



Bristol Development Framework

# Employment Land Study

Annexes to Final Report  
February 2009



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## A1 STAGE 3 REVIEW OF PRINCIPAL INDUSTRIAL AND WAREHOUSING AREAS

The following table sets out the results of the Stage 3 survey of the city's 68 Principal Industrial and Warehousing Areas (PIWAs)

PIWA code, name, ward, and size (hectares)	Site survey results	Sustainability assessment results <sup>1</sup>	Conclusion and Recommendation
<p>PIWA0001 Avonmouth Docks Avonmouth 169.86 ha</p>	<p>Central and northern parts of PIWA contain Port of Bristol-related plant and buildings. Not appropriate to provide condition assessment due to specialist use of plant and buildings. Also, access not possible on day of site visit. In BCC ownership.</p> <p>Southern part of PIWA (around Victoria Road) contains medium sized industrial and warehousing buildings mostly in good condition. Includes 26-unit Avonbank Industrial Centre (3 units vacant) and 11-unit Avon Riverside Trading Estate (no vacancies identified on site visit). Excellent adjacent access to A4 Portway and M5/M49.</p> <p>NB on west side of Portview Road - outside the PIWA boundary - a number of industrial and warehousing sites were surveyed, including 13-unit Avon Gorge Industrial Estate (no vacancy) - consider extending PIWA boundary through Site Allocations DPD.</p>	<p>Accessibility Grade<sup>2</sup>: E            IMD10%<sup>3</sup>: No            IMD20%<sup>4</sup>: No            Jobs/Workforce ratio<sup>5</sup>: 3            Neighbourhood Renewal Area<sup>6</sup>: No            South Bristol<sup>7</sup>: No            Flood Zone 3<sup>8</sup>: Yes            Local Plan environmental designations<sup>9</sup>: Yes</p>	<p>Like all Avonmouth PIWAs, it generally performs poorly against sustainability indicators but scores well against market attractiveness indicators (e.g. high occupancy, good physical condition, good access to road network).</p> <p>Continue to safeguard for industrial and warehousing uses. Progress designation through Site Allocations DPD.</p>

<sup>1</sup> Full explanation of the indicators used for the sustainability assessment is provided in Section 5 of the main report.

<sup>2</sup> All employment sites within PIWAs were graded according to how accessible they were by public transport. They were graded between A (most accessible) and E (least accessible). The grading was as follows: 120,000-150,000 economically active people aged 16 to 74 within 30 minutes of each employment site within the PIWA by public transport = Grade A; 90,000-120,000 people = Grade B; 60,000-90,000 people = Grade C; 30,000-60,000 people = Grade D; 0-

<b>PIWA code, name, ward, and size (hectares)</b>	<b>Site survey results</b>	<b>Sustainability assessment results<sup>1</sup></b>	<b>Conclusion and Recommendation</b>
PIWA0002 Avonbridge Trading Estate Avonmouth 11.97 ha	PIWA can be divided into two halves (both in BCC ownership). Western half contains 23 medium sized, good condition industrial and warehousing units with 3 units vacant. Eastern half contains Airbus A380 Wing Design industrial and office premises (good condition although industrial element appears inactive). Excellent access to M5/M49 and A4.	Accessibility Grade: D IMD10%: No IMD20%: No Jobs/Workforce ratio: 3 Neighbourhood Renewal Area: No South Bristol: No Flood Zone 3: Yes Local Plan environmental designations: No	Same conclusion and recommendation as for PIWA0001 above.

30,000 people = Grade E. For most PIWAs it was possible to give a single composite grading. However, due to the large size of a number of PIWAs a single grading was not always possible. For these the range of gradings is provided to illustrate their varying performance against this indicator.

<sup>3</sup> 'Yes' indicates that the PIWA contains a Super Output Area which is in the 10% most socio-economically deprived in England according to the Government's latest Indices of Multiple Deprivation (2004).

<sup>4</sup> 'Yes' indicates that the PIWA contains a Super Output Area which is in the 20% most socio-economically deprived in England according to the Government's latest Indices of Multiple Deprivation (2004).

<sup>5</sup> A figure of 1 indicates that the PIWA is within a Super Output Area where there is a balance of jobs and economically active residents. Due to the large size of a number of PIWAs (i.e. some contain more than one SOA) a single job/workforce ratio figure could not always be given. For these, the range of ratios is provided to illustrate the PIWA's varying performance against this indicator.

<sup>6</sup> 'Yes' indicates that the PIWA is within one of the city's seven Neighbourhood Renewal Areas.

<sup>7</sup> 'Yes' indicates that the PIWA is within south Bristol, one of Bristol City Council's priority areas for regeneration activity.

<sup>8</sup> 'Yes' indicates that the PIWA is within the Environment Agency's Flood Zone 3. The Government's PPS25 'Development and Flood Risk' defines land within Flood Zone 3 as having a 'high' probability of flooding, ignoring the presence of flood defences. It seeks to direct development to areas in Flood Zone 1 (low probability).

<sup>9</sup> 'Yes' indicates that the PIWA contains areas with one or more of the following Local Plan 1997 environmental designations: Site of Special Scientific Interest; Site of Nature Conservation Importance; Local Nature Reserve; Green Belt; Ancient Woodland; Common Land; Scheduled Ancient Monument; Listed Building.

PIWA code, name, ward, and size (hectares)	Site survey results	Sustainability assessment results <sup>1</sup>	Conclusion and Recommendation
PIWA0003 Avonmouth Trading Estate Avonmouth 60.58 ha	<p>Overall, good condition with some new large warehousing development (excellent condition) at eastern end of PIWA and some fair (and one poor) site in north-western part of PIWA, and very low vacancy. BCC owns eastern part of PIWA plus parts of western section. Excellent access to A4 Portway and M5 Junction 18 for M49.</p> <p>PIWA can be divided into two parts:</p> <p>1) east of St Andrew's Road, north of Avonmouth Relief Road and Avonmouth Way. Here predominantly good condition of buildings except in the north-west corner near the junction of Third Way and St Andrew's Road where there are some fair condition auto-repairs and small-medium sized industrial and warehousing units but low vacancy.</p> <p>2) north of Avonmouth Way. Here, good condition of mostly medium and large-sized industrial and warehousing operations with some 'excellent' condition new warehousing development at Fifth Way end of Avonmouth Way. No vacancy identified.</p>	Accessibility Grade: E IMD10%: No IMD20%: No Jobs/Workforce ratio: 7.1 Neighbourhood Renewal Area: No South Bristol: No Flood Zone 3: Yes Local Plan environmental designations: Yes	Same conclusion and recommendation as for PIWA0001 above.
PIWA0004 Goodneston Road/Filwood Road Industrial Area Hillfields	<p>PIWA can be divided in to 3 parts.</p> <p>1) Area to north-west of Goodneston Road contains a large, vacant poor quality industrial premises (Diamonite) with a significant area of open/scrub land adjacent to it; to the north of Diamonite is a large occupied car showroom/auto repairs building in good condition and further to the north is Parnall Road Industrial</p>	Accessibility Grade: B/C IMD10%: No IMD20%: No Jobs/Workforce ratio: 1.3 Neighbourhood Renewal Area: No	Whilst not performing strongly against all market attractiveness or sustainability indicators, continued designation appears to be appropriate due to generally good level of occupancy and condition of buildings.

<b>PIWA code, name, ward, and size (hectares)</b>	<b>Site survey results</b>	<b>Sustainability assessment results<sup>1</sup></b>	<b>Conclusion and Recommendation</b>
15.10 ha	<p>Estate containing a collection of small-medium industrial units (7 units in total with no vacancies).</p> <p>2) Area to south-east of Goodneston Road is occupied by Graphic Packaging in a large, fair condition industrial and warehousing premises part of which is vacant.</p> <p>3) Area to east of Filwood Road contains a large industrial and warehousing premises (includes Verona and Filwood House) with an approx. 10% office element - condition of buildings good with vacancy only identified in part of the office element.</p> <p>The PIWA is adjacent to residential properties to the south, east and west. It is close to the A432 providing reasonable access to the M32 via Muller Road link. No BCC ownership.</p>	South Bristol: No Flood Zone 3: No Local Plan environmental designations: Yes	<p>Also, continued designation appears appropriate given the PIWA is a large, established industrial and warehousing employment location which would be very difficult to replace elsewhere in the city.</p> <p>Continue to safeguard for industrial and warehousing uses. Progress designation through Site Allocations DPD.</p>
PIWA0005 Channons Hill Trading Estate Eastville 2.49 ha	This 1997 Local Plan PIWA is now occupied by retail uses. It was not featured in the 2003 Proposed Alterations to the Local Plan Proposals Maps.	N/A	1997 Local Plan designation no longer relevant. Do not progress through Site Allocations DPD.
PIWA0006 Fishponds Trading Estate Eastville and Hillfields	Overall, large established industrial area with low vacancy and fair/good condition of buildings. No BCC ownership. Some neighbouring residential properties but not tightly constrained by close proximity. PIWA approx. 0.75 miles from M32 Junc 2 and A432.	Accessibility Grade: C/D IMD10%: No IMD20%: No Jobs/Workforce ratio: 1.0-1.4 Neighbourhood Renewal	Strong performance against majority of market attractiveness indicators but more mixed for sustainability considerations.

PIWA code, name, ward, and size (hectares)	Site survey results	Sustainability assessment results <sup>1</sup>	Conclusion and Recommendation
27.33 ha	<p>PIWA can be divided into three areas:</p> <p>1) Area to north of Rose Green and Deep Pit Road contains a mixture of small, medium and large industrial and warehousing buildings, mostly fair condition (but also some borderline good). Some non-Class B uses were identified in northern part of this area (e.g. Rajani Superstore). Vacancy very low in general. A notable large site in this area is the former Strachan and Henshaw works which includes an office tower - the tower appears mostly vacant; the industrial and warehousing buildings appear to be occupied by mainly auto-repairs and vehicle storage operators, physical condition of this site is fair borderline poor.</p> <p>2) Area to the south of Rose Green Road consists of Crofts End Industrial estate (approx 9 small industrial units in good condition with no vacancy) and Dragon Court (20 small industrial units, good borderline excellent condition small business units with 1 vacancy).</p> <p>3) Area to south of Deep Pit Road contains a large industrial/warehousing building (SCA Bristol Industrial Packing Division), good/fair condition with a significant grassed area to its north.</p>	<p>Area: No  South Bristol: No  Flood Zone 3: No  Local Plan environmental designations: Yes</p>	<p>Continue to safeguard for industrial and warehousing uses. Progress designation through Site Allocations DPD.</p>
PIWA0007 Whitehall Trading Estate Easton	2 parts to the PIWA: 1) Elizabeth Shaw Chocolate Factory - fair to poor condition of buildings, factory element vacant; residential properties adjacent to the west and north of site, fewer proximity issues to south and	Accessibility Grade: C IMD10%: No IMD20%: No Jobs/Workforce ratio: 0.57	Performs strongly against sustainability indicators (i.e. Low jobs/workforce ratio in locality, good public transport accessibility, within

<b>PIWA code, name, ward, and size (hectares)</b>	<b>Site survey results</b>	<b>Sustainability assessment results<sup>1</sup></b>	<b>Conclusion and Recommendation</b>
3.50 ha	<p>east as site bounded by allotments and cemetery, respectively.</p> <p>2) Area to south of cycle path consists of East Park Trading Estate (approx 15 small industrial units, good condition, 2 vacant) and a large sized fair condition industrial/warehousing building. Residential proximity issues are reduced as part of the area is quite well screened and buffered by allotments.</p> <p>PIWA is close to A432 (Fishponds Road) providing good, close access (approx 1 mile) to Muller Road link to M32 Junction 2 roundabout.</p>	<p>Neighbourhood Renewal Area: Yes  South Bristol: No  Flood Zone 3: No  Local Plan environmental designations: Yes</p>	<p>Neighbourhood Renewal Area) but less strongly in terms of market attractiveness of the Chocolate Factory part of the PIWA (i.e. significant vacancy, adjacent residential constraints, fair to poor building condition).</p> <p>Continue to safeguard East Park Trading Estate but not Elizabeth Shaw Chocolate Factory part of the PIWA for industrial and warehousing uses. Progress amended designation through Site Allocations DPD.</p>
<p>PIWA0008  Eastgate Centre  Lockleaze  11.08 ha</p>	<p>PIWA split east/west by Glenfrome Road.</p> <p>1) East part occupied by gas holders but also mixture of fair condition medium-sized light industrial premises, one of which is vacant.</p> <p>2) West part of PIWA is mainly occupied by gas holders and associated depot operations. Large distribution premises (no vacancy, good condition) also occupy this area and, adjacent to the elevated M32, a BCC owned site containing a waste transfer operation.</p> <p>PIWA has good access to adjacent M32 Junction 2 with very few constraints from residential proximity (except in north part of the</p>	<p>Accessibility Grade: B/C  IMD10%: No  IMD20%: No  Jobs/Workforce ratio: 2.0  Neighbourhood Renewal Area: No  South Bristol: No  Flood Zone 3: No  Local Plan environmental designations: No</p>	<p>Generally good performance against market attractiveness indicators but less strong sustainability performance.</p> <p>Continue to safeguard for industrial and warehousing uses. Progress designation through Site Allocations DPD.</p>

PIWA code, name, ward, and size (hectares)	Site survey results	Sustainability assessment results <sup>1</sup>	Conclusion and Recommendation
	PIWA at Narrowways Road)		
PIWA0009 Ashley Trading Estate Ashley 3.11 ha	<p>Consists of three Trading Estates situated between Mina Road and Ashley Hill.</p> <p>1) Parkway Trading Estate in north of PIWA - mixture of medium-large industrial/warehouse buildings in fair condition but no vacancy.</p> <p>2) Ashley Hill Trading Estate in west part of PIWA - mixture of medium-large industrial/warehouse buildings in good condition with 1 of the 15 units vacant.</p> <p>3) Minto Road Industrial Centre - mixture of medium-large industrial/warehouse buildings in good condition with 1 of the 8 units vacant (also partly BCC owned).</p> <p>PIWA benefits from being close to M32 Junction 3 and A4320 St Philip's Causeway roundabout albeit through residential area.</p>	Accessibility Grade: C IMD10%: No IMD20%: Yes Jobs/Workforce ratio: 0.4-0.8 Neighbourhood Renewal Area: No South Bristol: No Flood Zone 3: No Local Plan environmental designations: No	<p>Strong performance against both sustainability and market attractiveness indicators.</p> <p>Continue to safeguard for industrial and warehousing uses. Progress designation through Site Allocations DPD.</p>
PIWA0010 Montpelier Trading Estate Ashley 1.13 ha	<p>PIWA consists of the 15-unit Montpelier Central Trading Estate (mixture of small-medium light industrial units, good condition and no vacancy) and Royal Mail sorting office (good condition).</p> <p>Close to A38 Gloucester Road and Cheltenham Road (for access to M32 Junction 3 via Ashley Road). Very close to Montpelier rail station and well-screened and buffered from residential properties to south, east and west.</p>	Accessibility Grade: B IMD10%: No IMD20%: No Jobs/Workforce ratio: 0.6 Neighbourhood Renewal Area: No South Bristol: No Flood Zone 3: No	<p>Strong performance against both sustainability and market attractiveness indicators.</p> <p>Continue to safeguard. Progress designation through Site Allocations DPD.</p>

PIWA code, name, ward, and size (hectares)	Site survey results	Sustainability assessment results <sup>1</sup>	Conclusion and Recommendation
		Local Plan environmental designations: No	
PIWA0011 City Business Park Lawrence Hill 2.78 ha	<p>PIWA consists of 19 small and medium sized industrial and warehousing units, 5 vacant, good condition.</p> <p>Very close to Lawrence Hill roundabout providing good access to St Philip's Causeway (A4320) for M32 and A4. Very few immediate residential proximity constraints as PIWA bounded by Trinity Road/Stapleton Road/Thrissel Street one-way system.</p>	Accessibility Grade: A/B IMD10%: Yes IMD20%: No Jobs/Workforce ratio: 1.8-2.4 Neighbourhood Renewal Area: Yes South Bristol: No Flood Zone 3: No Local Plan environmental designations: Yes	<p>Generally good performance against both sustainability and market attractiveness indicators.</p> <p>Continue to safeguard for industrial and warehousing uses. Progress designation through Site Allocations DPD.</p>
PIWA0012 Kingsland Trading Estate Lawrence Hill 23.15 ha	<p>Overall, large established industrial/warehousing area with very low vacancy, and fair to good condition buildings; adjacent to St Phillip's Causeway for good access to M32 and A4; few residential proximity issues as PIWA bounded by open space, rail lines and elevated St Phillip's Causeway; significant BCC ownership in southern part of PIWA around Day's Road.</p> <p>Two halves to PIWA:            1) Area to north of waste transfer rail line &amp; station/old rail cycle path - contains good and fair condition medium-large sized industrial/warehousing buildings. Only vacancy found on the 9-unit Wadehurst Industrial Park (1 unit vacant).</p>	Accessibility Grade: B-D IMD10%: Yes IMD20%: No Jobs/Workforce ratio: 1.9-2.4 Neighbourhood Renewal Area: Yes South Bristol: No Flood Zone 3: No Local Plan environmental designations: No	<p>Very strong performance against both sustainability and market attractiveness indicators.</p> <p>Continue to safeguard for industrial and warehousing uses. Progress designation through Site Allocations DPD.</p> <p>NB to east of PIWA (around Barrow Street) is a collection of small-medium industrial units – consider for inclusion in preparation of Site Allocations DPD.</p>

PIWA code, name, ward, and size (hectares)	Site survey results	Sustainability assessment results <sup>1</sup>	Conclusion and Recommendation
	2) South of waste transfer rail station - contains medium sized industrial/warehousing buildings in fair and good condition. Variety of uses (e.g. vehicle storage, auto repairs, trade warehouse) - very low vacancy. Also contains BCC household recycling centre and rail transfer station.		
PIWA0013 St Ann's Road Industrial Area Brislington East 8.86 ha	<p>Overall, modern, excellent condition industrial/warehousing premises with very low vacancy; southern part of PIWA BCC owned; very close to both Feeder Road and Whitby Road for good access to A4 and St Philip's Causeway (A4320); few residential proximity constraints due to screening/buffering by trees, high-gradient topography (in south) and river (in north).</p> <p>PIWA can be divided into two halves:</p> <p>1) Area to north of St Anne's Road contains Riverside Business Park (12 small-medium industrial/warehousing units, excellent condition, 1 vacancy). This area also contains other medium sized warehousing operations (including Palmer and Harvey) - no vacancies and excellent condition of buildings.</p> <p>2) Area to south of St Anne's Road contains Avon Valley Business Park (20 small-medium sized industrial/warehousing units, 2 units vacant, excellent condition). Also contains BCC St Anne's House office building (good external condition, no vacancy).</p>	<p>Accessibility Grade: D  IMD10%: No  IMD20%: No  Jobs/Workforce ratio: 1.6  Neighbourhood Renewal Area: No  South Bristol: No  Flood Zone 3: Yes  Local Plan environmental designations: Yes</p>	<p>Very strong performance against market attractiveness indicators but poor performance against sustainability indicators.</p> <p>Continue to safeguard for industrial and warehousing uses. Progress designation through Site Allocations DPD.</p>
PIWA0014 Netham	Overall, large established industrial/warehousing area; good to fair condition of buildings; no vacancies; few existing residential	Accessibility Grade: C/D IMD10%: No	Very strong performance against market attractiveness indicators but

<b>PIWA code, name, ward, and size (hectares)</b>	<b>Site survey results</b>	<b>Sustainability assessment results<sup>1</sup></b>	<b>Conclusion and Recommendation</b>
<p>Industrial Estate St George West and St George East 10.15 ha</p>	<p>proximity constraints; close to Feeder Road and Whitby Road for good access to St Philip's Causeway (A4320) and A4, although access constraints exist for businesses along narrow Crews Hole Road; no BCC ownership.</p> <p>PIWA can be divided into two areas: 1) North of River Avon between Netham Road in the west and the start of Crew's Hole Road in the east. This area contains 3 medium sized industrial estates: a) Netham Park Industrial Estate (12 units, no vacancies, good condition) b) Satellite Business Park (approx 14 units, no vacancies, good condition) c) Netham View Industrial Park, north of Fireclay Road allotments (approx 8 small units, no vacancies, fair borderline good condition). This area also contains a variety of other uses e.g. Bristol Trade Centre (car showroom and auto repairs), stonemasonry works, concrete plant and a 4-storey office building (Satellite House, fair condition, no vacancy). North of Blackswarth Road is a large carpet factory (fair condition) with only the showroom element apparently still in active use.</p> <p>2) Second area of PIWA is along Crew's Hole Road. It contains 2 industrial estates: a) Springwater Park (11 small units, good condition, no vacancy) b) Beehive Trading Estate (approx. 12 small units, fair condition, 1 vacancy, mixture of uses with significant auto-repair element). This area also contains a handful of individual small-medium sized industrial/warehousing operations in good borderline fair condition</p>	<p>IMD20%: No Jobs/Workforce ratio: 0.3-1.2 Neighbourhood Renewal Area: No South Bristol: No Flood Zone 3: Yes Local Plan environmental designations: Yes</p>	<p>mixed results in relation to the PIWA's sustainability.</p> <p>Continue to safeguard for industrial and warehousing uses. Progress designation through Site Allocations DPD.</p> <p>NB Parts of this PIWA were only designated in the 2003 Proposed Alterations Map – consider formal designation through the Site Allocation DPD.</p>

PIWA code, name, ward, and size (hectares)	Site survey results	Sustainability assessment results <sup>1</sup>	Conclusion and Recommendation
	and no vacancy.		
PIWA0015 Barton Hill Trading Estate Lawrence Hill 4.06 ha	<p>PIWA contains approx. 28 units ranging in size from 3 Nissen Huts to medium-large sized industrial/warehousing buildings - generally fair borderline good condition with only 3 units vacant. BCC ownership only at very north of PIWA in building opposite from The Lord Nelson PH.</p> <p>Some residential proximity issues with houses adjacent to parts of west and north of PIWA. Access not ideal given surrounding residential streets although relatively close to Netham Road and Church Road for good access to St Phillip's Causeway (A4320) and its connections to M32/A4.</p>	<p>Accessibility Grade: C  IMD10%: Yes  IMD20%: No  Jobs/Workforce ratio: 7.4  Neighbourhood Renewal Area: No  South Bristol: No  Flood Zone 3: Yes  Local Plan environmental designations: Yes</p>	<p>Generally good performance against market attractiveness factors but mixed sustainability performance.</p> <p>Continue to safeguard for industrial and warehousing uses. Progress designation through Site Allocations DPD.</p>
PIWA0016 Jarvis Street Lawrence Hill 0.44 ha	<p>Terrace of five medium sized industrial/warehousing units - good condition, no vacancy; no BCC ownership. Few residential proximity issues as PIWA bounded by open space, rail line and an infants school. Access not ideal given nearby residential streets but also relatively close to Netham Road and Church Road for good access to St Phillip's Causeway (A4320) and its connections to M32/A4.</p>	<p>Accessibility Grade: C  IMD10%: Yes  IMD20%: No  Jobs/Workforce ratio: 1.9  Neighbourhood Renewal Area: No  South Bristol: No  Flood Zone 3: No  Local Plan environmental designations: Yes</p>	<p>Generally good performance against both sustainability and market attractiveness indicators.</p> <p>Continue to safeguard for industrial and warehousing uses. Progress designation through Site Allocations DPD.</p>
PIWA00017	Long, narrow PIWA bounded by River Frome to the west and	Accessibility Grade: B	Good performance against the

<b>PIWA code, name, ward, and size (hectares)</b>	<b>Site survey results</b>	<b>Sustainability assessment results<sup>1</sup></b>	<b>Conclusion and Recommendation</b>
Penny Well Road Lawrence Hill 10.12 ha	Pennywell Road to east. Range of small, medium and large industrial/warehousing buildings in good to fair condition (one site in poor condition) in various uses (e.g. trade counter, studios, auto-repairs, timber merchants, metal fabrication); very low vacancy. Small element (at extreme north and south of PIWA) in BCC ownership; very close to M32 Junction 3 and close to A4320 St Philip's Causeway link to A4.	IMD10%: Yes IMD20%: No Jobs/Workforce ratio: 1.8-24.1 Neighbourhood Renewal Area: Yes South Bristol: No Flood Zone 3: Yes Local Plan environmental designations: Yes	majority of market attractiveness and sustainability indicators.  Continue to safeguard for industrial and warehousing uses. Progress designation through Site Allocations DPD.
PIWA0018 Avon Street Industrial Area Lawrence Hill 14.27 ha	Overall, good borderline fair condition of buildings with very low vacancy; no residential proximity issues as PIWA bounded by River Avon and Floating Harbour; adjacent to Feeder Road and Avon Street for good access to A4 and Temple Gate/Temple Way for M32.  PIWA can be divided into three parts: 1) Area to south of Silverthorne Lane contains a mixture of medium-large sized industrial/warehousing buildings (good borderline fair condition and no vacancy) containing a variety of uses (e.g. Timber Merchants, Trade Counters, Printers, Storage).  2) Area to north of Silverthorne Lane around Gas Lane contains smaller and medium sized industrial/warehousing buildings (good borderline fair condition, no vacancies) - range of uses include auto repairs, vehicle storage, auto sales, gas storage plant, car pound.	Accessibility Grade: B/C IMD10%: Yes IMD20%: No Jobs/Workforce ratio: 7.4-24.1 Neighbourhood Renewal Area: No South Bristol: No Flood Zone 3: Yes Local Plan environmental designations: Yes	Generally good performance against market attractiveness factors but more mixed sustainability results.  Continue to safeguard for industrial and warehousing uses. Progress designation through Site Allocations DPD.

PIWA code, name, ward, and size (hectares)	Site survey results	Sustainability assessment results <sup>1</sup>	Conclusion and Recommendation
	<p>3) Area to west of Avon Street contains fair borderline good condition medium sized industrial/warehousing buildings containing a variety of uses including some non-Class B Uses (e.g. BMX bike circuit) NB this part of the PIWA was removed from designation for the 2003 Proposed Alterations</p>		
<p>PIWA0019 St Phillips Marsh Lawrence Hill 65.86 ha</p>	<p>Overall, very large, well-established industrial/warehousing area with very low vacancy, good to fair condition of buildings and signs of recent investment in parts; only significant BCC ownership in south-west quarter in the Albert Road area; no residential proximity issues; good access via adjacent Feeder Road to Temple Gate/Temple Way for M32 and via Totterdown Bridge to St Phillip's Causeway and A4.</p> <p>PIWA can be split into 4 quarters.</p> <p>1) South west quarter - i.e. area south of rail line (which runs horizontally through the centre of the PIWA) and west of Albert Crescent.</p> <p>This quarter includes a variety of buildings and uses: e.g. waste handling/ recycling/transfer operations clustered at the west end of Albert Road (fair condition of buildings reflecting waste operations); two small-unit industrial estates either side of Totterdown Bridge (Ferry Steps Industrial Estate - 9 units, 1 vacant, good condition and Totterdown Bridge Industrial Estate - 6 units, no vacancy, good condition); Wholesale Fruit Centre (108 small warehouse units, no vacancies, good condition); medium-large industrial/warehousing units along Albert Road in good</p>	<p>Accessibility Grade: B-D IMD10%: Yes IMD20%: No Jobs/Workforce ratio: 7.4-24.1 Neighbourhood Renewal Area: No South Bristol: No Flood Zone 3: Yes Local Plan environmental designations: Yes</p>	<p>Very good performance against market attractiveness indicators but more mixed sustainability results.</p> <p>Continue to safeguard for industrial and warehousing uses. Progress designation through Site Allocations DPD.</p>

PIWA code, name, ward, and size (hectares)	Site survey results	Sustainability assessment results <sup>1</sup>	Conclusion and Recommendation
	<p>condition</p> <p>2) North-west quarter of PIWA i.e. area north of rail line and east of Albert Crescent/Short Street. This quarter also contains a range of buildings and uses: e.g. west of Albert Road next to the Avon is a collection of medium-sized fair to good condition buildings containing trade warehouse, auto repairs and other industrial uses with no vacancies; north of the rail depot lines is St Phillip's Central Trading Estate (7 medium-large industrial/warehousing units, excellent condition, 1 unit vacant); the rest of this quarter contains a mixture of uses in small to medium-sized fair to good condition industrial/warehouse buildings with no vacancy identified (e.g. vehicle hire/storage, auto repairs, scrap yard) but also contains two small industrial estates: Chandos Trading Estate (5 medium-sized units, fair condition, 1 unit vacant) and Chapel Court Trading Estate (5 small units, good condition, 2 units vacant).</p> <p>3) North-east quarter of PIWA i.e. area to north of rail line and east of Albert Crescent/Short Street. This quarter is dominated by large Western Power Distribution site (good condition office and industrial/warehouse buildings but also includes substantial plant and storage land). Remainder of quarter contains a mixture of good-fair condition small-medium sized industrial buildings with no vacancy identified and a range of industrial/warehousing operations including auto repairs and trade warehouse uses.</p> <p>4) South east quarter of PIWA i.e. area south of rail line to east of Albert Crescent. This quarter is dominated by the rail depot /goods</p>		

PIWA code, name, ward, and size (hectares)	Site survey results	Sustainability assessment results <sup>1</sup>	Conclusion and Recommendation
	yard. But there are also good condition industrial buildings either side of Albert Road with the only vacancy found in two units of a four unit medium sized terrace adjacent to the rail depot. It also includes the excellent condition fully occupied St Phillips Trade Park (3 medium-large warehouse units).		
<p>PIWA0020 Whitby Road Industrial Area Brislington West and Brislington East 21.02 ha</p>	<p>Overall, high occupancy and relatively good condition of buildings with evidence of recent investment. PIWA is adjacent to Whitby Road providing very good access to St Phillips Causeway (A4320) for M32 and Feeder Road for A4 Portway. Only BCC ownership is Weir House (3 storey office block). There are some residential proximity issues along most of the eastern side of the PIWA as it backs on to residential back gardens. No BCC ownership.</p> <p>PIWA can be split into 2 parts:</p> <p>1) Area to south of rail line and depot (bounded by River Avon to the west and residential properties to the east.) East of Whitby Road includes: at the southern end, a terrace of 5 medium sized good condition industrial/warehousing units (no vacancies) which includes Bristol Blue Glass; in the central part, a concentration of 5 medium sized auto sales and repair premises (excellent condition, no vacancy); in the north eastern part, medium sized terrace of industrial/warehouse buildings (excellent condition, no vacancy); in the north western part, Eldonwall Trading Estate, consisting of 17 small-medium industrial/warehousing units (good condition, 4 units vacant) To the west of Whitby Road includes: non Class B-use restaurant</p>	<p>Accessibility Grade: D IMD10%: No IMD20%: No Jobs/Workforce ratio: 0.8-1.5 Neighbourhood Renewal Area: No South Bristol: Yes Flood Zone 3: Yes Local Plan environmental designations: Yes</p>	<p>Good performance against market attractiveness indicators but less strong sustainability performance.</p> <p>Continue to safeguard for industrial and warehousing uses. Progress designation through Site Allocations DPD.</p>

PIWA code, name, ward, and size (hectares)	Site survey results	Sustainability assessment results <sup>1</sup>	Conclusion and Recommendation
	<p>and tool hire at southern end. The rest of this part of the PIWA is occupied by the BOC Gas storage and tank filling operations (good condition of buildings).</p> <p>2) Area to north of rail line and depot (bounded by River Avon to the west and residential and allotments to the east). Area includes: the Unicorn Business Park of 14 medium sized industrial/warehouse buildings (good borderline excellent condition, 2 units vacant); Newbridge Trading Estate - approx 12 medium industrial/warehousing units, good condition, 2 vacant); Weir House – a 3-storey 1970s office block (good borderline fair external condition, part of second floor vacant); in north-western part of this area there are also a small number of individual small-medium sized industrial buildings in good to fair condition and no vacancy.</p>		
<p>PIWA0021 Wilson Street Ashley 2.12 ha</p>	<p>Overall, fair (at best) condition of buildings but fully occupied; residential proximity issues at western end of the site; M32 adjacent to site; no BCC ownership.</p> <p>PIWA can be split into two halves: 1) Western half of PIWA contains English Corrugated Paper industrial works (operating since 1908) in fair borderline poor condition premises. Also, this part of the PIWA contains a derelict residential terrace of 8 properties, a Muslim school and an occupied apartment building. Significant difficulties in internal circulation and servicing by Heavy Goods Vehicles were identified due to narrow road layout and high level of building coverage on</p>	<p>Accessibility Grade: B/C IMD10%: Yes IMD20%: No Jobs/Workforce ratio: 0.6-10.2 Neighbourhood Renewal Area: Yes South Bristol: No Flood Zone 3: No Local Plan environmental designations: Yes</p>	<p>Very strong performance against sustainability indicators (high public transport accessibility, within a Neighbourhood Renewal Area and a SOA which is one of the most 10% deprived in England) but less strongly against the market attractiveness indicators (HGV access and internal servicing difficulties, fair/poor quality buildings).</p> <p>On balance, it is considered that the</p>

PIWA code, name, ward, and size (hectares)	Site survey results	Sustainability assessment results <sup>1</sup>	Conclusion and Recommendation
	<p>site.</p> <p>2) Eastern half contains a mixture of good to fair condition medium sized industrial buildings with no vacancy and a range of uses (e.g. sheet metal manufacture, battery distributor/trade warehouse).</p>		<p>physical constraints mean that it would not be appropriate for this area to be designated as 'strategically important' industrial and warehousing land.</p> <p>Do not progress designation through Site Allocations DPD.</p>
<p>PIWA0022 Avon Side Lawrence Hill 8.62 ha</p>	<p>Overall, good or excellent condition industrial/warehousing buildings with low vacancy; adjacent to Feeder Road providing good access to A4 and Temple Gate/Temple Way for M32; no residential proximity issues as PIWA bounded by Feeder Road, River Avon and rail line.</p> <p>PIWA consists of four trading/industrial estates:</p> <p>1) Merchants Trade Park (7 medium sized units, excellent condition, 1 vacancy, no BCC ownership).</p> <p>2) Kings Business Park (7 medium sized units, excellent condition, 3 units vacant, no BCC ownership).</p> <p>3) Avonside Industrial Estate (approx 14 medium-large sized units, good condition, no vacancy, BCC owned).</p> <p>4) St Vincent's Trading Estate (8 medium-large sized units, good condition, 1 vacant unit, BCC owned). Western extreme of PIWA is occupied by a vacant former Rover car showroom.</p>	<p>Accessibility Grade: D IMD10%: Yes IMD20%: No Jobs/Workforce ratio: 7.4 Neighbourhood Renewal Area: No South Bristol: No Flood Zone 3: Yes Local Plan environmental designations: Yes</p>	<p>Very strong performance against market attractiveness indicators but more mixed against sustainability indicators.</p> <p>Continue to safeguard for industrial and warehousing uses. Progress designation through Site Allocations DPD.</p>
<p>PIWA00023</p>	<p>Overall, large central industrial/warehousing area with buildings in</p>	<p>Accessibility Grade: B/C</p>	<p>Strong performance against market</p>

PIWA code, name, ward, and size (hectares)	Site survey results	Sustainability assessment results <sup>1</sup>	Conclusion and Recommendation
<p>Bedminster Trading Estate Southville 24.59 ha</p>	<p>good to fair condition; very low vacancy (only vacancy identified on Temple Gate Distribution Centre); significant BCC land ownership spread across the PIWA. There are pockets of long-standing residential properties within the PIWA as well as recent residential development (e.g. Squire Court at Bedminster Bridge) at boundary edge, plus retail uses along Bedminster Parade. Beyond this there are relatively few access/residential proximity issues as PIWA is also bounded by rail line. PIWA is adjacent to York Road providing very good access to A4 and Temple Gate (for M32).</p> <p>PIWA can be divided into two parts:</p> <p>1) Area to east of St Lukes Road: includes Temple Gate Distribution Centre (10 medium sized industrial/warehouse units, good condition, 2 units vacant). NB Goods yard next to Temple Gate distribution centre has been identified by Alder King as potential site for industrial/warehouse development. Rest of area consists of a mixture of individual industrial/warehouse buildings and uses - e.g. Royal Mail sorting office, Bart Spices, Fowlers Motor Cycles (retail and auto repairs) – generally all in good condition and no vacancy.</p> <p>2) Area to west of St Lukes Road: contains a range of small to medium sized individual industrial/warehouse buildings in fair or good condition with a wide mixture of uses (e.g. concentration of small auto repair operations along Stillhouse Lane, industrial laundry, metal bashing, auto repairs, domestic furniture distribution). The area also includes RNIB offices (excellent condition) and the Windmill Farm Business Centre (21 small industrial/warehouse units, good condition, no vacancy).</p>	<p>IMD10%: Yes  IMD20%: No  Jobs/Workforce ratio: 7.6  Neighbourhood Renewal Area: No  South Bristol: Yes  Flood Zone 3: Yes  Local Plan environmental designations: Yes</p>	<p>attractiveness indicators but more mixed sustainability performance.</p> <p>Continue to safeguard for industrial and warehousing uses. Progress designation through Site Allocations DPD.</p>

PIWA code, name, ward, and size (hectares)	Site survey results	Sustainability assessment results <sup>1</sup>	Conclusion and Recommendation
PIWA0024 Sandy Park Road Brislington West 1.99 ha	PIWA consists of BCC Contract Services depot. In BCC ownership. Depot buildings in fair condition, no vacancy. Very good access to adjacent A4 and close to St Phillips Causeway (A4320). The site does have residential properties adjacent to it although there is buffering by roads and PIWA car parking areas.	Accessibility Grade: C IMD10%: No IMD20%: No Jobs/Workforce ratio: 1 Neighbourhood Renewal Area: No South Bristol: Yes Flood Zone 3: No Local Plan environmental designations: Yes	Generally good performance against the majority of market attractiveness and sustainability indicators.  Continue to safeguard for industrial and warehousing uses. Progress designation through Site Allocations DPD.
PIWA0025 Malago Vale Estate Windmill Hill 1.16 ha	PIWA consists of 7 medium sized industrial/warehousing units. Condition good across site. One unit vacant. There are residential properties to the east but with good buffering from mature trees. Adjacent to St Johns Lane for good access to A4/A37 and A38/A370 for A4 Portwall. No BCC ownership.	Accessibility Grade: C IMD10%: No IMD20%: No Jobs/Workforce ratio: 0.3 Neighbourhood Renewal Area: No South Bristol: Yes Flood Zone 3: Yes Local Plan environmental designations: No	Generally good performance against both market attractiveness and sustainability indicators.  Continue to safeguard for industrial and warehousing uses. Progress designation through Site Allocations DPD.
PIWA0026 Malago Road/Sheene	Effectively 3 parts to the PIWA. 1) area to west of Sheene Lane: the western and central part of this PIWA is now being converted into residential apartments	Accessibility Grade: B/C IMD10%: Yes IMD20%: No	Strong performance against sustainability indicators (e.g. high public transport accessibility, within a

PIWA code, name, ward, and size (hectares)	Site survey results	Sustainability assessment results <sup>1</sup>	Conclusion and Recommendation
Road Industrial Area Bedminster and Southville 7.52 ha	<p>(Airpoint). The southern part also now contains a supermarket. The Class B-uses that remain in operation within the 1997 Local Plan PIWA boundary are: Sheene Road Trading Estate (5 small industrial/warehousing units, good condition, 1 unit vacant); also, surrounding the supermarket are approx 8 individual medium-sized industrial/warehousing buildings in a variety of uses (good to fair condition, no vacancy)</p> <p>2) area to east of Sheene Lane: comprises the Malago Road Industrial Estate (a terrace of six medium sized units, mainly in trade warehouse use, good condition, one unit vacant)</p> <p>3) area to east of Malago Road: vacant and fair borderline poor condition industrial buildings with small office element. Narrow and isolated site adjacent to rail line.</p> <p>Adjacent to Malago Road/St Johns Lane for good access to A4/A37 and A38/A370 for A4 Portway. No BCC ownership.</p>	<p>Jobs/Workforce ratio: 1.9-7.6  Neighbourhood Renewal Area: No  South Bristol: Yes  Flood Zone 3: No  Local Plan environmental designations: No</p>	<p>SOA which is one of the most 10% deprived in England, few environmental constraints) but less strongly against the market attractiveness indicators, particularly in the area to the east of Sheene Lane (poor condition, access problems).</p> <p>On balance, continued designation appears appropriate, especially given the strategic context of the extreme difficulty in Bristol of replacing lost industrial and warehousing land.</p> <p>Continue to safeguard for industrial and warehousing uses but a revised boundary designation should be taken through the Site Allocations DPD to reflect recent non-Class B-use employment development and planning permissions.</p>
PIWA0027 Bristol Phoenix Bedminster 8.32 ha	<p>PIWA can be split into two halves:</p> <p>1) Eastern half dominated by the Bailey Caravan Factory (excellent condition) and two new large warehouse buildings (Patersons and Big Yellow Storage – both excellent condition).</p> <p>2) Western half contains a mixture of individual</p>	<p>Accessibility Grade: D  IMD10%: No  IMD20%: No  Jobs/Workforce ratio: 0.7-2.3  Neighbourhood Renewal Area: No</p>	<p>Strong performance against market attractiveness indicators but more mixed sustainability performance.</p> <p>Continue to safeguard for industrial and warehousing uses. Progress</p>

PIWA code, name, ward, and size (hectares)	Site survey results	Sustainability assessment results <sup>1</sup>	Conclusion and Recommendation
	<p>industrial/warehouse (inc Trade Warehouse) buildings, mostly in good to fair condition but with two identified as poor (these two were the only sites in the PIWA identified as vacant)</p> <p>PIWA is adjacent to Winterstoke Road with close proximity to major routes inc. A370 &amp; A38. No BCC ownership. Few residential proximity issues as PIWA bounded by major roads and rail line.</p>	<p>South Bristol: Yes Flood Zone 3: No Local Plan environmental designations: No</p>	<p>designation through Site Allocations DPD.</p>
<p>PIWA0028 Ashton Gate Trading Estate Bedminster 17.90 ha</p>	<p>PIWA can be divided into two parts:</p> <p>1) Area to south of Longmoor Brook: dominated by large Mannheim car auction operations (excellent condition). Area also includes Cala Industrial Estate (10 small units, good condition, no vacancy) and land used for storage of containers and DVLA testing centre.</p> <p>2) Area to north of Longmoor Brook: significant coverage by Weir Strachan Henshaw industrial and office buildings (good condition); rest of area includes a range of small to medium sized industrial/warehousing buildings (good condition, no vacancy) in a range of operations (e.g. bakery, auto repairs, telecoms storage). Also of note is 4-floor County Gates office building with one floor vacant.</p> <p>PIWA has good access to Brunel Way (for A370 and A4 Portway). No residential proximity constraints as PIWA is bounded by open space and the A370. No BCC ownership.</p>	<p>Accessibility Grade: C/D IMD10%: No IMD20%: No Jobs/Workforce ratio: 2.3-2.8 Neighbourhood Renewal Area: No South Bristol: Yes Flood Zone 3: Yes Local Plan environmental designations: Yes</p>	<p>Strong performance against market attractiveness indicators but fair to poor sustainability performance.</p> <p>Continue to safeguard for industrial and warehousing uses. Progress designation through Site Allocations DPD.</p>

PIWA code, name, ward, and size (hectares)	Site survey results	Sustainability assessment results <sup>1</sup>	Conclusion and Recommendation
PIWA0029 Ashton Vale Trading Estate Bedminster 12.56 ha	<p>PIWA consists of a range of small-medium sized industrial and warehousing units with a mixture of uses (meat distribution, packaging but also trade warehouse and auto repair uses).</p> <p>Physical condition was identified as mostly good but with a significant number (approx. fifth of properties) noted as fair and one site at western end of PIWA classified as poor. Signs of new investment in PIWA as a larger central site has been cleared and planning permission granted for a regional-sized Group 4 Security processing facility. The majority of buildings were occupied but intermittent vacancies and part vacancies were also spread across the PIWA site. No BCC ownership. Eastern half of PIWA is opposite residential properties. Access is not ideal as PIWA is in an isolated position at far end of South Liberty Lane which also has a width restriction at a rail bridge.</p>	Accessibility Grade: D/E IMD10%: No IMD20%: No Jobs/Workforce ratio: 2.8 Neighbourhood Renewal Area: No South Bristol: Yes Flood Zone 3: No Local Plan environmental designations: No	<p>Mixed performance against both market attractiveness and sustainability indicators. Continued designation appears to be appropriate, especially given the strategic context of the extreme difficulty in Bristol of replacing lost industrial and warehousing land.</p> <p>Continue to safeguard for industrial and warehousing uses. Progress designation through Site Allocations DPD.</p>
PIWA0030 Vale Lane Industrial Area Bishopsworth 8.51 ha	<p>PIWA contains:</p> <p>1) a mixture of approx 20 medium sized industrial/warehousing buildings in a variety of uses (e.g. distribution, auto repair, trade warehouses). Condition is mostly fair with some good. Vacancy reported in 2 buildings.</p> <p>2) Bristol Vale Centre for Industry – approx. 22 small industrial/warehouse units in fair condition and no vacancy identified.</p> <p>PIWA abuts A4174 Hartcliffe Way providing good access to A38 and A3029 (for Brunel Way and A4 Portway). Southern half in</p>	Accessibility Grade: D IMD10%: No IMD20%: No Jobs/Workforce ratio: 1.4 Neighbourhood Renewal Area: No South Bristol: Yes Flood Zone 3: Yes Local Plan environmental designations: Yes	<p>Strong performance against the market attractiveness indicators but less good sustainability performance.</p> <p>Continue to safeguard for industrial and warehousing uses. Progress designation through Site Allocations DPD.</p>

PIWA code, name, ward, and size (hectares)	Site survey results	Sustainability assessment results <sup>1</sup>	Conclusion and Recommendation
	<p>BCC ownership. No residential proximity issues as PIWA is bounded by A4174 and open space.</p> <p>NB at the southern end of the PIWA boundary is an undeveloped part which remains as open space.</p>		
<p>PIWA0031 Novers Hill Industrial Area Filwood and Bedminster 12.89 ha</p>	<p>PIWA can be divided into two parts:</p> <p>1) Two industrial/trading estates in north-east part of the PIWA by Novers Hill:</p> <p>a) Barnack Trading Estate - approx 36 small industrial/warehousing units (good condition, 2 units vacant)</p> <p>b) Novers Hill Trading Estate – approx 10 medium sized industrial/warehousing units (fair condition, no vacancy)</p> <p>2) The rest of the PIWA contains a range of medium-sized industrial/warehousing buildings in a variety of uses (e.g. auto repairs, SITA depot) in good to fair condition, with some open storage operations in the northern part (condition not appropriate). The only vacancy was identified on a cleared site (formerly Jewson's). A collection of approx 10 small, poor condition (but occupied) industrial units was also identified in the eastern part of the PIWA (in BCC ownership).</p> <p>PIWA abuts A4174 Hartcliffe Way providing good access to A38 and A3029 (for Brunel Way and A4 Portway). Southern half in BCC ownership. Some residential proximity issues in northern part of PIWA but generally limited as PIWA is mostly bounded by</p>	<p>Accessibility Grade: D IMD10%: No IMD20%: Yes Jobs/Workforce ratio: 0.6-1.9 Neighbourhood Renewal Area: Yes South Bristol: Yes Flood Zone 3: Yes Local Plan environmental designations: Yes</p>	<p>Strong performance against the majority of both market attractiveness and sustainability indicators.</p> <p>Continue to safeguard for industrial and warehousing uses. Progress designation through Site Allocations DPD.</p>

PIWA code, name, ward, and size (hectares)	Site survey results	Sustainability assessment results <sup>1</sup>	Conclusion and Recommendation
	A4174 and open space.		
PIWA0032 Bishopsworth/ Cater Road Trading Estate Hartcliffe 16.27 ha	<p>Two parts to PIWA:</p> <p>1) Area to north of Cater Road: includes a range of medium sized industrial/warehouse buildings in a mix of uses (e.g. Somerfield distribution building, security shutter manufacturer, telecoms light industrial/depot operations) in mostly good condition (one identified as fair) and no vacancy. This area also includes Baker's Park industrial/warehouse building containing approx 15 small-medium units in good condition with no vacancy. Recent investment is evidenced by a new industrial/warehouse building recently completed (but vacant) in north of this area.</p> <p>2) Area to south of Cater Road: contains a range of small, medium and large sized industrial/warehouse buildings in good to fair condition. Vacancy identified on only two sites. Also, a retail superstore occupies a large site opposite Hareclive Road.</p> <p>PIWA is on Whitchurch Lane providing good access to A38 in the west and southern ring road (A4174) in the east. Some residential proximity issues for properties in north of PIWA bounded by back gardens of Brookdale Road but otherwise limited as PIWA bounded by Whitchurch Lane and allotments. BCC ownership at eastern part of PIWA, east of Cater Road.</p>	Accessibility Grade: D IMD10%: Yes IMD20%: No Jobs/Workforce ratio: 0.3-1.4 Neighbourhood Renewal Area: Yes South Bristol: Yes Flood Zone 3: Yes Local Plan environmental designations: Yes	<p>Very strong performance against the majority of both market attractiveness and sustainability indicators.</p> <p>Continue to safeguard for industrial and warehousing uses. Progress designation through Site Allocations DPD.</p>
PIWA0033	PIWA dominated by Matthew Clark/Constellation Europe	Accessibility Grade: D	Good performance against the

<b>PIWA code, name, ward, and size (hectares)</b>	<b>Site survey results</b>	<b>Sustainability assessment results<sup>1</sup></b>	<b>Conclusion and Recommendation</b>
Whitchurch Trading Estate Hengrove 8.81 ha	<p>industrial/warehouse buildings including office element (good condition, no vacancies). Eastern end of PIWA also contains two fair condition occupied medium-sized industrial/warehouse buildings.</p> <p>PIWA is on Whitchurch Lane providing good access to southern ring road (A4174) in the west and A37 to the east. No residential proximity constraints as PIWA bounded by open space. BCC appears to own the eastern two-thirds of the Matthew Clark site.</p>	<p>IMD10%: No  IMD20%: No  Jobs/Workforce ratio: 1.2  Neighbourhood Renewal Area: Yes  South Bristol: Yes  Flood Zone 3: No  Local Plan environmental designations: Yes</p>	<p>majority of market attractiveness but more mixed sustainability performance.</p> <p>Continue to safeguard for industrial and warehousing uses. Progress designation through Site Allocations DPD.</p>
PIWA0034 Hengrove Park Estate Hengrove 5.49 ha	<p>Western part of PIWA contains new 'excellent' condition industrial/warehousing buildings occupied by Formpro Mail Marketing. Eastern part contains 3 medium-large sized good condition industrial/warehousing buildings, no vacancies. Adjacent to southern ring road A4174 providing good access to A38/A37. PIWA in BCC ownership.</p>	<p>Accessibility Grade: D  IMD10%: No  IMD20%: No  Jobs/Workforce ratio: 0.8  Neighbourhood Renewal Area: Yes  South Bristol: Yes  Flood Zone 3: No  Local Plan environmental designations: No</p>	<p>Strong performance against the majority of both market attractiveness and sustainability indicators.</p> <p>Continue to safeguard for industrial and warehousing uses. Progress designation through Site Allocations DPD.</p>
PIWA0035 Central Park Business Centre Hengrove 4.15 ha	<p>PIWA contains approx 35 industrial units ranging in size from small to large in fair condition with 5 units vacant. Also features approx 2 small office buildings in good condition with one vacant.</p> <p>The north and west part of the PIWA are adjacent to the back gardens of residential properties in Leda Avenue although there is</p>	<p>Accessibility Grade: D  IMD10%: No  IMD20%: No  Jobs/Workforce ratio: 0.6-1.2  Neighbourhood Renewal Area: Yes</p>	<p>Strong performance against the majority of both market attractiveness and sustainability indicators.</p> <p>Continue to safeguard for industrial and warehousing uses. Progress</p>

<b>PIWA code, name, ward, and size (hectares)</b>	<b>Site survey results</b>	<b>Sustainability assessment results<sup>1</sup></b>	<b>Conclusion and Recommendation</b>
	some buffering with mature tree cover. Fewer constraints to east and south as PIWA is bounded here by school, open space and Petherton Road. Access not ideal given location of PIWA in largely residential area however close to A4174 Hengrove Way providing good access to A37/A38. No BCC ownership.	South Bristol: Yes Flood Zone 3: No Local Plan environmental designations: No	designation through Site Allocations DPD.
PIWA0036 Avonmouth - Rockingham Gate Avonmouth 50.75 ha	Most of PIWA is hardstanding used for storage of Honda cars so not appropriate to provide condition assessment. Remainder of PIWA consists of a terrace of four 'excellent' new, fully occupied industrial/warehousing units on site fronting Smoke Lane south of Lawrence Weston Road. Good access to A403 for M4, M49.	Accessibility Grade: E IMD10%: No IMD20%: Yes Jobs/Workforce ratio: 6.1 Neighbourhood Renewal Area: No South Bristol: No Flood Zone 3: Yes Local Plan environmental designations: Yes	Like all Avonmouth PIWAs, it generally performs poorly against sustainability indicators but scores well against market attractiveness indicators (e.g. high occupancy, good physical condition, good access to road network).  Continue to safeguard for industrial and warehousing uses. Progress designation through Site Allocations DPD.
PIWA0037 io Centre/Cabot Park Avonmouth 6.50 ha	The Cabot Park part of this PIWA has been partly developed out with new 'excellent' condition mainly large distribution premises (e.g. Robert Wiseman dairies). In northern area of PIWA boundary is the io Centre of 12 fully occupied medium industrial and warehousing units. Next to the io Centre is the newly built St Martin's Industrial Park containing 10 newly built vacant industrial units. Good access via Poplar Way East to A403.	Accessibility Grade: E IMD10%: No IMD20%: Yes Jobs/Workforce ratio: 6.1 Neighbourhood Renewal Area: No South Bristol: No Flood Zone 3: Yes	Same conclusion and recommendation as PIWA0036 above.

PIWA code, name, ward, and size (hectares)	Site survey results	Sustainability assessment results <sup>1</sup>	Conclusion and Recommendation
	NB PIWA boundary/record needs clarifying/amending (it is currently only a small '02 Survey boundary but a much wider boundary covering the rest of Cabot Park is identified on the 2003 Proposed Alterations Maps).	Local Plan environmental designations: Yes	
PIWA0038 Tramway Brislington West 3.32 ha	<p>PIWA can be divided into two halves:</p> <p>1) East of Tramway Road is now used for retail superstores and a nursing home.</p> <p>2) West of Tramway Road consists of a vacant poor condition industrial/warehouse building (with a significant office element) fronting Bath Road. At the rear is storage land (uncertain whether still being used).</p> <p>The PIWA is adjacent to the A4 Bath Road and has good access to nearby A4320 St Phillips Causeway. There are residential proximity issues to the north as the PIWA is adjacent to the terraced houses of Bath Road/Belmont Road. Fewer constraints to the south as there is more buffering to residential properties by back gardens and from the dismantled railway. No BCC ownership.</p>	<p>Accessibility Grade: C  IMD10%: No  IMD20%: No  Jobs/Workforce ratio: 0.4-0.8  Neighbourhood Renewal Area: No  South Bristol: Yes  Flood Zone 3: No  Local Plan environmental designations: No</p>	<p>Good performance against sustainability indicators (i.e. good public transport accessibility, within an area with a low jobs/workforce ratio and few environmental constraints) but much less strong performance regarding market attractiveness of remaining Class B-use employment buildings (i.e. vacant, poor quality buildings).</p> <p>On balance, it is considered that the physical constraints mean that it would not be appropriate for this area to be designated as 'strategically important' industrial and warehousing land. Do not progress designation through Site Allocations DPD.</p>
PIWA0039 Winterstoke Road	<p>PIWA can be divided into two halves:</p> <p>1) To the east of Winterstoke Road (west of Bristol City Football</p>	<p>Accessibility Grade: C/D  IMD10%: No  IMD20%: No</p>	<p>Generally strong performance against market attractiveness indicators but less good sustainability performance.</p>

<b>PIWA code, name, ward, and size (hectares)</b>	<b>Site survey results</b>	<b>Sustainability assessment results<sup>1</sup></b>	<b>Conclusion and Recommendation</b>
<p>Bedminster and Southville 9.52 ha</p>	<p>Ground): retail uses (e.g. South Bristol Retail Park) dominate this area. Only the northern third contains Use Class B-uses including Braby (silo manufacturers in good condition industrial buildings with office element).</p> <p>2) To the west of Winterstoke Road: north of Baron's Close is the 4-unit South Bristol Trade Park (small-medium sized trade warehouse units in good condition and one vacant); south of Baron's Close are Brunel Ford auto sales and repairs (excellent condition) and Imperial Tobacco (office and industrial buildings in good condition, fully occupied).</p> <p>The PIWA is on A3029 (Winterstoke Road) providing good access to A370 and Brunel Way for A4 Portway. No obvious residential proximity issues as PIWA is bounded by A-road, Bristol City Football Ground and rail line buffering. No BCC ownership.</p>	<p>Jobs/Workforce ratio: 1.2-2.3 Neighbourhood Renewal Area: No South Bristol: Yes Flood Zone 3: Yes Local Plan environmental designations: Yes</p>	<p>Continue to safeguard for industrial and warehousing uses but a revised boundary designation should be taken through the Site Allocations DPD to reflect recent non-Class B use employment development.</p>
<p>PIWA0040 Upper Easton Easton and Lawrence Hill 13.26 ha</p>	<p>Overall, good to fair condition of buildings with low vacancy; very close to Lawrence Hill roundabout providing excellent access to M32 and A4 via St Phillips Causeway (A4320). There are generally very few residential proximity constraints as the main part of the PIWA is bounded by A-roads, rail line and schools. There are however a small number of residential properties within the northern part of the PIWA in particular in area 5) below.</p> <p>PIWA can be split into five parts: 1) Area to east of rail line and Lawrence Hill Station: Contains a mixture of medium sized industrial/warehouse</p>	<p>Accessibility Grade: A-C IMD10%: Yes IMD20%: No Jobs/Workforce ratio: 0.5-3.2 Neighbourhood Renewal Area: Yes South Bristol: No Flood Zone 3: No Local Plan environmental designations: Yes</p>	<p>Very strong performance against both sustainability and market attractiveness indicators.</p> <p>Continue to safeguard for industrial and warehousing uses. Progress designation through Site Allocations DPD.</p>

PIWA code, name, ward, and size (hectares)	Site survey results	Sustainability assessment results <sup>1</sup>	Conclusion and Recommendation
	<p>buildings in good condition and no vacancy.</p> <p>2) Area to west of rail line and east of Bath/Bristol cycle path: This part of the PIWA dominated by building supplies/trade warehouse operations (good condition) and associated storage land. Also contains Berkeley Court - approx 5 small industrial/trade warehouse units, good condition and 1 unit vacant.</p> <p>3) Area to west of Bath/Bristol cycle path: This part includes BCC owned bus depot (fair condition of buildings, no vacancy) and a group of large industrial/warehousing buildings (fair condition and part vacant). Also includes 5 storey Berkeley House office block (fair condition, no vacancy); Circuit 32 – approx 15 small industrial/warehouse units (good condition and no vacancy); Lawnwood Industrial Units - 7 small industrial/warehousing units (fair condition, 1 unit vacant).</p> <p>4) Area to west of Easton Road/Bannerman Road In the area bounded by St Gabriels Road/Bouverie Street/Felix Road is: Easton Business Centre - approx 70 small office/industrial units (BCC owned, excellent condition, no vacancy); St Gabriel Business Park (approx 7 small industrial/warehousing units (good condition, no vacancy). Area also includes a collection of medium sized industrial/warehousing buildings (fair condition, part vacant) adjacent to St Gabriels Road. NB this area is not identified in either the 1997 or 2003 Local Plan Proposals Maps but was surveyed by BCC in 2002. Consider designation through Site Allocations DPD.</p> <p>5) Area to north of Easton Road and south of Westbourne Road</p>		

PIWA code, name, ward, and size (hectares)	Site survey results	Sustainability assessment results <sup>1</sup>	Conclusion and Recommendation
	<p>Contains a mixture of medium sized industrial/warehousing buildings in a range of uses (inc auto repairs) in fair condition and no vacancy. NB this area is not identified in either the 1997 or 2003 Local Plan Proposals Maps but was surveyed by BCC in 2002. Consider designation through Site Allocations DPD.</p>		
<p>PIWA0041 Central Trading Estate Brislington West 7.64 ha</p>	<p>PIWA can be split into three parts:</p> <p>1) Western end of PIWA contains approx 31 small workspace and 4 live/work units in good condition with 2 vacant (part of the 'Paintworks' development)</p> <p>2) Central part contains medium-sized industrial/warehouse buildings (including those occupied by Endemol TV studios) in fair to poor condition with 30-40% vacancy and open storage land. This is also part of the 'Paintworks' development.</p> <p>3) Eastern end is occupied by auto sales and repairs buildings (including Bryan Brothers) in good condition and no vacancy. (NB the far eastern part of this is not identified in either the 1997 or 2003 Local Plan Proposals Maps but was surveyed by BCC in 2002. Consider designation through Site Allocations DPD.)</p> <p>PIWA is adjacent to A4 for city centre and A37 and A4320 (St Philips Causeway) for M32. Very few residential proximity issues as PIWA is mostly bounded by River Avon to the north, A4 Bath Road and a cemetery. Only at eastern end are there some constraints with neighbouring properties to the south of the Bryan Brothers site. No BCC ownership. Severe HGV access and</p>	<p>Accessibility Grade: B/C IMD10%: No IMD20%: No Jobs/Workforce ratio: 0.8 Neighbourhood Renewal Area: No South Bristol: Yes Flood Zone 3: Yes Local Plan environmental designations: Yes</p>	<p>Relatively poor performance against market attractiveness and sustainability indicators for western and central parts of the PIWA. On balance, it is considered that the physical constraints mean that it would not be appropriate for these part of the PIWA to be designated as 'strategically important' industrial and warehousing land. Do not progress through the Site Allocations DPD.</p> <p>The eastern end of the PIWA performs much more strongly against the market attractiveness and sustainability indicators. Continue to safeguard for industrial and warehousing uses. Progress through the Site Allocations DPD.</p>

<b>PIWA code, name, ward, and size (hectares)</b>	<b>Site survey results</b>	<b>Sustainability assessment results<sup>1</sup></b>	<b>Conclusion and Recommendation</b>
	manoeuvrability constraints to western and central parts of the PIWA.		
PIWA0042 Gatehouse Centre Hartcliffe 1.01 ha	Small PIWA containing some non-Use Class B uses (e.g. community facilities and retail space) but also the Gatehouse Centre of approx 14 small light industrial units in good condition and no vacancy. Close to southern ring road (Hengrove Way) for access to A38 and A37. In BCC ownership.	Accessibility Grade: D IMD10%: Yes IMD20%: No Jobs/Workforce ratio: 1.3 Neighbourhood Renewal Area: Yes South Bristol: Yes Flood Zone 3: No Local Plan environmental designations: Yes	Strong performance against both market attractiveness and sustainability indicators.  This PIWA was not identified in either the 1997 or 2003 Local Plan Proposals Maps but was surveyed by BCC in 2002. Consider designation for industrial and warehousing uses through Site Allocations DPD.
PIWA0043 Hawkfield Business Park Whitchurch Park 9.30 ha	Southern part of PIWA dominated by large industrial buildings (with office element) occupied by Amcor Flexibles (good condition, no vacancy). Central part includes Septimus Buildings (7 small industrial units, good condition, 2 vacant); Icarus House - 2 storey office building (good condition, no vacancy); Axis – 9 small industrial units (good condition, 1 vacant).  PIWA adjacent to A4174 southern ring road for good access to A38/A37. No residential proximity constraints as PIWA bounded by A-roads and open space. Only BCC ownership is in northern part of the PIWA, north of Osprey Court and currently open space.	Accessibility Grade: D IMD10%: No IMD20%: Yes Jobs/Workforce ratio: 1.2 Neighbourhood Renewal Area: Yes South Bristol: Yes Flood Zone 3: No Local Plan environmental designations: Yes	Strong performance against market attractiveness indicators and the majority of sustainability indicators.  Progress designation through Site Allocations DPD.

PIWA code, name, ward, and size (hectares)	Site survey results	Sustainability assessment results <sup>1</sup>	Conclusion and Recommendation
	NB to the east of the Local Plan PIWA boundary are two office developments – Osprey Court (approx 24 small units, good condition and 3 vacant) and Somerfield supermarket HQ (good condition, no vacancy). Consider for inclusion within Site Allocations DPD.		
PIWA0044 South Bristol Business Park Filwood 6.72 ha	Overall, PIWA is fully occupied and buildings in good condition; adjacent to A4174 southern ring road for good access to A38/A37. Few residential proximity constraints as PIWA bounded by A-roads and open space. No BCC ownership.  PIWA contains: Enterprise Trade Centre (mixture of approx 13 medium sized trade warehouse units, good condition, no vacancy); South Bristol Business Park (approx 21 small industrial units, good condition, no vacancy). Also includes a large, new excellent condition fully occupied industrial/warehouse building with office element at western end of PIWA. At eastern end is a large bus depot building including large storage/parking area (good condition, no vacancy).	Accessibility Grade: D IMD10%: Yes IMD20%: No Jobs/Workforce ratio: 1.2 Neighbourhood Renewal Area: Yes South Bristol: Yes Flood Zone 3: No Local Plan environmental designations: Yes	Generally very strong performance against both market attractiveness and sustainability indicators.  NB PIWA not allocated in 1997 Local Plan but identified on 2003 Proposed Alteration to the Local Plan – consider designating for industrial and warehousing uses through Site Allocations DPD.
PIWA0045 Brislington Trading Estate Brislington West and	Overall, large established industrial/trading estate. Physical condition identified as a mix of good and fair, with 2 classed as poor and 1 excellent. Concentrations of fair between Dixon Rd and Clothier Rd, in centre of cluster immediately to north of A4 and cluster to south of A4. Low level of vacancy - 1 small cluster in	Accessibility Grade: C-E IMD10%: No IMD20%: No Jobs/Workforce ratio: 0.3-4.4 Neighbourhood Renewal	Generally strong performance against both market attractiveness and sustainability indicators.  Continue to safeguard for industrial

<b>PIWA code, name, ward, and size (hectares)</b>	<b>Site survey results</b>	<b>Sustainability assessment results<sup>1</sup></b>	<b>Conclusion and Recommendation</b>
Brislington East 47.92 ha	small estate on eastern border. PIWA bordered by green space on east and west sides and residential to north and south. Good accessibility to A4 and northern ring road. Non Use Class B-uses (e.g. retail) have encroached parts of PIWA bordering A4.	Area: No South Bristol: Yes Flood Zone 3: No Local Plan environmental designations: No	and warehousing uses. Progress designation through Site Allocations DPD.
PIWA0046 South Liberty Lane Bedminster 4.98 ha	<p>PIWA incorporates Liberty Industrial Park – approx 14 medium-sized industrial/warehouse units (good condition, 3 units vacant). PIWA also includes Liberty House – 3 storey office building (good condition, no vacancy) and an area of open storage land at southern end to south of PIWA bounded by the rail line and dismantled rail line.</p> <p>Access not ideal along isolated South Liberty Lane (inc. restricted width rail bridge) but relatively close to Winterstoke Road for access to A370 and A38. No residential proximity issues as PIWA bounded by open space and rail lines. No BCC ownership.</p>	<p>Accessibility Grade: D IMD10%: No IMD20%: No Jobs/Workforce ratio: 2.3 Neighbourhood Renewal Area: No South Bristol: Yes Flood Zone 3: No Local Plan environmental designations: Yes</p>	<p>Generally strong performance against market attractiveness indicators but less strong sustainability performance.</p> <p>Continue to safeguard for industrial and warehousing uses. Progress designation through Site Allocations DPD.</p>
PIWA0047 Woodland Way Hillfields 1.49 ha	<p>PIWA consists of Lonsdale Business Centre (7 small-medium industrial and warehousing units, good condition and 1 vacant) and Avondale Business Centre (circa 50 small industrial units, good condition and no vacancy identified). No BCC ownership. Good screening and buffer to residential properties to east and north. Relatively good A-road connections to enable access to A4174 Ring Road.</p>	<p>Accessibility Grade: C IMD10%: No IMD20%: No Jobs/Workforce ratio: 0.4 Neighbourhood Renewal Area: No South Bristol: No Flood Zone 3: No Local Plan environmental</p>	<p>Generally good performance against both market attractiveness and sustainability indicators.</p> <p>NB This PIWA was identified in the 2003 Proposed Alterations only - consider designation for industrial and warehousing uses through the Site Allocations DPD.</p>

PIWA code, name, ward, and size (hectares)	Site survey results	Sustainability assessment results <sup>1</sup>	Conclusion and Recommendation
		designations: No	
PIWA0048 Romney Avenue Lockleaze 3.10 ha	<p>Significant central part of PIWA contains electricity generating plant as well as Electricity Company offices and warehouse (fair condition). Three other medium sized industrial and warehousing buildings in fair condition. No vacancies identified.</p> <p>Residential land uses adjacent to south and east of PIWA with buffering by mature tree cover. Rest of PIWA bounded by railway line to west and grassed area to north.</p> <p>PIWA is approximately 800 yards from Muller Road (B4469) which provides close access to either M32 Junction 2 or the A38 Gloucester Road.</p>	<p>Accessibility Grade: D  IMD10%: No  IMD20%: No  Jobs/Workforce ratio: 1.1  Neighbourhood Renewal Area: Yes  South Bristol: No  Flood Zone 3: No  Local Plan environmental designations: No</p>	<p>Generally good performance against both market attractiveness and sustainability indicators.</p> <p>Continue to safeguard for industrial and warehousing uses. Progress designation through Site Allocations DPD.</p>
PIWA0049 Dovercourt Road Lockleaze 6.47 ha	<p>PIWA can be divided into two parts:</p> <p>1) Northern half of PIWA is BCC Depot (BCC owned) mostly used as open storage but with buildings identified as being in poor condition. Residential to west of Depot and rail line to east.</p> <p>2) Bottom half of PIWA can be divided into two: the northern part is a mixture of good condition, occupied warehouse and auto repair premises and vehicle open storage; the southern part is now a B&amp;Q retail superstore and this part of the PIWA boundary was removed from the 2003 Proposed Alterations Map.</p> <p>Adjacent to B4469 which provide good close access to M32 junction 2.</p>	<p>Accessibility Grade: C  IMD10%: No  IMD20%: No  Jobs/Workforce ratio: 0.3-1.1  Neighbourhood Renewal Area: Yes  South Bristol: No  Flood Zone 3: No  Local Plan environmental designations: No</p>	<p>Strong performance against sustainability indicators (i.e. within both a Neighbourhood Renewal Area and an area with a low jobs/workforce ratio, plus has few environmental designation constraints) but less strong against market attractiveness (i.e. depot buildings identified as being in poor condition). On balance, continued designation appears valid, especially given the strategic context of the extreme difficulty in Bristol of replacing lost industrial and</p>

PIWA code, name, ward, and size (hectares)	Site survey results	Sustainability assessment results <sup>1</sup>	Conclusion and Recommendation
			warehousing land.  Continue to safeguard for industrial and warehousing uses. Progress designation through Site Allocations DPD.
PIWA0050 Muller Road Lockleaze 1.59 ha	PIWA incorporates a bus depot and Brunel Ford auto sales and repair buildings (both fair condition, no vacancy).  Constraining residential land uses identified only in far north-eastern part of PIWA boundary. Rest of PIWA is bounded by open space. PIWA is adjacent to B4469 (Muller Road) which provides good close access to the M32 Junction 2 and the A38 (Gloucester Road).	Accessibility Grade: B IMD10%: No IMD20%: No Jobs/Workforce ratio: 0.3-1.1 Neighbourhood Renewal Area: Yes South Bristol: No Flood Zone 3: No Local Plan environmental designations: No	Generally strong performance against both market attractiveness and sustainability indicators.  Continue to safeguard for industrial and warehousing uses. Progress designation through Site Allocations DPD.
PIWA0051 Radnor Bishopston 1.02 ha	This PIWA was identified in the 2002 Survey but was not taken forward to the 2003 Proposed Alterations maps. It has now been developed for residential.	N/A	1997 Local Plan designation no longer relevant. Do not progress through Site Allocations DPD.
PIWA0052 Southmead	Mixture of fully occupied small-medium sized industrial uses (e.g. builder's yard and tool makers) in fair condition although good	Accessibility Grade: B IMD10%: No	Generally mixed performance against both market attractiveness and

<b>PIWA code, name, ward, and size (hectares)</b>	<b>Site survey results</b>	<b>Sustainability assessment results<sup>1</sup></b>	<b>Conclusion and Recommendation</b>
Road Horfield 1.53 ha	condition on Southmead Road frontage. PIWA boundary surrounded by residential properties and new residential development in construction in south-west corner of PIWA. Close to A38 for M5 Junc 16.	IMD20%: No Jobs/Workforce ratio: 0.6 Neighbourhood Renewal Area: No South Bristol: No Flood Zone 3: No Local Plan environmental designations: No	sustainability indicators. On balance, designation would appear beneficial especially given the strategic context of the extreme difficulty in Bristol of replacing lost industrial and warehousing land.  This PIWA was only identified through the 2002 survey and so is not in 1997 Local Plan or the 2003 Proposed Alterations to the Local Plan. Consider including in the preparation of the Site Allocations DPD.
PIWA0053 Aerospace New Tech Southmead 20.60 ha	Aircraft-related industrial and warehousing buildings in good condition. Close to A38 providing good access to M5. No residential proximity issues.	Accessibility Grade: E IMD10%: No IMD20%: No Jobs/Workforce ratio: 0.4 Neighbourhood Renewal Area: Yes South Bristol: No Flood Zone 3: No Local Plan environmental designations: Yes	Generally strong performance against both market attractiveness and sustainability indicators.  This PIWA was not identified on the 1997 or 2003 Local Plan Maps - consider designating for industrial and warehousing uses through Site Allocations DPD.
PIWA0054 Henbury	Small PIWA on northern edge of BCC boundary. Good access via dualled A4018 to M5 junction. Containing two sites - one fair	Accessibility Grade: D IMD10%: No	Generally strong performance against both market attractiveness and

<b>PIWA code, name, ward, and size (hectares)</b>	<b>Site survey results</b>	<b>Sustainability assessment results<sup>1</sup></b>	<b>Conclusion and Recommendation</b>
Station Henbury 2.62 ha	condition (a builder's yard) the other good (trade warehouse). No vacancy. Western half of PIWA has adjacent residential land uses, rest of PIWA is bounded by rail line and open space.	IMD20%: Yes Jobs/Workforce ratio: 0.4 Neighbourhood Renewal Area: No South Bristol: No Flood Zone 3: Yes Local Plan environmental designations: No	sustainability indicators.  This PIWA boundary was only identified through the 2002 survey and is not on the 1997 Local Plan or 2003 Proposed Alterations maps - consider designating for industrial and warehousing uses through Site Allocations DPD.
PIWA0055 Cumberland Road Cabot 1.46 ha	Site not assessed as planning permission granted for demolition and change of use to mostly residential. Therefore will no longer contribute to city's stock of industrial and warehousing land and PIWA designation no longer relevant/appropriate.	N/A	1997 Local Plan designation no longer relevant. Do not progress through Site Allocations DPD.
PIWA0056 Albion Dock Cabot 2.42 ha	PIWA includes dockyard-related industrial/warehouse buildings (good condition, no vacancy) but also (BCC owned) Albion Dockside Industrial Estate – approx 10 small units (good condition, no vacancy) and a medium-large fair condition occupied industrial building (BCC owned).  Good access via adjacent A370 to nearby Brunel Way for A4 Portway, and A4 Bath Road. Some residential proximity issues as PIWA contains dwellings along Sydney Row and Hanover Place.	Accessibility Grade: B/C IMD10%: No IMD20%: No Jobs/Workforce ratio: 11.9 Neighbourhood Renewal Area: No South Bristol: No Flood Zone 3: No Local Plan environmental designations: No	Generally good performance against the majority of market attractiveness indicators but more mixed sustainability performance.  Continue to safeguard for industrial and warehousing uses. Progress designation through Site Allocations DPD.

PIWA code, name, ward, and size (hectares)	Site survey results	Sustainability assessment results <sup>1</sup>	Conclusion and Recommendation
PIWA0057 Riverside Southville 4.28 ha	<p>PIWA dominated by tannery and metal welding operations in fair condition industrial buildings, fully occupied. PIWA also contains ex-bond warehouse (BCC owned) occupied by Bristol Self Storage. Eastern and western extreme ends of PIWA occupied by non-employment uses (Petrol Stations and Riverside Garden Centre [BCC owned]). Few residential proximity issues as PIWA bounded by River Avon to north and busy A370 (Coronation Road).</p> <p>Close proximity to Brunel Way providing good access and subsequent links to A4 Portway and A370.</p>	Accessibility Grade: C IMD10%: No IMD20%: No Jobs/Workforce ratio: 2 Neighbourhood Renewal Area: No South Bristol: Yes Flood Zone 3: Yes Local Plan environmental designations: Yes	<p>Good performance against market attractiveness indicators but more mixed sustainability performance.</p> <p>Continue to safeguard for industrial and warehousing uses. Progress designation through Site Allocations DPD.</p>
PIWA0058 Lodge Causeway Hillfields 6.36 ha	<p>PIWA consists of:</p> <ol style="list-style-type: none"> <li>1) Lodge Causeway Trading Centre – terrace of 7 medium-large sized industrial and warehousing units (good condition, 1 vacant)</li> <li>2) Balaclava Industrial Estate – 7 small industrial units (good condition, no vacancy)</li> <li>3) Avon Business Park - approx 20 small industrial units (good condition, 3 vacant)</li> <li>4) Three medium-large sized industrial and warehousing operations (Trade Counter, auto repairs, timber yard) in good condition and no vacancy.</li> </ol> <p>PIWA is on Lodge Causeway approximately 400 yards from A432 (Fishponds Road) which provides reasonably good access to the M32 Junction 2 via the Muller Road link.</p>	Accessibility Grade: C IMD10%: No IMD20%: No Jobs/Workforce ratio: 1.3-1.4 Neighbourhood Renewal Area: No South Bristol: No Flood Zone 3: No Local Plan environmental designations: Yes	<p>Generally mixed performance against both market attractiveness and sustainability indicators. On balance, continued designation appears appropriate in view of high occupancy and good condition plus the strategic context of the extreme difficulty in Bristol of replacing lost industrial and warehousing land.</p> <p>Continue to safeguard for industrial and warehousing uses. Progress designation through Site Allocations DPD.</p>

<b>PIWA code, name, ward, and size (hectares)</b>	<b>Site survey results</b>	<b>Sustainability assessment results<sup>1</sup></b>	<b>Conclusion and Recommendation</b>
	The PIWA is within a residential area with only the northern boundary unconstrained by adjacent residential land uses. Access and circulation is also not ideal given narrow entrances through often residential streets.		
PIWA0059 Courage Brewery Lawrence Hill 2.40 ha	This PIWA was not surveyed as planning permission has been granted for mixed use redevelopment. Therefore will no longer contribute to city's stock of industrial and warehousing land and PIWA designation no longer relevant/appropriate.	N/A	1997 Local Plan designation no longer relevant. Do not progress through Site Allocations DPD.
PIWA0060 Anvil Street Lawrence Hill 1.66 ha	This PIWA has been cleared for redevelopment as part of Temple Quay area mixed-use proposals. Therefore PIWA designation no longer relevant/appropriate.	N/A	1997 Local Plan designation no longer relevant. Do not progress through Site Allocations DPD.
PIWA0061 Station Way, Fishponds Frome Vale 1.47 ha	New 'excellent' condition collection of medium sized warehouse/trade warehouse and auto repairs premises with no vacancy. No BCC ownership. Close to the A432 providing good access to the M32 and A4320 (Spine Road) via Muller Road link to M32 Junction 2 roundabout. Adjacent residential land uses to north of PIWA although buffered by mature tree cover. South of PIWA is cycle path.	Accessibility Grade: C IMD10%: No IMD20%: No Jobs/Workforce ratio: 1.4 Neighbourhood Renewal Area: No South Bristol: No Flood Zone 3: Yes Local Plan environmental designations: No	Good performance against the majority of market attractiveness indicators but less strong sustainability performance.  Continue to safeguard for industrial and warehousing uses. Progress designation through Site Allocations DPD.

PIWA code, name, ward, and size (hectares)	Site survey results	Sustainability assessment results <sup>1</sup>	Conclusion and Recommendation
PIWA0062 Chittening Avonmouth 82.40 ha	<p>PIWA covers large area from north of railway line at Smoke Lane in its southern section to, in the north, the edge of BCC boundary north of Severn Road. All of PIWA in BCC ownership. Close to A403 (Severn Road) therefore good access to M49/M5.</p> <p>1) Southern section: Smoke Lane area contains a cluster of 4 occupied, mostly good condition large warehousing units.            2) Middle section: west of Chittening Road incorporates Chittening Trading Estate - mixture of small to large industrial and warehousing units (circa 40-50 buildings), generally good condition and no vacancy identified.            3) Northern section: East of Chittening Road is the SeValco Chemical Works – not appropriate to provide condition assessment because of specialist use. To the north of SeValco is Seabank Power Station - again difficult to provide condition assessment due to specialist use. Significant areas of land within the PIWA in this northern section are undeveloped, greenfield sites.</p>	Accessibility Grade: E IMD10%: No IMD20%: Yes Jobs/Workforce ratio: 6.1-7.1 Neighbourhood Renewal Area: No South Bristol: No Flood Zone 3: Yes Local Plan environmental designations: No	<p>Like all Avonmouth PIWAs, it generally performs poorly against sustainability indicators but scores well against market attractiveness indicators (e.g. high occupancy, good physical condition, good access to road network).</p> <p>Continue to safeguard for industrial and warehousing uses. Progress designation through Site Allocations DPD.</p>
PIWA0063 Sewage Avonmouth 36.69 ha	<p>Sewage works. Condition assessment not appropriate because site contains mainly specialist use plant and storage areas.</p>	Accessibility Grade: E IMD10%: No IMD20%: No Jobs/Workforce ratio: 6.1-7.1 Neighbourhood Renewal Area: No South Bristol: No	<p>Specialist use PIWA whose use is still required.</p> <p>Continue to safeguard for industrial and warehousing uses. Progress designation through Site Allocations DPD.</p>

PIWA code, name, ward, and size (hectares)	Site survey results	Sustainability assessment results <sup>1</sup>	Conclusion and Recommendation
		Flood Zone 3: Yes Local Plan environmental designations: Yes	
PIWA0064 Kingsweston Lane Avonmouth 154.58 ha	<p>PIWA covers large area from north of Third Way in south to Albermarle Chemical Works on Smoke Lane in the north. Only BCC ownership in very south eastern section of PIWA incorporating Haslemere Trading Estate. Good access to A403 and therefore to M5 and A4 Portway.</p> <p>1) Southern section includes mostly good condition medium and small-sized unit trading estates with relatively low vacancy (e.g. 15 unit St Andrew's Trading Estate has 4 units vacant; International Trading Estate 2 of 8 units vacant).</p> <p>2) Middle section contains heavier industrial operations (inc waste transfer and recycling uses) with fair quality condition of buildings, some bordering on poor but very low vacancy. Further north is the Rhodia Chemical Works site (not appropriate to assess condition due to specialist use) plus an undeveloped part of Cabot Park.</p> <p>3) North section of PIWA contains:            Severnside Trading Estate - 17 small industrial units (good condition, 4 vacant) fronting St Andrews Road plus approximately 45 small-medium sized industrial and warehousing buildings around Burcott and Dean Roads (good to fair condition and 6 units vacant).</p>	Accessibility Grade: E IMD10%: No IMD20%: Yes Jobs/Workforce ratio: 6.1-7.1 Neighbourhood Renewal Area: No South Bristol: No Flood Zone 3: Yes Local Plan environmental designations: Yes	<p>Like all Avonmouth PIWAs, it generally performs poorly against sustainability indicators but scores well against market attractiveness indicators (e.g. high occupancy, good physical condition, good access to road network).</p> <p>Continue to safeguard for industrial and warehousing uses. Progress designation through Site Allocations DPD.</p>

<b>PIWA code, name, ward, and size (hectares)</b>	<b>Site survey results</b>	<b>Sustainability assessment results<sup>1</sup></b>	<b>Conclusion and Recommendation</b>
PIWA0065 St Brendans Avonmouth 10.19 ha	Two parts to the PIWA, split by St Brendan's Way: 1) Northern part: mainly large, good condition distribution units (only 1 of 7 units vacant). 2) Southern part of site is 'excellent' condition Costco trade warehouse. No BCC ownership. Good access as adjacent to M49/M5 junction.	Accessibility Grade: E IMD10%: No IMD20%: No Jobs/Workforce ratio: 3-7.1 Neighbourhood Renewal Area: No South Bristol: No Flood Zone 3: Yes Local Plan environmental designations: No	Same conclusion and recommendation as for PIWA0064 above.  Continue to safeguard for industrial and warehousing uses. Progress designation through Site Allocations DPD.
PIWA0066 St Andrews Road Avonmouth 32.09 ha	Long, narrow PIWA covering the western side of St Andrew's Road (A403) and Smoke Lane from St Andrew's Gate roundabout to Albermarle Chemical Works on Smoke Lane.  Overall, very low vacancy, fair/good condition of buildings and good access on to A403, M5 Junction 18 and A4, plus adjacent to St Andrew's Road rail station and BCC ownership in northern and middle areas.  1) Northern part of PIWA: evidence of recent investment at northern end of Smoke Lane (good bordering on excellent condition of buildings and no vacancy). Also, a six hectare undeveloped site, currently grassed over occupies very northern end of PIWA boundary.  2) Middle section: along Ironchurch Road fair condition of buildings	Accessibility Grade: E IMD10%: No IMD20%: No Jobs/Workforce ratio: 7.1 Neighbourhood Renewal Area: No South Bristol: No Flood Zone 3: Yes Local Plan environmental designations: Yes	Same conclusion and recommendation as for PIWA0064 above.  Continue to safeguard for industrial and warehousing uses. Progress designation through Site Allocations DPD.

<b>PIWA code, name, ward, and size (hectares)</b>	<b>Site survey results</b>	<b>Sustainability assessment results<sup>1</sup></b>	<b>Conclusion and Recommendation</b>
	<p>reflecting waste transfer and pallet storage operations.</p> <p>3) Southern part: includes St George's Industrial Estate containing good condition industrial/warehousing uses with no vacancy. Fair condition of buildings at southern end of PIWA adjacent to King Road Avenue perhaps reflecting container and pallet storage activities but no vacancy.</p>		
<p>PIWA0067 Bush Industrial Estate St George West 0.92 ha</p>	<p>7-unit terrace of medium sized industrial and warehousing buildings - good condition, 1 vacant unit. Includes trade warehouse uses. No BCC ownership. Residential properties adjacent to east, north and south. Very close to Chalks Road providing good access to A420 (Church Road) and St Phillips Causeway.</p>	<p>Accessibility Grade: B IMD10%: No IMD20%: No Jobs/Workforce ratio: 1.2 Neighbourhood Renewal Area: No South Bristol: No Flood Zone 3: No Local Plan environmental designations: No</p>	<p>Mixed performance against both market attractiveness and sustainability indicators. On balance continued designation appears appropriate, especially given the strategic context of the extreme difficulty in Bristol of replacing lost industrial and warehousing land.</p> <p>Continue to safeguard for industrial and warehousing uses. Progress designation through Site Allocations DPD.</p>
<p>PIWA0100 Island Trade Park Avonmouth 0.98ha</p>	<p>2003 Proposed Alterations PIWA. Contains mixture of office and trade warehouse uses, fully occupied, excellent condition. Adjacent to M5/M49 junction.</p>	<p>Accessibility Grade: E IMD10%: No IMD20%: No Jobs/Workforce ratio: 3 Neighbourhood Renewal</p>	<p>Like all Avonmouth PIWAs, it generally performs poorly against sustainability indicators but scores well against market attractiveness indicators (e.g. high occupancy, good</p>

PIWA code, name, ward, and size (hectares)	Site survey results	Sustainability assessment results <sup>1</sup>	Conclusion and Recommendation
		Area: No South Bristol: No Flood Zone 3: Yes Local Plan environmental designations: No	physical condition, good access to road network).  This PIWA was identified in the 2003 Proposed Alterations - consider designation for industrial and warehousing uses through Site Allocations DPD.

**Table of descriptions used by site surveyors to assess and grade the physical condition of buildings**

Condition	Definition
Excellent	<p><b>Building appears to be new with no or very little signs of wear.</b> Things to look for:</p> <ul style="list-style-type: none"> <li>• External joinery etc. will all be newly decorated.</li> <li>• Masonry will have smooth, clean joints with no signs of cracking, spreading, unevenness or other deterioration and there will be no staining or any other marks to any elevation.</li> <li>• Buildings will appear very clean and tidy, with any hardstanding areas (of whatever finish) being level and smooth throughout with no vegetation growth other than to landscaped areas.</li> </ul>
Good	<p><b>Building shows signs of several years of wear and tear.</b> Things to look for:</p> <ul style="list-style-type: none"> <li>• There will be signs of general use, such as wearing to heavily trafficked areas.</li> <li>• Any as-built 'defects' are likely to be evident by this stage: for example there may be minor shrinkage cracking around joints to masonry.</li> <li>• Decorations are likely to be in reasonable order, however; heavily used components will be marked and / or scuffed etc.</li> </ul>
Fair	<p><b>Building shows extensive signs of wear and tear across its entirety.</b> Things to look for:</p> <ul style="list-style-type: none"> <li>• it will have been subject to, say, 10+ years of use with little, or no attempt at refurbishment.</li> <li>• Most areas will be heavily worn, decorations will be in poor condition – for example flaking, peeling paint etc. leading to localised failure of joinery etc. There may be some substantial (over 20mm) cracking around openings and other likely weak points.</li> <li>• Hard standing areas may be suffering from moderate vegetation growth.</li> </ul>
Poor	<p><b>Building is at an advanced stage of disrepair.</b> Things to look for:</p> <ul style="list-style-type: none"> <li>• It may be unoccupied and may have been subject to vandalism – for example broken windows etc.</li> <li>• Unlikely to be wind and water tight and likely to be suffering with heavy vegetation growth to all areas.</li> </ul>

## **A2 SIC CLASSIFICATIONS USED TO DERIVE FLOORSPACE REQUIREMENTS**

The table below highlights Standard Industrial Classification codes (SIC codes) used in this study to derive floorspace requirements from jobs growth forecasts. Codes relate to the 2003 SIC structure.

<b>PROPERTY TYPE</b>	<b>SIC CODES USED TO DETERMINE FLOORSPACE REQUIREMENTS</b>
OFFICE	65, 66, 67, 70, 72, 75, 642, 741, 742, 743, 744, 745, 804, 7485, 7486, 7487
INDUSTRIAL	15-21, 23-37, 40, 90, 222, 223, 453, 454, 5020, 5040
WAREHOUSE	51, 6024, 6311, 6312, 6321, 6411, 6412

## **A3 ANALYSIS OF BRISTOL'S KEY SECTORS**

### **Introduction**

1. Bristol has a diverse economy with a wide range of economic sectors. This annex looks at a number of these sectors in more detail. They have been chosen because of factors such as their contribution to economic output, the number of people they employ, the profile they have themselves and how they contribute to the city's image and reputation and, finally, their growth potential.
2. The sectors chosen for further assessment are:
  - Aerospace and advanced engineering
  - Banking and insurance
  - Professional services
  - Creative industries
  - Environmental technologies and services
  - ICT and communications
  - Public administration
  - Wholesale and distribution.
3. This seeks to present:
  - A profile of the sector in Bristol
  - Drivers for growth
  - Potential scale of growth
  - Information on the type of space the sector is likely to need.
4. Growth projections in this annex are based on a forecast of economic growth in the West of England prepared by Cambridge Econometrics in July 2005 as it has not proved possible to derive sector forecasts from the 3 CE forecasts referred to in Section 4. They are used to give a sense of the scale of growth and trends in each individual sector<sup>10</sup>.

### **Aerospace and advanced engineering**

5. Bristol and the West of England have had for many years a strong track record in innovation and development within the aerospace and advanced engineering sector and is an internationally renowned centre of expertise in the sector. As the birthplace of Concorde, the world's first supersonic airliner, the Bristol conurbation is home to sector leaders such as Airbus, Rolls Royce, BAE Systems and MBDA. While based just outside the city council's boundary in Filton, South Gloucestershire, these companies are major employers employing thousands of people in the surrounding area and make a large contribution to raising the city's

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<sup>10</sup> Exceptions to this are the creative industries and environmental technologies and services sectors. It is not possible to derive projections for growth for these sectors from the July 2005 forecast because the forecast does not go down to the level of detail that would be necessary

profile. The city itself is home to a large number of suppliers to these companies, several of which – Oldland CNC for example – employ 100 people or more. The sector is strongly supported by the Universities of Bristol and the West of England, both of whom have close links with it and strengths in engineering.

6. Just over 18,000 people worked in the sector in the West of England in 2004 according to ABI statistics<sup>11</sup>. The number of people employed in the sector at the West of England level has declined since 1999, although the rate of fall appears to have tailed off since around 2002. This decline is mirrored in data for the smaller Bristol city area. Its share of West of England employment in this sector has fallen from approximately one quarter to one sixth over the period. Bristol's growth rate appears to have been more volatile than the West of England's with variation between growth and decline.
7. Nationally employment trends in the sector have broadly mirrored those in the West of England. In terms of future development, a government-sponsored report published in 2003 highlighted how the aerospace sector faces a number of challenges in the future. These include declining demand for products (a scenario which was expected to reverse in the long term), increasing global competition and the issue of aircraft emissions.<sup>12</sup> Technological development and adaptation will be key to the sector's long term success, as it drives aerospace's "ability to innovate"<sup>13</sup>.
8. A DTZ/AD Little report commissioned by SWERDA forecasts that employment in the sector will decline in the South West up to 2026. It suggests that losses are most likely in areas where significant concentrations of employment exist, including the West of England.<sup>14</sup> CE's July 2005 forecast suggests that sub-regional employment in this sector will fall by almost 5,000 jobs between 2006 and 2015.
9. Reports in the press, however, suggest that West of England jobs figures may be holding up in practice, at least in the short term. Rather than shed jobs, Airbus and Rolls Royce have confirmed the retention of existing job numbers following new investment in plant and technology.<sup>15</sup> It is unclear whether such developments are accounted for in the CE forecast.
10. Given that jobs in the sector is forecast to decline but evidence suggests that 2 major employers are retaining jobs rather than shedding them, it is

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<sup>11</sup> ONS Annual Business Inquiry

<sup>12</sup> An independent report on the future of the UK aerospace industry – executive summary, Aerospace Innovation and Growth Team, published by DTI June 2003 pages 6 and 7

<sup>13</sup> National Aerospace Technology Strategy Implementation Report, Aerospace Innovation and Growth Team, published by DTI page 9

<sup>14</sup> Spatial Dynamics of Change in the Key Sectors – a report for the South West of England Regional Development Agency, DTZ with AD Little, February 2005 page 33

<sup>15</sup> *Airbus' £300m investment set to be approved*, Bristol Evening Post 18 November 2005

clear that employment forecasts alone cannot be relied on to justify releasing land used by the aerospace and advanced engineering sector.

11. The DTZ/AD Little report suggests that changes in employment and counter trends in the sector's consumption of space will generate a different form of demand from the sector for sites and premises over the forecast period. A reduction in the need for large manufacturing plants will be matched with the growth of high value engineering and research and development operations. A decline in the total area required by the sector and a reduction in the need for B2 space is likely to occur at the same time as need grows for B1 research and development/light industrial space. The report suggests that the vacated B2 space may have the technological infrastructure required to support the development of new B1 space.<sup>16</sup>
12. This evidence suggests that the development of the sector plus a potential loss of jobs leading to new company creation may generate burgeoning demand for B1 space.
13. The sector may need to be monitored closely, so as to ensure that sufficient amounts of B2 and B1 space are provided at the right time to allow the sector to develop successfully.

### **Banking and insurance**

14. "Bristol has the third largest financial services sector outside London"<sup>17</sup> according to UK Trade and Investment, the Government's inward investment agency. The city has strengths in banking, mortgage provision, insurance, insurance broking and ethical finance. Industry leaders based in the Greater Bristol area include AXA Sun Life, Lloyds TSB, Royal Bank of Scotland, HBOS and Triodos Bank.
15. Approximately 24,000 people were employed in the banking and insurance sector in the West of England in 2004. Employment in the sector declined slightly in the late 1990s, but has grown slightly in the last few years. Jobs data suggests that the sector growth rate at the sub-regional level is increasing. Bristol's share of West of England employment appears to be falling, from four fifths in 1995 to approximately three fifths in 2004. The figures suggest that between 2001-2003 Bristol's banking and insurance sector has been shedding jobs.<sup>18</sup>
16. At national level the banking and insurance sector has performed strongly in recent years. UKTI highlights how the sector has witnessed "rapid expansion .... [growing] in current prices at an average of around 5

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<sup>16</sup> op.cit., pages 33 & 34

<sup>17</sup> Financial services opportunities in the UK, UK Trade and Investment

<sup>18</sup> Jobs data based on ONS Annual Business Inquiry amended by BCC Economic Regeneration to remove apparent systematic errors

per cent a year in the ten years to 2003”<sup>19</sup>. International, retail, investment and private banking sub-sectors have all seen growth. The broader financial services industry, of which banking and insurance is a key part, has grown at double the rate of the national economy for many years, now accounting “for around 10% of the UK’s Gross Domestic Product”<sup>20</sup>. Its productivity is over three times the national average, according to UKTI.

17. Evidence suggests that in recent years the banking and insurance sector has sought to offshore or outsource parts of its operations overseas. A 2005 publication on trends in the office sector summarised a number of recent offshoring decisions featuring companies based in the UK. 16 out of 23 companies cited were from this sector. Functions offshored included “call centre [services,] ..... back-office processing, administration, accounts, payroll and human resources”<sup>21</sup>. If the phenomenon continues, UK locations and operations will have to compete to retain the role of providing these services.
18. At a national level there are strong policy drivers for growth of this sector. The Government’s stated aim is “for UK financial and related business services to be even more successful”<sup>22</sup>. The strategy is founded on continuing and developing the strengths of London as an international financial centre and taking “full advantage of the depth of international expertise in the UK’s other financial clusters including ..... Bristol”<sup>23</sup>. Growth is expected in all aspects of financial service business, including retail, wholesale and inward investment-focused activity.
19. A recent Cambridge Econometrics forecast indicated that growth of the workforce in the West of England’s banking and insurance sector was expected to remain almost static between 2006-2015.<sup>24</sup> Forecast data is not available at the Bristol level but recent trends suggest falling employment. If this were to continue this would lead to a declining need for floorspace.
20. That said, the future of Bristol’s banking and insurance sector is less clear cut. Government is encouraging and seeking to facilitate growth in the sector nationally and Bristol is recognised and being marketed internationally as having strengths in this field.
21. In addition, Bristol has many of the attributes which make it an attractive location for the sector to do business. An HM Treasury paper<sup>25</sup> from

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<sup>19</sup> Financial services opportunities in the UK, UK Trade and Investment

<sup>20</sup> Financial Services Sector Advisory Board Working Document Number (06) 01, UK Trade and Investment page 3

<sup>21</sup> Property and the office economy, Dr Robert Harris, EG Books, 2005 page 256

<sup>22</sup> Financial Services Sector Advisory Board Working Document Number (06) 01, UK Trade and Investment page 5

<sup>23</sup> op.cit., page 5

<sup>24</sup> Cambridge Econometrics LEFM (UK Regional Economic Prospects), July 2005

<sup>25</sup> The UK financial services sector: Rising to the challenges and opportunities of globalisation, HM Treasury, 2005

2005 highlights factors that may make a location attractive as a relocation destination. It is reasonable to make the inference that these same factors will make a location attractive to its existing businesses. It notes how firms gain advantage from locating close to others in the same sector because a number of factors may come together to reduce their costs. These factors include:

- “the availability of factor inputs such as a pool of labour with a wide range of skills and innovative technologies;
- access to the knowledge network and information spillovers through which the latest industry thinking is being circulated;
- the need to be physically close to asset markets to tap their liquidity;
- access to infrastructure not available elsewhere; and
- the availability of intermediate goods, for example competing specialised suppliers that lower the transactions costs of business compared to other centres.”<sup>26</sup>

22. Although the analysis of the CE forecast implies a decline in employment in this sector in Bristol, Government’s policy emphasis on growth and the City’s existing strengths may create a favourable climate for growth. There is evidence to suggest that there may be opportunity for the sector to grow in Bristol.
23. The sector is most likely to require B1 office space. Anecdotal evidence suggests that good access – for customers and staff – is important to firms in this sector.<sup>27</sup>

### **Professional services**

24. Befitting Bristol’s long trading history and place as a national and regional economic powerhouse, the professional services sector is very strong in the city. Legal firms such as Osborne Clark, Beachcroft and Bevan Ashford – companies with a long local history and ever-increasing foothold in the national market – have their base here. International accountancy and business consultancy firms, such as KPMG, have a major presence. Professional services is a key growth sector in its own right and also plays a critical part in supporting the development of others. In addition, both of Bristol’s universities have strengths in law.
25. Data suggests that employment in the professional services sector in the West of England grew by almost a third between 1995-2004. The sector employed almost 36,000 people in the sub-region in 2004. Bristol’s share of this employment, approximately two thirds of the sub-regional total, has fallen only slightly in this period with the City enjoying almost continual growth in this sector over the same period.<sup>28</sup>

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<sup>26</sup> op.cit., page 29

<sup>27</sup> Based on anecdotal evidence from discussion with Bristol-based businesses in the sector during 2006

<sup>28</sup> Data from ONS Annual Business Inquiry amended to remove systematic errors by Bristol City Council Economic Regeneration

26. The professional services sector covers a broad range of disciplines. UKTI highlights how those firms providing key services to the financial services sector are performing well. The same paper notes how the UK has real strengths in accountancy, legal services, advertising and recruitment to name but a few sub-sectors. Management consultancy services are valued at over £10.1 billion and are “very successfully sustaining growth levels”.<sup>29</sup> It may be fair to infer from the UKTI paper that as the financial services sector grows it will require a growing professional services sector to support it.
27. The short term growth prospects of the sector are perceived to be good according to recent research by CBI and Grant Thornton<sup>30</sup>. That said, it noted that skills shortages may be a barrier to growth and that marketing firms are pessimistic about growth prospects following a fall in business both measured by value and volume.<sup>31</sup>
28. A study into the spatial requirements of certain key sectors carried out by Atkins for the South East of England Regional Assembly highlighted how the financial, business and professional services sectors had a tendency to agglomerate. Drivers behind the decision to agglomerate in particular locations included:
- Access to markets and suppliers
  - Availability of a large, diverse and skilled workforce
  - High quality transport infrastructure and capacity
  - Availability of high quality telecommunications infrastructure.<sup>32</sup>
29. CE’s July 2005 forecast suggests that the sector will grow by a significant margin in the West of England between 2005-2015. It forecasts the creation of 11,000 new jobs. Given Bristol’s predominance in this market, there may be potential for thousands of new jobs in the city. Predominantly B1 space will be required to accommodate this growth.<sup>33</sup> Informal dialogue with a number of Bristol companies operating in the sector has identified that good access – for customers and staff – is important to professional services firms.<sup>34</sup>

## **Creative industries**

30. Bristol has real strengths in this sector. The city “has the second highest concentration of creative industry employment among the English core cities as measured by employment location quotient”<sup>35</sup>. Approximately

<sup>29</sup> Financial services opportunities in the UK, UK Trade and Investment

<sup>30</sup> Service sector profits growing strongly – new survey from CBI & Grant Thornton, CBI news release, 8 December 2006

<sup>31</sup> *ibid.*

<sup>32</sup> Spatial requirements of key sectors in the South East – Final Report, Atkins for SEERA, 2004, page 4-10

<sup>33</sup> Assertion based on guidance in Employment Land Reviews: Guidance Note, ODPM, December 2004 page 93 Box D.1

<sup>34</sup> Based on anecdotal evidence from discussion with companies in the sector during 2006

<sup>35</sup> Regional Economic Strategy 2006-2015 evidence base, page 79

9,700 people were employed in creative industries in the city in 2004 and the sector has been claimed to be “more established than in other parts of the region, with a 12.8% growth in employment from 1998-2002 which is higher than the regional average”<sup>36</sup>. The sector is strongly supported by the University of the West of England, which itself has strengths in art, media and design.

31. Bristol enjoys a wealth of creative infrastructure, including the Watershed media centre, Arnolfini art gallery and Bristol Old Vic, to name but a few. The city is also home to the likes of the BBC Natural History Unit, Aardman Animations and Endemol, all media organisations with a national or international renown.
32. Nationally and locally the creative industries sector has seen strong growth. Recently released figures suggest that nationally the sector accounted for over 7% of UK GVA in 2004, with its workforce and GVA growing at a rate faster than seen in the national economy as a whole.<sup>37</sup>
33. Research carried out as part of the Creative Economy Programme (CEP), a DCMS sponsored initiative intended to inform the publication of a Green Paper on the subject later in the year, has identified the sector’s potential “strategic importance”<sup>38</sup> to the UK economy. This importance is driven by the possibility that “markets may continue to grow, creative talent and skills are more difficult to replicate and the UK’s creative base may attract large international companies to settle in the UK”<sup>39</sup>.
34. Recognising that the sector tends to generate value through ideas, the research also notes that the sector’s relative strengths lie in the work of individuals and SMEs. Larger firms and multinationals have an important role to play, helping to provide a platform for individuals and small organisations to take their ideas further by providing support through capital or resources and, importantly, offering a means of reducing the latter’s exposure to risks. At the same time, rapid technological change may drive forward changes in market structure as organisations may take advantage of new opportunities or have to restructure to meet increasing competition successfully.<sup>40</sup>
35. The CEP’s Infrastructure Working group has also pointed out that it is “the fabric of infrastructure available to creative businesses that informs their creative sense of place, which in turn affects their ability to innovate and grow. It is also the ways that infrastructure is connected together (through networks, co-location, a high quality public realm) as a single

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<sup>36</sup> SWRDA/Culture South West Creative Industries Mapping and Economic Impact Study 2004, quoted in The New Energy: Creative Industries Strategy for Bristol, Bristol City Council 2004

<sup>37</sup> Creative Industries Economic Estimates Statistical Bulletin, DCMS, September 2006

<sup>38</sup> Evidence and Analysis Working Group paper, Creative Economy Programme, 2006

<sup>39</sup> *ibid*

<sup>40</sup> “Comparative analysis of the UK’s creative industries – report to DCMS”, Frontier Economics, August 3 2006

“infrastructure offer” that influences the confidence and capacity of creative businesses.”<sup>41</sup>

36. The paper goes on to observe that it is the largest places – namely the Core Cities, which have a critical mass of creative infrastructure and good connections to other drivers of creativity – that will support the most growth. Here the potential of the core cities is second only to London and the South East. Driving forward growth in core cities and linking them to developments and opportunities in London will be key to the strong growth of the creative economy in the UK.<sup>42</sup>
37. Complementing policy objectives at the national and regional level, Bristol City Council’s Creative Industries Strategy seeks to encourage the growth and development of the sector. It has the following aims:
  - To increase the sustainability, growth and productivity of the Creative Industries and maximise their potential to contribute to the city’s prosperity
  - To maximise the potential for the Creative Industries to contribute towards the wide policy agendas of social, economic and cultural regeneration, education, social inclusion and community cohesion
  - To promote Bristol’s Creative Industries regionally, nationally and internationally and emphasise Bristol’s role as a competitive European City<sup>43</sup>.
38. Supportive policy at the national and local levels generate strong potential for growth. The creative industries are also a SWERDA priority sector.
39. The variety of activities the sector engages in suggest its spatial requirements are likely to be wide ranging and difficult to define. For instance, architects may need B1 office space on the one hand but artists using heavy machinery may require B1c or B2 floorspace.
40. The CEP Infrastructure Working Group also recommends interventions to encourage the development of the sector. One of these is to help create facilities with an environment which supports the generation of ideas, sharing of ideas and is of a character that supports and promotes creativity, as core components of new developments. It is known as the “creativity towers” concept. They should provide “concentrations of specialist creative workspace and activity space and prioritise affordability, flexibility, high quality design and connectivity to other creative infrastructures”<sup>44</sup>.
41. A number of existing and proposed developments in Bristol, such as the Watershed and Creative Depot at Temple Quay, include some or all of the characteristics highlighted in the “creativity towers” concept. It is

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<sup>41</sup> Infrastructure Working Group final report, Creative Economy Programme 2006

<sup>42</sup> op.cit.

<sup>43</sup> The New Energy: Creative Industries Strategy for Bristol, Bristol City Council 2004, page 1

<sup>44</sup> Infrastructure Working Group final report, Creative Economy Programme 2006

clear from the work of the Infrastructure Working Group that developments of this type should be encouraged as important contributions to the continued growth of the creative industries in Bristol.

42. As noted earlier, the research for the Creative Economy Programme also makes clear the importance of SMEs and individuals to the success of the creative economy. A third of all enquiries from individuals or organisations looking for workspace received by local authorities in the West of England between 2002-5 were for properties under 3,000 sq ft in size. A quarter of these were from the creative industries. As a result these local authorities have agreed a common priority around providing themed space for creative industries in the Greater Bristol area which will provide accommodation for organisations looking for up to 350 sq ft of space.<sup>45</sup>

### **Environmental technologies**

43. Bristol's environmental technologies sector constitutes a rich and diverse mix of high-technology knowledge based businesses, consultancies, industrial operations, lobbying groups, NGOs, service-based and educational organisations. Many of these businesses have links with a number of other significant sectors such as creative industries, advanced engineering and food and drink. Environmental sector organisations based in the city include nationally renowned ones such as the Soil Association and Sustrans, companies with a global reach such as Garrad Hassan and Partners and companies at the cutting edge of new technologies, e.g. Compact Power.
44. The environmental technologies sector in the West of England employed approximately 12,800 people in 2004<sup>46</sup>. Just under 50% of this employment was based in Bristol. According to ABI statistics employment in the sector appeared to have grown gradually but steadily in the sub-region since 2001, after a period of zero growth or slight contraction. This growth is broadly in line with national trends.
45. Nationally this sector is seen as having strong potential for growth. A recent study of emerging markets in the environmental industries sector prepared on behalf of the Government<sup>47</sup> has updated growth forecasts made by DTI's Joint Environmental Markets Unit in 2002 to account for its growth up to 2005. It projects that the UK environmental goods and services market "will grow from £25 billion in 2005 to £34 billion in 2010 (42% growth in 2005) and on to £46 billion by 2015"<sup>48</sup>.
46. The DTI/DEFRA study highlights that by 2015 waste management and recycling and water/wastewater treatment are likely to remain the largest

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<sup>45</sup> West of England Small Workspace Strategy 2005

<sup>46</sup> ONS Annual Business Inquiry

<sup>47</sup> Study of emerging markets in the environmental industries sector: executive summary, DTI/DEFRA, November 2006

<sup>48</sup> *ibid.*, page 6

sub-sectors by turnover. It also highlights the strong growth potential of a number of smaller sub-sectors, such as energy management, renewable energy, environmental consulting services and contaminated land remediation.<sup>49</sup> Drivers for this growth are likely to include environmental legislation, rising resource and commodity prices and the growing scarcity of resources. While development in new EU member states and developing economies (particularly China and India) will generate new opportunities, many will also come from technological advancement and innovation driven by countries which already have a high standard of environmental infrastructure such as the US, Japan and those in Western Europe.

47. Clear opportunities for business may also arise from potential occupiers increasingly wanting to locate in sustainable buildings, the development of and operation of which is BREEAM compliant<sup>50</sup>.
48. Bristol City Council has identified the enormous growth potential of the sector and set up the Bristol Environmental Technologies Sector development initiative (BETS) in 2006 to:
  - Facilitate the continued growth of the industry in the Bristol city region
  - Raise the profile of the sector to a national and international audience.<sup>51</sup>
49. In addition the Bristol Partnership has expressed its aspiration for the city to establish itself as a “European green capital”<sup>52</sup>.
50. In a report on the spatial implications of growth in the South West prepared by DTZ and Arthur D Little written to inform the development of the Regional Spatial and Economic Strategies, the authors identify the environmental technologies sector’s need for “high quality small and medium sized units which combine office and R&D/light industrial functions”<sup>53</sup>, namely B1 space. This is especially relevant to Bristol because a high proportion of the companies in this sector in the city employ 10 people or less. The report also highlighted how the sector is likely to show demand for both urban and rural locations, which in turn suggests that the provision of high quality space may be a determining factor in attracting demand to the city.
51. Evidence suggests that some small sized environmental technology organisations in Bristol may want to co-locate with each other. One third of companies that responded to a Bristol City Council questionnaire were

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<sup>49</sup> *ibid.*, page 7

<sup>50</sup> The Building Research Establishment’s Environmental Assessment Method provides a suite of tools for construction professionals to understand and mitigate the environmental impacts of the developments they design and build

<sup>51</sup> from Visitor Guide to the launch of the Bristol Environmental Technologies Sector development initiative, Bristol City Council June 2006

<sup>52</sup> from Bristol Green Capital: are you up to the challenge?, The Bristol Partnership 2007

<sup>53</sup> *ibid.*, page 46

sharing premises with other organisations.<sup>54</sup> This suggests that there may also be demand for high quality space that is larger than that needed by small companies alone or workplaces which support the clustering of bodies working in the same sector.

52. The DTZ/Arthur D Little report also highlights a need for the provision of waste management facilities in the South West in the light of Regional Waste Strategy policies, which encourages the region to gain more value from waste. The report highlights how “[w]aste management will require a range of sites, accommodating uses ranging from sorting of waste to incineration”<sup>55</sup> which itself will generate demand for B1, B2 and B8 space. Some activities carried out by the sector will be inappropriate to site in residential or other locations where image and ambience are important but, on the other hand, there is also a competing pressure to locate waste management as close as possible to where the waste is generated.
53. It is worth noting that the City Council has already identified Avonmouth as a potential key location for environmental industries. Its cheaper land values, availability of brownfield land and suitability for uses which would not be appropriately sited in or next to residential areas suggest that it may be capable of making a significant contribution to providing space for bad neighbour, waste management and renewable energy uses. The area’s potential capacity may be tempered, however, by a need for infrastructure improvements as well as biodiversity and flood risk constraints.<sup>56</sup>

### **ICT and communications**

54. Bristol and the West of England have for long had significant strengths in ICT and communications. Companies of global renown with a base in the area include Hewlett Packard, Orange Communications and Toshiba, whose European research headquarters are based in the heart of Bristol. Both of the city’s universities have strengths in computing.
55. In 2004 approximately 17,000 people were employed in the sector in the West of England, according to the ABI.<sup>57</sup> The sector doubled in size, in terms of the number of people employed, between 1995 and 2004. That said, evidence suggests that the growth rate had been in decline since around 1997. Analysis of the data for Bristol suggests that in the City Council area the sector has grown very gradually and that its share of West of England based employment has fallen since 1995.<sup>58</sup>

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<sup>54</sup> Environmental Technologies Sector Audit, November 2006 page 6

<sup>55</sup> *ibid.*, page 40

<sup>56</sup> Avonmouth: potential as a location for environmental industries, Bristol City Council informal briefing paper 2006

<sup>57</sup> ONS Annual Business Inquiry

<sup>58</sup> Findings based on analysis by BCC Economic Regeneration using ONS Annual Business Inquiry figures.

56. The evidence base for the South West Regional Economic Strategy 2006–2015 highlights how the sector has performed well at regional level in recent years and, in 1999/2000, grew to become the largest of the regional development agency's priority sectors. The sector is characterised by high investment levels, strong export performance and a large number of businesses. 1 in 70 companies in the Bristol area provides ICT support services.
57. The RES evidence base highlights some factors which may have helped support growth of this sector in recent years. Supply and demand for staff have been in equilibrium, good numbers of graduates have been available (a feature of the sector is its relatively young workforce) and the area has enjoyed a competitive advantage due to lower labour and premises costs.<sup>59</sup>
58. The continued health of this sector is key to the growth of other parts of the economy at all geographical levels. The modern, knowledge based economy relies on ICT and developments in technology to innovate and grow. The RES evidence base highlights a challenge for the region: its economy must become better at improving productivity through technological development and adaptation.<sup>60</sup> This is a challenge recognised at European level, which has prompted EU policies to be developed to take advantage of this massive opportunity.<sup>61</sup>
59. At the UK level, a recent Cabinet briefing paper has highlighted how technological innovation and diffusion would be a key driver of global economic change. Rapid technological change was likely to continue into the future. Predicting the change is difficult, but developments are expected in information handling and knowledge management, network interactions, sensors and tracking, security, advanced materials and robotics, nanotechnologies, body and mind sciences and energy.<sup>62</sup>
60. It is clear that the growth potential of this sector is recognised at international, national and regional level. More locally, CE forecast in July 2005 that the sector in the West of England would grow by approximately 1,000 jobs between 2005-2015. This translates very roughly into a 5% increase in employment.<sup>63</sup> A report prepared to inform the regional spatial and economic strategies highlights that the strongest growth in this sector will be in the ICT services and software development sub-sectors.<sup>64</sup> This growth is likely to be concentrated in

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<sup>59</sup> South West of England Regional Economic Strategy 2006-2015 evidence base, SWERDA, 2006 page 81

<sup>60</sup> *ibid.*, page 81

<sup>61</sup> EU High Level Group quoted in *i2010 – responding to the challenge*, Indepen for DTI, September 2005 page 1

<sup>62</sup> Strategic priorities for the UK: the Policy Review, background paper for Cabinet discussion of the policy review programme on 19 October 2006, Prime Minister's Strategy Unit slide 17

<sup>63</sup> Cambridge Econometrics LEFM (UK Regional Economic Prospects) July 2005

<sup>64</sup> Spatial dynamics of change in the key sectors – a report for the South West of England Regional Development Agency, DTZ with AD Little, February 2005

locations – like Bristol – where the sector already has a strong presence and there are strengths in creative industries.

61. A recent study carried out on behalf of DTI has emphasised the importance of UK ICT firms having a good understanding of the needs of their customers and working relationship with them. Close co-operation will be key to delivering the innovative solutions their customers need, as well as securing the future development of the sector in a marketplace where offshoring<sup>65</sup> – particularly in more back office functions – is likely to continue to grow.<sup>66</sup> This suggests that Bristol, with its strong customer and supplier base, may have potential for growth although it should be noted that the DTZ/AD Little report highlights that there is likely to be a trend for firms to seek locations outside the “more expensive central office districts”<sup>67</sup> of the major employment centres in the South West.
62. The DTZ/AD Little report also highlights infrastructure implications of the sector’s growth. In effect it indicates that the likes of Bristol, keen to maintain and enhance a successful ICT sector, will need to offer:
  - A large number of smaller sites. Organisations in this sector are less likely to require large scale sites and premises
  - High quality premises with broadband provision
  - Potential to co-locate or base themselves near to other bodies in the same sector
  - Potential to base themselves near to their customers
  - Good quality of life for staff
  - Increased provision of 3G base stations.<sup>68</sup>
63. DTZ/AD Little notes that B1 office space with high bandwidth infrastructure will be needed to support the growth of this sector.<sup>69</sup>

### **Public administration**

64. As well as being a major employer, the public administration sector makes a huge contribution to the local economy through the provision of essential services and infrastructure. Bristol City Council is the largest organisation in the sector both in the city and at West of England level. National organisations with a significant presence in Bristol city itself include DEFRA, Environment Agency, Planning Inspectorate, Government Office for the South West, Highways Agency and Ofsted. Capita, a private sector company providing services on behalf of the public sector, also has a major base here which employs over 1,000 people.

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<sup>65</sup> Offshoring refers to the phenomenon of companies transferring or outsourcing activities from the UK to bases and/or organisations overseas

<sup>66</sup> The impact of global sourcing on the UK software and IT services sector: a study by Ovum for the Department of Trade and Industry, June 2006 page 5

<sup>67</sup> *ibid.*, page 35

<sup>68</sup> *ibid.*, page 35

<sup>69</sup> *ibid.*, page 35

65. ABI data suggests that employment in public administration at the West of England level increased from approximately 25,000 in 1995 to just over 33,000 in 2004. The growth rate appears to have remained relatively constant between 1999 and 2003. Bristol's performance appears to have been similar to the sub-region's. The city's share of sub-regional employment in this sector has increased very slightly over the period.<sup>70</sup>
66. Nationally employment in public administration grew by 11.4% between 1998 and 2005.<sup>71</sup> While the trend has been towards growth, Government policy is for central government employment to move in the opposite direction and there to be a gross reduction of 84,000 posts.<sup>72</sup> At the same time, central government departments and agencies are expected to relocate 20,000 posts out of London and the South East by 2010, creating opportunities for locations such as Bristol to secure inward investment by these bodies.<sup>73</sup>
67. Jobs in public administration in the West of England are forecast to decrease very slightly – by less than 3% - between 2006-2015.<sup>74</sup> Central government relocations may offer the potential to counter this potential trend. The evidence therefore suggests that there may be little if any movement in the requirement of this sector for B1 office space.<sup>75</sup>

### **Wholesale and distribution**

68. Bristol and the West of England's geographical location and infrastructure assets are strong attributes which should prove attractive to the wholesale and distribution sector. It is a major administrative and commercial centre, with a large catchment area and customer base. It sits on the junction of principal road and rail routes to the far South West, South Wales, the Midlands and London. Other infrastructure needed to support the sector is also here. The sub-region has two airports capable of taking commercial traffic, one at Bristol International Airport and the other at Filton. The Port of Bristol, a major deepwater facility, and good road and rail links have helped Avonmouth to develop as a distribution hub.
69. ABI data indicates that employment in the wholesale and distribution sector in the West of England fell very slightly between 1995-2004 to a total of 45,700 in 2004. Growth rates over the period appear to have been fairly static. Bristol's share of this employment has remained at just

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<sup>70</sup> ONS Annual Business Inquiry

<sup>71</sup> Trends in public sector employment, Office for National Statistics Labour Market Trends, December 2005 page 484

<sup>72</sup> Releasing resources to the front line – Independent Review of Public Sector Efficiency, Sir Peter Gershon, July 2004 page 30

<sup>73</sup> Stability, security and opportunity for all: investing for Britain's long-term future – 2004 Spending Review, HM Treasury, 2004 page 2

<sup>74</sup> Cambridge Econometrics LEFM (UK Regional Economic Prospects) July 2005

<sup>75</sup> Assertion based on guidance in Employment Land Reviews: Guidance Note, ODPM, December 2004 page 93 Box D.1

under one half over this period. Its share fell very slightly between 1995-2004 as jobs in Bristol fell at proportionately a slightly faster rate than in the sub-region.<sup>76</sup>

70. Wholesaling plays a key part in enabling the delivery of goods to the market. Given the projected growth of the economy, it is not unreasonable to assume that the sector – all things remaining equal – certainly has development potential.
71. Research suggests that in one sub-sector at least, wholesaling will remain an important market function. The Institute of Grocery Distribution noted that 79% of the suppliers they surveyed felt that “the wholesale sector will still have a role to play in the supply of grocery products”<sup>77</sup> up to 2010.
72. IGD also pointed out how the nature of the sub-sector’s business had been changing. Although still the predominant form of business, cash and carry-based transactions – where the purchaser drives to the wholesaler to pick up their goods – was declining. Trade based on the wholesaler delivering to the customer was on the increase. While these developments are significant in themselves, covering £16.9billion worth of business in 2005, they relate to only one part of the wholesale business and may not be applicable to the entire sector.<sup>78</sup>
73. Government has recognised how the growing economy will “lead to increased demand for the movement of goods”<sup>79</sup>. At the same time, the sector will face pressures to reduce its impact on the environment while continuing to deliver efficiencies through best practice.
74. The Eddington Transport Study<sup>80</sup> on the future of transport highlighted the key importance of international gateways for freight, such as ports and airports. It also noted the “dominant role”<sup>81</sup> that road transport played in the domestic distribution of goods, driven by the added flexibility of delivery options it offered in comparison to other modes. Freight journeys between urban centres tended to create the greatest demand on the road network. Eddington went on to highlight how the Stern review of the economics of climate change led to the conclusion that oil-based transport was likely to remain predominant until 2050.
75. Market commentators have suggested that in the short term demand for sites close to motorway interchanges will continue. Sites near to ports and rail links may become increasingly attractive. Demand is also likely

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<sup>76</sup> ONS Annual Business Inquiry

<sup>77</sup> “Wholesale sector will still be key in ten years’ time say suppliers”, IGD, 4 March 2004

<sup>78</sup> “UK Grocery Wholesaling: pressured but still relevant”, IGD, 30 March 2006

<sup>79</sup> The Future of Transport: A network for 2030, Department for Transport, July 2004

<sup>80</sup> The Eddington Transport Study, HM Treasury and Department for Transport, December 2006

<sup>81</sup> *ibid.*, page 63

to be seen for local regional distribution centres around 100,000 sq ft in size.<sup>82</sup>

76. Property market advice has also highlighted demand in the Bristol area for distribution sites near to sources of labour, who may be less interested in the Avonmouth area because of perceived accessibility problems and lacking amenities for staff.<sup>83</sup>
77. There appear to be drivers of growth which Bristol and the West of England have – in principle – the capacity to accommodate. Cambridge Econometrics data suggests that the sector will grow very slightly – by a magnitude of just over 2,000 jobs – in the sub-region by 2015.<sup>84</sup> This sector is most likely to require B8 storage and distribution space.<sup>85</sup>
78. It is worth noting that the development of Avonmouth port and rail links are identified in the draft South West Regional Spatial Strategy as an area for Local Development Documents to consider.<sup>86</sup>

## Conclusions

79. Policy drivers in place for or consensus on the likelihood of growth have been identified for all sectors subject to analysis. For the majority of sectors, this is line with historic trends and growth projections and thus implies a need to provide space for them. For some other sectors, such as aerospace and advanced engineering, banking and insurance and public administration, historic trends and growth forecasts suggest they may contract in the future. That said, there are a number of policy drivers for growth and strengths that the city has which may generate opportunities to drive forward growth in these sectors. Implications for the spatial requirements of these key sectors are less clear cut and they probably require close monitoring to identify how their needs are developing.

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<sup>82</sup> Smaller sheds in the sun, Property Week, 5 January 2007

<sup>83</sup> Comments based on Alder King's market commentary prepared for the Employment Land Study

<sup>84</sup> Cambridge Econometrics LEFM (UK Regional Economic Prospects) July 2005

<sup>85</sup> Assertion based on guidance in Employment Land Reviews: Guidance Note, ODPM, December 2004 page 93 Box D.1

<sup>86</sup> Draft Regional Spatial Strategy for the South West of England, 2006 page 120

## A4 ALDER KING'S MARKET COMMENTARY

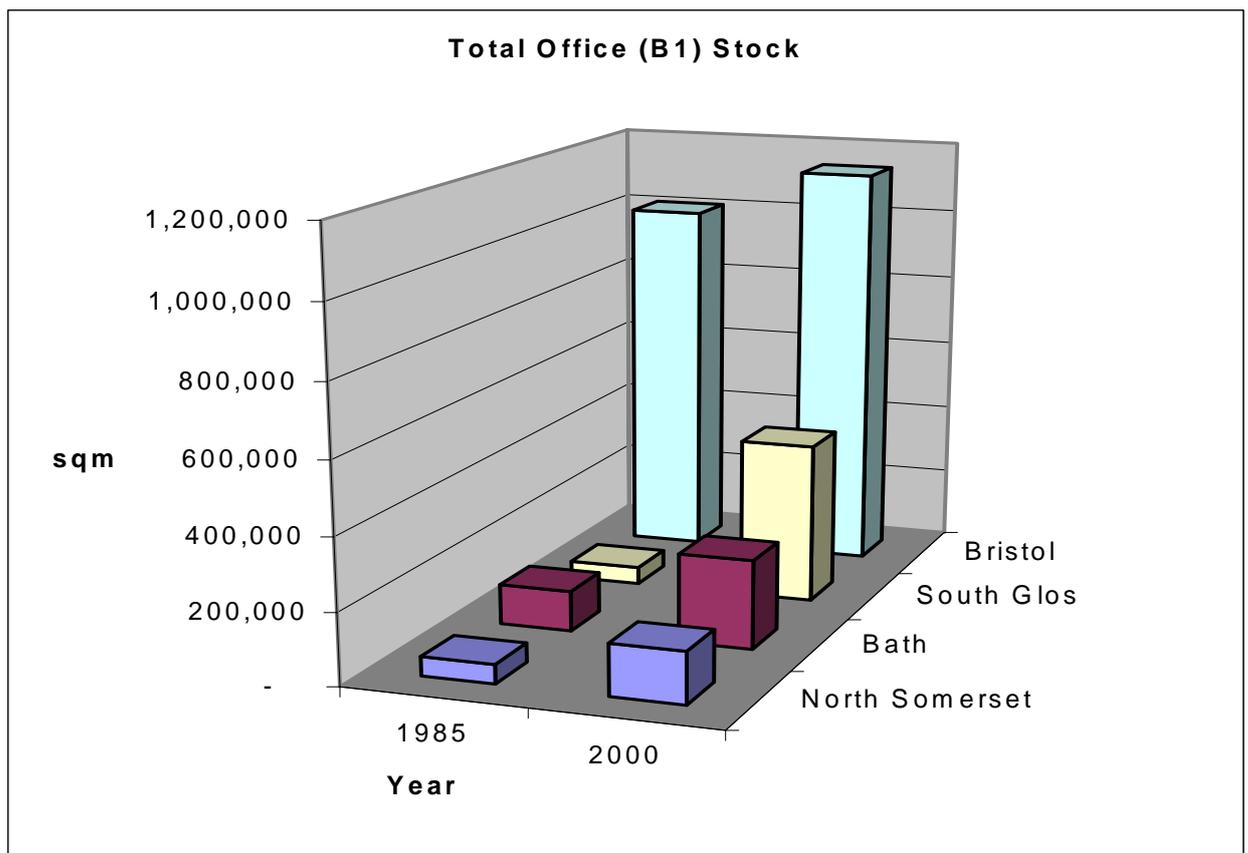
### Property Market Overview and Commentary

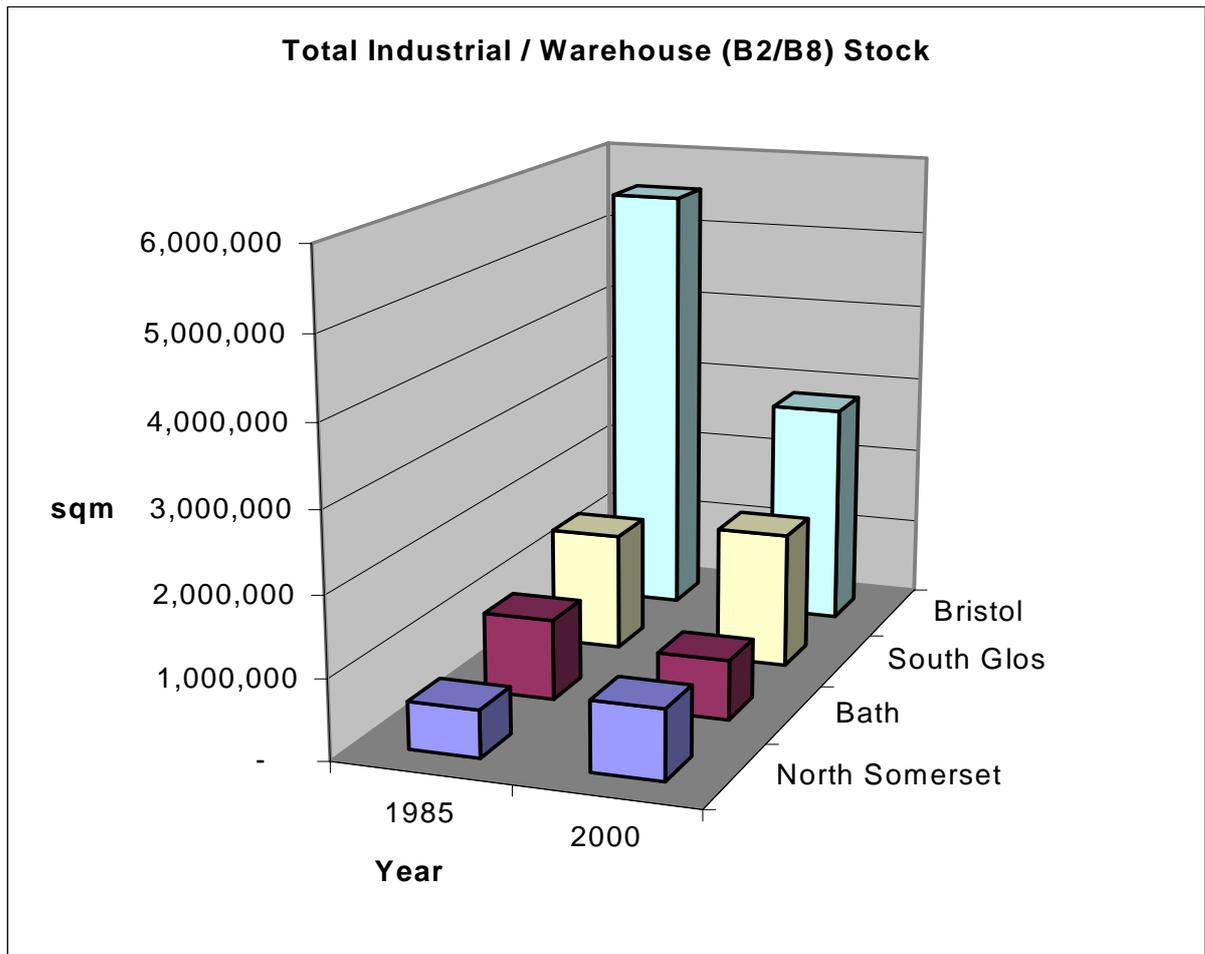
Set out below is Alder King's May 2007 market overview and commentary on Bristol's Employment market specifically covering the office and industrial/warehouse markets supplied for the draft ELS published in July 2007

#### 1. Setting the Scene/Historic Perspective of the Market

1.1 Analysis of 'commercial and industrial floor space and rateable value statistics', published by the Office of the Deputy Prime Minister, reveals that in the West of England Strategic Partnership (WESP) area (comprising the Bath and North East Somerset, Bristol City, North Somerset and South Gloucestershire unitary authority areas) between 1985 – 2000, total industrial/warehouse floor space has fallen from 8,620,800 sq m to 6,166,600 sq m, a decrease of 2.462 million sq m (28%). In the same area total stock of office floor space has increased from 1,221,700 sq m to 1,979,000 sq m, a rise of 757,300 sq m (62%).

1.2 The tables below show these changes by district between 1985 and 2000.





1.3 This general trend of an increase in overall office stock and reduction in industrial stock has continued.

1.4 As stated above, these figures are obtained from published government statistics based on rates statistics. Although their precise categorisation (and therefore actual figures) would vary from the Office and Industrial Agent Societies the outcome reflects the same pattern/trend.

## 2. Office Market History and Context

2.1 Prior to the mid 1980s there was no significant 'out of town' office market or supply in Greater Bristol. Changes in business trends coupled with the relaxation of planning regulation caused an explosion of low rise heavily car parked office schemes with good motorway access, free of congestion, in Business Park locations. Activity was focused on Bristol's northern fringe especially Aztec West and Bradley Stoke and this new 'out of town' office market eclipsed historical demand in Bristol City Centre.

2.2 Following a period of high activity and speculative office development at the end of the 1980s, during the early 1990s Bristol's office market was affected by a national economic recession. The market was characterised by inactivity, an oversupply of unlet office schemes, left over from the 1980s boom (e.g. Newfoundland Court, Century Place, Hanover House, Monarch

House), which resulted in falling values and a loss of market confidence which was to overhang the market until 1995/1996.

- 2.3 During the late 1990s demand began to improve and historic supply was taken up. By 1997 developers started again to consider speculative office development resulting in schemes including St James's Court and Venturers House. However during the 1990s the out of town market remained stronger than the City Centre fuelled by significant activity arising from such companies as Orange, Axa Sunlife and Government agencies such as the MoD (which alone accounted for over 150,000 sq m (1.6 million sq ft) of development).
- 2.4 Since 2000 the emergence of a stable economy had caused a general uplift and activity with increased demand from the private and public sectors.
- 2.5 Since 2000 the Greater Bristol area has witnessed unprecedented levels of activity in the office market resulting in record levels of take up and reduced levels of supply. The north Bristol fringe, both prime and secondary business parks (Aztec, Almondsbury Park, Parkway, Bristol Business Park etc), have now been largely 'developed out', contributing to restricted supply - combined with mounting 'out of town' congestion and pressure on labour markets in the area. As a consequence small scale speculative office development has emerged, successfully, in new 'out of town' locations, in particular in the east at Emersons Green (e.g. Monarch Court, Brook Office Park) and to the south and west at J19 M5, in particular at Portishead but also at Eden Office Park, Pill and J20 M5 Clevedon at 520 Business Park.
- 2.6 At the same time the central Bristol office market also recovered strongly in particular with the emergence of Temple Quay, Victoria Street Triangle where over 100,000 sq m (1.1 million sq ft) of new office development has been completed.

## **The Bristol Office Market – January 2007**

### **Overview**

- 2.7 Current standing stock within the Greater Bristol office market is estimated at circa 1,625,000 sq m (17.5 million sq ft) with 1.14 million sq m (12.2 million sq ft) located in Bristol City Centre/Clifton and approximately 490,000 sq m (5.3 million sq ft) in out of town locations, dominated by the maturing business parks in north Bristol's fringe.
- 2.8 Analysis of transactions concluded over the last 24 months showed that in particular the professional sector, government agencies, financial services and service sectors continue to be most active in what remains a vibrant local economy.
- 2.9 City Centre headline rents for "Grade A" accommodation ended 2007 at £26.00 per sq ft, an annual increase of 6.1%. Prime city centre rents have now grown by 10.6% (3.4% per annum) over the last 3 years.
- 2.10 Increasing demand for Grade A accommodation within Bristol City Centre particularly over the last 6 years has reduced available supply, although, until relatively recently, this has not resulted in significant major new speculative development.

- 2.11 This situation has now changed and during 2004/2005 three new Grade A specification developments commenced on site together with speculative comprehensive refurbishment of an existing building (the former Northcliffe House, Colston Ave. - circa 4200 sq m (45,000 sq ft)). The trend for speculative Grade A and comprehensive office refurbishments is continuing and likely to accelerate in the short term. The most recent example of a comprehensive refurbishment is The Prudential Building, Wine Street, featuring 5575 sq m (60,000 sq ft) which is currently letting well. There are other examples of partial refurbishments/improvements (e.g. the former Intercity House in Victoria Street and Fromesgate House in Lewins Mead). In future however, there is a likely to be a natural 'brake' on comprehensive refurbishments caused by the recent introduction and development of Part L of the building regulations which requires, amongst other things, for buildings to be much more energy efficient - it is very expensive for most refurbishments to comply, which affects viability.
- 2.12 Buildings that have most potential for comprehensive redevelopment are characterised by having a historic large floor plate, in particular good floor to ceiling heights (currently min 3m top of floor slab to underside of ceiling slab) to enable the introduction of raised floors and suspended ceilings, good parking ratios, preferably better than modern standards for new spec offices so that they compete better in this respect than new build.
- 2.13 The out of town office market is also buoyant with most demand focusing on conventional business parks in Bristol's north fringe.
- 2.14 Historically demand for Grade A specification accommodation has been polarised, either focusing upon the in or out of town markets but rarely both. Availability of Grade A specification out of town is now at a very low level. The situation is being addressed by developers undertaking speculative development in a variety of locations both in and out of town.
- 2.15 For example, in the city centre developments are taking place at: Hartwell House, Victoria Street 5,200 sq m (56,000 sq ft), Portwall Place, Portwall Lane 15,800 sq m (170,000 sq ft) of which 6,500 sq m (70,000 sq ft) is available, ND8 Temple Quay 4,833 sq m (52,000 sq ft). Out of town developments are occurring at; Hampton Court, Aztec West 2 x 2,785 sq m (2 x 30,000 sq ft), Building 620 & 630, Bristol Business Park, 1 x 1,200 sq m, 1 x 3,070 sq m (total 47,000 sq ft).

### **Office Demand/Take Up**

- 2.16 In 2006 the Greater Bristol office market witnessed 'take up' of approximately 106,000 sq m (1.12 million sq ft) compared to 107,000 sq m (1.15 million sq ft) in 2005 and 128,000 sq m (1.37 million sq ft) in 2004. The 10 year average total take up for Greater Bristol up to and including 2006 is approximately 97,700 sq m (151,000 sq ft) and has been relatively stable during this period.
- 2.17 In 2006, Bristol City Centre witnessed take up of 78,500 sq m (845,000 sq ft) which is ahead of the 10 year average of approximately 67,250 sq m (723,500 sq ft).

- 2.18 The out of town market witnessed take up of 25,500 sq m (275,000 sq ft) during the same period, a reduction from the strong take up in 2005 (of just over 36,000 sq m (390,000 sq ft)) but consistent with the 10 year average of approximately 26,800 sq m (289,000 sq ft). This reduction in out of town take is in part explained by very low levels of supply during 2006.

### **Office Supply**

- 2.19 We estimate that there is currently a total of 83,650 sq m (900,000 sq ft) available office accommodation within the Greater Bristol market (i.e. approximately 7% of the total stock), its lowest level since 2002. This figure compares with a January 2006 total of 88,300 sq m (950,000 sq ft) and a January 2005 total of 107,000 sq m (1.150 million sq ft). Of the total 83,650 sq m (900,000 sq ft) available, approximately 70,000 sq m (750,000 sq ft) is based in central Bristol. Much of this space is poor second hand accommodation of varying quality but generally with an outmoded specification and small floor plates.
- 2.20 There continues to be a shortage of Grade A specification accommodation both in the city centre and out of town. At the current time we estimate there is only 5,850 sq m (63,000 sq ft) of new Grade A accommodation immediately available in the city centre with an additional 3,050 sq m (33,000 sq ft) of Grade A second hand accommodation and only 2,800 sq m (30,000 sq ft) of Grade A accommodation available out of town. This compares with Grade A 10 yr. annual average take up rate in the city centre of 20,400 sq m (220,000sq ft) and a 5 yr. annual average take up out of town of 11,500 sq m (125,000 sq ft). Although this may have caused a delay in some companies' 'development/expansion' plans this would now in most cases only apply to smaller requirements of 1000 sq m (10,000 sq ft) or less, as increasingly larger requirements are planned reasonably well in advance and are usually pre-lets.
- 2.21 However, as at January 2007 the market is responding to this shortage in the City Centre with approximately 20,000 sq m (217,000 sq ft) of new Grade A office accommodation under construction and due for completion within the next 18 months. A further 14,850 sq m (160,000 sq ft) is scheduled to commence construction during the early part of the year and in addition there is approximately 160,000 sq m (1.77 million sq ft) of new office accommodation with either detailed or outlined planning permission. Furthermore, capacity for 100,000 sq m (1.15 million sq ft) of new development proposals for offices (which are not yet the subject of planning applications) to be brought forward through the planning and development process is already identified (e.g. Part of Bristol Arena Complex 20,000 sq m, CMG Temple Way 25000 sq m, St. Mary Le Port 30,000 sq m, Temple Quay East 5000 sq m, 111 Victoria St. & 103 Temple St 17000 sq m, London County Estates Victoria St. 9000 sq m). In all this represents a potential circa 15 year supply at average take up rates of new stock.

### **Analysis, Interpretation and Comment**

- 2.22 The Bristol office market is buoyant and has experienced a 10 year period of stability and growth. Although during the 1980s and early 1990s the central Bristol market suffered as the out of town market grew, the perceived benefits of accessibility and high car parking ratios out of town have started to wane (due to congestion and more restricted parking policies), coupled with a

perceived improving City Centre working environment, so the central market has regained strength.

- 2.23 In accordance with central government policy, Bristol City Council is advocating proposals to encourage commuters to use alternative methods of transport to the car. Current proposals include congestion charging, further provision of park and ride services, bus priority lanes and reducing the allocation of car parking spaces within any new city centre office development.
- 2.24 Whilst some of these proposals are at an early stage, it is clear that transportation issues, in particular close proximity to public transport services, will become increasingly important to City Centre office occupiers. In turn this will lead to greater occupier reliance on public transport and further enhance the benefits of the train station and the area round Temple Meads.
- 2.25 As a consequence of these factors, the City Centre has already seen a shift of the prime core to Temple Quay and Victoria Street, a trend which seems likely to continue. The main central and Clifton markets are not expected to suffer unduly from this change in 'gravity' and are expected to be able to remain sustainable and active with Clifton in particular attracting a different type and character of demand. However, in due course, there may be pressure on some of the now secondary central office areas for alternative types of development.
- 2.26 The areas around Bond Street/St James Barton, along the inner ring road through Lewins Mead, Colston Ave/Colston Street (as far as the junction with Baldwin Street) have all weakened as locations in recent years and would currently be considered secondary. It is difficult to predict the future of some of the buildings in these areas. Some developers have mooted the prospects of refurbished offices although we currently consider such proposals to be high risk with low prospects of significant success (i.e. similar to the poor letting performance of South Plaza at St James Barton where 10,150 sq m (109,000 sq ft) was completed in 2002; 75% remains "unlet".) There have also been developers considering the viability of residential conversion (similar to Redrows 51o2, St. James Barton scheme) which, again, we currently judge to be difficult in terms of viability. Many buildings in this area have short comings from a refurbishment perspective and the environment would generally be considered to be poor. Clearly there could be pressure for large scale comprehensive redevelopment in due course (which is likely to be needed to significantly change current market perceptions of the location). If the latter were to transpire we would currently envisage developer promotion of high density residential with some mixed uses (e.g. hotel & leisure) and a change in the scale and function of the road infrastructure notwithstanding that such proposals might currently be contrary to planning policy. However, in our opinion the future of the area is uncertain at present.
- 2.27 In the short term there is a strong pipeline of enquiries in the market including some of significant scale, mainly from the professional services and financial sectors.
- 2.28 Most of the demand is indigenous growth with few significant inward investment type enquiries. In fact there are very few significant genuine footloose, 'inward investment' enquiries – those that have and do emerge are not deterred by any inherent aspect of the Bristol property market (with the

possible exception of rental levels/property cost). Anecdotal evidence would suggest that the availability and cost of labour in the sub region is a factor which may influence organisations to decide not to choose Bristol.

- 2.29 There is a strong demand for Grade A office accommodation with large floor plates (i.e. 10,000 to 30,000 sq ft) driven by modern working practices and the desire for open plan accommodation on one floor. Companies are also increasingly conscious of their ecological credentials and requirements for 'green' or environmentally friendly buildings continue to grow. These two factors are likely to drive more strongly the demand for new buildings which usually perform best against such criteria.
- 2.30 On the supply side there is a significant number of schemes with planning permission and more coming through the pipeline, with the theoretical potential of a 15 year supply. The wide range of opportunities provided is healthy for attracting investment but however, with such a buoyant market, there is an emerging threat of potential over supply. Until recently (2005) consented office schemes frequently had a higher value for residential use (assuming it were possible to convert the same density). The value equation has now reversed which again could contribute to an over exuberance by developers to speculatively construct office schemes leading to oversupply.
- 2.31 Notwithstanding the benefit of a range of opportunities, it is debatable as to whether a 15 year potential supply, allowing central sites to lie dormant for a decade, represents effective use of land. If there were to be a short term oversupply of new space constructed and the value equation reversed back in favour of residential development, some office sites may come under pressure for alternative use development (i.e. residential).
- 2.32 The City Council will need to ensure that the best key office sites are available when required. We anticipate that, given the move by the City Centre market towards Temple Quay, sites around Temple Meads Station, Temple Quay, Victoria Street through Redcliffe North, Portwall Lane, Queens Square to Broad Quay will be attractive. Within those areas, sites with some prominence and presence capable of delivering efficient desirable floor plates, in terms of scale and shape/orientation are likely to be preferable.
- 2.33 Notwithstanding the foregoing comments, taking into account the very strong level of current enquiries we consider demand is likely to remain consistently high in central Bristol over the next 2/3 years, barring a major economic downturn. From examination of occupier requirements, in particular recent take up in the city centre, we anticipate the demand over the next 2 years will come from the following sources:
- Companies wishing to consolidate fragmented offices into one building.
  - Accommodation requirements resulting from mergers, particularly in the financial services and professional sectors.
  - Requirements resulting in centralised services e.g. call centre.
  - Requirements arising from the exercise of break clauses and leases falling in and buildings constructed in the late 1970s. These are likely to arise typically around the historic central core (Lewins Mead Colston Ave/St. and Victoria Street (see para 2.22))

- Occupiers looking to upgrade the quality of their existing accommodation – further expansion within the professional sector (especially solicitors).

### **3. Industrial/Warehouse market; history and context**

- 3.1 In common with the office market the industrial market was characterised by a downturn during the early 1990s as the national economy entered recession.
- 3.2 During the mid 1990s many national companies began to use a more scientific approach to their logistics and distribution operations. The concept of large distribution hubs was introduced, consolidating demand in this sector. As a consequence demand decreased for small distribution centres of up to 1400 sq m (15,000 sq ft) in the South West region, especially within the WESP area.
- 3.3 Demand for very small units (i.e. less than 1500 sq m) was consistent with and 'mirrored' the trend of general economic activity.
- 3.4 Take up peaked at 2000 at 320,625 sq m (3,450,000 million sq ft) fuelled by 4 large transactions on standing properties - (No.1 Bristol Distribution Park, let to Vital Distribution, 5,650 sq m (60,900 sq ft), No 6 Bristol Distribution Park let to Baldor Motors & Controls 6,850 sq m (73,700 sq ft), Deep Pit Road, Fishponds let to John Lawrence 19,980 sq m (215,000 sq ft), First Avenue Portbury let to Wincanton Distribution, 6,875 sq m (73,975 sq ft).
- 3.5 Industrial land supply has been under constant pressure since the end of the 1990s throughout the Greater Bristol area, with the exception of Avonmouth/Severnside. Former industrial complexes in built up mixed residential areas have frequently been seen as appropriate brownfield redevelopment sites for new residential. Residential values significantly exceed industrial/warehouse land values by 3-4 times. Typically employment land values are in the range of £741,000 - £1,235,000 per hectare (£300,000 - £500,000 per acre), whereas residential redevelopment values are typically between £2,500,000 and £5,000,000 per hectare (£1,000,000 - £2,000,000 per acre) dependent on location, density and social housing content. Furthermore strategic employment land in Bristol's north fringe and eastern fringe, which might have originally been imagined to be developed for a mix of employment including a large proportion of industrial/warehouse, has almost exclusively been developed for either out of town offices or residential development.

#### **The Bristol Industrial/Warehouse Market January 2007**

##### **Overview**

- 3.6 By contrast to other regional centres in the UK, Bristol has established and maintained a base in the provision of high value engineering and manufacturing. This has in the main been aerospace and defence related industries with Airbus and Rolls Royce maintaining a strong presence.
- 3.7 Bristol has also benefited from a well balanced industrial market with a mix of manufacturing and distribution across the various industrial locations in the city. The Bristol industrial market is not significantly biased towards either

manufacturing or purely distribution uses although it is probably accurate to say that the majority of new space taken up in the last 3 years has been for warehousing.

- 3.8 One of the key features of the last 24 months is the significant change in the strategic employment land holdings at Severnside. Drawbridge acquired the balance of ICI's land holding which has the potential to provide approximately 142 ha (350 acres) of usable industrial land. Gazeley Plc acquired from Redrow the 19 ha (47 acre) Weston Approach scheme with Rosemount acquiring an additional 26.5 ha (65 acres) from Burford. In addition St Modwen are progressing with the redevelopment of the 86 ha (212 acre) former Britannia Zinc Site.
- 3.9 The acquisition of these strategic land holdings by developers, who have traditionally focused on large format distribution buildings, is significant. Bristol provides the gateway to the South West and remains one of the few locations in the UK that has not yet been affected by the latest wave of reorganisation of supply chain networks. Many businesses are requiring even larger scale national distribution networks, seeking to further reduce their supply chain costs, consolidating into a smaller number of large format buildings in strategic locations across the UK.
- 3.10 Bristol is yet to see a significant number of buildings in excess of 20,000 sq m (215,000 sq ft) and it is therefore expected that in the short to medium term the supply chain consolidation will result in a number of larger format buildings to service demand. However buildings are expected to be in a range of 13,935-27,870 sq m (150-300,000 sq ft) and will be required to have excellent communications with the motorway network. Avonmouth/Severnside is the only area within Greater Bristol currently capable of accommodating this type of demand and is well suited to doing so (although attracting staff to this location continues to cause employers problems). However there are some distributors who have a higher staff requirement, because of packaging or 'stock picking' type operations, who would decline Avonmouth/Sevenside in favour of other locations (e.g. Swindon, Gloucester, Bridgewater) but would like to have the opportunity to consider alternatives in Greater Bristol such as NE Bristol (Emersons Green and Yate) and subject to immediate access to the Avon Ring Road, SE Bristol (e.g. Hicks Gate area) and improved access to the A4 Portway via the proposed A370/A38 Link, SW Bristol (e.g. Ashton area).
- 3.11 Our comments above do not address the special case of port related activities at Avonmouth and Portbury. There have been a number of areas of the economy coupled with discussion about distribution practice, that could cause additional port related demand. Both dock areas of Portbury and Avonmouth are currently constrained in terms of immediate available land in their immediate proximity, which historically has been their requirement. Logically this will cause pressure for additional land in these locations. In terms of quantum, Avonmouth/Sevenside theoretically has a large amount of land capable of development, but to maximise land use efficiency the distribution of port related uses may need to change – at the same situation holds true for Portbury. It is not within the scope of this commentary to deal with the detail of this subject and more work is required to expand on these general observations. What is clear and evidenced from historic take up at Portbury dock, port related activities have the potential to create significant land use demand in the future.

- 3.12 Avonmouth/Sevenside is the exception to the general picture in terms of land availability. Generally the market continues to face a challenge in the provision of land and buildings particularly in locations which includes the whole of the City of Bristol (with the exception of Sevenside) where shortage is acute.
- 3.13 We have been asked to comment on market perceptions of flood risk in Avonmouth/Sevenside. At present, despite large areas of Avonmouth and Sevenside being within the River Severn flood plain and widely publicised general threats of global warming, rising sea levels and increasing flood risk in such areas, market sentiment is currently not reflecting these concerns. Clearly, should there be a significant flood in this area in the future this would have a dramatic detrimental impact on Bristol's industrial land provision and there would also be an adverse market reaction to land and buildings in the affected area which is dominated by factories and warehouses.

### **Industrial/Warehouse Demand/Take up**

- 3.14 Historic annual take up levels have been in the range of 255,000-275,000 sq m (2,750,000 – 3,000,000 sq ft) fairly consistently between 1995 and 2005. Demand has been relatively consistent across all size ranges; with no significant change being experienced in numbers of deals done at either a small or large size throughout the last 5 years. Unless there is a significant change in economic circumstances, we believe there is no reason why the current level of enquiries and take up should not continue unless shortage of available land becomes so acute that occupiers are squeezed out. Conversely if there was an unrestricted immediately available (i.e. fully serviced) industrial land supply in all areas we conservatively estimate that there is latent demand for up to a further 10/20% of current annual take up levels. However, it should be noted that 'latent' demand by its very nature is difficult to assess.
- 3.15 Notwithstanding the foregoing, 2006 saw an annual take up of only 190,000 sq m (2,000,000 sq ft) a reduction of 90,000 sq m (970,000 sq ft) on the 2005 figure. This reduction in take up is primarily due to a restrictive level of supply of good quality standing stock, exacerbated by a lack of prime, speculatively developed space, combined with the loss of existing stock to high value alternative uses. The 2006 level of take up is the lowest since 1994.

### **Industrial/Warehouse Supply**

- 3.16 Historically overall supply levels in the Greater Bristol area have averaged around 275,000 – 300,000 sq m (2,950,000 – 3,250,000 sq ft) in a mixed range of building sizes with a reasonable location spread. Since the late 1990s supply has become polarized into larger buildings being available primarily in the Avonmouth/Sevenside areas with very few buildings of any scale and quality available within the historic industrial areas of the city. There has been a steady reduction in overall supply since 2003 to a 10 year low of 215,000 sq m (2,300,000 sq ft) in 2005, amounting to a halving of supply in just a 2 year period. With the exception of Sevenside, there has been a very limited amount of speculative industrial development over the preceding 5 year period. There are currently no new speculatively built units available in a size range greater than 372 sq m (4,000 sq ft).

- 3.17 With land supply constrained, this situation is unlikely to change, with the exception of Severnside, where new developer proposals have emerged to construct major new regional warehouse developments totalling around 50,000 sq m (540,000 sq ft) over the next 12 months.
- 3.18 Whilst these developments will provide new supply of this type there are no signs a reverse of the trend is likely to occur within the City boundary. We are only able to identify a 1.09 hectare (2.7 acre) site at Temple Gate Park, Temple Meads as being deliverable undeveloped industrial land in central Bristol. The site can accommodate a maximum of 3,800 sq m (40,800 sq ft) of accommodation and will be limited by a restriction on operating hours because of the proximity of residential. Other land that might be available for industrial development is not being released by land owners who are often seeking higher value employment uses, perhaps hoping to achieve mixed use development (which is inherently unlikely to be attractive to most industrial/warehouse occupiers).

### **Analysis, Interpretation and Comments**

- 3.19 With the exception of Severnside there remains an extremely limited supply of good quality industrial buildings & land in any of the built up areas of the City.
- 3.20 The availability of industrial land for either developers or owner occupiers to construct buildings to meet modern standards is virtually non existent in all areas other than Severnside.
- 3.21 Demand from occupiers particularly for freehold buildings or land remains buoyant in all size ranges. The majority of occupier enquiries have to accept compromises or remain in substandard premises unable to expand or move into more modern or better specification, more efficient buildings. The implications of this are difficult to be precise about without further economic analysis. However, it seems likely that these circumstances are a brake on the local economy, preventing productivity gains, job creation and wealth creation (e.g. Hedlam Plc have been seeking a 4 acre site on which to construct a new factory/warehouse in the South or East of Bristol for 3 years on which to expand their operation without success. — they continue to occupy substandard premises and there are many other similar examples of this occurring).
- 3.22 Although there is been much comment about the need to protect existing industrial/warehouse premises from redevelopment for alternative uses (particularly residential) in built up areas, frequently industrial/warehouse uses conflict with surrounding residential premises and therefore careful and selective protection of industrial land is required.
- 3.23 There is no purpose in protecting all employment land (even where it is of reasonable scale) if it is in a built up residential area where conflict will inevitably arise with modern industrial redevelopment proposals for high buildings, 24 hour working and large number of vehicle movements - as clearly occupiers and developers will be deterred. However, significant established industrial areas need to be protected both to conserve existing stock and to allow industrial development without conflict. Also required are significant new allocations on the periphery of the City with access to the ring road, in particular the south west, south, south east, north east and north

Bristol which need to be achieved if a balance of employment type is to be maintained.

3.24 We have attached in an appendix a generic summary of the spatial/specification characteristics of demand for reference. We have been asked to comment on whether industrial enquirers have been expressing interest in specific sites in particular areas of the city. Because of the paucity of supply, there is a very limited number of sites to which interest could be drawn, so evidence of this type is scarce. However, occupiers have expressed specific interest in land at Imperial Park Hartcliffe and Hengrove Park – in both cases it is understood the landowners are seeking to attract higher value employment uses, as opposed to conventional industrial occupiers. Interpreting demand/enquiries we judge that there is demand for industrial land meeting the following characteristics:

- Fully serviced
- Freehold availability
- Good road accessibility (i.e. the Avon Ring Road for example – particularly non conflict with roads serving significant residential areas – much of east and south Bristol suffers in this respect)
- Either established industrial area or zoned industrial land (i.e. limitation of future conflict with other uses)
- Ability to have secure yards and some limited open storage.

3.25 'Strategic Land' (i.e. preferably land in excess of 20 ha (50 acres) meeting these characteristics in NE Bristol (Emersons Green and Yate), SE Bristol (e.g. Hicks Gate area), SW Bristol (e.g. Ashton area), coupled with smaller allocations of 2 – 10 ha (5 – 25 acres) in locations in south Bristol (i.e. Hengrove park vicinity), Yate & Thornbury – would all be desirable to meet current demand (NB demand is not freely transferable between all of these locations but identifiable demand exists for each).

3.26 The planning system somehow needs to make a differentiation between office employment uses and traditional industrial/warehouse uses. The former will significantly outstrip the latter in terms of value and even if employment land is protected from other competing uses (i.e. residential), unless significant sites are designated specifically for traditional industrial/warehouse uses then many land owners will try to conserve their land for higher value office development.

3.27 The lack of industrial land supply within the built up area of Bristol is acute and seems unlikely to change in the short term. If it were to be concluded that the existing stock of industrial/warehouse land should be maintained (as opposed to employment land including offices) then a planning regime, regulation or protocol needs to be established and enforced consistently over an extended period of time, to achieve this objective.

3.28 In terms of future provision of land suitable for industrial/warehouse demand, it would be desirable to go beyond simply matching annual take up rates with annual land supply, not only to release latent demand, but also to provide a sufficient range of choice to enable the potential of demand to be fully realised.

3.29 Experience of industrial take up during the last 3 years leads us to the conclusion that the short to medium term requirements will be represented by the following groups:

- Companies wishing to reduce supply costs by consolidating into larger regional distribution centres.
- Companies wishing to upgrade from existing poor quality stock.
- Companies undergoing significant expansion to service other growth industries within the Bristol area.
- Companies required to move due to lease expiry or exercise of break clauses.
- Small emerging companies seeking either nursery units or managed workspace.
- Trade counter uses – due to the lack of industrial development land available in Greater Bristol, there has been an inability to accommodate specialist trade counter requirements which often require large external yard space. There is therefore latent demand from occupiers such as builders' merchants, electrical wholesalers, trader suppliers etc for prominent industrial locations.
- Motor trade uses – particularly significant in Central Bristol area where they have been displaced by higher value uses requiring employment land on prominent locations in principal arterial routes free from competing high value alternative land uses. The motor trade is notoriously fickle in its requirements and likely to change, however, occupiers generally like to cluster together and there is unsatisfied demand in North Bristol and central Bristol (the latter being particularly difficult to satisfy due to competing alternative uses which offer greater employment potential).

## **APPENDIX TO ALDER KING'S MARKET COMMENTARY**

### **Generic summary of the spatial/specification characteristics for industrial and warehouse buildings**

Typical spatial/specification requirements/character can be summarised as follows:

#### **1. Buildings in the 185.8 – 464.5 sq m (2,000 to 5,000 sq ft) size range.**

- Terrace configuration
- 40% site cover
- B1, B2 and B8 use
- 6 metres to eaves
- 25 – 30kn/m<sup>2</sup> floor loading
- 10% office content
- Single insulated up and over-loading door
- Combination of brick and insulated clad elevations
- Steel portal frame construction
- Concrete loading aprons

- Toilets configured to separately serve office/warehouse areas
2. **Units from 929 – 1,858 sq m (10,000 – 20,000 sq ft)**
    - Same specification as 1 with the following amendments:
      - Minimum forecourt depth should be 25 metres
      - Floor loading capacity increasing to 30 – 35kn/m<sup>2</sup>
    - The inclusion of two loading doors per unit
  3. **Buildings of between 1,858 – 4,645 sq m (20,000 – 50,000 sq ft)**
    - Same specification as 1 and 2 with the following amendments:
      - Minimum 8 metres (up to 3251.5 sq m/35,000 sq ft) 10m to eaves
      - One door every 929 sq m (10,000 sq ft) of built space (deck level points on larger units)
      - Creation of secure yards (30m depth)
      - Separation of car parking and loading activities
      - Floor loading capacity 35 – 37.5kn/m<sup>2</sup>
  4. **Buildings in excess of 50,000 sq ft**
    - Same specification as 1 with the exception of:
      - Site cover 35%
      - Floor loading increased to 50kn/m<sup>2</sup>
      - Eaves height increased to between 10 and 15 metres
      - One loading door per 929 sq m/10,000 sq ft split between surface and dock level loading
      - Inclusion of secure yards/commercial vehicle parking
      - Inclusion of area for services compound
  5. **Plot Based Demand**
    - In addition plot based schemes are in strong demand in the following sizes: 0.2 ha/0.5 acres, 0.4 ha/1 acre, 0.8 ha/2 acres and 2 ha/5 acres+.