



Nathaniel Lichfield
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Planning. Design. Economics.

**Northern West Sussex Economic
Growth Assessment**

Appendices

Crawley Borough Council
Horsham District Council
Mid Sussex District Council

22 April 2014

13512/MS/CGJ/LE

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Appendix 1 List of Consultees

Commercial property agents

Adam Godfrey, Stiles Harold Williams

Andrew Osborne, Vail Williams

David Bessant, Graves Jenkins

Adam Walker, Crickmay

Other stakeholders

Rita Burns, Planning Manager, Gatwick Airport Ltd

Emma Rees, Head of Property, Gatwick Airport Ltd

Rosemary French, Executive Director, Gatwick Diamond Initiative

Ron Crank, Director, Coast to Capital Local Enterprise Partnership

Chris Baister, Economic Development & Enterprise Manager, Horsham District Council

Lise Sorensen, Economic Development, Crawley Borough Council

Steve Sawyer, Manor Royal Business District Manager

Jeremy Taylor, Chief Executive, Gatwick Diamond Business

Ian Harper, Crawley and Gatwick Chamber of Commerce

Ann Swain, Federation of Small Businesses

Appendix 2 Performance against key LEP Growth Sectors

Crawley

LEP Growth Sectors	No of Workforce Jobs (2013)	LQ/Sector Representation (South East)	Employment Growth (1997-2013)	Baseline Growth Forecast (2013-2031)
Health and Life Sciences	1,940	0.3	194%	20%
Creative, Digital and IT	2,970	0.6	101%	10%
Advanced Engineering	490	0.7	-48%	-12%
Financial and Business Services	26,720	1.3	83%	23%

Source: Experian 2013 / NLP analysis

Horsham

LEP Growth Sectors	No of Workforce Jobs (2013)	LQ/Sector Representation (South East)	Employment Growth (1997-2013)	Baseline Growth Forecast (2013-2031)
Health and Life Sciences	1,780	0.5	80%	20%
Creative, Digital and IT	2,280	0.8	75%	17%
Advanced Engineering	1,070	2.4	-40%	-6%
Financial and Business Services	13,270	1.0	24%	19%

Source: Experian 2013 / NLP analysis

Mid Sussex

LEP Growth Sectors	No of Workforce Jobs (2013)	LQ/Sector Representation (South East)	Employment Growth (1997-2013)	Baseline Growth Forecast (2013-2031)
Health and Life Sciences	5,900	1.4	14%	21%
Creative, Digital and IT	2,930	0.9	27%	17%
Advanced Engineering	440	0.9	-38%	23%
Financial and Business Services	11,910	0.9	-23%	23%

Source: Experian 2013 / NLP analysis

Appendix 3 Employment Space in Adjoining Areas

Adur

Adur is situated to the south of Northern West Sussex and its economic strengths lie within the wholesale, retail, health, manufacturing and professional, scientific and technical sectors. Relative to the South East it also has a strong concentration of employment in mining and quarrying due to the activities at Shoreham Harbour.

The District's 2011 Employment Land Review Update (2011, GL Hearn) identifies 351,000 sq.m of employment floorspace within the District, of which 41% is industrial floorspace, 25% warehouse floorspace and just 6% office floorspace. The economy is closely interrelated to those of Worthing and Brighton and Hove. The ELR Update identifies a current need for additional employment space with around 8,000 more residents in work than there are jobs.

According to the 2012 Annual Monitoring Report, Adur has a number of well established business areas, including Lancing Business Park, Dolphin Road, Shoreham Harbour and Shoreham Airport, but there is a scarcity of readily available land for new economic development. The emerging Local Plan seeks to maximise the creation of further employment floorspace within the District in order to deliver 3,700 jobs up to 2031, which would nearly halve the deficit of 8000 jobs, reduce net out-commuting from the district, provide higher value-added employment and supporting the image and profile of the district as a business location.

In order to achieve this, the ELR Update has identified three potential sites for employment growth at Shoreham Harbour, Shoreham Airport and New Monks Farm. The type of employment floorspace provided on each site would vary according to the character and nature of the site. In theory this will create up to 66,000 sq.m of employment land in Adur up to 2028; up to 30,000 sq.m at Shoreham Airport, up to 10,000 sq.m at New Monks Farm and up to 26,000 sq.m within Shoreham Harbour Regeneration Area.

The 2012 Annual Monitoring report shows that there is currently a lack of new employment floorspace being created in the District. The 2006 Adur Employment Land Study recommended that at least 4,000 sq.m (net) of employment floorspace should be provided annually in order to support economic growth. In 2011 there was only an 813 sq.m net increase in employment floorspace, and only 953 sq.m net in 2012, of which less than half was on brownfield land. Based on the existing Adur Local Plan (1996) and developments that are under construction but have not yet been completed, a total of 5.25 ha of land remains available for employment uses. Shoreham

Harbour represents the most significant long term regeneration project in the District, and has been subject to wide spread consultation and Master Planning. It builds on a long standing aspiration to maximise the potential of Shoreham Harbour and to revitalise the area for the benefit of local communities and the wider sub-region. The mixed-use development is expected to improve employment opportunities in the area by bringing forward a range of business premises for both industrial uses that have traditionally occupied the area as well as higher-value sectors.

Arun

Arun lies to the south of Northern West Sussex, between Chichester and Brighton & Hove. Arun is largely rural in the north surrounding Arundel, a key town, whilst the south is more urbanised with towns such as Bognor Regis and Littlehampton situated on the South Coast. The largest employment sectors in the District are distribution, hotels and restaurants which provide around 30% of jobs, followed by public administration, education and health at approximately 27%. Manufacturing accounts for 12% of jobs whilst there is a significant commercial horticulture industry. Unemployment is high in parts of Bognor Regis and Littlehampton, whilst the District as a whole experiences high levels of out-commuting partly because opportunities within the area are limited (over 37% of residents in employment commute elsewhere). The Arun Economic Strategy 2009-2026 identifies that a relatively limited economic base should be addressed by the provision of well-located employment sites; good quality modern premises; premises suitable for business start-up companies, and; premises suitable for small businesses.

In terms of the current stock of employment space, in 2008, Arun contained some 644,000 sq.m of B class floorspace. Over 93% of this employment space was industrial premises, with only a small proportion (7%) of office space. The majority of the industrial space (58%) comprises manufacturing premises, the remainder is distribution (NLP, 2010). The 2011 Annual Monitoring Report shows that the amount of gross floorspace for employment use provided in the year to 31st March 2011 was down by more than 35% compared with the prior year, but there was an overall net gain of 3,123 sq.m for the year. The majority of this net gain was for storage and distribution uses, all of which was on previously developed land. In terms of employment land availability, the 2011 AMR reported 29.3ha of availability, of which 26.05ha was accounted for on allocated sites at Roundstone (3ha) and Oldlands Farm at Bognor Regis (23.05ha). The 2010 NLP analysis concluded that currently allocated land provides an adequate quantitative supply of industrial land to meet future needs of Arun to 2026, under different estimates of future demand. However, this situation would not apply were some sites not to come forward for development. Indeed, there is a strong risk of a shortfall over the plan period if the Oldlands Farm site fails to be delivered. A similar situation applies to land for office development. We understand that Oldlands Farm remains undeveloped.

Brighton & Hove

Brighton & Hove is situated south of North Western Sussex on the South Coast between Adur and Lewes. According to the 2011 Census, the authority's population stands at 273,400. The area is tightly constrained given its location between the South Downs National Park and the sea, but benefits from good rail links to London and acts as a regional transport hub. Brighton & Hove has traditionally functioned as an economic growth hub for the wider sub-region but has evolved into an increasingly knowledge-based economy with strengths in creative industries such as media and technology. Brighton & Hove is also a major tourist and conference destination with significant day and night visitors.

As noted in the 2012 Employment Land Study (NLP), Brighton & Hove has 854,000sq.m of employment floorspace, the largest of all five of its adjoining districts. The existing employment stock is considered fairly ageing and lacking in modern premises, but vacancy rates remain low. In terms of development rates, a gross figure of just over 13,700 sq.m of B Class space was developed per annum across the area between 2000 and 2012. The majority of this new floorspace was developed for B1a/b office uses (60%), less for B1c and B2 factory/industrial uses (23%), and only 17% for B8 distribution. As far as losses are concerned, between 2000-2012 an annual average loss of just over 7,320 sq.m was recorded. These losses were mainly to residential use, closely followed by retail (A1-A3) and D1 uses such as medical/health centres and language schools.

In terms of supply, in 2012 Brighton & Hove had 21,110 sq.m of extant permissions for employment space as well as a further 109,300 sq.m of land identified in development areas in the Draft City Plan. Of the employment development areas, significant floorspace capacity is identified at Eastern Road/Edward Street (33,200 sq.m), Toads Hole Valley (25,000sq.m) and a proportion of Shoreham Harbour (7,500 sq.m) although the majority of this site falls within Adur. In quantitative terms, Brighton & Hove has enough office floorspace to meet future needs up to 2030 under various scenarios of growth, subject to the outcome of the Draft City Plan. The supply of industrial space identified in the Draft City Plan is insufficient to meet future needs, and although not perceived as an important industrial location, demand remains strong and there is a need to modernise and upgrade existing stock.

Chichester

Chichester lies to the southwest of Northern West Sussex and is a largely rural District on the South Coast. It has one major town, Chichester, which is the West Sussex County Town, and much of it lies within the South Downs National Park. The 2012 Annual Monitoring Report shows that the annual amount of employment floorspace completed (gross and net) in the District has fallen over the five year period from 2007 (with the exception of high level provision in 2007-08 due to the new Rolls Royce HQ at Westhampnett). In

2011 there was only an 1,230 sq.m net increase in employment floorspace, and only 2,467 sq.m net in 2012. The percentage of gross employment floorspace completed on previously developed land increased from 77% in 2010-11 to 90% in 2011-12.

The main employment areas lie beside Chichester and Tangmere, on the A27 corridor. The two largest are Quarry Lane Industrial Estate, with mainly distribution and light industrial uses, and the Terminus Road Industrial Estate. Currently there is 22 ha of employment land with planning permission, and a further 7.8 ha on allocated sites not yet developed. Larger schemes in the development pipeline include 17,468sqm of B8 floorspace in the Glenmore Business Park scheme on the Portfield Quarry site; a 5 storey office building of 2,714sqm at Terminus Road, Chichester; 3,635sqm of employment floorspace across a number of sites within the Quarry Lane Industrial Estate, Chichester.

Taking account of this supply, a recent Employment Land Review Update (2013, GL Hearn) recommended that the district identify up to 29 ha of employment land outside of the National Park - up to 8 ha of land for office development and up to 21 ha for industrial uses. It also recommended provision of 4.5 ha of employment land at Chichester Business Park, and up to 18 ha of further employment land through further strategic development sites in and around Chichester, with any such sites having good access to the A27.

Lewes

Lewes is situated east of Northern West Sussex. There are around 30,900 jobs in Lewes with key employment sectors including public administration, education and health.

The emerging Core Strategy (Proposed Submission, 2013) is critical of the current supply of employment premises in the district noting that they are ageing and do not meet modern business requirements. The Core Strategy also states that employment land is under pressure from higher-value competing land uses particularly residential and retail.

The future strategy for employment land is set out within the emerging Core Strategy and the Employment & Economic Land Assessment (2010, NLP) and Update (2012, NLP) for the District. The Core Strategy sets out the aim to identify where there is a lack of good quality modern business premises of all sizes in order to support the incubation, growth and retention of local businesses and the District's ability to attract inward investment. Lewes aims, within the Core Strategy, to provide 74,000 sq.m of employment floorspace between the period of 2012 and 2031. Of this aim, 60,000 sq.m of floorspace will be provided for industrial uses while 14,000 sq. will be office space.

The emerging Core Strategy follows the strategy which is put forward by the Employment and Economic Land Assessment Update and identifies that the majority of employment land commitments will be in Newhaven and Lewes town, where there is currently the most significant short fall. The EELAU

recommended that a 1-1.5 hectare industrial site in or near to Lewes town should be created along with an additional 1-1.25 hectares of office sites in or around the town. The EELAU has suggested this amount of space in order to ensure that Lewes reaches its economic potential.

According to the 2012 Annual Monitoring Report, the amount of net floorspace developed for employment land (1,183.5 sq.m) has decreased slightly in comparison to 2010/11 (1,254.15 sq.m). There was no net loss of employment land in 2011/12 which is consistent with previous years. This suggests current policies protecting employment land are proving effective as less is being lost to other uses. However, 286 sq.m of B1a floorspace was lost to residential and 32 sq.m was lost to retail.

The Newhaven Port Masterplan was published in 2012 and sets out the vision, strategic objectives and proposals from which the port will develop over the next 20 to 30 years. The key components of this Masterplan are to maintain the Newhaven-Dieppe ferry route; invest in infrastructure to establish a clean technology and renewable energy business cluster, building on the success of existing local businesses and the current opportunities in off shore wind; increase the volume of international trade through the port; invest in infrastructure for the continued development of the fishing and leisure marine sectors, and; enhance the natural marine environment. It is unclear at this stage how this vision will translate into employment space requirements, however, the site's owners believe that the regeneration scheme has the potential to attract up to 300 new jobs to the area over the next 5 to 10 years.

Mole Valley

Mole Valley lies at the heart of Surrey, midway between London and the Sussex coast. The district shares a border with Crawley to the southeast and Horsham to the south. The majority of the district is countryside (over 90%), but approximately 72% of the population live in the main built-up areas such as the towns of Dorking and Leatherhead, and residential areas of Ashted, Bookham and Fetcham. The district has good transport links in terms of highways and rail links, as well as quick access to Gatwick airport which lies just over the southeast boundary in Crawley.

The Mole Valley Local Economy and Employment Land Review (2008) indicated that there was a total of 496,000 sq.m of B1-B8 floorspace in the district in 2007. The key points of the Review state that the employment floorspace is relatively modern, there is a significant amount of unimplemented floorspace with permission and vacant space – at the end of March 2012 this figure totalled 61,660sq.m. The majority of the current employment floorspace is located west of Leatherhead (Leatherhead Industrial Estates, Leatherhead Research Area, Kingston Road and areas surrounding Leatherhead Station), and west and north of Dorking (Curtis Road, Vincent Land and Dorking Station). The 2011-12 Annual Monitoring Report indicates that at March 2012,

39,460 sq.m of existing employment (B1-B8) floorspace was vacant. This is about 8% of total employment floorspace stock in the district and is a continuation of the trend of increasing vacancy levels (7.2% in 2010-11 and 6.4% in 2009-10). The 2008 Local Economy and Employment Land Review indicated that in general there was sufficient employment floorspace in the pipeline to accommodate all trend based B1-B8 employment growth requirements up to 2026 with a surplus of approximately 18,405 sq.m.

Reigate & Banstead

Reigate & Banstead is situated between Mole Valley (west) and Tandridge (east), and north of Crawley. The area has experienced steady population growth over recent decades and is forecast to continue to do so (140,400 in 2012). The resident population is focussed on the main towns of Banstead, Reigate and Redhill, as well as a range of smaller settlements. The area benefits from good transport links to central London and the South East via the M23/M25 corridor, whilst it also has national and international links via the mainline railway and Gatwick Airport.

The Reigate & Banstead Economic Market Assessment 2008 identified an undersupply of 57,534 sq.m of office space and an oversupply of 67,021 sq.m of industrial floorspace to 2026. These figures were refreshed as part of the Council's economic evidence update in 2011 and were considered post economic downturn. The refreshed figures result in an undersupply of 10,383 sq.m of office space and undersupply of 26,891 sq.m industrial floorspace, the majority of which is forecast B8 use. In terms of key sites, Redhill (Red Central) and Reigate (Regus Building and Foundation House) are the main office locations in the Borough and are also strategically important within the South East. From an industrial perspective, Redhill is the centre for such activity. The most prominent locations are Holmethorpe Avenue north of the town centre, and Salfords and Perrywood Business Park which are both situated to the south.

Tandridge

Tandridge is a predominately rural district situated in east Surrey. The district shares borders with both Crawley (southwest) and Mid Sussex (south). The main urban settlements are Caterham and Warlingham/Whytelleafe in the north, and Oxted/Hurst Green/Limpsfield south of the M25. Tandridge has a population of just over 83,000 (2011 Census), of which a large proportion of the working residents commute outside the District.

In terms of employment floorspace, the Tandridge Economic Study (2007) shows a total of 353,000 sq.m of floorspace across the district. Since 2000, there has been a reduction in total office and factory floorspace, but a large increase in warehouse space. The Study also noted vacancy rates in Tandridge were 8% in 2004, the joint highest since 1991. The quality of employment floorspace stock is varied. The Study states that approximately 40% of office

stock was completed between 1990-2000, and a further 40% of factory stock post-1981. The largest proportion of premises in the south of the district are factories and warehouses, whilst the town centres of Caterham and Oxted have the largest number of office premises. Hobbs Industrial Estates and Lambs Business Park are two key employment sites outside of the urban area and are identified as major developed sites in Green Belt.

The Tandridge Annual Monitoring Report 2011-12 notes there is 5,095 sq.m of employment space with planning permission or under construction, and a 1.25ha site (Smallfield) allocated for business use without planning permission (its allocation will be reviewed through the site allocation DPD process). The AMR states that 4.15ha of employment land was lost to other uses (generally housing) over the monitoring year period.

Waverley

Waverley is a mainly rural Surrey borough with four main settlements: Farnham, Haslemere, Godalming and Cranleigh, which contain the main employment areas. Employment growth over the past decade has been modest, constrained by the relatively scarce supply of undeveloped employment land. Employment in the Borough is dominated by office based activities. There also appears to be a focus on knowledge driven occupations such as business and finance and computer/telecommunications.

The Waverley Employment Land Review Update (2011, Atkins) forecasts a need for only 0.8 ha net employment land by 2027 based on a recommended 'base scenario'. In contrast, the Update states that employment in the B1 sector will increase significantly, and as such will require 33,864 sq.m of B1 floorspace by 2027. It is estimated that there is 5.3 ha of available, derelict or vacant land or buildings on existing employment sites in the Borough, which could potentially be suitable for redevelopment in the short term to meet the forecast need. A further 12 ha of land with redevelopment potential in the medium/long term was also identified.

The Borough's approach to employment land is to safeguard the existing supply of employment land, protect sites that are fit for purpose, encourage intensification of uses within existing employment locations and look to making any provision of additional sites from the existing sites with redevelopment potential. No major new allocations are proposed to date but the Core Strategy supports continued employment growth at Dunsfold Park, a large aerodrome site and the largest employment site in the borough with mainly small businesses. Waverley does not appear to have a large supply of employment land, no major new allocations are proposed and there no major new developments in the pipeline.

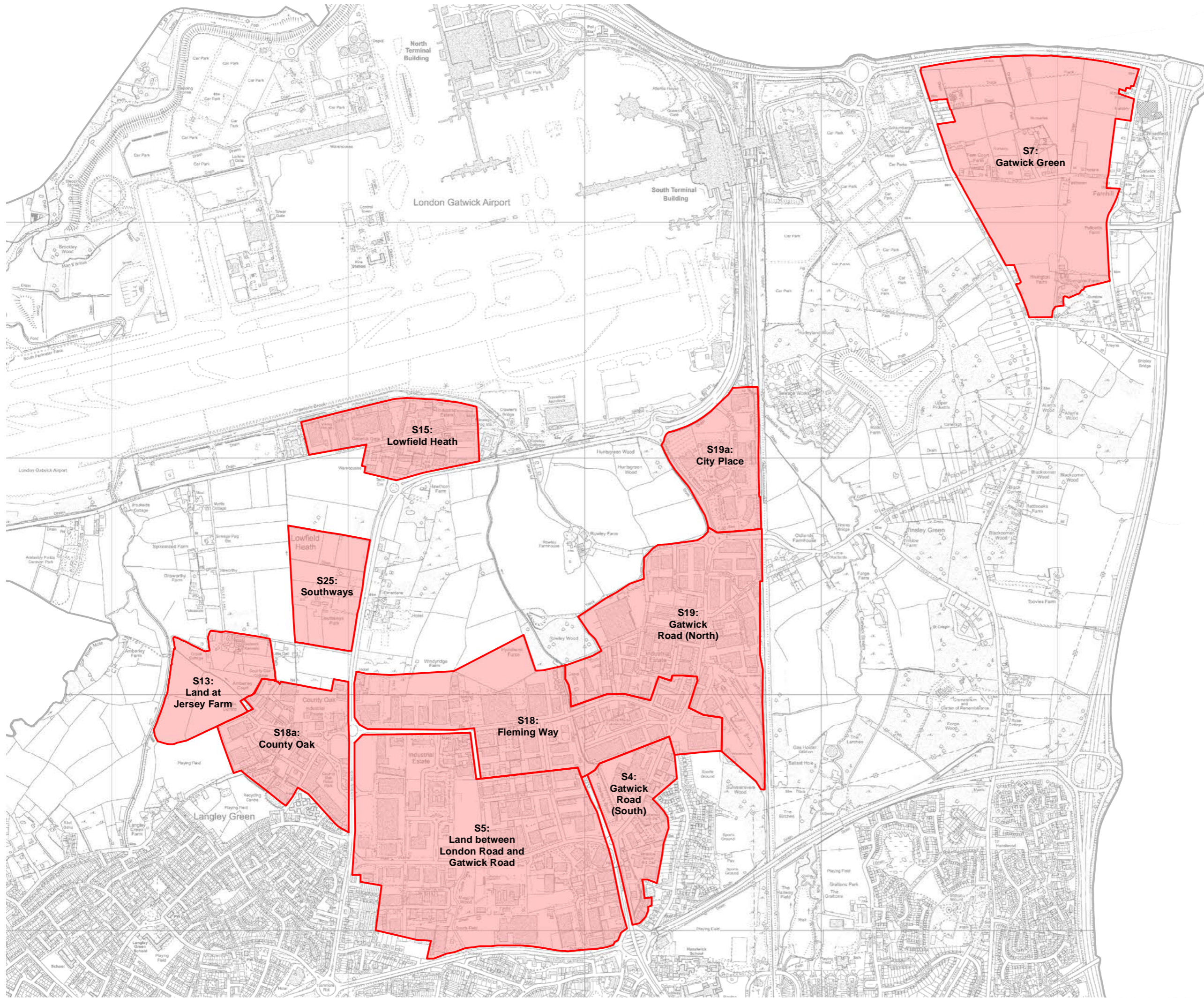
Wealden

Wealden is situated in East Sussex and borders Mid Sussex District to the west. Wealden is a large rural district with a dispersed settlement pattern and five main towns, Crowborough, Hailsham, Heathfield, Polegate and Uckfield. Due to their geographical location and links to Brighton & Hove, Eastbourne, Tunbridge Wells and Crawley as well as London, these towns have not grown significantly in past years. Half of the district's population of around 146,000 live outside of the urban areas in rural locations which creates particular service provision, employment and transport challenges.

The existing employment floorspace situation in Wealden is unclear as the last Employment Land Review was conducted in 2008 for Wealden and Eastbourne Councils using Super Output Areas rather than district boundaries. To offer a snapshot of the 2008 Review, North Wealden was projected to need a total of 48,391 sq.m of employment floorspace by 2026, the majority in office and industrial sectors, with a minimal warehouse need. This need was scoped up to account for a frictional margin, to total 60,182 sq.m. Key sites include Beacon Business Park and Sybron Way, Crowborough, Ashdown Business Park in Maresfield, Bell Lane Uckfield, Diplocks Way Industrial Estate in Hailsham, and Chaucer Business Park in Polegate.

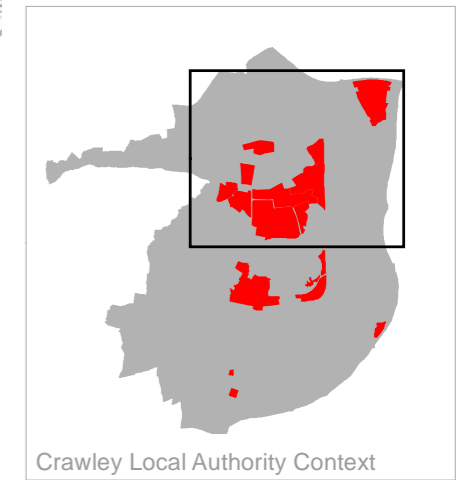
The Wealden Local Plan (2013) allocated 38,190 sq.m employment floorspace for development to 2027. This floorspace provision is evidenced in the Council's Employment Land Provision Calculations (2010) and it is intended that sites to meet this need will be identified through the Council's Site Allocations DPD. The Wealden Annual Monitoring Report 2011-12 shows a 4,702 sq.m net increase in employment floorspace over the monitoring year. This figure is less than previous years and is attributed to the continued economic downturn.

Appendix 4 Site Plans



Key

Employment Site



Crawley Local Authority Context

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Project Northern West Sussex EGA

Title Employment Sites - Crawley

Client Crawley Borough Council, Horsham District Council & Mid Sussex District Council

Date 23.04.2014

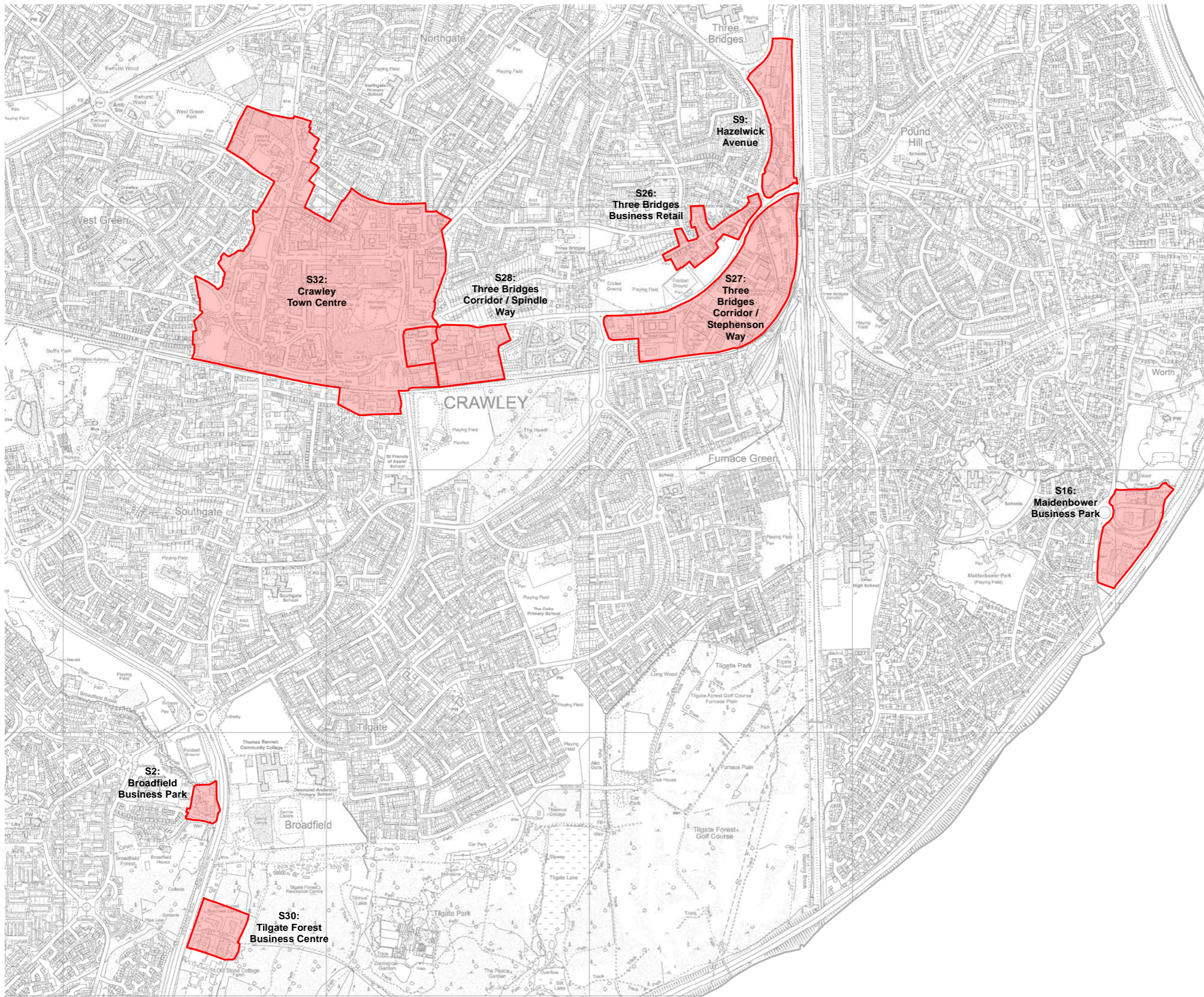
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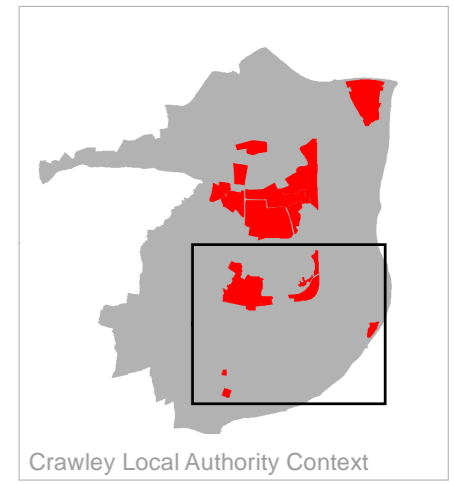
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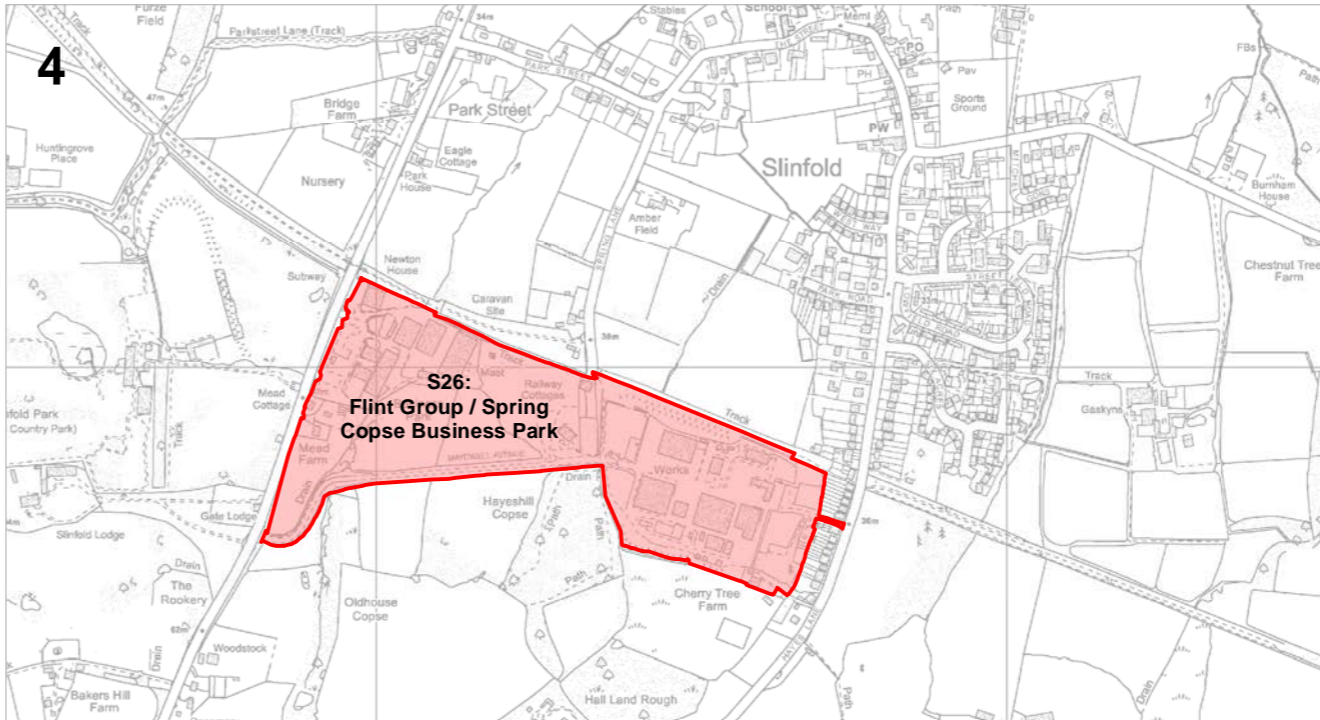
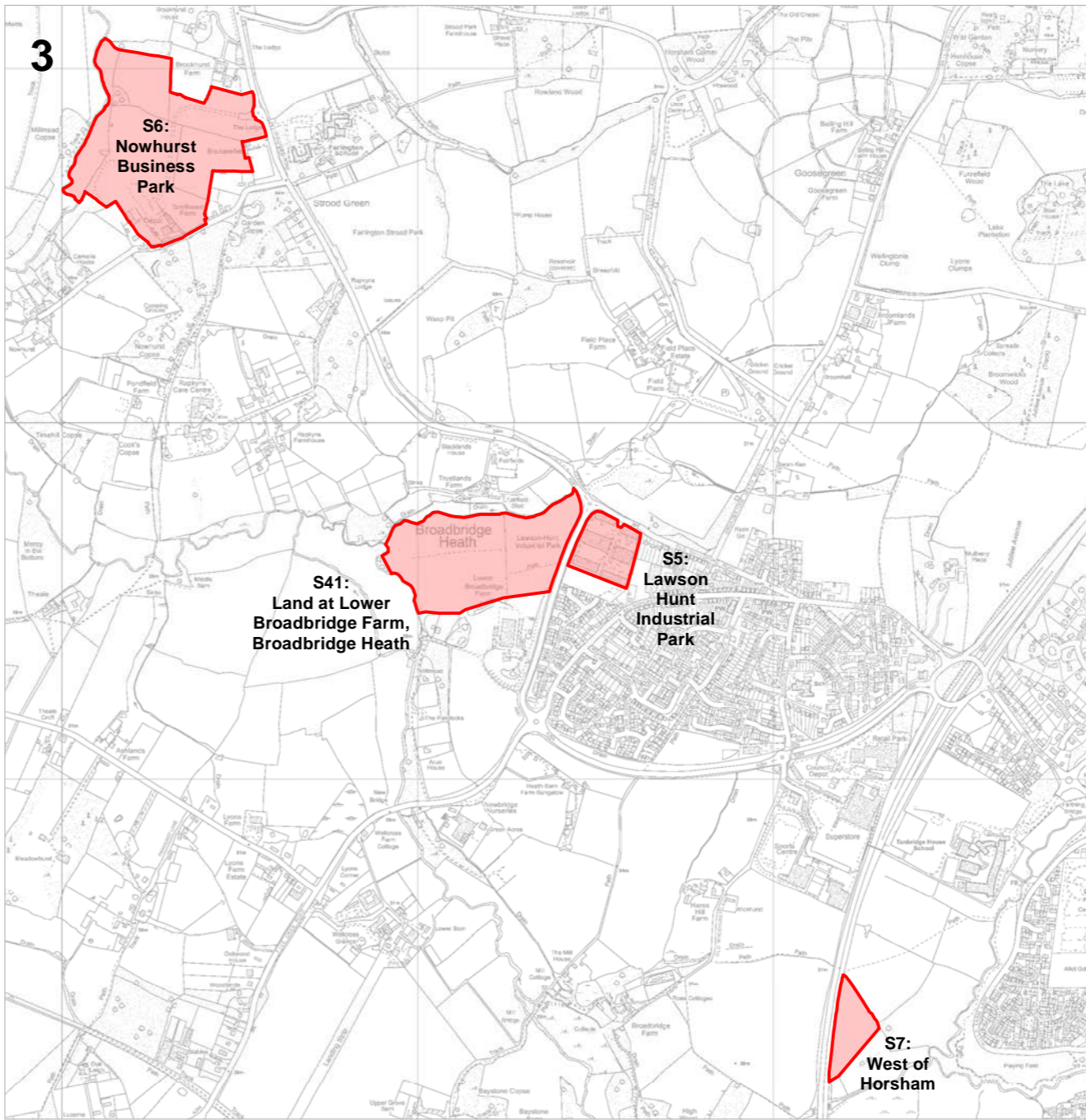
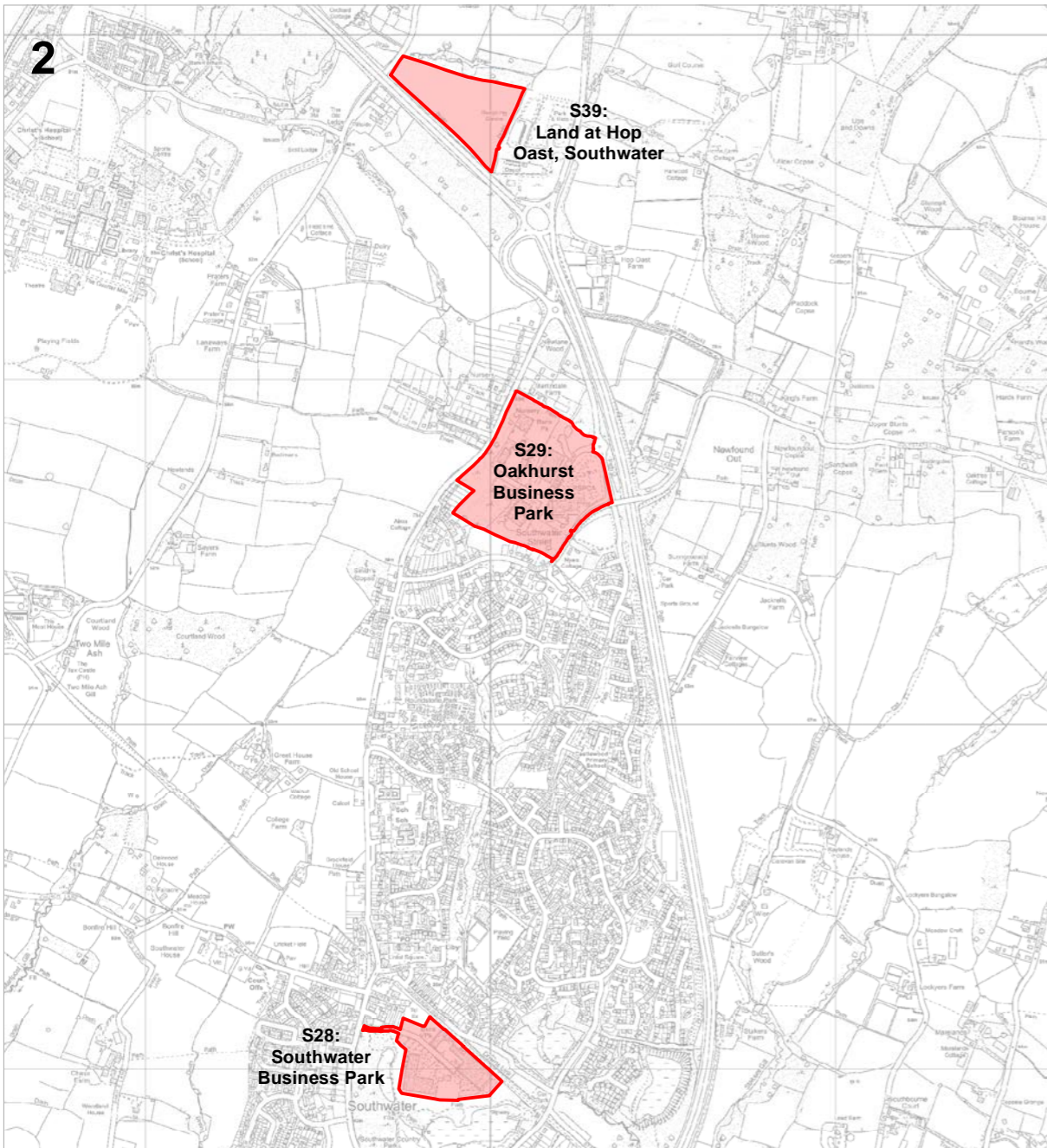
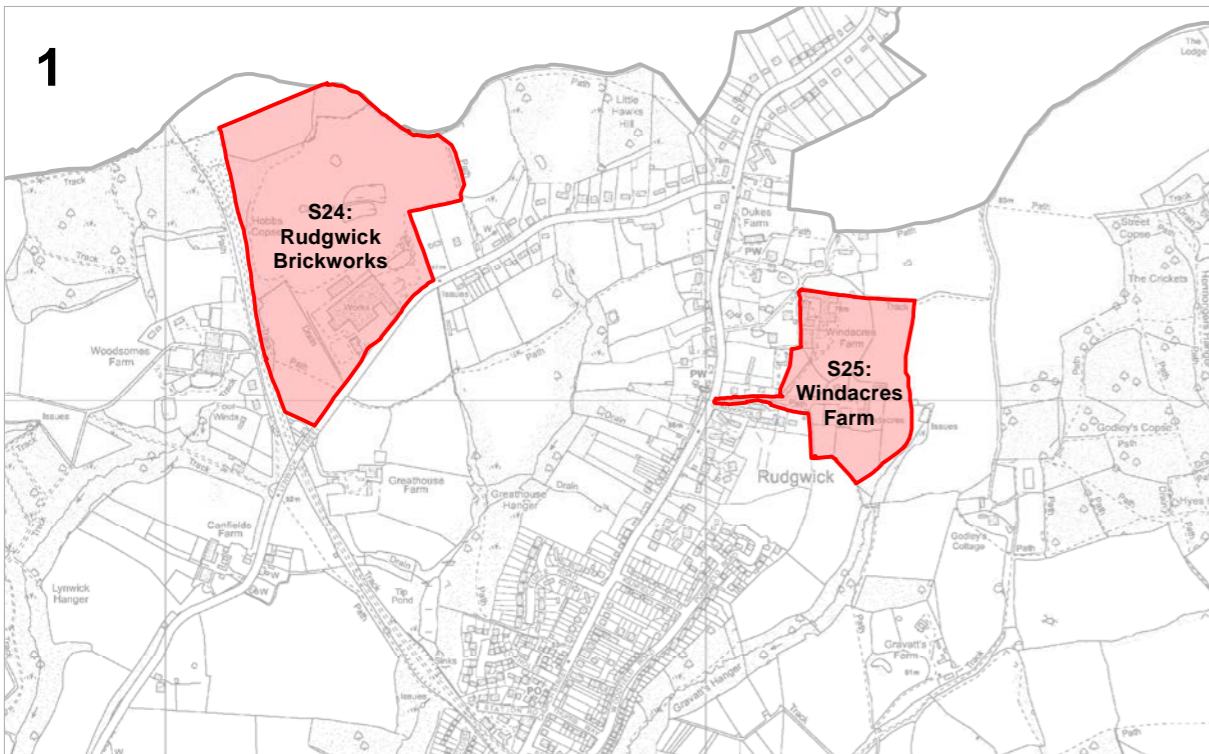
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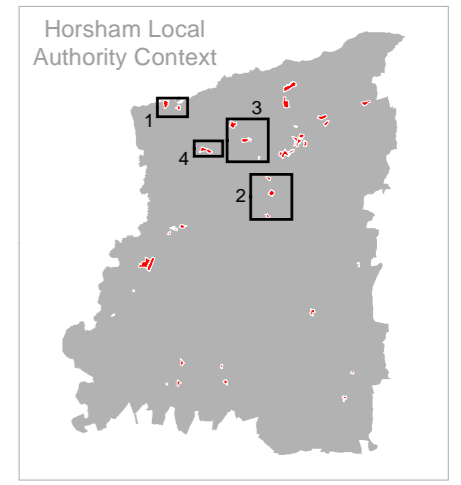


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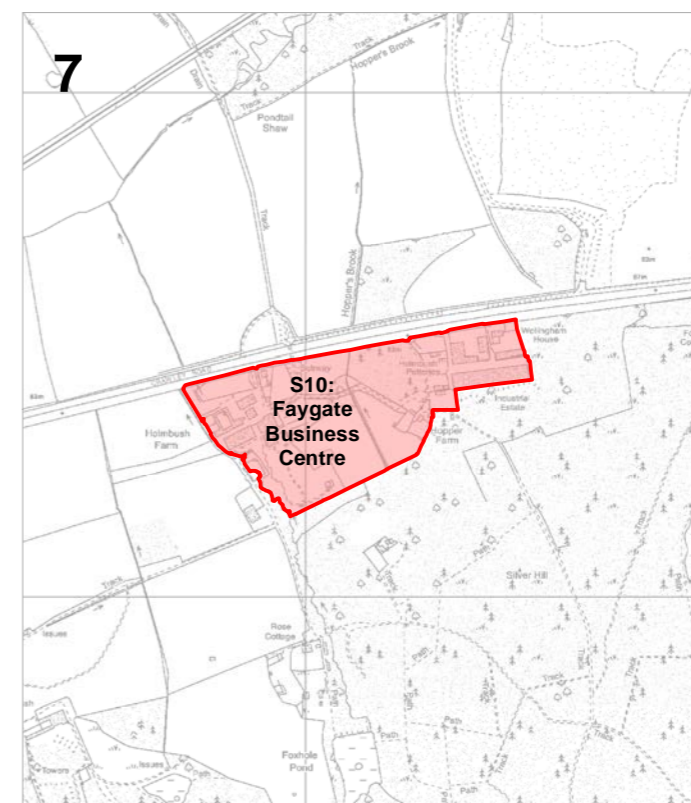
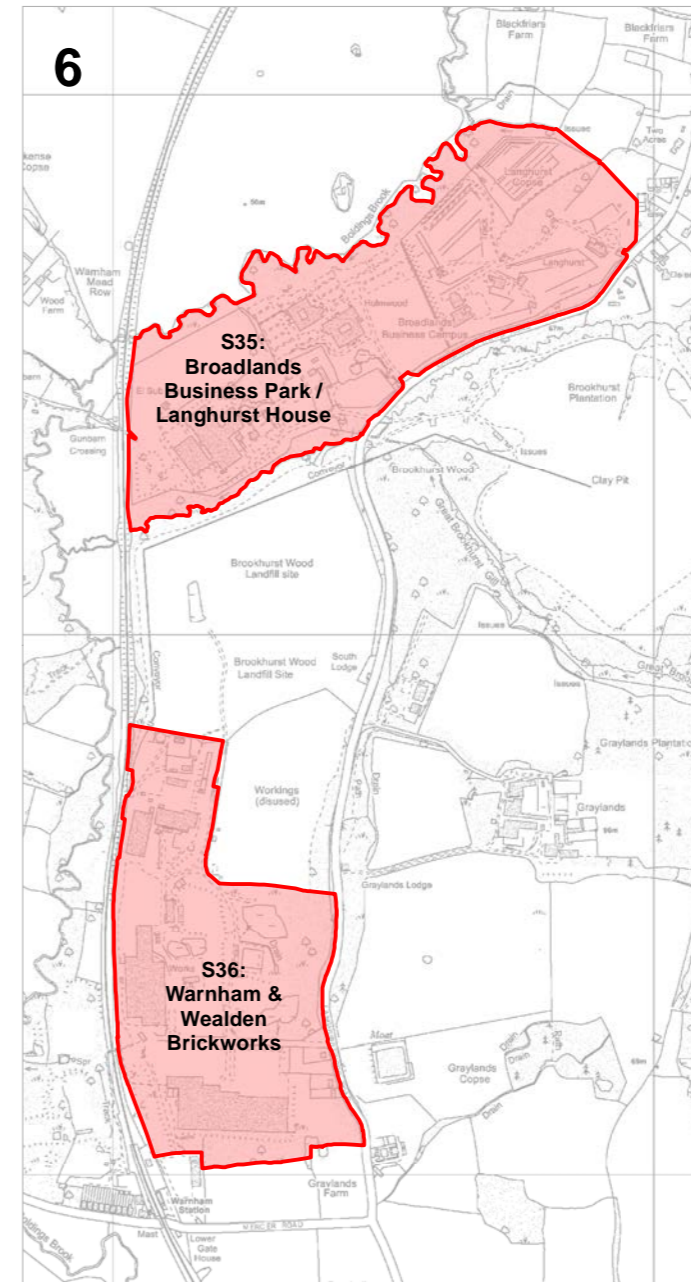
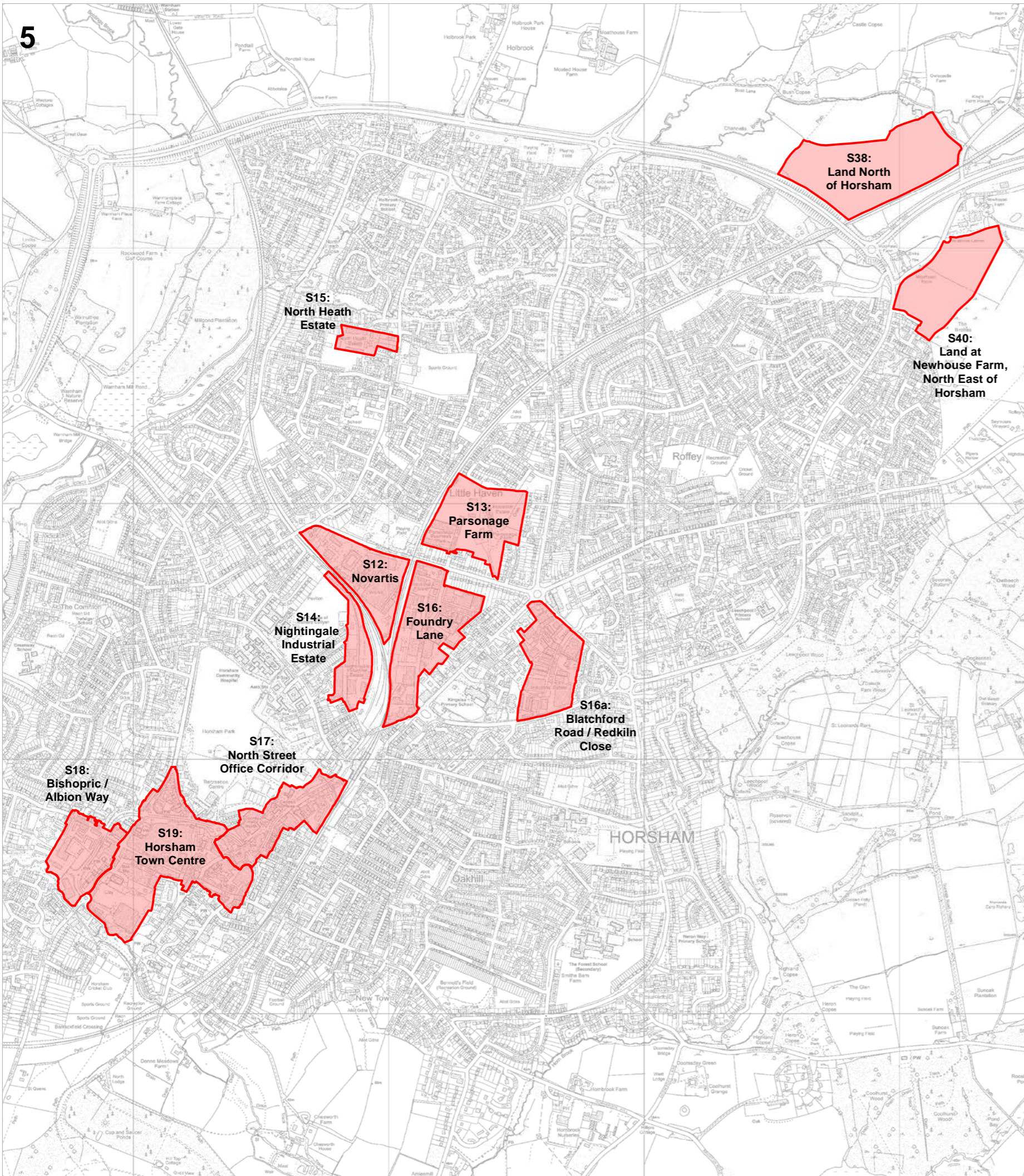
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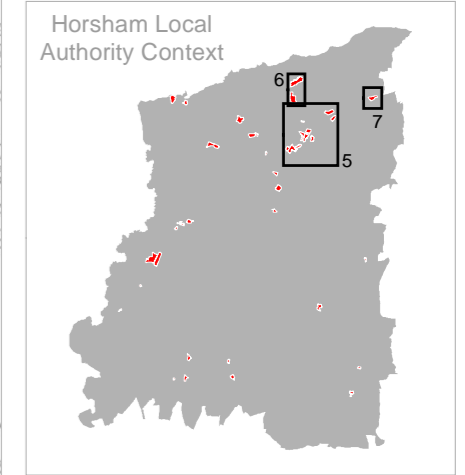
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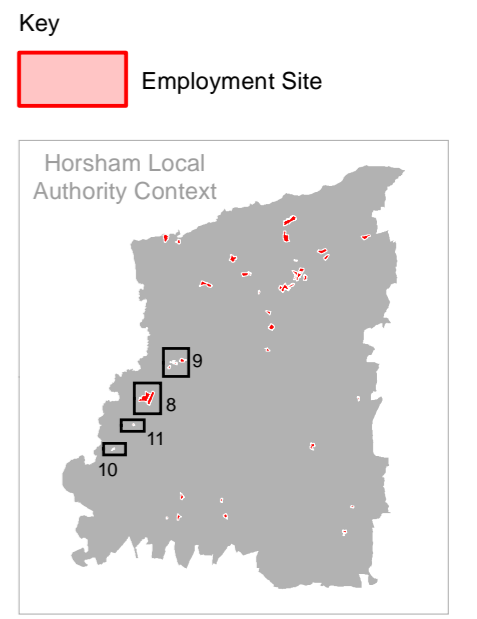
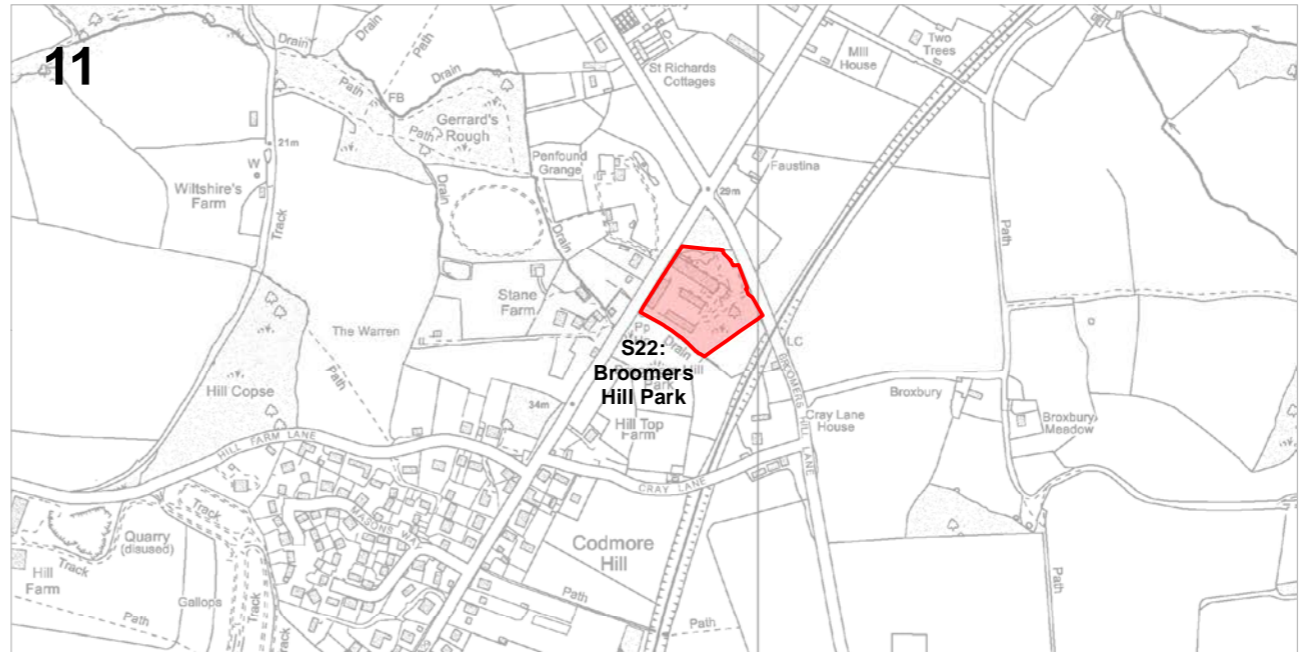
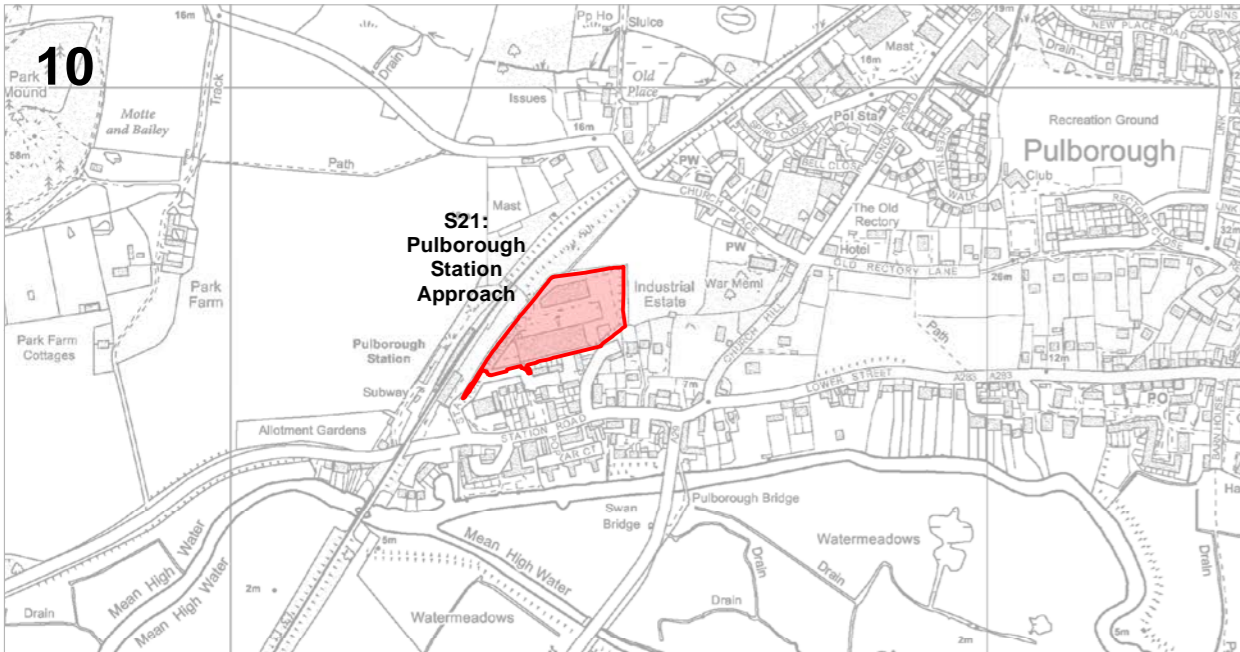
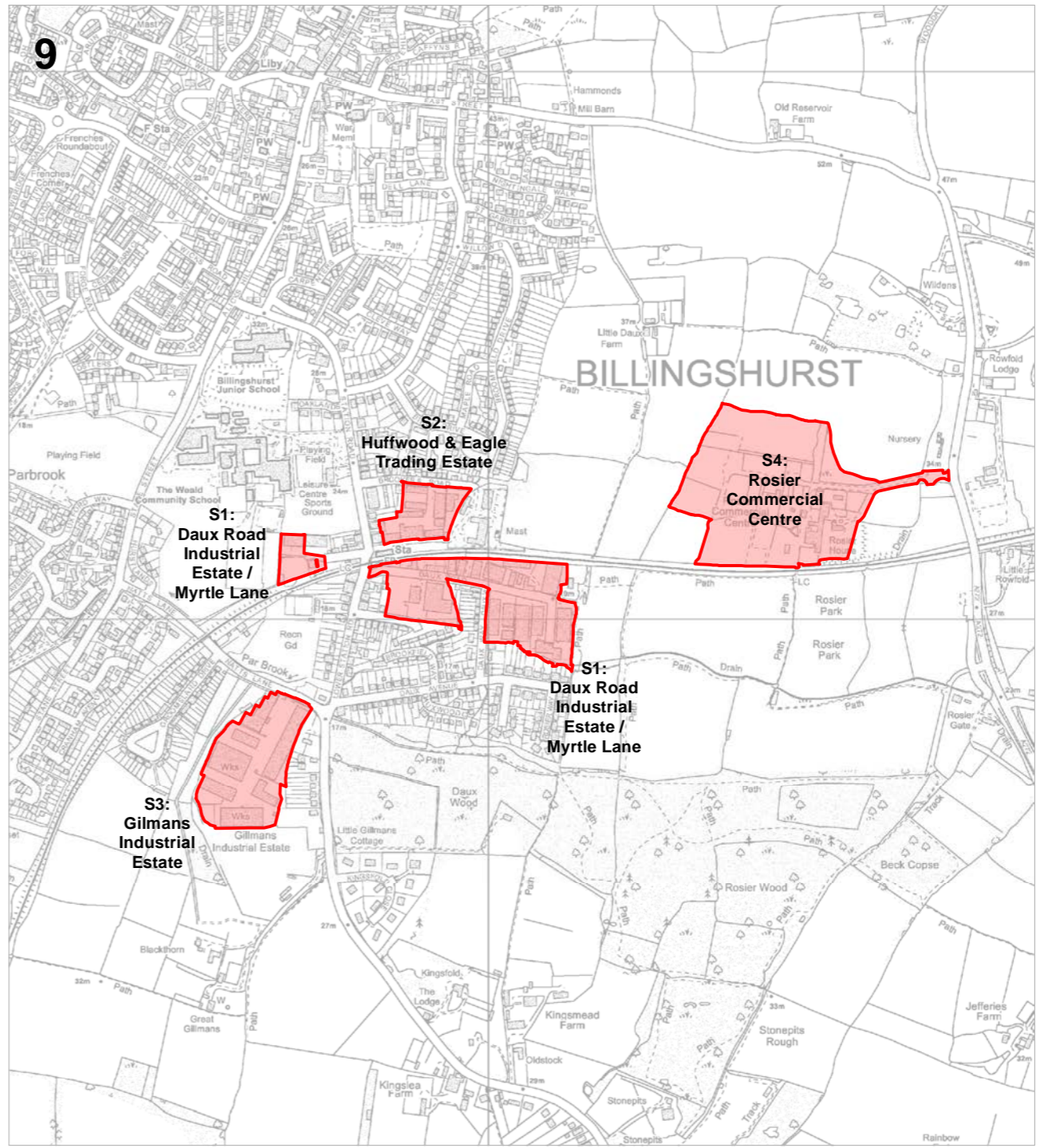
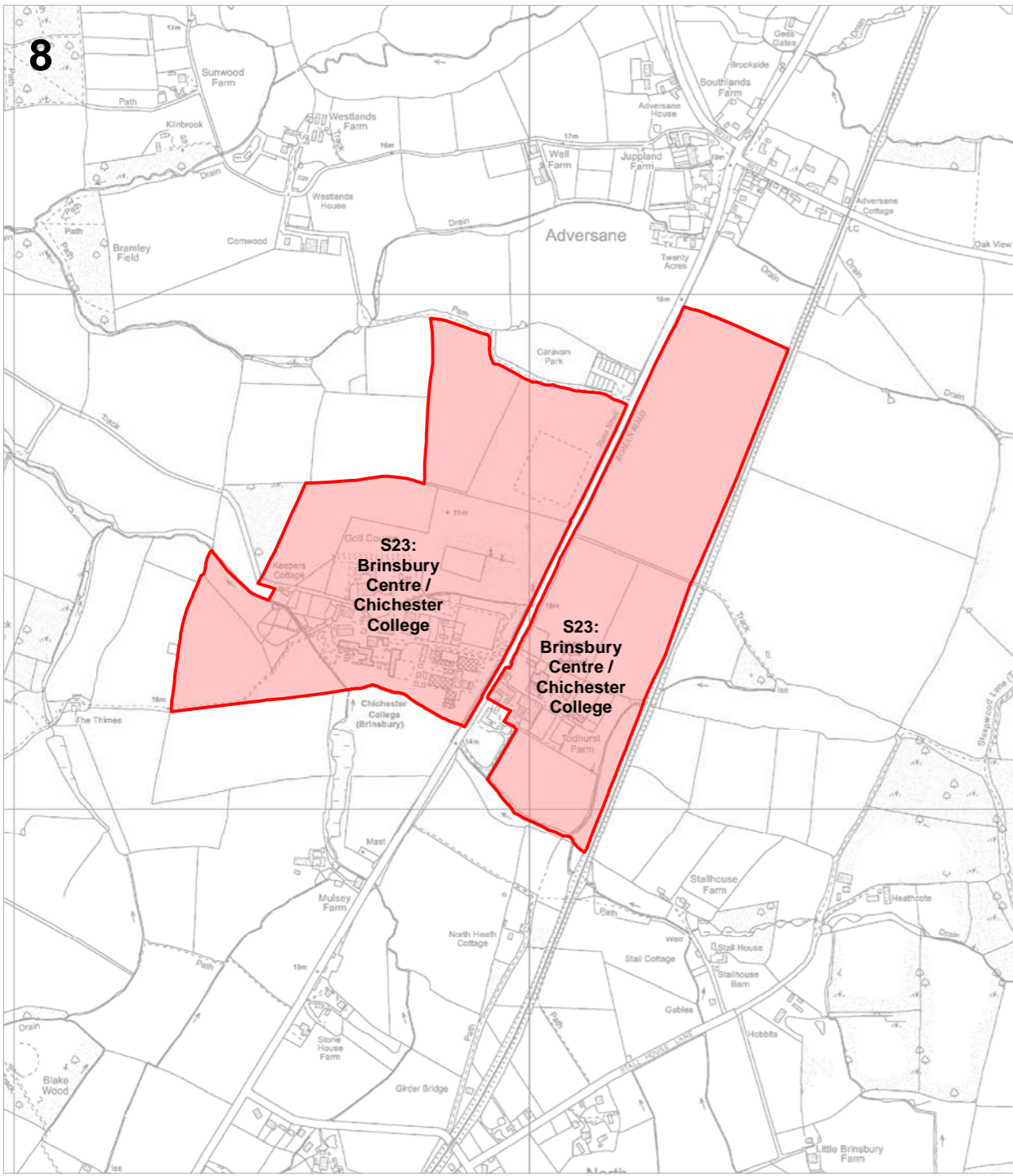
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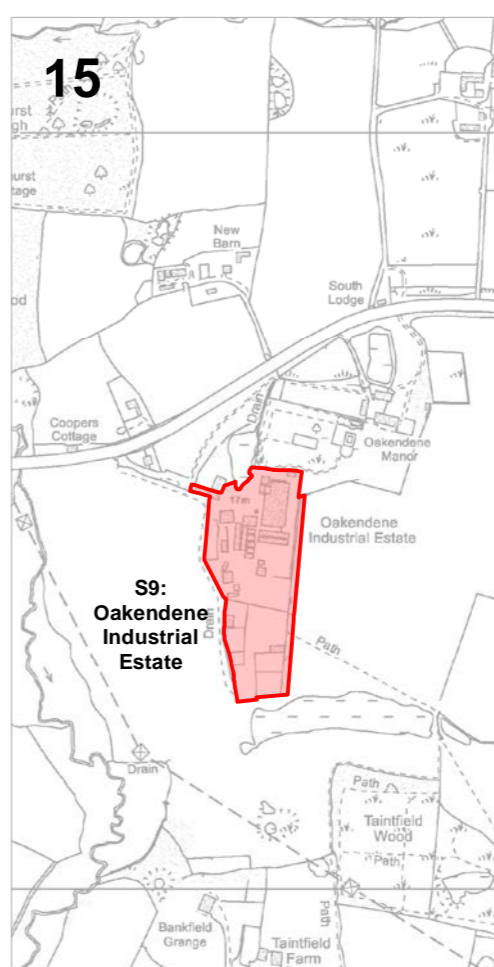
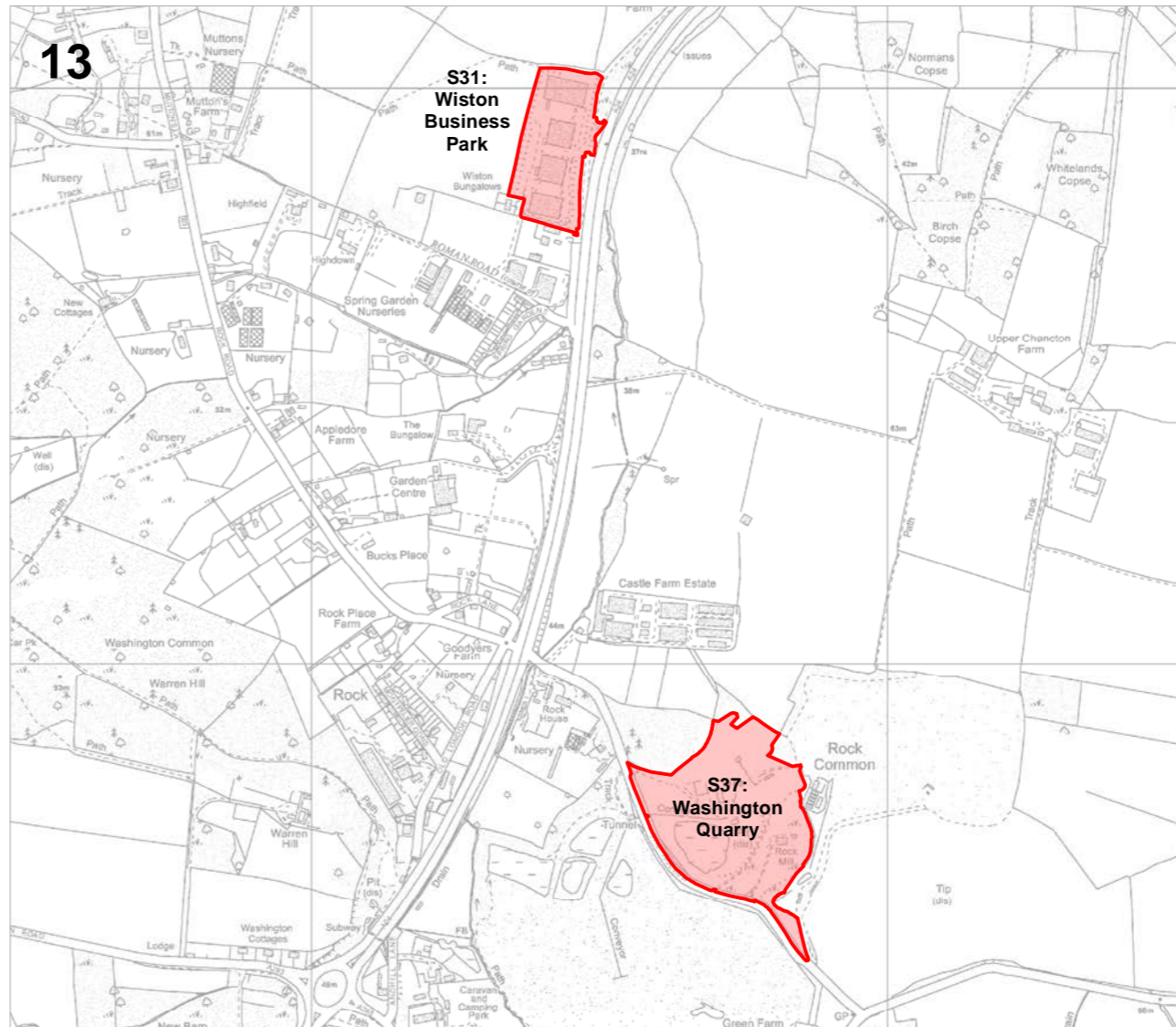
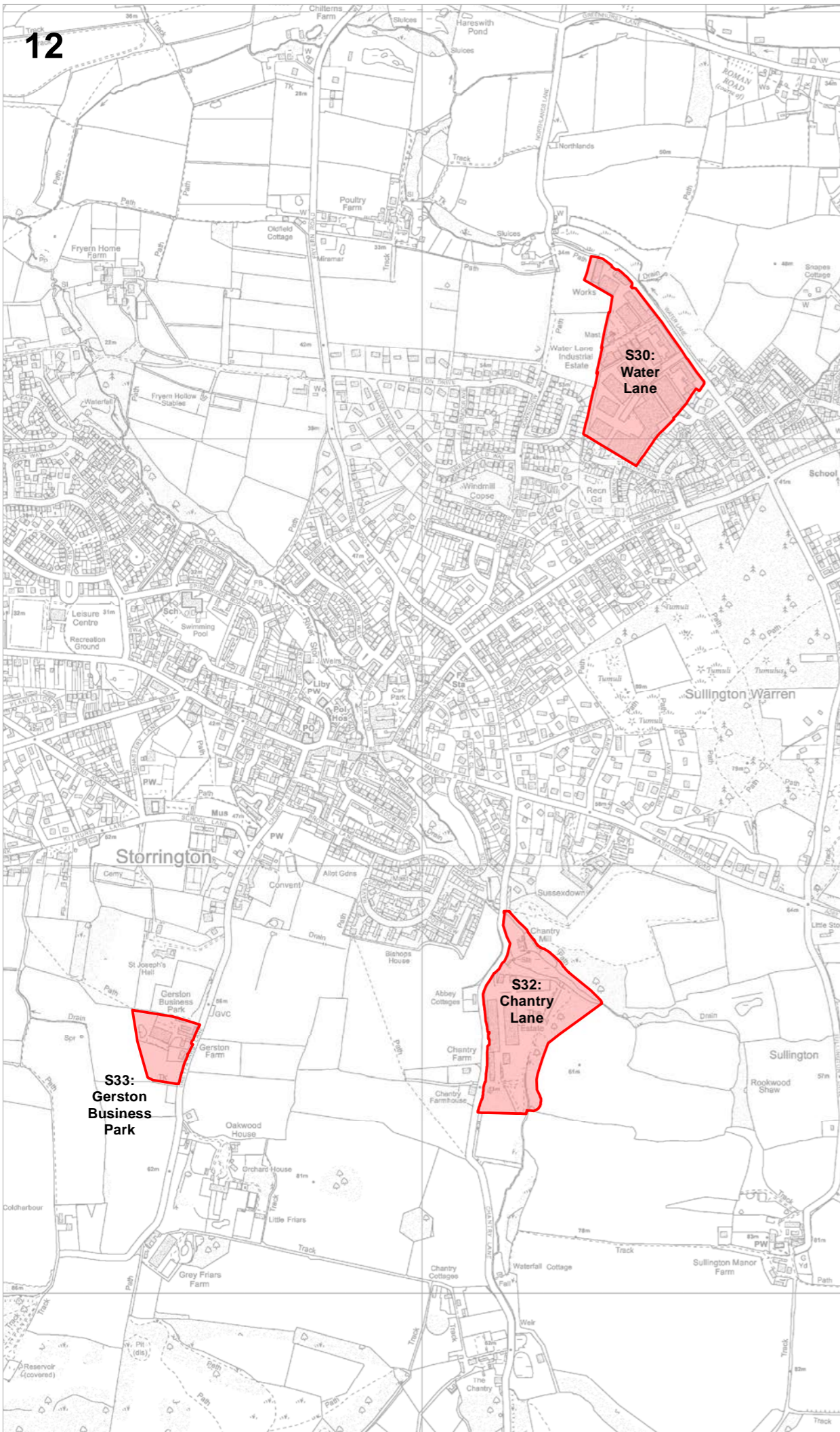
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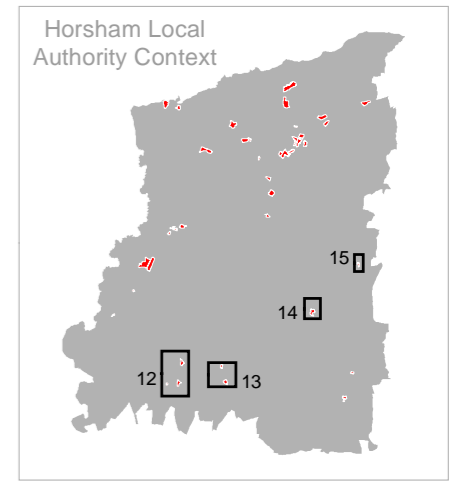
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Employment Site



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Date 23.04.2014

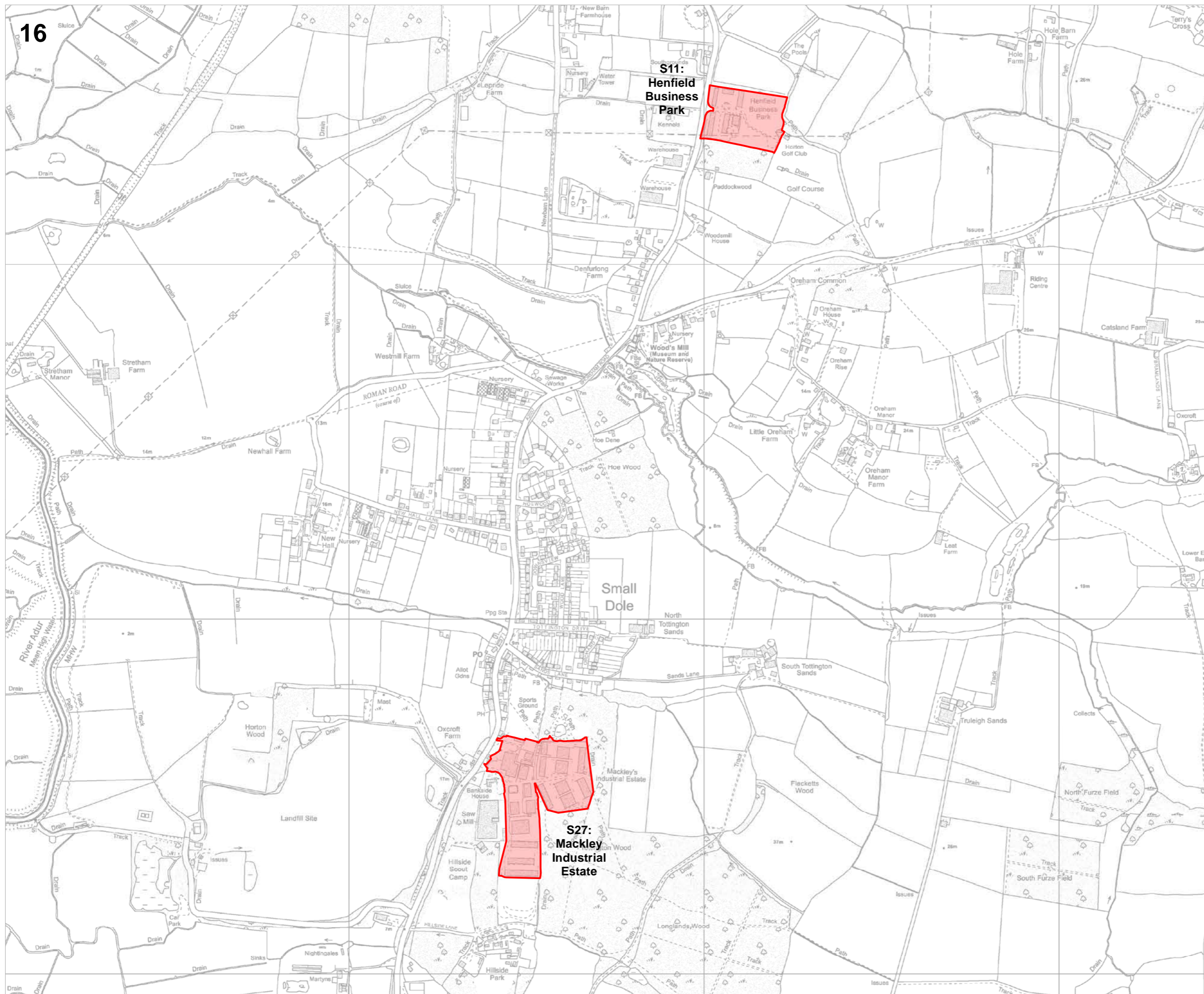
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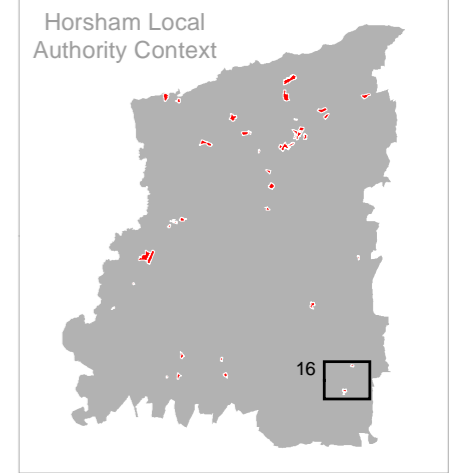
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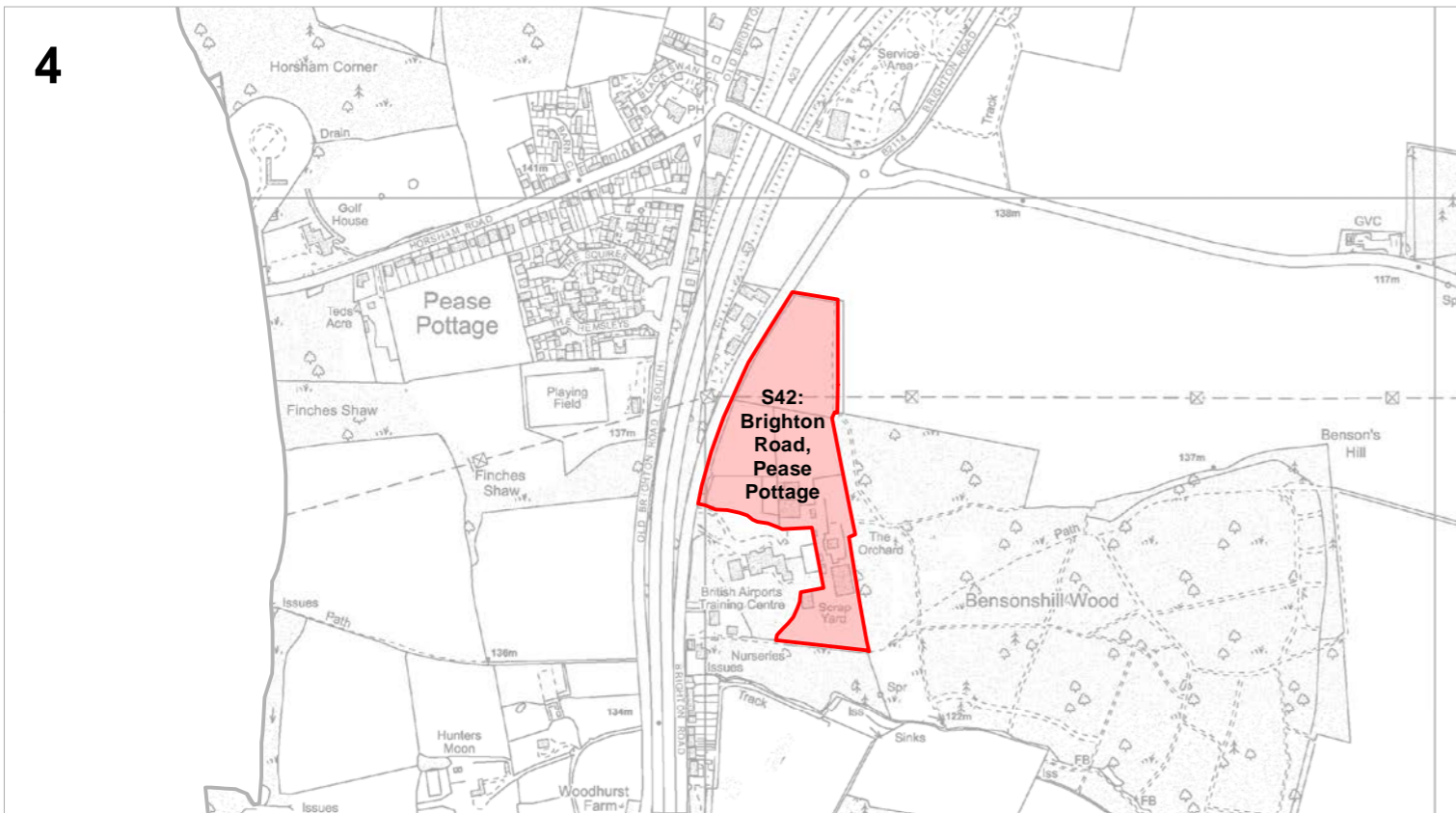
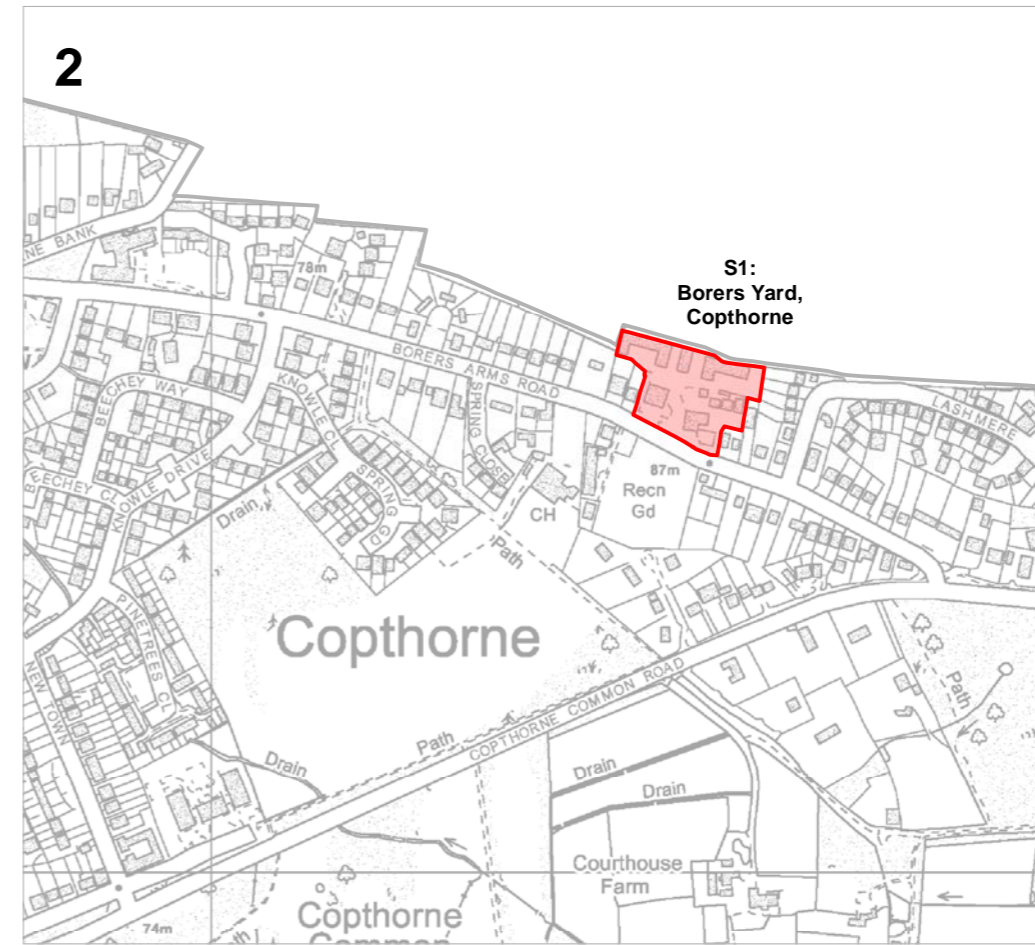
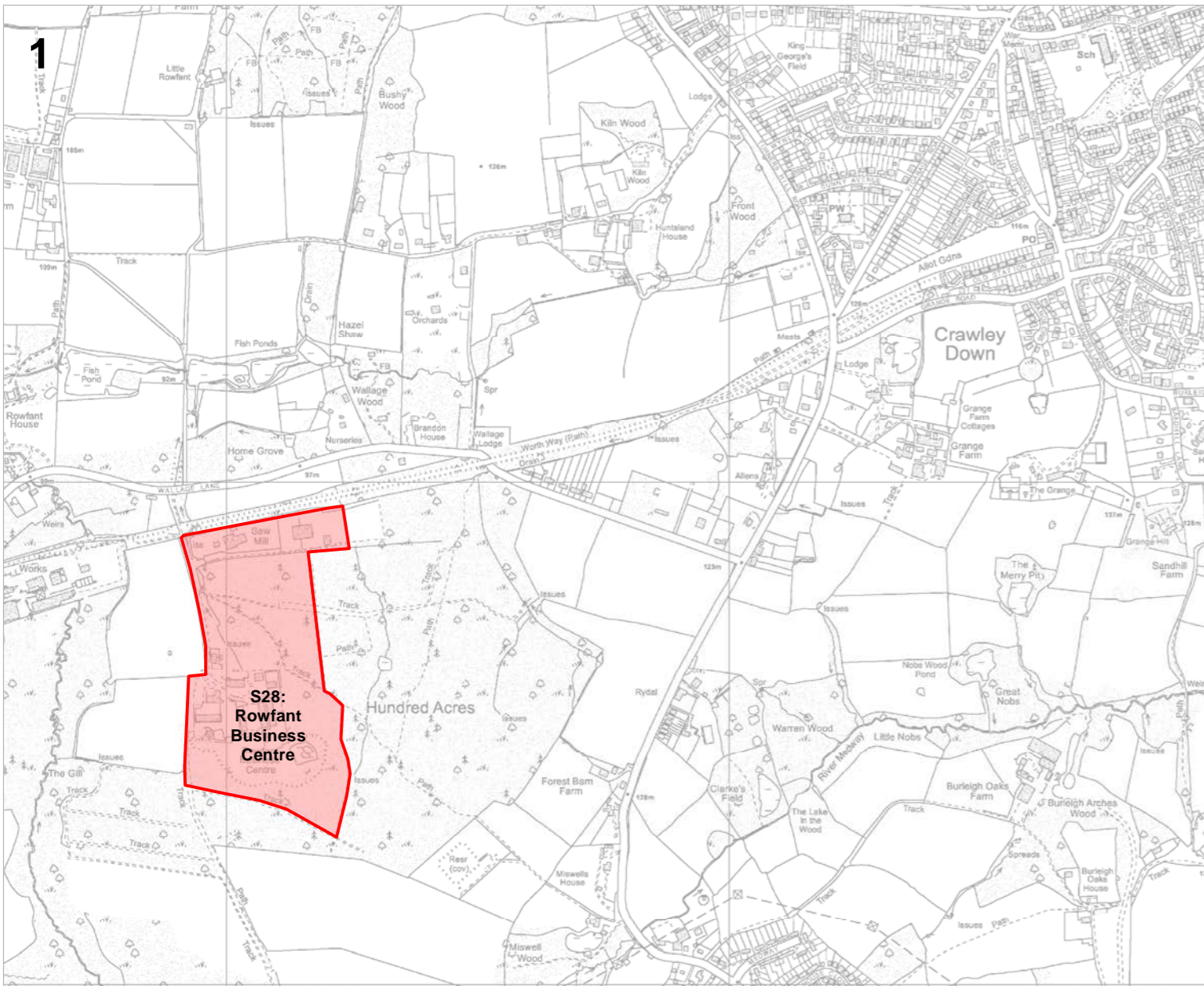
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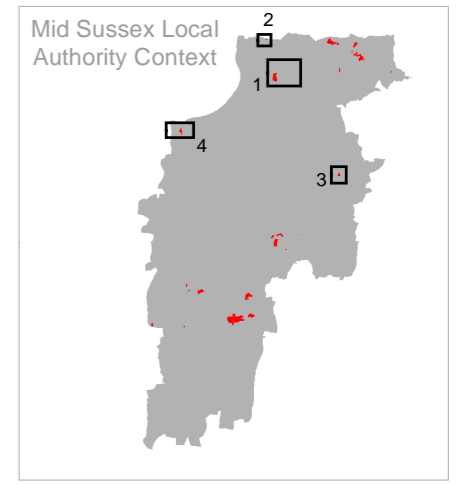
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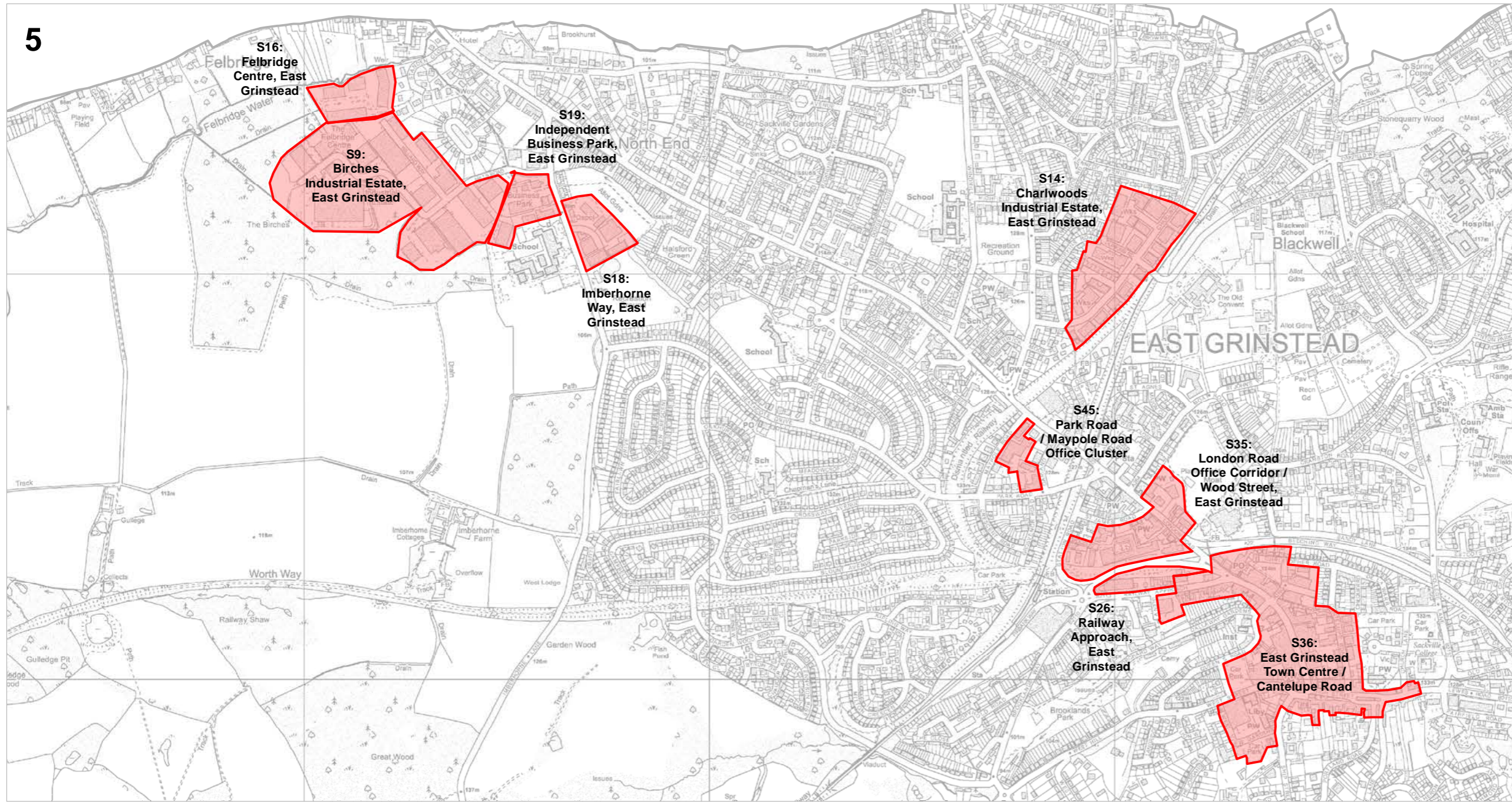
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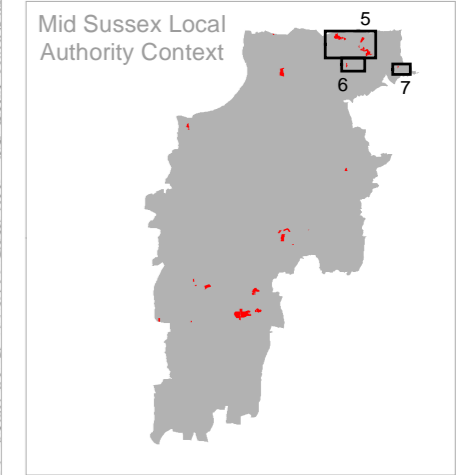
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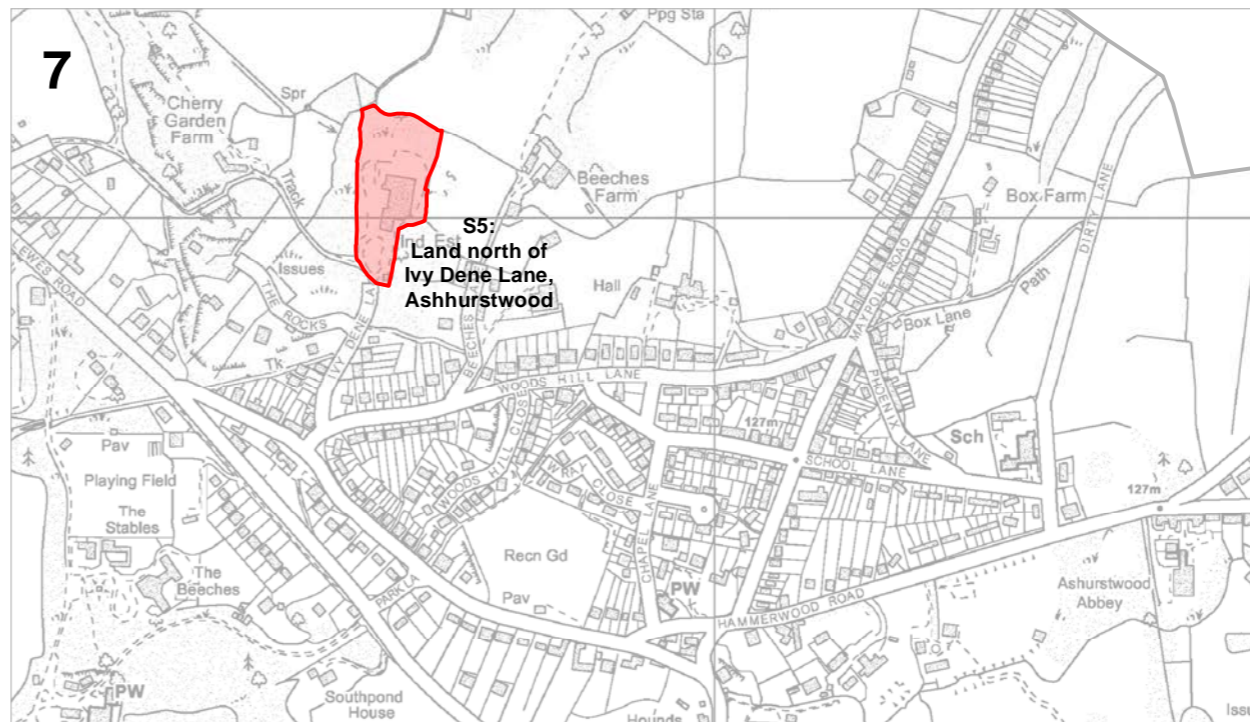
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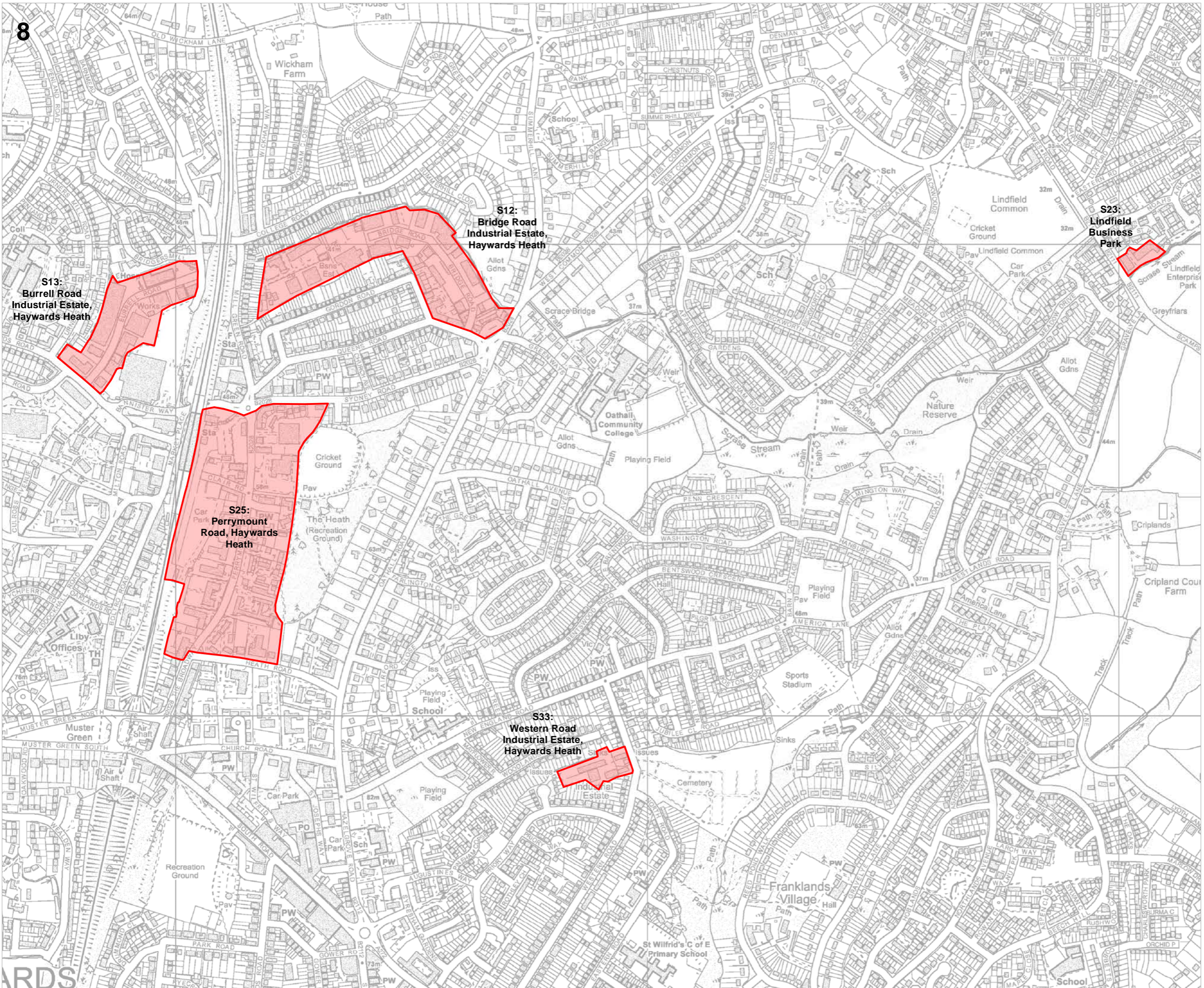
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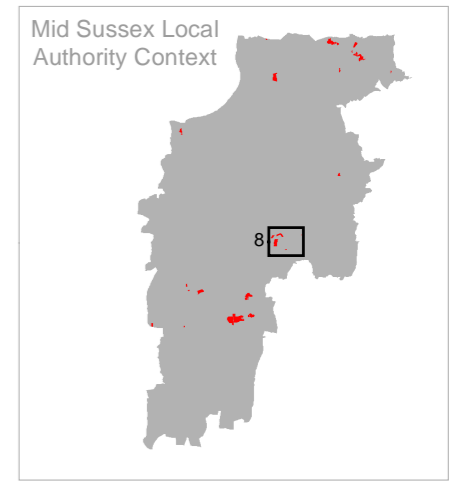
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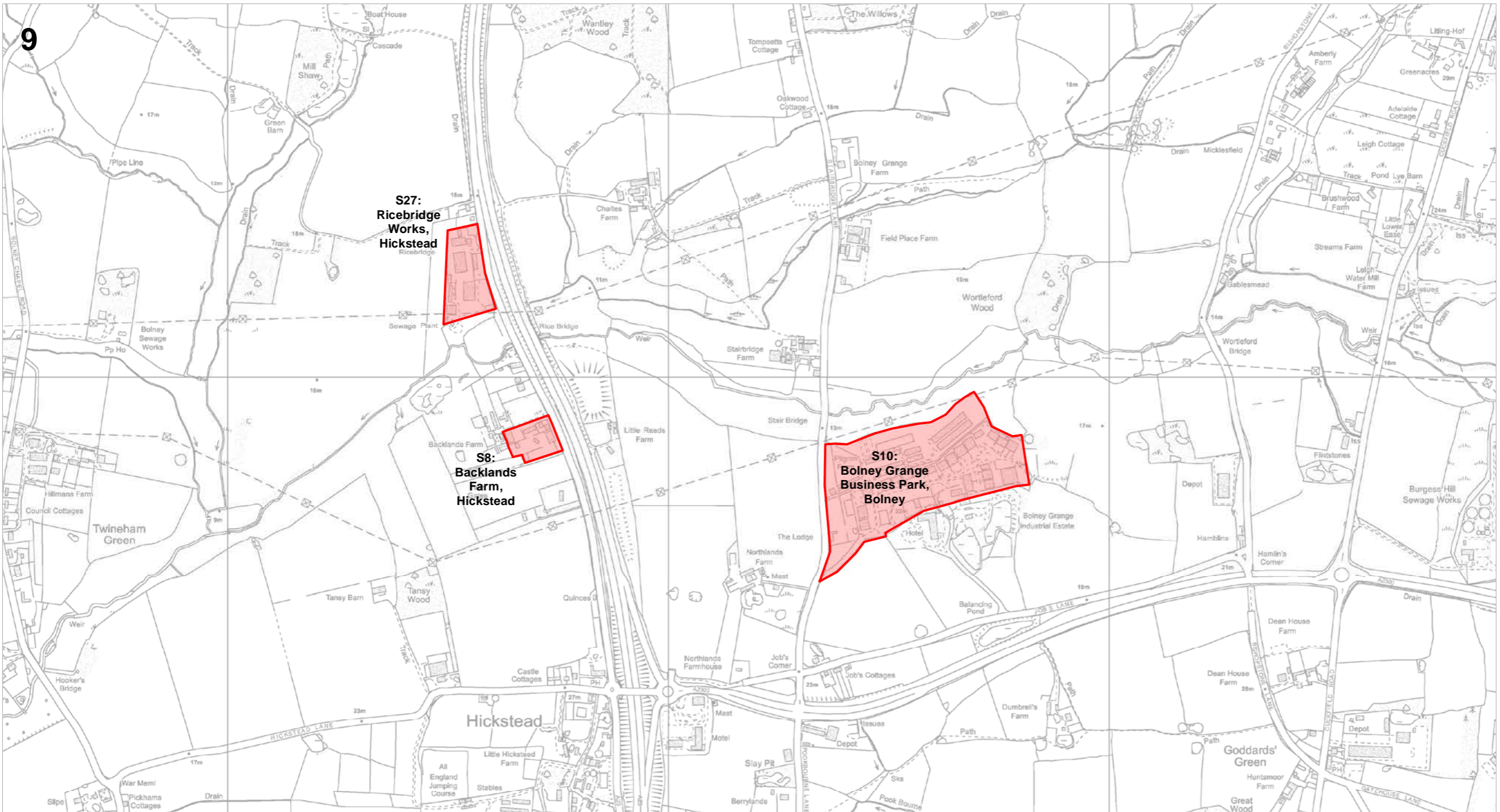
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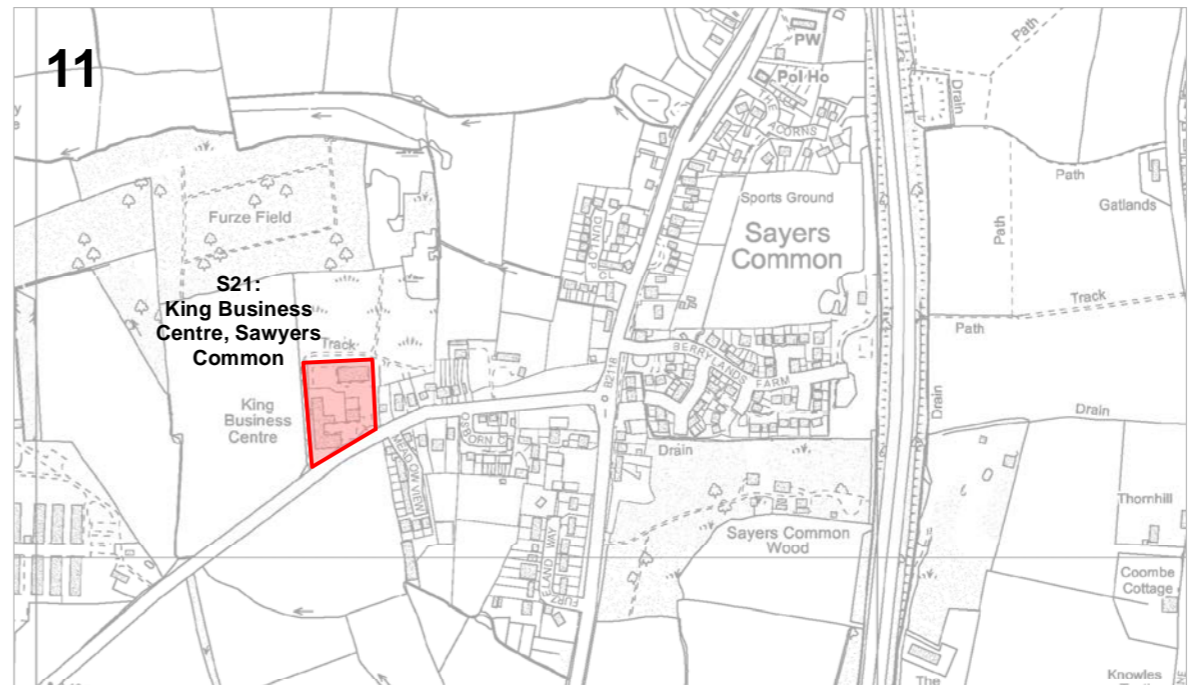
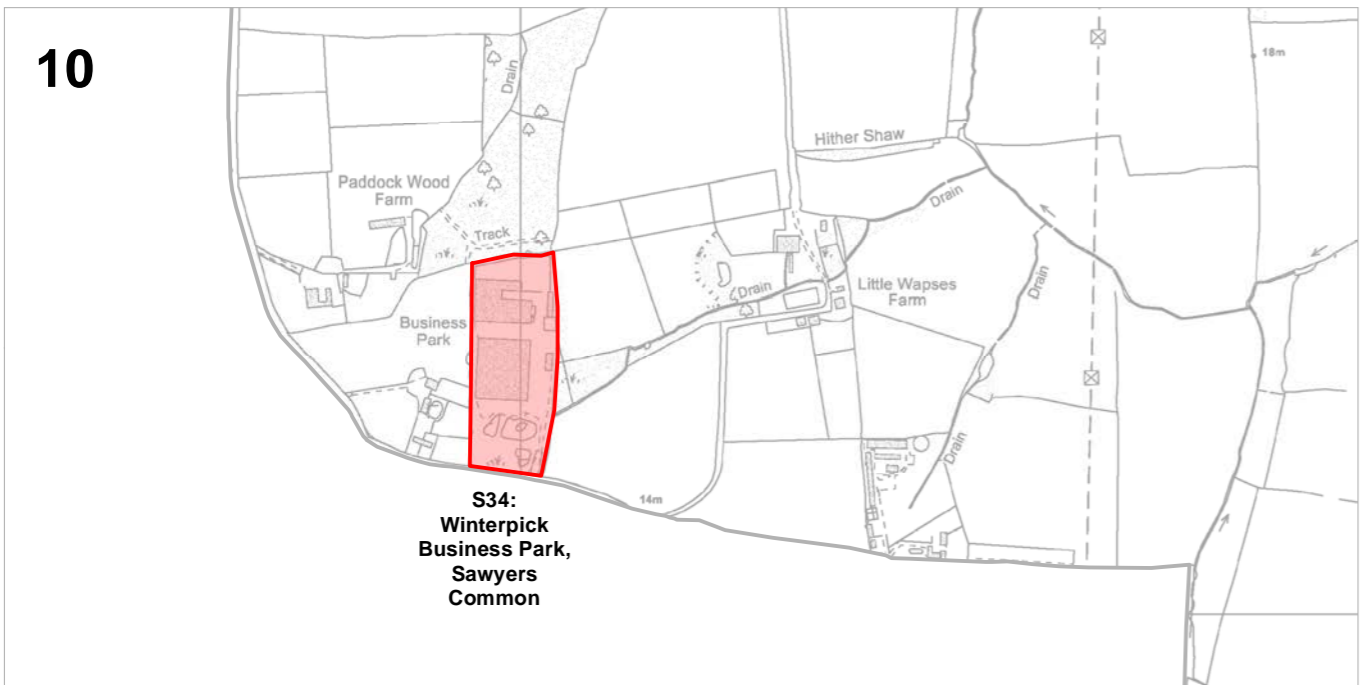
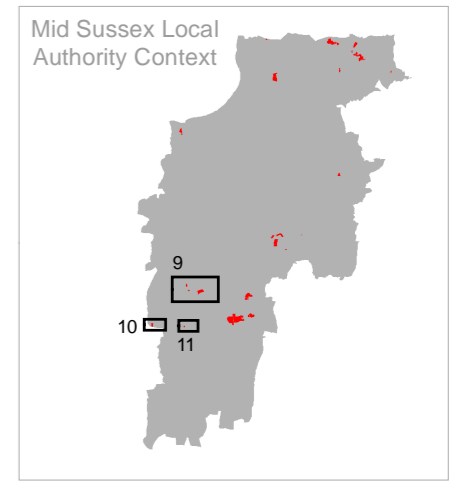
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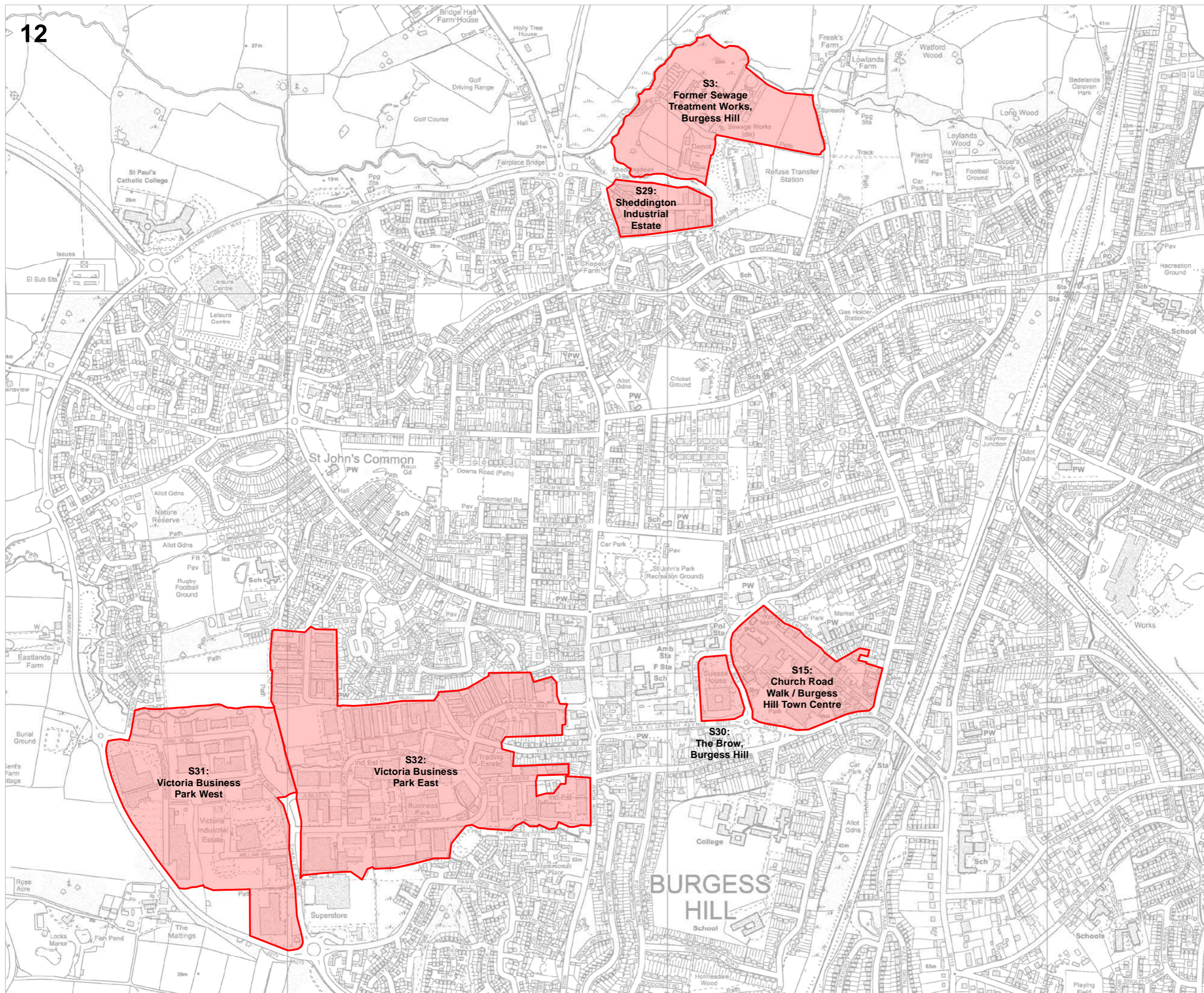
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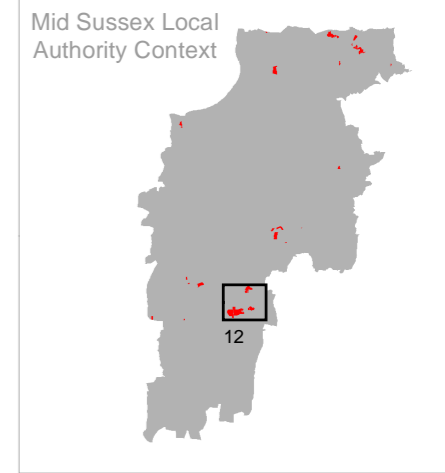
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Appendix 5 Site Assessments

Crawley

Site Reference	Site Name	Total Area (ha)	Estimated Net Developable Area (ha)	Site Status	Assessment Criteria							TOTAL SCORE (/30)	Future Development Potential				General Comments
					Strategic Access	Local Access	Proximity to Labour and Services	Compatibility of Adjoining Uses	Development & Environmental Constraints	Market Attractiveness	Planning Factors		Barriers to Delivery	Timescale for Delivery	Potential Uses		
2	Broadfield Business Park	1.4	0.0	Unallocated	4	4	4	3	3	4	22	Adjoins Historic Gardens (south). Area of flood risk.	None obvious but no undeveloped plots.	No scope for redevelopment in the medium term	B1a	Fairly modern office development with good strategic access to the A23 and M23. Limited local public transport. No evidence of vacancy on site.	
4	Gatwick Road (South)	15.8	3.6	Part Employment Area / Part Manor Royal Buffer Zone	4	3	3	4	3	3	20	Partly designated Employment Area, partly covered by Manor Royal Buffer Zone.	No obvious barriers to delivery of the vacant plot.	Part of site available for redevelopment in short term	B1a, B1b, B1c, B2, B8	This site spans both sides of Gatwick Road and includes a number of small estates within the Buffer Zone comprising a range of employment uses. The former Thales site west of Gatwick Road is within the employment allocation and has been cleared for redevelopment. It is largely occupied and has no obvious development constraints, with the exception of the Buffer Zone which primarily seeks B1 uses.	
5	Land between London Road and Gatwick Road	83.9	15.0	Employment Area	4	3	3	4	4	4	22	Designated Employment Area. Small flood risk area at eastern end of site.	No obvious barriers to delivery of the vacant plots.	Redevelopment of individual vacant plots possible in the medium term	B1a, B1b, B1c, B2, B8	The site makes up a large proportion of Manor Royal and comprises a mix of buildings including fairly modern office buildings of varying sizes, such as the Thales complex. Area has structured layout and higher end occupiers when compared to other parts of Manor Royal. There is some limited vacancy amongst the older industrial units, but there remains a couple of vacant sites suitable for redevelopment.	
7	Gatwick Green	64.2	64.2	Land within safeguarding zone / outside built up area	4	2	3	3	2	3	17	Land within safeguarding zone / outside built up area	None obvious.	Short/medium term (subject to safeguarding)	B1a, B1b, B1c, B2, B8	A greenfield site east of Gatwick Airport. No immediate existing access to M23/A23 but potentially good strategic location, limited public transport access. Development constrained by safeguarding zone designation.	
9	Hazelwick Avenue	6.3	0.0	Unallocated	4	4	4	4	2	4	22	Area of flood risk.	None obvious but no undeveloped plots.	No scope for redevelopment in the medium term	B1a, B1b	This area runs parallel to the railway line, north of the Three Bridges Corridor. Good strategic access to M23/A23 and local access to the town centre and train station. There are no undeveloped plots and the site is physically constrained. Site currently occupied by EDF, Network Rail and UK Power Networks. Footpath and watercourse run between existing office buildings and railway line.	
13	Land at Jersey Farm	15.7	15.7	Land within safeguarding zone / outside built up area	3	3	3	4	2	3	18	Land within safeguarding zone / outside built up area	None obvious.	Short/medium term (subject to safeguarding)	B1a, B1b, B1c, B2, B8	A countryside site immediately west of Manor Royal and County Oak Way. No immediate existing access to M23/A23 but potentially good strategic location with existing estate road linking to the site. Development constrained by safeguarding zone designation.	
15	Lowfield Heath	18.3	0.0	Unallocated	4	3	2	4	3	3	19	Small flood risk area at eastern end of site. Gatwick Airport Boundary immediately adjacent to north.	No obvious barriers to delivery but limited undeveloped plots.	Short/medium term	B1a, B1b, B1c, B8	Closely situated to Gatwick Airport and associated gyratory highway network. Internal road layouts constrained, on-street parking and limited turning space. Mix of lower grade light industrial units, hotel and church in a secondary employment location, outside of urban area.	
16	Maidenbower Business Park	6.3	0.0	Unallocated	5	4	4	4	4	4	25	Site of Nature Conservation Importance, Archaeologically Sensitive Area and small area of flood risk immediately to north of site.	None obvious but final vacant plot currently under construction.	Short/medium term	B1a, B1c	This site is in a very useful strategic location in close proximity to the M23. It is largely developed with offices, car dealership and light industry / service units to the rear. Good internal road layout and parking. The final vacant plot is currently under construction. The site was designated as an employment site in the Local Plan but was not rolled forward into the Core Strategy.	
18	Fleming Way	48.1	7.5	Employment Area	4	3	3	5	4	4	23	Designated Employment Area.	None obvious.	Short/medium term	B1a, B1b, B1c, B2, B8	Northern section of overarching Manor Royal area. Larger stock of units, generally more modern with low vacancy. Watercourse runs north-south through the site. Good strategic access and a number of plots to the north available for development.	
18a	County Oak	23.3	5.0	Employment Area	4	3	4	4	4	3	22	Designated Employment Area.	None obvious.	Short/medium term	B1b, B1c, B2, B8	Westward expansion of the Manor Royal employment area. Large proportion of bulky goods retail established on the site, coupled with extant permission for a foodstore with mixed quality employment uses and vacant units beyond. Constrained highway layout and busy retail destination.	

Site Reference	Site Name	Total Area (ha)	Estimated Net Developable Area (ha)	Site Status	Assessment Criteria							TOTAL SCORE (/ 30)	Future Development Potential				General Comments
					Strategic Access	Local Access	Proximity to Labour and Services	Compatibility of Adjoining Uses	Development & Environmental Constraints	Market Attractiveness	Planning Factors		Barriers to Delivery	Timescale for Delivery	Potential Uses		
19	Gatwick Road (North)	50.2	7.5	Employment Area	4	3	3	5	4	3	22	Designated Employment Area.	None obvious but no undeveloped plots.	No scope for redevelopment in the medium term	B1a, B1c, B2, B8	Range of uses within site which makes up the northeastern area of Manor Royal. Bound by countryside to east and west, otherwise contained in individual estates and internal roads. Good strategic access but overall lower quality stock with some vacancies e.g. G23 offices on Gatwick Road.	
19a	City Place	17.2	1.5	Employment Area	4	4	3	5	4	5	25	Designated Employment Area.	None obvious.	Short/medium term	B1a, B1b, B8	Self contained site incorporating refurbished and new modern office accommodation, good internal layout, parking and landscaping. Strategic location with major corporate occupiers e.g. CAA, Nestle. Some scope for further development within this site.	
25	Southways	14.2	14.2	Land within safeguarding zone / outside built up area	4	3	3	3	2	3	18	Land within safeguarding zone / outside built up area	None obvious.	Short/medium term (subject to safeguarding)	B1a, B1b, B1c, B8	A countryside site between Manor Royal and Gatwick Airport. Single existing access to A23. Development constrained by safeguarding zone designation.	
26	Three Bridges Business Retail	3.7	0.0	Unallocated	3	3	5	3	3	2	19	Area of flood risk.	None obvious but no undeveloped plots.	No scope for redevelopment in the medium term	B1a	A mixed office/retail and service area along Three Bridges Road. Self contained office units situated perpendicular via estate roads. Mix of A1-A5, B1a and D1 uses evident. Average strategic and local access but prominent urban location. Proportion of vacant units show limited market confidence.	
27	Three Bridges Corridor / Stephenson Way	19.1	1.0	Three Bridges Corridor	3	3	5	4	3	3	21	Designated employment / mixed-use area. Area of flood risk.	No obvious barriers to delivery of the vacant plot.	Single plot available for redevelopment in short term	B1a, B1c, B8	Largest tranche of the Three Bridges Corridor employment / mixed-use area. Estate road layout with a mix of lower grade employment, light storage, distribution, trade and car showroom uses. Good strategic access and edge of urban area. There are some vacant office units and a vacant plot to the southwest of the site. Large substation within site.	
28	Three Bridges Corridor / Spindle Way	7.3	0.0	Three Bridges Corridor	3	3	5	4	4	4	23	Designated employment / mixed-use area	None obvious but no undeveloped plots.	No scope for redevelopment in the medium term	B1a, B1c, B8	Second smaller tranche of the Three Bridges Corridor employment / mixed-use area, nearer to the town centre. Estate road layout with a mix of lower grade employment, light storage, automotive and trade uses. Good access to highway network and urban area. Limited vacancy and evidence of recent new development.	
30	Tilgate Forest Business Centre	3.5	0.0	Unallocated	4	4	3	4	4	4	23	N/A	None obvious but no undeveloped plots.	No scope for redevelopment in the medium term	B1a, B1b, B8	The site comprises a cluster of office uses including KPMG with limited vacant units. This site is surrounded by countryside/woodland and varies in topography. The site is fully developed, has good strategic access with estate road and suitable parking. Limited public transport access and on the edge of the urban area.	
32	Crawley Town Centre	67.0	0.0	Designated Town Centre which comprises Main Shopping Area, Strategic Housing Development Opportunity Sites, Additional Mixed Use Development Opportunity Sites and a Conservation Area	3	3	5	4	3	2	20	Primary location for main town centre uses e.g. offices. Conservation Area covers historic elements of town centre.	None obvious but limited undeveloped plots.	Limited scope for redevelopment in the medium term	B1a, B1c	Crawley town centre comprises a mix of retail, employment, leisure and residential uses in a concentric built form pattern. Existing office accommodation is mixed quality, some dated and largely vacant. Some examples of modern office accommodation also vacant. Strategic access is average, whilst traffic levels are high during peak periods. Good local transport and benefits from central location for access to labour and services. Some constraints with regard to the Conservation Area and heritage assets.	

Horsham

Site Reference	Site Name	Total Area (ha)	Estimated Net Developable Area (ha)	Site Status	Assessment Criteria							TOTAL SCORE (/ 30)	Future Development Potential				General Comments
					Strategic Access	Local Access	Proximity to Labour and Services	Compatibility of Adjoining Uses	Development & Environmental Constraints	Market Attractiveness	Planning Factors		Barriers to Delivery	Timescale for Delivery	Potential Uses		
1	Daux Road Industrial Estate / Myrtle Lane	4.7	0.5	Employment Protection Zone (part)	2	3	3	3	3	3	17	Designated Employment Area. Small area of flood risk at southeast of site.	None obvious but limited undeveloped plots.	No scope for redevelopment in the medium term, with exception of Myrtle Lane.	B1a, B1c, B2	Daux Road is a mixed office, manufacturing and light industrial employment allocation adjacent to railway line with residential uses to south. Mixed quality stock with dedicated access and parking. Constrained physical layout and limited area for expansion. Limited evidence of vacancy on site. Element of flood risk to south/southeast. Myrtle Lane is a separate small unallocated site and comprises some light industrial and automotive uses with one vacant plot and some vacancy.	
2	Huffwood & Eagle Trading Estate	1.2	0.0	Employment Protection Zone (part)	2	2	3	3	3	2	15	Partly designated Employment Area.	None obvious but no undeveloped plots.	No scope for redevelopment in the medium term.	B1a, B1c, B2	This site is situated north of the railway and is surrounded by residential uses. Two individual trading estates with access roads, generally low quality stock and high vacancy. Limited space to expand/redevelop and poor internal access/servicing arrangements. Eagle Estate element is not included within the employment allocation.	
3	Gilmans Industrial Estate	3.3	0.0	Employment Protection Zone	3	4	3	3	4	4	21	Designated Employment Area.	None obvious but no undeveloped plots.	No scope for redevelopment in the medium term.	B1c, B2, B8	Self-contained light industrial / storage & distribution estate served by dedicated access. Situated outside main residential area, this is an allocated employment site with some limited vacancy. Average quality stock, no undeveloped plots or immediate area for expansion.	
4	Rosier Commercial Centre	8.0	3.0	Areas outside built-up area boundary	3	3	2	4	4	3	19	Outside built-up area. Policy requires countryside protection and enhancement.	None obvious.	Short/medium term	B1a, B1b, B1c, B2, B8	Self-contained mixed employment area surrounding Rosier Fam. Dedicated access, turning and servicing space, limited public transport. Further available space for intensification but some existing vacancy. Evidence of car sales/servicing, salvage and agricultural support services.	
5	Lawson Hunt Industrial Park	2.8	0.0	Employment Protection Zone	3	3	3	4	4	4	21	Designated Employment Area.	None obvious but no undeveloped plots.	No scope for redevelopment in the medium term	B1a, B1b, B1c	Self-contained light industrial estate to the west of Broadbridge Heath. Served by dedicated local access to gated estate, this is an allocated employment site with some limited vacancy. Good quality stock, no undeveloped plots or immediate area for expansion.	
6	Nowhurst Business Park	17.9	17.9	Areas outside built-up area boundary	2	3	2	3	4	3	17	Outside built-up area. Policy requires countryside protection and enhancement.	None obvious.	Scope for development in short/medium term	B1a, B1b, B1c, B2, B8	Understand area was identified for employment development by private sector but was never brought forward. Situated outside urban area with limited strategic and local access, it is a non-allocated site in an unsustainable location. Large site with potential for a mix of uses and existing estate road. Existing salvage use within the site. Market attractiveness considered limited given lack of commercial interest.	
7	West of Horsham	2.1	2.1	Sites for housing development / mixed use	3	1	3	3	3	3	16	Identified for housing / mixed use development. Small flood risk area at southern end of site.	None obvious.	Medium to long term.	B1a, B1b, B1c, B8	Triangular-shaped countryside site adjacent to A24, west of Horsham. Strategic allocation for mixed-use / housing. No existing strategic or local access. Area of flood risk to south of site. Unknown market attractiveness, but would be suitable for office, R&D and storage/distribution if access to highway network can be facilitated.	
9	Oakdene Industrial Estate	3.0	0.5	Areas outside built-up area boundary	3	2	2	4	4	2	17	Outside built-up area. Policy requires countryside protection and enhancement.	None obvious.	Some limited scope for intensification / redevelopment in medium to long term.	B1c, B2, B8	Unallocated, self contained employment site comprising mix of dated and low quality units, some vacancy evident. Dedicated estate access road via A272 but isolated strategic location and constrained internal layout. Light industrial, automotive and ancillary agricultural uses evident. Some scope for intensification / redevelopment in medium to long term.	

Site Reference	Site Name	Total Area (ha)	Estimated Net Developable Area (ha)	Site Status	Assessment Criteria								TOTAL SCORE (/ 30)	Future Development Potential				General Comments
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10	Faygate Business Centre	13.4	5.0	Areas outside built-up area boundary; Strategic Gap	4	4	3	4	3	4	22	Strategic Gap - The Council will seek to prevent development within the strategic gaps in order to prevent actual or perceived coalescence. Outside built-up area - policy requires countryside protection and enhancement. prevent their coalescence.	None obvious.	Short/medium term	B1a, B1b, B1c, B2	Medium size unallocated site adjacent (south) of A264, near Crawley boundary. Existing trade counters, quasi retail and light industrial uses evident. New access from A264 and suitable internal layout, good strategic location. Low level vacancy evident. Scope to intensify uses on vacant plots subject to policy protection of strategic gap / countryside site.		
11	Henfield Business Park	3.3	1.5	Areas outside built-up area boundary	2	3	2	4	3	3	17	Outside built-up area. Policy requires countryside protection and enhancement.	No obvious barriers to delivery of the vacant plots.	Short/medium term	B1b, B1c, B2, B8	Self-contained, non-allocated employment estate south of Henfield. Isolated location but fairly modern facilities with scope to intensify/develop vacant plots to rear of site subject to planning policy compliance.		
12	Novartis	7.5	0.0	Unallocated	3	4	4	4	4	3	22	N/A	None obvious.	Scope for redevelopment for employment and/or alternative uses in the medium term	B1a, B1b, B1c	Medium size unallocated urban site, reduced employment activity on-site by operator (Novartis) who we understand are considering redeveloping site for mix of uses. Average strategic location but good local access to labour and services. Consider suitable for office and/or R&D uses, otherwise prime urban site for alternative uses e.g. residential.		
13	Parsonage Farm	9.3	6.5	Sites for housing development / mixed use (part)	3	3	4	3	3	4	20	Identified for housing / mixed use development. Listed building within site.	None obvious.	Short/medium term	B1a, B1b, B1c, B2, B8	Self-contained site comprising a mix of uses including light industrial and manufacturing within a 1980s/90s business park, plant hire and construction supplies on remainder of the site which is considered lower grade. The existing business park is outside of the housing / mixed-use allocation. Average strategic and local access but no evidence of vacancy. Prospects for intensification of employment use and/or mix of alternative uses, noting predominant residential urban area.		
14	Nightingdale Industrial Estate	4.3	0.0	Employment Area (part); Safeguarded Site (part)	2	1	4	4	3	3	17	Part allocated employment land, part safeguarded for potential railhead aggregate facility in West Sussex Minerals Local Plan	None obvious.	Medium/long term	B1c, B2, B8	Linear site adjacent to railway line within urban area. Poor strategic access and very tight local access, noted difficulty for HGV access. Part allocated employment and part safeguarded for railhead aggregate facility in WSMLP. Evidence of storage and distribution, brewery and light industrial uses with some vacancy in lower quality dated stock.		
15	North Heath Estate	1.9	0.0	Unallocated	3	4	4	3	4	4	22	N/A	None obvious but no undeveloped plots.	Limited scope for redevelopment in the medium term	B1a, B1b, B1c	Self-contained business park within predominately residential area north of town centre. Strategic access via A264 1km+ and good local access and internal layout with ample parking. Range of B class uses including office, light industrial and manufacturing. Generally good quality 70s/80s stock with no vacancy.		
16	Foundary Lane	11.4	2.0	Employment Protection Zone (part); Safeguarded Site (part)	3	3	4	4	4	3	21	Part allocated employment land, part safeguarded for potential railhead aggregate facility in West Sussex Minerals Local Plan	None obvious but no undeveloped plots.	Limited scope for redevelopment in the medium term	B1a, B1c, D2, B8	Established allocated employment area which includes Horsham Trade Park. Mix of uses including offices, light industrial, trade counters and bulky retail (e.g. Topps Tiles). Range of stock, generally average quality served by dedicated access roads and parking with estate spine road. Some vacant office stock. Good local access and average strategic access via B2195. Limited scope to intensify uses.		

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Site Reference	Site Name	Total Area (ha)	Estimated Net Developable Area (ha)	Site Status	Assessment Criteria							TOTAL SCORE (/ 30)	Future Development Potential				General Comments
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16a	Blatchford Road / Redkiln Close	8.0	0.0	Employment Protection Zone	3	3	4	4	4	4	22	Designated Employment Area.	None obvious but no undeveloped plots.	Limited scope for redevelopment in the medium term	B1a, B1c, D2, B8	Similar to Foundary Lane, established allocated employment area but with a focus on smaller units, light industrial and some storage/energy network provider base. Range of stock, generally average quality served by dedicated access roads and parking with estate spine road. Good local access and average strategic access via B2195. Limited vacancy and limited scope to intensify uses.	
17	North Street Corridor	8.1	0.0	Unallocated	2	4	5	4	3	3	21	Number of Listed buildings.	None obvious but no undeveloped plots.	Limited scope for redevelopment in the medium term	B1a, B1b	Office corridor running south from railway station towards primary shopping area. Site comprises County and District offices, RSA office and some large vacant units and some retail/leisure uses. Evidence of vacancy within large office units. Strategic access limited due to urban location and lack of car parking but good access to local labour, services and public transport. Limited options for intensification / redevelopment, especially given lack of commercial interest in existing office stock, some of which is dated. Otherwise, good office location near the centre and railway station.	
18	Bishopbric/Albion Way	6.5	3.0	Sites for housing development / mixed use (part)	2	4	5	3	3	3	20	Identified for housing / mixed use development. Listed buildings within site.	None obvious.	Scope for redevelopment in the medium term.	B1a, B1b	Site split either side of Albion Way. Site comprises mix of retail, office, car sales, leisure and religious uses. Some vacant office/retail units, otherwise considered low intensive employment uses. Western parcel of the site is allocated for housing / mixed-use development. Average strategic access but good local access to nearby town centre.	
19	Horsham Town Centre	18.8	0.0	Town Centre, Primary Shopping Area, Site of Archaeological Importance	2	4	5	3	3	3	20	Primary location for main town centre uses e.g. offices. Large volume of listed buildings.	None obvious but limited undeveloped plots.	Limited scope for redevelopment in the medium term.	B1a	Horsham town centre comprises a mix of retail, employment, leisure and residential uses within a medieval settlement pattern. The existing office accommodation is generally good quality, self contained and often above terraced retail units, but overall largely vacant. Strategic access is average, but benefits from good local access within urban area and busy shopping centre. New development constrained by centre layout, lack of available sites and volume of heritage assets. Site comprises large foodstore and limited larger modern employment stock. Overall, weak employment use centre and limited scope for redevelopment / intensification.	
20	Star Road Industrial Estate	10.3	2.0	Employment Protection Zone	2	3	2	4	4	2	17	Designated employment area.	None obvious for undeveloped plots.	Scope for redevelopment of vacant plot in short to medium term.	B1a, B1b, B1c, B2, B8	An established employment location in a fairly isolated countryside location south of Partridge Green. The existing stock comprises a range of older office/industrial stock and some newer light industrial/manufacturing units. Some evidence of some vacancy and one undeveloped plot. Occupiers generally lower grade. Overall, geographic location of site limits its potential and market attractiveness as limited strategic access to highway network, services and local labour market. Maintain employment use based on market signals until point to which alternative uses could be considered.	
21	Station Approach, Pulborough	1.5	0.0	Employment Protection Zone	3	4	4	4	4	3	22	Designated employment area.	None obvious but limited undeveloped plots.	Limited scope for intensification in short to medium term.	B1b, B1c, B2, B8	An established employment estate adjacent to Pulborough Station. Good strategic and local access via A roads and labour/services nearby. Stock of mixed quality, uses also mixed light industrial, trade (Travis Perkins) and automotive. Some limited vacancy. Limited plots for development but intensification and/or upgrade of older stock option in short to medium term.	
22	Broomers Hill Park	1.4	0.0	Areas outside built-up area boundary	3	3	2	4	4	4	20	Outside built-up area. Policy requires countryside protection and enhancement.	None obvious but no undeveloped plots.	Limited scope for redevelopment in the medium term	B1a, B1b, B1c	Self-contained unallocated employment area, countryside location adjacent to A29. Good strategic access given geographic location, suitable internal road layout with dedicated access and parking. Topography variable and no further plots available for development. Limited evidence of vacancy. Stock overall good quality with evidence of recent investment.	

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23	Brinsbury Centre / Chichester College	59.0	40.0	Areas outside built-up area boundary	3	3	2	4	3	3	18	Outside built-up area. Policy requires countryside protection and enhancement.	None obvious for undeveloped plots.	Scope for redevelopment of vacant plots in short to medium term subject to planning.	B1a, B1b, B1c, B2, B8	A countryside site partly occupied by Chichester College Brinsbury Campus. Remote but well connected via the A29, established educational use with ancillary office and agricultural uses. Existing layout and internal access is good with suitable parking provision. Large tranche of land either side of A29 available for development, but all falls outside built-up area boundary. Limited access to services and local labour market, thus unlikely to support large scale employment uses.	
24	Rudgwick Brickworks	17.0	15.0	Areas outside built-up area boundary	2	2	2	4	3	2	15	Outside built-up area. Policy requires countryside protection and enhancement.	None obvious subject to suitable ground conditions.	Limited scope for redevelopment for alternative employment use in short to medium term.	B1c, B2	A countryside site west of Rudgwick, outside built-up area. Remote with limited strategic connectivity, established employment use on site with ancillary office. Existing layout and internal access is good with suitable parking provision. Large tranche of land to rear suitable for redevelopment subject to ground conditions but commercial interest unknown. Limited access to services and local labour market, thus unlikely to support large scale employment uses.	
25	Windacres Farm	6.6	1.5	Sites for housing development / mixed use	2	2	2	4	4	3	17	Outside built-up area. Policy requires countryside protection and enhancement.	None obvious for undeveloped plots.	Scope for redevelopment of vacant plots in short to medium term.	B1a, B1c, B2	Existing Farm site within Rudgwick village, northwest of Horsham. Established employment use (metalworks) with available plots for intensification. Allocated for housing / mixed use. Remote with limited strategic connectivity, local labour and service access also limited. Unlikely to support large scale employment use but scope for development in short to medium term for smaller units and/or alternative uses to serve local need.	
26	Flint Group / Spring Copse Business Park	19.5	10.0	Areas outside built-up area boundary	3	4	2	4	4	3	20	Outside built-up area. Policy requires countryside protection and enhancement.	None obvious for undeveloped plots.	Scope for redevelopment of vacant plots in short to medium term.	B1a, B1b, B1c, B2, B8	Split site - Spring Copse Business Park self contained light industrial and office units situated adjacent to A29. Good internal layout and parking, limited strategic and local access. Flint Group situated to east adjacent to Slinfold, some dated industrial units, 1990s small scale offices and evidence of modern large high-spec redevelopment for commercial user (AJW Aviation). Large tranche of land suitable for redevelopment but all outside of built-up area.	
27	Mackley Industrial Estate	7.0	0.0	Employment Protection Zone	3	3	2	3	3	3	17	Designated employment area. Ancient Woodland and Area of Nature Conservation immediately adjacent (east)	None obvious but no undeveloped plots.	Limited scope for redevelopment or intensification in medium term.	B1a, B1b, B1c, B2, B8	Self contained allocated employment site within Small Dole village. Mix of uses and range of stock, some older warehouse / light industrial units accompanied by average quality office units. Good internal access, layout and parking. Situated off A2037, thus strategic links to south coast. Limited local labour and service supply. Some evidence of vacant units. Surrounded by countryside, ancient woodland and area of nature conservation. Consider limited prospects for intensification of use in medium term.	
28	Southwater Business Park	4.8	0.5	Unallocated	4	4	3	4	4	4	23	N/A	None obvious.	Some scope for intensification in medium term, one vacant plot.	B1a, B1b, B8	Self contained unallocated employment site within Southwater. Mix of B1a,b and B8 uses with some notable commercial occupiers (IBM, Sony). Stock generally good condition with suitable access and parking provision. Strategic access via A24 (north) nearby and short proximity to local services and labour. No evidence of vacant units. Surrounded by country park (south) and predominately residential area. Consider some prospects for intensification of use in medium term, one small vacant plot.	
29	Oakhurst Business Park	13.0	3.0	Employment Protection Zone	4	4	3	4	4	4	23	Designated employment area.	None obvious for undeveloped plots.	Scope for development of vacant plots in short to medium term.	B1a, B1b, B8	Self contained allocated employment site within Southwater, immediately adjacent to A24. Modern, high spec stock comprising a range of B Class uses, including Volvo. Good internal access, parking provision and turning with direct access to A24. No evidence of vacant units, but further investment in new employment space noted. Prospects for further intensification and development of vacant plots in short to medium term.	
30	Water Lane	7.3	0.0	Employment Protection Zone	2	3	3	3	4	3	18	Designated employment area.	None obvious but no undeveloped plots.	Limited scope for redevelopment or intensification in medium term.	B1a, B1c, B2, B8	Self contained allocated employment site within Storrington. Mixed quality stock and range of B class uses, generally light industrial and ancillary office, some dated. Strategic access limited but better access to local labour and services. No vacant plots and limited vacancy. Limited prospects for further intensification in medium term.	

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					Strategic Access	Local Access	Proximity to Labour and Services	Compatibility of Adjoining Uses	Development & Environmental Constraints	Market Attractiveness	Planning Factors		Barriers to Delivery	Timescale for Delivery	Potential Uses		
31	Wiston Business Park	3.1	0.0	Areas outside built-up area boundary	4	4	2	4	4	4	22	Outside built-up area. Policy requires countryside protection and enhancement.	None obvious but no undeveloped plots.	Limited scope for redevelopment or intensification in medium term.	B1c, B2, B8	Self contained unallocated employment site adjacent to A24 with dedicated access road. Generally good quality warehouse / manufacturing stock, uses include light manufacturing, storage and distribution. Good strategic access but isolated from local labour and service supply. No vacant plots and limited vacancy. Limited prospects for further intensification in medium term.	
32	Chantry Lane	6.9	6.9	Areas outside built-up area boundary	2	3	3	3	3	2	16	Outside built-up area. Policy requires countryside protection and enhancement.	None obvious.	Scope for redevelopment or intensification in medium term.	B1c, B2	Self contained unallocated employment site south of Storrington. Generally poor quality warehouse / manufacturing stock, dated and high vacancy with some vacant plots. Limited strategic access but good access to local village via country road. Scope for redevelopment in medium term, otherwise alternative uses could be considered suitable e.g. housing.	
33	Gertson Business Park	1.8	1.0	Areas outside built-up area boundary. AONB	2	2	2	3	2	2	13	Outside built-up area. Policy requires countryside protection and enhancement. AONB designation.	None obvious.	Scope for intensification in medium term.	B1c, B2	Self contained unallocated employment site south of Storrington within AONB. Generally low quality, dated light industrial / manufacturing stock, some vacancy with some vacant plots. Limited strategic access and average access to local village via country road. Scope for intensification in medium term, otherwise alternative uses could be considered suitable e.g. housing.	
35	Broadlands Business Park / Langhurst House	32.3	10.0	Areas outside built-up area boundary.	2	4	2	3	3	3	17	Outside built-up area. Policy requires countryside protection and enhancement.	None obvious for undeveloped plots.	Scope for intensification in short to medium term.	B1a, B1b, B1c	Business Park comprises fairly modern office accommodation within high quality landscaped estate. Some limited vacancy, otherwise occupied. Additional plots available for development / intensification. Eastern section of site used by Home Office (Scientific Development Branch testing ground). Limited strategic and local access. Outside of built-up area. Scope for intensification in short to medium term.	
36	Warnham & Wealden Brickworks	24.5	10.0	Sites for Employment Use.	2	3	2	4	3	2	16	Allocated for employment use (B2/B8).	None obvious for undeveloped plots.	Scope for intensification in short to medium term.	B1c, B2, B8	Warnham Brickworks remains operational, alongside new waste facility in line with employment allocation policy. Other existing stock vacant, dated a low quality. Available plots for intensification/redevelopment but commercial interest likely to be key given isolated brownfield location. Strategic and local access limited. Scope for intensification in short to medium term.	
37	Washington Quarry	6.9	6.9	Areas outside built-up area boundary. Sites of Archaeological Importance (part).	3	2	2	3	3	2	15	Outside built-up area. Policy requires countryside protection and enhancement.	Sites of Archaeological Importance (part). Ground conditions.	Scope for redevelopment in medium to long term.	B1c, B2, B8	Former quarry, situated off The Hollow, east of Storrington and A24. Unable to access site but assume dated and low quality stock with potential ground conditions to overcome, noted variable topography. Scope for redevelopment in medium to long term subject to policy and archaeological interest. Strategic access good but limited local services/labour.	
38	North Horsham	15.6	15.6	Areas outside built-up area boundary.	4	3	4	3	3	4	21	Outside built-up area. Policy requires countryside protection and enhancement.	None obvious.	Scope for development in medium to long term.	B1a, B1b, B1c, B8	Agricultural land situated northeast of Horsham adjacent to A264. Good strategic access to Horsham and Crawley, although local access may require upgrading, note railway line crosses access to site. Local labour and services nearby, otherwise well located site for new employment use subject to planning policy. Scope for development in medium to long term.	
39	Land at Hop Oast, Southwater	5.6	5.6	Areas outside built-up area boundary; Strategic Gap	4	3	3	4	3	3	20	Strategic Gap - The Council will seek to prevent development within the strategic gaps in order to prevent actual or perceived coalescence. Outside built-up area - policy requires countryside protection and enhancement.		Scope for development in medium term.	B1a, B1b, B1c, B8	Agricultural land situated south of Horsham adjacent to A24. Good strategic access to Horsham and Southwater, although local access may require upgrading. Local labour and services nearby, otherwise well located site for new employment use subject to planning policy. Existing PFS, recycling centre and park & ride situated east of the site. Scope for development in medium term.	
40	Land at Newhouse Farm, North Horsham	9.2	9.2	Areas outside built-up area boundary, AONB.	3	3	3	4	3	3	19	Outside built-up area. Policy requires countryside protection and enhancement. AONB designation.	None obvious.	Scope for development in medium to long term.	B1a, B1b, B1c, B8	Agricultural land situated east of Horsham adjacent to A24. Good strategic access to Horsham and Crawley, although local access may require upgrading. Local labour and services nearby, otherwise well located site for new employment use subject to planning policy and AONB. Existing employment uses adjacent at Newhouse Farm (small relatively modern business park). Scope for development in medium to long term.	
41	Land at Lower Broadbridge Farm, Broadbridge Heath	11.9	11.9	Areas outside built-up area boundary	3	3	3	4	4	3	20	Outside built-up area - policy requires countryside protection and enhancement.	None obvious.	Scope for development in medium to long term.	B1a, B1b, B1c, B2, B8	Agricultural land situated west of Horsham adjacent to A281. Average strategic access to Horsham and surrounding area. No existing local access but local labour and services nearby in Broadbridge Heath and Horsham. Outside of built-up area and geographic location not ideal for connectivity but scope for development in medium to long term.	

Mid Sussex

Site Reference	Site Name	Total Area (ha)	Estimated Net Developable Area (ha)	Site Status	Assessment Criteria								TOTAL SCORE (/ 30)	Future Development Potential				General Comments
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1	Borers Yard	0.9	0.0	Business Development	3	4	3	3	3	3	19	Identified Business Development site within built up area boundary.	None obvious but no undeveloped plots.	No scope for redevelopment in the medium term	B1a, B1b, B1c	Self-contained light industrial business area within Coptthorne settlement area. Constrained by residential uses to west and east, open countryside to north. Average strategic and local access, but dedicated access and parking. Limited scope for expansion / intensification. No evidence of vacancy on site. Current uses include wine merchants, offices and automotive. Note business development allocation has been withdrawn in 2013 District Plan submission.		
2	High Grove, Imberhorne Lane	2.3	1.0	Business Development	2	3	3	4	3	3	18	Identified Business Development site outside built up area boundary, within countryside and Ashdown Forest buffer zone.	No obvious barriers to delivery of the vacant plots.	Part of site available for redevelopment in short to medium term	B1c, B2, B8	Southwest of East Grinstead, occupied by a market garden and County waste facility. Average strategic and local access, dedicated access road with limited parking provision. Variable topography and countryside location. Note 2013 District Plan submission removes business development designation. Scope for intensification of uses on the site in the short to medium term.		
3	Former Sewage Treatment Works, Burgess Hill	12.1	10.0	Business Development	4	3	4	4	3	3	21	Identified Business Development site within built up area boundary. Potential flood risk to west of site; potential contamination.	None obvious.	Redevelopment of majority of site possible in the medium term	B1a, B1b, B1c, B2, B8	Former sewage works north of Burgess Hill within built up boundary. Largely vacant, some gypsy accommodation to north and recycling facility to east served by same access. Dedicated access and good strategic links to north and south coast. Good local access to labour and services, potential flood risk and land contamination issues to overcome. Potential for large scale redevelopment in medium term, employment use and/or alternative uses e.g residential. Note, business development allocation removed in 2013 District Plan submission.		
5 or 21	Land North of Ivy Dene Lane, Ashurstwood	1.1	0.3	Business Development	2	2	2	3	3	2	14	Identified Business Development site outside built up area boundary, within High Weald AONB and Strategic Gap / Ashdown Forest Buffer Zone.	None obvious for vacant plots.	Redevelopment of vacant plots possible in the medium term	B1c, B2	Small self-contained employment area north of Ashurstwood. Poor strategic and local access, single lane county road linkage only. Constrained site, lack of parking and turning space. Dated and low quality stock with mix of uses, comprising automotive, ancillary agricultural. Some scope for development of vacant plot to front and rear, but constrained and likely to serve local catchment only.		
8	Backlands Farm, Hickstead	0.9	0.0	Countryside Area of Development Restraint	4	3	2	3	3	3	18	Countryside site, outside built up area with element of flood risk immediately to north of site.	None obvious but no developable plots available.	No scope for redevelopment in the medium term.	B1c, B2, B8	Self-contained site adjacent to Backlands Farm, Hickstead, west of Burgess Hill. This site is in a very useful strategic location in close proximity to the A23, but is isolated from local labour and services. Site currently in use as plant/vehicle hire and ancillary retail operation. Limited scope for redevelopment in medium term.		
9	Birches Industrial Estate	13.2	1.0	Business Development (part), Built Up Area	4	4	4	4	4	4	24	Business Development area covers west of the site. Ashdown Forest Buffer Zone.	None obvious but limited undeveloped plots.	Limited scope for development or intensification in medium term.	B1a, B1b, B8	Established business park west of East Grinstead, part within business development area, part within built up area. Good strategic links via A22/A264 and near local labour and services. Business development area has been built-out. Some vacant units but mix of stock, some modern with high-tech units within new business development area. 2013 Local Plan submission removes business development area and maintains entire site within built up area.		
10	Bolney Grange Business Park	9.6	2.5	Business Development (part); Countryside Area of Development Restraint (part)	4	4	2	4	3	3	20	Designated Employment Area (part). Countryside Area of Development Restraint (part). Element of flood risk to north of site. Close to newly proposed area of employment land at Cuckfield Lane (2013 Local Plan Policy DP2).	None obvious within business development allocation, remaining land is within Countryside Area of Development Restraint.	Scope for intensification in the medium term.	B1b, B1c, B2, B8	Established business park west of Burgess Hill, part within business development area, part within countryside protection. Good strategic links via A23 but isolated from local labour and services. Situated near newly proposed employment site at Cuckfield Lane. Existing uses comprise mixed manufacturing, light industry and automotive with some vacancy in older stock. Generally large average quality stock, but good strategic employment site with dedicated access, parking and turning space. Scope for intensification within business development area, otherwise new development within surrounding site area subject to planning policy countryside protection.		

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12	Bridge Road Industrial Estate	6.4	0.0	Built Up Area	3	4	5	3	2	4	21	Flood Risk throughout the site.	None obvious but no developable plots available.	Limited scope for development or intensification in medium term.	B1a, B1c, B2	Established employment area within urban area. Current uses comprise light industrial, trade counters, automotive and ancillary office with some evidence of recent investment. Stock generally average conditions with some vacancy. Average strategic access but good local labour and service provision. Limited scope for intensification given physical constraints, surrounding residential units and flood risk.	
13	Burrell Road Industrial Estate	3.4	0.0	Built Up Area	3	4	5	3	3	3	21	N/A	None obvious but no developable plots available.	Limited scope for development or intensification in medium term.	B1a, B1c, B2	Established employment area situated along Burrell Road, within urban area. Current uses comprise offices, light industrial, services, automotive with adjacent foodstore and health facilities. Mixed quality stock, some dated and some vacancy noted. Average strategic access but good local labour and service provision. Limited scope for intensification given physical constraints and surrounding residential units.	
14	Charlwoods Industrial Estate	5.8	0.0	Built Up Area	3	3	4	3	3	3	19	N/A	None obvious but no undeveloped plots.	Limited scope for development or intensification in medium term.	B1a, B1b, B1c, B8	Linear arrangement of large employment units, situated within East Grinstead urban area. Generally 1970s/80s stock, mixed quality, current uses comprise light industry, manufacturing, trade supplies and automotive. Average strategic access but located within urban area, close to labour and services. Some evidence of vacancy. Limited scope for intensification or redevelopment in medium term.	
15	Church Road Walk	8.0	0.0	Town Centre Shopping Boundary, Built Up Area	3	4	5	3	3	3	21	N/A	None obvious but no undeveloped plots.	Limited scope for redevelopment in the medium to long term	B1a, B8	Burgess Hill town centre is the primary retail destination in the south of the District and comprises some small office units above terraced retail units, as well as some individual office buildings. The existing stock is generally low quality with evidence of vacancy. Strategic access is average, but the centre benefits from good local access within a busy urban area and shopping centre. New employment development is constrained by centre layout, lack of available sites and primary retail focus. Overall, weak employment use centre and limited scope for redevelopment / intensification unless comprehensive redevelopment is considered.	
16 (was 17)	Felbridge Centre, East Grinstead	2.0	0.0	Built Up Area	4	3	4	4	4	3	22	N/A	None obvious but limited undeveloped plots.	No scope for redevelopment or intensification in medium to long term.	B1a, B1b, B8	Self-contained extension to the Birches Industrial Estate, shared access via Imberhome Lane. Large warehouse units, good quality stock but some evidence of vacancy. Mix of occupiers, engineering and distribution/storage. Good strategic location and near local labour and services. Limited scope for intensification in the medium term.	
17	Horsted Keynes Industrial Park	3.2	0.5	Specific Policy Area; AONB	1	2	1	3	3	2	12	Policy HK1 - restricts expansion of the site unless local need demonstrated. High Weald AONB	Local need would need to be demonstrated; environmental considerations, countryside location and AONB.	Limited scope for intensification in short to medium term.	B1c, B2	Established, self-contained rural employment site outside Horsted Keynes. Isolated, poor strategic and local links, serves local catchment only. Dated and low quality stock with some vacancy. Existing uses comprise light industry, construction and ancillary agriculture. Limited scope for intensification.	
18 (was 19)	Imberhome Way, East Grinstead	1.9	0.0	Built Up Area	4	2	4	4	4	3	21	N/A	None obvious but limited undeveloped plots.	Some scope for intensification or upgrade of facilities in medium term.	B1a, B1c, B8	Self-contained cluster of employment uses accessed via dedicated spine road. Constrained layout and on-street parking with limited expansion area. Generally lower quality stock, some light manufacturing, offices, distribution and gym uses. Good strategic location but limited scope for redevelopment, otherwise upgrade of facilities possible.	

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19 (was 20)	Independent Business Park, East Grinstead	1.7	0.0	Built Up Area	4	3	4	4	4	3	22	N/A	None obvious but limited undeveloped plots.	Some scope for intensification or upgrade of facilities in medium term.	B1a, B1b, B1c, B8	Self-contained business park adjacent to Birches Industrial Estate, dedicated access via Imberhome Lane. Mix of stock, generally average quality but some dated. Existing uses comprise light industrial, manufacturing and some offices. Limited evidence of vacancy. Good strategic location and near local labour and services. Limited scope for intensification in the medium term but upgrade of facilities possible.	
21	Kings Business Centre, Sawyers Common	0.8	0.3	Countryside Area of Development Restraint	4	3	2	3	3	3	18	Countryside site, outside built up area	None obvious but limited undeveloped plots.	Limited scope for intensification in short to medium term.	B1a, B1b, B1c, B8	Self-contained business park west of Sawyers Common and the A23. Good strategic access but limited local labour and service provision. Existing stock mixed but generally good quality. Current uses comprise light manufacturing, storage and ancillary offices. Limited vacancy. Limited scope for intensification in the short to medium term.	
23	Lindfield Business Park	0.4	0.0	Built Up Area	2	3	3	3	3	3	17	Area of flood risk.	None obvious but noundeveloped plots.	Limited scope for intensification in short to medium term.	B1a, B1c, B8	Small self-contained business park east of Haywards Heath. Limited strategic access but some access to local labour and service provision. Existing stock relatively modern, good quality with suitable internal layout and parking provision. Existing uses comprise quasi retail, light manufacturing, furniture sales, offices and veterinary surgery. Limited vacancy and no vacant plots, therefore limited scope for intensification in the short to medium term.	
25	Perrymount Road, Haywards Heath	12.5	5.0	Built Up Area; Specific Policy Area	3	4	5	4	4	2	22	Specific policy relating to redevelopment of north end of site to provide mixed use scheme comprising new railway station with primarily residential uses and ancillary office, leisure and Class A uses.	None obvious.	Some scope for intensification of employment uses as part of mixed-use station redevelopment in the medium term.	B1a	A large office cluster adjacent to railway station, this site is within the built up area and partly allocated for redevelopment to provide a new station and mixed-use scheme. Existing 4+ storey office buildings, some refurbished and others fairly modern but largely vacant. Surrounded by other main town centre uses and residential units. Limited strategic access but good local access to labour, services and railway links. Some scope to intensify employment use as part of station redevelopment, otherwise high vacancy rate concern as to commercial interest.	
26 (was 28)	Railway Approach, East Grinstead	1.1	0.8	Town Centre Shopping Boundary (part), Built Up Area	3	4	5	4	4	3	23	N/A	None obvious but eastern site is within shopping area and occupied by retail uses.	Comprehensive redevelopment of eastern section of site possible in medium term	B1a, B1c, B8	Linear constrained site on edge of town centre shopping area, adjacent to railway station. Existing use comprise timber yard and mix of terraced retail, office and residential uses. Average strategic access but good local labour and services provision. Comprehensive redevelopment of eastern section of site possible in medium term to facilitate better use of land, e.g mixed use scheme comprising employment, retail, residential uses.	
27 (was 29)	Ricebridge Works, Hickstead	1.9	0.3	Countryside Area of Development Restraint	4	3	2	3	3	3	18	Countryside site, outside built up area with element of flood risk immediately to south of site.	None obvious but limited developable plots available.	Limited scope for redevelopment in the medium term.	B1b, B1c, B2, B8	Self-contained site adjacent to the A23, west of Burgess Hill. Isolated from local labour and services. Site currently in use as a small business estate comprising manufacturing, light industry, storage and ancillary offices. Mixed quality stock, some dated warehouse units but other good quality 1990s units. Some scope for intensification but evidence of some vacancy and limited available plots.	
28	Rowfant Business Centre	15.8	7.5	Countryside Area of Development Restraint; Strategic Gap; Specific Policy Area	2	3	2	3	3	2	15	Countryside site, outside built up area. Replacement employment development acceptable subject to no significant adverse impact on character/amenities and no significant increase in traffic.	None obvious for vacant plots available, subject to environmental / arboricultural justification.	Scope for intensification in the medium term, subject to commercial interest.	B1a, B1b, B1c, B2	Former brickworks site in a rural location, east of Crawley. Self-contained, isolated site currently comprises small business units, light industry with ancillary offices and timber/building merchants. Existing stock dates from late 1980s, generally good quality and benefits from dedicated access, parking etc. Large available plots for expansion, but existing vacancy, topography and lack of strategic access hinders development prospects. Some scope for intensification subject to market interest.	

Site Reference	Site Name	Total Area (ha)	Estimated Net Developable Area (ha)	Site Status	Assessment Criteria							TOTAL SCORE (/ 30)	Future Development Potential				General Comments
					Strategic Access	Local Access	Proximity to Labour and Services	Compatibility of Adjoining Uses	Development & Environmental Constraints	Market Attractiveness	Planning Factors		Barriers to Delivery	Timescale for Delivery	Potential Uses		
29	Sheddington Industrial Estate	3.2	0.0	Built Up Area	4	4	4	4	4	4	24	N/A	None obvious but no vacant plots.	Limited scope for intensification in short to medium term.	B1c, B2, B8	Established, self-contained industrial estate north of Burgess Hill within built up boundary. Largely occupied, average quality stock with evidence of office, light industry, storage and distribution uses. Dedicated access and good strategic links to north and south coast. Good local access to labour and services. Limited potential for intensification in short to medium term given lack of vacant plots, otherwise good employment site.	
30	The Brow	1.6	2.0	Built Up Area	3	3	5	3	4	2	20	N/A	None obvious.	Potential for reoccupation, refurbishment or redevelopment of Sussex House.	B1a	Single large office building on edge of town centre (Sussex House), currently vacant. Surrounding uses comprise residential, health and civic, adjacent to town centre shopping area. Average strategic links but good local access to services and labour. Scope for reoccupation, refurbishment or redevelopment for employment use or alternative uses subject to market demand.	
31	Victoria Business Park West	21.3	3.5	Built Up Area	4	4	4	5	4	5	26	N/A	None obvious but limited vacant plots.	Some scope for intensification of uses in medium term.	B1a, B1b, B1c, B2, B8	Western element of Victoria Business Park comprising a range of large B Class units, some occupied by commercial operators such as Royal Mail, Porsche, Nova Direct, Roche. Good quality stock, some modern, limited vacancy. Evidence of recent investment and some ancillary leisure development (Premier Inn / restaurant). Final developable plots currently under construction. Good strategic location and nearby access to local labour and services. Limited scope for further new development, but continued opportunity for intensification.	
32	Victoria Business Park East	32.8	2.0	Built Up Area	4	4	4	5	4	4	25	N/A	None obvious but limited vacant plots.	Some scope for intensification of uses in medium term.	B1a, B1b, B1c, B2, B8	Eastern element of Victoria Business Park comprising a range of large B Class units and smaller office units, generally lower quality and some dated. Some vacancy noted to south and northwest of site. One developable plot situated to northeast. Good strategic location and nearby access to local labour and services. Some scope for further new development, but continued opportunity for upgrade / refurbishment of stock.	
33 (was 38)	Western Road Industrial Estate, Haywards Heath	0.8	0.1	Built Up Area	3	4	4	2	2	2	17	N/A	None obvious but no vacant plots.	No expansion potential, but comprehensive redevelopment option in medium to long term.	B1a, B1c	constrained employment site within urban area surrounded by residential uses. Existing stock mixed, some dated and others more modern. Currently occupied by trade counter, car garage and church hall. Average strategic access but good local access to labour and services. No scope for expansion given physical constraints, possible scope for comprehensive redevelopment for employment uses, otherwise alternative e.g. residential.	
34 (was 39)	Winterpick Business Park, Sawyers Common	2.5	1.0	Countryside Area of Development Restraint	2	3	2	3	3	2	15	Countryside site, outside built up area.	None obvious for vacant plots, subject to environmental policy protection.	Scope for some intensification of use on vacant plots.	B1c, B2, B8	Rural, isolated site close to District boundary. Existing used comprise light industrial and storage/removals. Mixed quality stock, some dated. Dedicated local access and parking provision but poor strategic location. Some scope to expand employment use on vacant plots subject to market interest.	

Northern West Sussex Economic Growth Assessment : Appendices

Site Reference	Site Name	Total Area (ha)	Estimated Net Developable Area (ha)	Site Status	Assessment Criteria							TOTAL SCORE (/ 30)	Future Development Potential				General Comments
					Strategic Access	Local Access	Proximity to Labour and Services	Compatibility of Adjoining Uses	Development & Environmental Constraints	Market Attractiveness	Planning Factors		Barriers to Delivery	Timescale for Delivery	Potential Uses		
42	Brighton Road, Pease Pottage	5.7	5.7	Specific Policy Area; AONB; Countryside Area of Development Restraint	5	4	3	3	3	3	21	Specific policy - proposals to further extend the use of GW and G Bridges Ltd site as a breakers yard beyond the area of approximately 6.0ha already approved will not be permitted; Countryside site, outside built up area; High Weald AONB.	None Obvious.	Scope for intensification and/or redevelopment in medium term.	B1b, B1c, B2, B8	Situated south of Crawley adjacent to A23/M23, site currently used as a vehicle salvage yard and UK Border Agency pre-departure accommodation. Existing stock is average quality and operated by a sole operator. Good strategic and local connections but somewhat isolated from labour and service provision. Specific policy area restricting further expansion of breakers yard, whilst in an area of countryside protection and AONB. Scope for intensification of use and/or redevelopment in medium term.	
43	East Grinstead Town Centre / Cantelupe Road	13.8	1.0	Primary Shopping Area; Built Up Area	3	3	4	3	3	3	19	Ashdown Forest Buffer Zone	None obvious.	Scope for some intensification of use / upgrade of existing facilities in medium term.	B1a	Main cluster of town centre office buildings situated immediately east of main shopping streets. Smaller first floor offices located above retail units on London Road. Generally good quality stock with some limited vacancy. Average strategic links but good access to local services and labour. Some scope for redevelopment but intensification and/or upgrade of facilities possible in medium term.	
44	London Road Office Corridor / Wood Street, East Grinstead	4.1	0.5	Built Up Area	3	3	4	4	4	3	21	Ashdown Forest Buffer Zone	None obvious.	Scope for some intensification of use / upgrade of existing facilities in medium term.	B1a	Cluster of large, multiple storey office buildings north of the town centre. Generally good quality stock but noted vacancy, especially on London Road. Average strategic links but good access to local services and labour. Limited scope for redevelopment but intensification and/or upgrade of facilities possible in medium term.	
45	Park Road/Maypole Road Office Cluster	1.0	0.0	Built Up Area	3	3	4	4	4	2	20	N/A	None obvious but no vacant plots.	Scope for upgrade of existing facilities or redevelopment in short to medium term.	B1a, B1c	A small cluster of dated, low quality office units to the north of East Grinstead town centre. Average strategic links but good access to local services and labour. Some vacancy noted. Scope for upgrade of facilities in short term, otherwise redevelopment for non-intrusive employment uses given surrounding residential uses, otherwise alternative uses possible.	

Appendix 6 Experian Baseline Forecasts

Crawley

Experian Sector	Workforce Jobs			
	2011	2031	Change 2011-2031	% Change 2011-2031
Agriculture, Forestry & Fishing	40	40	0	0.0
Extraction & Mining	0	0	0	0.0
Food, Drink & Tobacco	110	240	130	118.2
Textiles & Clothing	20	9	-10.7	-53.5
Wood & Paper	10	7	-3.3	-33.0
Printing and Recorded Media	70	50	-20	-28.6
Fuel Refining	0	0	0	0.0
Chemicals	60	40	-20	-33.3
Pharmaceuticals	210	110	-100	-47.6
Non-Metallic Products	170	170	0	0.0
Metal Products	220	150	-70	-31.8
Computer & Electronic Products	2,670	1,860	-810	-30.3
Machinery & Equipment	340	160	-180	-52.9
Transport Equipment	870	980	110	12.6
Other Manufacturing	930	720	-210	-22.6
Utilities	1,380	1,450	70	5.1
Construction of Buildings	770	980	210	27.3
Civil Engineering	310	320	10	3.2
Specialised Construction Activities	1,360	1,480	120	8.8
Wholesale	4,690	5,340	650	13.9
Retail	7,470	7,940	470	6.3
Accommodation & Food Services	5,990	7,080	1,090	18.2
Land Transport, Storage & Post	12,880	16,030	3,150	24.5
Air & Water Transport	9,090	10,400	1,310	14.4
Recreation	1,460	1,130	-330	-22.6
Media Activities	840	970	130	15.5
Telecoms	870	890	20	2.3
Computing & Information Services	1,930	2,300	370	19.2
Finance	3,260	4,050	790	24.2
Insurance & Pensions	540	770	230	42.6
Real Estate	330	640	310	93.9
Professional Services	5,580	8,320	2740	49.1
Administrative & Supportive Services	14,390	19,660	5,270	36.6
Other Private Services	820	880	60	7.3
Public Administration & Defence	2,050	1,570	-480	-23.4
Education	3,730	4,710	980	26.3
Health	2,110	2,320	210	10.0
Residential Care & Social Work	1,920	2,160	240	12.5
Total	89,490	105,926	16,436	18.4

Horsham

Experian Sector	Workforce Jobs			
	2011	2031	Change 2011-2031	% Change 2011-2031
Agriculture, Forestry & Fishing	510	570	60	11.8
Extraction & Mining	50	60	10	20.0
Food, Drink & Tobacco	970	950	-20	-2.1
Textiles & Clothing	110	10	-100	-90.9
Wood & Paper	240	150	-90	-37.5
Printing and Recorded Media	460	390	-70	-15.2
Fuel Refining	1	0	0	-21.1
Chemicals	170	110	-60	-35.3
Pharmaceuticals	320	170	-150	-46.9
Non-Metallic Products	590	530	-60	-10.2
Metal Products	430	300	-130	-30.2
Computer & Electronic Products	1,250	900	-350	-28.0
Machinery & Equipment	270	190	-80	-29.6
Transport Equipment	80	90	10	12.5
Other Manufacturing	720	600	-120	-16.7
Utilities	390	550	160	41.0
Construction of Buildings	1,730	1,940	210	12.1
Civil Engineering	770	840	70	9.1
Specialised Construction Activities	2,350	2,560	210	8.9
Wholesale	4,360	4,770	410	9.4
Retail	5,770	6,050	280	4.9
Accommodation & Food Services	3,340	3,980	640	19.2
Land Transport, Storage & Post	1,200	1,310	110	9.2
Air & Water Transport	20	20	0	0
Recreation	2,350	2,720	370	15.7
Media Activities	370	490	120	32.4
Telecoms	480	500	20	4.2
Computing & Information Services	1,750	2,170	420	24.0
Finance	990	1,030	40	4.0
Insurance & Pensions	860	850	-10	-1.2
Real Estate	1,200	1,670	470	39.2
Professional Services	5,650	8,300	2,650	46.9
Administrative & Supportive Services	4,480	5,670	1,190	26.6
Other Private Services	2,330	3,000	670	28.8
Public Administration & Defence	900	700	-200	-22.2
Education	5,240	6,480	1,240	23.7
Health	1,840	2,140	300	16.3
Residential Care & Social Work	3,260	3,930	670	20.6
Total	57,801	66,690	8,890	15.4

Mid Sussex

Experian Sector	Workforce Jobs			
	2011	2031	Change 2011-2031	% Change 2011-2031
Agriculture, Forestry & Fishing	1,700	1,820	120	7.1
Extraction & Mining	10	10	0	0.0
Food, Drink & Tobacco	300	290	-10	-3.3
Textiles & Clothing	110	2	-108	-98.0
Wood & Paper	160	90	-70	-43.8
Printing and Recorded Media	270	230	-40	-14.8
Fuel Refining	0	0	0	0.0
Chemicals	70	20	-50	-71.4
Pharmaceuticals	6	0	-6	-100.0
Non-Metallic Products	450	390	-60	-13.3
Metal Products	280	170	-110	-39.3
Computer & Electronic Products	630	440	-190	-30.2
Machinery & Equipment	970	600	-370	-38.1
Transport Equipment	10	8	-1	-14.4
Other Manufacturing	310	270	-40	-12.9
Utilities	620	800	180	29.0
Construction of Buildings	1,600	1,880	280	17.5
Civil Engineering	520	540	20	3.8
Specialised Construction Activities	2,280	2,460	180	7.9
Wholesale	4,340	4,890	550	12.7
Retail	5,360	5,940	580	10.8
Accommodation & Food Services	4,260	4,900	640	15.0
Land Transport, Storage & Post	1,320	1,650	330	25.0
Air & Water Transport	130	150	20	15.4
Recreation	2,000	2,340	340	17.0
Media Activities	1,270	1,550	280	22.0
Telecoms	150	220	70	46.7
Computing & Information Services	1,530	1,870	340	22.2
Finance	2,950	3,740	790	26.8
Insurance & Pensions	420	580	160	38.1
Real Estate	960	1,280	320	33.3
Professional Services	4,810	6,680	1,870	38.9
Administrative & Supportive Services	3,090	3,700	610	19.7
Other Private Services	2,450	3,140	690	28.2
Public Administration & Defence	1,470	1,150	-320	-21.8
Education	6,000	7,570	1,570	26.2
Health	6,000	7,110	1,110	18.5
Residential Care & Social Work	3,350	4,100	750	22.4
Total	62,155	72,581	10,425	16.8

Appendix 7 Definition of B Class Sectors

Crawley

The method used for re-categorising the employment forecasts by sector into B-Class uses is summarised below.

Apportionment of B Class Sectors to Land Uses

Experian Sector	Proportion of Jobs by Use Class		
	B1 office	B2 industrial	B8 warehousing
Agriculture, Forestry & Fishing	Non B-Class		
Extraction & Mining	Non B-Class		
Food, Drink & Tobacco	0%	100%	0%
Textiles & Clothing	0%	100%	0%
Wood & Paper	0%	100%	0%
Printing and Recorded Media	0%	100%	0%
Fuel Refining	0%	100%	0%
Chemicals	0%	100%	0%
Pharmaceuticals	0%	100%	0%
Non-Metallic Products	0%	100%	0%
Metal Products	0%	100%	0%
Computer & Electronic Products	0%	100%	0%
Machinery & Equipment	0%	100%	0%
Transport Equipment	0%	100%	0%
Other Manufacturing	0%	100%	0%
Utilities		11%	
Construction of Buildings	Non B-Class		
Civil Engineering	Non B-Class		
Specialised Construction Activities	0%	57%	0%
Wholesale	0%	22%	78%
Retail	Non B-Class		
Accommodation & Food Services	Non B-Class		
Land Transport, Storage & Post	0%	0%	31%
Air & Water Transport	Non B-Class		
Recreation	Non B-Class		
Media Activities	100%	0%	0%
Telecoms	100%	0%	0%
Computing & Information Services	100%	0%	0%
Finance	100%	0%	0%
Insurance & Pensions	100%	0%	0%
Real Estate	100%	0%	0%
Professional Services	100%	0%	0%
Administrative & Supportive Services	16%	0%	0%
Other Private Services	Non B-Class		
Public Administration & Defence	10%	0%	0%
Education	Non B-Class		
Health	Non B-Class		
Residential Care & Social Work	Non B-Class		

Source: Experian / NLP analysis

Horsham

The method used for re-categorising the employment forecasts by sector into B-Class uses is summarised below.

Apportionment of B Class Sectors to Land Uses

Experian Sector	Proportion of Jobs by Use Class		
	B1 office	B2 industrial	B8 warehousing
Agriculture, Forestry & Fishing	Non B-Class		
Extraction & Mining	Non B-Class		
Food, Drink & Tobacco	0%	100%	0%
Textiles & Clothing	0%	100%	0%
Wood & Paper	0%	100%	0%
Printing and Recorded Media	0%	100%	0%
Fuel Refining	0%	100%	0%
Chemicals	0%	100%	0%
Pharmaceuticals	0%	100%	0%
Non-Metallic Products	0%	100%	0%
Metal Products	0%	100%	0%
Computer & Electronic Products	0%	100%	0%
Machinery & Equipment	0%	100%	0%
Transport Equipment	0%	100%	0%
Other Manufacturing	0%	100%	0%
Utilities		60%	
Construction of Buildings	Non B-Class		
Civil Engineering	Non B-Class		
Specialised Construction Activities	0%	41%	0%
Wholesale	0%	19%	81%
Retail	Non B-Class		
Accommodation & Food Services	Non B-Class		
Land Transport, Storage & Post	0%	0%	68%
Air & Water Transport	Non B-Class		
Recreation	Non B-Class		
Media Activities	100%	0%	0%
Telecoms	100%	0%	0%
Computing & Information Services	100%	0%	0%
Finance	100%	0%	0%
Insurance & Pensions	100%	0%	0%
Real Estate	100%	0%	0%
Professional Services	100%	0%	0%
Administrative & Supportive Services	40%	0%	0%
Other Private Services	Non B-Class		
Public Administration & Defence	10%	0%	0%
Education	Non B-Class		
Health	Non B-Class		
Residential Care & Social Work	Non B-Class		

Source: Experian / NLP analysis

Mid Sussex

The method used for re-categorising the employment forecasts by sector into B-Class uses is summarised below.

Apportionment of B Class Sectors to Land Uses

Experian Sector	Proportion of Jobs by Use Class		
	B1 office	B2 industrial	B8 warehousing
Agriculture, Forestry & Fishing	Non B-Class		
Extraction & Mining	Non B-Class		
Food, Drink & Tobacco	0%	100%	0%
Textiles & Clothing	0%	100%	0%
Wood & Paper	0%	100%	0%
Printing and Recorded Media	0%	100%	0%
Fuel Refining	0%	100%	0%
Chemicals	0%	100%	0%
Pharmaceuticals	0%	100%	0%
Non-Metallic Products	0%	100%	0%
Metal Products	0%	100%	0%
Computer & Electronic Products	0%	100%	0%
Machinery & Equipment	0%	100%	0%
Transport Equipment	0%	100%	0%
Other Manufacturing	0%	100%	0%
Utilities		89%	
Construction of Buildings	Non B-Class		
Civil Engineering	Non B-Class		
Specialised Construction Activities	0%	48%	0%
Wholesale	0%	21%	79%
Retail	Non B-Class		
Accommodation & Food Services	Non B-Class		
Land Transport, Storage & Post	0%	0%	67%
Air & Water Transport	Non B-Class		
Recreation	Non B-Class		
Media Activities	100%	0%	0%
Telecoms	100%	0%	0%
Computing & Information Services	100%	0%	0%
Finance	100%	0%	0%
Insurance & Pensions	100%	0%	0%
Real Estate	100%	0%	0%
Professional Services	100%	0%	0%
Administrative & Supportive Services	37%	0%	0%
Other Private Services	Non B-Class		
Public Administration & Defence	10%	0%	0%
Education	Non B-Class		
Health	Non B-Class		
Residential Care & Social Work	Non B-Class		

Source: Experian / NLP analysis

Appendix 8 Employment Space Requirements Methodology

Forecasts of Job Growth

Forecasts of job growth for Crawley, Horsham and Mid Sussex for the period up to 2031 were obtained from Experian, using the May 2013 quarterly release. These job forecasts can then be converted to future employment space requirements assuming typical ratios of jobs to floorspace for the different B uses. To estimate space needs, the following average ratios have been applied:

- offices: 1 job per 10.5 m²
- industry: 1 job per 43 m²
- warehousing: 1 job per 65 m² for general, smaller scale warehousing and 1 job per 74 m² for large scale, lower density units

These assumptions are based on the latest HCA/Offpat guidance on employment densities published in 2010.¹ This guidance takes account of recent trends in terms of the changing use of employment space, the main change being the more efficient utilisation of office space due to increased flexible working and hot desking. This has resulted in a decrease in the amount of floorspace per office worker that is assumed compared to earlier guidance.

An allowance of 10% is added to all floorspace requirements to reflect a normal level of market vacancy in employment space. Where a reduction in jobs is forecast, the associated negative floorspace was halved, to reflect the fact that not all of this employment space is likely to be lost.

Safety Margin

To estimate the overall requirement of employment space that should be planned for in allocating sites, and to give some flexibility of provision, it is normal to add an allowance as a safety margin for factors such as delays in some sites coming forward for development.

In a location like Northern West Sussex with a relatively constrained land supply and significant development pressure from other uses, there is a need to ensure a reasonable but not over-generous additional allowance that provides for some flexibility but avoids over-provision of scarce land. However, it also needs to reflect that there may be potential delays in some of the sub-region's larger development sites coming forward for development.

¹ Based on HCA/Offpat Employment Densities Guide, 2010
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The SEEPB guidance on employment land assessments recommends an allowance that is equivalent to the average time for a site to gain planning permission and be developed, typically about two years. For Crawley, Horsham and Mid Sussex, the margins set out in Table A6.1 were added for B Class use based on two years of average net take-up. This appears an appropriate level relative to the estimated scale of the original requirement.

Table A6.1 Safety Margin Allowances

Use	Safety Margin Added (m ²)		
	Crawley	Horsham	Mid Sussex
Offices (B1a/b)	36,470	6,500	6,670
Industrial (B1c/B2/B8)	14,290	22,440	12,430

Source: NLP analysis

Convert to Gross Floorspace Requirements

To convert the net requirement of employment space into a gross requirement (the amount of employment space or land to be allocated), an allowance is also typically made for some replacement of losses of existing employment space that may be developed for other, non B Class uses.

Judgements were made on the suitability and degree of the allowance for future losses which it would be appropriate to apply here based on analysis of supply-side deliverability factors and current trends in the market. Not all losses need to be replaced as some will reflect restructuring in the local economy as less manufacturing space is needed in future. In the past, loss of employment space in Northern West Sussex has largely been driven by falling demand for industrial (particularly B2) uses, while manufacturing employment is forecast to decline in the sub-region over the next 20 years. Wider land availability constraints provide a continued challenge for the sub-region with regards to loss replacement.

Therefore, it is considered inappropriate for the three authorities to replace all losses of employment space going forward and it has been assumed that 50% of the average annual loss of industrial and office space over the last 11 years (2002-2012) will be replaced each year, equating to the floorspace figures outlined in Table A6.2 below. This assumption is made on the basis that losses of industrial space in the past to an extent reflect the wider restructuring of the economy away from manufacturing to service based activities, while historically loss of office space has largely involved loss of older, redundant office space.

Table A6.2 Safety Margin Allowances

Use	Total Loss Replacement (m ²)		
	Crawley	Horsham	Mid Sussex
Offices (B1a/b)	98,660	14,800	10,660
Industrial (B1c/B2/B8)	92,570	88,120	46,140

Source: NLP analysis

Estimate Land Requirement

The final step, for all scenarios, was to translate floorspace into land requirements for both office and industrial uses. This has been calculated by applying appropriate plot ratio assumptions to the floorspace estimates using the following assumptions and local adjustment factors to reflect the pattern of development in the sub-region:

Industrial: a plot ratio of 0.4 was applied so that a 1 ha site would be needed to accommodate 4,000 m² of employment floorspace.

Offices:

- **Crawley** - it was assumed that 50% of new floorspace would be in lower density developments with a plot ratio of 0.4, with 50% in higher density urban/town centre locations at a plot ratio of 2.0.
- **Horsham** - it was assumed that 40% of new floorspace would be in lower density developments with a plot ratio of 0.4, with 60% in higher density urban/town centre locations at a plot ratio of 2.0.
- **Mid Sussex** - it was assumed that 50% of new floorspace would be in lower density developments with a plot ratio of 0.4, with 50% in higher density urban/town centre locations at a plot ratio of 2.0.

Under the alternative 'potential site capacity' scenario, these plot ratio assumptions have been adjusted to reflect the profile and nature of sites being considered.



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