour supply and job availability are in balance, whereas a density <1.0 indicates more workers than jobs.

- 3.8 The latest available employment density statistics are shown in Table 3.1 below, and indicate very little change compared with the data in the 2018 ELR that was 2015 data. Swale remains second bottom in the East Kent 'league table' with only Medway having a lower ratio. Again we add Kent and England into the data to benchmark. Swale lags the top performing boroughs by some distance.

Table 3.1 Jobs Density for East Kent, 2021

Area	Total jobs	Jobs density
Ashford	72,000	0.89
England	30,664,000	0.86
Canterbury	82,000	0.85
Kent	775,000	0.81
Maidstone	87,000	0.80
Folkestone and Hythe	46,000	0.71
Thanet	57,000	0.69
Dover	45,000	0.66
Swale	61,000	0.65
Medway	113,000	0.64

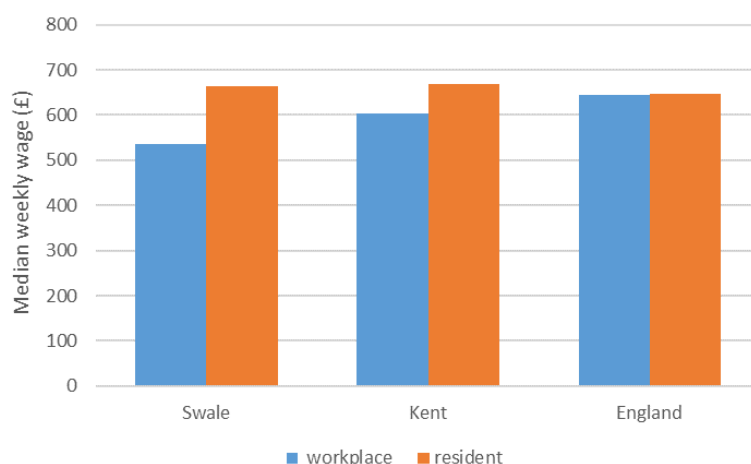
Source: ONS jobs density for 2021

- 3.9 This suggests an imbalance between the number of jobs within the district and the labour force. We identified this in the 2018 ELR, and found that 10,000 Swale residents (a large proportion) commute out for work to other parts of Kent and London made attractive by the high-speed rail connection at both Sittingbourne and Faversham. There is as yet no data to update the review of commuting, and we suspect it will remain at the relatively out commuting rate. We concluded on commuting rates in 2018 that *without a significant shift in the pattern and quality of local employment it is unlikely that the Borough could ever reduce this flow*².
- 3.10 Turning to wages, in Figure 3.4 below we compare Swale's resident-based (red band), and workplace based (blue band) wages³ with those for Kent and England shown.

² Swale Employment Land Review 2018, para 3.13

³ ONS Annual survey of hours and earnings, 2022

Figure 3.4 Wages, 2022

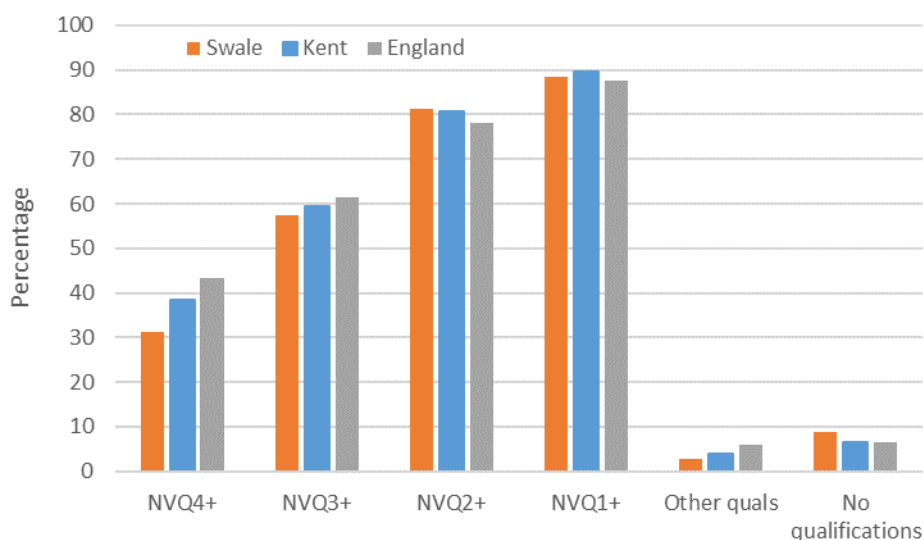


Source: ONS annual survey of hours and earnings (ASHE), 2022

- 3.11 While wages for Swale residents are the same as for the county and above those for England, as they were as recorded in the 2018 ELR (2014 data), workplace-based wages in Swale are 12% below the county average and 20% below England. This differential was highlighted in the 2018 report and remains a significant issue –the Borough remains a low-waged economy. It explains why a high number of residents commute out for work.
- 3.12 Another comparable variable is the level of qualifications within Swale compared to county and national. The 2018 ELR noted that the proportion of the workforce with skills at NVQ4 or above was 22.6%, which was well below the 33.6% for Kent at the time⁴.
- 3.13 The latest data for qualifications (2021) suggests that the skills gap has reduced significantly with 31.2% of the Swale workforce having qualifications at the more highly skilled level (NVQ4 or above), compared to 38.5% for Kent reducing the gap to 7.3% from 10% at the time of the 2018 ELR. The Borough and Kent underperform the national figure where overall 43% achieving NVQ4. At the semi-skilled level (NVQ2) Swale the highest proportion, marginally exceeding the Kent average and higher than England. In terms of unskilled/unqualified, 9% of Swale residents have no qualifications, higher than Kent and England.

⁴ ONS Annual population survey, Dec 2017

Figure 3.5 Qualifications



Source: NOMIS: ONS annual population survey (Dec 2021)

Workplace economy

- 3.14 The 2018 ELR considered job and floorspace change to 2016 as well as the workforce structure in terms of employment sectors. In this update we address the former in the assessment of economic demand in the following chapter. Here we review the sector breakdown. We also point to the review of wages above that shows how workplace wages are considerably behind resident wages.
- 3.15 Table 3.2 below identifies employee jobs in Swale by industrial sector and the proportion of each relative to the total, and then the proportions for Kent and England. The 2018 ELR identified a 2016 total workforce jobs of 59,000, and this includes the self-employed and a number of other sub-groups, and this accounts for the difference from the employee only total in the table below.

Table 3.2 Employee jobs by industry

Employee jobs by industry	Swale		Kent	England
	Employee jobs	Per cent	Per cent	Per cent
A : Agriculture, Forestry And Fishing				0.8
B : Mining And Quarrying	100	0.2	0.1	0.1
C : Manufacturing	6,000	12.2	5.6	7.1
D : Electricity, Gas, Steam And Air Conditioning Supply	125	0.3	0.3	0.4
E : Water Supply; Sewerage, Waste Management And Remediation Activities	700	1.4	1.3	0.6
F : Construction	4,000	8.1	7.8	6.1
G : Wholesale And Retail Trade; Repair Of Motor Vehicles And Motorcycles	8,000	16.2	17.0	13.2
H : Transportation And Storage	5,000	10.1	6.6	5.5
I : Accommodation And Food Service Activities	3,500	7.1	7.5	7.2
J : Information And Communication	800	1.6	2.6	4.9
K : Financial And Insurance Activities	300	0.6	2.7	3.3
L : Real Estate Activities	1,000	2.0	1.4	1.9
M : Professional, Scientific And Technical Activities	3,000	6.1	6.7	9.6
N : Administrative And Support Service Activities	4,500	9.1	9.6	8.6
O : Public Administration And Defence; Compulsory Social Security	1,750	3.6	3.8	4.2
P : Education	4,500	9.1	9.4	8.4
Q : Human Health And Social Work Activities	4,500	9.1	13.6	12.6
R : Arts, Entertainment And Recreation	700	1.4	2.1	2.8
S : Other Service Activities	800	1.6	1.9	2.6
T : Activities Of Households As Employers;...				0.2
TOTAL EMPLOYEE JOBS	49,275	100.0	100.0	100.0

Source: ONS Business Register and Employment Survey

- 3.16 The table highlights the sectors that show marked differences from the county and national figures. Unsurprisingly Swale is particularly strong in the manufacturing (C) and transport/storage (H) sectors as these are sectors that have seen new build space provided in recent years to accommodate these activities. The more office based sectors are weaker compared to the benchmarks, for finance and insurance (K) in particular, but also ICT (J) and professional services (M) more generally. Noteworthy also is the relatively low provision of health (Q) and arts (R) jobs relative to county and national benchmarks.

Business demography

- 3.17 In 2018 ELR we looked at floorspace by land use, which for both industrial and office uses had increased over the period between 2000-16, with Swale's industrial stock on a par with Medway in terms of quantum and substantially larger than other neighbouring markets. Swale's office sector in contrast is characterised as a small market, smaller than all the neighbouring markets. We update the floorspace data in

the next chapter, and here we look at the businesses— in terms of the sectors and size bands of the business demography.

- 3.18 Table 3.3 below compares the overall business unit count⁵ for Swale in number terms and also in proportions measured against county and national benchmarks.

Table 3.3 Business unit counts by size bands, 2022

Business Units	Swale (Numbers)	Swale (%)	Kent (%)	England (%)
Micro (0 To 9)	5,080	84.6	85.6	85.1
Small (10 To 49)	730	12.2	11.8	12.1
Medium (50 To 249)	175	2.9	2.3	2.5
Large (250+)	20	0.3	0.3	0.4
Total	6,005	100.0	100.0	100.0

Source: Inter Departmental Business Register (ONS)

- 3.19 The table shows the profile for Swale is generally consistent with county and national profiles, marginally less micro, but marginally more medium. The comparative small number of medium and large firms is striking, but is consistent with national trends.
- 3.20 Below Table 3.4 identifies the breakdown of total business units by industry sector.

⁵ A local unit is an individual site (for example a factory or shop) associated with an enterprise; it can also be referred to as a workplace. An enterprise is the overall business, made up of all the individual sites or workplaces.

Table 3.4 Businesses by industry sectors, 2022

Industry	Swale		Kent	England
	Employee jobs	Per cent	Per cent	Per cent
A : Agriculture, forestry and fishing	205	3.4	2.9	3.5
B : Mining and quarrying	0	0.0	0.1	0.1
C : Manufacturing	395	6.6	4.4	4.6
D : Electricity, gas, steam and air con supply	30	0.5	0.1	0.2
E : Water, sewerage, waste mngt and remed acty	45	0.7	0.5	0.4
F : Construction	1,080	18.0	15.8	12.1
G : W'sale & retail trade; repair of motor vehicles & mcycles	920	15.3	16.1	16.7
H : Transportation and storage	400	6.7	4.6	4.9
I : Accommodation and food service activities	430	7.2	6.8	6.8
J : Information and communication	255	4.2	5.8	6.8
K : Financial and insurance activities	75	1.2	2.3	2.4
L : Real estate activities	215	3.6	3.5	4.0
M : Professional, scientific and technical activities	665	11.1	14.3	14.6
N : Administrative and support service activities	480	8.0	8.9	8.7
O : Public admin & defence; compulsory social security	55	0.9	0.8	0.7
P : Education	140	2.3	2.3	2.4
Q : Human health and social work activities	285	4.7	5.1	5.0
R : Arts, entertainment and recreation	130	2.2	2.3	2.7
S : Other service activities	200	3.3	3.4	3.7
TOTAL ENTERPRISES	6,005	100	100	100

Source: Inter Departmental Business Register (ONS)

- 3.21 The largest sector is construction (F), and this is higher as a proportion that Kent and England. Swale has more business units than Kent in the agricultural sector (A) emphasising the importance of the sector to the Borough, but this is on a par with England. The number of Manufacturing (C) business units are well above Kent/England, as is transport and storage (H). We see again that the office type sectors (J-N) are all lower in proportion compared to Kent/England.

Summary

- 3.22 The resident economy continue to perform comparatively poorly, albeit there has been a marked improvement in qualifications in Swale's workforce since the 2018 ELR. The low job density indicates a high proportion of residents continue to commute outside the Borough for work. Residents who out-commute for work are as an average paid more than those whose workplace is in the Borough, and the resident workplace wage differential is much higher in Swale compared with Kent as a whole.
- 3.23 The analysis of jobs and businesses shows the continued strength of the manufacturing, transport and storage sectors, and construction sectors, and the relative under provision in the sectors that make up the office sector.
- 3.24 This analysis suggests that the focus should be on increasing employment opportunities for the semi-skilled who make up the bulk of the workforce, while also attempting to address the comparatively low waged Borough economy by providing higher waged opportunities in the Borough.

4 Property market analysis

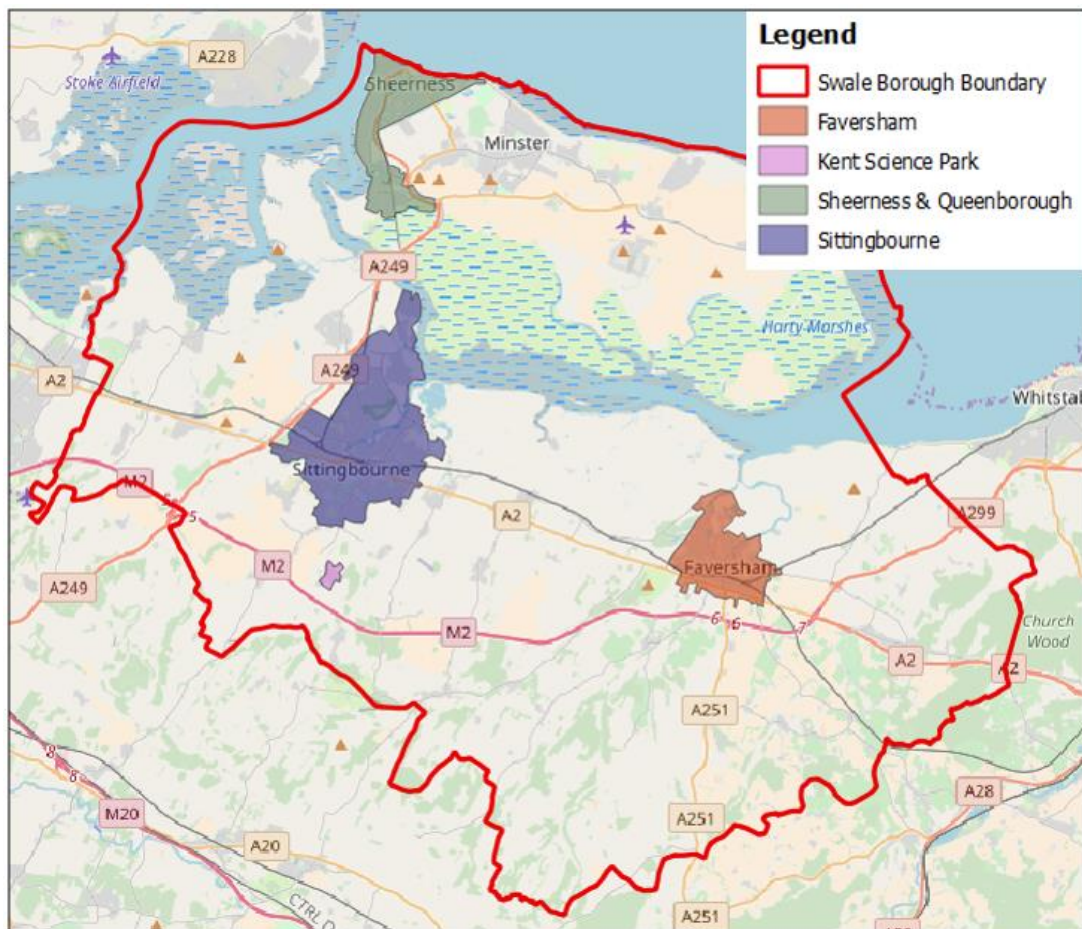
Overview

- 4.1 This chapter reviews the property market for employment space in the Borough covering office and general industrial/logistics space as well as the space found at the Kent Science Park. The chapter provides an update to the previous market assessment undertaken in the 2018 study. Where appropriate to do so, we have kept our approach the same.

Sources and definitions

- 4.2 Our property market research has drawn primarily on the following information:
- The previous assessment relied on Estates Gazette Interactive (EGi) and commercial property research reports for evidence of take-up, availability and values, both for the market overall and individual properties. Urbà no longer use Egi and have instead switched to CoStar, which is more comprehensive because CoStar actively collate data whereas EGi is reliant on agents submitting data. Using CoStar data in this update rather than EGi allows enhanced analysis.
 - In the previous assessment, it was possible to easily analyse Valuation Office Agency (VOA) data to establish the total stock figures by unit and floorspace – this assessment is no longer possible. We have therefore used the VOA data to provide an assessment of total stock on just a floorspace basis and not on a unit basis.
- 4.3 As per the previous study, our updated analysis uses the same main employment markets in the Borough as follows:
- Faversham – the extent of the urban area of Faversham.
 - Sittingbourne – the extent of the urban area of Sittingbourne. This includes; Kemsley and as far north as Ridham.
 - Sheerness/Queenborough – extent of the urban area of Sheerness and Queenborough. This includes Rushenden. The boundary of the port is included in this area, but is discussed in a separate chapter.
 - Kent Science Park (KSP) – the extent of the existing KSP site, and the planning permission for a four ha expansion.
 - Rural Swale – the rest of the Borough excluding the above geographical areas.
- 4.4 The boundaries of the above areas are shown in Figure 4-1.

Figure 4-1 Areas of analysis



Source: Ordnance Survey, Open Street Map & AspinallVerdi (2017)

- 4.5 Again, we have split the industrial analysis into the following:
- General industrial uses – including production space (factories and workshops) also small to medium-sized warehousing (E(g)(iii), B2 and B8).
 - Large-scale strategic warehousing, in units of around 9,290 sq m (100,000 sq ft) or more, typically provided as new build on specialist logistics parks (B8).
- 4.6 The only exception in not splitting out the analysis between general industrial uses and large-strategic warehousing is the assessment of supply and market balance at Borough-wide level because we cannot disaggregate the unit sizes in the VOA data. Furthermore, the previous assessment did not disaggregate the assessment therefore the approach remains consistent.
- 4.7 As with the previous assessment, we have broken down our analysis of the general and large-scale strategic warehousing into the same size bands as set out in Table 4.1 below. The purpose of this is to assist in the analysis of different levels of take-up, the amount of existing stock and availability.

Table 4.1 Industrial unit size bands

Size range sq m (sq ft)	Name
Up to 465 (5,000)	Micro
465 - 2,323 (5,001 - 25,000)	Small
2,323 - 4,645 (25,001 - 50,000)	Medium
4,645 - 9,290 (50,001 - 100,000)	Mid
+9,290 (100,000)	Large

Source: Swale Employment Land Review, August 2018

Industrial market

National context

- 4.8 The previous assessment explained that the national industrial market across both sub-sectors was considered healthy. Supply had been tightening due to improvements in the economy and some space being lost to residential. Supply was not keeping pace with demand due to a lack of new development opportunities. Speculative development was generally only occurring in ‘super prime’ areas e.g. parts of the M1 corridor, Golden Triangle, Heathrow and north of the M25. The lack of speculative development was leading to an imbalance in the market, with some occupiers having to wait for build-to-suit opportunities, or taking second-hand space or multiple units to satisfy immediate requirements. With a lack of suitable medium-sized space (e.g. 1,858 – 4,645 sq m (20,000 – 50,000 sq ft)), occupiers across the country were struggling to find suitable space to expand into. This was having a knock-on effect, with smaller units not experiencing natural levels of market churn and therefore not freeing up space for micro, SMEs and start-ups.
- 4.9 Since the 2018 assessment, we have seen changes in the strategic distribution market. Before the global pandemic, the majority of the new build market focus was strategic warehousing, which was driven by requirements from online retailers and third-party logistics companies (3PLs). As the availability of sites that could accommodate strategic warehousing in prime areas became scarce, locations that were not previously considered suitable became suitable i.e., occupiers started to follow where the sites were.
- 4.10 What we are now seeing is a slight cooling of the strategic warehouse market as online sales have fallen due to a combination of the high street re-opening, inflationary pressures on households reducing spending and occupiers growing into space they have acquired.
- 4.11 Because the focus of the industrial market has been on large units, the supply of micro to mid-size units has fallen further. Smaller units do not benefit from the economies of scale of the build costs of larger units and the type of occupiers generally are not prepared to commit to a pre-let therefore financing these is more challenging than the larger units. Due to the economies of scale for large units,

developers can also competitively bid for sites, therefore generating higher land values than small and mid-size developments. Nevertheless, demand for micro to mid-size units remains strong.

- 4.12 Overall occupiers are seeking accommodation with high levels of sustainability, in well-landscaped environments that has good access to major motorways and principal A-roads to allow easy transport of goods.

General industrial space

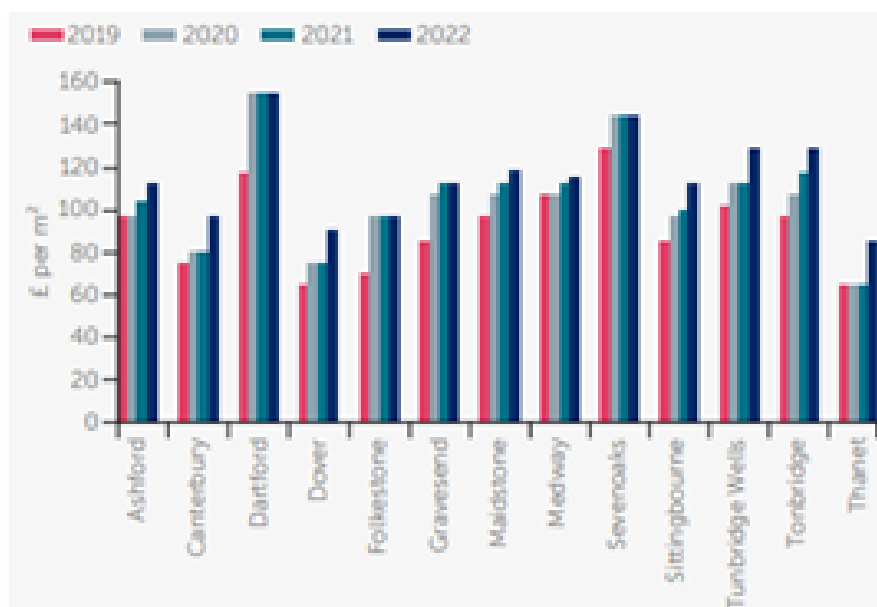
Introduction

- 4.13 The previous study stated that Swale has traditionally been considered more affordable compared to Medway and Maidstone, but in the years immediately before that study, the Borough's supply had reduced resulting in rents increasing in line with the surrounding areas. Therefore, the Borough was losing its competitive advantage of being more affordable than surrounding areas.
- 4.14 Vacancy rates were low across the Borough, and despite new sites being developed, this new space was not considered sufficient to fulfil demand throughout the plan period. The 2018 ELR recommended that new sites needed to be allocated to accommodate growth and help maintain the Borough's competitive advantage.

Swale Borough as an industrial location

- 4.15 We can see from Figure 4-2 that rents in Sittingbourne are now only slightly less than that of Medway and Maidstone therefore the Borough's competitive advantage, in its prime areas, has continued to decrease since the previous study.

Figure 4-2 Industrial and distribution rents



Source: Caxton, 2022

- 4.16 Notwithstanding the increase in rents, there is still value to be found in the Borough. As highlighted in the 2022 Kent Property Market Report "*investors are not alone in looking 'outside the box' and property developers with a lack of opportunities are*

looking at areas beyond the more established locations. Areas such as Queenborough are being looked at favourably due to the good value they offer.”⁶

- 4.17 As identified in the previous study and remains true, within the sub-regional market, some footloose occupiers will take space as and when it becomes available, rather than seek to choose one location over another. Also, the Borough still benefits from a diverse mix of ‘blue-collar’ and ‘white-collar’ employment, giving it a varied and robust economy. The wide-ranging employment sectors include:

- Advanced engineering/manufacturing
- General manufacturing
- Research and Design
- Storage
- Distribution
- Building supplies and trade counters

Demand

Overview

- 4.18 The previous assessment showed that between 2013 and 2016 the five-year annual industrial take-up averaged 20,109 sq m (216,456 sq ft) across 119 transactions. As we can see from Table 4.2, the updated take-up between 2018 and 2022 shows that the five-year annual average take-up has fallen to 15,000 sq m, but across a similar number of transactions. Therefore, we are still seeing the same number of units taken up, but the average size has fallen. This is because no large units have been taken up during this period, despite land being available at G Park, Sittingbourne for design and build opportunities. As we will see later on in this chapter in this recent past there has been significant provision on large strategic warehousing in better located areas elsewhere in Kent. Furthermore, we see from Table 4.2 that the volume of transactions fell in 2020, the first year of the global pandemic and have not recovered. But as we explore later, vacancy rates have been low, therefore, not all requirements in the market can be satisfied which has led to a fall in the take-up figures this is particularly true of the offer in the small to medium range in Faversham.

⁶ Kent County Council, Caxtons, Locate in Kent, 2022, Kent Property Market Report, page 11

Table 4.2 Swale - industrial take-up 2018-2022

Calendar year	Annual no. of transactions	Annual total floorspace take-up sq m	Min unit size sq m	Max unit size sq m
2018	36	22,958	34	4,939
2019	29	15,635	31	1,571
2020	18	8,234	94	2,199
2021	21	13,420	15	4,057
2022	19	14,768	138	3,252
Total	123	75,015		
Annual Average 2018 - 2022	25	15,003		

Source: CoStar, February 2023

4.19 We now analyse take-up on each of the industrial areas:

Faversham

4.20 The previous assessment explained that Faversham had generally seen take-up from occupiers seeking smaller units in the wider East Kent market. This reflected the type of stock the town had to offer. It was reported that take-up had slowed due to a lack of available space. As we see from Table 4.3, take-up has remained low, and as we explain later this is due to a lack of availability rather than a lack of demand. When space does become available it is occupied quickly.

Table 4.3 Faversham- industrial take-up 2018-2022

Calendar year	Annual no. of transactions	Annual total floorspace take-up sq m	Min unit size sq m	Max unit size sq m
2018	1	255	255	255
2019	0	0	0	0
2020	0	0	0	0
2021	2	590	193	397
2022	0	0	0	0
Total	3	845		
Annual Average 2018 - 2022	1	169		

Source: CoStar, February 2023

4.21 As with the previous study, demand for space remains between 93 – 280 sq m (1,000 – 3,000 sq ft), particularly those units found at the Foundry and Eurocentre developments. These are attractive, as they have access to amenities and the high office content allows occupiers to use units in flexible ways e.g., office/admin, storage, light manufacturing etc. During the period analysed in Table 4.3 Mesh Warehouse (metal mesh manufacturer) was the largest new entrant taking 397 sq m (4,269 sq ft) at 9 & 10 Foundry Business Park in March 2021.

Sittingbourne

- 4.22 The previous assessment stated that Sittingbourne was the industrial location most in demand in the Borough, and this remains the case. At the time of the previous study, it was identified that since 2013 there had been some evidence of take-up of slightly larger units of up to 4,645 sq m (50,000 sq ft), but the majority had been less than 929 sq m (10,000 sq ft). As we can see from
- 4.23 Table 4.4, the five-year annual average take-up between 2018 and 2022 has been 21 transactions.

Table 4.4 Sittingbourne- annual industrial take-up 2018-2022

Calendar year	Annual no. of transactions	Annual total floorspace take-up sq m	Min unit size sq m	Max unit size sq m
2018	29	14,737	34	4,939
2019	27	14,925	31	1,571
2020	17	7,955	94	2,199
2021	16	12,616	60	4,057
2022	16	8,133	97	2,032
Total	105	58,365		
Annual Average 2018 - 2022	21	11,673		

Source: CoStar, February 2023

- 4.24 Table 4.5 provides examples of occupiers who have taken space between 2018 and 2022. As we can see, occupiers include 3PLs, manufacturers and trade counter operators. The Unipet and Howdens transactions were lease renewals whereas the DHL is a relocation from a small unit of 2,032 sq m (21,872 sq ft). Vision Logistics was also an internal move within Sittingbourne driven by their lease coming to an end and the need to find more affordable accommodation⁷. Therefore, we see evidence that some occupiers that are currently located in the Borough will stay as long as they can find suitable space.

⁷ <https://www.visionlogistics.uk/new-sittingbourne-vision-logistics-depot-expansion/>

Table 4.5 Examples of take-up/occupiers Sittingbourne (2018 – 2022)

Transaction date	Address	Occupier	Sector	Size sq m (sq ft)
27/09/2021	Unit 1 & 2 Great Easthall Way, Trilogy Park	DHL	3PL	6,810 (73,300)
19/12/2018	Multiple units Tribune Drive, Trinity Trading Estate	Unipet International	Manufacturer of wildlife products	4,860 (52,311)
03/11/2018	Tribune Drive, Trinity Trading Estate	Howdens	Joinery/kitchen manufacturer	1,013 (10,905)
28/06/2019	Units 56 – 61 Mill Way, Trinity Trading Estate	Dulux Decorator Centre	Paint manufacturer/trade counter	357 (3,842)
24/01/2022	Units 7 & 8 D2 Trading Estate, Castle Road	Vision Logistical Solutions	Healthcare logistics	515 (5,546)

Source: CoStar, February 2023

Sheerness/Queenborough

- 4.25 The previous assessment explained that there was generally less take-up and less variety of occupiers from different sectors taking space in Sheerness/Queenborough than compared to other parts of the Borough. The towns traditionally had occupiers from heavy industries, often related to port activity. In general, the Isle of Sheppey was considered a less attractive location to occupiers than the mainland due to perceived poor connectivity, - the area seen as too far away from the motorway network, and the disruption to business continuity caused when the bridge is closed to high-sided vehicles in high winds. But agents confirmed that new space would be in demand if units were small/medium sized and offered on flexible terms at competitive rents. The characteristics of the market remain unchanged from the previous assessment.
- 4.26 As we can see from Table 4.6 there has been no take-up of space at all in recent years, this is against a backdrop of little to no supply. The space which was taken up in the calendar years 2018 and 2019 was mainly local occupiers/individuals rather than multi-nationals taking space elsewhere in the Borough.

Table 4.6 Sheerness/Queenborough- annual industrial take-up 2018-2022

Calendar year	Annual no. of transactions	Annual total floorspace take-up sq m	Min unit size sq m	Max unit size sq m
2018	6	585	47	311
2019	1	130	130	130
2020	0	0	0	0
2021	0	0	0	0
2022	0	0	0	0
Total	7	715		
Annual Average 2018 - 2022	1	143		

Source: CoStar, February 2023

Rural Swale

- 4.27 The previous assessment explained that there has been far less take-up in rural Swale than in Faversham and Sittingbourne. Agents reported that there was less market churn, as occupiers were generally local, often owning their freehold. The characteristics of the market remain unchanged from the previous assessment. As we see from Table 4.7, there have been few transactions in the rural area, with the most recent transactions occurring as space has become available at Old Rides Farm, Sheerness and Newington Industrial Estate, Newington.

Table 4.7 Rural- annual industrial take-up 2018 - 2022

Calendar year	Annual no. of transactions	Annual total floorspace take-up sq m	Min unit size sq m	Max unit size sq m
2018	0	0	0	0
2019	0	0	0	0
2020	1	279	279	279
2021	2	429	199	230
2022	5	7,398	251	3,252
Total	8	8,106		
Annual Average 2018 - 2022	2	1,621		

Source: CoStar, February 2023

Freehold (owner occupier) demand

- 4.28 The previous assessment explained that there was demand from owner-occupiers across the Borough. The demand was mainly for smaller units at schemes like Precision Park (Eurolink)/The Foundry etc., and some examples of occupiers taking larger units in developments like Eurolink. The profile of the owner-occupier market is still the same and we have seen quite a bit of activity still occurring for the micro units around Eurolink.

Supply and market balance

Overview

- 4.29 The previous 2018 assessment identified in 2017 there were 58 units available providing a total of 19,587 sq m (210,836 sq ft) of floorspace. Measured against a total floorspace stock figure of 793,392 sq m (8.54 million sq ft) the vacancy rate was 2.5%. Based on the past five-year annual take-up the available space equated to 23 months of supply, and this indicator pointed to a tight market.
- 4.30 As we can see from Table 4.8 below, since 2018 although the total industrial stock has risen by around 10% or 100,000 sq m, vacancy rates have remained below that previously reported. This is because the majority of the new space that has been constructed has attracted new entrants to the Swale market, Aldi at Sheerness being the largest, and has not released space into the general market. at the same is true at Eurolink 5 where the new stock has not freed up space elsewhere in Swale.
- 4.31 Based on the updated five-year annual take-up of 15,003 sq m (see Table 4.2Table 4.2) the current vacancy equates (Table 4.8) to just one year supply – which is a very tight market.

Table 4.8 Swale - change in total stock & vacancy rates

Date	2018	2019	2020	2021	2022
Total stock sq m 01 March	915,000	986,000	991,000	989,000	1,019,000
Change in floorspace sq m		71,000	5,000	-2,000	30,000
Change in floorspace %		7.76%	0.51%	-0.20%	3.03%
Vacancy Q.1 sq m	154	0	65	8,320	15,575
% of vacant space against total stock	0.02%	0.00%	0.01%	0.84%	1.53%

Source: CoStar, VOA, Urbā, December 2022

- 4.32 We now consider the availability of units in each of the sub areas:

Faversham

- 4.33 The previous assessment showed that there were just two units available in Faversham, but as of February 2023, there are no units currently advertised as available on CoStar. Therefore, a tight market has got even tighter.

Sittingbourne

- 4.34 The previous assessment showed that were 53 units available in Sittingbourne, the majority (43 units) of these were in the size band up to 465 sq m (5,000 sq ft) and the balance was in the next size bands of between 466 - 2,323 sq m (5,001 – 25,000 sq ft). As we can see from Table 4.9, availability has fallen significantly to just 14 units, the reduction is especially in the smaller size band, with some vacancy now occurring in the larger unit sizes. We would consider that on one hand the mix of units leads to more of a balanced market, but this is against a backdrop of tightening supply.

Table 4.9 Sittingbourne- industrial availability by unit sizes

Size range	Total no. of units	% of unit by size range
up to 465 sq m	6	43%
466 - 2,323 sq m	5	36%
2,324 - 4,645 sq m	2	14%
4,646 - 9,290 sq m	1	7%
Total	14	

Source: CoStar, February 2023

Sheerness/Queenborough

- 4.35 The previous assessment showed that there was just a single unit available in Sheerness/Queenborough and this was in the size band of up to 465 sq m (5,000 sq ft). The latest data (February 2023) shows that there are two units available of 570 and 870 sq m (6,150 and 9,400 sq ft). These units are secondary in nature compared to the better-quality stock found in Sittingbourne and Faversham. Overall, the market remains tight here.

Rural Swale

- 4.36 The previous assessment showed that there were just two units available in Rural Swale and these were in the 466 - 2,323 sq m (5,001 – 25,000 sq ft) size band. Now (February 2023), there are again two units available, and both are in the same size range as before. As with Sheerness/Queenborough, the units here are secondary in nature and again, overall, we would consider the market to be tight.

Rents, yields and the economics of development

- 4.37 The previous assessment explained that rents at the most recent development of Phase 4 of Eurolink were £78 psm (£7.25 psf), with older phases seeing rents between £70 - £75 psm (£6.50 - £7.00 psf). At Glenmore Business Park and Precision Park micro units of between 93 – 186 sq m (1,000 – 2,000 sq ft) were achieving rents of between £97 - £108 psm (£9.00 – 10.00 psf). Rents in Sheerness/Queenborough were between £32 - £54 psm (£3.00 - £5.00 psf).
- 4.38 As we can see from more recent transactions recorded on CoStar below, rents have increased::
- October 2022 – Unit 5D, Bonham Drive, Eurolink Business Park, Sittingbourne - Sign Trade Supplies took a 2,032 sq m (21,872 sq ft) unit on a new 10-year lease at a rent of £100 psm (£9.50 psf) with three month's rent free with a tenant break clause in year five.
 - July 2022 – Unit 3E, Old Rides Farm, Leysdown Road, Sheerness – an undisclosed tenant has taken a 1,384 sq m (14,900 sq ft) unit at an asking rent of £50 psm (£4.65 psf).
 - May 2022 – Unit 5, Precision Two Business Park, Eurolink 4, Sittingbourne – Octavia Infrastructure (rail infrastructure) took 270 sq m (2,900 sq ft) at a rent of £130 psm (£12.00 psf), on a five-year lease.

- September 2021- Unit 1 & 2 Great Easthall Way, Sittingbourne – DHL (3PL) took 6,800 sq m at a rent of £97 psm (£9.00 psf), on five-year lease with a 12 months' rent free.
 - May 2021 - Units 9 & 10 Foundry Business Park, Faversham - Amron Architectural (metal mesh manufacturer) took 400 sq m (4,300 sq ft) unit at an asking rent of £97 psm (£9.00 psf), on undisclosed lease terms.
- 4.39 At the time of the previous assessment, the only yield evidence was around Sittingbourne, with the report stating a yield of 6.5%. CoStar evidence shows that yields have fallen, although the only evidence is portfolio sales, rather than individual properties, these include:
- September 2021 – Trinity Trading, Sittingbourne – multi-let industrial estate of 38,200 sq m (412,000 sq ft) was sold at a net initial yield of 4.65%. The estate was 98% let at the time of sale.
 - June 2022 - 1 and 2 Eurolink, Sittingbourne – two units that total 6,600 sq m (71,000 sq ft), around 5,000 sq m (53,820 sq ft) of space was let to RTC Europe. The units were sold at a net initial yield of 3.59%.
- 4.40 We see at the above rents it is sufficient to maintain and refurbish existing stock and the higher rents combined with the yields are sufficient to stimulate speculative development.
- 4.41 With regards to capital values, the previous report stated that around Faversham these were £1,345 psm (£125 psf) and between £1,500 - £1,615 psm (£140 - £150 psf) in Sittingbourne. As we see from the CoStar evidence below capital values have not changed:
- February 2022 - Precision 2 Business Park Eurolink 4, Bingham Road, Sittingbourne - a unit of 140 sq m (1,500 sq ft) was sold at £1,580 psm (£147 psf).
 - February 2022 - Unit 2, Precision 4 Business Park, Sittingbourne – Hormozi Coffee bought a 93 sq m (1,000 sq ft) unit for £1,600 psm (£149 psf).
 - February 2021 - Unit 3, Saxon Shore Business Park, Castle Road, Sittingbourne - Wheel Class bought a 315 sq m (3,400 sq ft) unit for £1,263 psm (£117 psf).

Development opportunities

- 4.42 Currently advertised on CoStar is just the single development opportunity of Saxon 54, Trinity Trading Estate, Sittingbourne. The unit is advertised for logistic/manufacturer purposes, and will provide a total of 4,885 sq m (52,586 sq ft) in a single unit. Not currently advertised on CoStar, but also a development proposal, is Wellbrook Business Park, Queenborough. The development will provide 30 units ranging between 33 – 2,975 sq m (350 - 32,000 sq ft) and providing a total of 6,500 sq m (70,000 sq ft) of floorspace.
- 4.43 These additional developments will add a total of 11,385 sq m (122,547 sq ft) of floorspace onto the market, the equivalent of nine month's supply based on the five-year average annual take-up in Table 4.2.

Conclusion general industrial space

- 4.44 Since the previous assessment the general industrial market has got stronger and what little new build development that has occurred in the Borough has not been sufficient to keep pace with demand. Vacancy rates have fallen across the Borough, most notably in Sittingbourne where the majority of the industrial stock is found.
- 4.45 The proposed new developments will not be sufficient to ease the tightening supply. Rents have been rising to £130 psm and yields falling to below 5%, which means speculative development is viable, and we have seen that when new space has been delivered it has been taken up very quickly.
- 4.46 Overall, the market indicators show that new sites need to be allocated to meet the demand for general industrial space.

Strategic distribution

Introduction

- 4.47 The previous assessment explained that there were examples of strategic distribution occupiers taking space in the Borough, most notably with Morrisons at G-Park, Ridham and Aldi on the Isle of Sheppey. In 2018 the market attractiveness of Swale as a location was the availability of sites that could accommodate large units and the competitive pricing of land.
- 4.48 At the time, there were still several allocated sites around G-Park at Ridham which were unoccupied. It was anticipated that this available land would likely satisfy short-term demand. Agents reported that there was already occupier interest in some of the current allocations, and it was likely that these would be developed early in the plan period. If the allocations at G-Park, Ridham and Neatscourt were developed there was no other allocated land which would be able to absorb future demand. To be able to capitalise on logistics opportunities it was recommended that the Council should consider allocating land to capture demand over the medium to long term.
- 4.49 In this update, because of the strategic nature of this type of accommodation, we have looked at the wide Kent market to see what activity has been occurring in and around the Swale market.

Swale as a logistics location

- 4.50 Since the previous study, the supply of strategic warehousing space has tightened in Swale because space has been taken-up. We have seen in 2018, at Sheerness, Antolin Interiors taking a 13,800 sq m (148,500 sq ft) unit, and following their closure, Asda (retailer) took an assignment of the lease.
- 4.51 What we see from Table 4.10 is that new strategic warehouse space has been delivered across Kent, most notably in Dartford, Aylesford, Rochester and Gravesend. In these locations, we have seen “mega” sized units developed which have attracted Amazon (retailer), Ikea, (retailer) and Seacon Group (freight).
- 4.52 Between 2018 and 2022 523,000 sq m (5.6 million sq ft) of space has been taken up, the equivalent of 104,610 sq m per annum (1.1 million sq ft). Although 40% of the

floorspace was taken up in the single Amazon transaction in Dartford. Nevertheless, we have seen these developments adding significantly (the floorspace equates to 40% of total floorspace recorded on VOA for Kent) to the total floorspace industrial/warehouse floorspace across Kent. Clearly, we see when sites have been made available to accommodate large floorplates, they absorb regional demand, and take-up has been quick. Despite significant floorspace being brought forward the market remains tight with demand continuing to outstrip supply.

Table 4.10 Kent take-up strategic warehouse 2018 – 2022

Sign date	Address	Tenant	Sector	Sq m leased
30/03/2020	Unit 2 Powerhouse Drive Dartford	Amazon	Retail	213,680
25/08/2021	450 The Power House, Dartford	Ikea	Retail	41,715
11/04/2022	Unit 5, Panattoni Park Aylesford	N/a	N/a	39,930
01/01/2018	Stoke Rd, Rochester	Amazon	Retail	33,910
20/12/2018	Tower Wharf, Lower Road, Gravesend	Seacon Group	Freight	33,705
19/07/2019	Unit 20, Wares Farm, Maidstone	Berry Gardens	Fruit and vegetable wholesaler	18,605
25/07/2018	Badger Road, Chatham	CPI	Printer	15,140
22/01/2019	Dickley Lane, Maidstone	Tarkett	Flooring manufacturer	14,140
20/01/2020	Stoke Road, Rochester	Noatum Maritime	3PL	13,935
29/09/2022	Pattenden Ln, Tonbridge	Claygate Distribution	3PL	13,920
06/10/2021	Sheerness Produce Terminal, Spade Ln, Sittingbourne	Asda	Retail	13,820
25/12/2018	Station Road, Sutton at Hone, Dartford	Barrett Steel	Steel manufacturer	12,971
14/02/2019	Springhead Road, Gravesend	Berry World	3PL	12,939
23/08/2022	Crossways Commercial Park, Dartford	Albion Fine Foods	Food	12,826
26/02/2019	Lodge Rd, Tonbridge	Amethyst Group	3PL	12,111
14/05/2023	Bellingham Way, Aylesford	DHL	3PL	10,257
29/07/2022	Unit 3, Clipper Boulevard, Crossways Business Park, Dartford	Mission Produce	Food importer	9,444
Total				523,048

Source: CoStar, February 2023 Strategic warehouses are over 9,290 sq m (100,000 sq ft)

Supply and market balance

- 4.53 Analysis of availability recorded on CoStar (see Table 4.11) across Kent shows that there are just six units classified as existing i.e., built and available. Three of the units are in Dartford, two are in Thanet and one in Medway. The total existing supply is 112,516 sq m (1.2 million sq ft), or just under six months of supply based on the five-year annual take-up recorded in Table 4.10.

Table 4.11 Availability strategic warehouse 9,290 sq m plus - Kent

Address	Sq m available
Crossways 241, 241 Clipper Blvd, Dartford	22,379
The Power House Ln, Dartford	27,938
Stoke Rd, Medway	18,358
Manston Business Park, Columbus Ave, Thanet	16,724
Manston House, Columbus Ave, Thanet	16,180
DDC 160, Sandpit Rd, Dartford	10,937
Total	112,516

Source: CoStar, February 2023

Rents

- 4.54 The previous assessment reported rents of between £60 - £65 psm (£5.50 - £6 psf) for larger distribution units, albeit on limited transactional evidence. There remains limited evidence with the most recent deal recorded being the Antolin Interiors letting in 2018 (then assigned to Asda) at a rent of £65 psm (£6 psf). In the wider Kent market, we see higher rents of £130 psm (£12 psf) around Dartford whereas they fall to around £80 psm (£7.50 psf) around Gravesend and Rochester. Given the evidence in the wider market, we would anticipate new build rents in Swale to have moved on from £65 psm (£6 psf) achieved at the Antolin/Asda unit.

Yields

- 4.55 With regards to yields, there are no recent single investment sales recorded on CoStar in the Borough, but there has been activity in the wider Kent Market, which includes:
- Sept 2022 - EQT Exeter purchased the Claygate Distribution Centre in Marden, reflecting a net initial yield of 4.31%. EQT purchased the building from Claygate Distribution in a sale leaseback deal. The distribution centre comprises two units that total 13,900 sq m (150,000 sq ft) that are let to Claygate Distribution (supplier and distributor of bathroom products) on a new 20-year lease.
 - April 2021 - Kennedy World bought the 139,270 sq m (1.4 million sq ft) unit at Springhead Enterprise Park, Gravesend at a net initial yield 5.47%. The unit was let to Berry World at a rent of £80 psm (£7.55 psf).

- 4.56 At these rents combined with a pre-let to strong covenant, development is viable.

Development opportunities

- 4.57 In terms of proposed units (Table 4.12), there are six advertised, three of which are in Swale at G Park Sittingbourne. In addition, there is the development at Panattoni Park in Tonbridge and Malling there is a very large unit of circa. 70,000 sq m (753,400 sq ft) under construction – this is likely to be one of the largest speculatively built units in the country. The total proposed floorspace across these seven schemes is 205,910 sq m (2.2 million sq ft) and will add a further 10 month's supply to the wider Kent market. Although we understand a number of the units may have heads of terms out, details of which are unknown at this stage, so these may come forward on a pre-let or pre-sale basis, therefore not adding new space into the general market.

Table 4.12 Kent development opportunities strategic warehouse

Address	Sq m available
London Medway Commercial Park, Stoke Rd, Medway	42,236
Unit 2, G-Park Kent, Barge Way, Swale	19,695
Unit 1, G-Park Kent, Barge Way, Swale	40,784
Aylesford 750, Panattoni Park Aylesford, Bellingham Way, Tonbridge and Malling	69,940
Click Aylesford, Coldharbour Ln, Tonbridge and Malling	9,533
Crossways Commercial Park, Dartford	11,877
G-Park Kent, Barge Way, Swale	11,845
Total	205,910

Source: CoStar, February 2023 Strategic warehouses are over 9,290 sq m (100,000 sq ft)

Conclusion: the strategic distribution market

- 4.58 As with the general industrial market, the strategic distribution market has got stronger since the last assessment. Space is being occupied by a range of sectors (mostly retail and 3PLs, but also manufacturing, freight and wholesalers), but we are now seeing some cooling in the retail and 3PL sectors.
- 4.59 New space has been developed across Kent, most of which is in better locations than the space available at G Park, Sheerness, hence the space at G-park has not all been taken up. But due to the lack of speculatively built units in the Kent market, when the Antolin Interiors unit came back onto the market it was quickly re-occupied.
- 4.60 There are proposals for new space across Kent, but this will do little to ease the tight supply when looking over a plan period. Overall, the market indicators show that new sites need to be allocated to meet the demand for strategic distribution space.

Office market

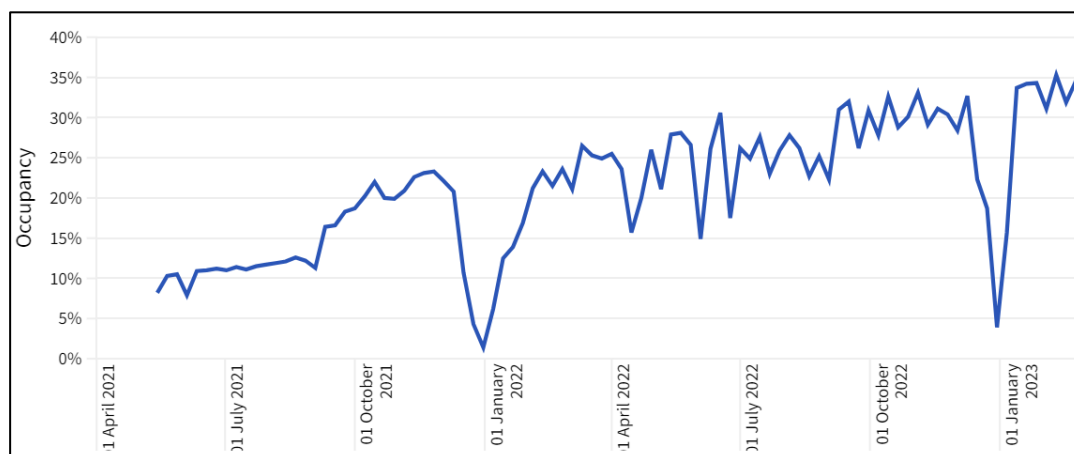
Introduction

- 4.61 The previous study identified that the availability of office space was low, but the market was broadly in balance. Rents were not sufficient to stimulate viable development, and it was recommended that the focus should be on the refurbishment of existing stock or providing good quality industrial space, which could be used flexibly by office occupiers, as was already happening.

National context

- 4.62 At the time of the previous study, new office development was viable in major towns and cities, with new development requiring pre-let in place to a blue-chip covenant.
- 4.63 Speculative office building was occurring in London and key regional centres where there was very strong office demand. Key regional centres where speculative office building occurred were in the Thames Valley and cities such as Birmingham and Manchester. The main drivers of demand for new office space were finance, professional services and Technology, Media and Telecommunications (TMTs).
- 4.64 Since the previous assessment BREXIT has occurred, but more significantly to the office market, has been the global pandemic. Covid has had a significant impact on the office market because, during the pandemic, the government encouraged working from home measures resulting in unoccupied offices or greatly reduced occupancy. Companies were forced to embrace video conferencing and other measures to ensure business continuity. The change in working practices brought forward during the pandemic is having a lasting impact with most companies allowing some form of working from home, either fully remote or hybrid (i.e. a certain number of days per week).
- 4.65 Remit research, published by CoStar (see Figure 4-3) shows that the average UK office occupancy rates are around 33%, with Tuesdays, Wednesdays and Thursdays being the busiest days, with a monthly national average of over 38.5% occupancy for these three days.

Figure 4-3 Office occupancy rates UK



Source: Remit, March 2023

- 4.66 Remit Consulting also highlight that the majority of UK organisations that participated in a four-day working week trial are continuing with it, which in turn will impact the working patterns and demand for office space.⁸
- 4.67 The change in working practices has led to many companies reassessing their real estate footprint – Carter Jonas reports that fewer occupiers are looking to expand due to uncertainties around the impact of the hybrid working model and are placing an ever-greater emphasis on smaller but higher quality space (flight to quality). This, they explain is driven by a desire to create a vibrant and attractive work environment to encourage employees back to the office and assist with recruitment, retention and productivity strategies, as well as staff health and wellbeing issues. In addition, there is a greater focus on buildings that are sustainable and energy-efficient, as occupiers try to meet increasingly ambitious Environmental, Social, and Governance (ESG) aspirations⁹. How this translates into property specification is illustrated through the International WELL Building Institute (IWBI) performance rating¹⁰ for buildings that provides an assessment of more than 30 features across seven themes:
- Indoor Air Quality
 - Water Quality Management
 - Lighting Measurement
 - Thermal Conditions
 - Acoustic Performance
 - Environmental Monitoring
 - Occupant Experience
- 4.68 With regard to sectoral demand, CBRE recently reported (see analysis in Figure 4-4) that business services had been responsible for the largest take-up of office space across their UK markets¹¹ followed by creative industries and banking and finance. As we go on to highlight below these sectors are not sectors that are attracted to Swale's office market that continues to rely on a relatively small public sector office economy.

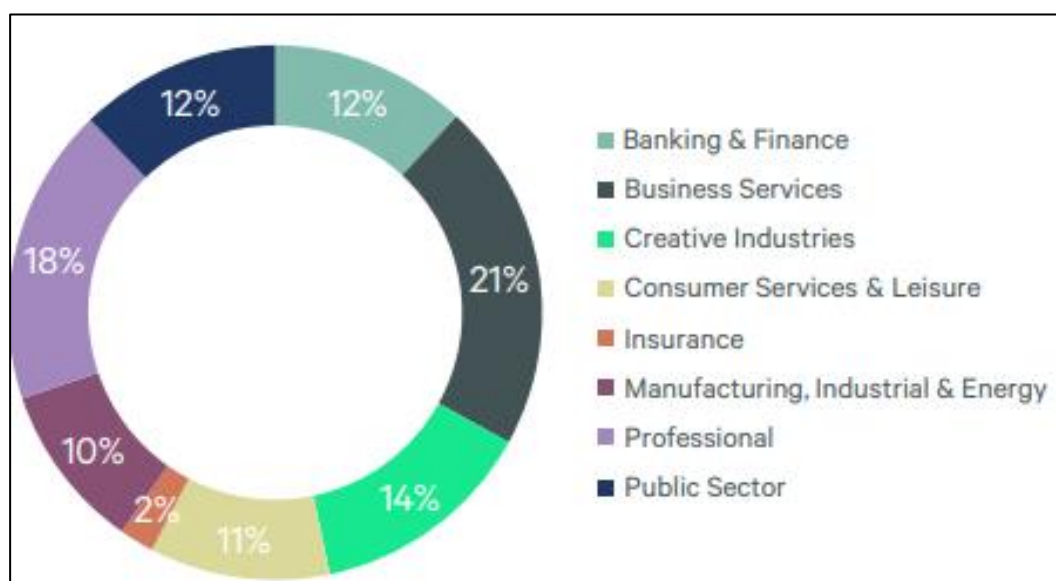
⁸ CoStar, 03 March 2023, February Has Highest Figures for Average Office Occupancy Since Pandemic Started

⁹ Carter Jonas, 31 March 2022, Commercial Market Outlook

¹⁰ <https://v2.wellcertified.com/en/performance-rating-sl/overview>

¹¹ CBRE's UK markets comprise the 10 city office markets outside of Central London: Aberdeen, Belfast, Birmingham, Bristol, Edinburgh, Glasgow, Leeds, Liverpool, Manchester and Southampton

Figure 4-4 UK office markets take-up by sector, 2022



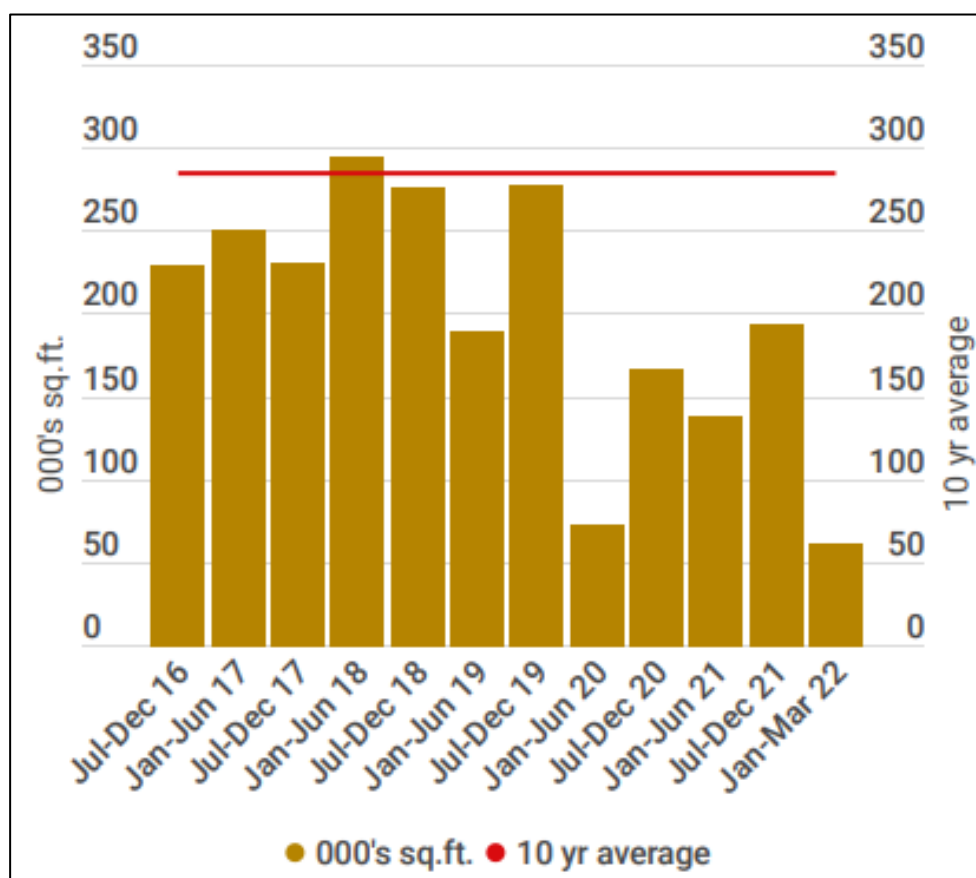
Source: CBRE UK Office Market, 12 months to end of Q4 2022

The sub-region as an office location

- 4.69 Demand for office space across the Southeast and Kent area has weakened due to the global pandemic. As illustrated in Figure 4-5, the six-monthly office take-up across the Southeast of London and Kent before the global pandemic was just below the 10-year average, since 2020 it has been significantly below the 10-year trend. Glenny's report that requirements are wholly focused on the small suite market.¹²

¹² Glenny, Q1 2022, The Databook Essex | East London | North London & Hertfordshire | Southeast London & Kent

Figure 4-5 Southeast of London and Kent - six-monthly office take-up



Source: Glenny Q1 2022

Swale Borough as an office location

- 4.70 The Swale office market remains small even in the context of Kent, which itself has a comparatively small office market. The largest occupiers found in Swale are either the public sector or occupiers located here for historic reasons.

Demand

- 4.71 As identified in the previous study and remains the case, demand for office space across the Borough is from a range of sectors with no one sector, nor location driving demand. The Borough still does not attract footloose regional or national requirements. Demand for office space in the Borough is on a small scale and tends to be from businesses already located in Swale and serving local markets.
- 4.72 We see in the analysis of take-up of office space in the Borough since 2018 (see Table 4.13), that the market is small, with the five-year annual average just being six units across a total floor area of 4,260 sq m (45,747 sq ft). This is a fall from the previous assessment, which showed a five-year annual average of nine units across a total floor area 13,000 sq m (139,974 sq ft).

Table 4.13 Swale - annual office take-up 2018 - 2022

Calendar year	Annual no. of transactions	Annual total floorspace take-up sq m	Min unit size sq m	Max unit size sq m
2018	9	1,024	19	287
2019	6	940	33	397
2020	5	764	39	397
2021	6	637	10	483
2022	6	896	19	615
Total	32	4,260		
Annual Average 2018 - 2022	6	852		

Source: CoStar, February 2023

Supply and market balance

Overview

- 4.73 The previous assessment identified that there were 14 units available providing a total of 4,562 sq m (49,102 sq ft). The vacancy was against a total floorspace figure of 75,251 sq m (810,000 sq ft). The vacancy floorspace rate was 6.1%. When we cross referenced the available space with the five-year annual take up, it equated to one year eight months' supply, and this pointed to a very low vacancy rate.
- 4.74 We can see from Table 4.14, that since the previous assessment, vacancy rates across the Borough have been low for some time. The current vacancy is less than one month's supply based on the updated five-year average annual take up in Table 4.13. Since Quarter 1 2022, the vacancy has increased to 1,901 sq m (March 2023), generating a vacancy rate of 2.04%, assuming the total stock figure has remained unchanged.
- 4.75 Normally, such low vacancy would be the trigger for new development to start, but as we have already highlighted demand for space is generally weak and we show below that rents are low and yields are high, meaning new space is not viable to develop. Thus, with availability so low we would expect to see more activity in the market, but this is not evident – demand is weak and rents flat. The reason is PDR (office to residential) losses have been responsible for closing the gap between supply and demand.

Table 4.14 Swale change in total stock & vacancy rates

Date	2018	2019	2020	2021	2022
Total stock sq m 01 March	93,000	94,000	97,000	95,000	93,000
Change in floorspace sq m		1,000	3,000	-2,000	-2,000
Change in floorspace %		1.08%	3.19%	-2.06%	-2.11%
Vacancy Q.1 sq m	0	0	0	83	39
% of vacant space against total stock	0.00%	0.00%	0.00%	0.09%	0.04%

Source: CoStar, VOA, Urbà, February 2023

- 4.76 Table 4.15 provides a breakdown of the current office availability advertised on CoStar. The majority of space currently available is in Sittingbourne with the balance of space in the rural areas. The space is secondary, with the better quality space being the Creative Community Hub, Sittingbourne. In addition, we see industrial space at Prospect Court being advertised as office space, despite its more industrial nature.

Table 4.15 Swale Borough- office availability

Address	Market area	Size sq m
Bell House, Bell Rd, Sittingbourne	Sittingbourne	1,062
The Courtyard, Parsonage Stocks Road, Faversham	Rural	52
Creative Community Hub, Stadium Way, Sittingbourne	Sittingbourne	136
Staplehurst Lodge Industrial Centre, Staplehurst Lodge, Staplehurst Road, Sittingbourne	Sittingbourne	111
Eurolink Industrial Estate, Prospect Court, West Ln, Sittingbourne	Sittingbourne	247
Wises Oast, Wises Lane, Sittingbourne	Rural	293
Total		1,901

Source: CoStar, March 2023

- 4.77 Where there is emerging supply in the Borough (not reflected in the CoStar data) is through managed workspace. The Council has proposals to refurbish Masters House, the former Council offices on Trinity Road, Sheerness for managed workspace. This will compliment Island Works coworking space in Sheerness, which opens in 2023, and has been delivered through the conversion of the Dockland Church. The church received grant funding to help convert it into coworking space. Managed workspace provides flexibility to micro businesses and small and medium enterprises because they can use the space in a flexible way and are not required to commit to a set lease term. National operators, to manage the space, generally require a minimum of 930 sq m to make the space commercially viable but smaller operators will take space at

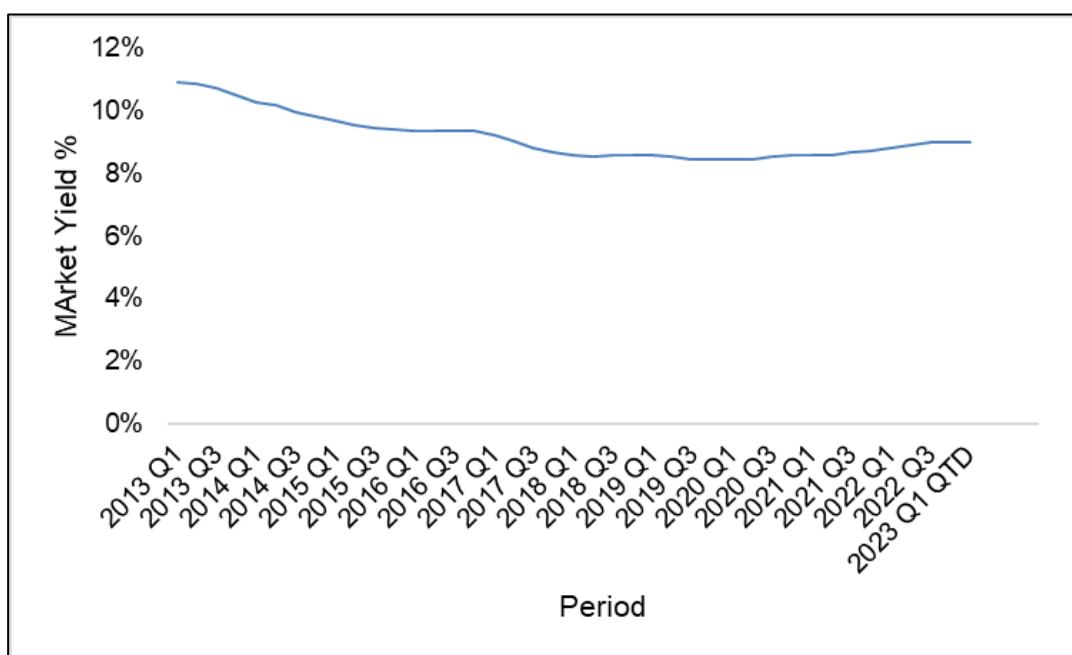
around 465 sq m. Overall, and seen in the examples in the Borough, this type of space is delivered in existing buildings because operators are not able to pay a rent to stimulate viable development.

Rents, yields and the economics of development

- 4.78 The previous assessment identified that rents for good quality second hand space ranged between £172 - £183 psm (£16.00 – £17.00 psf), and this was achieved at Conqueror Court. Elsewhere, agents reported that rents were £65 - £129 psm (£6.00 - £12.00 psf). The rents were below what was required to stimulate viable development, which at the time would need to be over £215 psm (£20.00 psf), on the basis of a pre-let on institutional lease terms to a blue-chip covenant. To enable speculative development rents would have had to have been £323 psm (£30 psf), but rents are far below this because the occupier market is weak.
- 4.79 We can see from the CoStar deals below, that rents at Conqueror Court have improved, but elsewhere rents remain the same because demand for representation is weak:
- October 2022 – Parsonage Stocks Road, Faversham - Evangelical Community Ace (church) took 19 sq m at a rent of £130 psm (£12.00 psf) on a three-year lease.
 - October 2022 – Parsonage Stocks Road, Faversham - Thor Medica (TMT) took 90 sq m at a rent of £130 psm (£12.00 psf) on a three-year lease.
 - December 2021 – 1-2 Conqueror Court, Staplehurst Road, Sittingbourne – Autaway (TMT) took 397 sq m at a rent of £323 psm (£30.00 psf) on undisclosed terms.
 - March 2020 – 1-5 Central Avenue, Sittingbourne – EKC Group (education) took 135 sq m at a rent of £88 psm (£8.20 psf) on a five-year lease.
- 4.80 There has not been any recent office investment sales recorded for Swale on CoStar, which reflects the small nature of the market and the general lack of activity. When we look at market yield (as defined by CoStar¹³) this has also generally been plateauing (see Figure 4-6) across the Borough, with CoStar reporting for quarter 1, 2023 a yield of 10.9%. The yields reported across Swale are high when we consider Knight Frank report that prime office yields in South East towns for a single let building are between 6 – 6.5% Overall, the office investment market in the Borough is weak.

¹³ CoStar defines market yield as the smoothed average yield series using modelled yields and estimates as well as actual observations.

Figure 4-6 Market yield, Swale Borough



Source: CoStar, March 2023

- 4.81 We see at the above rents it is sufficient to maintain and refurbish existing stock, but not to stimulate new development. Despite the rents at Conqueror Court being at the level which was previously reported as required to stimulate viable development, we have seen construction costs increase over this period, especially recently with global price inflation. Therefore, rents now need to be over £323 psm (£30.00 psf) to stimulate viable development.

Development opportunities

- 4.82 There are no advertised office development opportunities in the Borough, which again reflects the small and relatively weak market.

Conclusion

- 4.83 The conclusions drawn by the previous assessment remains the same now, the availability of office space remains low, but the market remains broadly in balance. Rents are still not sufficient to stimulate viable development and the focus should remain on the refurbishment of existing stock or providing good quality industrial/hybrid space, which can be used flexibly by office occupiers.

Kent Science Park

Introduction

- 4.84 The previous assessment defined the science park market, outlined what makes a good science park, provided an assessment of Discovery Park (the other large Science Park in Kent), and provided an assessment of the Kent Science Park masterplan. For this update, we do not repeat the analysis, but focus on the recent changes in the market.
- 4.85 For the Kent Science Park, the previous assessment considered two scenarios - a

business as usual scenario where growth was constrained and then a second scenario of a possible large-scale expansion of the Kent Science Park.

- 4.86 In the business as usual scenario, it was assumed that the Kent Science Park would remain constrained by the existing access. In this scenario, it was considered that the Kent Science Park would attract a mix of occupiers including those that would be associated with a science park function (e.g. biosciences) and those that would not belong (e.g. advanced manufacturing in industrial units, and professional services in office space).
- 4.87 In a large-scale expansion scenario, it was assumed that a new M2 junction would be created and a new local road network. In this scenario, it was considered questionable whether the Kent Science Park could compete with Ebbsfleet and Discovery Park for true science park activity because many competing locations could deliver new office space without the need for whole new motorway junctions. But it was identified that this level of new infrastructure could capture demand for medium and larger sized warehouse units for which there was identified demand.

Science park sector

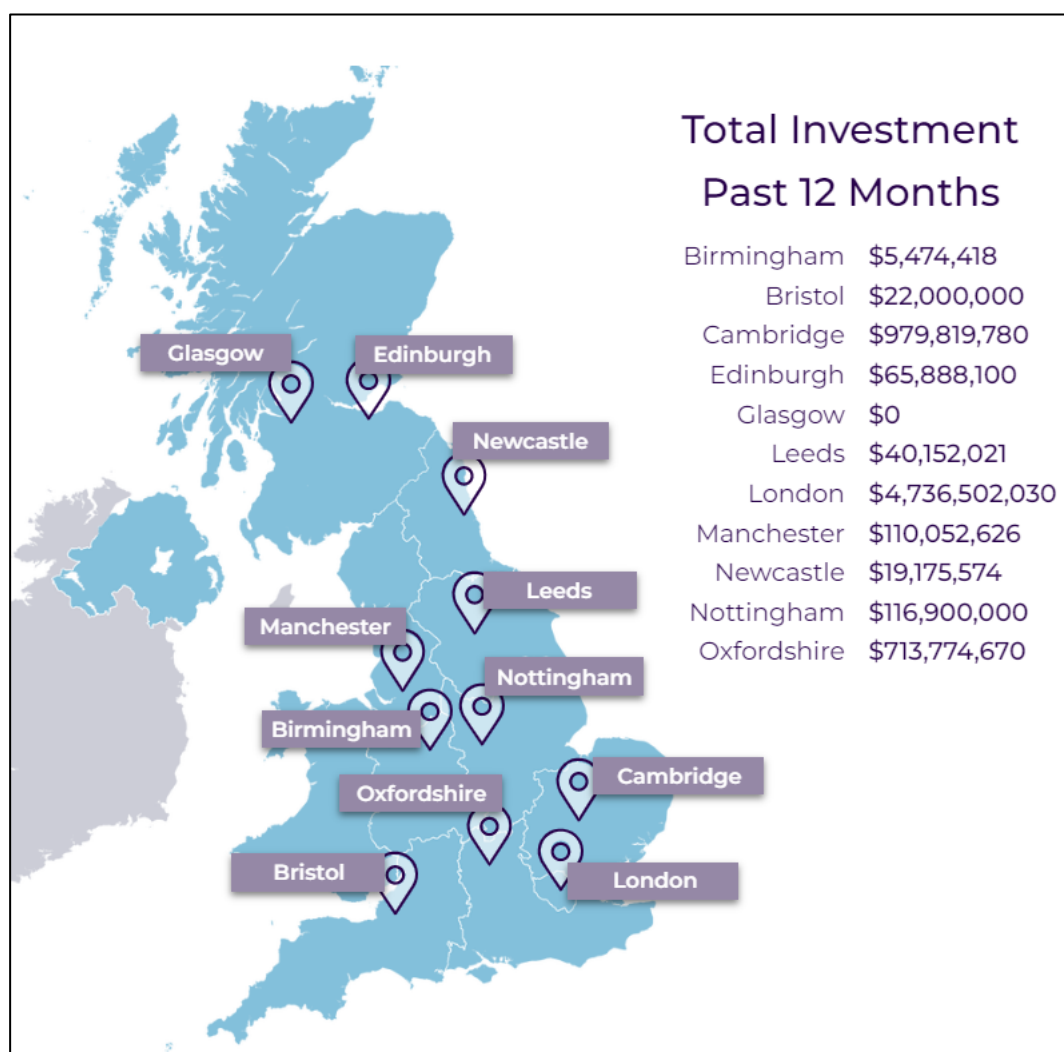
- 4.88 Since the previous assessment, the life sciences sector has become more prominent and was ‘supercharged’ by the need to discover a Covid-19 vaccine. There has been significant growth in the sector since, despite the uncertainties caused by UK researchers not being able to gain access to the Horizon programme caused by the problems surrounding the withdrawal agreement following BREXIT. Savills report that in 2022, space taken by science-related companies across the “golden triangle” of London, Oxford and Cambridge reached 130,000 sq m (1.4 million sq ft), the highest total in the last five years.¹⁴
- 4.89 Savills¹⁵ also report that Central London is attracting some larger life sciences corporate requirements citing GSK who are departing Brentford for New Oxford Street. as their new headquarters with other space moving further out to Weybridge. Savills¹⁶ also report that US pharmaceutical firm Eli Lilly continues to look in London for accelerator space totalling 6,000 sq m (65,000 sq ft). They explain that occupiers are attracted by the growing eco-system, with a significant pool of talent and a thriving start-up community.
- 4.90 As illustrated in Figure 4-7 it is the ‘golden triangle’ which sees by far the largest levels of investment in the life sciences. All other areas are very modest in comparison. Therefore, it shows that it remains difficult to attract investment for life sciences outside of the golden triangle.

¹⁴ Savills, 03 February 2023, What next for the science real estate market in 2023?

¹⁵ Ibid

¹⁶ Ibid

Figure 4-7 Life sciences investment by location



Source: Carter Jonas, Life Sciences, Research Report H1 2022

Kent as a science park location

- 4.91 As acknowledged in the previous assessment, the Kent Science Park attracts a mix and range of occupiers including science and non-science related sectors and this continues to be the case; Optivo (registered provider) took a 2,694 sq m refurbished office building on a 15 year lease in 2019¹⁷ and GW Pharmaceuticals (pharmaceuticals) are taking an 11,710 sq m (126,000 sq ft) pre-let.¹⁸ Kent Science Park is also fitting out Building 400 and Buildings 110 - 130 which total 3,624 sq m (39,000 sq ft) for laboratory space.¹⁹
- 4.92 In the wider market Discovery Park, Sandwich has experienced positive levels of lettings and renewals. It has been reported that Discovery Park, between January and August 2022 secured 32 new occupiers of office and laboratory space that total

¹⁷ Kent County Council, Caxtons, Locate in Kent, 2020, Kent Property Market Report, page 7

¹⁸ Kent County Council, Caxtons, Locate in Kent, 2022, Kent Property Market Report, page 6

¹⁹ Kent County Council, Caxtons, Locate in Kent, 2022, Kent Property Market Report, page 6

more than 2,235 sq m (24,000 sq ft).

Conclusion

- 4.93 Our update shows that the life sciences sector has expanded since the previous assessment, but the majority of growth remains around the golden triangle, with larger corporate requirements having a greater focus on London. But we know space to accommodate can be hard to come by.
- 4.94 The life sciences offer at the Kent Science Park is comparatively small and does not have the infrastructure in terms of a university to support its research and development offer. But despite its constraints, it has seen recent activity with the pre-letting to GW Pharmaceuticals – therefore pointing to organic growth rather than attempting to compete in the wider market for large footloose requirements. We can see this trend continuing against the backdrop of a growing life sciences sector.
- 4.95 Science Parks remain an ambitious, but risky, growth strategy for any Council. While KSP could form a nucleus to grow high profile activity in the Borough it will always need to compete with more well-established locations, with a stronger track record.
- 4.96 We support the aspiration to grow the Science Park and were it possible to extend or intensify activity on the site we could support that. This would not be because we considered there a robust ‘need’ case, but because we recognise that the sector is competitive and without a supply of space to offer the site is not as attractive as an inward investment location than it could otherwise be. So, we recognise that there is scope to grow.
- 4.97 We understand that incremental growth may not be possible due to the need for a ‘big bang’ investment to unlock the site. This would be a new circumstance for the Borough, and the nature of the site as an inward investment opportunity would shift. We cannot evidence this shift in this work – the target market would be national (if not international). So well outside the scope of the ELR evidence base. Large scale expansion remains a possible high risk, but also a high reward strategy.

5 The demand for employment land

- 5.1 In this section we review the alternative approaches to estimating the demand for employment land – past trends in completions and economic forecast. We do this separately for industrial and office.

Past trends

- 5.2 We start with a recap on the calculations from the 2018 ELR, then consider the range of past trend in completions periods with the latest data, before projecting forward the most appropriate past trend to identify the employment land need on that basis.
- 5.3 We note that the 2018 ELR assessment was based on a 20-year period (2016-36) and the current study is for a 18-year period - 2022-40. Therefore, to aid comparison we provide annual averages throughout.

Industrial

Recap on the outputs from the 2018 ELR

- 5.4 The summary calculation from the 2018 ELR is set out below in Table 5.1. The table divides into three elements i) demand, ii) supply and iii) the balance. The 2018 ELR identified an industrial requirement for 40 ha (averaging to 2 ha per annum).

Table 5.1 Recap 2018 ELR - Industrial – past trends-based projection

Past trends	2018 ELR	
	Total Industrial Sq m (GIA)	p.a. Sq m (GIA)
Demand		
a Change in floorspace	253,070	12,654
b Gross future losses	186,614	10,033
c Gross gains [a+b]	439,684	22,687
d Existing stock vacancy adjustment	39,959	
e Replacing committed losses	11,562	
f Gross demand [c+d+e]	491,205	24,560
Supply		
g planning permissions	146,119	
h Plan allocations	286,139	
i Supply [g+h]	432,258	21,613
j Years' supply (in years) [i/f per annum]	17.6	
Balance		
k Balance (under-supply)	58,947	2,947
l Balance (ha)	14.7	0.7
m Margin (ha)	26.0	1.3
n Final final balance (ha)	40.7	2.0

Source: Table 5.16 2018 ELR

- 5.5 What is noteworthy from the 2018 ELR past trends assessment summarised in the table above, is the substantial commitments pipeline (supply) in both planning permissions and plan land allocations (rows g and h). In 2018 this calculated to a years' supply of almost 18 years (row j), almost enough to satisfy demand over the whole 20-year plan period. The balance to be found is set out in rows k and l, and to ensure economic development was not constrained over the whole plan period a margin (five additional years of gross gains) is added that equates to 26 ha (row m), bringing the final balance (row n) to 40 ha or 2 ha per annum.
- 5.6 Next, we update the assessment adding the latest five years of past trends in completions data (2016/17 onwards) with that for 2021/22 being the latest available. Table 5.2 below sets out annual industrial floorspace change, and the final rows calculate a number of different per annum averages (in order - firstly the eight years used in the 2018 ELR, 14 years (full data set) ten and six years).

Table 5.2 Swale - Industrial floorspace change (completions)

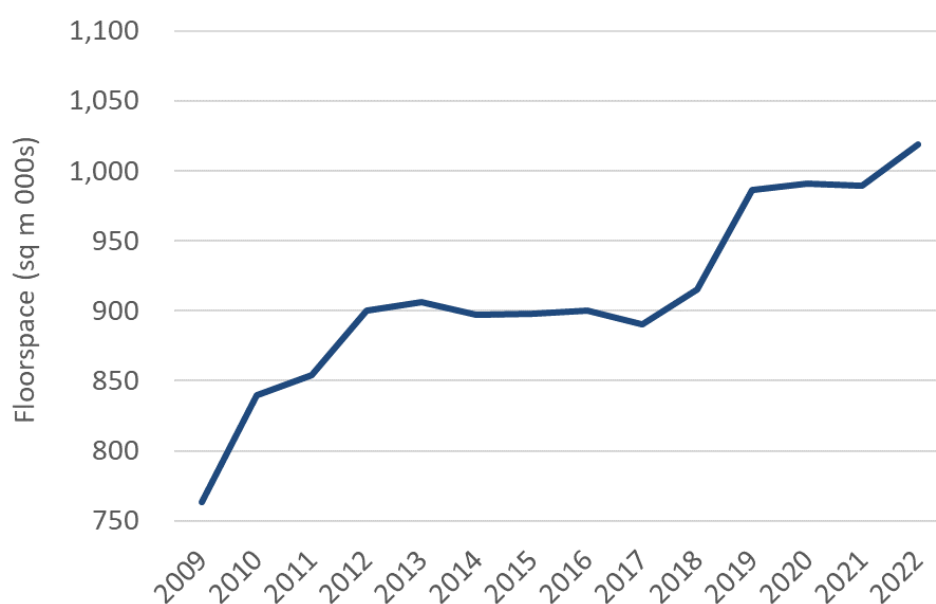
	Gross gains (sq m)	Gross losses (sq m)	Net change (sq m)
2008/09	115,927	6,949	108,978
2009/10	2,670	1,179	1,491
2010/11	4,546	12,478	-7,932
2011/12	13,806	39,020	-25,214
2012/13	19,245	5,045	14,200
2013/14	5,505	4,613	892
2014/15	11,785	6,008	5,777
2015/16	8,009	4,973	3,036
2016/17	66,899	11,574	55,325
2017/18	8,284	1,644	6,640
2018/19	15,722	3,600	12,122
2019/20	7,512	1,059	6,453
2020/21	18,008	669	17,339
2021/22	4,645	320	4,325
Per ann ave 2008/09-15/16	22,687	10,033	12,654
Per ann ave 2008/09-21/22	21,612	7,081	14,531
Per ann ave 2012/13-21/22	16,561	3,951	12,611
Per ann ave 2016/17-21/22	20,178	3,144	17,034

Source: SBC completions monitoring and Stantec analysis

- 5.7 The table shows that over this whole period (14 years) net change in industrial completions has been positive in all but two years. The two standout positive gain years - 2008/09 and 2016/17 are when the Morrisons and Aldi Regional Distribution Centres (RDCs) schemes completed.

- 5.8 The Morrisons RDC is within the trend period used in the 2018 ELR (trend period 2008/09-2015/16), it was included because such regional provision was expected to repeat within a Plan period, as indeed it did with the Aldi RDC completing in 2016/17. The Aldi RDC and substantial completions at Eurolink are within the most recent six year period. We do this purposely because large logistics and distribution facilities have repeated in the past and the market assessment suggests they are likely to continue to do so in the future.
- 5.9 All the annual average past trend periods see broadly similar quantum of gross gains, but what is striking in the Table 5.2 data is the much lower rate of gross losses in the most recent trend period, around one third of the rate identified in the 2018 ELR, and how this (lower losses) generates the higher net change in industrial floorspace in the more recent years.
- 5.10 Before moving on to project a future land requirement based on the past trends, we 'sense test' the data to make sure it provides a reliable basis. We do this by reviewing VOA²⁰ industrial floorspace data, as shown in Figure 5.1 below.

Figure 5.1 Swale industrial floorspace



Source: VOA as at March 31st each year

- 5.11 The VOA data shows an upward industrial floorspace trajectory over the past decade, recording a positive change between 2009-2022 from a little over 750,000 sq m to over 1 million sq m (a rise of 256,000 sq m). This is a very close match to the total net change in the Council monitoring data in the table above. The two datasets therefore closely align.
- 5.12 The comparatively high take-up in the most recent six-year period very much aligns

²⁰ Data on the recent changes in floorspace within Swale have been calculated from the taxation data from the Valuation Office Agency (VOA), which is the most accurate data source for floorspace. However, it is important to note that VOA data is subject to periodic reviews (revaluation years), and this can result in unstable year by year data.

with the positive industrial demand that was identified and projected in the 2018 ELR.

Future industrial demand - trend-based

Which trend period?

- 5.13 As discussed in the property market review, the outlook for industrial floorspace has changed markedly over the past couple of decades as structural changes in how and where industrial activity took place played out, triggering a lengthy trend of release of industrial land. However, the availability of surplus industrial land has largely come to an end, businesses are ‘reshoring’ their activities, supply chains and distribution are being reinforced much more locally and there is generally a much more positive industrial outlook today, fuelled by the recovery in industrial activity and growth in warehousing that has accelerated due to factors around Covid. In regard to warehouse provision, it is relevant to note that since the 2018 ELR national policy and guidance has strengthened the requirement to plan positively to support the logistics and distribution sector (see 2.8-2.11 above).
- 5.14 Thus, the more recent past, rather than the more distant past years are more reflective of how the industrial market is now, and how it is likely to function in the future. As discussed, and shown in Table 5.2 above, the most recent six-years (2016/17-21/22) have delivered gross gains in industrial floorspace that are broadly in line with longer periods, albeit a little higher. However, the recent past (2016/17-2021/22) has a higher net gain in industrial stock, a third higher than the annual average in the 2018 ELR (17,034 sq m compared to 12,654 sq m) driven by much lower losses of existing industrial floorspace – from over 10,000 sq m pa to around 3,000 sq m pa in the recent period. This assessment is consistent with the property market evidence that shows low vacancy and the strong demand for high quality industrial provision, such as that provided at Eurolink, and also very much accords with the projection for strong growth made in the 2018 ELR.
- 5.15 Therefore, basing the future trend period on the past six-years that contains a repeat RDC and also latter phases of Eurolink, reflects market sentiment and will allow the Council to plan positively and avoid constraining future economic growth.

Future industrial demand

- 5.16 Based on the 2016/17-21/22 six-year past trend period of industrial completions, the net demand calculation for the Plan period (2022-38) is shown in Table 5.3 below.

Table 5.3 Swale - industrial demand 2022-40 (based on past trends)

Past trends	Total industrial Sq m (GIA)	p.a. Sq m (GIA)
Demand		
a Change in floorspace	306,612	17,034
b Gross future losses	52,636	2,924
c Gross gains [a+b]	359,248	19,958
d Existing stock vacancy adjustment	33,667	
e Replacing committed losses	1,678	
f Gross demand [c+d+e]	394,593	21,922

Source: Swale Plan monitoring with Stantec analysis. Row a based on a six year past trend period – 2016/17-21/22 (see Table 5.2 above)

Row d existing stock vacancy adjustment - CoStar current floorspace vacancy (Sept 22) is 4.2 % - meaning 3.3 % lower than the 7.5% vacancy equilibrium, applied to 2022 total stock floorspace (1,019,000 sq m GIA sourced from VOA).

- 5.17 Compared to the 2018 ELR, demand for floorspace change (row a) on a per annum basis is a third% higher, counter-balanced to a degree by lower projected future losses (row b) that is now only around one-third of the 2018 figure. The existing stock vacancy adjustment (row d) is lower than the 39,959 sq m identified in the 2018 ELR²¹, and the committed industrial losses already in the pipeline (row e) are a fraction of the 11,500 sq m recorded in 2018²².
- 5.18 Thus, overall gross demand (row f) on a like-for-like per annum basis at 21,922 sq m is now a little lower than the 24,560 sq m pa identified in the 2018 ELR, but not significantly so.

Supply

- 5.19 We next turn to how much supply there is already in the pipeline to absorb the identified industrial demand. Based on the pipeline of planning permissions and outstanding allocations in the adopted Plan Table 5.4 sets out the available supply in the Borough. A schedule of the pipeline of supply both planning permissions and plan allocations is set out at Appendix A.

²¹ Table 5.16 2018 ELR

²² Line b Table 5.16 of the 2018 ELR.

Table 5.4 Swale - Industrial pipeline of floorspace supply

Past trends	Total industrial	p.a.
	Sq m (GIA)	Sq m (GIA)
Supply		
g planning permissions	39,590	
h Plan allocations	163,988	
i Supply [g+h]	203,578	11,310
j Years' supply (in years) [i/f per annum]	9.3	

Source: SWC Plan monitoring with Stantec analysis

- 5.20 The total pipeline of supply at just over 200,000 sq m is now less than half the 432,000 sq m recorded in 2018 ELR²³. Planning permissions are now almost 40,000 sq m, a reduction of around 100,000 sq m from the 146,000 sq m recorded in 2018. The main completions being the Aldi warehouse, various plots within Eurolink IV and V plus a major change of use scheme on the Trinity Trading Estate. The main schemes in the current planning permission pipeline are the enlarged Wienerberger factory on Church Road, Sittingbourne, the Lady Dane site Faversham and the Thanet Way, Highstreet site (full schedule of those included at Appendix A). We have excluded the hydroponics building for plant cultivation at New Road Sheerness, which would have added 12,000 sq m to the supply, as we know this has recently expired and such a large specialist use is not reflective of the general supply.
- 5.21 We have reviewed the allocations in light of very recent planning permissions and owner/promoter data, and the current availability at 164,000 sq m is 120,000 sq m lower than in 2018. This is down to changes in the potential capacity at the two largest allocations - Ridham and Kemsley and Neats Court that have been revised down.
- 5.22 In the case of Ridham and Kemsley, land to the east of Barge Way is now no longer considered to be available for the general market as it is owned by Kemsley Paper Mill and the owners have expressed a need for the site to be retained for the mill's future expansion needs. This removes 14.5 ha from the available supply sufficient to deliver around 60,000 sq m. North of Barge Way the last two remaining plots at Gpark are now considered to have potential for 60,000 sq m, plus a 1 ha (4,000 sq m) site immediately south of the now permitted Energy Park on the western side of Barge Way. Thus, capacity at Ridham and Kemsley is circa 64,000 sq m rather than the 146,000 sq m recorded in 2018.
- 5.23 At Neats Court the remaining areas with supply are the 7.5 ha southwest parcel, and a parcel north of the A249 with a recent planning permission (20/506001)²⁴. Collectively this provides capacity for 38,000 sq m half the original 76,000 sq m.

²³ Rows f, g and h Table 5.17 of 2018 ELR.

²⁴ Permission 17/501010 is included in the planning permission element of supply (row g).

- 5.24 Perry Court Farm's intended industrial use is now recorded in the planning permissions data. All the other allocations remain unchanged (see full schedule Appendix A), with the available capacity down 120,000 sq m to 164,000 sqm (row h in table above).
- 5.25 The years' supply (row j) has consequently halved from the 18 years at the time of the 2018 ELR to 9 years.

Industrial balance

- 5.26 Table 5.5 below calculates the industrial balance – demand (row f) minus available supply (row i) – both carried forward from earlier tables.

Table 5.5 Swale - Industrial balance

Past trends		Total industrial	p.a.
		Sq m (GIA)	Sq m (GIA)
f	Gross demand [c+d+e]	394,593	21,922
i	Supply [g+h]	203,578	11,310
Balance			
k	Balance (under-supply)	191,015	10,612
l	Balance (ha)	47.8	2.7
m	Margin (ha)	24.9	1.4
n	Balance with margin (ha)	72.7	4.0

Source: Stantec analysis

- 5.27 Due to the relatively high take up and unavailability to the general market of the Paper Mill site, the under-supply now is higher compared with the 2018 ELR. The balance is calculated in floorspace terms (row k), and then land (row l) by applying a 40% plot density, which is a conservative assumption as plot ratios have been, and are expected to continue tightening, for example the target in London is a minimum 65%.
- 5.28 To 'plug' the balance gap (row l) over the plan period requires an additional 47.8 ha of land.
- 5.29 As we did in 2018, and to provide some flexibility and choice in a market that may be quite volatile in the future, it is sensible to include a margin, even though the existing supply is sufficient to provide for the next 9 years. The margin is calculated on the basis of five years additional change in floorspace (row a) plus five years average gross losses (row b), the same basis as in the 2018 ELR. The effect is a 24.9 ha margin (row m) close to the 26 ha recorded in the 2018 ELR.
- 5.30 Row n identifies the land needed to balance the requirement 73 ha, which is up from the 40 ha requirement in the 2018 ELR. Important to note that the higher need now is largely a consequence of much lower available supply, and is calculated over a shorter Plan period (18 years to 2040, compared to 20 years in the previous ELR).

Conclusion industrial – past trends

- 5.31 Table 5.6 below draws together the above analysis about past trends in industrial floorspace completions and compares the 2023 update with the original 2018 ELR. Important to note again the total columns for the two assessments are for different periods (20 and 18 years respectively), and therefore the per annum figures provide for like-for-like comparison.

Table 5.6 Industrial balance – comparison 2018 ELR and 2022 update

Past trends	2018 ELR		2023 Update	
	Total Industrial Sq m (GIA)	p.a. Sq m (GIA)	Total industrial Sq m (GIA)	p.a. Sq m (GIA)
Demand				
a Change in floorspace	253,070	12,654	306,612	17,034
b Gross future losses	186,614	10,033	52,636	2,924
c Gross gains [a+b]	439,684	22,687	359,248	19,958
d Existing stock vacancy adjustment	39,959		33,667	
e Replacing committed losses	11,562		1,678	
f Gross demand [c+d+e]	491,205	24,560	394,593	21,922
Supply				
g planning permissions	146,119		39,590	
h Plan allocations	286,139		163,988	
i Supply [g+h]	432,258	21,613	203,578	11,310
j Years' supply (in years) [i/f per annum]	17.6		9.3	
Balance				
k Balance (under-supply)	58,947	2,947	191,015	10,612
l Balance (ha)	14.7	0.7	47.8	2.7
m Margin (ha)	26.0	1.3	24.9	1.4
n Balance with margin (ha)	40.7	2.0	72.7	4.0

Source: Stantec analysis

- 5.32 The market has moved on since the 2018 ELR was prepared – strong delivery in the short to medium past, on-going strong demand including for (sub)regional warehousing, and less supply have combined to increase the balance (requirement).
- 5.33 The balance gap (row l) is now some 48 ha, which is more than double the corresponding figure in the 2018 ELR. Applying a margin for choice and flexibility (row m) to this identifies a total requirement of 73 ha (row n) higher than the 41 ha previously identified, which on a comparable per annum basis is 4 ha pa – double that in 2018.
- 5.34 But there is a choice to be made in terms of whether or not to factor in the margin. The margin is calculated at around one third of total demand over the plan period –99 ha of gross demand²⁵ and the margin is a further 25 ha. 25 ha of land is still a

²⁵ Row f of Table 5.6 354,677sq m / 4,000 = 89 ha

considerable requirement and raises the issue as to whether this contingency is an efficient use of land. Especially because there is a risk that land will not be taken-up and the potential allocations effectively sterilise otherwise developable land.

- 5.35 Our opinion is that allowing for the margin is clearly preferable because it helps address risk in a very uncertain market. But if the market is unable or unwilling to promote land, and / or that on balance alternative uses are preferable for the land in question (at the plan-making stage) the margin can reduce.
- 5.36 Promoting the plan without the margin would still present a plan that is able to meet its need in full, but may be more reliant on a plan review to top-up supply than would otherwise be the case.
- 5.37 The need for the margin is also much reduced if the plan supply is, at the time the plan is made, reasonably free of constraints. So, if demand is higher than expected, land in the portfolio can be brought forward earlier than expected. For this reason, the land supply should preferably be front loaded and if this is not possible greater consideration given to the margin.
- 5.38 Either way we suggest take-up should be closely monitored, and should this be more rapid than anticipated, then more land be allocated through Plan Review.

Future office demand - trend-based

- 5.39 The assessment of the need for offices based on past trends in office floorspace change follows the same approach as that outlined above for industrial, and so we focus on the outputs and only describe those method elements that are different to the industrial assessment.

Recap on the outputs from the 2018 ELR

Table 5.7 Recap 2018 ELR - office – past trends-based projection

Past trends	2018 ELR	
	Total office Sq m (GIA)	p.a. Sq m (GIA)
Demand		
a Change in floorspace	74,393	3,720
b Gross future losses	40,000	2,000
c Net demand [a+b]	114,393	5,720
d Existing stock vacancy adjustment	1,083	
e Replacing committed losses	2,545	
f Gross demand [c+d+e]	118,021	5,901
Supply		
g planning permissions	22,024	
h Plan allocations	35,675	
i Supply [g+h]	57,699	2,885
j Years' supply (in years) [i/f per annum]	9.8	
Balance		
k Balance (under-supply)	60,322	3,016
l Balance (ha)	15.1	0.8

Source: Table 5.8 2018 ELR

- 5.40 The 2018 ELR projected gross demand of 118,000 sq m, identified an existing supply of almost half of this (57,699 sq m) that left a balance to find of around 60,000 sq m that at a plot ratio of 40% required 15 ha of land.
- 5.41 Below, Table 5.8 updates the past trends data and explore the periods as per the industrial assessment.

Table 5.8 Office floorspace change

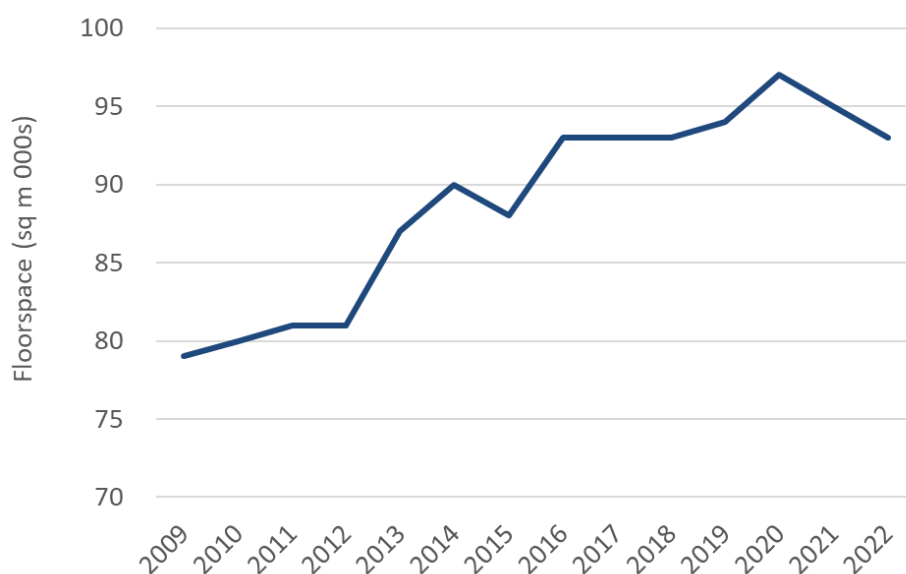
	Gross gains (sq m)	Gross losses (sq m)	Net change (sq m)
2008/09	9,876	3,126	6,750
2009/10	964	2,907	-1,943
2010/11	3,313	1,085	2,228
2011/12	3,993	827	3,166
2012/13	1,050	2,292	-1,242
2013/14	1,234	2,377	-1,143
2014/15	9,184	724	8,460
2015/16	143	1,924	-1,781
2016/17	3,060	2,526	534
2017/18	1,175	2,278	-1,103
2018/19	246	632	-386
2019/20	1,730	1,541	189
2020/21	1,050	1,042	8
2021/22	200	1,558	-1,358
Per ann ave 2008/09-15/16	3,720	1,908	1,812
Per ann ave 2008/09-21/22	2,658	1,774	884
Per ann ave 2012/13-21/22	1,907	1,611	486
Per ann ave 2016/17-21/22	1,244	1,596	-353

Source: SBC monitoring and Stantec analysis

- 5.42 What is evident from the annual averages shown in Table 5.8 above, is that there was more office development activity in the more distant past compared with the most recent – gross gains are a third lower in the most recent six years. Gross losses are very similar over through all periods, and therefore the net change is lower in the more recent past. In comparative terms Swale sees very little office activity and has generally seen a very marginal net positive change, but this is down to one or two schemes (Europark in 2008/09 and The Foundry in 2014/15) counter-balancing steady rate of losses.
- 5.43 When we drill down into the data what is evident is that the majority of the space that has been delivered is a hybrid flexible space that could operate as light industrial or office, such as the units at Europark and The Foundry, We exclude the office space at the Aldi RDC as this was ancillary to the warehouse, and not part of general supply.
- 5.44 This analysis is in line with our previous advice – Swale is a weak office location, but this does not mean there is no demand for an office type product. But here, in this market, the office demand is often met in small flexible units that, under the previous Use Class Order, we classed as (light) industrial units as opposed to offices.

- 5.45 These schemes (The Foundry and at Europark) were within the 2018 ELR data, and the last six years have shown that the ‘story’ remains the same, Swale has a modest office base, and what additions there have been over the past decade have actually been flexible space that has in practice operated as light industrial rather than office. However, the past trends data shows that even delivery of any hybrid office related product has slowed in recent years. As the market commentary identified there is no market appetite for new traditional office space now or in the foreseeable future, with the only format that has been delivered and taken up being the hybrid flexible format.
- 5.46 It is useful to note that Swale is unusual in that office losses, following the introducing of Permitted Development Rights (office to residential) have been limited, marginally positive in the longer term, albeit overall activity is very low. This marginal positive is most likely because the (long term) weak office market resulted in very little office stock of a size and type that could be converted. Also, the Borough’s office demand is generally local and has not been affected by some of the larger shifts in how office space is used (pre-Covid). In many office markets large firms had been consolidating their office needs even before Covid; making more incremental use of technology and home-working to reduce the need for space. But the market here does not seem to be so affected. We only note this here because in many markets a positive past trend would not pass a common-sense check, but here given the nature of the stock, a very modest positive past take-up does, albeit the most recent year is negative.
- 5.47 Next, in Figure 5.2 we chart the published VOA data over the same period as Table 5.8 above to compare and ‘sense test’ the Council’s monitoring data.

Figure 5.2 Swale office floorspace



Source: VOA as at March 31st each year

- 5.48 The VOA data closely corresponds with the Council’s monitoring data with the VOA showing an overall gain over the period of around 13,000 sq m, very close to the 12,000 sq m in the Council’s plan monitoring data.

Future Office demand - which trend period?

- 5.49 The 2018 ELR was based on a reasonably optimistic outlook for the future office market. Net growth in floorspace that could be used flexibly for office or light industrial or a hybrid of the two had been steady at around 1,800 sq m per annum, the stock increasing with schemes such as the Foundry and Europark. These schemes had not replaced existing office, they were on sites that had been in industrial or other uses, and so in the 2018 ELR we projected based on the gross gain in office floorspace (as opposed to the net change) over the trend period – gross gains averaged 3,720 sq m in the trend period in the 2018 ELR. In the context of the Borough's existing office supply of 93,000 sq m at that time, this trend produced a comparatively large demand figure (74,000 sq m), to which 44,000 sq m was added to make good future losses identifying a gross demand of 118,00 sq m. As we point out, the office product that had been delivered in the past was hybrid flexible space that in practice had not been provided in town centres or on office parks, instead was located in industrial areas, and had been occupied by businesses more closely aligned with industrial activity. Our discussions with the property market and occupiers made clear that this was the product in demand, and that was planned for.
- 5.50 We are now in much more uncertain times, the long-term Covid impact is yet to become clear. But, office-based working practices have changed, and it is very unlikely that the demand for office space will return to pre-Covid levels. The occupier market is seeing office rationalisations, and what is termed a 'flight to quality' as occupiers exchange their old offices for better quality but less intensively used office space.
- 5.51 Office delivery in the Borough over the full 14 year period, does exhibit adaption to new more flexible formats as discussed above, but clearly less space is being delivered. On the other hand, Swale office stock vacancy is just 2.5%, which is well below the equilibrium level (7.5% vacancy) where property markets are considered to operate effectively and in the interests of economic growth. However, we also know office take up is very low and there is very little developer interest in the office / hybrid market.
- 5.52 In this update we present two past trends versions – firstly a 're-run' of the 2018 assessment, making all the same allowances, but based on the latest data using a six year past trend, and secondly a scenario that only takes the past trends into consideration, ie not making the allowances for future losses. This on the basis that the jobs that occupy space losses appear to have been absorbed in the remaining existing stock and/or absorbed by increased working from home, thereby Swale's office economy shows no signs of constraint.
- 5.53 Given that the vast majority of the Borough's new office/flexible space has come forward on sites not previously in office use, we continue to project forward on the basis of gross gains – ie we think the office losses have not/will not be recycled for office use, and therefore new land is needed. Annual average gross gains for this most recent six years (1,244 sq m pa) is considerably lower than the past trend figure used in the 2018 ELR – two-thirds lower. As referred to above the office losses are relatively minor in scale, mostly to other uses (residential) and while they may have

displaced some office jobs these appear to have been absorbed into the remainder of the stock and an increase in working from home. Therefore, we present two scenarios one with (rerun approach) and one without an allowance to replace future office losses. Given the views of the market we favour the scenario that does not factor in allowances to make good future losses, as the evidence suggests this is no longer necessary.

Future Office demand

- 5.54 The six-year past trend gross gains and gross losses identified in Table 5.8 above are the basis for the net demand calculation set out in Table 5.9 below.

Table 5.9 Swale office demand 2022-40

Past trends	2023 Update (2022-40)			
	Rerun approach		Scenario	
	Total office	p.a.	Total office	p.a.
	Sq m (GIA)	Sq m (GIA)	Sq m (GIA)	Sq m (GIA)
Demand				
a Change in floorspace	22,383	1,244	22,383	1,244
b Gross future losses	28,800	1,600		
c Net demand [a+b]	51,183	2,844	22,383	1,244
d Existing stock vacancy adjustment	5,374			
e Replacing committed losses	1,170			
f Gross demand [c+d+e]	57,727	3,207	22,383	1,244

Source: Swale Plan monitoring with Stantec analysis. (six-year past trend period – 2016/17-21/22)

For 'rerun' approach - row d existing stock vacancy adjustment - CoStar current floorspace vacancy (Sept 22) is 2.6% - meaning 5% lower the 7.5% vacancy equilibrium, applied to a 2022 total stock floorspace (93,000 sq m NIA sourced from VOA) is 4,568 sq m NIA. NIA to GIA 85% factor as advised by the HCA Guide sums to 5,374 sq m.

- 5.55 In both the rerun and scenario net and gross demand for floorspace are substantially lower than the corresponding 2018 ELR figures. Gross demand (row f) under the rerun approach is down by almost half on the 2018 like-for-like per annum figure 5,901 sq m, and the scenario represents just one fifth of the 2018 figure. This is a large proportional drop, but still represents a 20% increase on total office stock in Swale over 18 years, albeit because we do not consider it necessary to factor in replacement losses it is possible that total office stock may not increase.

Supply

- 5.56 Next, we consider supply – the pipeline of office permissions and plan allocations. The schedule of sites within both categories are listed at Appendix A.

Table 5.10 Office pipeline of floorspace supply

Past trends		Total office	p.a.
		Sq m (GIA)	Sq m (GIA)
Supply			
g	planning permissions	21,844	
h	Plan allocations	20,000	
i	Supply [g+h]	41,844	2,325
j	Years' supply (in years) [i/f per annum]	13.0	

Source: Swale Plan monitoring with Stantec analysis

5.57 Most of the pipeline of supply of land identified for office use is at just two sites to the south and east of Faversham - Perry Court and Lady Dane Farm. The 2018 ELR included permission for 11,500 sq m ancillary office at Sheerness Docks that was at that time extant, but which subsequently expired in 2017/18. The exclusion of that scheme and switch of the Perry Court site from allocation to planning permission explains the difference in the figures. Thus overall, current available supply of office floorspace is 30% lower (17,000 sq m less) than identified in the 2018 ELR.

5.58 Based on the estimated rate of office development (row f) the supply will last 13 years (rerun) and 34 years (scenario), longer than 10 years identified in the 2018 ELR figure.

Office balance

5.59 The balance between demand (row f) and supply (row i) is set out in Table 5.11 below.

Table 5.11 Office balance

Past trends	Rerun approach		Scenario	
	Total office	p.a.	Total office	p.a.
	Sq m (GIA)	Sq m (GIA)	Sq m (GIA)	Sq m (GIA)
f Gross demand [c+d+e]	57,727	3,207	22,383	1,244
i Supply [g+h]	41,844	2,325	41,844	2,325
Balance				
k Balance (over-supply)	15,883	882	(19,461)	(1,081)
l Balance (ha)	4.0	0.2	(4.9)	(0.3)

Source: Stantec analysis nb bracketed data signals existing over-supply.

5.60 On the basis of the rerun approach the updated assessment identifies a positive requirement over and above the already committed supply of 16,000 sq m, which on the basis of a 40% plot ratio generates a notional land requirement of 4.0 ha – one quarter that identified in the 2018 ELR. However, our favoured scenario identifies that current supply exceeds demand by approximately 20,000 sq m over the plan

period ie the current pipeline has the potential to more than adequately meet demand. We will go on to review whether these sites are best placed and likely to deliver all or any of the need.

Past trends conclusion - office

- 5.61 Table 5.12 below draws together the above analysis and compares the 2023 update with the original 2018 ELR. Important to note the per annum figures provide for like-for-like comparison.

Table 5.12 Swale office balance – comparison 2018 ELR and 2023 update

Past trends	2018 ELR (2016-36)		2023 Update (2022-40)			
			Rerun approach		Scenario	
	Total office	p.a.	Total office	p.a.	Total office	p.a.
	Sq m (GIA)	Sq m (GIA)	Sq m (GIA)	Sq m (GIA)	Sq m (GIA)	Sq m (GIA)
Demand						
a Change in floorspace	74,393	3,720	22,383	1,244	22,383	1,244
b Gross future losses	40,000	2,000	28,800	1,600		
c Net demand [a+b]	114,393	5,720	51,183	2,844	22,383	1,244
d Existing stock vacancy adjustment	1,083		5,374			
e Replacing committed losses	2,545		1,170			
f Gross demand [c+d+e]	118,021	5,901	57,727	3,207	22,383	1,244
Supply						
g planning permissions	22,024		21,844		21,844	
h Plan allocations	35,675		20,000		20,000	
i Supply [g+h]	57,699	2,885	41,844	2,325	41,844	2,325
j Years' supply (in years) [i/f per annum]	9.8		13.0		33.7	
Balance						
k Balance (over-supply)	60,322	3,016	15,883	882	(19,461)	(1,081)
l Balance (ha)	15.1	0.8	4.0	0.2	(4.9)	(0.3)

Source: Stantec analysis nb bracketed data signals existing over-supply.

- 5.62 Our assessment of demand for office space by both approaches is now considerably lower than the level identified in the 2018 ELR (row f). Supply (row i) is also down now compared with 2018, but sufficient to deliver future demand into the medium term (the next 13 years under the rerun approach - row j) and double the requirement under our favoured scenario approach. Thus, in terms of the balance, the additional requirement that was in 2018 60,000 sq m equivalent to 15 ha (on a 40% plot ratio basis) is reduced to 16,000 sq m or an existing over-supply of 20,000 sq m (row k), which is a substantially changed position from the 2018 ELR.
- 5.63 For the plan to be positively prepare, land should be identified to meet demand that would provide for the new jobs. The 20,000 sq m of demand (row a) identified by applying a PPG compliant past trends approach would alone represent roughly a 20% increase in Swale's office floorspace which is broadly consistent with what has been delivered in the past, and that the market indicates has been the hybrid flexible space not traditional office. Thus, the requirement (20,000 sq m) should be considered interchangeable with industrial, as indeed the existing committed supply largely is. In

land terms this is a modest amount compared with the industrial requirement.

- 5.64 While it is possible that an element of the identified requirement could come forward through ‘windfall’ gains in the town centres, the fact that this route has not delivered significant floorspace in the past means that it cannot be relied upon to deliver in the future. Therefore, when we turn to supply for office this will need to consider if the existing sites and scale of the allocations are best to meet future office need.
- 5.65 We do note that the existing supply is heavily weighted in favour of sites east of Faversham, with no sites available in Sittingbourne, and thus to offer choice of location and balance the distribution of future office jobs, should suitable sites be identified and come forward on the western side of the Borough these should be supported in principle.

Economic forecast approach

- 5.66 Next, we consider a labour demand (an economic forecast) based approach. We first restate the findings and requirements of the economic forecast set out in the 2018 ELR, then review what has happened in terms of job change in the intervening period, before finally comparing the 2018 requirements with a fresh calculation based on current economic forecasts.

Recap on the 2018 ELR

- 5.67 As previously stated over the 20-year Plan period the economic forecast approach generated:
- an industrial over-supply of 27.7 ha.
 - an office requirement of 9 ha.
- 5.68 The economic forecast approach was not carried forward in the recommendations because the past trends approach was more positive. This work reconsiders the data to test if the same approach applies.
- 5.69 In terms of job change the 2018 ELR noted the economic forecast²⁶ was for²⁷:
- Industrial jobs:
 - Core industrial²⁸ – a loss of 87 jobs (2 pa)
 - Warehousing – 1,097 additional jobs (55 pa)
 - For office – 3,376 additional jobs (169 pa).
- 5.70 It is relevant to note that in 2016 the core industrial sector in Swale supported 11,800 jobs, almost 50% more than were employed in offices, which indicates the relative strength of the two land uses and the importance of the industrial sector.

Industrial requirement

- 5.71 The industrial jobs change referred to above translated to a floorspace requirement

²⁶ Based on a September 2017 Experian economic forecast

²⁷ Table 5.1 2018 ELR

²⁸ Manufacturing, specialised construction and other industrial activities

thus:

- A loss of 87 industrial jobs multiplied by 41.5 sq m per job sums to -3,869 sq m.
- 1,097 warehouse jobs multiplied by 73.5sq m per job plus 7.5% additional to allow for availability in the market sums to 86,697 sq m.
- Together this sums to demand for 82,828 sq m.

5.72 Table 5.13 below sets out the calculations for the 2018 ELR economic forecast-based approach. Much of the data, such as vacancy, losses and the supply are common to both this and the past trend-based assessments, and so the commentary on those aspects are not repeated here.

5.73 The critical difference between the past trends and the economic forecast based approached is the data in row (a) - the net demand figure.

Table 5.13 Industrial requirement calculations in the 2018 ELR

Forecast	2018 ELR	
	Total Industrial Sq m (GIA)	p.a. Sq m (GIA)
Demand		
a Net demand	82,828	4,141
b Gross future losses	186,614	10,033
c Gross gains [a+b]	269,442	14,174
d Existing stock vacancy adjustment	39,959	
e Replacing losses	11,562	
f Gross demand [c+d+e]	320,963	16,048
Supply		
g planning permissions	146,119	
h Plan allocations	286,139	
i Supply [g+h]	432,258	
Balance		
j Balance (over-supply)	-111,295	-5,565
k Balance (ha)	-27.8	

Source: Stantec analysis

5.74 The 2018 ELR concluded that such modest job growth (row a) did not pass the 'common-sense' test, and this approach that generated a negative requirement after available supply was factored in, was therefore set aside.

Office requirement

5.75 Next, we consider the economic forecast approach for the office requirement.

5.76 Jobs translated to an office floorspace requirement thus:

- 3,376 jobs multiplied by 13.8 sq m per job, plus 7.5% additional to allow for availability in the market. This sums to 50,089 sq m²⁹.

²⁹ Table 5.4 2018 ELR

Table 5.14 Swale office requirement calculations in the 2018 ELR

Forecast	2018 ELR	
	Total office Sq m (GIA)	p.a. Sq m (GIA)
a Net demand	50,089	2,504
b Gross future losses	40,000	2,000
c Gross gains [a+b]	90,089	4,504
d Existing stock vacancy adjustment	1,083	
e Replacing losses	2,545	
f Gross demand [c+d+e]	93,717	4,686
Supply		
g planning permissions	22,024	
h Plan allocations	35,675	
i Supply [g+h]	57,699	
Balance		
j Balance	36,018	1,801
k Final balance (ha)	9.0	

Source: Stantec analysis

- 5.77 This approach generated a positive requirement for office activity, but at 9 ha this was less than the 15 ha from the past trends assessment that was preferred for plan-making purposes.
- 5.78 Thus, the 2018 ELR did not take forward the economic forecast-based approach for either office or industrial for plan-making purposes. The past trend approach being favoured for both industrial and office need purposes.

The recent past

- 5.79 Next, based on economic forecast data that contains official published data from Government statistics, we look at what has happened in terms of job change in the recent past. We use the period from the last base year (2016) and 2019 to avoid the Covid period and its aftermath.

Job change 2016-19

- 5.80 Table 5.15 below shows that core industrial job change has been reasonably positive, more positive than we previously expected. But care is needed because this data is for a short period and relatively small numbers can be volatile (200 jobs could be a single firm moving or expanding). Warehouse job growth was also positive, as we expected, although the new Aldi jobs may not yet be recorded in this data. The data shows that office job numbers were almost entirely unchanged.
- 5.81 This data suggests that the direction of travel we projected in 2018 was broadly correct, and confirms a positive industrial outlook was correct as well as our cautious office outlook. The data suggests that after decades of industrial job losses that the 2018 study showed as slowing, this may have shifted from low level losses to low

growth, but this could simply be the product of a point in the economic cycle.

Table 5.15 Swale - industrial and office job change 2016-19

	Job change	
	Total	p.a.
<i>Industrial</i>	207	69
<i>Warehousing</i>	169	56
Industrial total	376	125
Office	2	1

Source: Stantec analysis

Job densities

- 5.82 The link between job change and floorspace change is not always clear, because in many areas firms have been evolving the way they use their property.
- 5.83 Even pre-Covid borough-wide employment densities (generally for offices) were much tighter in some major office centres and areas, such as the Thames Valley. So, care is always needed when estimating floorspace demand from any given job number. Post-Covid the link has been complicated by the much higher propensity for some of the working week to take place through home working. Whereas the ‘flight to quality’ referred to earlier implies more space per worker, the counter to this is workers only need a desk in the office for a proportion of the week, and therefore desk space is effectively shared and job densities tighten.
- 5.84 Here we have looked at the pre-Covid Swale-wide densities (Table 5.16 below) and they appear to sit within reasonable norms.

Table 5.16 Job densities 2019

	Floorspace sq m	Jobs	Density sq m / job
Industrial	986,000	19,775	49.9
Office	94,000	8,165	11.5

Source: 2019 floorspace VOA, jobs from Experian economic forecast (June 2022) and Stantec analysis

- 5.85 The industrial densities reflect a sector with a strong warehouse and logistics angle – where job densities tend to be lower (ie more sq m per job) than manufacturing space. The benchmark rule of thumb densities for manufacturing space is around 1:36 (HCA Guide³⁰) whereas warehousing for logistics/distribution activities is over 1:70³¹. So, with an average of 1:50 this would reflect where we would expect the densities to be, knowing that Swale is attractive to logistics.

³⁰ HCA Employment density Guide 3rd Edition Nov 2015

³¹ Note: in the logistics/distribution sector this job density measure is much less relevant because the economic value of the space is associated with good moving through the property as opposed to an economic activity being undertaken inside.

- 5.86 In 2019 the office stock was used at 1:11.5 sq m per job. This is where we would generally expect it to be, based on national averages identified in established sources (including the HCA employment density guide) and our experience, given the nature of the stock and office sector in Swale. Obviously post-Covid densities will change if homeworking continues, but estimating by how much is still hard because the return to work is not evenly spread across the working week. For Swale it is useful to know that pre-Covid space was used in line with general market norms and so, post-Covid, we would expect the market to move along with prevailing market changes. In the short-term it would be unwise to make alternative assumptions about how space may be used differently in the future, but the direction of travel would suggest any assessment of need based on office densities (pre-Covid) may be an overestimate. However, it is also the case that Swale's office stock is small, and so changing working practices are unlikely to release large office estates that the plan should be preventing. Instead, we may see smaller scale windfall losses that can be managed through the development management process.

The new forecast

- 5.87 In this section we identify new forecasts for future job change and floorspace demand for industrial and office activity in Swale. This is based on the latest Experian economic forecast from June 2022.
- 5.88 The forecast takes in the 18 year Plan period - 2022-38, and again per annum figures are included to aid comparison with the forecast in the 2018 ELR.

Job change

- 5.89 Table 5.17 presents future forecast job change in Swale for both industrial and office jobs over the Plan period.

Table 5.17 – Swale - industrial and office job change 2022-40

	Job change	
	Total	p.a.
<i>Industrial</i>	-29	-2
<i>Warehousing</i>	1,209	67
Industrial total	1,180	66
Office	3,186	177

Source: Experian economic forecast (June 2022) and Stantec analysis

- 5.90 We see that industrial job change is very marginally negative for core industrial, as it was last time. Within the industrial forecast manufacturing is forecast to continue losing jobs, it is growth in the specialised construction sector that counter-balances manufacturing losses. Warehousing job change is marginally higher in the current forecast – a positive 67 pa compared to 55 pa previously; less of a change than the market would anticipate.
- 5.91 The forecast for office job change (177 pa) is very similar to the 2018 ELR forecast (169 pa). The growth is mostly professional services, so largely jobs servicing an expanding population.

5.92 Next, we consider the new economic forecast-based assessment of demand for floorspace / land, firstly for industrial activity and then for office.

Industrial - economic forecast based approach

- Forecast demand generated by the change in jobs is shown in Table 5.18 adjusted to 8.1% from 7.5%. This is because although 7.5% is the industry-wide accepted vacancy rate in an optimally efficient market, for the vacancy rate to stay at 7.5% over the plan period, for every 92.5 sq m of additional space that will be taken up by occupiers, developers should provide a further 7.5 sq m that will remain vacant. Therefore, developer demand will be $7.5 / 92.5 = 8.1\%$. above occupier demand.
- Table 5.18 below.

5.93 In the calculation there are some method differences from that employed in 2018 ELR. These are minor and have no significant impact on the overall calculations. The method changes are:

- The floorspace densities (row ii) have shifted a little (from 41.5 for core and 73.5 sq m for warehousing GIA per job respectively), but not significantly - one higher one lower.
- The vacancy factor that is added to the occupier demand (row iv) is adjusted to 8.1% from 7.5%. This is because although 7.5% is the industry-wide accepted vacancy rate in an optimally efficient market, for the vacancy rate to stay at 7.5% over the plan period, for every 92.5 sq m of additional space that will be taken up by occupiers, developers should provide a further 7.5 sq m that will remain vacant. Therefore, developer demand will be $7.5 / 92.5 = 8.1\%$. above occupier demand.

Table 5.18 Industrial occupier demand 2022-40

	Core industrial	Warehousing	Total Industrial	p.a.
i Jobs change (2022-40)	-29	1,209	1,180	66
ii Density factor (sq m GIA /job)	45.0	66.5		
iii Occupier demand (sq m GIA) [a*b]	-1,303	80,374	79,072	
iv Vacancy factor (sq m GIA) [c*8.1%]	-106	6,510	6,405	
a Total occupier demand (sq m GIA) [c+d]			85,477	

Source: Experian economic forecast (June 2022) and Stantec analysis

5.94 The calculation of gross demand set out in the table below carries forward the occupier net demand from row (a) in the above table.

Table 5.19 Swale - industrial demand 2022-40

Forecast (2022-40)		Total industrial Sq m (GIA)	p.a. Sq m (GIA)
Demand			
a	Net demand	85,477	4,749
b	Gross future losses	62,092	3,709
c	Gross gains [a+b]	147,569	8,458
d	Existing stock vacancy adjustment	33,667	
e	Replacing losses	1,678	
f	Gross demand [c+d+e]	182,914	10,162

Source: Experian economic forecast (June 2022) and Stantec analysis

- 5.95 All the data except for row (a) is carried over from the past trends assessment, and demand on the basis of the economic forecast is 183,000 sq m or approximately 10,000 sq m per annum. This is less than half the rate identified in the past trends approach.

Balance

- 5.96 The supply is the same as that set out in the past trends analysis (203,578 sq m³²), so we move straight to balance calculation – demand (row f) minus supply (row i).

Table 5.20 Industrial balance 2022-40

Forecast (2022-40)	Total industrial		p.a.
	Sq m (GIA)	Sq m (GIA)	
f Gross demand [c+d+e]	182,914		10,162
i Supply [g+h]	203,578		
Balance			
j Balance (over-supply)	(20,664)		(1,148)
k Balance (ha)	(5.2)		

Source: Stantec analysis . nb bracketed data signals existing over-supply.

- 5.97 Thus, on the basis of the economic forecast-based approach there is an over-supply (bracketed data) of industrial floorspace – some 20,000 sq m of supply over and above that needed to satisfy demand. But this is mostly down to the much lower correction for future losses. The new economic forecast only increases job growth by a relatively minor amount, and less than the 2018 forecast, and in conclusion this does not align with the market view. Therefore, this approach does not pass the ‘common sense’ test.

³² See Table 5.4 above.

Conclusion of economic forecast-based approach - industrial

- 5.98 Table 5.21 below draws together the above analysis and compares the economic forecast-based assessment of the industrial need in the 2023 update with the original 2018 ELR.

Table 5.21 Swale industrial balance – economic forecast-based approach

Forecast (2022-40)	2018 ELR		2023 Update	
	Total Industrial	p.a.	Total industrial	p.a.
	Sq m (GIA)	Sq m (GIA)	Sq m (GIA)	Sq m (GIA)
Demand				
a Net demand	82,828	4,141	85,477	4,749
b Gross future losses	186,614	10,033	62,092	3,709
c Gross gains [a+b]	269,442	14,174	147,569	8,458
d Existing stock vacancy adjustment	39,959		33,667	
e Replacing losses	11,562		1,678	
f Gross demand [c+d+e]	320,963	16,048	182,914	10,162
Supply				
g planning permissions	146,119		39,590	
h Plan allocations	286,139		163,988	
i Supply [g+h]	432,258		203,578	
Balance				
j Balance (over-supply)	(111,295)	(5,565)	(20,664)	(1,148)
k Balance (ha)	(27.8)		(5.2)	

Source: Stantec analysis nb bracketed data signals existing over-supply.

- 5.99 The economic forecast-based estimate of future industrial demand fails the common sense test when considered through the ‘prism’ of the market assessment, because it clearly under-estimates the scale of demand. Whereas the past trends assessment aligns with the property market view that identifies strong demand for industrial floorspace.

Offices - economic forecast based approach

- 5.100 Finally, we turn to the economic forecast approach to office need, following the same approach as that for industrial.
- 5.101 There are some relatively minor differences in the calculation compared with the 2018 ELR, which are as follows:
- the density factor (row ii) is now given as NIA rather than GIA, and is now 12 sq m per job compared to the 13.8 sq m GIA used previously. This change is made because the HCA office floorspace averages are provided as NIA. Row a converts NIA to GIA to allow comparison with 2018 ELR.

- As for the industrial calculation the vacancy factor that is added to the occupier demand is adjusted to 8.1% from 7.5%.
- The existing stock adjustment (row d of Table 5.23) that is sourced from the VOA as NIA is converted to GIA.

Table 5.22 Swale office occupier net demand 2022-40

	Total	p.a.
i Jobs change (2022-40)	3,186	177
ii Density factor (sq m NIA /job)	12.0	
iii Occupier demand (sq m NIA) [a*b]	38,228	
iv Vacancy factor (sq m NIA) [c*8.1%]	3,096	
v Total occupier demand (sq m NIA) [c+d]	41,324	
a Total occupier demand (sq m GIA) [e/0.85]	48,617	2,701

Source: Experian economic forecast (June 2022) and Stantec analysis

- 5.102 The overall product of the updated data and adjustments to the method is a net occupier demand (row a in the table above) close to the 2,500 sq m per annum occupier demand figure in the 2018 ELR.
- 5.103 As we have for the past trends-based approach, we apply both a ‘rerun’ of the 2018 approach and a scenario that does not carry forward a trend-based allowance for estimated future losses or the vacancy adjustment. Table 5.23 below inputs the net occupier demand into the calculation of gross demand for floorspace.

Table 5.23 Swale office gross demand 2022-40

Forecast (2022-40)	Rerun approach		Scenario	
	Total office	p.a.	Total office	p.a.
	Sq m (GIA)	Sq m (GIA)	Sq m (GIA)	Sq m (GIA)
a Net demand	48,617	2,701	48,617	2,701
b Gross future losses	28,800	1,600		
c Gross gains [a+b]	77,417	4,301	48,617	2,701
d Existing stock vacancy adjustment	5,374			
e Replacing losses	1,170			
f Gross demand [c+d+e]	83,961	4,664	48,617	2,701

Source: Stantec analysis

- 5.104 All the data, other than row a, is the same as that described in the past trends analysis (paragraph 5.55).
- 5.105 The economic forecast-based net demand figure in the table above (2,701 sqm p.a. row a) is approximately double the updated past trends-based gross gains projection (1,244 sq m pa).

Balance

- 5.106 The supply has been discussed previously, and so gross demand minus the 40,606 sq m supply generates the economic forecast-based balance of unmet need for the rerun and scenario approaches identified in the table below.

Table 5.24 Swale office balance 2022-40

Forecast (2022-40)	Rerun approach		Scenario	
	Total office	p.a.	Total office	p.a.
	Sq m (GIA)	Sq m (GIA)	Sq m (GIA)	Sq m (GIA)
f Gross demand [c+d+e]	83,961	4,664	48,617	2,701
i Supply [g+h]	41,844		41,844	
j Years' supply [i/f per annum]	9.0		15.5	
k Balance	42,117	2,340	6,773	376
l Final balance (ha)	10.5	0.6	1.7	0.1

Source: Stantec analysis

- 5.107 Table 5.24 indicates that on the rerun approach there is sufficient supply for exactly half the Plan's 18 years (row j), but on our preferred scenario approach there is approaching sufficient supply to meet the need over the whole period.
- 5.108 A 'rerun' requirement/balance (rows k and l) to find for circa 42,000 sq m, or 11 ha on the basis of 40% plot ratio. However, the scenario suggests that need and current supply over the plan period are in virtual equilibrium.

Conclusion forecast-based office need

- 5.109 Table 5.25 below draws together the above analysis and compares the economic forecast-based assessment of the office need identified in the 2023 update with the original 2018 ELR.

Table 5.25 Swale office balance – comparison 2018 ELR and 2023 update

Forecast (2022-40)	2018 ELR (2016-36)		2023 Update (2022-40)			
			Rerun approach		Scenario	
	Total office	p.a.	Total office	p.a.	Total office	p.a.
	Sq m (GIA)	Sq m (GIA)	Sq m (GIA)	Sq m (GIA)	Sq m (GIA)	Sq m (GIA)
a Net demand	50,089	2,504	48,617	2,701	48,617	2,701
b Gross future losses	40,000	2,000	28,800	1,600		
c Gross gains [a+b]	90,089	4,504	77,417	4,301	48,617	2,701
d Existing stock vacancy adjustment	1,083		5,374			
e Replacing losses	2,545		1,170			
f Gross demand [c+d+e]	93,717	4,686	83,961	4,664	48,617	2,701
Supply						
g planning permissions	22,024		21,844		21,844	
h Plan allocations	35,675		20,000		20,000	
i Supply [g+h]	57,699		41,844		41,844	
j Years' supply [i/f per annum]	12.3		9.0		15.5	
k Balance	36,018	1,801	42,117	2,340	6,773	376
l Final balance (ha)	9.0		10.5	0.6	1.7	0.1

Source: Stantec analysis

- 5.110 This analysis applies a 'rerun' of the 2018 approach and also introduces a scenario that responds to market signals. The rerun produces an office demand and balance figure (requirement) that is very similar to the 2018 ELR. However, increasing the Borough's office floorspace by 42,000 sq m over the Plan period does not align with the market view, nor does it feel realistic given recent past performance and the direction commentators suggest the office market is going. Thus, we consider our much more cautious scenario approach, that more or less considers the office market to be in equilibrium, is the most appropriate approach for Plan-making.

Demand section conclusions

- 5.111 While only a few years have passed since our last report there has been a profound shift in the market due to Covid, and it is sensible to revisit the conclusions and recommendations of the 2018 ELR.
- 5.112 The short-term market data available since 2018 confirms that the direction of travel for our 2018 advice would appear to remain correct. The industrial market has been strong (including logistics) and the office market weak.

Industrial

- 5.113 Industrial (core industrial) demand has been slightly higher than we expected, and land taken up faster. So, in this update the supply has tightened, and demand strengthened. Hence our higher (than 2018) estimate of need as set out in the summary table below. As explained above the more positive approach to assessing demand for industrial floorspace / land is as it was in 2018 the past trends approach, and thus this is what we recommend for plan-making.

Table 5.26 Swale industrial requirement – 2023 update 2022-40

Past trends (projected 2022-40)	sq m
a Gross demand 2022-40	394,593
b <i>per annum (a/16 years)</i>	21,922
c Known supply (see Tab 5.4)	203,578
d Requirement (a-c)	191,015
e Requirement (ha) (c*40%)	47.8
f Margin (ha) (see tab 5.5)	24.9
g Final requirement (ha) (e+f)	72.7

Source: Stantec analysis

- 5.114 There is an issue regarding the margin, the need for this given the large stock of sites and pipeline. The margin is equivalent to a quarter of gross demand³³ over the plan period, and accounts for just over one-third of the new land required. Our advice is that the Council should allocate the margin, but not at the expense of other alternative uses where there is more certain demand in the shorter term.
- 5.115 Pragmatically the Council could view the 47.8 ha (of new land) as the minimum needed for the plan period, but our higher requirement (inclusive of the margin) as the target to aim for. Either way we suggest take-up should be closely monitored, and should this be more rapid than anticipated – as it has in the recent past, then more land be allocated through Plan Review.

Offices

- 5.116 For offices the 'direction of travel' has shifted significantly from the 2018 assessment. The long-standing weak performance of the office market, coupled with the shock of Covid and its aftermath has pulled the assessment substantially downwards. The latest past trends and forecast approaches broadly align, suggesting the market is at equilibrium at best if not likely to contract a little.
- 5.117 In 2018 we recommended the past trends approach, but this time we recommend the economic forecast method because this is marginally positive. However, as shown in Table 5.27 below the economic based forecast approach with adjustments required in response to the market assessment, means the requirement – the need for new office floorspace is virtually zero, in effect our assessment is saying that over the Plan period office floorspace is likely to remain at today's quantum. This does not mean there will be no new office / hybrid space, there will be as low-level demand requires, but this will be balanced by the continued loss to other uses of outdated office premises, with the overall effect broadly in balance.

³³ As referred to at 5.34.

Table 5.27 Swale office requirement – 2023 update 2022-40

Economic forecast (2022-40)	Scenario sq m
a Gross demand 2022-40	48,617
b <i>per annum (a/16 years)</i>	2,701
c Known supply (see Tab 5.4)	41,844
d Requirement (a-c)	6,773
e Requirement (ha) (c*60%)	1.1
f Margin (ha)	0.0
g Final requirement (ha) (e+f)	1.1

Source: Stantec analysis

- 5.118 Swale is not a major office location, it has not been an area in high demand for office-based activity, and this was not due to a lack of planned supply. There is no suggestion that simply allocating additional office land will or could adjust this trajectory. In line with our previous recommendations any calculated office need should be addressed through flexible allocations that allow hybrid uses, with a light industrial bias that also facilitates smaller office activity.
- 5.119 We are aware that there are ongoing efforts to promote the Kent Science Park and proposals for major extensions to the Park. Our assessment would not support a major office-based extension to the Science Park. But we recognise that the Park is offered as a ‘game changing’ opportunity for Swale – to bring new activity to the Borough in high quality in-demand sectors, and be capable of helping address the issue of the low waged local economy.
- 5.120 As a new commercial offer, scope for Science Park employment would not be reflected in a traditional evidence base documents that uses past trends/forecasts to derive the need assessment. We have previously suggested a ‘with Science Park’ scenario as ‘high risk, but high reward’ and this remains the case. If successful, the Park needs to compete for demand that arises from outside the Borough and attract these science related sectors to Swale. So, the case for the Science Park is less related to Swale’s economic need/demand, and is more a question of whether the Science Park can be viably positioned to compete with others on a regional/national basis in the life sciences sector.

6 Meeting the need for employment land – future supply

Introduction

- 6.1 In this chapter we consider the potential supply to meet the need identified in the preceding chapter.
- 47.8 ha minimum (73 ha target) of industrial land
 - 1.1 ha hybrid office/light industrial
- 6.2 The office requirement, over and above the known existing supply is virtually zero and can be met through policy encouragement for mixed use town centre redevelopments, and local provision in housing-led mixed use schemes elsewhere. We return in the final concluding chapter to the issue of whether the existing supply is suitable to remain the identified supply.
- 6.3 Industrial need is the much greater challenge. First, we consider the existing designated employment sites to explore the scope within these areas to provide net additional employment floorspace. Then we review sites with ‘potential’ - sites that are likely to be attractive to business occupiers / developers because they are in market attractive areas and have the right site characteristics (good road access, no major unsurmountable physical or policy constraints) and that could potentially be designated or allocated as part of future employment land supply.
- 6.4 A large number of ‘possible’ sites have been assessed. The assessments of these and also those for the exiting designated and allocated employment sites are set out in Appendix B. Here we draw on those assessments to consider the scope of the ‘possible’ sites to be allocated for employment use.
- 6.5 The sites are considered grouped within the geographical market areas discussed in the market assessment chapter, with the rural area divided west and east. We have ‘graded’ these sites according to our overview of their potential – sites that are:
- good prospects – ie in a market attractive area, with no major constraint (physical or policy) and have owner enthusiasm!
 - possibles – ie in a market attractive area, but there are major constraints, but these may be overcome
 - unlikely – ie in unproven/marginal market areas and with major constraints that suggest at this stage allocation for employment use would fail the reasonable prospect test.
- 6.6 In the case of the latter ‘unlikely’ sites, it is not for this ELR to categorically rule them in or out, and ultimately this will be a task for the Council to consider in the context of the Local Plan’s wider policy objectives, and through dialogue with the site owner/promoters.

Within existing designated /allocated sites

- 6.7 First, we consider the existing portfolio.

Table 6.1 Land within designated areas available for new employment space

Plan Ref	Name	Developable area (Ha)
S9/10 (incl MU2)	Eurolink Phases i-v	2.7

Source: Stantec

- 6.8 Across the whole employment portfolio, only Eurolink has undeveloped land. At Eurolink there are just two remaining undeveloped parcels – a 1.4 ha parcel south of Bingham Rd and 1.3 ha north of Swale Way. These may have been acquired by existing businesses for future expansion, but given this is in the general market, these parcels can be included in the general supply.
- 6.9 Thus, the area remaining available at Eurolink reduces the minimum industrial need from 47.8 ha to 45.1 ha.

Potential new sites to meet employment land need

- 6.10 Next, we identify the sites that have potential to provide new industrial floorspace. These are identified on the table over the page and are grouped by market area and ‘graded’ into good prospects, possibles and those that we think have major insurmountable constraints.
- 6.11 Table 6.2 below indicates that there are relatively few sites categorised as ‘good prospects’, and these are all comparatively small that collectively could contribute 17.7 ha to the supply. Most are located in the rural west, some are extensions to existing industrial estates that are being actively promoted. There are no sites in the Sittingbourne or Faversham market areas. Collectively these sites reduce the minimum need to 27.4 ha.
- 6.12 The bulk of the land assessed, almost 100 ha is in the ‘possible’ category. Here the land is attractive in terms of employment use, but there are major policy constraints (mostly landscape) that may either rule the sites out or substantially restrict the scale of employment provision that could come forward. These are considerations beyond the remit of this study and will need to be assessed as the Plan rolls forward through detailed site assessment. There is considerable scope to ‘plug’ the minimum need from within the ‘possible’ category (27.4 ha), and indeed to find the additional 24.9 ha margin.
- 6.13 The ‘possible’ category sites include a number in the strongest market area – Sittingbourne, and we recommend all of these are actively pursued by the Council. It may be that on detailed investigation these either fall away or the developable areas reduce, but given there are no good prospect sites in Sittingbourne these sites offer best potential.
- 6.14 Faversham has two very large urban expansion areas promoted – the Duchy land and land East of Faversham, and these include large sites for employment use. Our assessments conclude that these sites are likely to be market attractive for industrial uses, particularly logistics and distribution given their relative ease of access to A2/A299/M2. The land allocation considerations at Faversham are complicated as there are already significant allocations and permissions at Lady Dane and Perry

Court that to date have not been taken up. Indeed, in our view these more recent site promotions identify land that is better suited to the type of industrial use (warehousing) than the land that is currently allocated for office use. In our opinion, if either of the recently promoted sites are capable of accommodating significant employment floorspace then this could in practice reduce or even replace the existing employment land allocations (MU6 and MU7).

- 6.15 As indicated in the table the residential permission effectively rules out land at Wises Lane that otherwise would have been a suitable site for employment use. We include Highsted Park in the table, but consider it unlikely to be needed / come forward due to the policy promoting this site for specialist science park activity, with the objective of providing higher waged job opportunities for the resident population.

Table 6.2 Potential new land

Area / Plan Ref	Name	Potential developable area (Ha)			Positives	Constraints
		Good	Possible	Unlikely		
Sittingbourne			32.6	10.0		
CFS34	Land adj. Kemsley Substation, ME10 2FE		5.0		Strong market area	Questionable how much of ~5 ha site available. Site would wrap around electricity substation
SBC17/005	Land at Pheasant Farm (west), Howt Green, Sittingbourne		1.6		Good market area	Small scale. Not established location.
SBC17/008	Land fronting east side Bobbing Hill, Sittingbourne		1.0		Good market area	Small scale. Not established location.
CFS24 (and R1)	Ridham Dock - redevelopment		25.0		Owner interest Strong market area	Possible loss of wharfage
SBC17/049	Land at South West Sittingbourne (Land At Wises Lane, Borden)			10.0	Good market area	Residential permission means employment likely to be ruled out.
Sheerness / Queenborough		3.7				
CFS47	Land south of Cowstead Farm, Queenborough Road	3.7			Strong market area	Small scale only due to limited site area
Faversham			41.0			
SBC17/094	Land adj to A2 at Love Lane and west of Salter's Lane to Brenley Corner (the Duchy site)		20.0		Large site Likely to be market attractive	Landscape constraints will limit possible scale. Brenley Corner junction issues.
CFS50	Land East of Faversham expansion		21.0		Large site Likely to be market attractive	Landscape constraints will limit possible scale. Brenley Corner junction issues.
Rural west		13.5	5.9	34.0		
SBC17/095	Hartlip Industrial Estate, Hartlip (extension to)	5.9			Good market area. Extension to existing.	None
REG3197	Land at Marshlands Farm, Lower Road, Minster	5.6			Good market area. Being actively promoted. Neighbouring existing estate.	Small scale, but landscape constraints.
REG3044 (R10)	Newington Industrial Estate - southern expansion	2.0			Expansion of existing Good market area	None
SBC17/025	Land at Radfield Farm, London Road, Bapchild		3.0		Likely to attract small/medium sized businesses	Unproven market area. Small scale
SBC17/100	Halfway Egg Farm, Featherbed Lane, Iwade		2.9		Reasonable market area.	Small scale.. Not established location. Access concerns
SBC17/093	Highsted Park			34.0	Large site Likely to be market attractive	Remote from established employment areas and with major access issues. Range of other sites better related to existing employment areas and to the labour force. However, issues could be resolved if comprehensive mixed use development were taken forward. To allocate or not is therefore dependent on a range of other policy considerations, not just employment related.
Rural east		0.5	16.1			
CFSS (R8)	Waterham Industrial Estate - expansion east	0.5			Extension to existing	Weaker market area
30	Dargate Plumpudding Lane		12.9		Owner interest	Unproven market
LPR2470 (R15)	Lamberhurst Farm,Yorkletts - proposed southern expansion		3.2		Expansion of existing	Landscape constraints will limit possibilities. Unproven market.
Total		17.7	95.6	44.0		

Source: Stantec

7 Conclusions and recommendations

Conclusions

- 7.1 Since the 2018 ELR was prepared much has changed in terms of the macro-economic outlook and the planning policy background.
- 7.2 In this 2023 update we review the conclusions reached by the 2018 ELR in terms of how much land is needed to plan positively for employment growth and where that land should best be located. This study will provide the economic evidence to ensure the policies in the forthcoming Regulation 19 draft Local Plan for the 2022-38 period are soundly based.
- 7.3 The combination of the Covid pandemic that super-charged the logistics and distribution sector (and reduced the demand for office space), and more positive national planning policy guidance for the warehouse sector, has led to higher demand for the logistics/distribution sectors and industrial activities, especially in areas already attractive to those uses.
- 7.4 The 2018 ELR identified a strengthening industrial market, with recent evidence of large regional logistics/distribution firms locating in Swale. At that time the Borough had a substantial pipeline of industrial land supply, but needed a further 41 ha in order to satisfy future industrial demand over the Plan period. The need was not for the short-term, as the existing supply can manage that, and because the bulk of the medium to longer term need was for larger logistics/distribution this would focus on Sittingbourne / Isle of Sheppey.
- 7.5 For offices the 2018 study identified a weak Borough market (and indeed across Kent more generally), with what floorspace that had been delivered in recent years being hybrid flexible space, able to adapt and function as either office or light industrial workshop space. The requirement for hybrid office space was identified as 15 ha over and above the pipeline of existing supply (largely the same as 2023 supply). The hybrid space was considered to most likely be needed in Faversham.
- 7.6 To meet the 41 ha industrial shortfall the 2018 ELR identified at a number of broad areas of search that could potentially provide new employment space in the longer term.
- 7.7 This present study firstly considers Swale's economy as a whole, and then recalibrates the need figures to the new plan end date 2040, and looks in greater detail at where future need could be met.

The Swale Economy

- 7.8 The total number of jobs relative to the resident workforce continues to lag behind other areas, and wages for those employed in the Borough are significantly lower than those employed elsewhere. Thus, while there has been a marked improvement in workforce qualifications, the Borough's economy remains characterised as lower waged, and compared to most other areas of Kent has a lower overall number of jobs.
- 7.9 The Borough's economic strengths are in the manufacturing, transport/storage and

construction sectors, and the relative under-provision in jobs is concentrated in the office-based sectors.

Demand for employment land and floorspace

- 7.10 While only a few years have passed since our last report (2018) there has been a profound shift in the market due to Covid, and we see this in the quantification of demand through the labour market and the delivery of space, and also through our analysis of the property market, which for some time has been very 'tight' with low availability and rapid take-up. In contrast the office market remains weak with very low levels of occupier / developer interest.
- 7.11 To date the demand for, and take-up of industrial land has been stronger and faster than was anticipated in 2018. The strategic distribution market continues to dominate space requirements, particularly for retail and 3PLs, but also manufacturing and freight and wholesalers, albeit demand has cooled a little from the levels seen in the pandemic. While there are better locations in Kent for logistics and distribution facilities, because of the general lack of sites suitable supply, new site allocations are needed in Swale (and elsewhere) to meet demand for strategic and local logistics/distribution space.
- 7.12 Thus, with strong take-up of the available supply of industrial land in recent years, supply is now reduced, and the updated requirement is consequently higher at 73 ha – albeit this is demand of 48 ha, plus a margin of 25 ha. The need to identify land to supply the margin is optional and not necessary in the short-term given there remains 9 years' land supply in the pipeline, but recent past trends in delivery have been very strong.
- 7.13 Pragmatically the Council could view the 48 ha (of new land) as the minimum needed for the plan period, but the higher 73 ha requirement (inclusive of the 25 ha margin) as the target to aim for. The Council could allocate the additional 25 ha, but should there be the need to use the land to provide for other alternative uses in the short-term, that should take precedence. Either way we suggest take-up should be closely monitored, and should this be more rapid than anticipated – as it has in the recent past, then this margin land should be allocated through Plan Review.
- 7.14 The requirement for offices has shifted significantly since the 2018 assessment. Both the demand and the availability of office space remain low and broadly in balance, with office-based businesses serving essentially a local market. Rents are insufficient to stimulate viable development and the long-standing weak performance of the office market, coupled with the shock of Covid and its aftermath has pulled the assessment substantially downwards.
- 7.15 The latest need assessments for offices (economic forecast and past trends in completions) broadly align, suggesting the office market is at equilibrium, but could equally contract a little. This means that the unmet need for new office floorspace is just 1.1 ha; virtually no requirement. In effect our assessment is that over the Plan period office floorspace is likely to remain in quantitative terms where it is today, albeit there will be new office / hybrid space, but this will be balanced by the continued loss to other uses of outdated office premises. The focus should remain on the refurbishment of existing stock and/or providing good quality flexible light

industrial/hybrid space.

- 7.16 We also note that the life sciences sector continues to grow, and is able to offer the type of higher value jobs that the Borough needs to drive up workplace wages and reduce out commuting.

Meeting the need for employment land

Office

- 7.17 There is no need to allocate more land to meet the need for future office/hybrid space, and it is appropriate to consider whether the existing allocations that in aggregate meet the identified need remain fit for purpose.
- 7.18 As set out in our sites' assessments (Appendix B) our view is that the prospects for traditional office on the scale currently envisaged at the two allocated sites – Perry Court and Lady Dane Farm (both Faversham) - is for the reasons set out in his report very unlikely now or at any point over the Plan period. We do consider both sites attractive for industrial uses including an element of the hybrid light industrial / office flexible space, but only a quantum to provide for the local walk to work market. Further whereas both these sites currently constitute the extent of the expansion of urban Faversham, should other options for future growth (to the east and south-east) be taken-up then those locations would be likely to better serve the industrial market, while also providing opportunity for an element of hybrid flexible space as part of developing mixed-use communities. Thus, within the context of a revised development strategy it may be appropriate to rethink the sites allocations.
- 7.19 Delivering future provision of hybrid office/ light industrial space should also be encouraged more broadly, so that provision can be delivered throughout the Borough. This should be encouraged through town centre redevelopment, the provision of an element as part of housing-led mixed-use developments and when light industrial sites are recycled.

Industrial

- 7.20 Turning to the supply to meet the industrial need, we note that the only land that remain available are two small parcels at Eurolink. Thus, 45 ha of additional land is needed to accommodate the minimum industrial requirement, and this expands to a 70 ha requirement inclusive of the margin. An important consideration for the potential supply of industrial land is its geographical distribution; ensuring that as far as possible land is provided where it is most needed and accessible to the Swale labour force, which in geographic terms means a focus on the western side of the Borough and particularly in Sittingbourne/Isle of Sheppey. This is also where the market wants it to be, to improve market efficiencies.
- 7.21 Our review identifies only a relatively modest number of sites that have good prospects, i.e. likely to be market attractive and with no major designation or physical constraints to employment development prospects. Collectively the 'good prospect' sites total 17.7 ha and are mostly on the western-side of the Borough. Beyond this there are ten sites in the 'possibles' category that collectively could provide almost 100 ha of employment development land. In addition, we identify Highsted Park and Wises Lane as 'unlikely'. Wises Lane because there is an extant permission for

residential that we anticipate will be delivered, and Highsted Park for three reasons. Firstly, as matters stand it is our view that Highsted Park is remote and poorly connected compared to all the sites referred to as 'possibles', and these are preferable locations for employment use purposes for the reasons set out in Appendix B. Secondly, the provision of a number of sites provides choice in the market and also potentially provides opportunity in different parts of the Borough. Thirdly, Highsted Park is needed to deliver high quality life science jobs and not the type of 'normal' jobs available in the general supply and for which the Local Plan must identify land.

Policy Recommendations

- 7.22 This report provides employment evidence and makes site related recommendations based on economic need and our view on market attraction. It will be for the Local Plan in allocating land to consider these sites in the round.
- 7.23 The specific policy content recommendations set out in the 2018 ELR still stand, and below we set out the specific recommendations for how much land the Plan should identify for employment purposes based on the outputs of this study.

Industrial

- 7.24 **Recommendation 1:** The industrial requirement sums to 73 ha, but 48 ha is the minimum, required to deliver on trend. The remaining 25 ha is for margin, and does not necessarily require the identification of land in the short term due to existing supply.
- 7.25 Plan monitoring will determine if land is required in the medium to longer term, and decisions can be made through the monitoring as to whether land remains/is allocated for employment use. Should land not be allocated for the margin initially, but take-up be more rapid than anticipated – as it has been in the recent past, this would suggest land to deliver the margin should be allocated through Plan Review.
- 7.26 **Rationale:** in line with the 2018 ELR the past trend approach to identifying need is the most positive, aligns with the market assessment and is therefore considered the most appropriate means of identifying the requirement – the 48 ha plus 25 ha margin totalling 73 ha. Because there is existing supply, and some land with good prospect there is no absolute need to allocate land at this stage to deliver the margin.
- 7.27 **Recommendation 2:** Allocate land to deliver the 48 ha requirement. This reduces to a requirement of 45 ha when capacity at Eurolink is accounted for. We identify sites with good potential to provide additional supply that sum to 17.7 ha, but none of these sites are in the areas of highest demand – Sittingbourne. A further minimum rounded 30 ha needs to be identified to provide the minimum quantum of land to meet the minimum requirement. Where possible this should include some land in Sittingbourne and Isle of Sheppey, and there are sites identified as 'possible' in our assessment of supply.
- 7.28 **Rationale:** The focus of meeting need should be on distributing the land opportunities to best address the labour market needs – and this is best achieved by increasing general market employment opportunities in the main urban areas for the semi-skilled who make up the bulk of the workforce.

Offices

- 7.29 **Recommendation 3:** In line with our previous recommendations the identified additional office need (1.1 ha over the whole Plan period over and above existing allocations) should be addressed through policy support and flexible allocations that allow hybrid uses, with a light industrial bias that also facilitates smaller office activity.
- 7.30 **Rationale:** Swale is not a major office location, it has not been an area in high demand for office-based activity, and this has not been due to a lack of planned supply. The demand assessment shows that the existing land allocations are sufficient to meet forecast growth. There is no suggestion that simply allocating additional office land will, or could stimulate the market. However, there is evidence of a market for hybrid office / light industrial space and this is likely to be most prevalent in Faversham as it has in the past.
- 7.31 **Recommendation 4:** The land currently allocated to provide for office uses (two allocations in Faversham) should be reviewed. This is in light of the changing nature of demand for such space and the future strategy for growth at Faversham.
- 7.32 **Rationale:** it is likely that the existing allocated sites would be more suited to an element of hybrid flexible space but more generally industrial uses. In the context of the possibility of a different strategic approach to growth in Faversham, it may be that where employment uses are planned may change.

Permitted development / Article 4

- 7.33 **Recommendation 5:** Class MA activity should be kept under review to monitor if Article 4 Directions might be needed to protect the integrity of the Borough's employment sites.
- 7.34 **Rationale:** While the Borough has to date not seen significant volumes of PDR office to residential, that is not to say it will not see such in the future. The changes introduced by Class MA and further relaxation heralded in the Government's current consultations means commercial areas could in the future be under threat.

Kent Science Park

- 7.35 **Recommendation 6:** Maintain policy support to deliver high quality life sciences jobs at the Kent Science Park.
- 7.36 **Rationale:** life science jobs would be the opportunity to bring new activity to the Borough, high quality in-demand sectors, and be capable of helping address the issue of the low waged local economy. This would be a 'high reward' but there is 'high risk' with such an approach because there taking the risk and identifying a supply of space to offer, the site is not as attractive as an inward investment. It is clear that the evidence does not support the provision of general market office-based activity at the Science Park.

Appendix A Schedule of the supply pipeline

Industrial pipeline

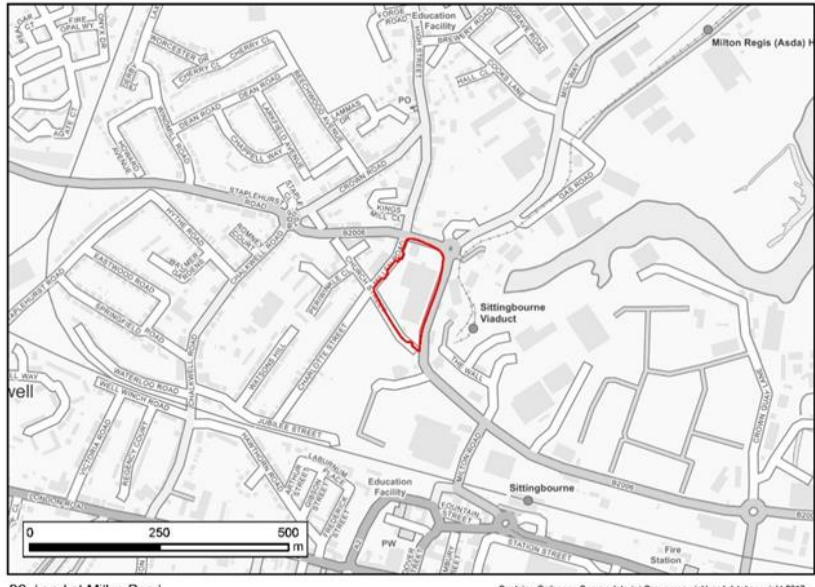
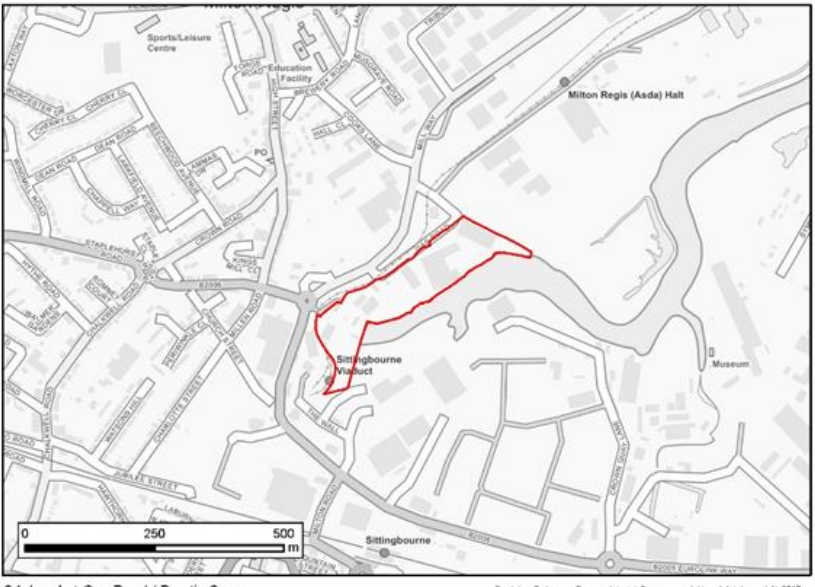
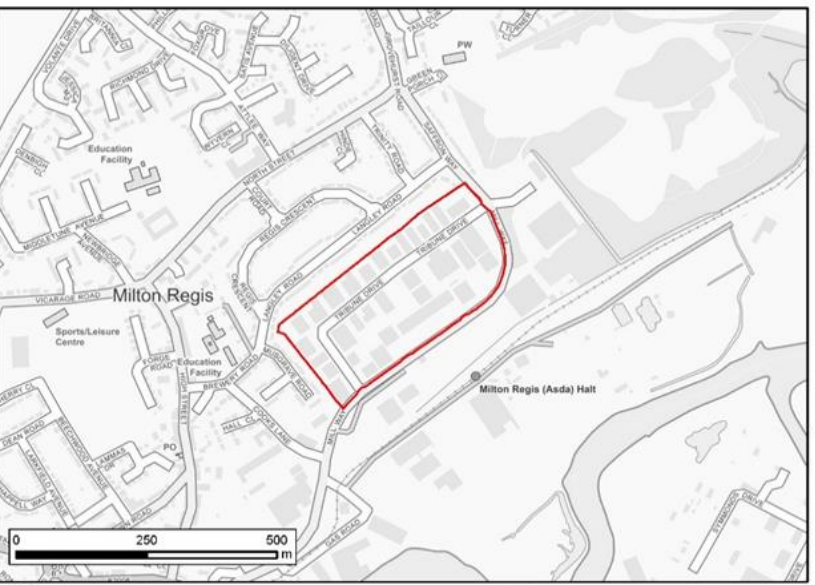

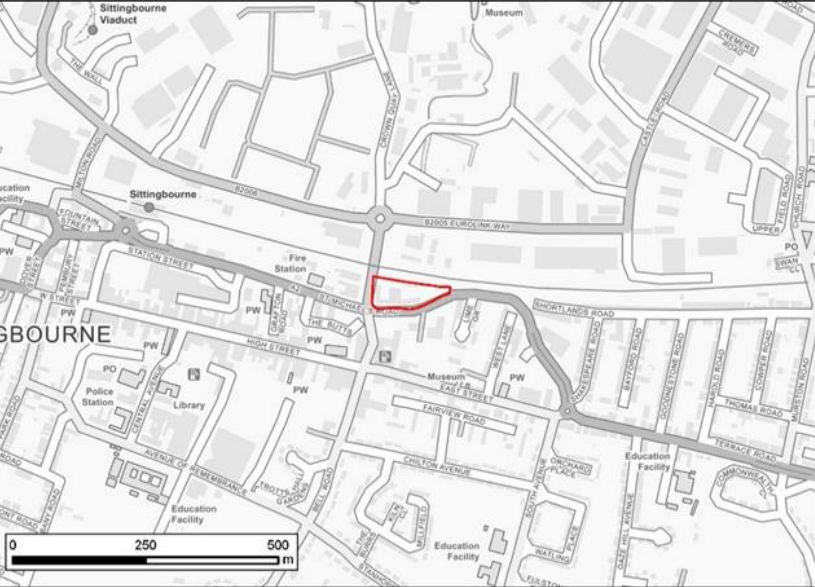
Pipeline	Sq m
Planning permissions	
Wienerberger, Smeed Dean Works, Church Road	7,000
Land east of Love Lane	5,385
Land SE of A299 / adj Thanet Way Highstreet Road	3,060
Land SE of A299 / adj Thanet Way Highstreet Road	3,060
Kemsley Fields Business Park, Ridham Dock Road	2,880
Land At Perry Court London Road	2,850
Land at Queenborough Road	2,100
New Road Garage, New Road	2,076
Faversham Rail Yard, Station Road	1,910
Land at Queenborough Road	1,548
Wallend Farm, Lower Road	1,264
Land South of A299 Slip, Thanet Way	1,170
Lenham Storage, Unit 22, Castle Road	1,025
Dolphin Park, Cremers Road	1,017
Marshall's Mono Ltd, Castle Road	625
Milstead Manor Farm, Manor Road	468
Land adj. Waterham Business Park, Highstreet Road	465
Bennett Opie Ltd, 90-92 Chalkwell Road	355
Unit 14-17 Craft Marsh Trading Estate, Gas Road	337
Unit D8, Bonham Drive, Eurolink	295
Marshall's Mono Ltd, Castle Road	190
Ham Farm, Ham Road	163
Land r/o Drywall Industrial Estate, Castle Road	150
Unit 1, Castle Road Business Precinct, Castle Rd, Eurolink	114
Masters House, Trinity Road	83
Planning permissions	39,590
Plan allocations	
Ridham & Kemsley	64,476
Neats Court	38,272
south of Kemsley Mill	8,000
land at West Minster	7,500
land at Selling Rd	6,300
land east of Faversham	7,000
land at Cowstead Corner (S)	5,600
land at Frogall Lane	26,840
Plan allocations	163,988
Total supply (GIA sq m) [o+p]	203,578

Office pipeline

Pipeline	Sq m
Planning permissions	
Office	
Land At Perry Court London Road	11,875
Land east of Love Lane	2,000
Land at Queenborough Road	1,548
Sheerness Dockyard Church	875
Land At Oare Gravel Works Ham Road	873
Unit B1, Castle Road, Eurolink	310
Sheppey Hall, Main Road	164
Milstead Manor Farm, Manor Road	105
Units 1C/2C, Brickmakers Ind Est, Eurolink	98
Dolphin Park, Cremers Road	85
Brogdale Farm, Brogdale Road	60
The Castle Tavern, 210 High Street	51
R&D	
Land At Perry Court London Road	3,800
Planning permissions	21,844
Plan allocations	
Lady Dane Farm	20,000
Total supply (GIA sq m) [o+p]	41,844

Appendix B Site assessment proformas

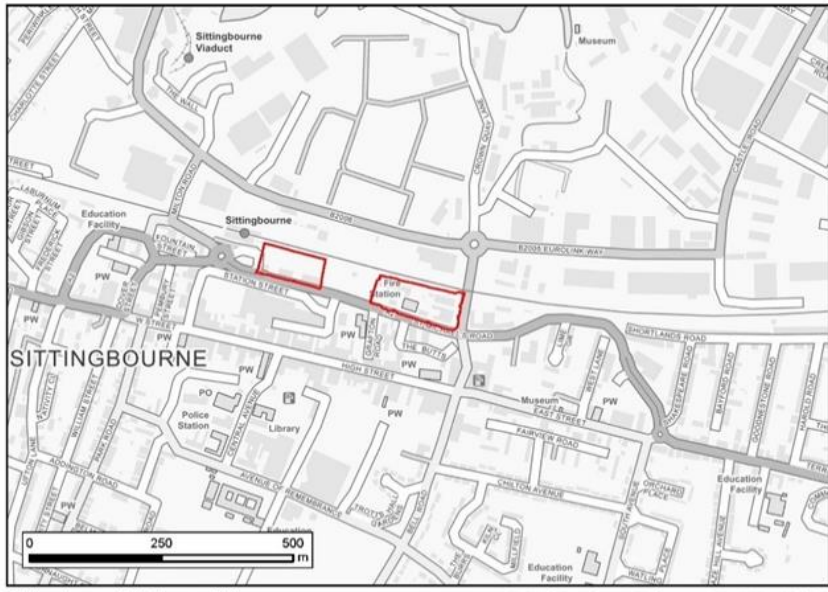
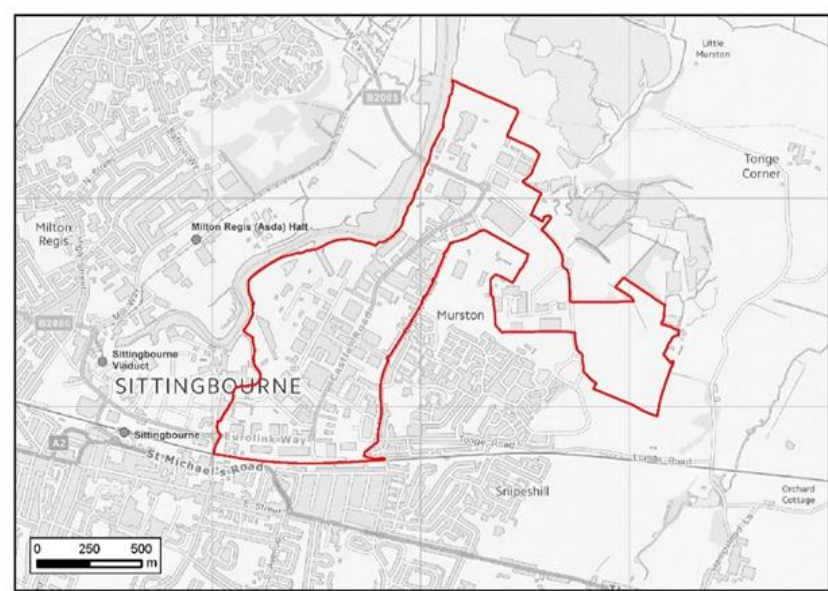
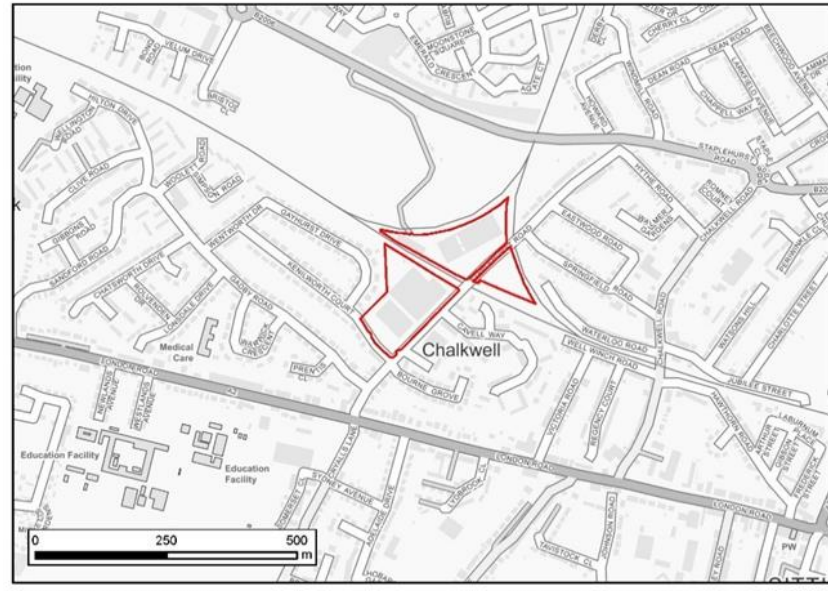


EXISTING EMPLOYMENT AREAS

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
BASIC INFORMATION										CONSTRAINTS		ATTRACTIVENESS TO OCCUPIERS				Internal environment	
Site ID.	Site name	Site location map	Market area	CP1 site? Existing Strategic Emplt locations	Site description	Site area (ha)	Primary type of employ-ment	Site's sequential location	Current relevant planning	Detail any constraint(s) to intensification / expansion	Bad neighbour impact	Prominence of site	Compatibility with surrounding uses	Access to amenities (nearest centre km)	Score	Layout, parking, servicing, landscaping etc.	Score
S2	Land at Millen Road		Sittingbourne	No	Warehouse units and car sales unit to the north of Sittingbourne Retail Park and town centre. Three main occupiers: a steel products supplier, builders merchants and car sales.	1.7	Storage and Distribution (B8)	Within 400m of town centre	None	The site is in EA FZ 2/3, and redevelopment would need to reduce the risk of flooding.	None	High - on a major junction into the town centre. Frontage currently occupied by car sales.	No major issues as neighbouring uses are industrial and the surrounding road network provides a separation buffer from more distant housing.	Good - given close proximity to both the retail park and the town centre.	Good	Traditional sheds layout with plenty of staff/customer parking and space for delivery vehicles. Minimal landscaping.	Good
S4	Land at Gas Road/ Prentis Quay		Sittingbourne	No	Heavy industrial area with manufacturing and material recovery operations prominent. The site is bounded by Milton Creek, the Light Railway and Milton Pipe works.	3.7	General Industrial (B2)	Within 400m of town centre	None	The site is in EA FZ 3, and redevelopment would need to reduce the risk of flooding. The site is isolated and suitable for heavier industries.	None	The site has low prominence, and heavy industrial activities are well screened by the light railway and the landscape buffer.	Neighbouring uses are compatible with heavy industry.	Reasonable, given proximity to both the retail park and the town centre.	Reasonable	A very poor quality environment that results from the heavy industrial activity with most sites and compounds surrounded by palisade fencing. Parking and servicing generally on-site and adequate.	Very Poor
S5	Trinity Trading Estate		Sittingbourne	No	A purpose built trading estate to the north of Sittingbourne town centre dating from the 1970s that fronts on to a busy route into the town centre. A number of the roadside units have changed to trade counters, and a local college occupies a unit for training purposes.	8.9	General Industrial (B2)	Within the built up area	None	Residential to the north and west. The site is in EA FZ3, and redevelopment would need to reduce the risk of flooding.	Minor	High prominence on a popular route into the town centre.	Generally good as although the estate backs on to residential on two sides it is largely self contained.	Foodstore immediately adjacent, but Retail Park and town centre 1 km distant.	Reasonable	Mostly adequate, but insufficient on-site parking leads to a lot of roadside parking which will impact on access for the large vehicles.	Reasonable
S6	East of Crown Quay lane		Sittingbourne	No	Bounded by Milton Creek and with large areas of open storage, buffering the heavier industrial uses to the east. The existing uses are dominated by building material providers. Adjacent sites have been redeveloped for residential.	6.4	Light Industrial (B1c)	Within 400m of town centre	This site is part of the wider area allocated for residential / open space provision under Policy A9 (Land at Crown Quay Lane).	Allocated for non-B class uses is the major constraint. Within EA FZ3.	None	Low, because it backs on to Milton Creek.	The site's current low intensity consumer facing/open storage uses provide a buffer between the cement works to the rear of the site, the scrap yard and Europark to the east, and the new residential to the west.	In town centre 400 m.	Good	Poor quality environment because of conditions associated with the cement works. Plenty of parking and servicing space at the building materials and the timber yard.	Poor
S7	Former Seeboard yard and offices, St Michael's Road		Sittingbourne	Yes	Office building with D2 leisure and retail bounded by the railway and the A2.	0.6	Office (B1a)	In a town centre	None	The site is part within EA FZ3, and redevelopment would need to reduce the risk of flooding.	None	High, at a busy junction on the A2.	Good, neighbouring retail and residential.	Short walk to main part of town centre.	Good	The building fronts the site boundary with parking and servicing areas to the rear, which given the town centre location look sufficient.	Good

EXISTING EMPLOYMENT AREAS

1	2	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34
BASIC INFORMATION		Strategic accessibility (road)		Local access by road	Score	Public transport access		Score	Vacancy	Vacancy Score	Other market intelligence e.g. market history, competing supply nearby, occupiers known to be moving in/out,	Score	REVIEW / RECOMMENDATION				
Site ID.	Site name	Proximity to Mway/ principal roads [kms]	Score	Site junction and quality of access to the principal road network		Is the site close to a railway station (within 400m)?	Station name, number of bus stops within a 400 m radius						If the site retains its current use, will it be occupied?	Are there opportunities for redevelopment / intensification / extension?	Are there any constraints on redevelopment / intensification / extension?	When are these constraint(s) likely to be resolved?	Recommend-ation
S2	Land at Millen Road	A249 junction 1.6 km & J5 M2 6.1km		Site access is off Millen Road, which is likely to be tight for larger vehicles. The B2006 that links with the A249 passes through a residential area.	Reasonable	No	36	Excellent	None	Nil	Warehouse units slightly dated, but appear to be well occupied. Units are small which is attractive to local occupiers. Units are likely to be re-occupied if current occupier were to relocate.	Good	Yes	The site frontage, currently occupied by the car showroom could be a redevelopment possibility, but is a small site.	No	N/A	Safeguard
S4	Land at Gas Road/ Prentis Quay	A249 junction 1.9 km & J5 M2 6.4km	Reasonable	Site has three access points on to the B2005, which is adequate for large vehicles, but the route to A249 passes through a residential area.	Reasonable	No	21	Good	None	Nil	Units are well occupied. Some of the units are bespoke and some are quite dated. These units may have longer voids if occupiers leave, compared to more desirable locations in Sittingbourne. If existing units cannot be re-used, the site will be suitable for redevelopment and will remain attractive to B2/B8 occupiers.	Good	Yes	The site and its surroundings lends itself to the dirtier industrial activity, and is therefore a good site if these activities need to continue to be located in the town. The built form is densely developed, so little opportunity to expand the industrial floorspace.	The Light Railway may constrain redevelopment on the northern side.	N/A	Safeguard
S5	Trinity Trading Estate	J on A249 2.5km & J5 M2 7.0km	Poor	The site has good access onto the B2005, and this route is adequate for large vehicles. The route on the B2006 to A249 passes through a residential area.	Reasonable	No	24	Good	Low vacancy. Available units are generally small.	Low	Second largest industrial estate in Sittingbourne. The estate has seen multiple phases of development and is the favourable location for trade counter and manufacturing sectors. The units are generally more affordable than Eurolink. The estate, though in some areas dated, is generally in reasonable condition and should be occupied throughout the plan period.	Good	Yes	There has been considerable recycling of units within the site in recent years, especially to trade counters, but also for industrial units where higher eaves heights have been a feature of the new units.	None	N/A	Safeguard
S6	East of Crown Quay lane	J on A249 3km & J5 M2 7.5km	Poor	The site has good access onto the B2005, and this route is adequate for large vehicles. The route on the B2006 to A249 passes through a residential area.	Reasonable	No	6	Poor	None	Nil	Stock is dated, and in some cases is in poor condition, coming to the end of its economic life.	Reasonable	No	Whilst the site could have been used to buffer the heavier industrial uses from new residential uses, its new Plan allocation removes the site from B class use.	Yes, the Local Plan residential/ open space allocation.	N/A	Allow managed release
S7	Former Seaboard yard and offices, St Michael's Road	J on A249 (with A2) 3km & J5 M2 7.1km	Poor	Principle road access is less critical for an office use, and the A2 route to the A249 passes through the town centre and residential areas.	Reasonable	Yes	45	Excellent	Small allocation, a number of smaller sized units available	Middling	There have been vacant office units within this allocation for a number of years. The stock is dated, but rents are affordable. The location is attractive to occupiers, but the units would benefit from refurbishment within the plan period. But this would only be an option if there is enough demand and development is viable.	Reasonable	Hard to tell	Given the location's proximity to the railway station and the town centre this would be a good site for redevelopment should development be viable.	None other than some floodrisk.	Available in the Plan period	Safeguard

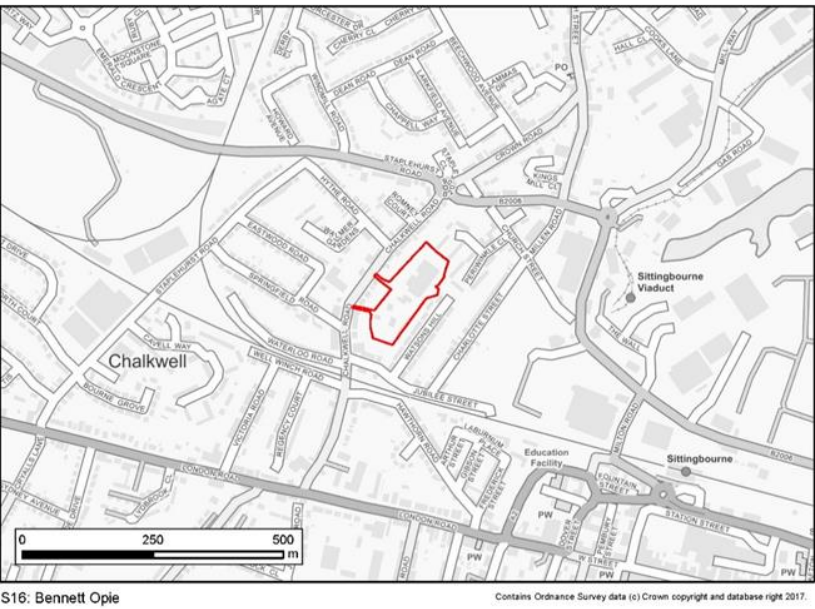
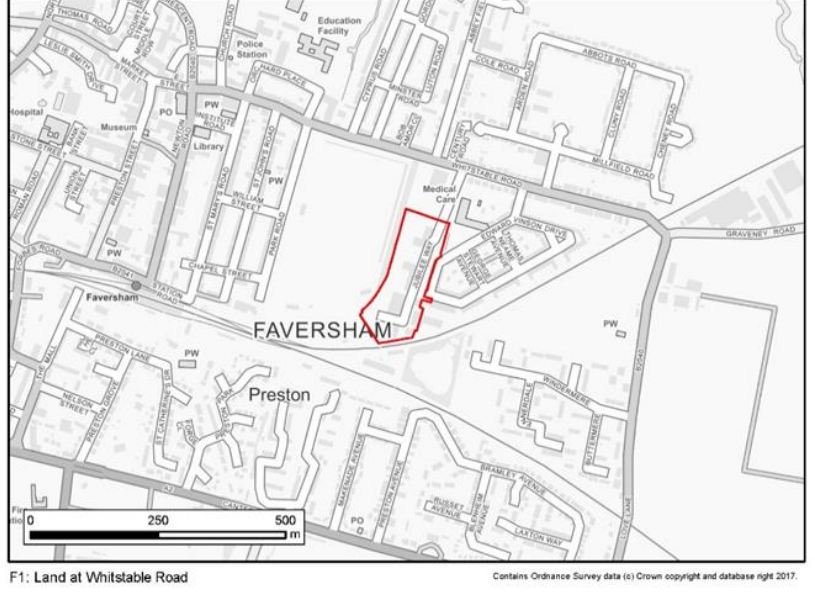
EXISTING EMPLOYMENT AREAS

1 2 BASIC INFORMATION		3	4	5	6	7	8	9	10	11 CONSTRAINTS	12	13 14 ATTRACTIVENESS TO OCCUPIERS <i>External environment</i>		15	16	17 <i>Internal environment</i>	18
Site ID.	Site name	Site location map	Market area	CP1 site? Existing Strategic Emplt locations	Site description	Site area (ha)	Primary type of employ-ment	Site's sequential location	Current relevant planning	Detail any constraint(s) to intensification / expansion	Bad neighbour impact	Prominence of site	Compatibility with surrounding uses	Access to amenities (nearest centre km)	Score	Layout, parking, servicing, landscaping etc.	Score
S8	Land around Sittingbourne Station		Sittingbourne	Yes	Car repair and B2 use site under construction adjacent to railway station, separated from fire and ambulance station by a car showroom.	1.8	Other	In a town centre	Recent gain of 134sqm of B2 floorspace.	None	None	High, on the A2 next to the station.	Good, no incompatible uses.	Short walk to main part of town centre.	Good	The buildings front the A2 with parking to the rear. Constrained site, so little landscaping.	Reasonable
S9/10 (incl MU2)	Eurolink Phases i-v		Sittingbourne	Yes	Sittingbourne's largest industrial estate providing a range of premises and activities focused on the Eurolink and Castle Rd spine roads. Broad range of activity from the long established heavy industrial activity (concrete and material recovery) in open yards adjacent to Milton Creek, to the new high tech engineering buildings off Swale Way. Buildings from early phases of the Estate (which commenced in the 1970s) have and continue to be redeveloped to accommodate modern requirements. Swale Way which links to the A249 has improved access and the Estate's potential significantly. The recently completed V phase included 11.6 ha of employment land with the whole area extending to 51 ha.	198.0	General Industrial (B2)	Within the built up area	The site has been developed in a number of phases since the 1970s. Phase V was designated as 'proposed mixed use', with designated 'safeguarded area of search for Sittingbourne Northern relief road' cutting through and covering the southern half of the site. 2016 planning permission for up to 46,600sqm B1, B2 and B8 (on the western part of the allocation). The Local Plan designation MU2 identifies scope for 43,000 sq m on 11.6 ha.	A small area at the very northern edge of the site is within the Kent Level Area of High Landscape Value, and the area abuts the SPA - international and national designated site of biodiversity &/or geological value.	None	High, due to scale and compact nature.	Good, the boundaries are generally Milton Creek, the railway and distributor roads. Some residential on the eastern side.	Generally poor - limited on-site provision. Town centre 1.5 kms from the middle of the Estate.	Reasonable	Generally the layout is good with the tree lined avenue Eurolink Way presenting an attractive entrance from the town centre side. All the newer areas have allowed more room for landscaping which improves the setting of the buildings. No evidence of parking or servicing issues.	Good
S12	Land at Staplehurst Road		Sittingbourne	No	Three land parcels either side of the railway surrounded by residential. The triangular site to the north of the railway has planning permission for 18 dwellings. Current planning application for 52 dwellings for the northern parcel. South of the railway and east of Stapleford Road there are light industrial units that could be included in the cluster along with the designated light industrial on the western side of Stapleford Road. The 3.9ha site area includes the two northern parcels.	3.9	Light Industrial (B1c)	Within the built up area	Eastern triangular parcel is a loss of 4800 sq m. Northern parcel if permitted would result in the loss of 42,740 sq m.	Predominantly residential area. Stapleford Road residential in nature.	Minor	Poor - Stapleford Road is not a main route and is largely residential.	Backing on to the railway, but has neighbouring residential.	Some facilities on the A2, but the town centre is 1.5kms.	Poor	The buildings respect the context, and are not dominant. Parking and servicing is off-site and appears adequate. The southern parcel lacks a landscaped screen, but the buildings are not dominant.	Reasonable
S13	London Road Trading Estate		Sittingbourne	No	A small industrial estate located just off the A2.	1.0	Light Industrial (B1c)	Within 400m of town centre	None	Surrounding residential.	Minor	Low - site is hidden behind an office building fronting the A2.	Residential in close proximity.	Good - the town centre is close by.	Reasonable	Small units arranged around a large central courtyard used for parking and servicing. No landscaping.	Reasonable
S14	Watermark Business Park		Sittingbourne	No	Out of centre office development close to the A249/B2006 junction.	1.2	Office (B1a)	Within the built up area	Built in 2008, and was to be a larger office scheme, but remainder of the site (50%) developed for housing instead.	None	None	Middling, on a junction close to the A259, but the route is not major and is mainly a residential area.	Good. Residential neighbouring.	Poor - nothing close by, and the town centre is 2kms.	Poor	Four pavilion office buildings built around a central courtyard used for parking/servicing. Whilst the office units are not full the parking area appears close to capacity.	Reasonable

EXISTING EMPLOYMENT AREAS

1	2	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34
BASIC INFORMATION		Strategic accessibility (road)		Local access by road	Score	Public transport access		Score	Vacancy	Vacancy Score	Other market intelligence e.g. market history, competing supply nearby, occupiers known to be moving in/out,	Score	REVIEW / RECOMMENDATION				
Site ID.	Site name	Proximity to Mway/ principal roads [kms]	Score	Site junction and quality of access to the principal road network		Is the site close to a railway station (within 400m)?	Station name, number of bus stops within a 400 m radius						If the site retains its current use, will it be occupied?	Are there opportunities for redevelopment / intensification / extension?	Are there any constraints on redevelopment / intensification / extension?	When are these constraint(s) likely to be resolved?	Recommendation
S8	Land around Sittingbourne Station	J on A249 (via A2) 2.9km & J5 M2 7.0km	Poor	The A2 route to the A249 passes through the town centre and residential areas.	Reasonable	Yes	51	Excellent	None	Nil	Units are of reasonable quality and are currently occupied by the fire and ambulance service providing strong covenant. There is vacancy in the office allocation (S7) across the road which indicates that there may be limited demand from office occupiers in this area.	Good	Yes	Yes, some redevelopment has taken place, and should the fire/ambulance stations relocate then opportunity for redevelopment to office should this be viable.	None	N/A	Safeguard
S9/10 (incl MU2)	Eurolink Phases i-v	J on A249 (via Swale Way) 3.5km & J5 M2 10.5km. A longer distance than via the A2, but a better quality / appropriate route.	Good	Swale Way is a purpose built route suitable for heavy goods vehicles. The completion of Swale Way that provides a direct link to the A249 has been the catalyst for an acceleration of activity with Phases 4 and 5 adding very large units to the Eurolink stock.	Good	No	3	Poor	Generally low. Available units vary in size, with the majority small under 2,000 sq ft.	Low	Eurolink is the largest industrial area in Swale Borough providing some of the best quality stock in the town. There are a mix of unit types within the estate, with some new smaller units recently being delivered at Precision Business Park. There is strong demand for space and rents and capital values have risen, especially in the newest phases - in some estates by c. £2 psf in the past 2 years.	Excellent	Yes	There are just two remaining undeveloped parcels - south of Bingham Rd - 1.4 ha & north of Swale Way - 1.3 ha.	None	N/A	Safeguard
S12	Land at Staplehurst Road	J on A249 (via A2) 1.5km & J5 M2 5.0km	Reasonable	Access on to Stapleford Road is tight for large vehicles, but the short link to the A249 via the A2 is good.	Reasonable	No	30	Good	The eastern triangular site is cleared and no longer in industrial use. The remaining units are fully occupied.	Nil	Buildings are of reasonable quality. There is limited vacancy in the immediate area and there is a good level of demand for light industrial units. These units likely will be re-occupied should the current occupier re-locate.	Reasonable	Yes	No. The triangular site (1.5 ha) has been lost to residential.	Yes, the neighbouring residential and the suitability of Stapleford Road for large vehicles. Given the constraints if the site became vacant it would be unlikely to get redeveloped for industrial uses, and could be released.	Not in the Plan period	Safeguard
S13	London Road Trading Estate	J on A249 (via A2) 2km & J5 M2 5.5km	Reasonable	Access on to the A2 is through an arch under the office building, which could be difficult for large vehicles, but the servicing generally is by small vehicles. The short link to the A249 via the A2 is good.	Reasonable	No	21	Reasonable	None	Nil	The units are well occupied and in a good location. Likely to be reoccupied if units are vacated by current occupiers.	Reasonable	Yes	Only renewal of what is there.	The access restriction and neighbouring residential.	Not in the Plan period	Safeguard
S14	Watermark Business Park	J on A249 (via A2006) 0.5km & J5 M2 5.0km	Good	Excellent access via Vellum Drive to the B2006 for the short link to the A249.	Excellent	No	15	Reasonable	A number of medium sized units available	Middling	One of few office parks in the Borough. Units good quality, popular and are attractive to a wide range of local occupiers.	Good	Yes	No	No	N/A	Safeguard

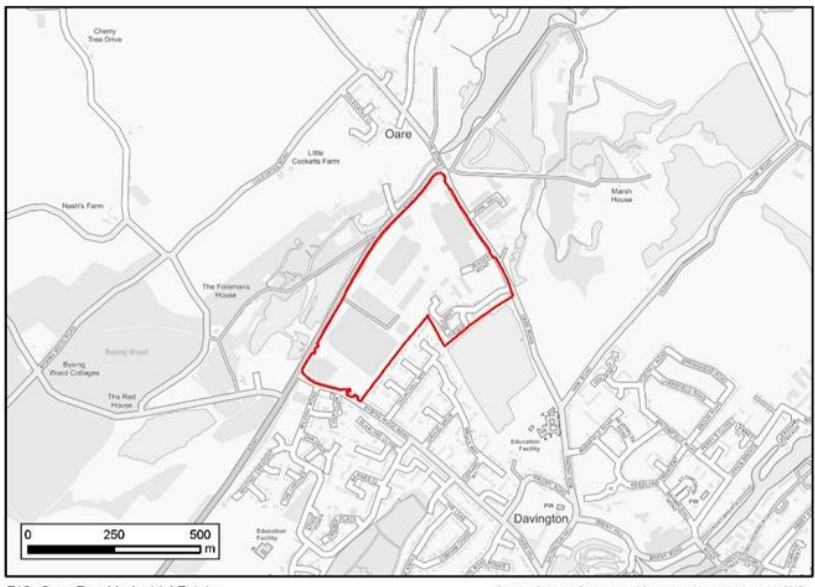

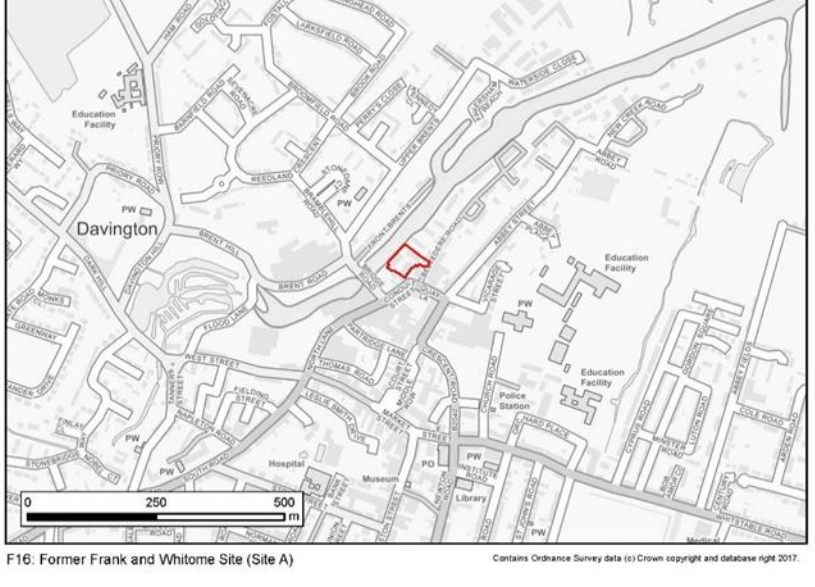
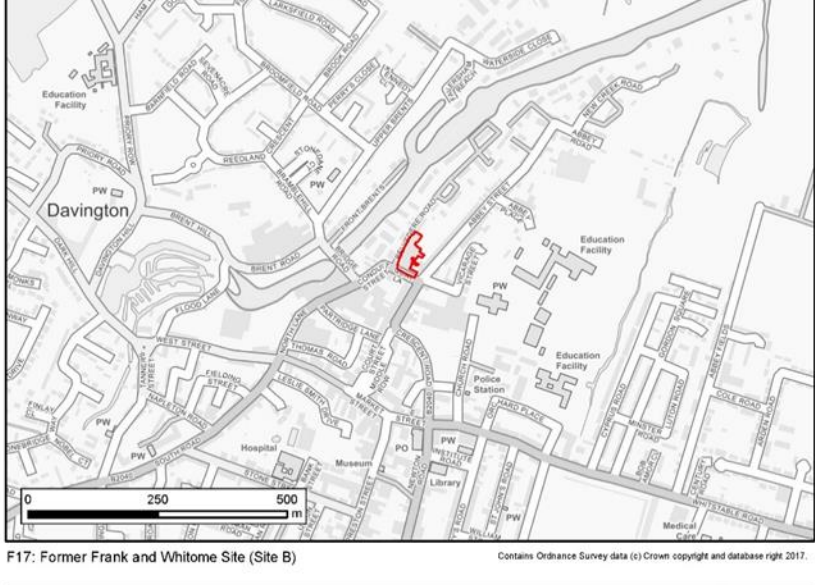
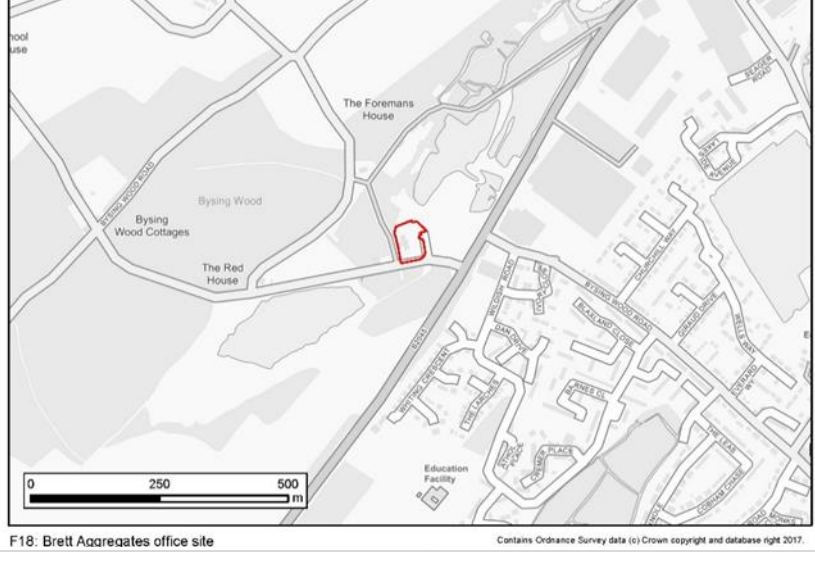
EXISTING EMPLOYMENT AREAS

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
BASIC INFORMATION		Site location map	Market area	CP1 site? Existing Strategic Emplt locations	Site description	Site area (ha)	Primary type of employ-ment	Site's sequential location	Current relevant planning	CONSTRAINTS	Bad neighbour impact	ATTRACTIVENESS TO OCCUPIERS		Access to amenities (nearest centre km)	Score	Internal environment	
Site ID.	Site name											Prominence of site	Compatibility with surrounding uses			Layout, parking, servicing, landscaping etc.	Score
S15	Milton Pipes (East)		Sittingbourne	No	A heavy industrial site, occupied by a pipework manufacturer, metals fabricator and a large car breakers yard. Site bounded by the Light Railway and Milton Creek, and to the northeast by the sewage works and waste recycling centre.	10.2	General Industrial (B2)	Within the built up area	The southern part of the site has permission for a recycling centre from open B8 storage use.	The site is within EA FZ3, otherwise none. The site is isolated and buffered by other industrial uses. These types of uses can generate serious bad neighbour issues.	None	Low. Site is isolated from other areas by the Light railway and Milton Creek.	Good, as these are other forms of heavy and light industry.	Reasonable - Retail Park is 0.8kms, and the town centre 1.2kms.	Reasonable	The site is self-contained in terms of parking and servicing, but internal environment is very poor because of the dirt associated with the industrial processes. The surrounding palisade fencing adds to the unattraction.	Very Poor
S16	Bennett Opie		Sittingbourne	No	Single operator food manufacturer occupying backland site behind residential streets north of the town centre.	1.4	General Industrial (B2)	Within the built up area	None	Surrounding residential.	Major	Very low. Site hidden behind residential.	Potential for conflict.	Reasonable - town centre 0.8 kms.	Poor	A self-contained site, with all parking and servicing on-site.	Good
R1	Ridham Dock		Sittingbourne	No	<p>Safeguarded dock facility on The Swale with heavy industrial processes mostly construction related, such as concrete batching and plaster, and materials recovery and waste management activity. Most activity is open, with the only large building being that needed for waste management.</p> <p>The dock facility is in three parts, and site coverage otherwise is generally low intensity employment uses.</p> <p>Promoter exploring how dock activity could be rationalised and employment activity intensified (CFS24).</p>	45.0	Mixed B uses	Outside the built up area	<p>None</p> <p>Land in Ridham Dock is designated as Safeguarded Wharve. And a Policy CP1 Existing Strategic Employment location.</p> <p>The site is promoted through the 2022 call for sites (CFS24) for allocation for employment uses in addition to safeguarded wharves.</p>	<p>The site is bounded by the Site of Special Scientific Interest, international and national designated site of biodiversity and/or geological value (the SPA).</p> <p>The site is within Flood Zone 2/3</p>	None	Middling - whilst the site is remote, the landscape is flat and the site can be seen from the A249 and other routes.	Good - part of the wider Kemsley Fields Business Park area, with large scale industrial activity.	Nothing in immediate vicinity.	Poor	All activity takes place within the dock compound.	Reasonable
R2	Kemsley Fields		Sittingbourne	Yes	This is a large area bordering The Swale that houses key industrial employers (DM Smith and Knauf), the Morrisons distribution facility and also the OYO Business Centre on the western side of Barge Way. To the east of the DM Smith papermill and bordering the Swale is the former open coal store site now occupied by the Wheelabrator Combined Heat and Power plant.	183.4	Mixed B uses	Within the built up area	Recent planning permissions in the area were for the Wheelabrator permission to the east of the Paper Mill for an energy from waste station that comprises a 2,475 sq m B2 gain, plus the 6,896 sq m generator facility (now completed), and a 5,316 sq m recycling building on Dock Road.	Other undeveloped land to the east of Smiths and adjacent to the Swale is mainly within FZ3.	None	High - the sites are extremely large and visible from the road network.	Largely self-contained, with a large buffer area between Smiths and the nearest residential.	Nothing in immediate vicinity. Businesses likely to be self-sufficient.	Poor	All parking and service activity is self-contained on-site, and activity has been screened through soft landscaping to a degree.	Reasonable
F1	Eurocentre, Jubilee Way/Whitstable Road		Faversham	No	Good quality purpose built office / light indl units to the southeast of the town centre. Some trade counter and other units occupied by children's nursery and vet surgery.	2.3	Light Industrial (B1c)	Within the built up area	None	Residential on land to the east, built at the same time as Eurocentre, is a sensitive use. Planning permission for Eurocentre restricts hours of business and land use to avoid bad neighbour impact.	None	Poor. No road frontage or visibility.	Current activity is clean industrial and office uses that are compatible with the neighbouring residential to the east, on the western side is the Faversham Recreation Ground which does not present non-compatibility issues.	Town centre 700m	Reasonable	Narrow linear site with dedicated and shared parking areas that are at capacity. Not much room for servicing by large vehicles, but the more industrial units have loading bays. Site backs on to recreation ground.	Reasonable

EXISTING EMPLOYMENT AREAS

1	2	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34
BASIC INFORMATION		Strategic accessibility (road)		Local access by road	Public transport access								REVIEW / RECOMMENDATION				
Site ID.	Site name	Proximity to Mway/ principal roads [kms]	Score	Site junction and quality of access to the principal road network	Score	Is the site close to a railway station (within 400m)?	Station name, number of bus stops within a 400 m radius	Score	Vacancy	Vacancy Score	Other market intelligence e.g. market history, competing supply nearby, occupiers known to be moving in/out,	Score	If the site retains its current use, will it be occupied?	Are there opportunities for redevelopment / intensification / extension?	Are there any constraints on redevelopment / intensification / extension?	When are these constraint(s) likely to be resolved?	Recommend-ation
S15	Milton Pipes (East)	J on A249 2.2 km & J5 M2 6.4km	Good	Site access points onto the B2005 via Gas Road, which is adequate for large vehicles. Route to A249 passes through a residential area.	Reasonable	No	6	Reasonable	N/A	Nil	Large yard space and units types- specification suits heavier industry. Limited competition from other areas, as vacancy is generally low in Sittingbourne and there are few estates focused on heavier industry.	Reasonable	Yes	Whilst the site could be redeveloped for other forms of industry, its isolation makes it a good site for heavy industrial uses, especially those requiring outdoor activity & storage.	No	N/A	Safeguard
S16	Bennett Opie	J on A249 1.6 km & J5 M2 6.1km	Reasonable	Site access is off Chalkwell Road, which is residential and tight for larger vehicles. The B2006 that links Chalkwell Road with the A249 passes through a residential area.	Poor	No	33	Good	N/A	Nil	The quality of the units are reasonable but the buildings are bespoke, so it may be difficult to find occupiers if the current occupier vacates. The site is surrounded by residential which may deter some industrial uses.	Reasonable	Hard to tell	None that would lead to an intensification in activity because of the surrounding residential. If the occupier were to leave it is likely the site would not attract an alternative industrial firm.	Yes, the residential	Not in the Plan period	Safeguard
R1	Ridham Dock	J5 M2 11kms. A249 J 1.8kms via dedicated link.	Reasonable	A dedicated (albeit unadopted) route is provided to link to the A249 close to the Sheppey Bridge Crossing.	Good	No	0	Very Poor	None	Nil	With the large Ridham and Kemsley allocation just to the south also with direct access on to the A249, and in between the labour markets of Sheerness and Sittingbourne, this is a good location for industrial and logistics/distribution activity.	Reasonable	Yes	If intensification of employment uses does not conflict with dock related operational activities, this seems a perfectly sensible location for general industrial activities.	Possibly vehicle access	Available in the Plan period	Safeguard/ intensify
R2	Kemsley Fields	J5 M2 8.5kms. A249 J 1.8kms via dedicated link.	Good	Existing A249 roundabouts with Barge Way and Fleet Road offer very good links to the A249.	Good	No	0	Very Poor	None	Nil	The area is large with a number of different uses present. To the east, Morrisons occupy the large distribution units, which are good quality and will be re-occupied were Morrisons to vacate. To the south and the north are DS Smith and Knauf UK. These units are bespoke, and would be unlikely to suit other occupiers. The site is served by a good road network and would be attractive to similar industries over the plan period.	Good	Yes	In addition to the now constructed CHP plant at the Kemsley Paper Mill and the recycling facility on Ridham Dock Road. Yes, two parcels identified in the A1i allocation: i) land to the north of Barge Way - 11 ha site next to Morrisons. Access available on to the Barge Way roundabout. ii) land between Smiths and Barge Way - a 10 ha site that is retained for future potential expansion of Smiths, and therefore is not available for general industrial use.	Smiths likely to need parcel ii for their future expansion plans. Flood risk is the main constraint.	Available in the Plan period	Safeguard
F1	Eurocentre, Jubilee Way/Whitstable Road	J6 M2 3.3kms	Good	The route to the M2 (Whitstable Rd, Love Lane, Canterbury Rd and A251) is narrow in places, especially the Whitstable Rd Railway Bridge, and Love Lane in particular is not suited to large vehicles.	Poor	No	12	Reasonable	None	Nil	Popular estate with both light industrial and office occupiers. This estate is the best example of small industrial units close to Faversham town centre, there is little competing supply near by.	Excellent	Yes	Yes - potential for redevelopment of a 0.3 ha parcel of existing employment land immediately to south west of Eurocentre, adjacent to the railway/footbridge, but not accessible from Jubilee Way. Access is via Station Road. The existing buildings are older poorer quality units, but due to small scale little scope for net additional employment floorspace.	At Eurocentre - yes the conditioned working hours because of immediately neighbouring residential.	Not in the Plan period	Safeguard

EXISTING EMPLOYMENT AREAS

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
BASIC INFORMATION		Site location map	Market area	CP1 site? Existing Strategic Emplt locations	Site description	Site area (ha)	Primary type of employ-ment	Site's sequential location	Current relevant planning	CONSTRAINTS	Bad neighbour impact	ATTRACTIVENESS TO OCCUPIERS		Access to amenities (nearest centre km)	Score	Internal environment	
Site ID.	Site name									Detail any constraint(s) to intensification / expansion		Prominence of site	Compatibility with surrounding uses			Layout, parking, servicing, landscaping etc.	Score
F13	Oare Road Industrial Estate	 <small>F13: Oare Road Industrial Estate</small>	Faversham	No	Home to some very large distributors - Gist that distributes for M&S, East Kent Storage that distributes fruit and Shepherd Neame that benefit from the Western Link road. It also includes the Foundry Business Park on Seager Rd, built around 10 years ago, and providing office/light industrial workshops in a high quality environment.	18.2	Storage and Distribution (B8)	Within the built up area	None	Flood risk (FZ3 applies) to the area closest to Oare Creek, otherwise no constraints.	None	High from the Western Link Road.	Employment area to the north, link road to the west, superstore to the south, but residential to the east.	Superstore 0.5kms and town centre 1.8kms.	Reasonable	Purpose built with good layout and landscape screening from the Link road, and all parking and servicing in dedicated areas (both warehouses and light industrial area).	Excellent
F14	KCC Highway Depot	 <small>F14: KCC Highway Depot</small>	Faversham	No	Irregular shaped highways depot site used for open storage, located to the south of the town centre and the A2.	2.2	Storage and Distribution (B8)	Adjacent to the built up area	None	Site is not adjacent to any other employment activity, and would require upgraded junction to the A2. It is adjacent to a residential area.	Minor	Middling - whilst it has frontage on to the A2, most of the long narrow site is to the rear.	Neighbouring residential could be an issue.	Town centre 1.5kms.	Reasonable	Open storage with ample on-site space for parking and servicing.	Good
F16	Former Frank and Whitome Site (Site A)	 <small>F16: Former Frank and Whitome Site (Site A)</small>	Faversham	No	Historic industrial building adjacent to Faversham Creek. Currently vacant.	0.3	Other	Within 400m of town centre	Allocated in the Faversham Creek Neighbourhood Plan for a mix of uses including employment (office based and light and general industrial)	Access, neighbouring residential and hotel/leisure uses, plus flood risk and the financial viability of revamping the historic premises including a Grade II listed building (Faversham Chandlery) to make it fit for modern needs.	Minor	Low - away from the main industrial or office areas and not on a busy route.	Activity needs to be compatible with neighbouring residential and hotel/restaurant leisure uses. Suitable for creative/craft activity in flexible B1 premises.	Town centre 400m	Reasonable	Belvedere Road is a densely developed area with buildings fronting the highway. Parking and servicing are therefore difficult, and there is little in the way of landscaping.	Poor
F17	Former Frank and Whitome Site (Site B)	 <small>F17: Former Frank and Whitome Site (Site B)</small>	Faversham	No	Historic industrial building adjacent to Faversham Creek.	0.2	Other	Within 400m of town centre	Allocated in the Faversham Creek Neighbourhood Plan for a mix of uses including employment (office based and light and general industrial)	Access, neighbouring residential and hotel/leisure uses, plus flood risk and the financial viability of revamping the historic premises to make it fit for modern needs. Although none of the buildings are listed, the site is surrounded by Grade II listed buildings.	Minor	Low - away from the main industrial or office areas and not on a busy route.	Activity needs to be compatible with neighbouring residential and hotel/restaurant leisure uses. Suitable for creative/craft activity in flexible B1 premises.	Town centre 400m	Reasonable	Belvedere Road is a densely developed area with buildings fronting the highway. Parking and servicing are therefore difficult, and there is little in the way of landscaping.	Poor
F18	Brett Aggregates office site	 <small>F18: Brett Aggregates office site</small>	Faversham	No	Brett Aggregates office building, located in open countryside on the western side of the Western Link.	0.4	Office (B1a)	Outside the built up area	None	Major - The site is within a local designated site of biodiversity and an area of high landscape value	None	Low - located in the countryside.	Low - although there is an old workshop close by occupied by a motor repairs, the area is predominantly open countryside.	Foodstore 0.3kms, and town centre 1.7kms.	Poor	Plenty of space for parking and servicing in a countryside setting.	Good

EXISTING EMPLOYMENT AREAS

1	2	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34
BASIC INFORMATION		Strategic accessibility (road)		Local access by road		Public transport access								REVIEW / RECOMMENDATION			
Site ID.	Site name	Proximity to Mway/ principal roads [kms]	Score	Site junction and quality of access to the principal road network	Score	Is the site close to a railway station (within 400m)?	Station name, number of bus stops within a 400 m radius	Score	Vacancy	Vacancy Score	Other market intelligence e.g. market history, competing supply nearby, occupiers known to be moving in/out,	Score	If the site retains its current use, will it be occupied?	Are there opportunities for redevelopment / intensification / extension?	Are there any constraints on redevelopment / intensification / extension?	When are these constraint(s) likely to be resolved?	Recommendation
F13	Oare Road Industrial Estate	J6 M2 4.7kms (via Western Link, London Road & A251).	Good	The Western Link, London Rd (A2) and A251 provide a good link avoiding the town centre link with the M2, albeit the Ospringe junction on the A2 is pinch point, and traffic passing through the village generates air quality issues.	Good	No	15	Reasonable	None	Nil	The estate has a mix of unit types, with some new units at the Foundry. The Foundry has been popular with light industrial occupiers. The older units are larger and occupied by logistics firms. The location is reasonable and units would likely be re-occupied if current occupiers vacate.	Good	Yes	No	No	N/A	Safeguard
F14	KCC Highway Depot	J6 M2 1.2kms (via Canterbury Road & A251).	Excellent	Vehicles currently access the site on the A2, but more and potentially larger vehicles would require better access arrangements. The route to the M2 is excellent.	Good	No	12	Reasonable	None	Nil	Currently being used as a storage depot. The site would have limed scope for other uses without redevelopment.	Reasonable	Likely	Yes, the site has an advantageous location close to J6 M2, and although modest in scale and not neighbouring other employment areas, could accommodate industrial units. However, its potential redevelopment offers no net gain in employment land.	Yes, improved access arrangements and neighbouring residential.	Available in the Plan period	Safeguard
F16	Former Frank and Whitome Site (Site A)	J6 M2 2.7kms (via B2040/41 and Canterbury Road).	Reasonable	The route to the M2 through the historic town centre (South Lane, Canterbury Rd and A251) is not suitable for large vehicles.	Poor	No	24	Good	Yes	100%	The units are historic and do not provide space to a modern specification, but attractive to creative activity.	Reasonable	Likely	The buildings are listed, and therefore no scope for major redevelopment. Buildings allocated and likely to stay in employment use.	Yes, poor access, neighbouring residential/hotel/leisure uses, the need to revamp the premises, historic building and flood risk.	Available in the Plan period	Safeguard
F17	Former Frank and Whitome Site (Site B)	J6 M2 2.7kms (via B2040/41 and Canterbury Road).	Reasonable	The route to the M2 through the historic town centre (South Lane, Canterbury Rd and A251) is not suitable for large vehicles.	Poor	No	18	Good	No	Nil	Units are historic and not of modern specification, but attractive to creative activity, and are currently in occupation.	Reasonable	Likely	The buildings are listed, and therefore no scope for major redevelopment. Buildings allocated and likely to stay in employment use.	Yes, poor access, neighbouring residential/hotel/leisure uses, the need to revamp the premises, historic building and flood risk.	Available in the Plan period	Safeguard
F18	Brett Aggregates office site	J6 M2 4kms (via Western Link, London Road and A251).	Reasonable	Good access to Western Link from Bysing Wood Road.	Good	No	12	Reasonable	None	Nil	There is limited out of town offices in Faversham so there is minimal competing supply. Units have modern specification and will be re-occupied if current occupiers vacate.	Good	Yes	No	Major - The site is within a 'local designated site of biodiversity' and an 'area of high landscape value'.	Not in the Plan period	Safeguard

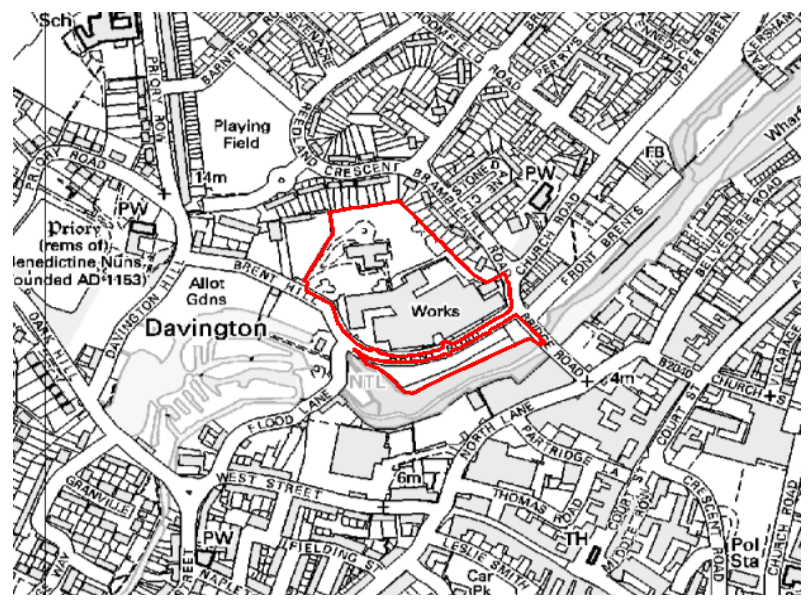

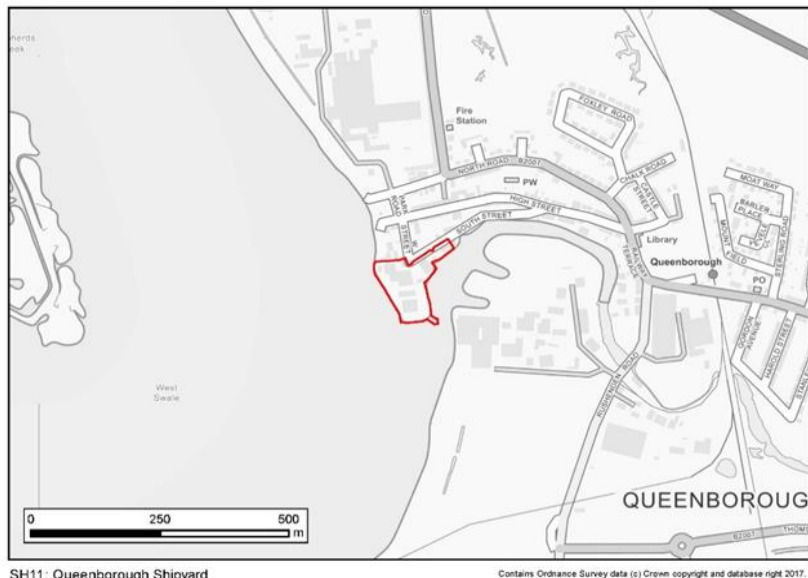
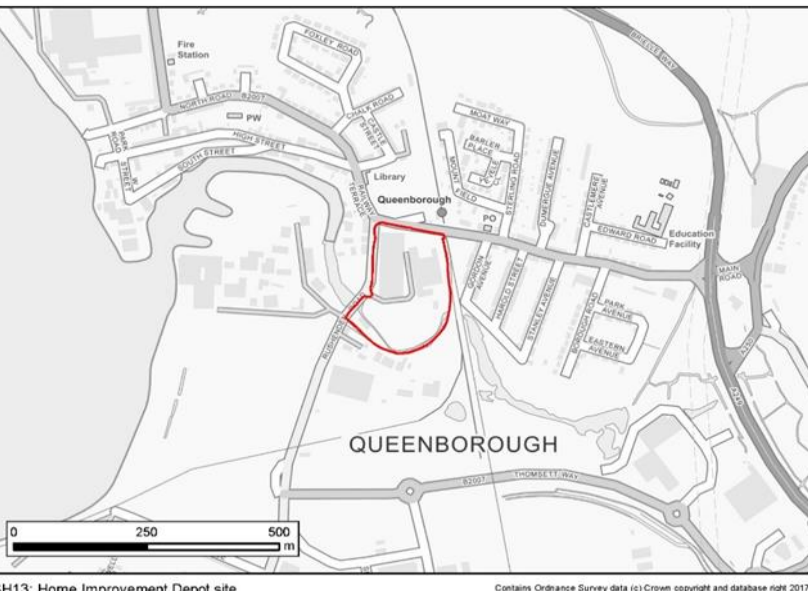
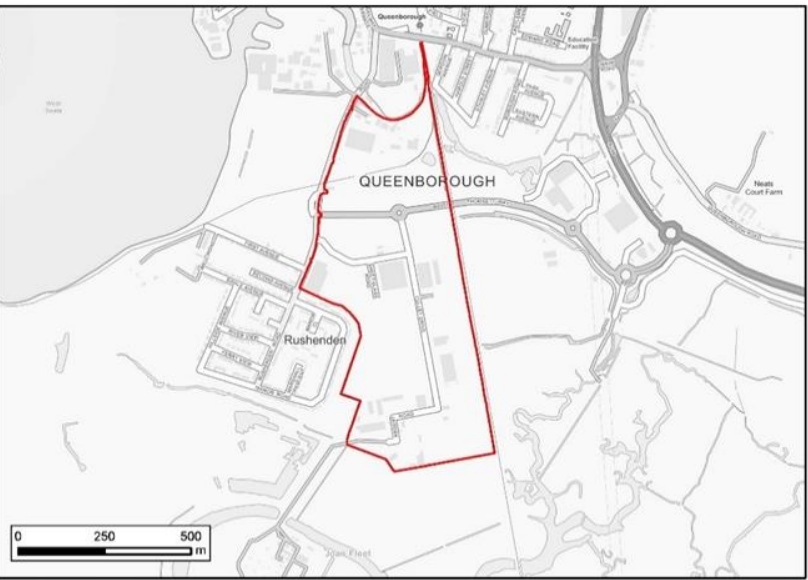
EXISTING EMPLOYMENT AREAS

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
BASIC INFORMATION			Market area	CP1 site? Existing Strategic Emplt locations	Site description	Site area (ha)	Primary type of employ-ment	Site's sequential location	Current relevant planning	CONSTRAINTS	Bad neighbour impact	ATTRACTIVENESS TO OCCUPIERS		Access to amenities (nearest centre km)	Score	Internal environment	
Site ID.	Site name	Site location map										Prominence of site	Compatibility with surrounding uses			Layout, parking, servicing, landscaping etc.	Score
F19	John Hall Close Industrial Estate		Faversham	No	Small established industrial estate to the north of Oare Road. Occupied by haulage, distribution and more local activity such as car repairs.	1.9	Mixed B uses	Within the built up area	None	Most of the site is in EA FZ3.	None	Middling - on the edge of town, but opposite the town's main distributors.	Good - distribution to the south and gravel extraction to the north	Foodstore (J Sainsbury) 1.0km, and town centre 1.7kms.	Reasonable	Wide roadway with dedicated parking & servicing outside each unit. Landscaping at entrance, but not in the site.	Reasonable
F21 (and CFS31)	Macknade Fine Foods		Faversham	No	Collection of former agricultural buildings backing on to open countryside now used for retail/leisure purposes - country foodstores and restaurant, to the south of the A2 and the town centre. 50% Brownfield, 50% Greenfield.	2.8	Other	Adjacent to the built up area	Applications in past ten years for refurbishment and expansion of the existing uses, within the site boundary. A Call for Sites submission seeking allocation for a mixed residential (70%), employment (20%) and retail site (10%). The promoter states that the existing Macknade Fine Foods and employment elements on the site are proposed to be retained within the 30% employment/retail elements, thus, no net additional employment floorspace is proposed.	No landscape designations specifically on the area. But the area is outside of the built-up area boundary and backs onto open countryside and is not far from the Kent Level AHLV, and therefore Local Plan (pol ST3) applies where the primary objective is protection from isolated and/or large scale development. Policy D24 (conserving & enhancing valued landscapes) also applies. A 'rural lane' designation touches the south-eastern border of the site.	None	Low - location is on a country lane.	Good compatibility to restaurant /leisure on west side of Selling Road, but low compatibility with open countryside to the south.	Town centre 2.0kms.	Poor	Possible limitations placed by layout of existing buildings.	Reasonable
F6/9	Faversham Brewer		Faversham	Yes	Historic Shepherd Neame Brewery site centred on North Lane and backing on to the Creek, but taking in three land parcels (the main brewing site, with bottling plant on the Creekside and a block of production and other buildings south of Partridge Lane.	2.2	General Industrial (B2)	In a town centre	None	Historic buildings, flood risk (FZ3 applies) and the nearby residential are the key constraints.	Minor	The site is a prominent town centre location.	Lots of neighbouring town centre uses, but also a lot of residential that generates conflict with industrial processes.	Good - within town centre.	Good	A constrained site, with a high density of building to site area due to historic reasons. Servicing via Partridge Lane is tight, but maintained on site.	Reasonable
F63	Standard Quay		Faversham	No	A collection of small scale historic boat yard buildings and older industrial buildings on Faversham Creek occupied by a mix of industrial uses (incl engineering works), boat and auto repair/servicing with crafts, leisure and retail mixed in.	1.2	Mixed B uses	Within the built up area	None	Flood risk (FZ3).	Minor	A Creekside location, remote from busy routes and high profile locations..	The activities are more light industrial, providing services / products for consumers rather than any industrial process activity, and hence uses are generally compatible with neighbouring residential.	Town centre 0.6kms.	Reasonable	The retention of historic boatyard buildings means Standard Quay is an attractive location, albeit parking and servicing is tight.	Reasonable
F63(i)	Brent's Industrial Estate		Faversham	No	A collection of historic boat yard buildings and older industrial buildings on Faversham Creek that are occupied by a mix of industrial uses (incl engineering works), boat and auto repair/servicing, other local services such as trade counter with leisure and retail mixed in.	2.7	Mixed B uses	Within the built up area	None	Flood risk (FZ3), neighbouring residential and poor access.	Minor	A Creekside location, remote from busy routes and high profile locations..	The activities are more light industrial, providing services / products for consumers rather than any industrial process activity, and hence uses are generally compatible with neighbouring residential.	Town centre 0.6kms.	Reasonable	Brents contains long established small scale industrial sheds. Parking and servicing are tight with little off street dedicated parking.	Reasonable

EXISTING EMPLOYMENT AREAS

1	2	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34
BASIC INFORMATION		Strategic accessibility (road)		Local access by road	Public transport access								REVIEW / RECOMMENDATION				
Site ID.	Site name	Proximity to Mway/ principal roads [kms]	Score	Site junction and quality of access to the principal road network	Score	Is the site close to a railway station (within 400m)?	Station name, number of bus stops within a 400 m radius	Score	Vacancy	Vacancy Score	Other market intelligence e.g. market history, competing supply nearby, occupiers known to be moving in/out,	Score	If the site retains its current use, will it be occupied?	Are there opportunities for redevelopment / intensification / extension?	Are there any constraints on redevelopment / intensification / extension?	When are these constraint(s) likely to be resolved?	Recommend-ation
F19	John Hall Close Industrial Estate	J6 M2 4.8kms (via Western Link, London Road & A251).	Good	The Western Link, London Rd and A251 provide an excellent link avoiding the town centre to the M2. Change excellent to good and add - however pinch point at Ospringe and air quality issues and then change rating to Good.	Good	No	9	Reasonable	Very little	Low	Units are dated, but well occupied. Agents report that units re-let when occupiers vacate. This should continue to be the case over the plan period.	Good	Yes	Yes, 0.5 ha of land immediately to the west. But this area is severely constrained by floodrisk.	Yes, floodrisk. The site is wholly in FZ3 and contains a small pumping station.	Available in the Plan period	Safeguard
F21 (and CFS31)	Macknade Fine Foods	J6 M2 2.0kms (via Canterbury Road & A251).	Excellent	Access road to A2 would need upgrading if large vehicles were to use the area.	Poor	no	12	Reasonable	None	Nil	No market interest for employment activity beyond the existing food related craft activity at this location (ie no interest in general market employment activity).	Don't Know	Yes	This is not a location where there is a clear case for expansion to employment uses beyond the existing food related craft activities, and the promoter is not proposing more employment uses.	Given the location is on the edge of open countryside, reuse of existing buildings is the realistic limitation.	Not in the Plan period	Safeguard
F6/9	Faversham Brewer	J6 M2 2.5kms (via B2040/41 and Canterbury Road).	Reasonable	The site's town central location makes access unsuitable for large vehicles.	Poor	No	30	Good	N/A	Nil	The brewery building is very bespoke. If the brewery vacates it would have to be redeveloped if it is to be retained in employment use. But general site access via the B2040 is not ideal for HGVs with better sites available.	Reasonable	Yes	The access limitations constrain the opportunities for expansion of the Brewery. Were the Brewery to consider changes in the future, any plans would be likely to favour a mix of uses, and would need to consider the wider regeneration plans in the historic core.	Historic environment, flood risk and neighbouring residential.	Not in the Plan period	Safeguard
F63	Standard Quay	J6 M2 3kms (via B2040/41 and Canterbury Road).	Good	Abbey Street is not suitable for large vehicles, and the route to the Mway requires passing through the town centre. Only suited to smaller vans and cars.	Poor	No	1	Poor	None	Nil	The boatyard facilities to the south of the Creek will have limited scope for other uses if occupiers leave.	Reasonable	Yes	No. The historic buildings and access arrangements mean there is no prospect of expansion or intensification.	Yes, the historic buildings, poor quality access and flood risk.	Not in the Plan period	Safeguard
F63(i)	Brent's Industrial Estate	J6 M2 3kms (via B2040/41 and Canterbury Road).	Good	Upper Brents is not suited to large vehicles, and the route to the Mway requires passing through the town centre. Only suited to smaller vans and car borne traffic.	Poor	No	3	Poor	None	Nil	The Brents industrial estate is well occupied, but units are generally dated and in some cases may be coming to the end of their economic life.	Reasonable	Yes	No. The historic buildings and access arrangements mean there is no prospect of expansion or intensification.	Yes, the historic buildings, poor quality access and flood risk.	Not in the Plan period	Safeguard

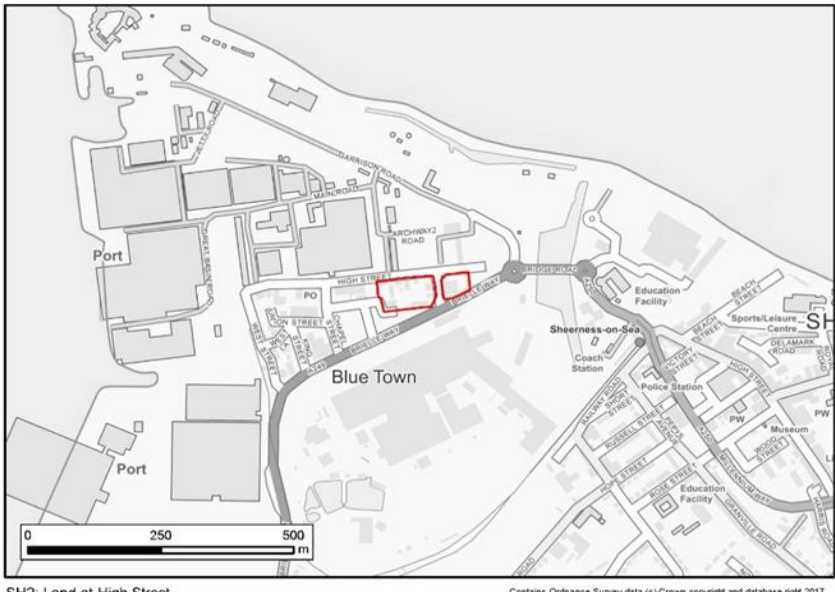
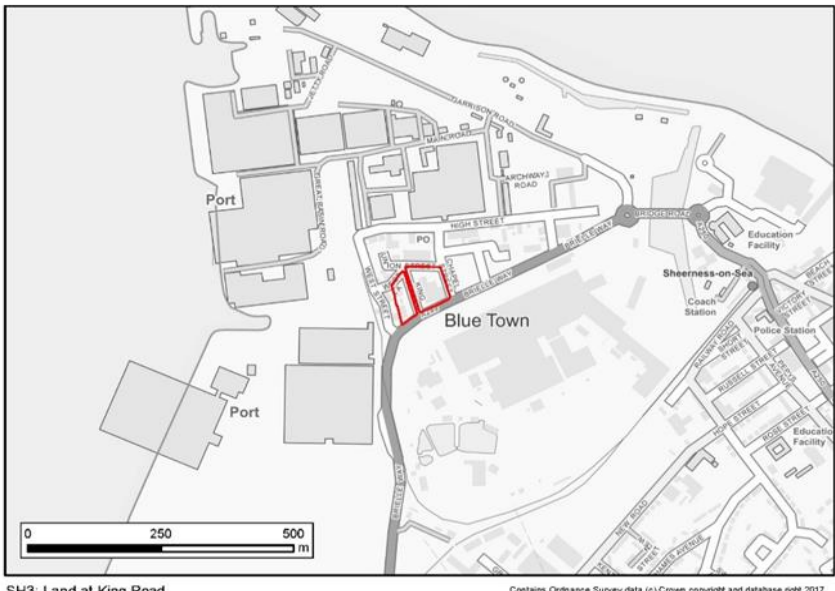

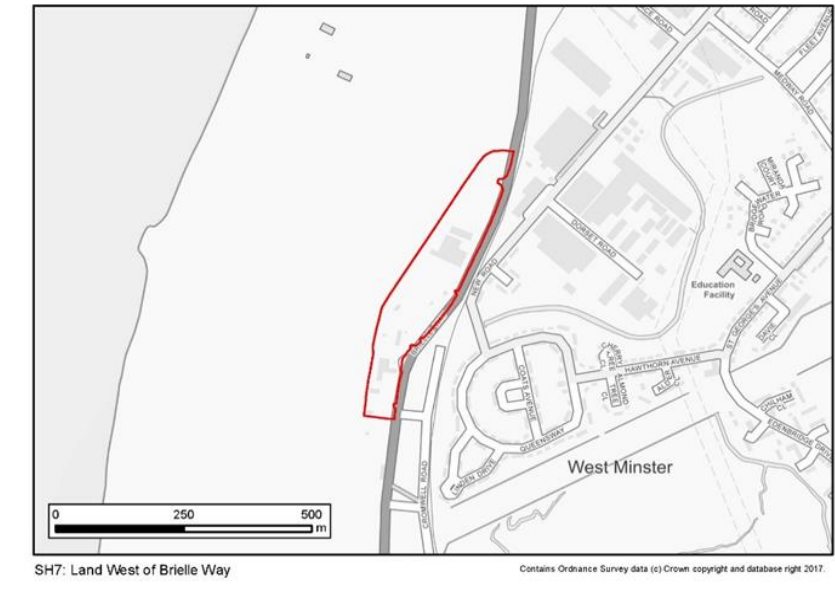
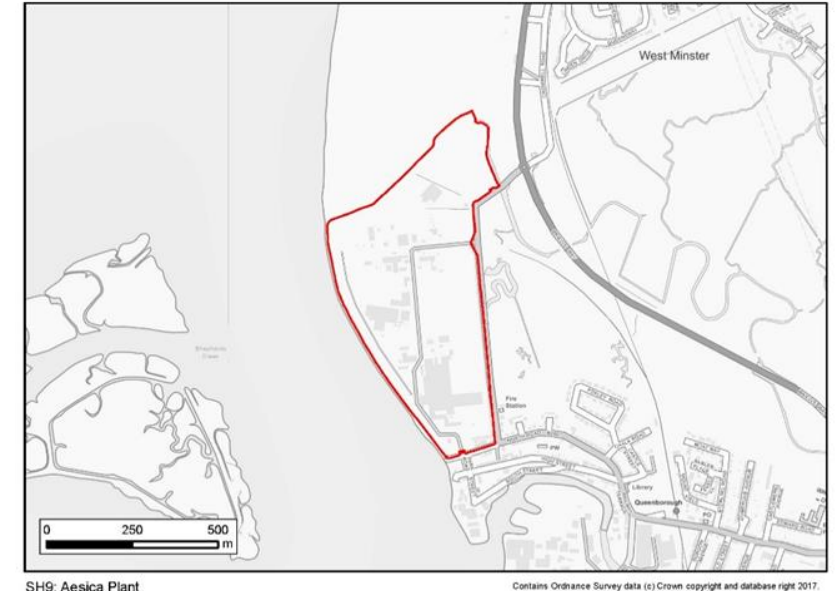
EXISTING EMPLOYMENT AREAS

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
BASIC INFORMATION		Site location map	Market area	CP1 site? Existing Strategic Emplt locations	Site description	Site area (ha)	Primary type of employ-ment	Site's sequential location	Current relevant planning	CONSTRAINTS	Bad neighbour impact	ATTRACTIVENESS TO OCCUPIERS		Access to amenities (nearest centre km)	Score	Internal environment	
Site ID.	Site name											Prominence of site	Compatibility with surrounding uses			Layout, parking, servicing, landscaping etc.	Score
F7/8 (and SBC17/09 1)	BMM Weston		Faversham	No	Located just to the north west of the town centre. Site in single use - BMM Weston, a life sciences company that has designed and manufactured from the Brent Road premises for many years. The site comprises of three separate parts - the car park on the Creek side of the Brent Road (previously a coal yard), the factory buildings with vehicle access via Brent Road, and the converted Victorian house to offices with access from Brent Hill. Site area excludes Ordnance Wharf.	3.1	General Industrial (B2)	Within 400m of town centre	Site is within a 'built up area boundary' (ST3) and allocated for mixed use in the Faversham Creek Neighbourhood Plan (including employment on the existing factory site and housing to the south and on the converted Victorian house site). No relevant planning permissions or applications.	Flood risk (FZ3 applies) to the Creek side area, access on Brent Road and the nearby residential are the key constraints.	Minor	Low - this site is away from industrial areas, and not on a route to a principle highway.	Residential 'arcs' around the northern side of the site, whilst the current industrial activity is on the whole clean, compatibility with residential would be a major issue for any future employment redevelopment.	Town centre 0.4kms.	Good	Building density is comparatively low, with parking provided on the south side of Brent Road where floodrisk is a factor and landscaped grounds surrounding the office. Servicing is undertaken through a central service bay. Landscaping is minimal.	Reasonable
SH1/4	Port of Sheerness		Sheerness	Yes	Peel Ports - with the docks and open storage in the northern and western side of Brielle Way (the A249). Within this northern area is Blue Town, an historic area with some of the oldest Port buildings and infrastructure. East of Brielle Way is the site of the former Wellmarsh steel mill, which is a site cleared for port related uses.	146 ha	Mixed B uses	Within 400m of town centre	Loss of B2 (54,000 sq m) and gain of 30,000 sq m of Sui Generis (port related uses including port automotive open storage and multi-user open storage) on the entirety of the site to the south of the A249.	Scheduled monument (Sheerness Defences) within the northern Royal Naval Dockyard and Blue town conservation areas. To the south bounded by a National Site designated solely for biodiversity & geological value, a SSSI and special protection area, with Coastal Change management area to the west. Several listed buildings are located in the northern section of the site along Garrison Road and Blue Town. On the eastern land parcel is one listed building and part of the Sheerness Defence scheduled monument.	Minor	High - large scale historic dockyard site.	Neighbouring Blue Town has developed and evolved to serve the naval then dockyard functions. No incompatibility issues.	Immediate in Blue Town, at nearby superstore & town centre 0.5 kms.	Good	It is understood that the Port provides a mix of historic and more modern buildings developed to support a long history of varying port activity, but these are less than ideal for modern office or industrial needs.	Reasonable
SH11	Queenborough Shipyard		Sheerness	No	A small wharfside site used by a single operator (Marine & Industrial transmissions) for marine engineering.	1.2	General Industrial (B2)	Within the built up area	The area is allocated in Pol Regen 2 for mixed use as part of the wider Queenborough and Rushenden Masterplan area, which would include continued use for marine related activity.	The site is located within the Queenborough Conservation Area (with a listed building directly to the north of the site), within flood zone 3 and an international and national designated site of biodiversity and/or geological value (the SPA), and the coastal change management area abuts the western boundary of the site. Access to this wharfside location is very tight through residential streets.	Minor	Low - from the landside as screened by the residential.	Specialist marine uses are generally compatible with neighbouring residential.	Queenborough 0.8kms.	Reasonable	Buildings central to the site, and plenty of parking /servicing space on the wharfside.	Good
SH13	Olympic Glass		Sheerness	No	Corporate office and manufacturing site (occupied by Olympic Glass).	3.5	General Industrial (B2)	Within the built up area	The area is adjoining but outside Pol Regen 2.	Site part in FZ2 3. Backs on to railway line, industrial to the south and haulage and other open storage to the west.	None	Middling - highly visible site in Queenborough.	Good - industrial to the south and haulage and other open storage to the west.	Queenborough 0.2kms.	Good	Site split between two large buildings set back in the site with some landscaping/screening. Separate office and manufacturing servicing access arrangements. Southern part of the site is open / parking area due to flood risk issues.	Reasonable
SH14	Rushenden Industrial Estate		Sheerness	No	Predominantly an area of open storage for the pre-delivery inspection of cars, but also storage if building materials and haulage. In the southern-most part there are a number of smaller industrial units that are fully occupied. North of the new link road, Thomsett Way, is the site of the former steel rolling mill that is largely cleared and runs to 5.7 ha (source: EIA screening). At the very northern extent are some older poor quality industrial buildings and areas of open storage for car parts salvage. The area immediately to the east across the railway line that is used exclusively for open storage for PDI of cars.	37.8	Storage and Distribution (B8)	Within the built up area	The Istit steel mill closed in 2013. 2018 EIA screening application to create a development platform (addressing floodrisk issues) approved. The site is allocated in Pol Regen 2 for future low rise residential use as part of the wider Queenborough and Rushenden Masterplan area.	Floodrisk (FZs 2 and 3).	None	Middling - not on A249, but on fast new link road.	Generally surroundings are compatible - other industrial and leisure, but residential to the southwest.	Superstore and leisure activity 600m and Queenborough 1kms.	Reasonable	South of Thomsett Way the activity takes place east and west of Cullet Drive and all parking and servicing is managed on-site. Because the area is mostly open storage the area is characterised by palisade fencing, which produces a poor quality environment. North of Thomsett Way the long established area presents a poor environment with on street parking and little in the way of landscaping.	Poor

EXISTING EMPLOYMENT AREAS

1	2	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34
BASIC INFORMATION		Strategic accessibility (road)		Local access by road	Score	Public transport access		Score	Vacancy	Vacancy Score	Other market intelligence e.g. market history, competing supply nearby, occupiers known to be moving in/out,	Score	REVIEW / RECOMMENDATION		Are there any constraints on redevelopment / intensification / extension?	When are these constraint(s) likely to be resolved?	Recommendation
Site ID.	Site name	Proximity to Mway/ principal roads [kms]	Score	Site junction and quality of access to the principal road network		Is the site close to a railway station (within 400m)?	Station name, number of bus stops within a 400 m radius						If the site retains its current use, will it be occupied?	Are there opportunities for redevelopment / intensification / extension?			
F7/8 (and SBC17/09 1)	BMM Weston	J6 M2 2.7kms (via B2040/41 and Canterbury Road).	Good	Access to/from Brent Road is tight for large vehicles and is via Creek Bridge and access to the principle road is via the B2040/41 which is through the middle of Faversham. This route is unsuitable for large vehicles.	Poor	No	33	Good	N/A	Nil	Single occupier has been in situ for a number of years. Buildings are a mix of ages, but appear well maintained. Site access is poor and will detract from the attraction to potential new occupier(s). If the current occupier vacates, it is unlikely that a single new occupier would be found.	Poor	Yes	The site's poor accessibility and location in a predominantly residential area indicate that were the long term occupier to move, the site would not remain wholly in employment use. A mixed use scheme with employment not requiring large vehicle access would be suitable in this location close to the town centre.	Yes, flood risk, access and neighbouring residential.	Not in the Plan period	Allow managed release
SH1/4	Port of Sheerness	J5 M2 17kms (via A249).	Reasonable	Access on to Breille Way (A249) is good, albeit single carriageway through the town, but A249 is duelled outside the town boundary.	Good	Yes	9	Good	Operating at approximately 98% occupancy	Low	The port is currently operating at 98% occupancy, with the focus on B8 storage uses with some manufacturing activity. The key growth sector for Peel Ports in recent years has been the automotive sector. The operator forecasts significant job growth in the coming years, if it can expand its operational land either at Rushenden Marshes to the south, or on reclaimed land to the north. The port Authority have recently constructed a bridge over the A249 connecting its facilities, and redeveloped the former Wellmarsh steel mill site that has mainly provided for B8 port related uses.	Good	Yes	There are large cleared sites in the area south of the A249, but these are needed for port related activities for which there is expanding demand. The Port has a number of live planning permissions. However, the Port uses are specialist and not part of 'general' industrial provision.	No	N/A	Safeguard
SH11	Queenborough Shipyard	J5 M2 15kms (via Main Road Queenborough A2007 and the A249)	Reasonable	Poor - link roads are narrow and residential.	Poor	No	6	Reasonable	None	Nil	Units are in reasonable condition and seem well occupied. Occupiers from the marine sector will find this location attractive.	Reasonable	Hard to tell	Not for intensified employment use. The future for this site is likely to be mixed use, should there remain a need for the marine related activities in this location.	Sensitivity of wharfside location in particular heritage and habitat designations. Floodrisk.	N/A	Allow managed release
SH13	Olympic Glass	J5 M2 15kms (via Rushenden Road, Thomsett Road and the A249)	Reasonable	Good - Rushenden Road and Thomsett Road provide a link to the A249 without passing through residential or town centre areas.	Good	Yes	Station is Queenborough. Bus stops: 33	Excellent	None	Nil	Currently in single occupation (Olympic Glass), but has recently undergone refurbishment with the intention of seeking becoming a multi-let building.	Reasonable	Yes	No opportunity for major floorspace expansion as site is already high density. However, building under-going refurbishment with the intention of conversion to a multi-let building.	Floodrisk on the southern parcel.	Not in the Plan period	Safeguard
SH14	Rushenden Industrial Estate	J5 M2 14kms (via Thomsett Road).	Reasonable	Good - Thomsett Way provides direct access within 1km to the A249. The new link road has brought considerable improvement in access to the industrial estate.	Excellent	No	15	Reasonable	Possibly some vacancy	Low	The majority of the site is used for car storage/inspection, which is a land intensive use. Proximity to the port is a key requirement for the large car manufacturers importing to the UK - parts of the site could be redeveloped during the plan period.	Reasonable	Yes	The bulk of the area is established employment uses, and should be retained. The area north of Thomsett Way, the 5.7 ha former steel mill site is part of a wider regeneration area (Pol Regen2) that will focus on delivering residential use on this and the other former employment sites adjacent to Queenborough Creek.	Flood risk and contamination associated with the past industrial use.	N/A	Safeguard

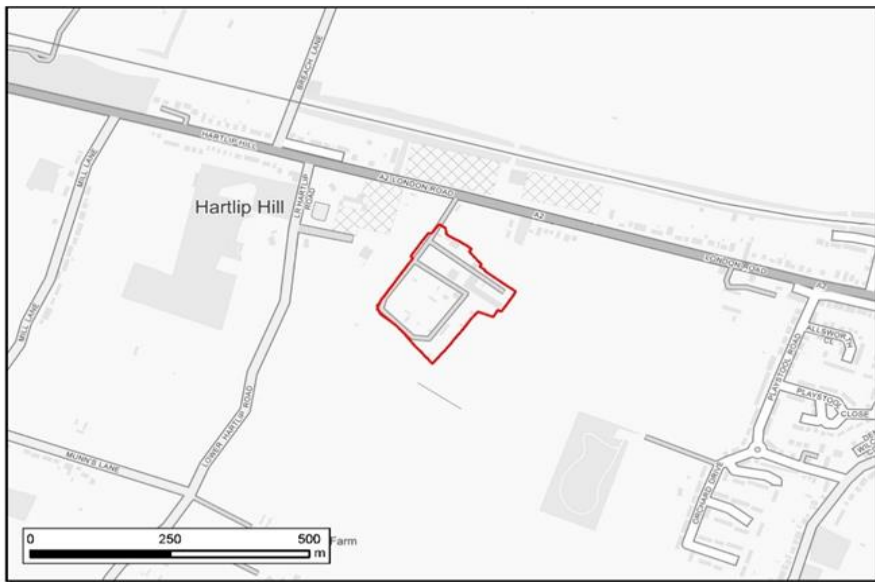
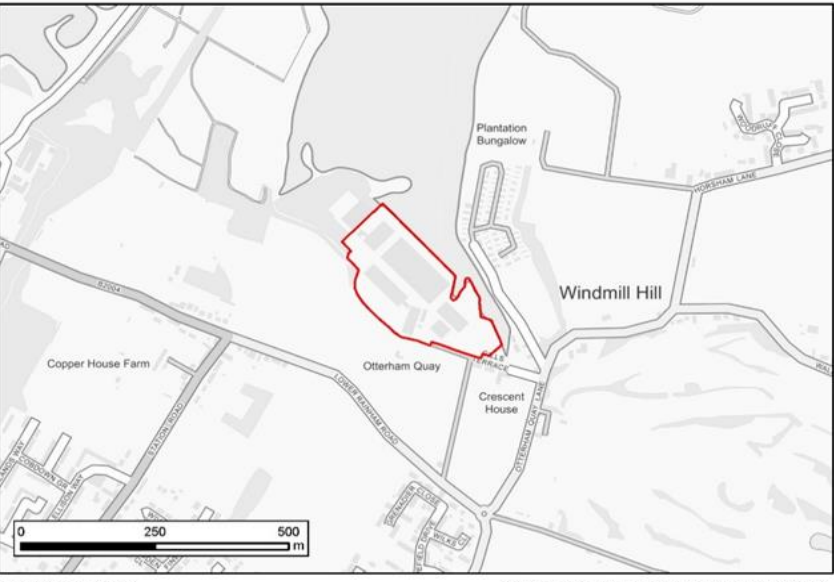
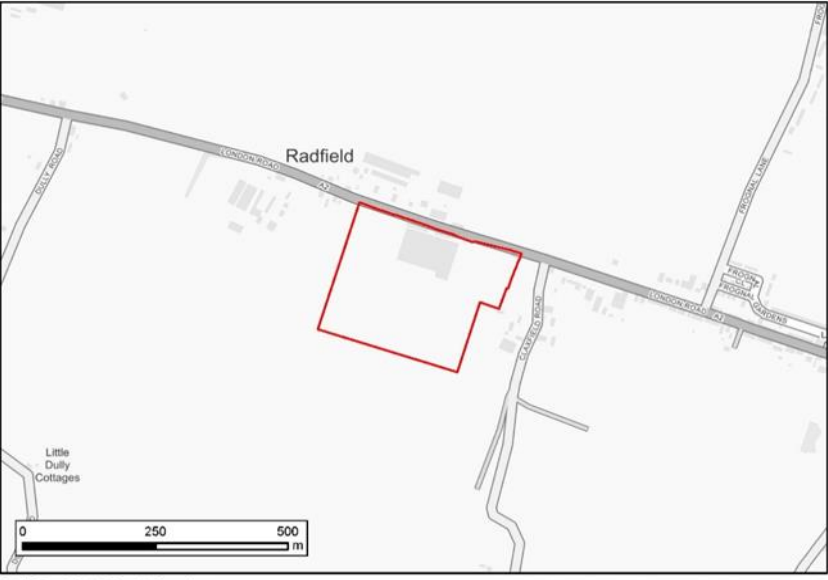


EXISTING EMPLOYMENT AREAS

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
BASIC INFORMATION			Market area	CP1 site? Existing Strategic Emplt locations	Site description	Site area (ha)	Primary type of employ-ment	Site's sequential location	Current relevant planning	CONSTRAINTS	Bad neighbour impact	ATTRACTIVENESS TO OCCUPIERS		Access to amenities (nearest centre km)	Score	Internal environment	
Site ID.	Site name	Site location map										Prominence of site	Compatibility with surrounding uses			Layout, parking, servicing, landscaping etc.	Score
SH2	Duke of Clarence Estate (Land at High Street)		Sheerness	No	A small trading estate in Blue Town with older small unit stock mostly occupied by businesses catering for the local consumer services market.	0.8	Light Industrial (B1c)	Within 400m of town centre	None	Adjoining the Sheerness: Royal Naval Dockyard and Blue town Conservation area. Some residential nearby.	Minor	Good - immediately on the A249 and close to Port entrance.	Good - providing local services from small units buffered by the busy A249.	Immediate in Blue Town, at nearby superstore and town centre 0.5 kms.	Good	The larger parcel has a courtyard for parking and servicing, and both are adequately served. Little landscaping, but buildings immediately on the A249 and in an urban setting .	Reasonable
SH3	Land at King Road		Sheerness	No	Older industrial and warehousing stock with areas of outdoor storage for engineering/building materials.	0.8	Storage and Distribution (B8)	Within 400m of a town centre	None	Adjoining the Sheerness: Royal Naval Dockyard and Blue town Conservation area. Some residential nearby.	Minor	Good - immediately on the A249 and close to Port entrance.	Good - providing local services from small units buffered by the busy A249.	Immediate in Blue Town, at nearby superstore and town centre 0.5 kms.	Good	Parcels either side of King Street provide a poor setting with on-street parking on a narrow road, and poor quality buildings lacking any landscaping.	Poor
SH5	New Road Industrial Estate		Sheerness	No	Long established industrial estate with a mix of unit sizes, including small units in the Regis Business Park. Bounded by the railway line and The Fleet water course, and bisected by New Road.	21.1	Mixed B uses	Within the built up area	None	Access restricted through the town centre and the residential area leading to the A249. Site crossed by electricity cables/pylons, but otherwise unconstrained.	Minor	Low - site has a low profile because it is on the other side of the tracks from the A249, and New Road is a minor road linking to a small residential area.	Middling given proximity to other industrial to the north, but residential to the south.	Town centre 1.3kms.	Reasonable	Low density development with buildings set back from the street and plenty of on-site parking and servicing space. Little landscaping, and site crossed by electricity pylons.	Reasonable
SH7	Land West of Brielle Way		Sheerness	Yes	An industrial area largely linked to vehicle import/export.	4.9	Mixed B uses	Within the built up area	None	Flood risk Zone 3, but with significant flood defences in the area.	None	Units have good visibility on the A249.	High -wedged between the Port open storage area and the A249/railway.	Town centre 2.3kms.	Poor	Narrow site leaves little room for significant landscaping. Location on A249 means all parking and servicing are on-site.	Reasonable
SH9	Recipharm (formerly Aesica) Plant		Sheerness	No	A pharmaceuticals manufacturing & development site.	29.9	General Industrial (B2)	Adjacent to the built up area	Permission for extension on the southern part of the site - 9,930 sq m B8 and B2. Part implemented. The Local Plan identifies Land at Whiteway Road, Queenborough as potential future expansion land, but highlights key landscape and environmental issues that would need to be overcome before development could come forward.	This site is within FZ3. Immediately to the north is a Site of Special Scientific Interest (Medway Estuary and Marshes) and to the south is the Queenborough Conservation Area (including several listed buildings). To the east is a locally designated site of biodiversity, an important local countryside gap, a coastal change management area, and an area of high landscape value (Swale Level).	None	Middling - clearly visible from Queenborough.	Good - the manufacturing activity is bounded by the open storage and other industrial uses to the north and the company office buildings to the south form a buffer between the heavy industrial activity and the residential in Queenborough to the south.	Queenborough 0.5 kms.	Good	The manufacturing plant and office have separate access arrangements, both linking with Whiteway Road, and the office accessing off the High Street. The latter is narrow and constrained, but is sufficient for the office based car journeys. The site is landscaped and some screening of the manufacturing plant.	Good

EXISTING EMPLOYMENT AREAS

1	2	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34
BASIC INFORMATION		Strategic accessibility (road)		Local access by road		Public transport access							REVIEW / RECOMMENDATION				
Site ID.	Site name	Proximity to Mway/ principal roads [kms]	Score	Site junction and quality of access to the principal road network	Score	Is the site close to a railway station (within 400m)?	Station name, number of bus stops within a 400 m radius	Score	Vacancy	Vacancy Score	Other market intelligence e.g. market history, competing supply nearby, occupiers known to be moving in/out,	Score	If the site retains its current use, will it be occupied?	Are there opportunities for redevelopment / intensification / extension?	Are there any constraints on redevelopment / intensification / extension?	When are these constraint(s) likely to be resolved?	Recommend-ation
SH2	Duke of Clarence Estate (Land at High Street)	J5 M2 17kms (via A249).	Reasonable	Access on to Breille Way (A249) is good and direct via a route between the two parcels. Brielle Way is single carriageway through the town, but A249 is duelled outside the town boundary.	Good	Yes	9	Good	None	Nil	The units are small and are occupied by local businesses. The units are well located to serve the local market and there is limited competition from other areas. But, the units are dated and are coming towards the end of their economic life. Strong enough demand should sites be redeveloped for B2/B8 uses, subject to viability.	Reasonable	Yes	Not beyond replacement on a scale broadly equivalent to what is there now.	The historic setting.	Available in the Plan period	Safeguard
SH3	Land at King Road	J5 M2 17kms (via A249).	Reasonable	Access on to Breille Way (A249) is good via three options, albeit single carriageway through the town, but A249 is duelled outside the town boundary.	Good	No	9	Reasonable	None	Nil	The units are small and are occupied by local businesses. The units are well located to serve the local market and there is limited competition from other areas. But, the units are dated and are coming towards the end of their economic life. Strong enough demand should sites be redeveloped for B2/B8 uses, subject to viability.	Reasonable	Yes	Not beyond replacement on a scale broadly equivalent to what is there now.	The historic setting.	Available in the Plan period	Safeguard
SH5	New Road Industrial Estate	J5 M2 18.5kms (via A249).	Reasonable	To access the A249 via New Road (adequate) and some residential roads to the Bridge Road roundabout.	Poor	No	9	Reasonable	Some vacant units, but overall vacancy is low	Low	The quality of the existing stock varies, but rents are generally affordable. There are some buildings that have been vacant for long periods of time. Units on Dorset Road are generally better quality than the rest of the site. These units will be more attractive to occupiers over the plan period.	Good	Yes	There is an undeveloped site on the northern side of New Road (1.7ha), but is crossed by overhead electricity cables that are likely to have precluded development.	The electricity cables and flood risk (whole area in FZ3.	Not in the Plan period	Safeguard
SH7	Land West of Brielle Way	J5 M2 16.5kms (via A249).	Reasonable	All units are accessed directly on/off the A249, which is single carriageway at this point.	Good	No	21	Good	None	Nil	Units to the north are of reasonable quality, but some are bespoke, having been built to service car importing sector. To the south of the area the units are poorer quality and are coming to the end of their economic life.	Good	Yes	No	Access on to the A249	Available in the Plan period	Safeguard
SH9	Recipharm (formerly Aesica) Plant	J5 M2 16kms (via A249).	Reasonable	Whiteway Road provides a direct link to the A249.	Excellent	No	0	Very Poor	None	Nil	The buildings are in reasonable condition, but the facility is bespoke and it may be difficult to find a new occupier should Aesica leave. But, as the facility is currently being expanded, there is little prospect of this happening in the near future.	Good	Yes	An expansion of the manufacturing activity is currently underway within the site boundary. The Local Plan identifies two parcels at Whiteway Road (totalling 14.1 ha), as potential future expansion land, but highlights key landscape and environmental issues that would need to be overcome before development could come forward.	A number of national and local designations including the SPA and inclusion in FZ3, plus the local wildlife site (the Diggs and Sheppey Court Marshes Local Wildlife Site) and potential impact on the Queenborough Conservation Area.	Unknown	Safeguard

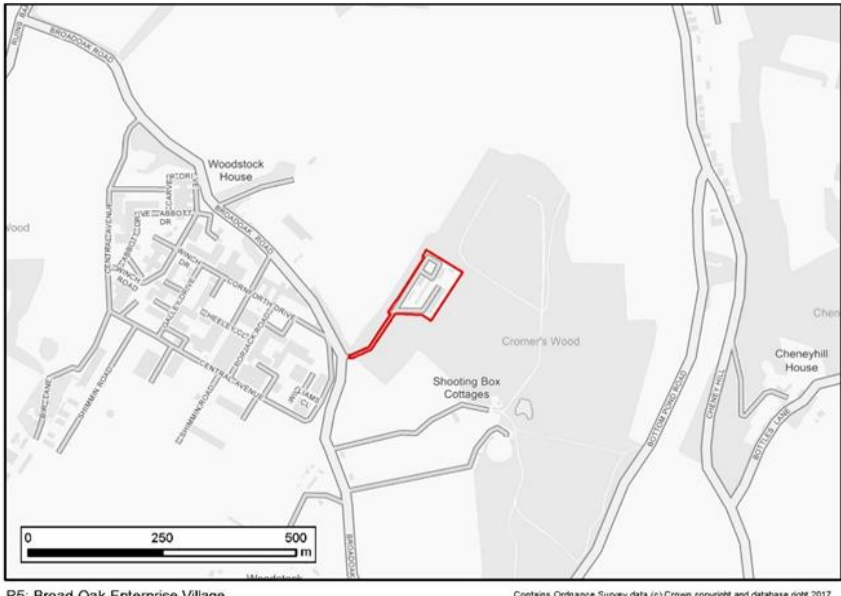

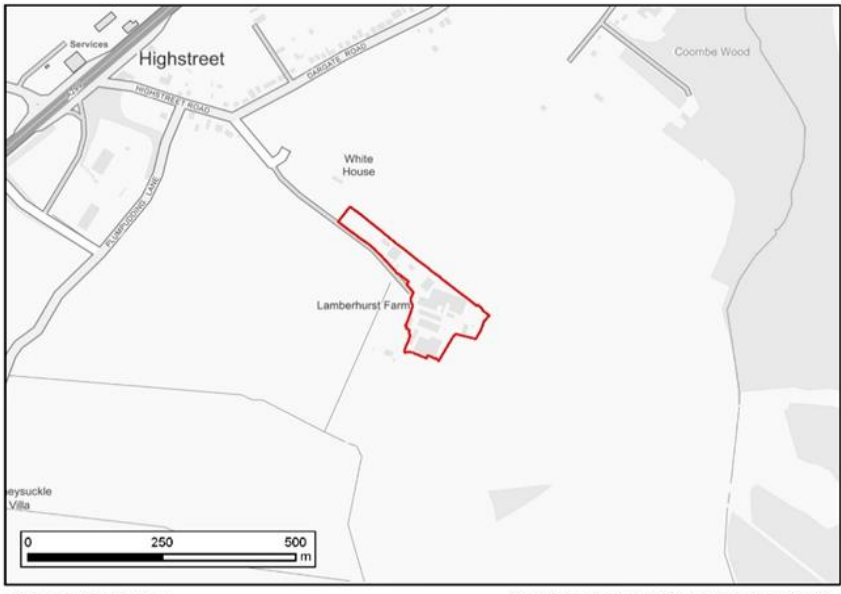
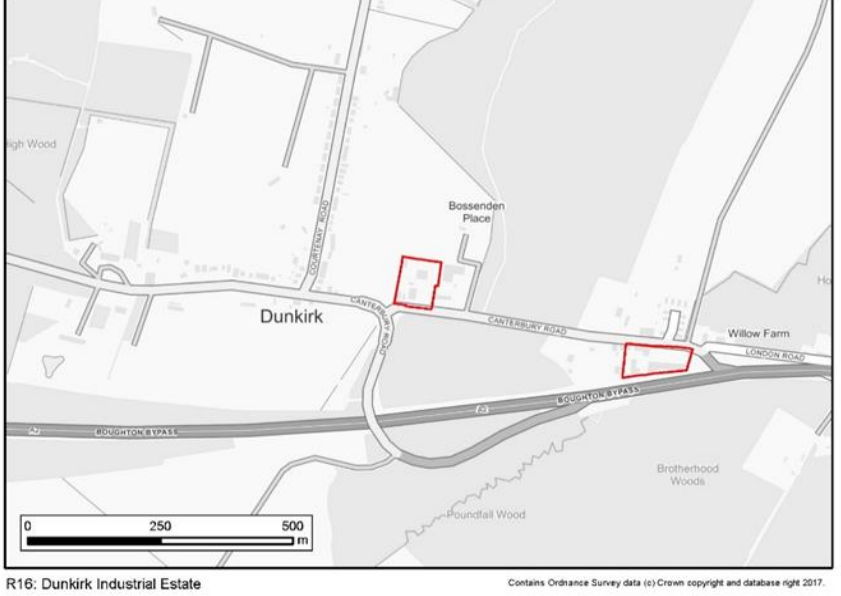
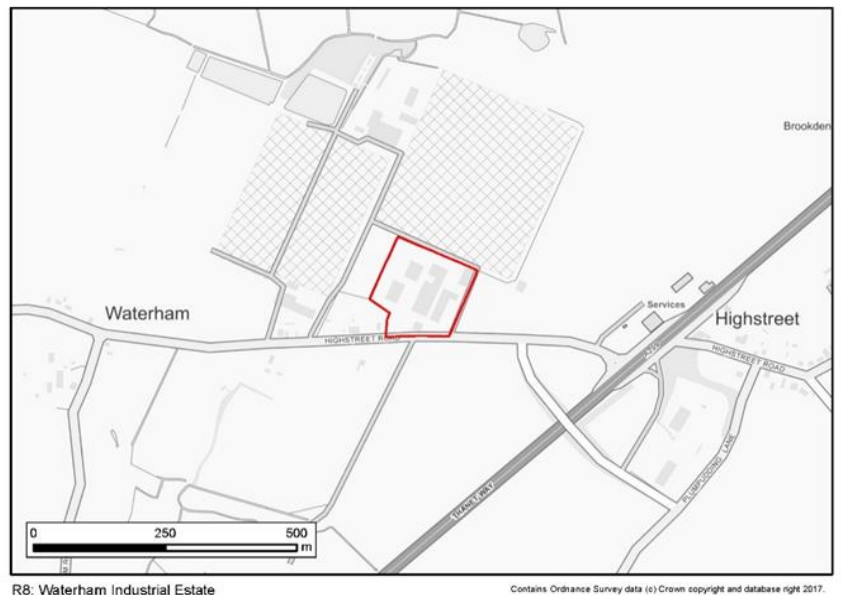
EXISTING EMPLOYMENT AREAS

1 2 BASIC INFORMATION		3	4	5	6	7	8	9	10	11 CONSTRAINTS	12	13 14 ATTRACTIVENESS TO OCCUPIERS <i>External environment</i>		15	16	17 <i>Internal environment</i>	18
Site ID.	Site name	Site location map	Market area	CP1 site? Existing Strategic Emplt locations	Site description	Site area (ha)	Primary type of employ-ment	Site's sequential location	Current relevant planning	Detail any constraint(s) to intensification / expansion	Bad neighbour impact	Prominence of site	Compatibility with surrounding uses	Access to amenities (nearest centre km)	Score	Layout, parking, servicing, landscaping etc.	Score
R10	Newington Industrial Estate		Rural west	No	A small well occupied industrial estate providing mostly open storage for building materials and materials recovery located just south of the A2.	3.3	Storage and Distribution (B8)	Outside the built up area	Reg18 submission (REG3044) seeks B class employment uses greenfield expansion on land immediately south of the existing Estate. The promoter states that development of this land would complement the existing uses and meet pent up local demand. Promoter estimates site could support 8,800 sq m of B1/B2 and B8 on 0.95 ha.	Some residential immediately to the north. Partly within the Kent Minerals safeguarded area. Possible highway issues on to the A2.	Minor	Low - set back from the A2 and reasonably well screened from the A2/neighbouring residential.	No other industrial uses in the immediate locality, and residential in close proximity.	Limited provision in Newington 1.0 kms. Nearest major offer Sittingbourne 6.5 kms.	Reasonable	Mostly open storage, layout appears uncoordinated. Sufficient space for parking and servicing.	Reasonable
R11	Otterham Quay		Rural west	No	A collection of warehouse buildings straddling the Borough boundary, mostly in Medway District. Just two industrial buildings in Swale.	4.4	Storage and Distribution (B8)	Outside the built up area	No recent planning activity. Some office to residential prior approvals locally, but not within the industrial buildings.	The site is wholly within FZ 3 and the Coastal Change Management Area, and adjacent to the SPA (Otterham Creek). Access to this rural creekside location is via narrow rural lanes, and dictates the size of service vehicles that can be used. Opposite a mobile home holiday park. The area within Medway is adjacent to an area of local landscape importance and an identified tidal flood area. Medway do not designate or allocate the industrial units for employment use.	Minor	Low - this is creekside in a rural location.	Low - there is boat yard activity, but also motor repair and the mobile home park on the opposite side of the creek.	Nothing in immediate vicinity. Nearest Rainham 3kms.	Poor	There is plenty of parking space, but servicing arrangements are not clear.	Reasonable
R12	Coolchain Depot, Teynham		Rural west	No	A food storage and distribution warehouse on the A2 near Teynham. The site is operated by Iss Fowler Welch.	7.5	Storage and Distribution (B8)	Outside the built up area	None	Site backs onto open countryside.	None	Middling - on the busy A2, but not at a junction	Middling - there are some other industrial and commercial activity in the vicinity, as well as residential.	Teynham 1kms, Sittingbourne 3.5kms.	Reasonable	The building is set back a little from the road to allow for a soft landscape screen, parking and servicing are extremely well organised.	Excellent
R14	Hengist Field, Borden		Rural west	No	Small scale office in a rural setting.	1.4	Office (B1a)	Outside the built up area	None	Development in the countryside policies. Offices generally compatible with neighbouring residential.	Minor	Low - in the countryside.	Low - no other employment uses nearby.	Sittingbourne 4kms.	Poor	Well laid out site with good soft landscape screening and adequate on-site parking and servicing space.	Excellent
R4 (LPR2404)	Kent Science Park (incl. proposed expansion on to land to the south)		Rural west	Yes	Campus style low density Science Park accommodating 48,000 sq m of R&D (predominantly pharmacy & life sciences) & office to the south of Sittingbourne. Undeveloped areas within the envelope to the north, south and west. Promoter seeking 4.8 ha southern extension.	45.9 (excl 4.8 ha expansion)	B1	Outside the built up area	Recent expansion of GPharm (unit 730). Land (4.8 ha) immediately south promoted for expansion.	Partially in an area of high landscape value. Locally designated site of biodiversity immediately to the east.	None	Low - a remote location.	Low - surrounded by open countryside/farm land.	Some provision on site and at the adjacent Woodstock Club, Sittingbourne 4 kms.	Reasonable	High quality landscaped environment, with ample parking and servicing space.	Excellent

EXISTING EMPLOYMENT AREAS

1	2	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34
BASIC INFORMATION		Strategic accessibility (road)		Local access by road	Public transport access								REVIEW / RECOMMENDATION				
Site ID.	Site name	Proximity to Mway/ principal roads [kms]	Score	Site junction and quality of access to the principal road network	Score	Is the site close to a railway station (within 400m)?	Station name, number of bus stops within a 400 m radius	Score	Vacancy	Vacancy Score	Other market intelligence e.g. market history, competing supply nearby, occupiers known to be moving in/out,	Score	If the site retains its current use, will it be occupied?	Are there opportunities for redevelopment / intensification / extension?	Are there any constraints on redevelopment / intensification / extension?	When are these constraint(s) likely to be resolved?	Recommend-ation
R10	Newington Industrial Estate	M2 J5 in 6.8 kms. Immediate access to A2.	Reasonable	Reasonable junction access on to A2. Need to pass through a number of settlements on A2 on route to A249.	Reasonable	No	6	Reasonable	None	Nil	The space is currently fully let and the site is well suited to construction related industries, and is largely open storage. Possible there is more demand than is currently being met.	Reasonable	Yes	Expansion of the site as proposed to provide more rural employment / support the rural economy appears a realistic proposition, subject to other possible policy constraints.	Policies controlling development in the open countryside.	Available in the Plan period	Safeguard
R11	Otterham Quay	A2 1.9kms & M2 J4 in 8.6 kms (via Rainham).	Poor	Poor - the road access to the Quay is very narrow rural lanes.	Poor	No	12	Reasonable	None	Nil	There are a number of buildings within the estate. There is a single large modern building that is in good condition, and a number of smaller dated units which appear to be coming to the end of their economic life. Should units on the estate become vacant it may be difficult to re-let due to the remote location and relatively poor access. Residential development is proposed on the site, that if implemented would make the remainder of the site far less attractive to potential occupiers.	Poor	Hard to tell	No	Yes, the road access. The poor access arrangements for large vehicles would preclude this site from being used other than for specialist marine related activity.	Not in the Plan period	Allow managed release
R12	Coolchain Depot, Teynham	M2 J5 in 10 kms (via A2 & A249).	Reasonable	Good access arrangements on the A2, but to access M2 requires either passing through Sittingbourne or around Faversham.	Reasonable	No	6	Reasonable	None	Nil	Existing industrial unit is a modern purpose built facility, with the current occupier suited to the rural location. Due to the rural location the unit may struggle to be re-occupied should Fowler Welch vacate . We think despite rural location unit may be reoccupied.	Good	Yes	No	The current policy position (DM24 in particular) limits the scope for development in the countryside.	Available in the Plan period	Safeguard
R14	Hengist Field, Borden	M2 J5 in 3kms (via minor roads through Oad Street & A249).	Excellent	Access is onto a narrow country lane, and the route to the M2 J5 passes through Oad Street village. However, as the traffic is predominantly cars, this is a suitable route.	Reasonable	No	6	Reasonable	Some medium sized units (up to 420 sq m) currently available.	Middling	Modern units of reasonable quality, but they are located to far from local amenities which is a requirement of many office occupiers. It is likely that vacant units will have long voids. The offices will compete with other office parks like Conqueror Court which are closer to town centre amenities and the A249.	Reasonable	Yes	No	Development impact on the countryside policies. The poor quality of the road access.	Not in the Plan period	Safeguard
R4 (LPR2404)	Kent Science Park (incl. proposed expansion on to land to the south)	J5 M2 10kms. A249 J 6kms.	Reasonable	Access to the principal route (A2 or A249) is via narrow rural lanes. Large vehicles are required to travel north into Sittingbourne to access the A2 and A249.	Poor	No	3	Poor	Some of the larger units, specifically units which have specialist laboratory space.	Low	The site has a mix of occupiers from a range of sectors. The park promotes itself for agri-tech, biotech and biopharma sectors. The park's on-site amenities are attractive for occupiers. Notwithstanding the challenges of being outside the 'golden triangle' and lack of University links, the park has been successful in attracting GW Pharmaceuticals for their cannabis medicine centre and they are seeking to expand the facility. Any future development is likely to dependent on specific occupier requirements as the park may struggle to pick up footloose requirements who will favour better located facilities co-located with universities. Expansion (or not) of the Park will always struggle to be justified in a ELR type study because of the specialist nature of activity and demand - including the likely large area of search (and so competing locations for any sector based need). As regards any large scale expansion we remain of the opinion that this is 'high risk / high reward' because without a site being available there is no chance of capturing footloose speculative demand, but at the same time there is considerable uncertainty around how large the relevant science related market may be.	Good	Yes	Opportunities within the Science Park envelope - to the north (approx.12.4 ha part occupied by Sittingbourne Football Club and a fitness centre), to the south (approx. 10.2 ha), and to the west 5.8 ha. 4.8 ha possible expansion site immediately to the south.	A small part of the northern parcel is within an 'area of high landscape value'. The western parcel is wholly within an 'area of high landscape value'. To the east the site is bound by an area of high landscape value and a local designated site of biodiversity. The possible expansion south is close to the Kent Level Area of High Landscape Value.	Not in the Plan period	Safeguard

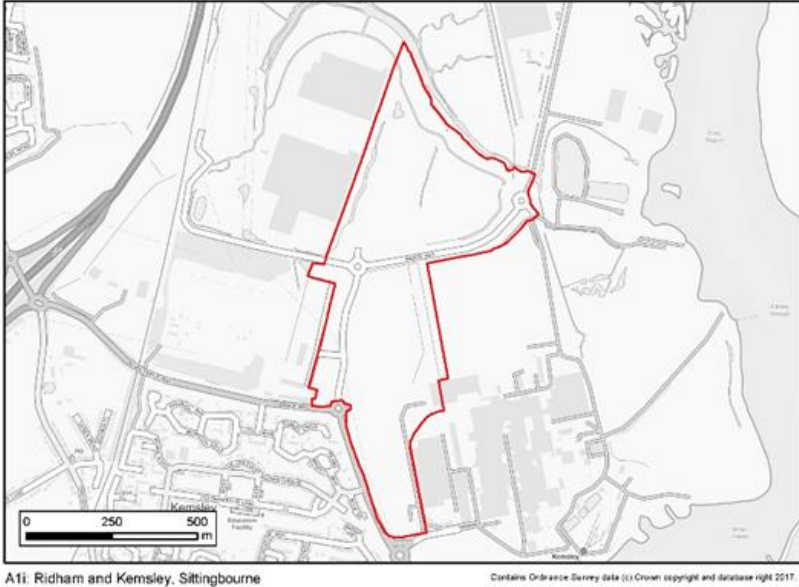

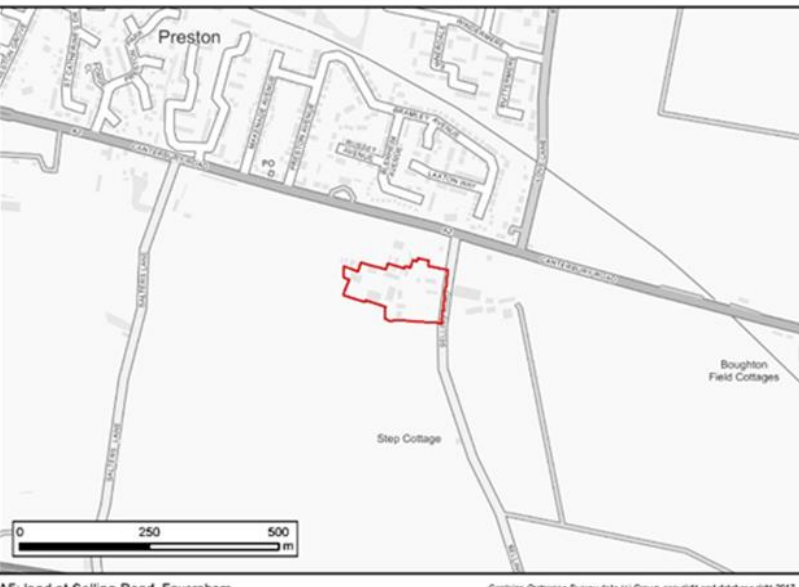

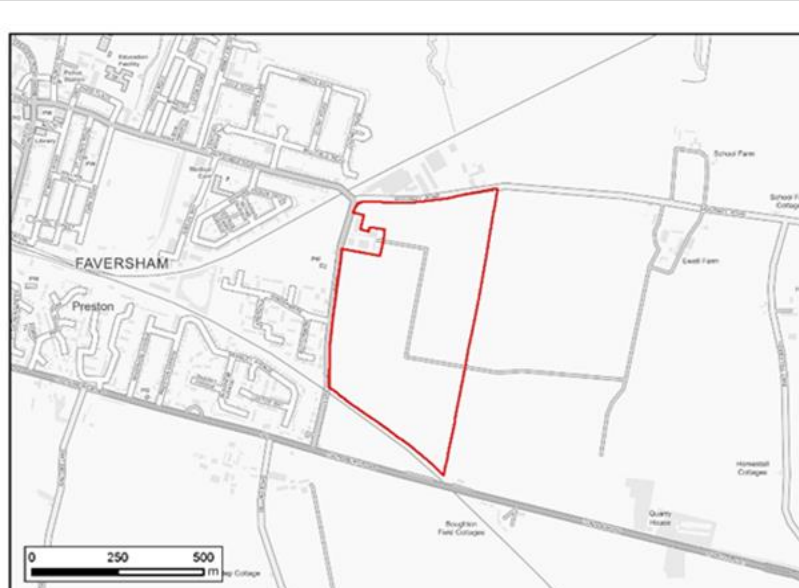

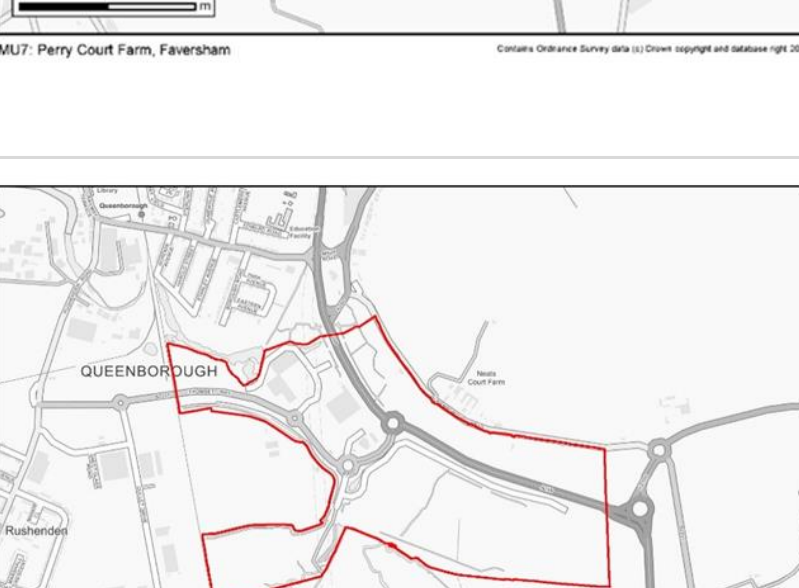
EXISTING EMPLOYMENT AREAS

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
BASIC INFORMATION										CONSTRAINTS		ATTRACTIVENESS TO OCCUPIERS				Internal environment	
Site ID.	Site name	Site location map	Market area	CP1 site? Existing Strategic Emplt locations	Site description	Site area (ha)	Primary type of employ-ment	Site's sequential location	Current relevant planning	Detail any constraint(s) to intensification / expansion	Bad neighbour impact	Prominence of site	Compatibility with surrounding uses	Access to amenities (nearest centre km)	Score	Layout, parking, servicing, landscaping etc.	Score
R5	Broad oak Enterprise Village		Rural west	No	Located close to the KSP the Broad oak Enterprise Village is currently let to a single occupier, BBI.	1.0	B1	Outside the built up area	None	The site is surrounded by an area of high landscape value, and a local designated site of biodiversity.	None	Low - the site is in a remote location, accessed via narrow county lanes.	Low - surrounded by open countryside/farm land.	Nothing in immediate vicinity. Nearest Sittingbourne 4 kms.	Poor	High quality landscaped environment, with ample parking and servicing space.	Good
R9	Spade Lane Coldstore		Rural west	No	A large warehouse with various auto repair units in small industrial units to the rear.	7.9	Storage and Distribution (B8)	Outside the built up area	None	Site backs onto open countryside.	None	Middling - on the busy A2, but not at a junction	Surrounds are non-industrial, mainly agricultural.	Limited provision in Rainham 1.5 kms. Nearest major offer Sittingbourne 7.5 kms.	Reasonable	Building set back from the road with plentiful landscaping and parking. Servicing to side and rear.	Good
R15	Lamberhurst Farm, Yorklets (with proposed expansion)		Rural east	No	<p>Collection of former farm buildings on a 2.3 ha site in rural location in the east of the Borough, now used for storage and distribution of material supplies, workshops for motor repair and MOTs and some limited vehicle open storage.</p> <p>The site is remote and accessed via a narrow country lane. (the site is within Area of Search 5)</p>	2.3	Mixed B uses	Outside the built up area	<p>Allocation for employment uses promoted through Reg 19 (rep LPR2470) (Pol A5), would expand the site by 3.2 ha on land immediately to the south and provide 7,246 sq m employment floorspace (option 1).</p> <p>Reg 19 refers to potential for this site, which extends over the Borough boundary, to be part of a wider proposal for a mixed use settlement as part of a joint approach with neighbouring Canterbury.</p> <p>At Reg18 (REG3220) a more expansive option 2 was promoted for B2/B8 units extending further north as part of a much more comprehensive mixed use proposal that could provide net additional floorspace up to 36,836 sq m on 10.8 ha.</p>	Access via narrow rural lanes & located in open countryside with the Swale Level Area of high landscape value immediately to the south.	None	Low - in the countryside.	Low - no other employment uses nearby.	Limited provision 1.0 kms High Street. Whitstable 6kms.	Poor	Poor - unplanned former agricultural buildings without clear parking and servicing areas and no internal landscaping.	Poor
R16	A2 Dunkirk 1 & 2		Rural east	No	Two small industrial estates, both with a mix of activity. The main activity appears to be distribution.	1.3	Storage and Distribution (B8)	Outside the built up area	None	Site limitations in the case of the most eastward site, and development in countryside/small settlements for both. Residential also neighbouring in both cases.	Minor	Low - in the countryside.	Middling - some employment uses nearby, and wide range of activity in Dunkirk village in addition to residential.	Limited provision in Boughton 1.5 kms, and Canterbury 7kms.	Poor	Sites have grown incrementally, but have managed parking and servicing - per individual site in the case of the area furthest east, and largely collectively in the case of the area to the west (Dunkirk Industrial Park)	Reasonable
R8	Waterham Industrial Estate		Rural east	No	<p>A small industrial estate in a rural location with junction access to the A299 (Thanet Way). The site is bordered by a small number of residential and two very large glass houses. The principle use is storage which occupies the newer units, but some of the older units are used for engineering activity.</p> <p>Site area includes 0.5 ha on adjacent site with planning permission (same site was promoted in call for sites).</p>	3.1	Storage and Distribution (B8)	Outside the built up area	<p>2021 planning permission for 3 new industrial units totalling 1,400 sq m on land of 0.5 ha immediately east of the existing Estate. All three are for named businesses seeking expansion - two are currently at Waterham and the third in Canterbury.</p> <p>Call for sites representation (CFS5) for the same site for employment use.</p>	No relevant policy designations	Minor	Low - in the countryside.	Dwarfed in breadth by the scale of the nursery glass houses.	Limited provision in High Street. Nearest centre Whitstable 5.5 kms.	Reasonable	Whilst in the countryside the estate lacks soft landscaping, but the parking and servicing areas are ample.	Reasonable

EXISTING EMPLOYMENT AREAS

1	2	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34
BASIC INFORMATION		Strategic accessibility (road,		Local access by road	Score	Public transport access		Score	Vacancy	Vacancy Score	Other market intelligence e.g. market history, competing supply nearby, occupiers known to be moving in/out,	Score	REVIEW / RECOMMENDATION		Are there any constraints on redevelopment / intensification / extension?	When are these constraint(s) likely to be resolved?	Recommend-ation
Site ID.	Site name	Proximity to Mway/ principal roads [kms]	Score	Site junction and quality of access to the principal road network		Is the site close to a railway station (within 400m)?	Station name, number of bus stops within a 400 m radius						If the site retains its current use, will it be occupied?	Are there opportunities for redevelopment / intensification / extension?			
R5	Broad oak Enterprise Village	J5 M2 10kms. A249 J 6kms.	Reasonable	Whilst the principal route is not far away the two alternative access links are via narrow rural lanes, larger vehicles need to travel north into Sittingbourne to access the A2 and A249 to be able to reach the M2.	Poor	No	3	Poor	None	Nil	Located close to KSP the site is currently occupied by a single company. Units are of mixed quality, but capable of reoccupation if current occupier vacates.	Reasonable	Hard to tell	No	Access and countryside policy are the key constraints.	Not in the Plan period	Safeguard
R9	Spade Lane Coldstore	M2 J4 in 7.7 kms. Immediate access to A2.	Reasonable	Good dedicated junction on A2. But link to M2 J4 is via Gillingham.	Reasonable	No	0	Very Poor	None	Nil	The site is occupied by multiple tenants. In the large warehouse the site is shared by a produce company and a logistics company (Inter automotive Interiors). The smaller workshops to the south have multiple tenants. The site may have limited attraction for alternative employment uses due to remoteness and access issues. However, the site offers opportunity for the future expansion of the existing main logistics use should that be needed.	Reasonable	Yes	Yes, but only for the expansion of the existing logistics business on to land to the rear that is occupied by car repair businesses, and the land beyond that. See Call for sites reference: SBC17/095.	The current policy position (DM24 in particular) limits the scope for development in the countryside.	Available in the Plan period	Safeguard
R15	Lamberhurst Farm, Yorklets (with proposed expansion)	A299 (becomes the M2) 0.8kms (via minor roads).	Excellent	The access roads are very narrow country lanes.	Poor	No	0	Very Poor	None	Nil	Current provision - low quality units only suitable for local storage and local car mechanics. Opportunities to serve the rural economy are not finite. This site would be in competition with better located more prominent sites in the east of the Borough such as Waterham and Plumpudding Lane. Question mark over whether there is sufficient demand for any more employment at this location. The site lacks prominence to the A299 and the site access road is poor to be attractive to occupiers. Market demand is stronger to the west of the Borough where there is a greater critical mass of similar uses and better links to London. Site is only likely to be attractive to local occupiers who have links to the area. Viability is likely to be challenging in this area, as rents for units in this location will be lower than seen elsewhere.	Poor	Likely	Limited due to the finite potential in the east of the Borough where demand is lower than in the west. Limited to intensification or small scale expansion because of the constraints. (refer to Area of search 5 assessment) Additionally significant landscape, heritage and transport constraints.	The current policy position (DM24 in particular) limits the scope for development in the countryside, particularly here where it is adjacent to the locally designated area of high landscape value. Plus the constraints of poor access.	Available in the Plan period	Safeguard
R16	A2 Dunkirk 1 & 2	M2 J7 4.2kms (via minor roads).	Excellent	The 3.5 km route - Canterbury Road to the M2 J7 is narrow in places and goes through settlements.	Poor	No	9	Reasonable	None	Nil	Units are of a reasonable quality and will be likely to be taken up if current occupiers re-locate. Due to the rural location the units may struggle to be re-occupied should the market weaken.	Reasonable	Likely	No	Development in the countryside / rural settlements. Neighbouring residential.	Not in the Plan period	Safeguard
R8	Waterham Industrial Estate	A299 (that becomes M2 at J7) in 0.5 kms.	Excellent	Access via the High Street is narrow, but adequate to meet the relatively low level of use and the small number of large vehicles accessing the site.	Reasonable	No	3	Poor	None	Nil	Existing Estate is a mix of newer and older units, but all are of reasonable quality. Units will be attractive to occupiers throughout the plan period. The permitted units are likely to be constructed and available in 2023.	Good	Yes	Modest expansion site has planning permission.	The current policy position (DM24 in particular) limits the scope for development in the countryside.	Available in the Plan period	Safeguard

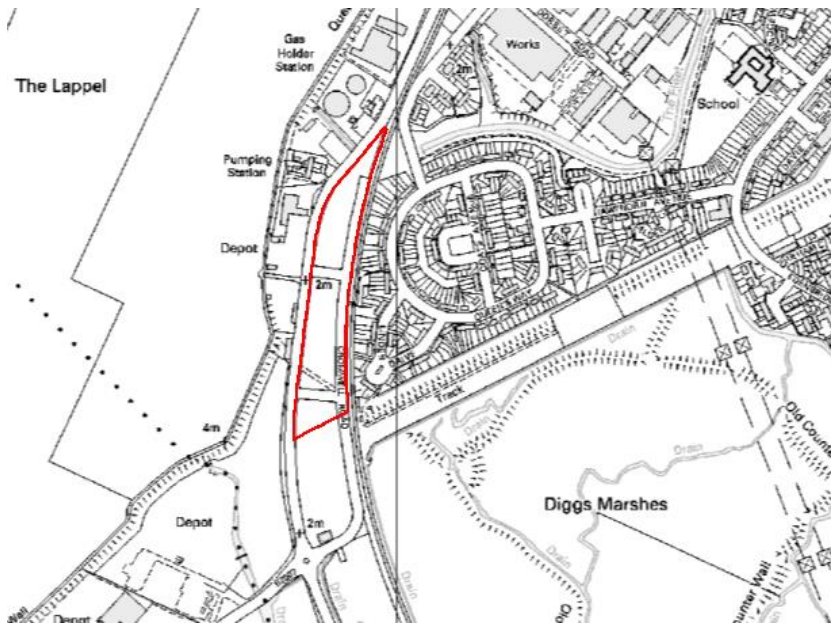
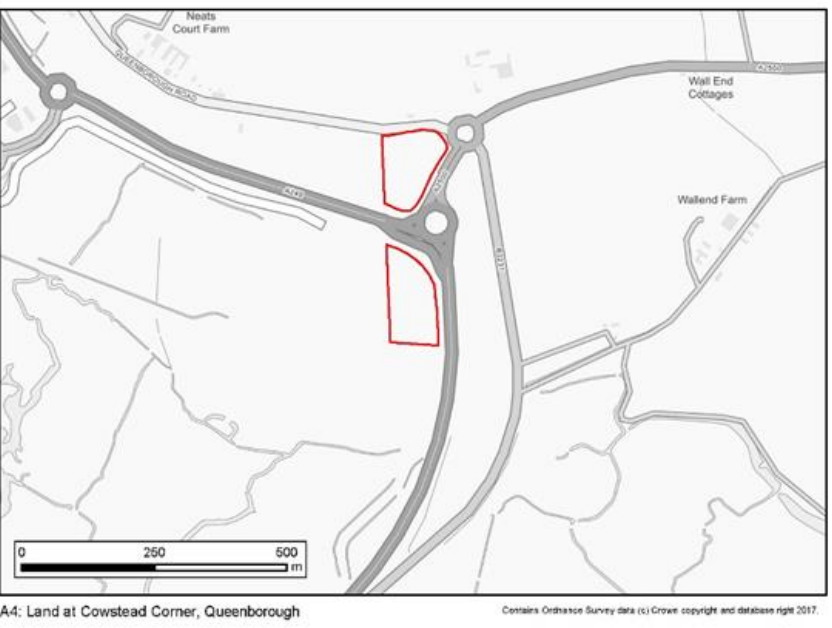
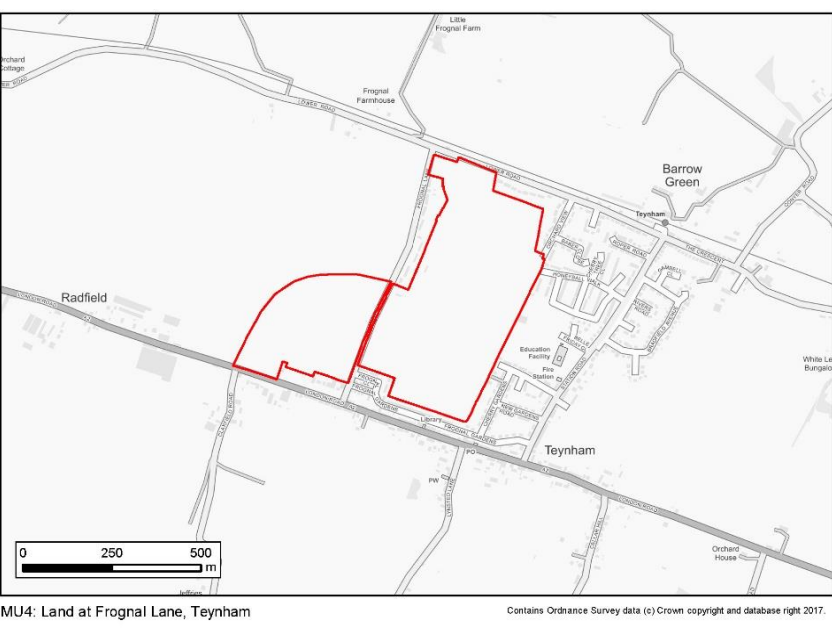
EMPLOYMENT / MIXED USE INCL EMPLOYMENT ALLOCATIONS

1 BASIC INFORMATION		3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18 CONSTRAINTS	19	20	21 ATTRACTIVENESS TO OCCUPY External environment
Site ID.	Site name	Site location map	Market area	Site description	Current use	Is the site previously developed land?	Site area (ha)	Develop-able area for Emplt (ha)	Committed Industrial floorarea (sq m)	Committed Office floorarea (sq m)	Site's sequential location	Primary type of employment	Office / Industrial	Proposed principle use	Any planning designations	Planning History	Detail any constraint(s) to delivery of whole or part of site? (inc. physical and policy)	Overall constraints?	Is this site available?	Prominence of site
A1i	Ridham and Kemsley, Sittingbourne		Sittingbourne	Large greenfield site transected by Barge Way effectively dividing the site into two parcels, both of which have access provided off roundabouts on Barge Way. The neighbouring activities are a mix of heavy industrial (paper recycling), regional distribution and some light industrial in the Kemsley Fields Business Park. Rail head link to the Docks.	Vacant development plots	No	41.9		64,476		Within the built up area	Mixed B uses	Industrial	Site allocated for 149,200 sq m industrial - B2 and B8 uses (@40% plot ratio = 37ha). KCC monitoring identifies potential for circa 145,000 sq m. The site is particularly suited for B8. Probable reduction in developable area (area measures 41.9, but 37 ha for development) on account of pylons/cables crossing site.	Area of High Landscape Value (Kent Level) bordering the northern part of the site. The site sits within the 'built up area boundary'	Development brief identifies 149,200 sq m available for B class development. On the west side of Barge Way, there is extant planning permission for 2,534sqm for a thermal conversion and energy generation plant.	The need to protect the nearby habitat could have an impact on the type and intensity of use. However, the site is wedged between existing large and/or heavy industrial uses. Southern end of site is crossed by pylons / power lines could reduce the developable area.	Minor	Immediately available	Middling - not on or visible from the A249, but prominently located on roundabouts on link road.
A2	Land south of Kemsley Mill, Ridham Avenue		Sittingbourne	Open land off Swale Way immediately to the south of the Paper Mill.	Former grazing land, now not in productive use.	No	3.3	3.3	8,000		Adjacent to built up area	Mixed B uses	Industrial	3.3ha site is allocated (Policy A2) for B class uses, and Local Plan considers sufficient to accommodate 8,000 sq m.	A small section of the southern half of the site is designated as 'coastal change management area', with a 'local designated site of biodiversity' within the site to the far north east corner. Immediately to the southeast is Castle Rough, a scheduled Ancient Monument. The site is within the built up area boundary.	Outline planning permission (14/500327/OUT) exists on site for 'up to 8,000sqm of B1 and B2 space'.	The site backs onto a large heavy industrial site, and could to some extent buffer the impact of that activity, but there are landscape designations and a scheduled ancient monument immediately adjacent to site (Castle Rough) that will constrain the massing possibilities on the site.	Minor	Immediately available	High - with direct access and visibility from Swale Way.
A5	land at Selling Road, Faversham		Faversham	Land and farm buildings situated on the western side of Selling Road, and to the south of the new leisure premises fronting the A2.	vacant/under-utilised buildings	Yes	1.8	1.8	6,300		Adjacent to the built up area	Mixed B uses	Industrial	Allocation A5 - 6,300 sq m of B class. Achieved by reusing the existing buildings on site plus limited new build.	Site is mostly within the Brickearth minerals area, but no landscape designations specifically on the site. However, the site is outside the built-up area boundary and backs onto open countryside, and is not far from the Kent Level AHLV, and therefore inter alia Policy D24 (conserving & enhancing valued landscapes) applies.	No extant planning permissions on site.	The pair of East Houses on site are listed, which together with the semi-rural location and the adjacent listed Macknade Manor House constitute major constraints.	Major	Immediately available	Low, semi-rural location accessed via a country lane.
A6	Land at Graveney Road, east of Faversham		Faversham	Farmland adjacent to new residential and small scale established commercial and employment uses to the west, with open countryside to the east, railway line north and possible access of Graveney Road immediately south.	agriculture	No	2.0	2.0	7,000		Adjacent to the built up area	Mixed B uses	Industrial	Local Plan allocation A6 identifies the site as suitable for 7,000 sq m of B1 and/or B8 floorspace, or possibly B2.	The site is allocated for employment use (A6). North boundary borders a local designated site of biodiversity. Western boundary adjoins the established small business centre and the new residential.	No extant planning permissions on site. Allocated in the Local Plan for employment use, and was carried forward in the Reg 19 plan.	Site would need its own separate access on to Graveney Rd as access cannot be taken through the landscape buffer or the residential or commercial area to the west, or through land to the east. The site's relative small scale may make this impractical. The site cannot integrate with the commercial area to the west because of the landscape buffer and is very remote from Faversham's main employment areas. The site is raised, compared to the open countryside to the east, and is within a minerals safeguarding area. Access improvements are needed to Graveney Rd.	Minor	Available in the plan period	Low - Graveney Road, but this is a minor route.
MU6	Land at Lady Dane Farm, east of Love Lane		Faversham	The residential elements of the MU6 allocation have been developed, but the two phases of employment uses on the southern side adjacent to the railway line have not come forward for the 10 ha (20,000 sq m) identified in the Plan, nor so far has the land been serviced.	agriculture	No	26.6	10.0		20,000	Adjacent to the built up area	B1	Office	The Local Plan development concept identifies scope for 20,000 sq m of office space on a 5 ha area forming an office park environment. Delivery requires improved infrastructure, and specifically a new access road link to the A2 and local junction improvements.	The site is designated as a 'proposed mixed use allocation', is within the built up area boundary. The Reg19 Plan revised the requirement to an employment hub of at least 10 ha. The brickearth safeguarded area washes across most of the area, but there are no landscape designations.	2016 planning permission for mixed use including 2,000sqm of B1a and 5,385sqm of B1c. Residential elements are now complete. Application permitted (May 2023) for residential plus commercial units for Class E uses (990 sq m office) and 10,871 sq m industrial /flexible space.	No specific on-site constraints, but to the west of Love Lane is the Faversham Conservation Area, and a Local Area of Biodiversity lies to the north of the railway line.	Minor	Immediately available	Low - Love Lane is a minor route.
MU7	Perry Court Farm, Faversham		Faversham	A well located site between the A2 and M2, and adjacent to J6 of the M2. Housing element of the mixed use allocation is now complete. No progress on the permitted office uses.	agriculture	No	30.3	5.0		15,675	Within the built up area	B1	Office	The Local Plan development concept seeks 3 Ha (18,525sq m) of B1 space, with a further 2 Ha safeguarded for possible further B1 class use. As identified in the outline permission (15/042654), office should comprise the majority element of the mix.	There are no landscape or other such designations relating to the land, but the land south of the M2 is Kent Downs AONB and the Kent Level Area of High Landscape Value.	2017 outline planning permission for mixed use, including 11,875sqm of B1a, 3,800sqm of B1b, and 2,850sqm of B1c. Reserved matters application submitted, but only for residential element.	Potential impact on the setting of the AONB and SPA.	Minor	Immediately available	High - on the M2 and adjacent to link road, albeit visibility will need to be minimal due to AONB to south of M2.
A1ii (also SH15)	Neatscourt		Sheerness	Greenfield site overlapping the A249 that has been part developed (see allocation sheet for review of undeveloped parcels). The whole allocation measures 53.7 ha (inclusive of the road network within it), but the Morrison and leisure development and the under-construction Aldi distribution warehouse account for all but approximately 19ha.	Retail park, retail distribution and vacant development plots	No	53.7	19	76,064		Adjacent to the built up area	Other	Industrial	Industrial uses	The area is within FZs 2 & 3 and a proposed regeneration area. No nature designations on the site. However, to the south the site is bordered by an 'Area of High Landscape Value', 'coastal change management area', and 'international and national designated site of biodiversity and geological nature'.	Application for a new manufacturing and distribution facility for Medicchem (5,196 sq m of B1, B2 and B8) on land to the north of the A249 (northern-most parcel).	None on the site directly. To the south the site is bordered by an 'Area of High Landscape Value', 'coastal change management area', and 'international and national designated site of biodiversity and geological nature'.	Minor	Yes	Excellent - directly on the A249. A particularly good location for logistics and distribution, but also for manufacturing requiring high visibility.

EMPLOYMENT / MIXED USE INCL EMPLOYMENT ALLOCATIONS




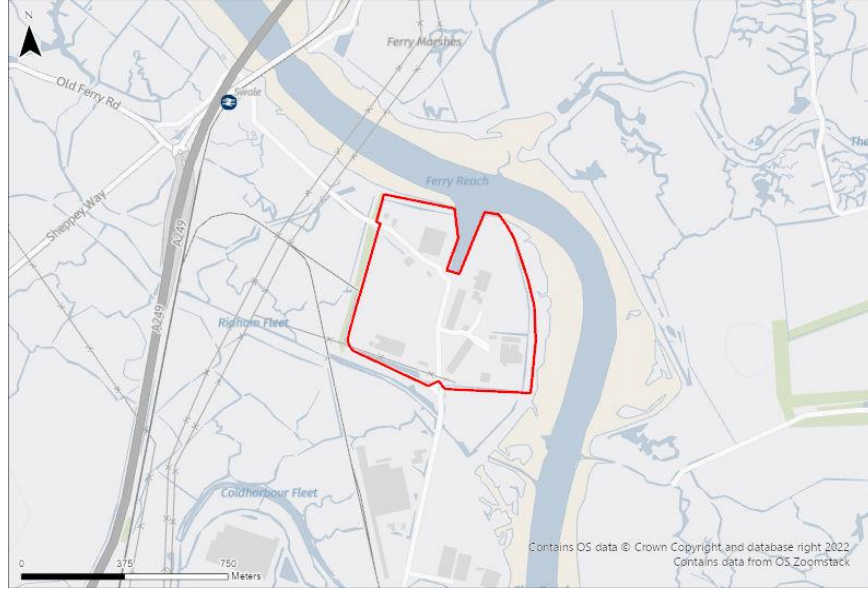


1 BASIC INFORMATION		22 ERS	23	24	25 <i>Internal environment</i>	26	27 <i>Strategic accessibility (road)</i>	28	29 <i>Local access by road</i>	30	31 <i>Public transport access</i>	32	33	34 <i>Market Signals</i>	35	36	37 REVIEW / RECOMMENDATION Overall Review	38	39	40
Site ID.	Site name	Compatibility of surrounding uses	Access to amenities	Score	Any problems with shape, gradient, boundary etc.?	Score	Proximity to Mway/principal roads (kms)	Score	Site junction and quality of access to the principal road network	Score	Is the site close to a railway station (within 400m)?	Station name & number of bus stops	Score	Evidence of developer / occupier interest?	Other market intelligence e.g. market history (how long on the mkt), competing supply nearby, occupiers known to be moving in/out.	Score	Is the site likely to be attractive to employment occupiers?	Is the site suitable for the assessed use?	Assuming constraints are resolved, what are the prospects of the site being developed and occupied?	Recommend-ation
A1i	Ridham and Kemsley, Sittingbourne	High - neighbouring uses are large scale distribution and heavy industrial activities.	Nothing in immediate vicinity.	Reasonable	No	Excellent	A249 1.6 kms via Swale Way, and J5 M2 8.6kms (via A249).	Good	Site(s) have access provided off the roundabout junctions, and the link road to the A249 (Swale Way) is recent new purpose built high quality infrastructure.	Excellent	No	0	Very poor	Agents report there has been some recent interest from occupiers	The site is currently being marketed for B8/B2 uses. The site is well located next to existing B8 space. There are limited competing sites that are cleared and ready to be developed. The site will likely be developed for B8 distribution within the plan period.	Good	Yes	Yes	High - good location for warehousing and/or general industrial uses.	Retain
A2	Land south of Kemsley Mill, Ridham Avenue	High - neighbouring uses are large scale distribution and heavy industrial activities.	Nothing in immediate vicinity.	Reasonable	The site slopes down from north to south, but unlike neighbouring areas is not crossed by pylons.	Reasonable	A249 1.4 kms via Swale Way, and J5 M2 8.4kms (via A249).	Good	The site has a ready constructed access spur off the Swale Way. The link road to the A249 (Swale Way) is recent new purpose built high quality infrastructure.	Excellent	No	3	Poor	Currently under offer	Currently being marketed for general industrial. Plans are for units of a higher quality than other estates in Sittingbourne. Site is well located and would be suitable for B2 and B8 occupiers.	Good	Yes	Yes	High - good location for warehousing and/or general industrial uses.	Retain
A5	land at Selling Road, Faversham	Restaurant in a Grade 2 listed Manor House and country stores adjacent with open countryside to the south.	Town centre 2kms	Poor	The listed Oast Houses and the ecological and archaeological issues on site need to be respected.	Poor	J6 M2 2.0kms (via Canterbury Road & A251).	Excellent	Access road to A2 would need upgrading if large vehicles were to use the site, but site is close to A2.	Reasonable	No	18	Reasonable	n/a	The site is currently occupied by employment uses. Development has occurred north of the site for pub/restaurant use. Site is currently occupied at low intensity. Within a wider area being promoted for garden village development.	Reasonable	Yes	Yes	Good for niche / specialist B class rural offices/workshop type use.	Retain
A6	Land at Graveney Road, east of Faversham	Buffered by railway line and existing country store, and would need landscaping on eastern side where site meets open farmland.	None immediate. Town centre 1.6kms.	Poor	The site slopes down towards the open countryside, which will make any development more conspicuous.	Poor	Site close to two M2 junctions: J6 M2 3.2kms, & J7 2.8kms.	Good	The route to the M2 (Graveney Rd, Love Lane, Canterbury Rd and A251) is narrow in places and Love Lane in particular is not suited to large vehicles, and would require widening.	Reasonable	No	0	Very poor	n/a	Currently not being marketed for its allocated small scale employment use that is in demand in the area. Immediately to the west, the new residential has been completed. This site should be pursued because it could provide the type of walk to work small scale flexible space that has been delivered elsewhere in Faversham, and would complement the new housing.	Poor	Possibly	Possibly	Possibly - This is a comparatively small industrial land allocation (2 ha) that could provide the small scale flexible hybrid units that are in demand. However, there are other sites being promoted for employment development in the east Faversham area that would have better access to the highway network, and of a scale that offers potential for more comprehensive, and occupier attractive employment development. Consideration is needed of whether such sites are better suited to accommodate the Borough's employment need. However, when allocated the site (along with land to the south and south-west) were the extent of urban Faversham. All three sites were considered suitable and their location, for those available, acceptable. But if Faversham expands east then those sites closer the main strategic network become more attractive for industrial, logistics and warehousing. The original allocated sites become less preferable.	Consider revising the type of employment use and/or consider in the context of other promoted sites
MU6	Land at Lady Dane Farm, east of Love Lane	Middling - opposite a cemetery and some residential., and backing onto open countryside.	Limited provision on Selling Road. Town centre 1.8kms.	Reasonable	None, site is flat and of regular shape.	Excellent	Site can access M2 J6 & J7. J6 M2 2.6kms, & J7 2.2kms.	Good	The route to the M2 J6 (Love Lane, Canterbury Rd and A251) is generally good, but Love Lane is narrow in places, and is not suited to large vehicles, and would need widening to accommodate development.	Reasonable	No	6	Reasonable	Evidence of both developer and occupier interest.	The traditional office market has weakened in recent years, and development viability is very challenging. What office requirements there are, are for small units that would need to be speculatively built to attract occupiers, but it is not viable to do so. Occupiers prefer to be located in the town centres (benefit from public transport access and amenities) or the larger business parks that have good access and on-site amenities this means traditional office in edge of town locations such as this are very challenging. However, with significant new housing recently provided and more in the pipeline, and the post-Covid change in working habits that has encouraged many to adopt a 'walk to work' lifestyle, there is a need and opportunity for the type of flexible hybrid workspace seen at the Eurocentre in Faversham as part of a more flexible approach to employment provision in this locality. Access along Love Lane is sub-optimal, but it does provide a direct link onto the A2 and junction 7 of the M2 - therefore, rather than traditional office the site could be better suited to a mix of hybrid workspace catering for the walk to work local residents and a range of industrial uses. The market is currently tight and demand is strong. East of Faversham is not an optimal location for industrial. The traditional office market has weakened in recent years, and development viability is very challenging. What office requirements there are, are for small units that would need to be speculatively built to attract occupiers, but it is not viable to do so. Occupiers prefer to be located in the town centres (benefit from public transport access and amenities) or the larger business parks that have good access and on-site amenities this means traditional office in edge of town locations such as this are very challenging. However, with significant new housing recently provided and more in the pipeline, and the post-Covid change in working habits that has encouraged many to adopt a 'walk to work' lifestyle, there is a need and opportunity for the type of flexible hybrid workspace seen at the Eurocentre in Faversham as part of a more flexible approach to employment provision in this locality.	Good	Yes	No	Consider revising the type of employment use and/or consider in the context of other promoted sites	
MU7	Perry Court Farm, Faversham	Backing on to small number of residential, and otherwise open farmland and road infrastructure.	None immediate, but local centre proposed as part of the wider site. Faversham town centre 1.7kms.	Good	None	Excellent	Immediate access to J6 M2.	Excellent	New junction on to the A251 will be needed.	Excellent	No	0	Very poor	Known developer interest	Given its proximity and prominence to the M2, it is one of the better sites in Faversham to accommodate the high industrial/warehouse demand. Therefore, the site could be better suited to a range of industrial uses plus a mix of hybrid workspace that cater for the walk to work local resident market. The market for industrial/warehousing is currently tight and demand is strong. East	Good	Yes	No	Consider revising the type of employment use and/or consider in the context of other promoted sites	
A1ii (also SH15)	Neatscourt	Good - backs on to industrial/ open storage uses and retail/leisure to the north. Open farmland to the south and east.	Immediate access to Morrisons superstore and leisure activity, and Queenborough 1kms.	Excellent	Part developed area provides modern infrastructure needs associated with a large distribution facility and other commercial/retail activity. The shape of some of the remaining allocated land is narrow, and may restrict some uses.	Excellent	J5 M2 13kms (via A249).	Excellent	Excellent - immediate access onto the A249.	Excellent	No	6	Reasonable	n/a	Currently being marketed for mixed use housing and employment. Some of the allocation to the north has been lost to retail development. To the east of the allocation A1ii have recently developed a 600,000 sq ft regional distribution centre. Given the site connectivity, prominence and reduced site area the balance of the site is likely to be developed within the plan period.	Good	Yes	Yes	High - good location for warehousing and/or general industrial uses.	Retain

EMPLOYMENT / MIXED USE INCL EMPLOYMENT ALLOCATIONS

1 BASIC INFORMATION		3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18 CONSTRAINTS	19	20	21 ATTRACTIVENESS TO OCCUPY External environment
Site ID.	Site name	Site location map	Market area	Site description	Current use	Is the site previously developed land?	Site area (ha)	Develop-able area for Emplt (ha)	Committed Industrial floorarea (sq m)	Committed Office floorarea (sq m)	Site's sequential location	Primary type of employ-ment	Office / Industrial	Proposed principle use	Any planning designations	Planning History	Detail any constraint(s) to delivery of whole or part of site? (inc. physical and policy)	Overall constraints?	Is this site available?	Prominence of site
A3 (and SH8)	Land at West Minster		Sheerness	A narrow strip of vacant land split into two parcels by Newland Road which bisects the site. Cromwell Road that marks the eastern boundary does not connect with A249 at its northern end. The site has been allocated for many years, but hasn't progressed, and in response to its potential landscape, biodiversity and archaeological impacts the site has been reduced in scale to include only the most northerly 2.5ha.	vacant land	No	2.5	2.5	7,500		Within the built up area	Mixed B uses	Industrial	The size of the site has been reduced in scale (from 6.5 to 2.5ha) to reflect landscape, biodiversity and archaeological impact concerns. Local Plan allocation of 2.5 ha will deliver 7,500 sq m B class.	Area of High Landscape Value (North Kent Marshes) covers the southern and middle part of the site. Only the northern part is undesignated and within the built up area boundary.	2015 permission for 7,650sqm of B1 and B8 use.	Residential to the east of the northern parcel. This, like large parts of the Isle of Sheppey is within FZ3.	Major	Available in the plan period	High - because of its location on the A249.
A4	Land at Cowstead Corner, Queenborough		Sheerness	Two separate parcels of open land off the A249, immediately to the east of the new Aldi regional distribution unit.	Former agricultural land, now not in productive use.	No	2.8	1.6	5,600		Within the built up area	Mixed B uses	Industrial	The southern parcel (1.6ha) is suitable for a 'modest' extension of the Neatscourt employment area of circa 5,600 sq m B class use. The northern parcel (1.36ha) is identified as potentially suitable for an hotel.	The site is an employment allocation, with a proposed regeneration area bordering both sites western edge. The southern site is also bordered to the south by an 'Area of high landscape value'.	No extant planning permissions.	No specific constraints, other than the southern parcel is relatively small.	Minor	Immediately available	Excellent - given both parcels are located on the A249 / A2500 roundabout junction.
MU4	Land at Frognal Lane, Teynham		Rural west	Greenfield site on the edge of Teynham village / A2. In this part of the A2 corridor between Sittingbourne and Faversham there are some logistics warehouses associated with agri/food, but no large general industrial estates.	agriculture & open space	No	30.6	8.2	26,840		Within the built up area	Mixed B uses	Industrial	The Local Plan development concept is for a mixed use scheme including 26,840 sq m of commercial campus style B class employment uses located on the rear of the site.	The site is designated as a 'proposed mixed use allocation'. The western section of the site (west of Frognal Lane) is outside the built up area boundary.	Undetermined 2016 planning application for mixed use scheme including 26,840 sq m B1 use.	The site identified for employment uses is in close proximity to existing residential.	Minor	Immediately available	Middling - the site is on the A2, but the employment element is proposed for the rear of the site.

EMPLOYMENT / MIXED USE INCL EMPLOYMENT ALLOCATIONS																				
1	2	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40
BASIC INFORMATION		RS			<i>Internal environment</i>		<i>Strategic accessibility (road)</i>		<i>Local access by road</i>		<i>Public transport access</i>			<i>Market Signals</i>			REVIEW / RECOMMENDATION			
Site ID.	Site name	Compatibility of surrounding uses	Access to amenities	Score	Any problems with shape, gradient, boundary etc.?	Score	Proximity to Mway/principal roads (kms)	Score	Site junction and quality of access to the principal road network	Score	Is the site close to a railway station (within 400m)?	Station name & number of bus stops	Score	Evidence of developer / occupier interest?	Other market intelligence e.g. market history (how long on the mkt), competing supply nearby, occupiers known to be moving in/out.	Score	Is the site likely to be attractive to employment occupiers?	Is the site suitable for the assessed use?	Assuming constraints are resolved, what are the prospects of the site being developed and occupied?	Recommend-ation
A3 (and SH8)	Land at West Minster	Industry and open car storage to the west, but residential to the east.	Queenborough 1.9kms.	Poor	The land is a narrow wedge of land between two roads and backs on to the railway line.		J5 M2 16kms (via A249).	Reasonable	Direct access via Cromwell Road off a roundabout on A249.	Excellent	No	6	Reasonable	Sold subject to contract and planning consent	The site has a 2015 outline permission for B2 and B8 uses. Despite the narrow and elongated nature of the site which may deter a single large occupier the site could be suitable to multiple smaller occupiers. Given the tight nature of the market for smaller units the site is likely to be developed over the plan period.	Good	Yes	Yes	High - the site's excellent access to the A249 and is largely unconstrained, albeit it narrows significantly to the north and has floodrisk issues (in common with most of Sheerness/Sheppey), make it an attractive site for industrial uses.	Retain
A4	Land at Cowstead Corner, Queenborough	Middling - large scale distribution and site allocated for employment use immediately to the west, but otherwise farmland.	Morrisons' Neatscourt retail and leisure development 1.1 km away.	Reasonable	None, other than two relatively small parcels.	Good	J5 M2 12.5kms (via A249 that is immediately accessible).	Excellent	Excellent direct access to the A249. But access may need to be taken in both cases through the development land to the west.	Excellent	No	0	Very poor	n/a	Located adjacent to Neatscourt allocation, which has recently benefited from the Aldi development. The allocations are well located and will likely be developed alongside Neat's Court.	Good	Yes	Yes	High - good location for warehousing and/or general industrial uses.	Retain
MU4	Land at Frogna Lane, Teynham	There are no large employment areas in Teynham, and the adjacent uses are residential. However, the western parcel is close to the Fowler Walch Cool Chain warehouse facility and the small number of businesses on the northern side of London Road opposite Cool Chain.	There are shops and amenities on the A2 in Teynham, and Sittingbourne is 5kms.	Reasonable	None	Good	M2 J5 is 11 kms (via A2 & A249).	Reasonable	Good access arrangements on the A2, but to access M2 requires either passing through Sittingbourne or around Faversham.	Reasonable	No	9	Reasonable	Site currently has an undetermined planning application for employment uses	The site is in a reasonable location with immediate access onto the A2 but the local market is unproven for B class development. But there is limited precedence of recent B class development in this location. But agents report that as long as there is reasonable connectivity development out with the main urban areas would be desirable to occupiers.	Reasonable	Yes	Yes	Reasonable - but competition from better located sites.	Retain

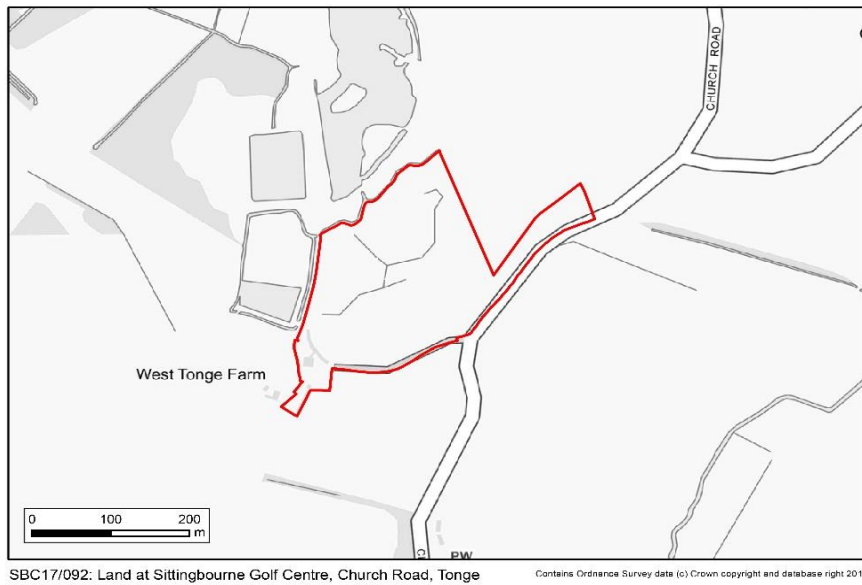
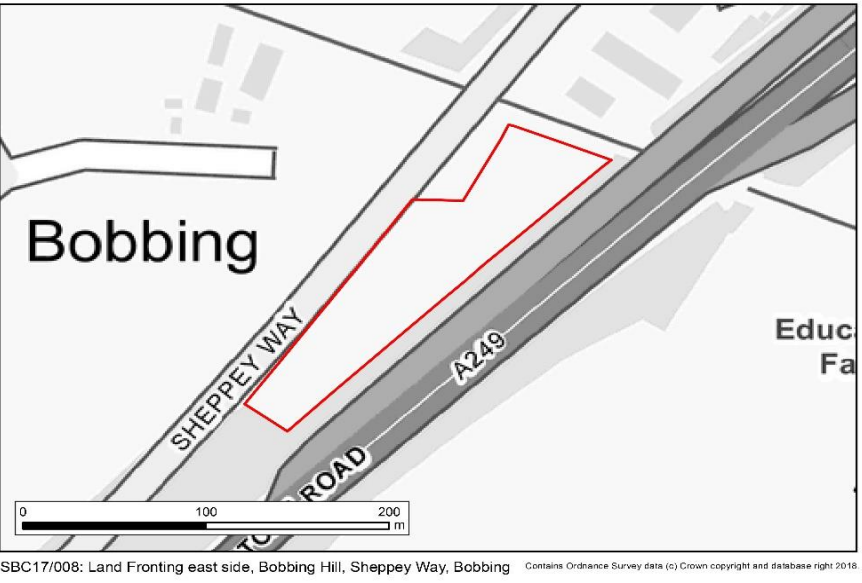
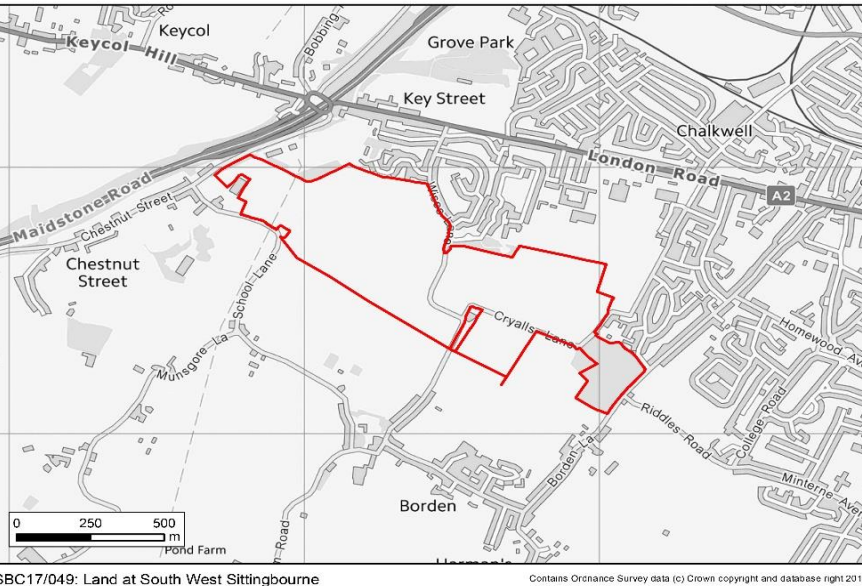

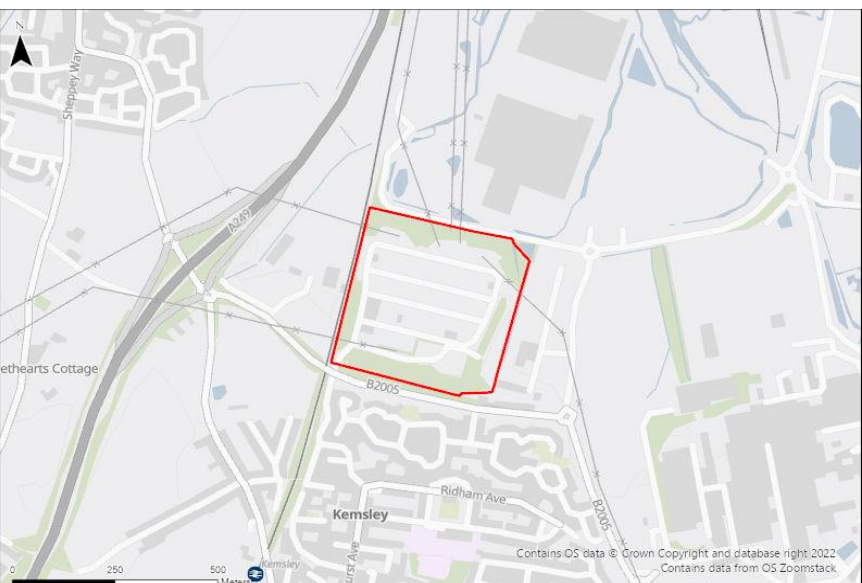
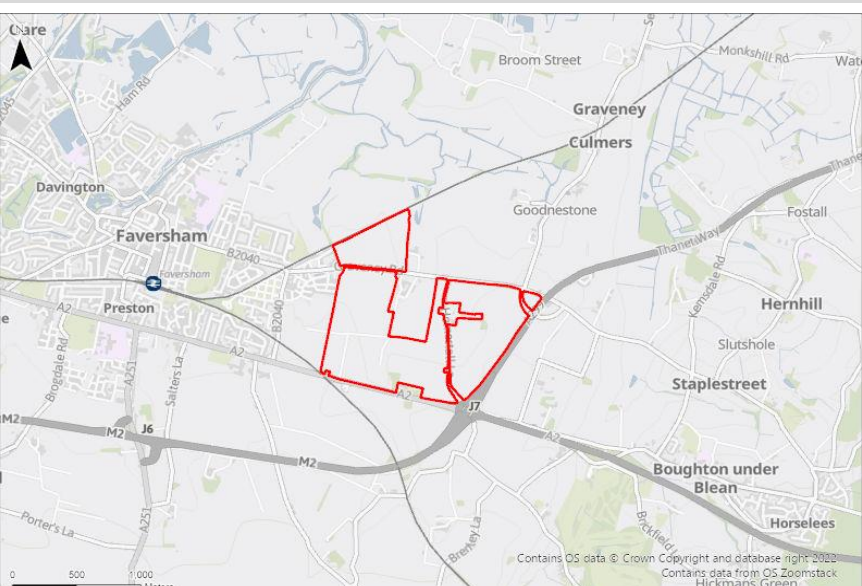
SITES POTENTIALLY SUITABLE FOR EMPLOYMENT USES

1	2		3	4	5	6	7	8	9	10	11	12	13	14	15	16
CfS ID.	BASIC INFORMATION		Site location map	Market Area	Site description	Current use	Is the site previously developed land?	Area (ha)	Sequential location	Proposed principle use	Principle land use (office/indl)	Planning designations	Planning History	(inc. physical and policy)	Overall constraints?	Is this site available?
23	Milton Creek			Sittingbourne	Open land to the rear of Lloyds Wharf at the end of Milton Creek. The site is currently scrub, with the Dolphin Sailing Barge Museum on the Wharf site to the north and the Sittingbourne Retail Park to the south, with more retail and leisure facilities / visitor destinations to the west. The area was formerly marine related industrial uses, but is now predominantly retail and leisure related uses. To the east is Crown Quay Lane an existing employment area.	retail / leisure	Yes	1.0	Within 400m of a town centre	N/A	N/A	Within a coastal change management area. Within Sittingbourne built up area (ST3) Within flood zone 2/3. Within a mineral safeguarding area for River Terrace within the adopted Kent County Council Minerals and Waste Local Plan.	No known relevant planning history. P APP IN	Within Flood Zone 2 and 3 and Coastal Change Management area.	Minor	Unknown
24	Ufton Court			Sittingbourne	Commercial orchard on the southern outskirts of Sittingbourne.	Commercial orchard	No	26.0	Adjacent to the built up area	Residential	No employment uses proposed	The entire site is designated Important Local Countryside Gaps (DM25) Hearts Delight Road to the west of the site is a rural lane. The site is also located in close proximity to the Kent Downs AONB	No known relevant planning history.	The principle constraint to employment use would be the lack of suitable access, with no obvious means of delivering this as surrounding roads are designated Rural Lanes. Site is part of the strategic gap (DM25). Proximity to Kent Downs AONB would limit scale of buildings. Neighbouring existing (and new) residential.	Major	Available Immediately
CFS14	Eyehorn Farm, Munsgore Lane, Oad Street, Borden			Sittingbourne	The site is farmland and in the open countryside. While close to the route of the M2/A249, it is remote from junction access.	Equestrian, agricultural and residential	Yes, partly	45.0	Outside the built up area	Mixed use	Industrial	The site is located outside but close to the Kent Downs AONB, and is partly within the Kent Minerals and Waste Plan Safeguarded Area - Brickearth Swale Areas.	Recent permissions for conversion of barns into dwellings.	Although it is in close proximity to the M2/A249, there is no easy junction access as this would have to be made through rural lanes/villages. Building height and scale would be constrained by the close proximity to the Kent Downs AONB.	Major	According to the promoter, the site is available within 1-5 years.
CFS24 (and R1)	Ridham Dock - redevelopment			Sittingbourne	Safeguarded dock facility on The Swale with heavy industrial processes mostly construction related, such as concrete batching and plaster, and materials recovery and waste management activity. Most activity is open, with the only large building being that needed for waste management. The dock facility is in three parts, and site coverage otherwise is generally low intensity employment uses. Promoter exploring how dock activity could be rationalised and employment activity intensified.	safeguarded docks	Yes	45.0	Outside the built up area	Mixed B uses	Industrial	Land in Ridham Dock is designated as Safeguarded Wharve. And a Policy CP1 Existing Strategic Employment location. The site is promoted through the 2022 call for sites for allocation for employment uses in addition to safeguarded wharves.	No known relevant recent planning history.	The site is bounded by the Site of Special Scientific Interest, international and national designated site of biodiversity and/or geological value (the SPA). The site is within Flood Zone 2/3	Minor	Available in the plan period
REG80	The Old Sale Field, Ruins Barn Road, Tunstall			Sittingbourne	Farmland to the west of Ruins Barn Road, north of Kent Science Park and surrounded by agricultural land. Remote from any employment area or settlement.	Agricultural	No	3.5	Outside the built up area	Incubator Hub	Industrial	Within an area designated as high landscape value. Ruins Barn Road is a designated Rural Lane. To the north is a Local Designated Site of Biodiversity under Policy DM28 of the Local Plan.	No known relevant planning history.	Remoteness and the rural road network are the key physical constraints. Access would be via Ruins Barn Road, which is a designated Rural Lane. Policy DM26 would therefore apply. Located within an area of high landscape value. Policy DM24 is therefore engaged.	Major	Unknown
SBC17/005	Land at Pheasant Farm (west), Howt Green, Sittingbourne			Sittingbourne	Relatively small parcel of white land next to the former Floplast head office (to the south - now vacant), within the Important Local Countryside Gap area to the west of Sittingbourne and the A249. Access on to the A249 is poor requiring either a loop through Iwade or through Bobbing village.	vacant open land	No	1.6	Outside the built up area	Light Industrial (B1c)	Industrial	Important Local Countryside Gaps (DM25), beyond the built-up area boundary, and the Local Plan (pol ST3) applies, where the primary objective is protection from isolated and/or large scales of development. Kent Minerals safeguarded areas (Brickearth).	No recent planning history (5 years)	The principle constraint is the poor access on to the SRN (A249) that would require vehicles to pass through neighbouring villages.	Major	Immediately available

SITES POTENTIALLY SUITABLE FOR EMPLOYMENT USES

BASIC INFORMATION		17 ATTRACTIVENESS TO OCCUPIERS <i>External environment</i>	18	19	20	21	22	23	24	25	26	27 REVIEW	28 RECOMMENDATION				30	29
C/S ID.	Name	Prominence of site	Compatibility of surrounding uses	Access to amenities	Any problems with shape, gradient, boundary etc.?	<i>Strategic accessibility</i> Proximity to Mway / principal roads (M2/A249/A299) [kms]	<i>Local access by road</i> Quality of access to the principal road network	<i>Public transport access</i> Is the site close to a railway station (within 400m)?	Station name & number of bus stops	<i>Market Signals</i> Evidence of developer / occupier interest?	Other market intelligence	Is the site likely to be attractive to employment occupiers?	Is the site suitable for employment use?	Positives	Constraints	Prospect	Consider for employment allocation in the next plan	Potential employment area (Ha)
23	Milton Creek	Medium - close to town centre	Neighbouring retail and leisure uses will restrict scale and intensity of new industrial activities.	1 km from Sittingbourne Town Centre	None other than scale	2.4 km from A249 via B2006 (Staplehurst Road)	Scope for link to B2006. Staplehurst Road (B2006) is the link serving a number of existing business and retail/leisure parks.	Yes	Sittingbourne	None	Shift in recent years to retail and leisure activities replacing largely marine related industrial activities. Given the changing focus, marine related provision and/or small workshop based light industrial activity akin to that found at Standard Quay, Faversham (albeit this would need to be new build) would be appropriate. This could be provided as part of a mixed use development at Lloyd's Wharf.	Yes	Yes	strong market area	scale	Good	No	
24	Ufton Court	Low - adjoining rural and residential areas.	Issues with neighbouring (and potentially new) residential and open countryside.	1.5 km from Sittingbourne Town Centre	None	A249 and M2 located 2 km to the east, but junction access is via rural lanes and Oad Street village which is within the Kent Downs AONB.	Access to the A2/A249/M2, would need to be via Borden Lane or Hearts Delight Road. Neither route is suitable for vehicles servicing industrial areas.	Sittingbourne 1.6 km to the north.	The nearest bus stop is located approximately 200m to the north of the Site	Being actively promoted	In general market terms a site of this size to the south of Sittingbourne would be attractive to industrial/warehouse uses, in which there is low levels of supply and strong demand, but the site has poor access and prominence to the principal A roads and M2 motorway therefore making it unsuitable. Furthermore, the site would not be suitable for offices; demand is weak and what requirements exist are for small units and these occupiers won't commit to a pre-let/sale therefore space would need to be speculatively built, which is unviable.	No	No				No	
CFS14	Eyehorn Farm, Muns Gore Lane, Oad Street, Borden	Low - remote rural location	Large scale industrial would be incompatible with open countryside setting.	The site is located 3.2km from Sittingbourne Town Centre	None	The site is 0.5km from a junction on the A249	Junction access to the A249 via either Oad Street (South) or the A2 (north). The access to the A249 is close to the site, but would require vehicles to pass through rural lanes and villages en route.	No	4	The promoter states that there are a number of developers interested	The site's broad location, being located in the west of the Borough and close to the M2/A249 junction, could make it attractive to industrial/warehouse occupiers, but its site access is poor and it would require significant infrastructure improvements. Furthermore, the site has no prominence which is likely to deter any potential occupiers.	No	No				No	
CFS24 (and R1)	Ridham Dock - redevelopment	Middling - whilst the site is remote, the landscape is flat and the site can be seen from the A249 and other routes.	Good - part of the wider Kemsley Fields Business Park area, with large scale industrial activity.	Nothing in immediate vicinity.	All activity takes place within the dock compound.	J5 M2 11kms. A249 J 1.8kms via dedicated link.	A dedicated (albeit unadopted) route is provided to link to the A249 close to the Sheppey Bridge Crossing. This we understand is owned by Knauff whose manufacturing site is immediately to he south.	No	0	Being actively promoted.	A call for sites submission (CFS24) from CEG seeks intensification of the employment offer that the promoter considers could deliver as much as 100,000 sq m of floorspace for a wide range of employment activities. The promoter is preparing an indicative Masterplan. With the large Ridham and Kemsley allocation just to the south also with direct access on to the A249, and iwth the labour markets of Sheerness and Sittingbourne close by, this seems a sensible location to intensify industrial and logistics/distribution activity.	Yes	Yes	Owner interest Strong market area	Possible loss of wharfage	Possible	Yes	25
REG80	The Old Sale Field, Ruins Barn Road, Tunstall	Low - in remote rural location	Incompatibility with open countryside setting .	2.2 km from Sittingbourne Town Centre	None	No junction access to the M2.	Would need to pass through a number of villages on rural lanes to access A2/A249/M2.	No	0	Being actively promoted for an edge of settlement business incubator hub. According to the promoter, the site owners have a track record in delivering creative and start-up business space.	The proposed incubator hub would require an operator in place or external funding to facilitate the development because as a standalone development it will be unviable. KSP is not located in the golden triangle of west London / Cambridge / Oxford or has a direct link to a university therefore, there are better placed parks to attract an operator and/or funding. Furthermore, despite the government's keenness to see growth in life science sector, there are doubts whether the UK will remain part of the EU Horizon programme and the funding this brings for research and innovation programme. Therefore, the site is not suited for the development proposals unless there is a known commitment for such as facility.	No	No				No	
SBC17/005	Land at Pheasant Farm (west), Howt Green, Sittingbourne	Poor, screened from the adjacent A249, and only visible from access road (Sheppey Way).	Office and open storage to the south, agriculture to the north, the A249 to the east and car breakers yard to the west.	Nothing in immediate vicinity	No	M2 J5 6.5kms. A249 J 2kms via Sheppey Way and Iwade or Bobbing.	Sheppey Way - need to pass through villages to link with the A249.	No	1	Not for employment uses.	Generally sites around Sittingbourne are attractive to industrial/warehouse uses, but this site is isolated and we have already seen the neighbouring (Flo Plast) relocate to a dedicated industrial estate. The size of the site means that it could only accommodate small units which would require a pre-let/sale in place to facilitate viable development, and these type of occupiers are unlikely to make such a commitment.	Possible	Possible	Good market area	Small scale. Not established location.	Possible	Possible	1.6

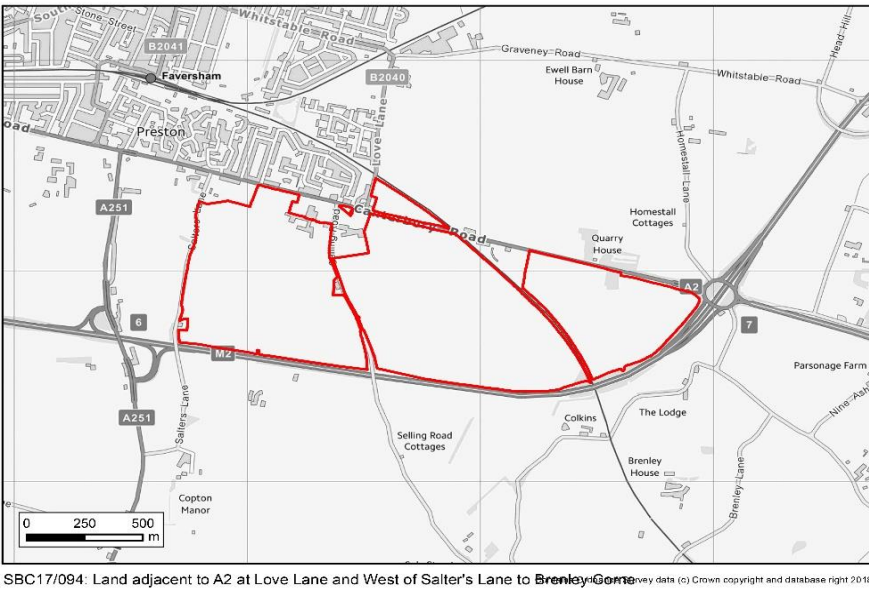



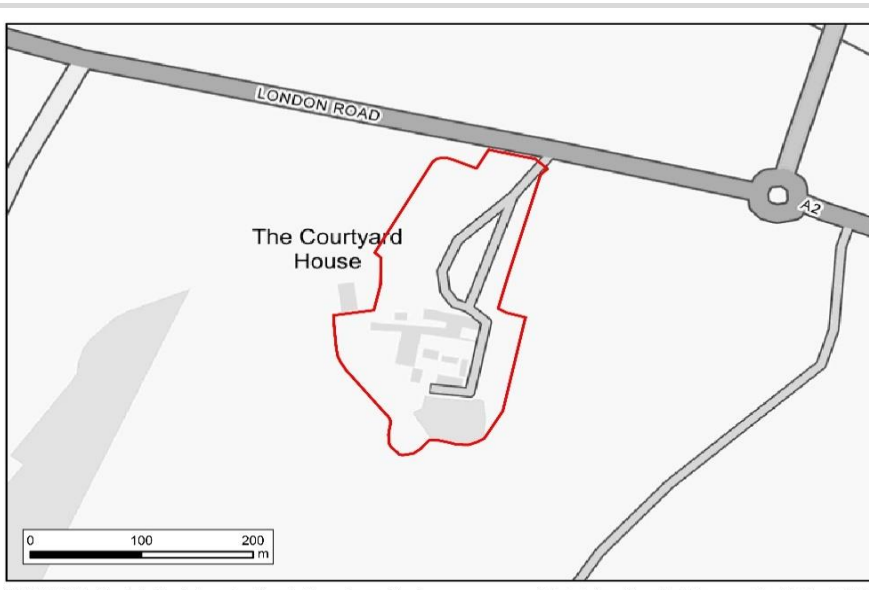

SITES POTENTIALLY SUITABLE FOR EMPLOYMENT USES

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16
BASIC INFORMATION													CONSTRAINTS		
CfS ID.	Name	Site location map	Market Area	Site description	Current use	Is the site previously developed land?	Area (ha)	Sequential location	Proposed principle use	Principle land use (office/indl)	Planning designations	Planning History	(inc. physical and policy)	Overall constraints?	Is this site available?
SBC17/092	Land at Sittingbourne Golf Centre, Church Road, Tonge		Sittingbourne	White land - currently used as a golf course.	Golf course	No	5.8	Adjacent to the built up area	B2-B8	Industrial	This area is beyond Sittingbourne's built-up area boundary, and the Local Plan (pol ST3) considers such areas to be located in open countryside, where the primary objective is protection from isolated and/or large scales of development. Site is within Kent Minerals Safeguarded Areas (Brickearth and River Terrace). Immediately to the north is SPA and AHLV.	Majority of site. 18/502181/FULL - Refurbishment of driving range and additional facilities. Awaiting decision.	The site does not have a specific landscape designation, but forms part of the buffer between the SPA and AHLV to the north, and development to the south (such areas are protected by ST3), with the northern part of the development area to provide strategic open space to extend the buffer.	Major	Not available in the plan period
SBC17/008	Land fronting east side Bobbing Hill, Sheppey Way, Bobbing		Sittingbourne	Small narrow site with long road frontage on Sheppey Way, within the Bobbing Important Local Countryside Gaps policy.	agricultural	No	1.0	Adjacent to the built up area	Light Industrial (B1c)	Industrial	The site is within a designated Important Local Countryside Gaps (DM25). This area is beyond any built-up area boundary, and the Local Plan (pol ST3) considers such areas to be located in open countryside, where the primary objective is protection from isolated and/or large scales of development. Also within a Kent Minerals safeguarded area (Brickearth).	No recent planning history (5 years)	Within the Important Local Countryside Gaps area.	Minor	Immediately available
SBC17/049	Land at South West Sittingbourne (Land At Wises Lane, Borden)		Sittingbourne	Agricultural land taking in the MU3 site, but expanded to the west towards the A249. The area to the west may provide opportunity for a road link to the A249.	Agricultural	No	51.4	Adjacent to the built up area	Other	Industrial	Western half of the site is within Important Local Countryside Gaps (DM25) area, and where ST3 will apply. The eastern section within the built up area boundary. The majority of the site is a proposed mixed use allocation (ST4) and Kent Minerals Safeguarded Area (Brickearth).	17/505711/HYBRID - Hybrid application for outline permission 595 dwellings and commercial units and 80 dwellings for full planning permission for entire site. No B class uses proposed. Allowed on appeal 2021.	Local landscape designations on the western side.	Minor	Not available in the plan period
REG19 71	Land East of Church Road		Sittingbourne	A small area of scrub land on the east of Church Road within the existing Eurolink Industrial Estate next to the speedway stadium.	Open scrub land	No	0.2	Within the built up area	B2, B8 and Class E	Industrial	Within Eurolink - a designated Existing Strategic Employment Location. Within a mineral safeguarding area for brickearth within the adopted Kent County Council Minerals and Waste Local Plan.	No known relevant planning history.	The site's small size limits the possibilities, but otherwise it is unconstrained.	Minor	Available Immediately
CFS34	Land adj. Kemsley Substation, ME10 2FE		Sittingbourne	This is expansion land surrounding an existing substation that the owner now considers to be surplus. The site neighbours employment uses to the north and has easy access to the A249. The site is of an irregular shape.	Redundant expansion land surrounding an existing substation	No	10.2	Within the built up area	B class uses	Industrial	Partly within a Kent Minerals and Waste Local Plan safeguarded Area - Brickearth Swale Areas	No known relevant planning history.	There are pylons/cables/pipelines located at the site relating to the substation use. There is also possible contamination. Although the site is well located to surrounding employment uses with good access to the A249, the site configuration (wrapped around the substation) will be a limitation.	Minor	Available in 1-5 years according to the site promoter
CFS50	Land East of Faversham expansion		Faversham	<p>Agricultural land to the east of Faversham.</p> <p>A strategic scale site that is promoted to deliver 21 ha of employment uses on land north of the A2/M2/A299 junction. Previously the western-most rectangular plot (43 ha) was promoted (SBC17/105).</p> <p>Immediately east of the recently part-developed at Lady Dane Farm, and more expansive to the east than the MU1 (East of Faversham Expansion) albeit not including the Duchy site south of Canterbury Road (see separate entry for the Duchy land).</p> <p>Immediately to the north is the Land at Graveney Road) employment allocation (A6) for 7,000 sq m of B class floorspace.</p>	Agricultural	No	127.0	Outside the built up area	Residential	Employment	<p>This area is beyond Faversham's built-up area boundary, and the Local Plan (pol ST3) considers such areas to be located in open countryside, where the primary objective is protection from isolated and/or large scales of development.</p> <p>No landscape designations specific to the site, but in relatively close proximity to the south and east are the Swale Level Area of High Landscape Value and the Kent Downs AONB.</p> <p>The site falls within a mineral safeguarding area for brickearth within the adopted KCC Minerals and Waste Local Plan.</p>	<p>The central area immediately north of the A2, was promoted through the Reg19 Plan for 10 ha of employment uses.</p> <p>No known relevant planning application history.</p> <p>Previously promoted (ref: SBC17/105)</p>	The site is located within open countryside, with a predominately flat open landscape and large buildings could impact on the setting of both of the nearby landscape designation areas.	Major	According to the promoter, the site is available within 1-5 years

SITES POTENTIALLY SUITABLE FOR EMPLOYMENT USES

BASIC INFORMATION		17	18	19	20	21	22	23	24	25	26	27	28			30	29	
		ATTRACTIVENESS TO OCCUPIERS			Internal environment		Local access by road		Public transport access		REVIEW /		RECOMMENDATION					
CfS ID.	Name	Prominence of site	Compatibility of surrounding uses	Access to amenities	Any problems with shape, gradient, boundary etc.?	Proximity to Mway / principal roads (M2/A249/A299) [kms]	Quality of access to the principal road network	Is the site close to a railway station (within 400m)?	Station name & number of bus stops	Evidence of developer / occupier interest?	Other market intelligence	Is the site likely to be attractive to employment occupiers?	Is the site suitable for employment use?	Positives	Constraints	Prospect	Consider for employment allocation in the next plan	Potential employment area (Ha)
SBC17/092	Land at Sittingbourne Golf Centre, Church Road, Tonge	The site is not located on part of the SRN, and has low prominence.	Largely open countryside with listed farm buildings immediately to the south.	Generally poor - very limited provision in Murston (2 kms). Sittingbourne town centre 2.7 kms.	None	J5 M2 11km, via A249 (via Swale Way) 4km. A longer distance than via the A2, but a better quality / appropriate route.	Will need spur onto Swale Way, which with the A249 is a route suitable for heavy goods vehicles.	No	0	Unknown	Currently has poor access, but should the new northern link road be completed it would unlock the site and be attractive to occupiers. Its proximity, close to Eurolink - established employment location -would be attractive to industrial/warehouse occupiers and developers.	Yes	No				No	
SBC17/008	Land fronting east side Bobbing Hill, Sittingbourne	Landscape screened from the A249, but with good road frontage on Sheppey Way, now a minor road.	the site is surrounded by transport infrastructure, so no compatibility issues.	Foodstore and other limited provision in Bobbing. Sittingbourne town centre 2.6 kms.	No, other than relatively narrow and small.	J5 M2 4.5 km, via Sheppey Way and A249.	Good, via Sheppey Way and A249.	No	1	Being actively promoted.	The size of the site size means that it could only accommodate small units which would require a pre-let/sale in place to facilitate viable development, and these type of occupiers are unlikely to make such a commitment.	Yes	Possible	Good market area	Small scale. Not established location.	Possible	Possible	1.0
SBC17/049	Land at South West Sittingbourne (Land At Wises Lane, Borden)	Prominent location adjacent to a junction on the A249.	the western end is close to an electricity sub-station and bounded by the A249 road infrastructure. No compatibility issues.	Limited provision on London Road 2 kms, Sittingbourne 2.5 kms.	None	J5 M2 4.4 kms via Wises Lane, Chestnut Street and A249.	Wises Lane and Chestnut Street are single carriageway and not heavily used. Indeed it is currently used for day time parking. Would need parking restrictions for the site to come forward.	No	0	Unknown	Location south of Sittingbourne at a junction of the A249. Would be attractive to industrial/warehouse occupiers. Would need clear separation from residential as part of the mixed use scheme to avoided negative operational impacts. Site benefits from a residential-led permission.	Yes	Yes	Good market area	Residential permission means employment likely to be ruled out.	Unlikely	Possible	10.0
REG1971	Land East of Church Road	Good - within Eurolink	Within Eurolink therefore no incompatibility issues.	1.4 km from Sittingbourne Town Centre	None other than scale	0.2 km from B2005	Good access to the A2/A249 via Castle Road, Eurolink Way and B2006.	No	7	Being actively promoted through Reg 18 representations for 1,000 sqm of additional B2, B8 and Class E uses	Site location is good for industrial/warehouse uses but site size will limit the market opportunity.	Yes	Yes				No	1,000 sqm
CFS34	Land adj. Kemsley Substation, ME10 2FE	High	No incompatible uses. sub-station and adjacent employment uses.	The site is 2.8 km from Sittingbourne Town Centre	Pylons on northern part of site /cables/ Reps refer to 'pipelines' (unspecified what and location).	The site has excellent access to the A249 via Swale Way	The site is located on the B2005 (Swale Way) with excellent access to the A249.	No	13	Being actively promoted. Owner National Grid confirms site is surplus.	Site is attractive for industrial/warehouse uses given the compatible surrounding uses and good links to the A249. The market is currently tight and demand is strong, therefore good possibility that the site would be developed.	Yes	Yes	Strong market area	Questionable how much of ~5 ha site available. Site would wrap around electricity substation	Possible	Possible	5
CFS50	Land East of Faversham expansion	High - on the A299 and M2, would be visually prominent.	New residential on the MU6 site, otherwise agricultural uses.	2.9 km from Faversham Town Centre	None, other than the land rises to the open countryside to the east.	Direct junction access to the A299/ M2 junction 7 at the eastern edge of the site. Questions over the capacity of J7 to accommodate growth on this scale.	The site is located on the A299/M2 junction. Currently accessed by a narrow rural lane (Homestall Lane).	No	14	Call for sites representation states promoted by four land owners/developers, and proposals include 21 ha of employment uses north of the A299/M2 junction. The site is one of the better sites for industrial/warehouse uses, although Faversham is comparatively less attractive in market terms than sites to the west of Borough. But the industrial/warehouse market is tight with low levels of vacancy and strong level of demand and this site would have good access links to the M2/A299 and prominence, making it attractive to occupiers. The site has locational advantages over some of the larger industrial locations elsewhere in Faversham that generate HGV flows within the urban area. The site would not be suitable for office use as occupiers prefer to be located in the town centre to access public transport and amenities or business parks with amenities, furthermore office demand is weak and what requirements exist are for small units - these units would have to be speculatively built to attract occupiers and it's unviable to do so.	The site is one of the better sites for industrial/warehouse uses, although Faversham is comparatively less attractive in market terms than sites to the west of Borough. But the industrial/warehouse market is tight with low levels of vacancy and strong level of demand and this site would have good access links to the M2/A299 and prominence, making it attractive to occupiers. The site has locational advantages over some of the larger industrial locations elsewhere in Faversham that generate HGV flows within the urban area. The site would not be suitable for office use as occupiers prefer to be located in the town centre to access public transport and amenities or business parks with amenities, furthermore office demand is weak and what requirements exist are for small units - these units would have to be speculatively built to attract occupiers and it's unviable to do so.	Yes	Yes	Large site Likely to be market attractive	Landscape constraints will limit possible scale. Brenley Corner junction issues.	Possible	Yes	21


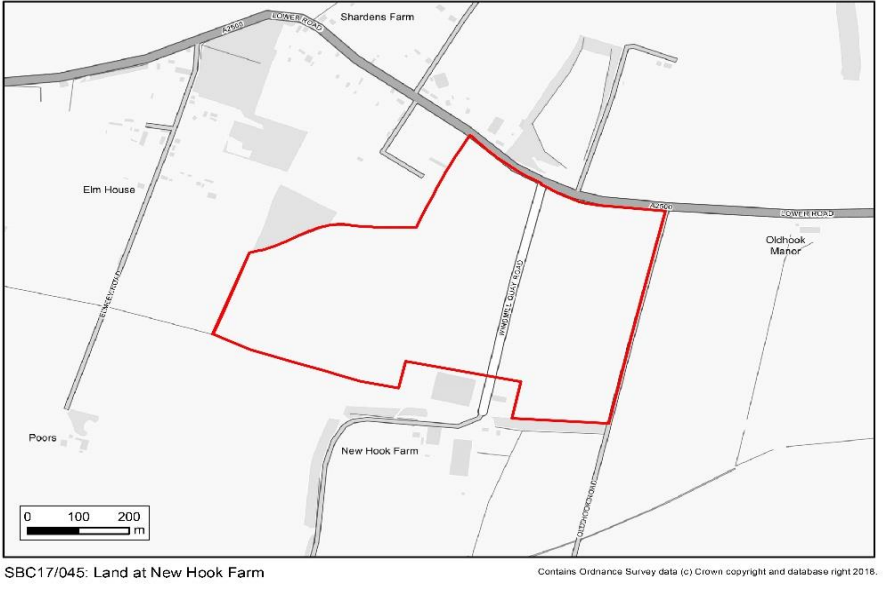
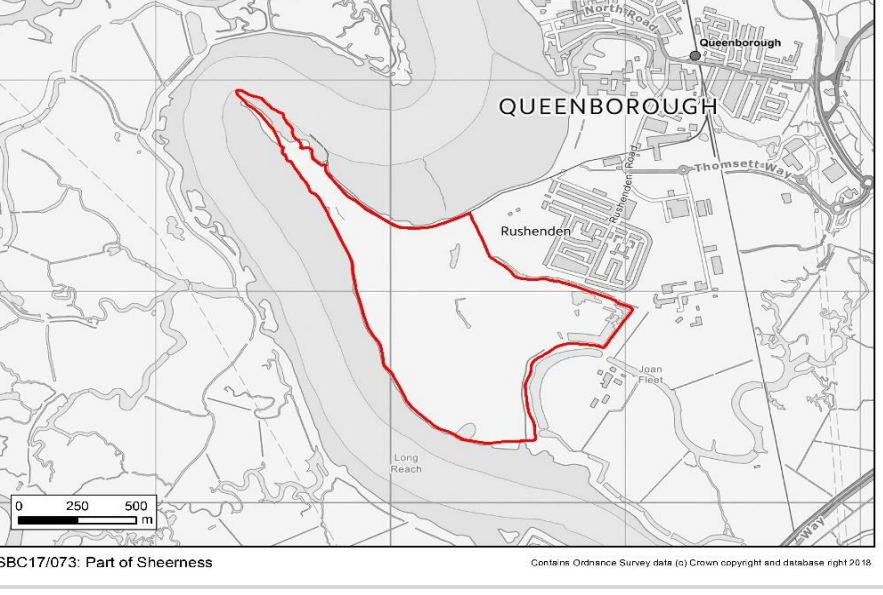
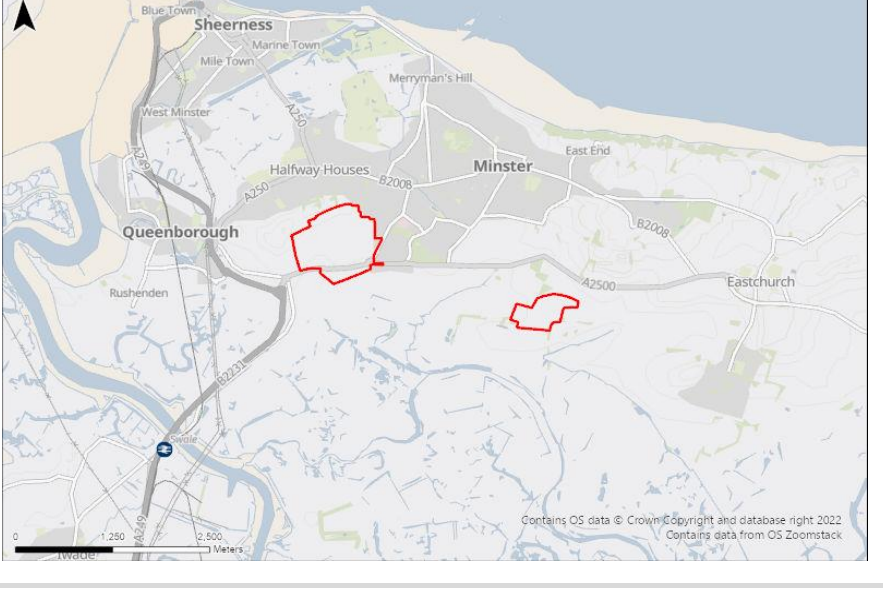

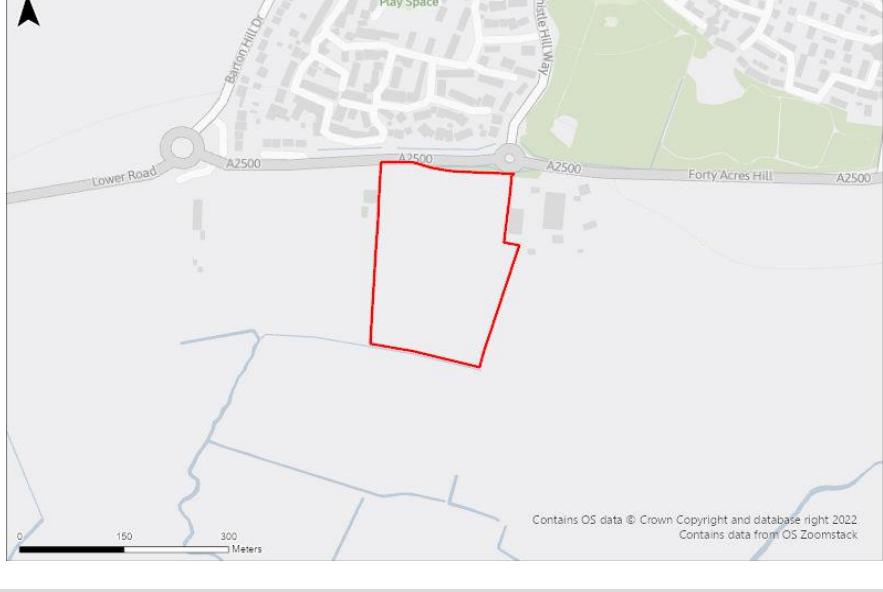
SITES POTENTIALLY SUITABLE FOR EMPLOYMENT USES

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16
BASIC INFORMATION													CONSTRAINTS		
CfS ID.	Name	Site location map	Market Area	Site description	Current use	Is the site previously developed land?	Area (ha)	Sequential location	Proposed principle use	Principle land use (office/indl)	Planning designations	Planning History	(inc. physical and policy)	Overall constraints?	Is this site available?
SBC17/094	Land adj to A2 at Love Lane and west of Salter's Lane to Brenley Corner (the Duchy site)		Faversham	Agricultural land between the A2 and M2, wrapping around the A5 allocation (land at Selling Rd).	agricultural	No	131.0	Outside the built up area	B class uses	Industrial	<p>This area is beyond Faversham's built-up area boundary, and the Local Plan (pol ST3) considers such areas to be located in open countryside, where the primary objective is protection from isolated and/or large scales of development.</p> <p>Immediately to the south, beyond the M2 is the Kent Downs AONB and to the east the Swale Level AHLV.</p> <p>There are no other landscape designations on the site, other than the Kent Minerals Safeguarded Area (Brickearth), which largely covers the site.</p>	<p>No recent planning applications.</p> <p>A masterplan for an urban extension of 2,500 homes and 2,500 jobs was published in Oct 2021.</p> <p>The site was included in the 2021 Reg 19 Plan to provide a variety of employment space to support 2,500 jobs. The main concentration of employment activity is identified for land between Brenley Corner (M2 J7) and the railway line south of the A2</p>	<p>Current policy ST3.</p> <p>In close proximity to the Kent Downs AONB to the south, and in relatively close proximity to the Swale Level Area of High Landscape Value to the east.</p> <p>The railway bisects the site.</p>	Major	Not known
CFS33	Corner Cottage, Canterbury Road, Faversham		Faversham	Land occupied by a single detached dwelling that is within the parcel of agricultural land north of the A2 and bounded to the north by the railway line.	Residential	Yes	0.2	Adjacent to the built up area	Residential	None	<p>The site falls within a mineral safeguarding area for brickearth within the adopted Kent County Council Minerals and Waste Local Plan.</p> <p>To the north of the site is the mixed-use allocation (ST4, Land at Lady Dane Farm).</p>	<p>No known relevant planning history.</p>	<p>The site falls within a mineral safeguarding area for brickearth within the adopted Kent County Council Minerals and Waste Local Plan.</p> <p>Otherwise unconstrained.</p>	Minor	According to the promoter, the site is available within 1-5 years
LPR2401	Land at Brogdale, Ospringe		Faversham	<p>Agricultural land located adjacent to Brogdale Farm buildings. Some of the farm buildings are currently used for business purposes - Brogdale Enterprise Suite (office space) and a brewery.</p> <p>The site is located to the east of Brogdale Road, just south of the M2 motorway.</p>	Agricultural	Yes	2.3	Outside the built up area	Mixed use	Industrial	<p>The site is located within an Area of High Landscape Value (AHLV)</p> <p>There is also a Grade II listed property adjacent to the main farm complex</p>	<p>A mixed-use application comprising a nursery school, holiday accommodation and flexible agricultural, rural workshop and business units is currently pending (LPA Reference. 20/505877/OUT).</p>	<p>Located within an Area of High Landscape Value, and therefore subject to DM24.</p> <p>Promoter representations refer to a population of common lizard on the site.</p> <p>Grade II listed property adjacent to the main farm complex.</p>	Medium	Immediately Available
SBC17/032	Monkshill Farm, Monkshill Road, Faversham		Faversham	Farmland in very rural location, isolated, poor road access, but close to Waterham Business Park. The farm is currently occupied by a co-working business, FarmWorkPlay.	agricultural	No	26.7	Outside the built up area	B class uses	Industrial	<p>Northern half of the site is within Local Designated Site of Biodiversity (DM28). This area is beyond any built-up area boundary, and the Local Plan (pol ST3) considers such areas to be located in open countryside, where the primary objective is protection from isolated and/or large scales of development. Although outside of the site, directly to the north is 'International and national designated site of biodiversity or geological value (DM28)' and 'Areas of High Landscape Value' and Kent Minerals River Terrace'.</p>	<p>Prior notifications submitted for change of use to nursery. Granted. Monkshill Farm 16/507694/PNT</p>	<p>Landscape designations on and immediately off site. The rural isolation and poor access arrangements are major constraints.</p>	Major	Immediately available
SBC17/033	Syndale Park, London Road, Faversham		Faversham	Isolated hotel complex (in operation) in designated Area of High Landscape Value.	Hotel/ leisure. Most of the site is open parkland.	No	3.5	Outside the built up area	B1	Office	<p>Site is within the Syndale Conservation Area and an 'Area of High Landscape Value', and is considered likely to contain heritage assets connected to a Roman Fort and the Roman Watling Street. It lies beyond Faversham's built-up area boundary, and the Local Plan (pol ST3) considers such areas to be located in open countryside, where the primary objective is protection from isolated and/or large scales of development.</p>	<p>No relevant planning applications</p>	<p>The Conservation Area and AHLV designation are major constraints on intensification of use.</p>	Major	Not known
SBC17/097	Byssing Wood Road, Faversham		Faversham	Within an AHLV and LDS of Biodiversity. Includes the Brett Aggregates offices. Immediately to the north and west is the Oare Gunpowderworks country park, which is a scheduled Ancient Monument.	Park land	No	2.8	Outside the built up area	B class uses	Industrial	<p>Site is within 'Area of High Landscape Value (DM24)' and 'Local Designated site of biodiversity (DM28) and Kent Minerals Safeguarded Area (Brickearth). This area is beyond Sittingbourne's built-up area boundary, and the Local Plan (pol ST3) considers such areas to be located in open countryside, where the primary objective is protection from isolated and/or large scales of development. The north western half is within a 'Scheduled Monument' (DM34) and Kent Minerals Safeguarded Area (River Terrace).</p>	<p>No recent planning history (5 years)</p>	<p>Local nature and landscape designations are major constraints.</p>	Major	Not available in the plan period

SITES POTENTIALLY SUITABLE FOR EMPLOYMENT USES

BASIC INFORMATION		17	18	19	20	21	22	23	24	25	26	27	28				30	29
		ATTRACTIVENESS TO OCCUPIERS				Internal environment	Strategic accessibility	Local access by road	Public transport access			Market Signals		RECOMMENDATION				
CIS ID.	Name	Prominence of site	Compatibility of surrounding uses	Access to amenities	Any problems with shape, gradient, boundary etc.?	Proximity to Mway / principal roads (M2/A249/A299) [kms]	Quality of access to the principal road network	Is the site close to a railway station (within 400m)?	Station name & number of bus stops	Evidence of developer / occupier interest?	Other market intelligence	Is the site likely to be attractive to employment occupiers?	Is the site suitable for employment use?	Positives	Constraints	Prospect	Consider for employment allocation in the next plan	Potential employment area (Ha)
SBC17/094	Land adj to A2 at Love Lane and west of Salter's Lane to Brenley Corner (the Duchy site)	The site has potentially high prominence set between the M2 and A2.	Compatibility would be good - site is largely contained within the highway network with residential area on the edge of Faversham to the north.	Faversham town centre 2.7 kms.	Bisected by the railway line, otherwise no known issues.	Potential direct access to Js 6&7 M2.	The route to both junctions (Canterbury Rd and A251 and London Rd) are generally good.	No	3	Being actively promoted	The industrial/warehouse market is generally tight with low levels of vacancy and strong level of demand. Although Faversham is comparatively less attractive for industrial/warehouse uses in market terms compared to sites in the west of Borough, this site is likely to be attractive to occupiers and the developer market because it has a number of competitive advantages. Very good links to the M2/A299, high prominence from the highway network and it is large, offering the prospect of space for larger scale provision.	Yes	Yes	Large site Likely to be market attractive	Landscape constraints will limit possible scale. Brenley Corner junction issues.	Possible	Possible	20
CFS33	Corner Cottage, Canterbury Road, Faversham	Medium - frontage to A2	Possible issues with residential to the west.	0.1 km (opposite) Macknade Cluster	Site configuration in terms of size is a constraint	1 km to M2 junctions 6/7 via A2 and A251.	The A2 (Canterbury/London Road) is accessed via Love Lane.	No	6	Duchy owned site being actively promoted for residential as part of the mixed use development of Land at South East Faversham .	The site could be suitable for industrial/warehouse uses although Faversham is comparatively less attractive in market terms than sites to the west of borough. But the industrial/warehouse market is tight with low levels of vacancy and strong level of demand. The site good links to the M2/A299 and prominence would make it attractive to occupiers. But it's very small size means as a standalone development it is unlikely to be viable on a speculative basis, it would be better suited to be brought forward as part of the much larger land parcel immediately to the east.	Possible	Possible		Scale	Good	No	0.2
LPR2401	Land at Brogdale, Ospringe	Medium - Visible along the A2 but set back.	Issues with proximity to open countryside to the south and listed farm buildings	1.5km from Faversham Town Centre	None	Although the site is located immediately south and adjacent to the M2, junction 6 access in either direction is approx. 3 kms via routes involving rural lanes.	Brodgale Road, a rural lane links the site with the A251 and A2 and then on to the M2.	No	0	Being actively promoted for an extension to the existing employment site	Site would only be suitable to capture demand from existing or local occupiers. Speculative development would be unviable so would require commitment from an occupier to facilitate viable development.	Yes	Yes				No	
SBC17/032	Monkshill Farm, Monkshill Road, Faversham	Very low, due to rural location and poor access.	Surrounded by farmland used for various forms of agricultural husbandry notably large scale glass houses.	Limited provision on A299 services. Faversham 10 kms.	No	M2 J7 6.5kms viaA299.	A299 is excellent, but Monkshill Road and HighStreet Rd are rural lanes.	No	0	Unknown	Not an established employment location. It has neither good access nor is it located close to amenities. This would not be attractive to occupiers or developers in the general market and would only be suitable for expansion of the existing facility.	No	No				No	
SBC17/033	Syndale Park, London Road, Faversham	Site is on the A2, so has prominence, but the buildings are towards the rear of the site and have no visual prominence.	Surrounded by parkland / pastures.	Faversham town centre 2.2 kms.	No	J6 M2 3 kms via A2/A251	A2/A251 provide good access.	No	0	Not for employment, but has been submitted for SHLAA consideration as a Mixed Use area.	Outside town boundary of Faversham. Not in close proximity to amenities and public transport, both of which occupiers seek in the current market. Unlikely to be attractive to occupiers or developers, and development would be likely to be unviable.	No	No				No	
SBC17/097	Bysing Wood Road, Faversham	Some frontage on the Western Link, but site screened from the road.	Opposite Oare Rd industrial estate, but immediate neighbouring uses are leisure related - country park to the north.	Foodstore opposite, and town centre 1.8kms.	Irregular shape.	J6 M2 4kms (via Western Link, London Road and A251).	Good immediate access to Western Link from Bysing Wood Road.	No	4	Unknown	Although with direct access onto the Western Link road, the site is remote from the core industrial/warehouse area of Faversham, and not as attractive as those sites which have direct access onto the A249/M2.	Possible	No				Yes	2.8

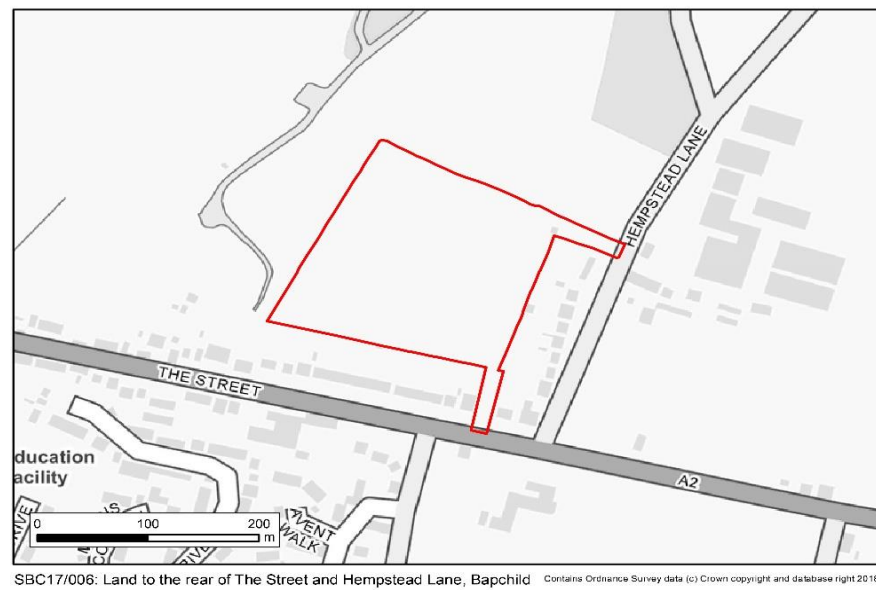
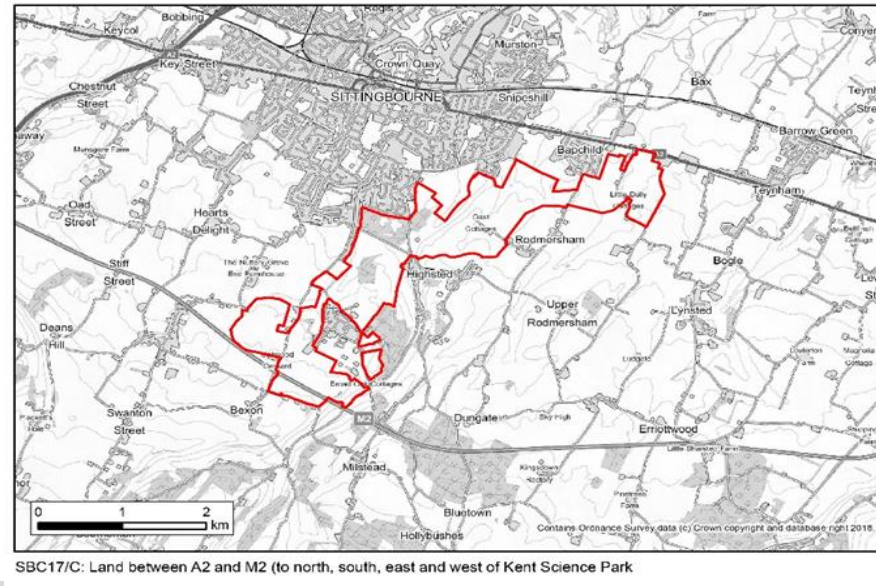
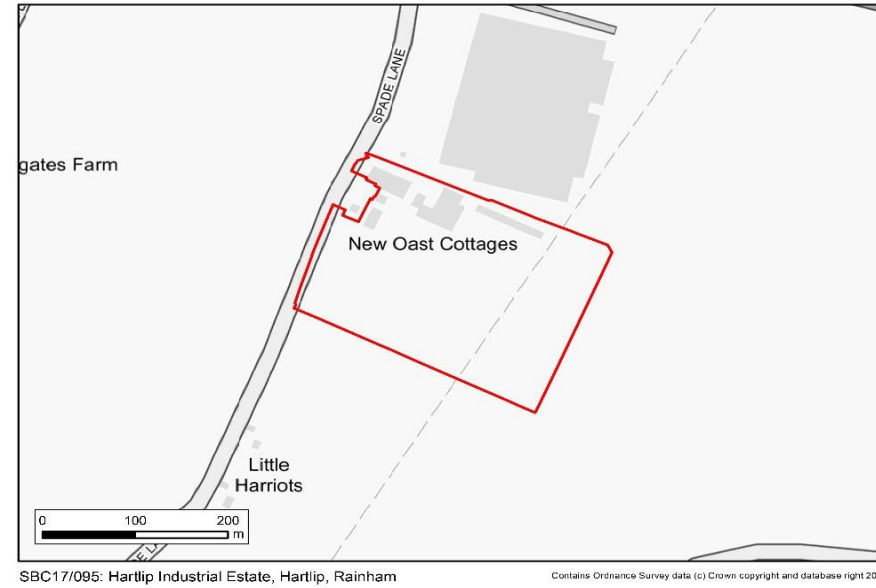
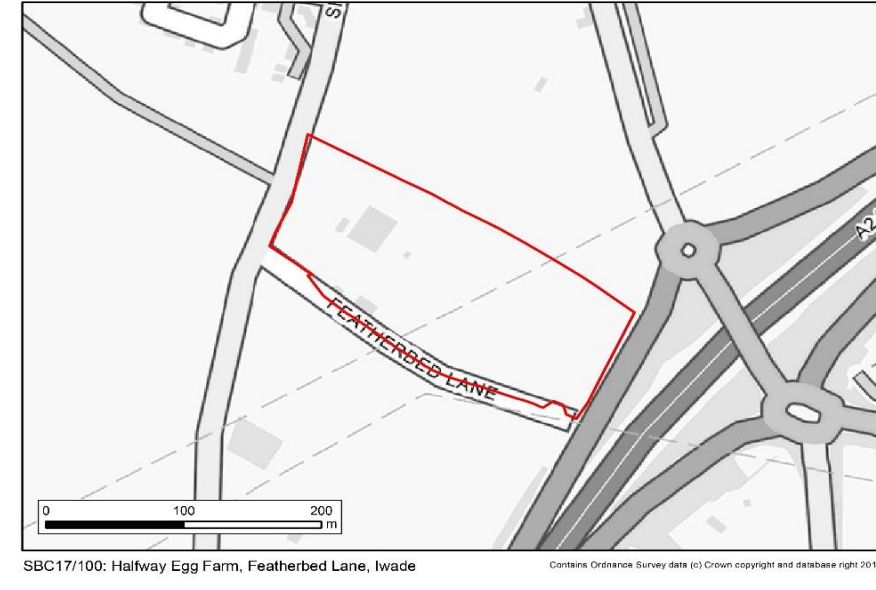
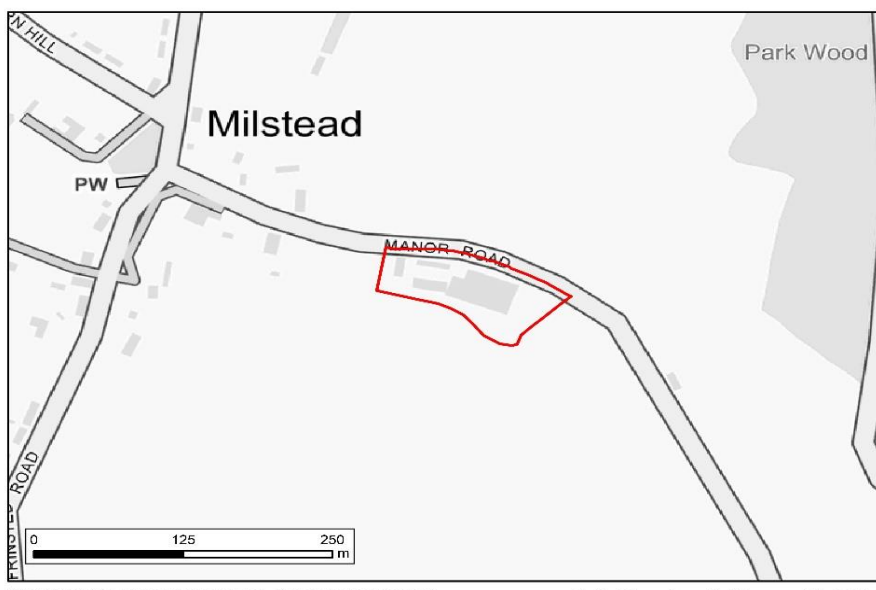
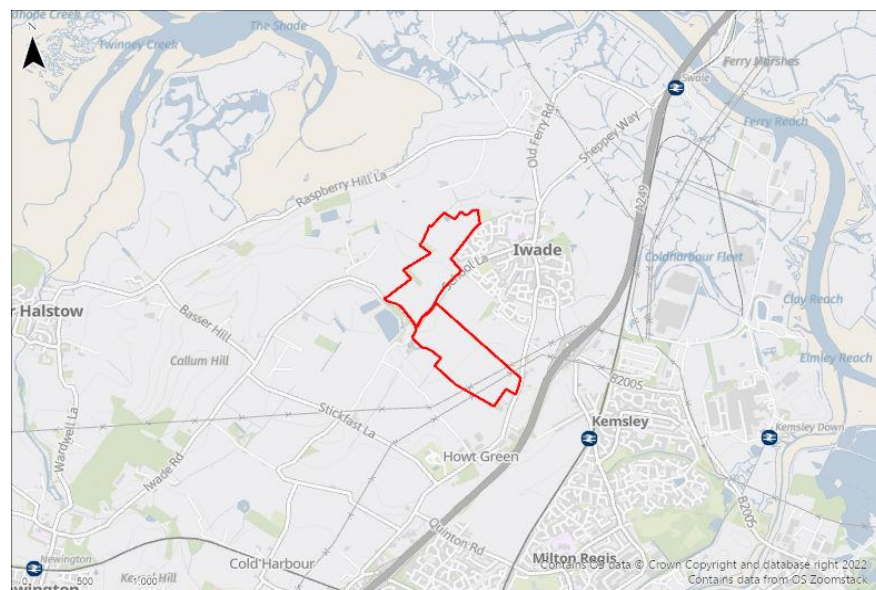
SITES POTENTIALLY SUITABLE FOR EMPLOYMENT USES

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16
BASIC INFORMATION													CONSTRAINTS		
CfS ID.	Name	Site location map	Market Area	Site description	Current use	Is the site previously developed land?	Area (ha)	Sequential location	Proposed principle use	Principle land use (office/indl)	Planning designations	Planning History	(inc. physical and policy)	Overall constraints?	Is this site available?
CFS47	Land south of Cowstead Farm, Queenborough Road		Sheerness	Agricultural land on the other side of the A249 from the Neats Court employment and retail area.	Agricultural	No	3.7	Outside the built up area	Promoted for retail, but potentially suitable for employment	Industrial	The site is located on the edge of an Area of High Landscape Value and a Coastal Change Management area. Directly north of a Kent Minerals and Waste Plan Safeguarded Area - River Terrace designation. To the west, on the other side of the A249 is the employment allocation ST4 (Land at Cowstead Corner, Queenborough) which is allocated for 5,600sqm of industrial/office space.	No known relevant planning history.	Partially within (southern tip) a Landscape Character Area under Policy DM24. Partially within Flood Zone 2 and 3 and a coastal change management area, Policy DM23 (Coastal Change Management) is therefore engaged.	Minor	According to the promoter, the site is available within 1-5 years
SBC17/045	Land at New Hook Farm, Minster, Isle of Sheppey		Sheerness	White land (farm land) in an isolated rural location, away from areas of employment and with poor road links to strategic network.	agricultural	No	31.2	Outside the built up area	B class uses	Industrial	No designations, but this area is beyond Minster's built-up area boundary, and the Local Plan (pol ST3) considers such areas to be located in open countryside, where the primary objective is protection from isolated and/or large scales of development.	Directly north of New Hook Farm, within the southern section of the site - 16/507943/FULL for the construction of an agricultural anaerobic digestion plant. Granted Feb 2018.	Site would need a policy change to include it within the settlement boundary, and is a relatively remote site.	Major	Not available in the plan period
SBC17/073	Port of Sheerness, Rushenden Marshes, Rushenden Road		Sheerness	Rushenden Marshes are on the banks of The Swale and within the Kent Level AHLV.	marshland	No	80.3	Outside the built up area	Storage and Distribution (B8)	Industrial	Whole site is designated 'Areas of High Landscape Value (DM24)' and Coastal Change Management Area (DM23). Whole area is within FZ2. Site is adjacent to Medway Estuary/Marshes SSSI, SPA and RAMSAR area. This area is beyond any built-up area boundary, and the Local Plan (pol ST3) considers such areas to be located in open countryside, where the primary objective is protection from isolated and/or large scales of development. It is within Kent Minerals safeguarded area (River Terrace).	Covers majority of the site. 15/506869/COUNTY - EIA Screening opinion for proposed aggregate recycling facility	The landscape designations restrict the nature of any potential use that might come forward.	Major	Not available in the plan period
REG2700	Land at South-West Minster		Rural west	This is a large site of 106ha which currently comprises open arable farmland.	Agricultural	No	106.0	Outside the built up area	Residential	None	Allocated site (A12) in the adopted Local Plan - Land west of Barton Hill Drive, Lower Road, Minster There is a listed building (Parsonage Farm), north of the northeast corner of the site boundary.	Outline planning permission for a development of up to 700 homes (18/503135/OUT) and no employment provision.	The site is highly visible due to its sloping landform and open countryside location to the south-west of Minster, making it challenging for large format buildings for employment use. Furthermore, the northern and eastern boundaries of the site are located in close proximity to existing residential properties.		Immediately available
REG3044 (R10)	Newington Industrial Estate - southern expansion		Rural west	A small well occupied industrial estate providing mostly open storage for building materials and materials recovery located just south of the A2.	agricultural	No	3.3	Outside the built up area	Storage and Distribution (B8)	Industrial	Reg18 submission (REG3044) seeks B class employment uses greenfield expansion on land immediately south of the existing Estate. The promoter states that development of this land would complement the existing uses and meet pent up local demand. Promoter estimates site could support 8,800 sq m of B1/B2 and B8.	No known relevant planning history.	Some residential immediately to the north. Partly within the Kent Minerals safeguarded area. Possible highway issues on to the A2.	Minor	Immediately available
REG3197	Land at Marshlands Farm, Lower Road, Minster		Rural west	Greenfield south east of Minster-on-Sea with employment uses, including a (plastics, car dealership and repair shop on the eastern edge of the site. Bounded by sports pitches to the west.	Agriculture	No	5.6	Outside the built up area	Mix of B uses	Industrial	Not within areas of landscape value, but beyond Minster's built-up area boundary, and the Local Plan (pol ST3) considers such areas to be located in open countryside, where the primary objective is protection from isolated and/or large scales of development. To the south east, a small part of the site is within an area of Kent Minerals Safeguarded Area (River Terrace). Unusually for the Isle, there is no flood risk. Land immediately to the south is AHLV and Coastal Change Management and washed over by FZ3.	No known relevant planning history. Previously promoted (ref: SBC17/036)	Located in open countryside and outside the settlement boundary, with farmland to the south towards the Elmley National Nature Reserve. North of the site (beyond the A2500) is residential.	Major	Not known

SITES POTENTIALLY SUITABLE FOR EMPLOYMENT USES

BASIC INFORMATION		17	18	19	20	21	22	23	24	25	26	27	28			30	29	
		ATTRACTIVENESS TO OCCUPIERS				Internal environment	Strategic accessibility	Local access by road	Public transport access			REVIEW	RECOMMENDATION					
CFS ID.	Name	Prominence of site	Compatibility of surrounding uses	Access to amenities	Any problems with shape, gradient, boundary etc.?	Proximity to Mway / principal roads (M2/A249/A299) [kms]	Quality of access to the principal road network	Is the site close to a railway station (within 400m)?	Station name & number of bus stops	Evidence of developer / occupier interest?	Other market intelligence	Is the site likely to be attractive to employment occupiers?	Is the site suitable for employment use?	Positives	Constraints	Prospect	Consider for employment allocation in the next plan	Potential employment area (Ha)
CFS47	Land south of Cowstead Farm, Queenborough Road	High - on the A249	No incompatibility issues.	The site is located 0.8km from Neats Court	Site configuration - narrowness - is a possible constraint	The site is located adjacent to A249.	The site has junction access north and south to the A249 and A2500.	No	4	Being actively promoted for circa. 10,000 sq m of flexible retail and commercial floorspace.	Site would be attractive to industrial/warehouse occupiers, albeit the market is weaker here compared to Sittingbourne. But the market is currently tight and demand is strong for these industrial/warehouse uses. The site layout means that development density may not be optimised and may compromise viable development.	Yes	Yes	Strong market area	Small scale only due to limited site area	Good	Yes	3.7
SBC17/045	Land at New Hook Farm, Minster, Isle of Sheppey	Low, due to remote location.	Surrounded by agricultural uses, that are compatible with employment uses.	Some limited provision in Minster 4 kms, Sheerness town centre 8 kms.	No	J5 M2 17.5 kms via A249	Good via the A2500 first and then A249.	No	1	Unknown	The site is remote and not near an established employment location, and while access is reasonable the remoteness means it is unlikely to be attractive to occupiers. Though there is pent up demand for industrial/warehouse use in the Borough, with a preference to be around Sittingbourne, occupiers still require locations with amenities and close proximity to the strategic road network.	No	No				No	
SBC17/073	Port of Sheerness, Rushenden Marshes, Rushenden Road	Highly prominent from the water and from the A249 because of the flat open terrain.	Mostly marshland, sewage works and Rushenden village to the north.	Superstore and leisure facilities and Queenborough 2 kms.	Site is marshland.	J5 M2 15kms (via Thomsett Road and local route through Rushenden).	A new route would be required to avoid Rushenden village. Thomsett Way provides direct access within 2 km to the A249.	No	0	Being actively promoted.	One of the options being considered by the port for expansion. The port is at capacity, and the site would be developed and occupied if developed.	Yes	Yes				No	Specialist port related land use.
REG2700	Land at South-West Minster	Good - along A2500		The site is located 0.5 km from Halfway and 4km from Neats Court		The site is 2 km from the nearest junction on the A249	The site has good access to the A249 via the A2500.	No	15	Being actively promoted, but for residential. Site has a recent residential planning permission.	The western parcel would be attractive to industrial/warehouse occupiers and developers as it can utilise existing road infrastructure and connects quickly to the strategic road network. The market is not as prime here as compared to Sittingbourne so space may take longer to occupy, but given the tight nature of the market across the Borough space should be taken-up over the plan period. The eastern parcel is less attractive in market terms and would likely face greater viability issues.	Yes	Possible				No	tbc
REG3044 (R10)	Newington Industrial Estate - southern expansion	Low - set back from the A2 and reasonably well screened from the A2/neighbouring residential.	No other industrial uses in the immediate locality, and residential in close proximity.	Limited provision in Newington 1.0 kms. Nearest major offer Sittingbourne 6.5 kms.	Mostly open storage, layout appears uncoordinated. Sufficient space for parking and servicing.	M2 J5 in 6.8 kms. Immediate access to A2.	Reasonable junction access on to A2. Need to pass through a number of settlements on A2 on route to A249.	No	6	Being actively promoted.	The space is currently fully let and the site is well suited to construction related industries, and is largely open storage. Possible there is more demand than is currently being met. There remains a local market of low cost open storage facilities, and possibly further demand for expansion of existing or entry of a limited number of new occupiers. Redevelopment for other uses unlikely given neighbouring residential and isolation of the site from other industrial uses.	Yes	Yes	Expansion of existing Good market area	None	Good	Yes	2
REG3197	Land at Marshlands Farm, Lower Road, Minster	Good prominence on an A road junction, albeit a relatively minor A road.	Fairly recent residential on opposite side of A2500 is screened, but planting is currently immature. Immediately neighbouring uses are consumer related industrial employment and football club, that don't present compatibility issues.	Some limited provision in Minster 2.5 kms, Sheerness town centre 6.5 kms.	No	J5 M2 15 kms via A250	Good via the A2500 first and then A249.	No	6	Site is being actively promoted. Reg 19 reps proposed inter alia 11,000 sq m floor space for office, industrial and storage uses (specifically targeted to small scale start-up businesses)	There is an industrial estate to the east which appears well occupied. Road access is good, and the existing roundabout could be used to access the site. This site would be attractive to developers, assuming that they could make development viable in this location.	Yes	Yes	Good market area. Being actively promoted. Neighbouring existing estate.	Small scale, but landscape constraints.	Good	Possible	5.6

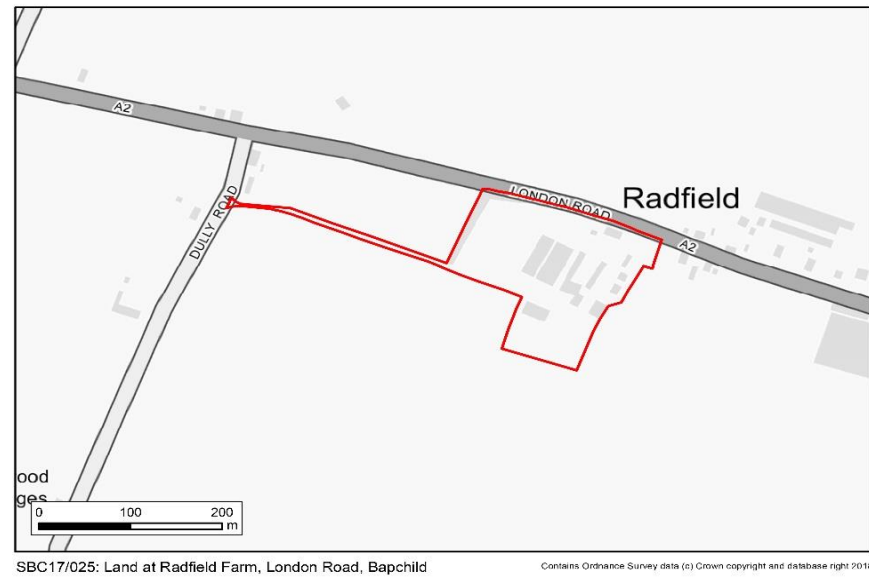
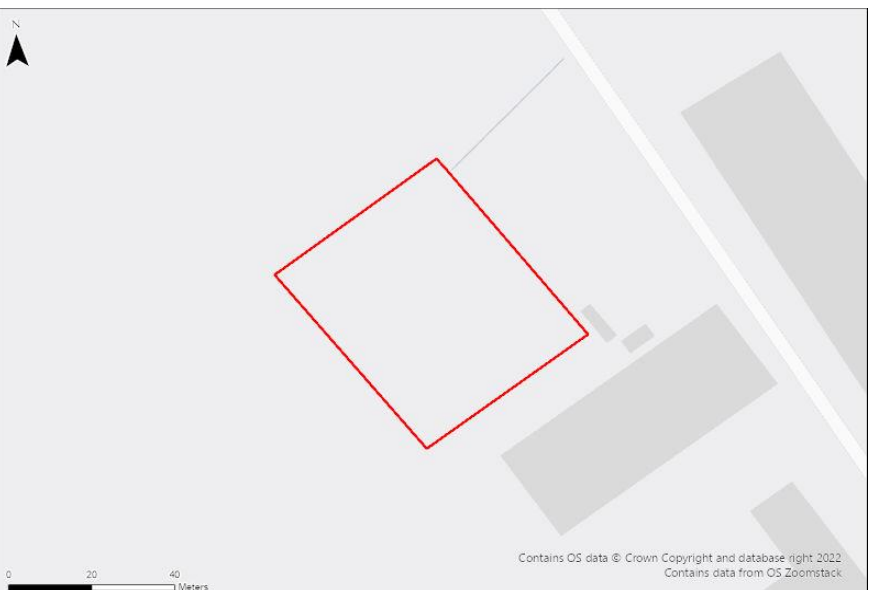


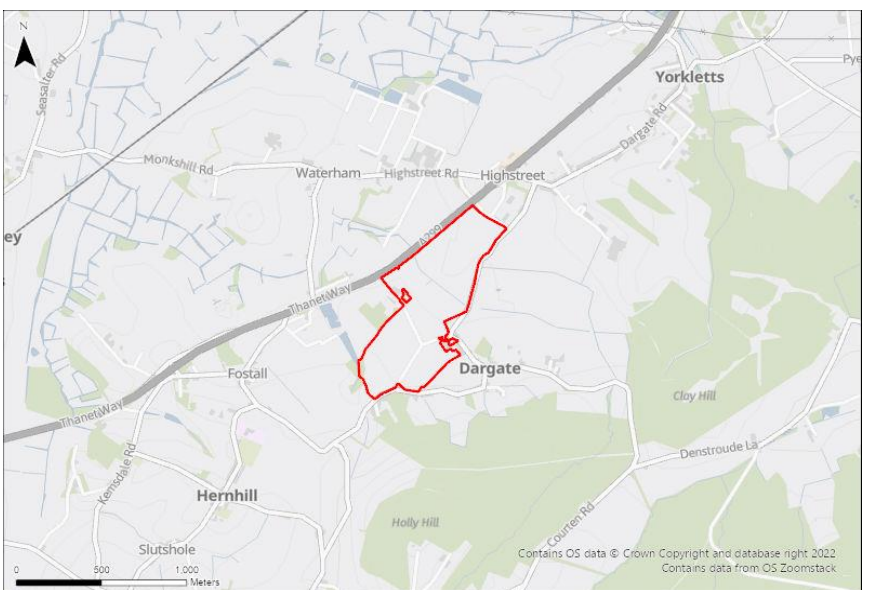
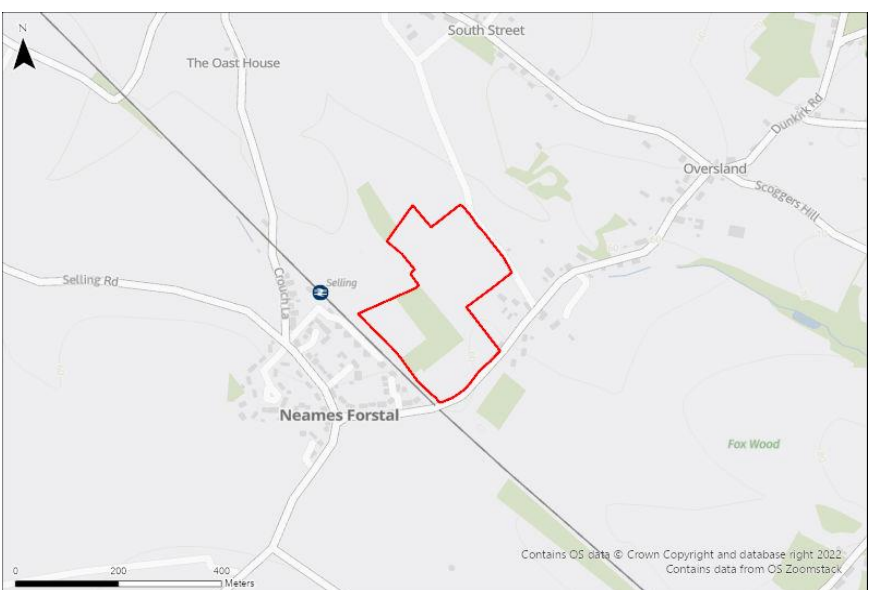
SITES POTENTIALLY SUITABLE FOR EMPLOYMENT USES

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16
BASIC INFORMATION													CONSTRAINTS		
CfS ID.	Name	Site location map	Market Area	Site description	Current use	Is the site previously developed land?	Area (ha)	Sequential location	Proposed principle use	Principle land use (office/indl)	Planning designations	Planning History	(inc. physical and policy)	Overall constraints?	Is this site available?
SBC17/006	Land rear of The Street & Hempstead Lane, Bapchild		Rural west	Land immediately abutting the built-up area boundary. White land, but within the area of search for the Northern Relief Road (but very unlikely to be incorporated in route), and adjacent to an AHLV.	agricultural	No	3.8	Adjacent to the built up area	Light Industrial (B1c)	Industrial	The site is within a designated Important Local Countryside Gaps (DM25). This area is beyond the Bapchild built-up area boundary, and the Local Plan (pol ST3) considers such areas to be located in open countryside, where the primary objective is protection from isolated and/or large scales of development. The site also includes Kent Minerals safeguarded areas (Brickearth); Local Green Space (DM18); and the Safeguarded Area of Search for Sittingbourne Northern Relief Road (AS1).	No recent planning history (5 years)	The gap policy and the Local Green Space policies are the key local policy constraints on development.	Minor	Immediately available
SBC17/093	Hightsted Park		Rural west	Proposed southern expansion of Kent Science Park as part of an urban extension SE of Sittingbourne (south of A2 and wrapping around KSP). The Hightsted Park proposals also include land to the west of Teynham (north of A2 and south of railway line).	Agricultural	No	34.0	Outside the built up area	B class uses	Mixed	The 26 ha Kent Science Park is defined in the Local Plan as one of the Borough's Existing Strategic Employment Locations' (Policy CP1). It is also subject of a specific policy - Policy Regen 4 - that seeks to consolidate and expand KSP's role as a business cluster of regional significance, specialising in technology and knowledge-based businesses that are uses compatible or complementary with the use of the site as a 'Science Park' that supports the start-up, incubation and development of innovation-led, high-growth, knowledge-based businesses. The site is partly within the Kent Level Area of High Landscape Value (DM24), and to the south is the Kent Downs AONB. This whole area is beyond Sittingbourne's built-up area boundary, and the Local Plan (pol ST3) considers such areas to be located in open countryside, where the primary objective is protection from isolated and/or large scales of development.	Two separate 2021 undetermined outline applications for: a) Northern site - land west of Teynham - 98 ha of development - including (1 ha) 2,200 sq m commercial (office) floorspace and b) Southern site - land south and east of Sittingbourne - 577 ha including 170,000 sq m (34 ha) sought for flexible employment uses in the E and B categories.	In terms of acceptable employment uses, these should be restricted to technology and knowledge-based businesses, as the objective for the Science Park is to diversify the local economy providing higher-value employment and skills. The landscape designations on and close to the site, and the need for much improved access arrangements.	Major	Not known
SBC17/095	Hartlip Industrial Estate, Hartlip (extension to)		Rural west	White land to the rear of an existing employment site (a large produce storage/distribution depot that appears to link to port activity) on the A2. Remote location away from main industrial areas, with some auto trade and repair businesses in former farm buildings.	agricultural	No	5.9	Outside the built up area	Light Industrial (B1c)	Industrial	This area is beyond Faversham's built-up area boundary, and the Local Plan (pol ST3) considers such areas to be located in open countryside, where the primary objective is protection from isolated and/or large scales of development. Site is mostly covered by Kent Minerals Safeguarded Areas (Brickearth).	No relevant planning applications	The current policy position does not support incursions into the countryside. No physical constraints of note,	Major	Not available in the plan period
SBC17/100	Halfway Egg Farm, Featherbed Lane, Iwade		Rural west	White land in a key location within the Iwade Important Local Countryside Gap. Open land either side, no other employment uses nearby.	Agricultural	No	2.9	Outside the built up area	Light Industrial (B1c)	Industrial	Within Important Local Countryside Gaps (DM25) policy area, and Kent Minerals Safeguarded Area (Brickearth). This area is beyond a built-up area boundary, and the Local Plan (pol ST3) considers such areas to be located in open countryside, where the primary objective is protection from isolated and/or large scales of development. Proposed housing allocation directly to the north.	Halfway Egg Farm. 14/505074/PNBCM - Change of use agri building to dwelling house. Granted Dec 2014	Critical part of the Important Local Countryside Gaps.	Major	Not available in the plan period
SBC17/119	Milstead Manor Farm, Manor Road, Milstead		Rural west	Farm buildings used for local service provision (such as joinery) in the AONB and close to an Local Designated Site of Biodiversity.	Employment	No	0.8	Outside the built up area	Light Industrial (B1c)	Industrial	Within Kent Downs Area of Outstanding Natural Beauty (DM24) and outside of settlement boundaries so Policy ST3 applies.	Entire site. 17/502135/FULL - Demolition of the existing buildings and erection of nine residential dwellings. Refused July 2017. Appeal dismissed.	Site is within the AONB. Whilst reuse of the existing buildings is possible, expansion would not be supported.	Major	Not available in the plan period
CFS49	Land south and west of Iwade		Rural west	Arable farmland in two adjoining parcels - south of Iwade (but not adjoining, separated by further fields) and west of Iwade (partly adjoining).	Agricultural	No	65.0	Part adjacent to the built up area	Housing - only 1% employment	Industrial	Iwade is a Rural Local Service Centre. Iwade is identified for expansion in the Local Plan to the north, east and south-east. However, these areas does not include CFS49. The site falls within a mineral safeguarding area for brickearth within the adopted Kent County Council Minerals and Waste Local Plan.	No known relevant planning history. There is an existing adjacent housing allocation (ST4), on land East of Iwade.	Within Flood Zone 2 and 3. Close to an area of sensitive/ high landscape value to the west - the Lower Halstow Iwade Ridge. This is particularly relevant for the western parcel. Separation of settlements - Important Local Countryside Gaps (DM27) is very relevant in the case of the southern part of the site. Under current arrangements vehicular access to the strategic network would be taken through Iwade.	Major	According to the promoter, the site is available within 1-5 years

SITES POTENTIALLY SUITABLE FOR EMPLOYMENT USES

BASIC INFORMATION		ATTRACTIVENESS TO OCCUPIERS			Internal environment			Strategic accessibility		Local access by road		Public transport access		Market Signals		Other market intelligence		REVIEW	RECOMMENDATION		Prospect	Consider for employment allocation in the next plan	Potential employment area (Ha)
CIS ID.	Name	Prominence of site	Compatibility of surrounding uses	Access to amenities	Any problems with shape, gradient, boundary etc.?	Proximity to Mway / principal roads (M2/A249/A299) [kms]	Quality of access to the principal road network	Is the site close to a railway station (within 400m)?	Station name & number of bus stops	Evidence of developer / occupier interest?			Is the site likely to be attractive to employment occupiers?	Is the site suitable for employment use?	Positives	Constraints							
SBC17/006	Land rear of The Street & Hempstead Lane, Bapchild	Screened by housing from both the A2 and Hempsted Lane.	Neighbouring residential and agricultural uses. The former would limit development opportunities.	Limited provision in Bapchild, with Sittingbourne town centre 2 kms.	Site backs on to residential gardens on two sides. Achieving access onto the A2 adjacent to the residential will be a challenge.	J5 M2 9 kms	Access on the A2 passes through Bapchild village and Sittingbourne to access the Mway.	No	4	Not for employment	Site is located east of Sittingbourne, which is the Borough's core industrial market, but the site is relatively small, lacks prominence and access would be adjacent to existing residential uses. To the north east of the site is Hempstead Farm which comprises a number of commercial buildings. Overall, the site is only likely to deliver small units, attracting local demand, for which viability is challenging.		Possible	Possible					No	3.8			
SBC17/093	Highsted Park	Low currently given the site is in open countryside and likely to remain so given proximity to landscape designations.	KSP immediately to the north, with open countryside agricultural land on other sides.	KSP provides some provision, Sittingbourne town centre 4 km. Prospect of enhanced local provision (local centres) through proposed urban extension.	No known issues.	J5 M2 7.1 km	Whilst the Mway junction is comparatively close, at this time it is only accessible via rural lanes.	No	0	Planning applications.	If direct junction access to the M2 were provided in this location, then 34 ha of flexible employment space (E/B class uses) would undoubtedly be attractive to the general industrial/warehouse market (a low risk employment generating approach). In respect of a large allocation for science park uses, for the type of technology and knowledge-based businesses the Council would like to see KSP deliver, this would be a high risk approach. Principally because Swale is not in the science park 'golden triangle' (west London / Cambridge / Oxford), and the lack of direct M2 access. For the general employment market there are alternative much more accessible sites, better suited and less constrained to meet future employment needs.		Possible	Possible	Large site Likely to be market attractive	Remote from established employment areas and with major access issues. Range of other sites better related to existing employment areas and to the labour force. However, issues could be resolved if comprehensive mixed use development were taken forward. To allocate or not is	Unlikely	Possible	34				
SBC17/095	Hartlip Industrial Estate, Hartlip (extension to)	Low - to the rear of a large warehouse / coolstores, accessed via a country lane.	Agricultural on most sides, with employment uses immediately to the north.	Limited provision in Rainham 1.5 kms. Nearest major offer Sittingbourne 7.5 kms.	No, regular green field site.	M2 J4 in 7.7 kms. Immediate access to A2.	Good dedicated junction on A2. But link to M2 J4 is via route through Gillingham.	No	0	Unknown	The site could accommodate expansion of the existing activity immediately to the north, which appears to be heavily utilised, and would benefit from shared infrastructure. The site is unlikely to be of interest to other developers because it lacks good access and is remote from other main employment areas.		Yes	Yes	Good market area. Extension to existing.	None	Good	Yes	5.9				
SBC17/100	Halfway Egg Farm, Featherbed Lane, Iwade	Medium prominence close to, but no access on to A249 junction.	Mostly agricultural with new residential to the north.	Limited provision in Iwade 1 km, with Sittingbourne 5.8 kms.	None	J5 M2 7.8kms via Sheppey Way and through Bobbing and A249.	Adjacent to, but with no access to A249 junction. Sheppey Way is suitable for large vehicles. Access to the A249 also possible via B2005, but requires a loop through Iwade.	No	2	Being actively promoted.	Site could be attractive to industrial/warehouse occupiers as it provides good prominence. However, access is not directly on to the A249 and the market is weaker here that compared to Sittingbourne. But the market is currently tight and demand strong for these industrial/warehouse use.		Possible	Possible	Reasonable market area.	Small scale.. Not established location. Access concerns	Possible	Possible	2.9				
SBC17/119	Milstead Manor Farm, Manor Road, Milstead	Low - due to location on a country lane.	Surrounded by agriculturs. Existing local servicing related activities in former farm buildings are compatible.	Nothing in immediate vicinity. Sittingbourne 6.1 kms.	Restricted to using existing buildings.	J5 M2 9.2 kms via country lanes.	Via Bexon Lane and Oad Street	No	0	Unknown	Poor connectivity, rural location and a lack of prominence would be unattractive to occupiers.		No	No				No					
CFS49	Land south and west of Iwade	Low - unlikely to be prominent from the A249.	Possible issues with residential to north.	1.5km from Iwade, and 2.7km from Sittingbourne Town Centre		Close to the Swale Way junction of the A249	Very close to the Swale Way junction of the A249, but there is no direct access, and vehicles would be required to travel north or south on Sheppey Way passing through villages or Iwade to access the A249. The site would need to provide new direct access to the A249 Swale Way junction.	No	9	Site is being actively promoted	A call for sites representation was submitted by Vistry Group promoting the site for a sustainable new development for up to 1,200 new homes and a mix of other complementary land uses such as a new primary school, community facilities and 25 ha of open space provision. Only 1% of the site is promoted for employment.		No	No				No					

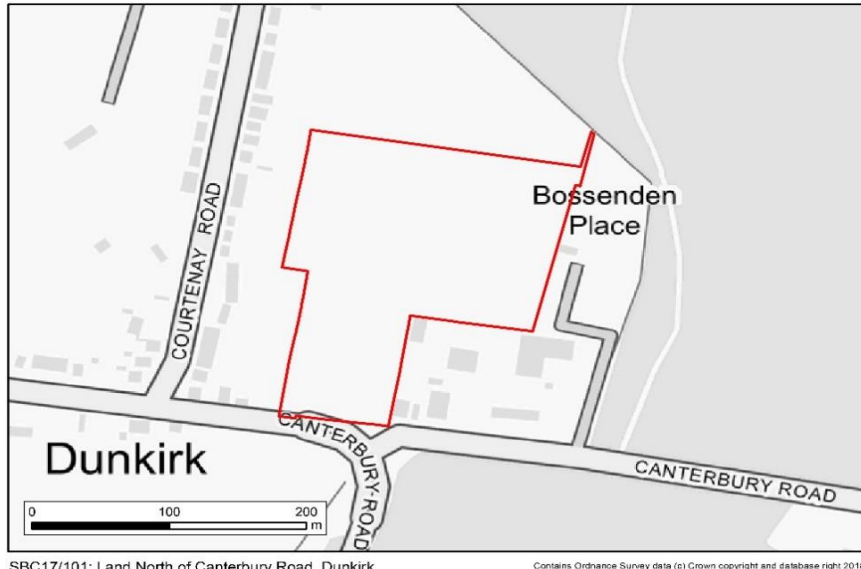
SITES POTENTIALLY SUITABLE FOR EMPLOYMENT USES

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16
BASIC INFORMATION													CONSTRAINTS		
CfS ID.	Name	Site location map	Market Area	Site description	Current use	Is the site previously developed land?	Area (ha)	Sequential location	Proposed principle use	Principle land use (office/indl)	Planning designations	Planning History	(inc. physical and policy)	Overall constraints?	Is this site available?
SBC17/025	Land at Radfield Farm, London Road, Bapchild		Rural west	White land with immediate access to the A2, close to the Fowler Welch warehouse and a small number of businesses on the opposite side of the A2. Redundant farm buildings on approximately half the site.	agricultural (with half the site occupied by redundant farm buildings)	Yes	3.0	Outside the built up area	B1	Industrial	This area is beyond Teynham's built-up area boundary, and the Local Plan (pol ST3) considers such areas to be located in open countryside, where the primary objective is protection from isolated and/or large scales of development. The site is partially within the Kent Minerals safeguarded area (Brickearth)	Site is at the very northern end for 17/506492/ENVSCR - EIA Screening Opinion for 11,250 dwellings and 120,000 sq m commercial space.	For areas such as this, located in open countryside, the Local Plan (pol ST3) considers the primary objective to be protection from isolated and/or large scales of development.	Minor	Immediately available
LPR232	Land rear of Axminster Tools, Stickfast Farm		Rural west	Small addition proposed to existing commercial/farm premises at Stickland Farm, Bobbing.	Agricultural	No	0.3	Outside a built up area	B1	Industrial	The site falls within a mineral safeguarding area for brickearth within the adopted Kent County Council Minerals and Waste Local Plan.	No known relevant planning history.	Proximity to open countryside is a factor, but given the backdrop is the existing farmstead/commercial sheds the landscape constraint is limited. The site falls within a mineral safeguarding area for brickearth within the adopted Kent County Council Minerals and Waste Local Plan.	Minor	Available Immediately
LPR2470 (R15)	Lamberhurst Farm, Yorklets - proposed southern expansion		Rural east	Collection of former farm buildings on a 2.3 ha site in rural location in the east of the Borough, now used for storage and distribution of material supplies, workshops for motor repair and MOTs and some limited vehicle open storage. The site is remote and accessed via a narrow country lane. (the site is within Area of Search 5)	agricultural	No	2.3	Outside the built up area	Mixed B uses	Industrial	Allocation for employment uses promoted through Reg 19 (rep LPR2470) (Pol A5), would expand the site by 3.2 ha on land immediately to the south and provide 7,246 sq m employment floorspace (option 1). Reg 19 refers to potential for this site, which extends over the Borough boundary, to be part of a wider proposal for a mixed use settlement as part of a joint approach with neighbouring Canterbury. At Reg18 (REG3220) a more expansive option 2 was promoted for B2/B8 units extending further north as part of a much more comprehensive mixed use proposal that could provide net additional floorspace up to 36,836 sq m on 10.8 ha.	No known relevant planning history.	Significant landscape, heritage and transport constraints. Access via narrow rural lanes & located in open countryside with the Swale Level Area of high landscape value immediately to the south.	Major	Immediately available
CFS5 (R8)	Waterham Industrial Estate - expansion east		Rural east	A small industrial estate in a rural location with junction access to the A299 (Thanet Way). The site is bordered by a small number of residential and two very large glass houses. The principle use is storage which occupies the newer units, but some of the older units are used for engineering activity. Site area includes 0.5 ha on adjacent site with planning permission (same site was promoted in call for sites).	agricultural	No	3.1	Outside the built up area	Storage and Distribution (B8)	Industrial	Call for sites representation (CFS5) seeks employment use.	2021 planning permission for 3 new industrial units totalling 1,400 sq m on land of 0.5 ha immediately east of the existing Estate. All three are for named businesses seeking expansion - two are currently at Waterham and the third in Canterbury. Call for sites representation (CFS5) for the same site for employment use.	No relevant policy designations	None	Immediately available
30	Dargate Plumpudding Lane		Rural east	Arable farmland immediately south of the A299 (Thanet Way), and adjacent to the Highstreet interchange. Land immediately to the east has planning permission for no.35 small industrial units.	Arable farmland	No	35.0	Outside built up area	Mix of E/B uses	Industrial	No designations apply to the site. An Area of High Landscape Value is in close proximity to the south. Close proximity to a locally designated site for biodiversity. The southern boundary overlaps with a Brickearth Swale Safeguarded Area defined by the Kent Minerals and Waste Local Plan.	Land immediately to the east (island site) has planning permission for 13 small commercial units summing to 1,170 sq m (for general industrial, storage and distribution, and light industrial use) (20/502407/FULL). Permission also on western side of the island site for 34 small units totalling 3,060 sq m, which is currently the subject of a revised application for 3,336 sq m (21/502972) yet to be determined application 22/502565/FULL Proposed development consisting of a drive through restaurant and 3no. commercial buildings with a total floorspace of 4043 sq.m	Other than the policy constraints, there are no other known site constraints. Plumpudding Lane is subject to rural lanes policy. However there is direct access onto the A299.	Minor	Immediately Available
CFS29	Land at Fox Lane, Oversland, Boughton		Rural east	This is a greenfield site, formerly an orchard, located by the village of Oversland. The site borders railway tracks.	Horticultural - former orchard	No	2.0	Outside the built up area	Mixed use	Unknown	Partly located within the Kent Minerals and Waste Plan Safeguarded Area - Brickearth Swale Areas. Access is via Rural Lanes. The Grade II listed Rose Cottage is located just outside the site boundary.	No known relevant planning history.	Close proximity to Kent Downs AONB. Although located 3 miles from J7 M2 the only access is via Rural Lanes. Policy DM26 engaged. Also constrained by its partial location within the Kent Minerals and Waste Plan Safeguarded Area - Brickearth Swale Areas. Grade II listed building located just outside the site boundary.	Major	Immediately available

SITES POTENTIALLY SUITABLE FOR EMPLOYMENT USES

BASIC INFORMATION		17	18	19	20	21	22	23	24	25	26	27	28			30	29	
		ATTRACTIVENESS TO OCCUPIERS			Internal environment		Local access by road		Public transport access		Market Signals		REVIEW / RECOMMENDATION					
CIS ID.	Name	Prominence of site	Compatibility of surrounding uses	Access to amenities	Any problems with shape, gradient, boundary etc.?	Proximity to Mway / principal roads (M2/A249/A299) [kms]	Quality of access to the principal road network	Is the site close to a railway station (within 400m)?	Station name & number of bus stops	Evidence of developer / occupier interest?	Other market intelligence	Is the site likely to be attractive to employment occupiers?	Is the site suitable for employment use?	Positives	Constraints	Prospect	Consider for employment allocation in the next plan	Potential employment area (Ha)
SBC17/025	Land at Radfield Farm, London Road, Bapchild	Highly prominent from A2.	Although there are some small businesses operating on the opposite site of the A2 and Fowler Welch close by, the immediate neighbouring uses are residential including listed oast houses, where there will be compatibility issues.	Limited local provision, Teynham 1.1 km and Sittingbourne 3 kms.	No	J5 M2 10 kms	Access on the A2 passes through Bapchild village and Sittingbourne to access the Mway.	No	2	Being actively promoted.	Not an established employment location, but would be attractive to small and mid size industrial/warehouse occupiers if it were redeveloped as part of the SBC/17/006 promoted site, but as a standalone development viability is likely to be challenging.	Yes	Yes	Likely to attract small/medium sized businesses	Unproven market area. Small scale	Possible	Possible	3.0
LPR232	Land rear of Axminster Tools, Stickfast Farm	Low - on Sheppey Way	Compatible with neighbouring industrial.	2.5 km from Sittingbourne Town Centre	None	Junction access to the A249 north and south, but requires passing through villages.	Sheppey Way south to the A249 Bobbing junction (1.7 km to the east), avoids the need to travel through Iwade.	No	4	Site is being actively promoted for expansion of the existing employment area.	The proposal is modest in scale and appropriate to meet rural needs. Likely to provide expansion space for existing occupiers.	Yes	Yes				No	
LPR2470 (R15)	Lamberhurst Farm, Yorklets - proposed southern expansion	Low - in the countryside.	Low - no other employment uses nearby.	Limited provision 1.0 kms Highstreet. Whitstable 6kms.	Poor - unplanned former agricultural buildings without clear parking and servicing areas and no internal landscaping.	A299 (becomes the M2) 0.8kms (via minor roads).	The access roads are very narrow country lanes.	No	0	Being actively promoted.	Current provision - low quality units only suitable for local storage and local car mechanics. Opportunities to serve the rural economy are not finite, especially in the rural east. This site would be in competition with better located more prominent sites in the east of the Borough such as Waterham and Plumpudding Lane. Question mark over whether there is sufficient demand for any more employment at this location. The site lacks prominence to the A299 and the site access road is poor to be attractive to occupiers. Market demand is stronger to the west of the Borough where there is a greater critical mass of similar uses and better links to London. Site is only likely to be attractive to local occupiers who have links to the area. Viability is likely to challenging in this area, as rents for units in this location will be lower than seen elsewhere.	Yes	Yes	Expansion of existing	Landscape constraints will limit possibilities. Unproven market.	Possible	Yes	3.2
CFS5 (R8)	Waterham Industrial Estate - expansion east	Low - in the countryside.	Dwarfed in breadth by the scale of the nursery glass houses.	Limited provision in High Street. Nearest centre Whitstable 5.5 kms.	Whilst in the countryside the estate lacks soft landscaping, but the parking and servicing areas are ample.	A299 (that becomes M2 at J7) in 0.5 kms.	Access via the High Street is narrow, but adequate to meet the relatively low level of use and the small number of large vehicles accessing the site.	No	3	Being actively promoted.	Existing Estate is a mix of newer and older units, but all are of reasonable quality. Units will be attractive to occupiers throughout the plan period. The permitted units are likely to be constructed and available in 2023.	Yes	Yes	Extension to existing	Weaker market area	Good	Yes	0.5
30	Dargate Plumpudding Lane	Medium - fronting the A299.	High - roadside services and prospect of employment uses immediately to the east.	Limited offer in Highstreet and Thanet Way services	None	Direct access onto the A299 at the Highstreet/Dargate interchange.	Plumpudding Lane provides access in either direction to the A299 at the Dargate interchange. However, it is a Rural Lane and would need upgrade to serve a major development at this site.	No	0	Being actively promoted - commercial floorspace on the eastern parcel extending to 12.9 h The commercial offer: • Office 5,500 sq m • Small Industrial Units 20,600 sq m • General Industrial Units 13,200 sq m • Storage and Distribution 6,500 sq m	Site could attract industrial/warehouse uses, but is located in the east of the Borough where demand is weakest. Site would only appeal to local demand but viability would be challenging.	Possible	Possible	Owner interest	Unproven market	Possible	Possible	12.9
CFS29	Land at Fox Lane, Overland, Boughton	Low - rural location	No incompatibility issues.	The site is 4km from MacKnade Cluster.	None	3 miles from junction 7 on the M2.	1.6km from A2, but there is no junction access and only rural lanes between the site and the principal road network.	Yes	Selling Rail Station, 3 bus stops	Being actively promoted for a mixed-use scheme with affordable housing	Site it too remotely located to be attractive to office or industrial/warehouse occupiers. Access and links to principal A roads is too poor and a lack of nearby amenities and public transport links.	No	No				No	

SITES POTENTIALLY SUITABLE FOR EMPLOYMENT USES

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16
BASIC INFORMATION													CONSTRAINTS		
CfS ID.	Name	Site location map	Market Area	Site description	Current use	Is the site previously developed land?	Area (ha)	Sequential location	Proposed principle use	Principle land use (office/indl)	Planning designations	Planning History	(inc. physical and policy)	Overall constraints?	Is this site available?
SBC17/101	Land north of Canterbury Road, Dunkirk		Rural east	Agricultural land to the rear of an existing employment site that predominantly serves the local consumer market.	Agricultural	No	3.4	Adjacent to the built up area	Light Industrial (B1c)	Industrial	Within Area of High Landscape Value (Kent Level) and beyond a built-up area boundary, and the Local Plan (pol ST3) considers such areas to be located in open countryside, where the primary objective is protection from isolated and/or large scales of development.	Entire site. 17/500313/OUT - Outline application for 49 dwellings with B1 and A1 units. Refused August 2017. Appeal dismissed.	Local landscape designation.	Major	Not available in the plan period

SITES POTENTIALLY SUITABLE FOR EMPLOYMENT USES

2 BASIC INFORMATION		17 ATTRACTIVENESS TO OCCUPIERS	18 External environment	19	20 Internal environment	21 Strategic accessibility	22 Local access by road	23 Public transport access	24	25 Market Signals	26	27 REVIEW	28 RECOMMENDATION				30	29
CfS ID.	Name	Prominence of site	Compatibility of surrounding uses	Access to amenities	Any problems with shape, gradient, boundary etc.?	Proximity to Mway / principal roads (M2/A249/A299) [kms]	Quality of access to the principal road network	Is the site close to a railway station (within 400m)?	Station name & number of bus stops	Evidence of developer / occupier interest?	Other market intelligence	Is the site likely to be attractive to employment occupiers?	Is the site suitable for employment use?	Positives	Constraints	Prospect	Consider for employment allocation in the next plan	Potential employment area (Ha)
SBC17/101	Land north of Canterbury Road, Dunkirk	Medium - on the route into the village centre, but not visible from the A2.	Industrial uses immediately adjacent, but also residential to the west. Agriculture and woodland to the north.	Limited provision in Boughton 1.5 kms, and Canterbury 7kms.	None	M2 J7 4.4kms (via minor roads).	The access route - Canterbury Road to the M2 J7 is narrow in places and goes through settlements.	No	2	Being actively promoted.	Site is located in the east of the Borough, significantly away from the core industrial area of Sittingbourne and the main town centres. Site would not be attractive for general office and industrial requirements, further the site's size and location would also make viable development challenging.	Yes	No				No	