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A1 Corridor Logistics Assessment: Bassetlaw Council

Final Report

Iceni Projects Limited

August 2021

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ICENI PROJECTS LIMITED

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1. INTRODUCTION

1.1 Bassetlaw District Council has commissioned Icen Projects Ltd to produce an assessment of the logistics market on the A1 corridor in Bassetlaw and the wider property market area.

1.2 The aims of the study are to:

- Meet the PPG requirements for logistics needs assessments for Local Plans;
- Define the Property Market Area (PMA) to consider A1 corridor role within that wider PMA;
- Undertake a policy & literature review on the commercial and logistics market;
- Undertake a market review focused on demand for units above 100,000 sqft for Bassetlaw and the PMA and including a summary review of the performance of the key logistics parks in the PMA.
- Consider known supply for logistics in the PMA via a literature review and limited desktop review – coming to a view on years of supply and overall market capacity.
- Engage active agents and occupiers in the PMA to provide feedback.
- Provide conclusions on the role of the A1 corridor in the PMA and the outlook for logistics needs in Bassetlaw for planning purposes, recognising the need to work collaboratively with partner authorities on logistics planning.

1.3 It is not the intention of this study to undertake a full logistics needs assessment for all of the authorities covered in the PMA as defined herein, which is much of Nottinghamshire and South Yorkshire. It is recognised that in depth studies such as those for the Leicestershire authorities ('Golden Triangle') on strategic distribution utilise a range and triangulation of detailed modelling techniques¹ notably completions trends; labour demand; and forecasts in increases in goods shipments alongside replacement stock. They also have detailed authority partner engagement. The purpose of this current commission is to focus on the overall market positioning and outlook for logistics in the A1 corridor within the wider PMA context to inform the Bassetlaw Local Plan.

¹ https://www.nwleics.gov.uk/pages/strategic_distribution_study

2. LOGISTICS PROPERTY MARKET AREA

- 2.1 A number of existing documents establish the Functional Economic Market Areas (FEMAs) that are relevant to this study. These are summarised below. However whilst FEMAs are essential for planning policy development and a requirement under the Planning Practice Guidance, they do not necessarily reflect Property Market Areas (PMAs). When considering PMAs for logistics, particularly strategic sites, these tend to be larger areas than PPG defined FEMAs.

FEMA

- 2.2 First we consider the relevant FEMA commentary for the Bassetlaw A1 corridor.

Bassetlaw EDNA 2019 / HEDNA 2020

- 2.3 *The Travel to Work Area definitions from ONS show that Bassetlaw falls within the Worksop and Retford TTWA which is broadly coterminous with the district boundary. However, the self containment of the TTWA is particularly low – at 66.8% (residents) and 69.6% (workplace) self containment.* It is of note that the ONS considers that for areas with a working population in excess of 25,000, self containment rates as low as 66.7% are accepted as part of a limited “trade-off” between workforce size and level of self-containment. Therefore Bassetlaw is on the threshold for self containment.

- 2.4 The EDNA 2019 notes that overall Bassetlaw shows that there are strongest links with South Yorkshire – *this would suggest potentially including the district within a wider FEMA covering the Sheffield City Region LEP area.* Similarly, there are strong links with the other northern Nottinghamshire authorities and the north east Derbyshire authorities. However, these authorities experience stronger linkages with the larger centres of Nottingham and Chesterfield respectively. However, the evidence does not particularly support including Bassetlaw within a wider FEMA focussed around these centres. The data instead suggests an area with multiple diffuse influences and linkages acting with differing strengths on different parts of the district.

Sheffield City Region Strategic Employment Land Appraisal (SELA) Report May 2020.

- 2.5 The SELA aims to provide a coherent understanding of current strategic-level employment land across all nine districts in the SCR as of 2019, specifically Barnsley, Bassetlaw, Bolsover, Chesterfield, Derbyshire Dales, Doncaster, North East Derbyshire, Rotherham and Sheffield. The study notes that subsequent to its commissioning, the SCR LEP Geography has been modified, with SCR LEP now covering just the four South Yorkshire districts, with the other five districts (Bassetlaw, Bolsover, Chesterfield, Derbyshire Dales and North East Derbyshire) falling solely within the D2N2 LEP area. The study also notes that the ONS’s own TTWA analysis effectively indicates that

Barnsley, Doncaster and Bassetlaw are broadly self-contained districts from a commuting perspective.

PMA

2.6 The logistics market for the purposes of this study is defined as focusing on large scale units and operations rather than final mile distribution. It is generally recognised that large scale logistics units are 100,000 sqft (9,000 sqm) and above (ranging to 1,000,000 sqft or more). The focus is on units and sites capable of hosting this scale of development.

2.7 Occupiers considering units of these sizes can cover wider areas of search that go beyond typical travel to work area or general functional economic market area (FEMA) boundaries. The PPG notes

- The logistics industry plays a critical role in enabling an efficient, sustainable and effective supply of goods, consumers and businesses, as well as contributing to local employment opportunities, and has distinct **locational requirements that need to be considered in formulating planning policies (separately from those relating to general industrial land)**. (Iceni emphasis)

2.8 In this light we go beyond the FEMA definitions set out in the planning policy evidence above. Rather we have sought to engage with commercial agents who regularly deal with enquiries from occupiers looking for space of this nature. We have spoken with:

- CBRE
- Savills
- M1 Agency
- FHP
- Progen Land

2.9 Whilst every occupier has different requirements in terms of the customer / supplier locations, network access and workforce needs, there is a general consistency from agents that the A1 corridor (and sister M1 corridor) centred around Bassetlaw stretches from Doncaster to Nottingham. The key factors reported in defining the area are:

- The A1 is now viewed by many as a viable logistics corridor due to saturation on the M1
- South of Nottingham (Castle Donington) enters a separate Golden Triangle market, which is also very saturated and seeing requirements move north towards Sheffield / Doncaster

- At the north, Barnsley is more related to the Wakefield / Leeds M62 corridor

2.10 More detailed agent comments are set out in chapter 6.

2.11 Given the commentary, the area set out in the figure below is therefore indicative of the full PMA assessment considered in this study.

2.12 It is recognised that this study needs to seek to differentiate the role of the Bassetlaw A1 element running south of Doncaster down towards Newark. This is considered in the report by recognising the inner study area (A1) role in the wider PMA that is defined by large scale occupier areas of search which are rarely as small as the inner study area.

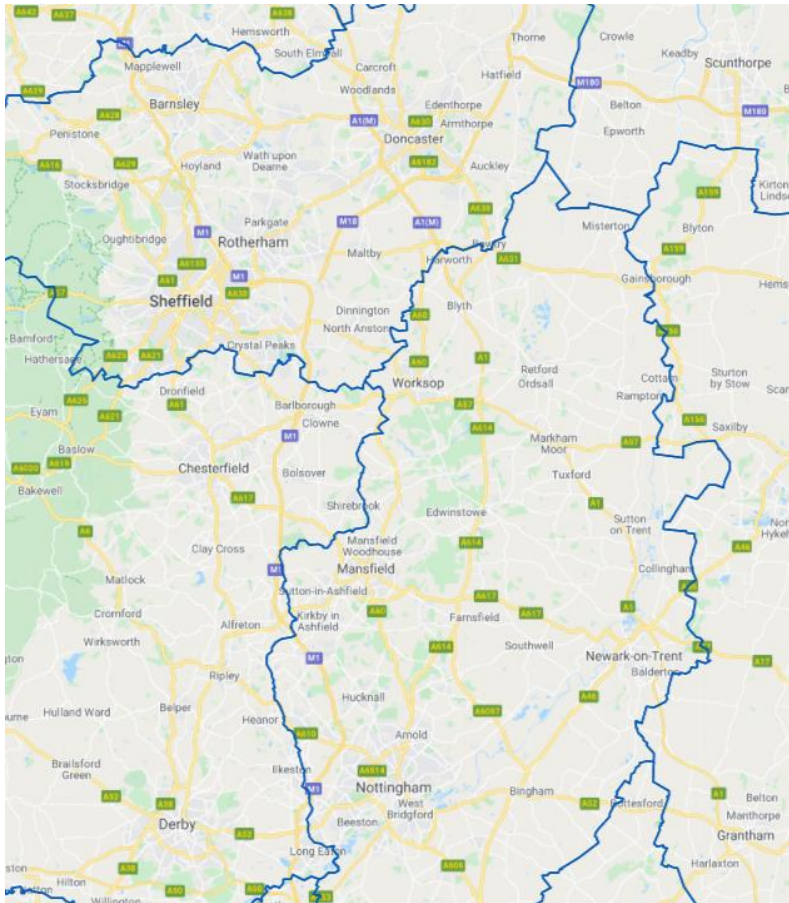
Table 2.1 Indicative A1 Corridor Full Property Market Area / Inner Area



Source: CoStar / Icen Projects

2.13 It is useful to compare this area to the CoStar default property market areas. CoStar is a recognised national property market database that Icen subscribes to. The CoStar industrial market defaults to the Nottinghamshire / Derbyshire counties and combines Sheffield, Doncaster, Rotherham.

Table 2.2 CoStar Property Market Areas



Source: CoStar / Icenii Projects

2.14 The full PMA area as defined in the previous graphic covers:

- Much of the Sheffield City Region (SCR) Local Economic Partnership (LEP), its relevant constituent members being Sheffield City Council; Doncaster Metropolitan Borough Council; Rotherham Metropolitan Borough Council; but excluding Barnsley Metropolitan Borough Council.
- The majority of the Nottingham Core and Outer Market Areas² including Ashfield District Council, Broxtowe Borough Council, Gedling Borough Council, Erewash Borough Council, Nottingham City Council, Mansfield Borough Council, Newark & Sherwood District Council and Rushcliffe Borough Council

² As defined in the Nottingham Core HMA and Nottingham Outer HMA Employment Land Needs Study Report May 2021

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- Part of the North Nottinghamshire and Derbyshire authorities of the D2N2 LEP being Bassetlaw District Council; North East Derbyshire District Council; Derbyshire Dales District Council; Bolsover District Council and Chesterfield Borough Council

2.15 It is of note that there are two principle existing employment land studies (not logistics studies) that cover the Sheffield City Region and Nottingham HMA areas. These are the:

- Nottingham Core HMA and Nottingham Outer HMA Employment Land Needs Study (ELNS) Report May 2021; and
- Sheffield City Region Strategic Employment Land Appraisal (SELA) Report May 2020.

2.16 Both review the employment land supply with the constituent areas and provide a base that cover the PMA as defined (and areas beyond it).

3. POLICY AND LITERATURE REVIEW

3.1 This section is concerned with two types of document relevant to logistics: selected planning policy / evidence; and property market literature.

Planning Policy

Planning Practice Guidance

3.2 The PPG 'Housing and economic needs assessment' paragraph: 031, reference ID: 2a-031-201907221 guides local authorities in assessing the need and allocation of space for logistics. It's noted in paragraph 031 that:

3.3 Logistics industry needs to have a "*distinct locational requirements that need to be considered in formulating planning policies (separately from those relating to general industrial land).*"

3.4 Where facilities e.g., "significant amounts of land, good strategic transport networks" etc... are needed, it is important that "strategic policy-making authorities should collaborate with other authorities, infrastructure providers", and other key stakeholders that are affected by the development, in order to "identify the scale of need across the relevant market areas."

3.5 This can be informed by:

- engagement with logistics developers and occupiers to understand the changing nature of requirements in terms of the type, size and location of facilities, including the impact of new and emerging technologies;
- analysis of market signals, including trends in take up and the availability of logistics land and floorspace across the relevant market geographies;
- analysis of economic forecasts to identify potential changes in demand and anticipated growth in sectors likely to occupy logistics facilities, or which require support from the sector; and;
- engagement with Local Enterprise Partnerships and review of their plans and strategies, including economic priorities within Local Industrial Strategies.

National Policy Statement on National Networks

3.6 The 'National Policy Statements for National Networks'³ by the Department for Transport (2014) document sets out the Government's policies to deliver the development of nationally significant infrastructure projects (NSIPs) on the national road and rail networks in England.

3.7 Key paragraphs in relation to 'logistics' from the document are:

- Paragraph 2.34: Rail freight has a strategic importance “as it is already playing an increasingly significant role in logistics and, is an increasingly important driver of economic growth”
- Paragraph 2.42: The logistics industry directly employs over two million people “across more than 190,000 companies generating over £90 billion annually, underpins the efficient operation of most sectors of the wider national economy.”
- Paragraph 2.45: “The logistics industry provides warehousing and distribution networks for UK manufacturers, importers and retailers”, which is mainly a road-based industry. Logistics industry will need to develop new facilities alongside e.g., major rail routes, close to major trunk roads and close to areas that consume the goods.

Bassetlaw EDNA 2019 / HEDNA 2020

3.8 The 2019 EDNA notes that “the district falls outside the main M1 corridor which historically has limited the attractiveness for the larger distribution uses.” “There is not considered to be demand for super sheds in the area [Worksop] but there is demand for sub-hub (100,000 - 200,000 sq ft). Worksop as a central location between the M1 and the A1 is a particularly attractive location for that type of property.” The study notes a labour demand led need of 63 ha but notes that completions trends (excluding outliers) point to a requirement of up to 136.8 ha... Given the strength of commitments in the district and potential of the distribution market, a positive approach to development may enable a higher level growth [than 63 ha].

3.9 The 2020 HEDNA revisits the economic needs of the district, updating the labour demand forecasts which have risen to 84 ha. The report more explicitly recommends the completions trend for industrial / distribution uses totalling 186.9 ha *inc outliers*. The district’s needs are met by its supply however Apleyhead Junction would be an additional site.

Sheffield City Region Strategic Employment Land Appraisal (SELA) Report May 2020.

3.10 The SELA aims to provide a coherent understanding of current strategic-level employment land across all nine districts in the SCR, specifically Barnsley, Bassetlaw, Bolsover, Chesterfield, Derbyshire Dales, Doncaster, North East Derbyshire, Rotherham and Sheffield.

3.11 As above, during 2019 the SCR area was adjusted to exclude Bassetlaw, Bolsover, Chesterfield, Derbyshire Dales and North East Derbyshire to avoid overlapping LEP authorities. However the SELA does cover the wider definition.

3.12 It notes that a sieving exercise was then undertaken to identify all sites which had a site area of 5.0 ha or above, on the basis that these larger sites were more likely to be of strategic importance.

3.13 It notes that overall the evidence base and emerging and recently adopted Local Plans indicate an employment land need in the region of 1,469 hectares and a supply of 1,524 hectares, giving an overall surplus of c.56 hectares.

3.14 The document provides a high-level appraisal of strategic employment sites with a focus on Dearne Valley and J36; Doncaster Sheffield Airport; Markham Vale; A61 Corridor; Sheffield City Centre; Advanced Manufacturing Innovation District; and DN7/Unity. It notes that Dearne Valley, Doncaster Sheffield Airport and Markham Vale are currently focused on logistics activity although the vision for the latter is on advanced manufacturing;

Doncaster Employment Land Review 2018:

3.15 The Doncaster Employment Land Review published by Colliers International in February 2018 provides a “site-by-site review of the potential future employment sites being considered for allocation through the Local Plan process” (p.5). The potential sites that are being considered are predominantly concentrated on the M18 corridor with little on the A1M.

3.16 The market signals shows that there’s a “continued demand for industrial (B2 and B8) uses” (p.13). The take up of employment land during the period 2000-2017 for B8 (Strategic Warehouse) has a total of 269.82ha (p.14).

3.17 For new development activity, there has been a “number of speculative B2/B8 developments proposed to be started on site” (Colliers, 2018, p.19) and this includes:

- iPort – Verdion are to commence construction in March of two units of 11,984 sqm unit and 5,480 sqm respectively.
- Nimbus Park, Phase 2 – developer, Sladen Estates, is understood to be considering a start on site with two units totalling 24,154 sqm.
- Doncaster Distribution Park – Gazeley are reportedly considering a 25,083 sqm speculative build

Nottingham Core HMA and Nottingham Outer HMA Employment Land Needs Study Report May 2021

3.18 This study covers the Nottingham Core Housing Market Area [HMA] and Nottingham Outer HMA, to assess the future economic development needs of the 8 authorities up to 2038. Six different scenarios of future employment space requirements were considered based on a range of lower and higher growth conditions that could arise in the future, plus a sensitivity test based on past trends jobs growth. Broxtowe, Erewash and Nottingham have the clearest undersupply of industrial whilst outer authorities have greater balance or over supply.

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- 3.19 Regarding logistics, the study notes that, *stakeholders commented that economic growth across Greater Nottingham has been limited by lack of available large-scale strategic distribution sites over the past decade and that studies forecasting need based purely on past trends will significantly underestimate the scale of demand. Agents were confident that there is capacity in the market for a further one, or even two, very large regional distribution centres near to these key M1 junctions and that at current levels of demand, two such schemes, if made available, would be at capacity within a decade.*

Property Market and Logistics

UK Logistics Market 2021 Outlook, Knight Frank (Jan 2021)

- 3.20 Growth of the e-commerce market was a major driver of demand for warehousing space in 2020 and this is expected to continue through 2021, as retailers and distribution firms seek to expand their online and home delivery capacity and capture a share of the growing online retail market.
- 3.21 Take-up of warehousing space exceeded 50m sq ft in 2020 (compared to 34m sq ft in 2019); driven mainly by retailers and distribution companies, who together accounted for 87% of take up (units 100,000 sq ft +).
- 3.22 The robust forecast for online retail and competition, particularly for well-located assets, is likely to drive positive momentum for the logistics market. “While 2020 was the year for rapid upscaling, in 2021, demand will be driven more by long term strategic planning as retailers pivot their business models towards higher demand for online retail”.
- 3.23 Supply is currently tight. Across the UK, there is around 46m sq ft of warehousing space available (in units over 50,000 sq ft). With take-up of 52 million sq ft in 2020, that represents roughly 10.5 months of supply. However, most of that space is in second-hand units that may not be the right specification or in the right location.
- 3.24 As the economy recovers and grows over the next four years, rental growth is forecast to accelerate. The strongest rental growth is expected in London, followed by the South East and Eastern regions.

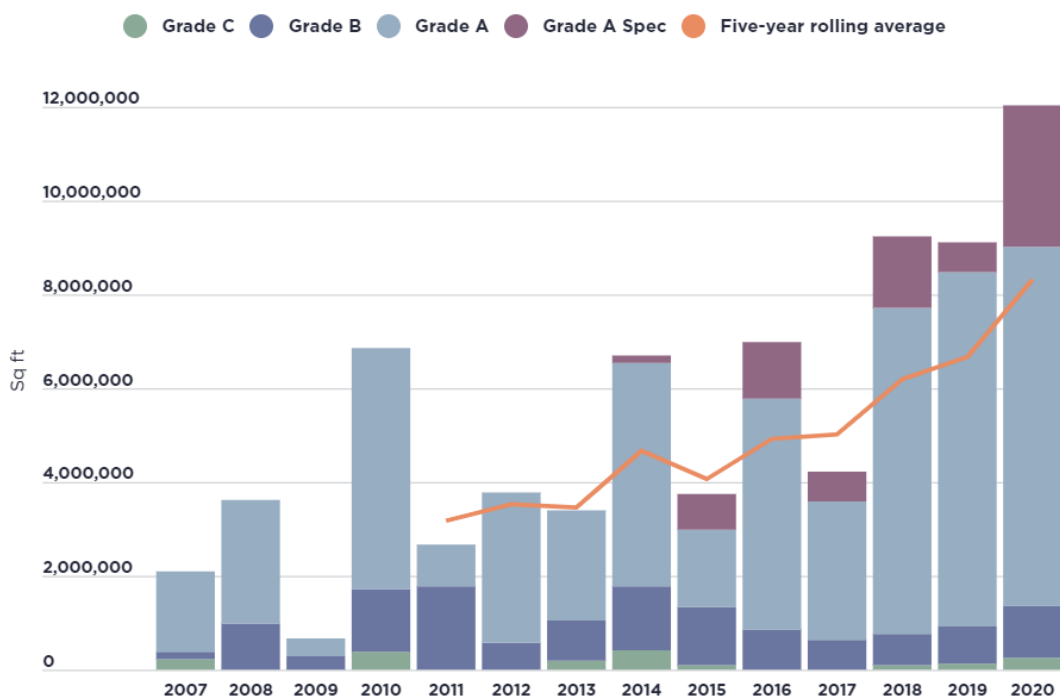
The logistics market in the East Midlands, January 2021, Savills

- 3.25 Savills report that 2020 has been a record year of take-up reaching 12.03m sq ft, 30% above the previous high watermark. The region continues to cement its position as the key strategic logistics location in the country.
- 3.26 The record levels of take-up have caused the supply of units over 100,000 sq ft to decrease. Currently, there are 26 units available totalling 5.8m sq ft representing an 8% decrease from this time last year. The strong level of activity continues to keep the regional vacancy low at 5.2% which, under

normal circumstances, would be expected to trigger rental growth. Using the five-year annual average take-up there is just 0.7 years worth of supply in the market.

3.27 A record 12.03m sq ft of space was transacted in 2020 across 32 transactions with demand coming from a diverse range of occupiers. The most active sectors, however, were third party logistics providers (3PLs) who took 46% of the figure compared to the long-term average of 17%, this was followed by grocery retailers and online retailers which accounted for 13% and 12% of the total take-up respectively. The remaining 29% of take-up was from a range of sectors.

Table 3.1 East Midlands Take Up (Savills, Jan 2021)



Source: Savills Research

The Increased Importance of Logistics During Covid-19 and Beyond (2020)

3.28 Tritax Symmetry and Turley prepared document highlights how Covid has changed the role of logistics.

3.29 The report notes that the year 2020 has seen logistics operations move into the spotlight, driven by Covid-19 and the national lockdown which necessitated a shift in the way goods are stored and moved around the country, particularly in reaching their final destination – the consumer.

3.30 **Ten years of forecast e-commerce growth occurred in the first month of the national lockdown** reflecting the pace of change in consumer spending patterns, which in turn influence warehouse floorspace demand.

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- 3.31 Between February 2020 (pre-pandemic) and October 2020, on-line sales values grew from 19.6% of retail sales value to 28.5%. The logistics sector was quick to respond, with national take up of warehouse space over Q1 – Q3 of 2020 at a record high of 38.6 million sqft. This exceeds average annual take-up of new space of 31.9 million sqft over the last five years.
- 3.32 Retail is driving take up, accounting for a third of transactions due to strong e-commerce growth, with other occupier sectors that have experienced increased demand during the pandemic (such as 3PLs, parcel carriers and food producers) also contributing significantly to leasing activity.
- 3.33 The report argues “that the planning system needs to support the continued delivery of space to enable logistics to effectively function as demand for space continues to grow.”

CoStar Market Report: Nottinghamshire June 2021

- 3.34 Nottingham is one of the smaller industrial markets in the East Midlands by size of inventory, with around 67 million sqft of stock, but it has been growing rapidly in the last couple of years, with increased occupier demand and an uptick in construction activity.
- 3.35 Net absorption remains positive after rising to the highest level on record in 2020, with sizable deals boosting volumes as the industrial sector continues to prove the most resilient of the property types.
- 3.36 With many occupiers requiring increased space to satisfy a surge in demand for online orders, particularly in the food, medical and essentials sectors, vacancies have remained relatively tight despite the amount of new space being delivered. Although some of the increase has been short-term, the potential exists for more permanent consumer spending changes with last-mile logistics and distribution requirements on the increase.

CoStar Market Report: Sheffield and Doncaster June 2021

- 3.37 Heading into the coronavirus outbreak, demand for industrial property in the Sheffield market was robust. Driven by retailers and delivery specialists taking advantage of the market's strategic location. The Sheffield Market is well connected by the M1 and A1 (M) motorway networks and as such is a key warehouse and distribution hub.
- 3.38 Strong levels of net absorption resulted in falling vacancies in recent years, but increased supply has softened the rate more recently, but with demand in many locations actually increasing since the beginning of the pandemic, vacancies are not expected to rise further.
- 3.39 Many occupiers are requiring increased space to satisfy a surge in demand. Although some of the increase is short-term is in response to the crisis, the potential exists for more permanent consumer spending changes, with last mile logistics and distribution requirements on the increase. On the

downside, manufacturing and physical store retail sectors are facing increased headwinds, threatening increasing vacancies in certain locations and submarkets.

3.40 In the past 2 years, developers have responded to these improved fundamentals, with around 2.8 million sqft underway in the market. The majority of recent developments have been build-to-suit, which has helped to keep vacancies low. However, speculative supply is expected to hit the market in coming quarters, around 60% of which is pre-let. Falling vacancies have supported strong rental growth in recent years but at a slower pace than the growth peak. The strength of the Sheffield industrial market has caused investors to take note. Sales volume has picked up considerably over the past two years, driven by robust investor appetite and sharp yield compression.

BPF Delivering the Goods 2020

3.41 The British Property Federation (BPF) published 'Delivering the goods in 2020' sets out the economic impact of UK Logistics Sector. In terms of the recent economic growth within the logistics sector, it contributes and supports businesses, employment and causes an increase in economic productivity.

3.42 In 2019, Logistics sector directly supports a minimum of 93,000 business in the UK. In comparison to 2014, the number of businesses within the logistics sector has grown by 66%. The logistics sector supports a minimum of 960,000 employees in 2019 in the UK, which has increased from 748,000 in 2013, which shows a growth of 23%. Logistics employment growth was due to the large growth in warehouses, which provided an additional of 87,000 employees (40%) in the warehouse operations, and road freight contributed to 74,000 employees (42%) and the rest of employment contributes to 18% in the logistics sector.

3.43 From 2019-2039, the employment in the logistics sector is to experience growth of 19%, which shows that it is "more than double the national growth rate for all sectors (7%)" (BPF, 2020, p.5). Therefore, the logistics sector is "expected to be a driver of national employment growth" (BPF, 2020, p.5).

3.44 Moreover, in terms of 'Technology': "Logistics companies are increasingly hiring technical staff or upskilling existing staff in IT skills to adapt to this change in operational approach." (BPF, 2020, p.6). "New service-orientated logistics companies are entering the market...to respond to changing requirements through application of digital technology." (BPF, 2020, p.6).

4. MARKET REVIEW – DEMAND ASSESSMENT

4.1 This section considers the performance of the logistics market in the A1 corridor PMA as defined here by considering a series of market indicators as well as that of key logistics parks in the area including: iPort, Doncaster International Railport, Sheffield Core, Manton Wood etc

Agents feedback on the A1 wider and inner area market position

4.2 Key message on the state of the market at present in the area:

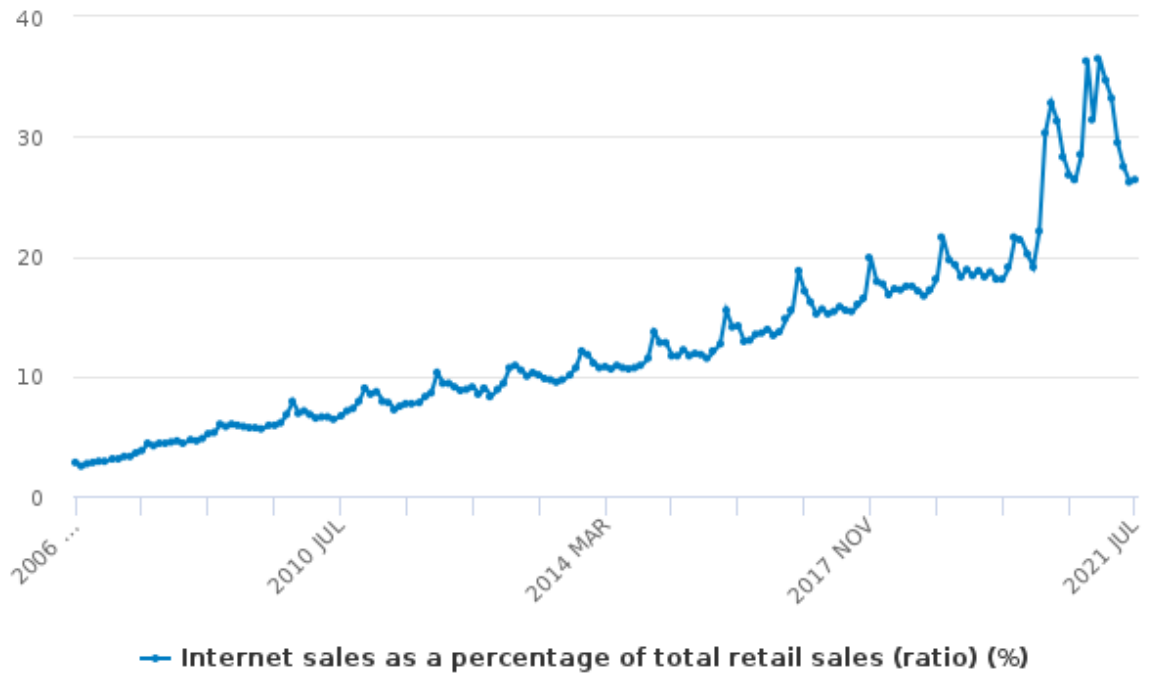
- Demand is at an all time high due to retain market restructuring and a move to online and e-commerce type deliveries.
- Occupiers are driving increased demand particularly for bigger units, higher units, bespoke units both logistics and manufacturing, which has direct implications on demand sites.
- All buildings over 100,000 sqft, are under offer or pre let which is a 'desperate' situation for occupiers trying to find space. Supply levels are considered an all time low for existing or under construction.
- Large sites take years to come forward but then are leased very quickly. iPort has been half filled in 5 years but should have taken 20 years.
- A1 corridor not seen as much activity historically but has seen a surge in demand as the M1 becomes increasingly supply constrained, congested and expensive.
- Take up is facilitated by supply as current demand is so high that all units absorbed when completed.
- Even sites with historic deliverability challenges are beginning to come forward as prices rise, as long as they are well connected to the strategic network.

Property market indicators

Demand drivers

4.3 As above the move to e-commerce is the single largest factor in driving demand for large scale warehousing at an unprecedented rate. The pandemic has accelerated this trend as reported by the ONS below. However market expectations are that it will not return to pre pandemic levels but continue at a much higher rate the previously. Warehouse space is therefore replacing traditional shopping space and it will take a significant period for this to achieve a new equilibrium in terms of warehouse space demand supply.

Table 4.1 National internet sales as % of total sales

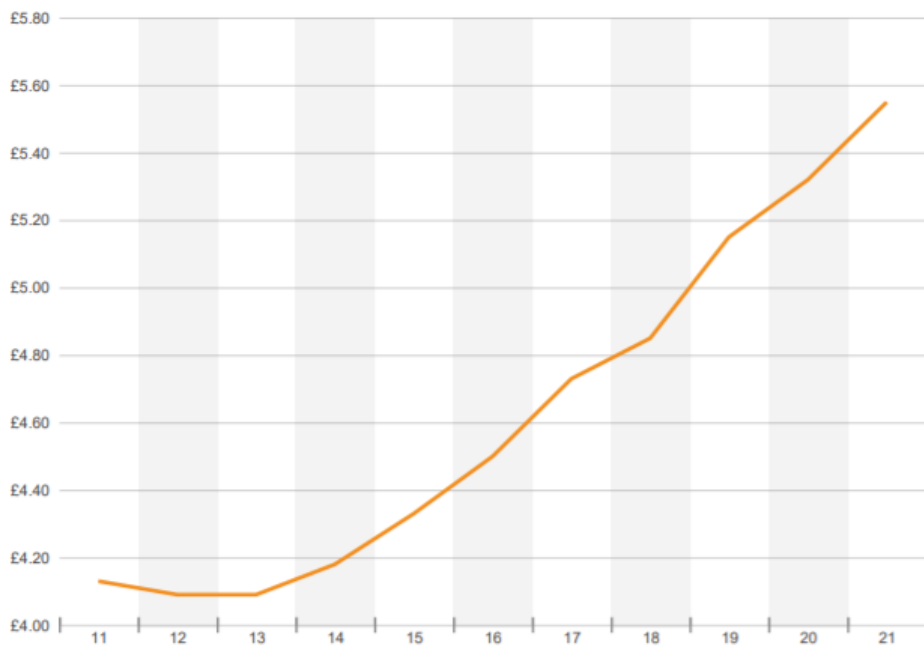


Source: ONS

Rents

4.4 Below we can see that market rents for larger units have increased steadily in recent years totalling around 40% gains for the 8 years 2013-21 and set to continue, indicating the increasing demand and tightness in supply.

Table 4.2 Market Rent Per Sq Ft 2011-21 (100,000 sqft+) Full A1 PMA

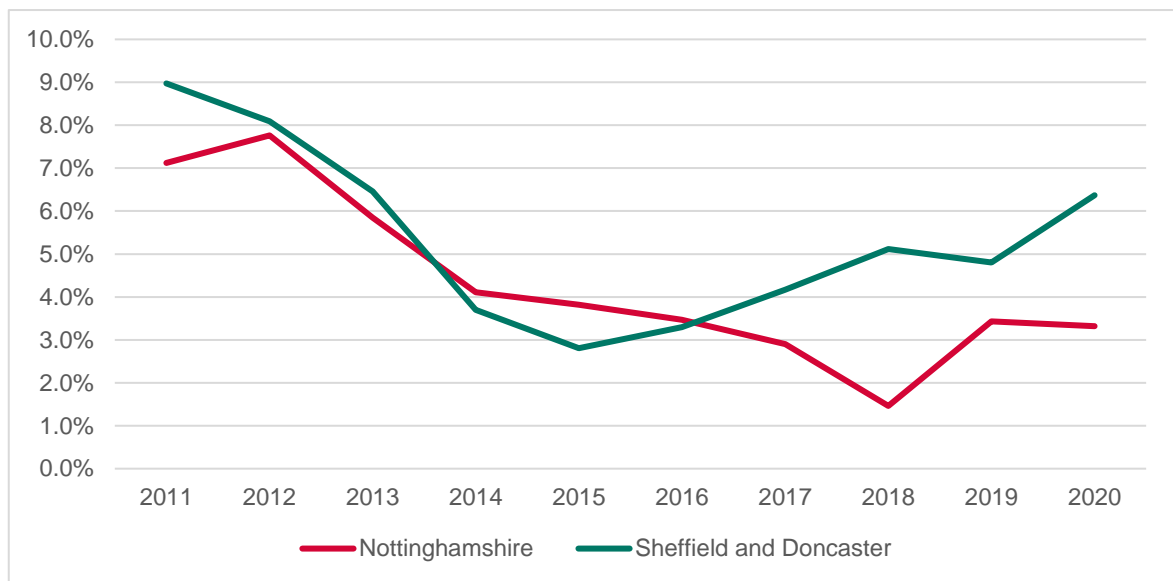


Source: CoStar

Vacancy Rate

- 4.5 The chart below sets out the vacancy rate for the Sheffield & Doncaster and Nottinghamshire industrial markets as reported by CoStar – a custom market study area vacancy is not available. Both show falling vacancy 2011-18 after the last recession as the market rebounded but supply failed to keep up. Since then the vacancy rate has stabilised presumably as supply has been brought to the market particularly in Sheffield/Doncaster. A vacancy range of 5-10% is considered healthy to allow for market choice. In this context the market is sitting at the tighter end of the spectrum with Nottinghamshire's smaller market remaining significantly sub optimal in its choice.

Table 4.3 Vacancy Rate 2011-20



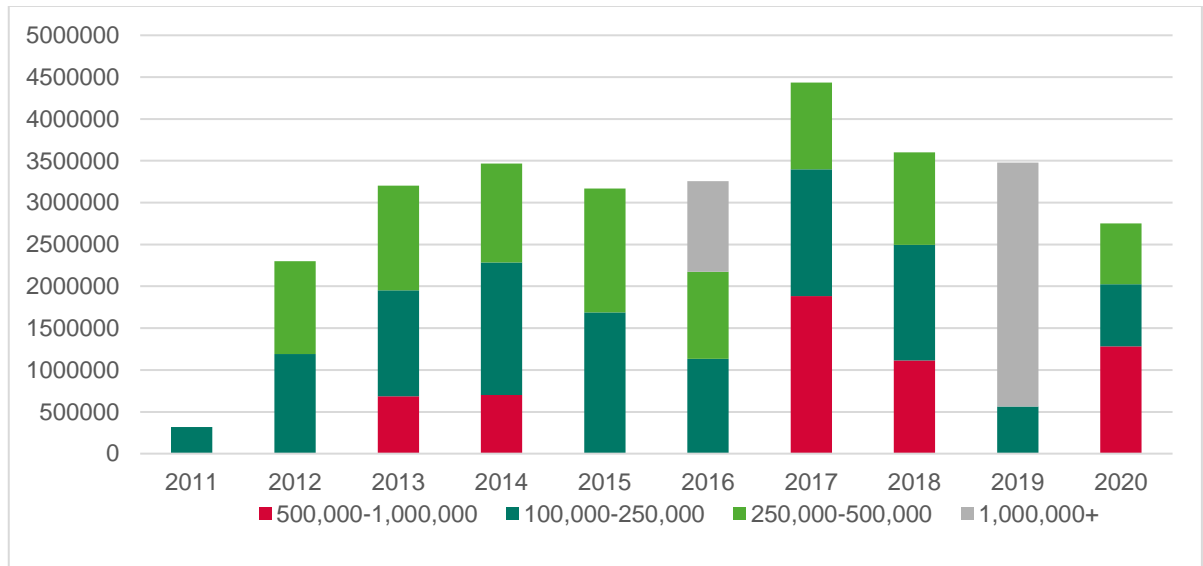
Source: CoStar

Take up

- 4.6 The chart below reports the annual take up (gross absorption) of large units over 100,000 sqft in the PMA since 2011, including leases and owner occupier sales. The average since 2015 (last 5 years) has been 3.5 million sqft per annum, even higher until 2020 which saw a slight fall to 2.7m sqft which may have been due to lack of available space. A substantial volume of floorspace is in the 100,000-500,000 sqft range although 2019 was dominated by even larger units (2 units of 1.1m and 1.8m sqft).
- 4.7 In terms of count, they were average 12 deals 2015 to 2020 dominated by the 100,000-250,000 sqft bands. The deal count has been steadily decreasing which may be due to combination of moves towards larger units and a lack of supply.
- 4.8 Looking back to post last recession period from 2012 to 2020, longer term take up rates have been consistently high through this period averaging 3.3 m sqft per annum, comparable to the last 5 years. Including 2011 prior to the market rebound post recession brings this down to 2.9m sqft per annum

due to the 2011 poor performance which we consider as anomalous representing a different trading paradigm. Market feedback indicates that take up in recent years has been restricted due to lack of supply and therefore under represents total need.

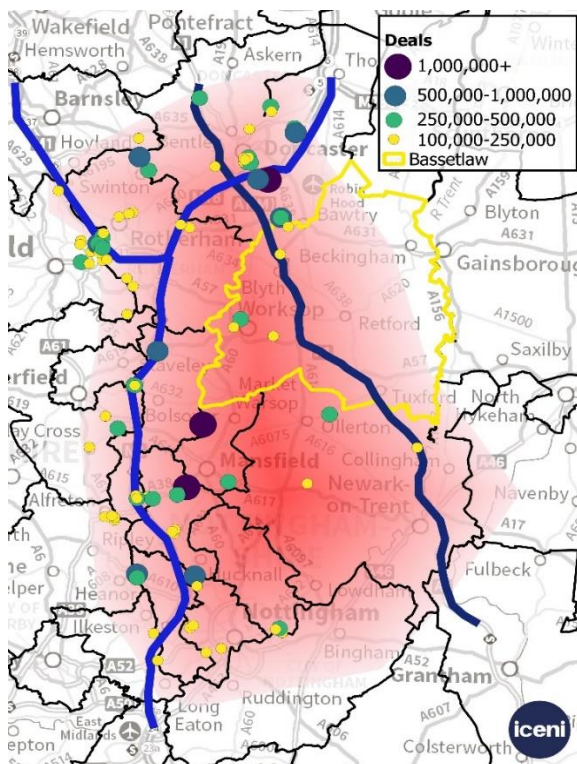
Table 4.4 Take Up 2011-20 (100,000 sqft+) Full A1 PMA (inc owner occ. sales)



Source: CoStar / Icen Analysis

4.9 The locations of the deals are shown below, concentrated on the M1/ M18.

Table 4.5 Take Up 2011-20 (100,000 sqft+) Diagram

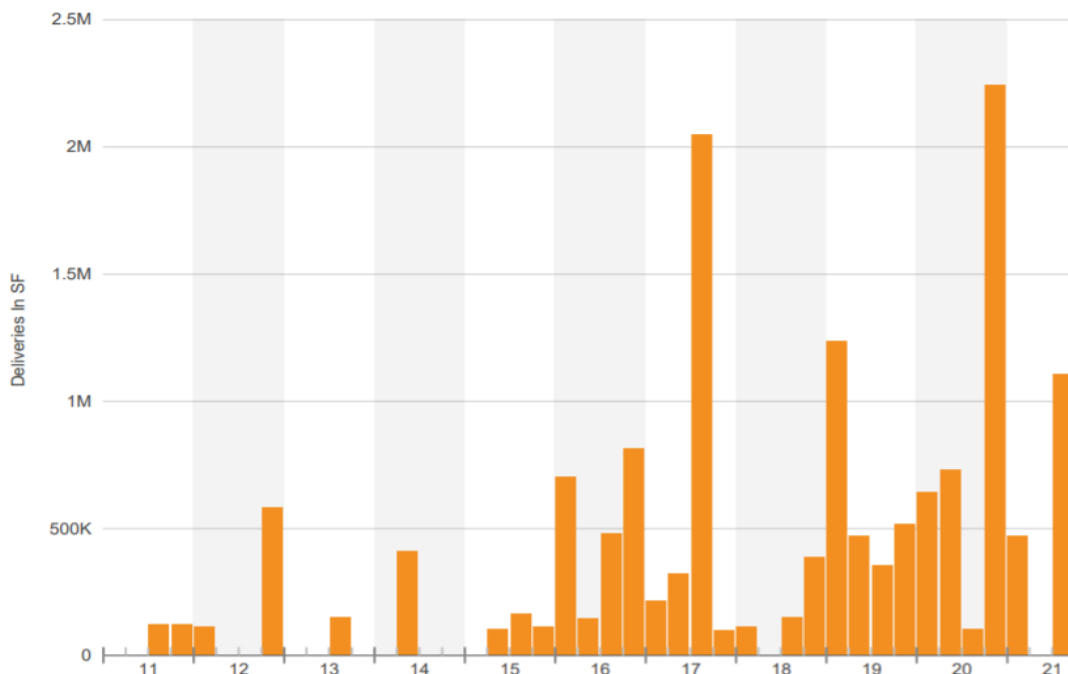


Source: CoStar / Icen Analysis

Deliveries (completions)

- 4.10 The chart below shows the new market deliveries (new floorspace) in the A1 PMA for larger units over 100,000 sqft over the last 10 years. This shows that a considerable volume of floorspace has been brought to the market particularly 2017 onwards as development seeks to keep pace with market demand.
- 4.11 The average for the last 5 years is 2.4m sqft per annum. This is lower than the 3.5 m sqft in take up, because some take up is facilitated by compressing vacancy and other deals are lease breaks generating market headroom in existing units. Based on current levels of low vacancy and high rental trends, this rate of delivery will (at least) need to continue for a sustained period to stabilise the market and the current rate is insufficient to match the demand terms. The Leicestershire Strategic Distribution Study 2020 estimates that the current high rate of delivery / completions will need to continue at least through the remainder of this decade to match levels of demand³. If the longer term average is used from 2012 then the delivery rate falls to 1.6m sqft per annum average. Based on the current rate of demand and the paradigm shift in warehousing requirements driven by e-commerce, this is considered to be insufficient to meet the property market needs. It also fails to incorporate the lag in delivery occurring between 2012 and 2015 as the construction / planning industry responds to demand.

Table 4.6 Deliveries 2011-20 (100,000 sqft+) Full A1 PMA



Source: CoStar / Icen Analysis

³ https://www.nwleics.gov.uk/pages/strategic_distribution_study see paragraph 10.33

Availability

- 4.12 The table below reports the current (June 2021) availability in the PMA as reported by CoStar. This is the data that will be available to agents, developers and occupiers – but it should not be confused with pipeline supply of land that is available through the planning system, considered in chapter 5.
- 4.13 The data highlights the extremely low availability of units in the current market or under construction compared to the average of 3.1m sqft of take up per annum for large units over the last 5 years or 2.4m sqft of deliveries. Units constructed pre 2000 may be less attractive to the market. Even with all ‘proposed’ units (which will fall under a range of different states in CoStar data) there is only 2-3 years of supply on the commercial horizon. With an awareness of the strength of demand and a lack of available or visible pipeline supply, developers will be keen to ensure more supply can be brought into the market.
- 4.14 This information provides perhaps the strongest indication of the state of the current market, with a continual requirement for new large scale units to be brought into the market to meet the demands of industry.
- 4.15 It is more common in large scale units for occupiers / developers to prefer prelet design and build, which means typically lower levels of vacancy on the open speculative market. However with only 2 units under construction, occupiers are likely to be experiencing significant constraints on their ability to locate in the area.

Table 4.7 Availability at June 2021 (100,000 sqft+) Full A1 PMA

Status	Total sqft	Class	Unit Count <100,000 sqft	Post 2000	Years supply (5yr annual av. take up)	Years supply (5yr annual av. delivery)
Existing	880,000	B/C	3	100%	0.3	0.4
Under construction	994,000	B/C	3	100%	0.5 (inc above)	0.8 (inc above)
Proposed	4,855,107	A/B	11	100%	1.9 (inc above)	2.8 (inc above)

Source: CoStar / Icenis Analysis

Performance of key logistics parks

- 4.16 The following have been identified as the most prominent parks by considering existing large unit clusters on the M1/A1 strategic network. Of note only Rockingham Way and Manton Wood are on the A1 and Manton Wood is the only A1 park south of Doncaster. This in itself indicates that demand on the A1 is more nascent and emerging in response to saturation on the M1.

-
- Doncaster iPort
 - Doncaster Balby Carr Bank / Trax Park
 - Doncaster M18 J4
 - Doncaster A1M J38 Rockingham Way
 - Sheffield Core - Europa Way / Europa Link / Shepote Lane
 - Manton Wood Business Park, Bassetlaw
 - Chesterfield Markham Vale M1 J29A
 - Bolsover M1 J28 Castlewood Business Park inc Common Rd, Famwell Lane, Berristow Lane
 - Ashfield Sherwood Park M1 J27

Doncaster iPort

- 4.17 Prominent new logistics park on M18 J3. Currently 2.6m sqft fully occupied. Potential to reach 6m sqft of which 2.4m sqft available in proposed units ranging from 66,00 to 800,000 sqft. The 2.6m sqft leased 2016-2020 at 0.7m sqft per annum. Projected full at 2025.

Doncaster Balby Carr Bank / Trax Park

- 4.18 Two zones east and west of the Rail Terminal. Around 28 units totalling 3.7m sqft of which 13 are over 100,000 sqft totalling 3.4m sqft. No availability. 8 deals since 2011 averaging 0.2m sqft per annum. One further sale of a manufacturing building in 2017.

Doncaster M18 J4

- 4.19 Large and small scale industrial offer. 47 units at 5.6m sqft of which 8 are over 100,000 sqft totalling 5.1m sqft. 1 large units available 400,000 sqft built 2020. 4 large deals since 2014 totalling 1.3m sqft or c190,00 sqft per annum.

Doncaster A1M J38 Rockingham Way

- 4.20 8 properties totalling 3.4m sqft, no availability. All over 100,000 sqft. 2 large deals recorded since 2011 totalling 530,000 sqft or c50,000 sqft per annum.

Sheffield Core

- 4.21 44 properties of which 9 properties over 100,000 sqft. Total 5.1m sqft of which 4.3m sqft larger properties. One unit of 100,000 sqft (1997) listed as available. Two further large units (but under 100,000 sqft) proposed at Bessemer Park of 82,000 sqft 94,000 sqft. 6 deals recorded since 2013 totalling 1.7m sqft or 200,000 sqft per annum. Two further sales in recent years 180,000 sqft. New units expected to be taken within a year based on trend.

Manton Wood Business Park, Bassetlaw

- 4.22 15 properties totalling 3.5m sqft of which 7 are over 100,000 sqft totalling 3.3m sqft. One existing 70,000 sqft unit to let built in 1997. One further 335,000 sqft building proposed which is prelet. 4 deals completed since 2013 totalling 500,000 sqft or 70,000 sqft pa. Two sales (same building) in recent years, 140,000 sqft.

Chesterfield Markham Vale M1 J29A

- 4.23 32 industrial listed properties totalling 1.3m sqft of which 3 are over 100,000 sqft accounting for 0.7m sqft. No large properties available. Two new units proposed of c200,000 sqft each, of which one available and one prelet. 3 large deals completed since 2015 totalling 680,000 sqft or 115,000 sqft pa. New available units have 3-4 years absorption based on trend.

Bolsover M1 J28 Castlewood Business Park

- 4.24 70 properties totalling 5.1m sqft of which 14 units over 100,000 sqft being 3m sqft. None available. Six properties proposed generating 1.3m of which 3 units not prelet bringing 460,000 sqft to market open. 8 deals completed since 2012 totalling 2.0m sqft or 220,000 sqft per annum. One sale in 2013 of a 50,000 sqft manufacturing unit. New units have a 2 year projected take up based on trend.

Ashfield Sherwood Park M1 J27

- 4.25 28 units providing 1.8m sqft of which 7 over 100,000 sqft being 1.0 sqft. One warehouse available built 1998 80,000 sqft. None proposed. 3 large deals since 2017 accounting for 500,000 sqft or 125,000 sqft per annum. One further sale in 2020 of an 80,000 sqft warehouse.

5. SUPPLY ASSESSMENT

- 5.1 As noted above the units available or under construction in the current market have less than 1 year of supply based on past take up. The proposed supply in the commercial assessment tends not to be uniform in its status but typically has full planning permission and is near market ready. However there will be a substantial further pipeline of permissions not captured, as well as additional allocated supply not yet brought forward, which is relevant to consider in the total supply planning terms.
- 5.2 A desktop exercise has been undertaken to assess the level of future supply. This has not involved the authorities in the wider PMA. This relies primarily on two key documents which record the overall employment supply, being:
- Nottingham Core HMA and Nottingham Outer HMA Employment Land Needs Study (ELNS) Report May 2021; and
 - Sheffield City Region Strategic Employment Land Appraisal (SELA) Report May 2020.
- 5.3 Sites identified in these documents have been considered as suitable supply using the following criteria:
- Within PMA as defined herein
 - Minimum 2.4 ha net area, assuming 100,000 sqft (9,000 sqm) unit requires 40% plot ratio
 - Proximity and connection to the strategic road network
 - High level assessment based on allocation, current use, ownership (where known), application status or other publicly available promotional material ie masterplan
- 5.4 The full assessment is provided in appendix A and findings summarised below. Where known the plot or floorspace has been used to fill out further details, estimates in appendix A are italicised. Here where an application is not permitted or allocation without application exists judgment has been used on site potential. Inevitably this exercise is subjective due to data limitations and the need to rely on professional judgement. This is considered acceptable given the study is not a joint logistics assessment to determine need and supply for all authorities, but rather an effort to consider the role of the Bassetlaw A1 element in the wider PMA.
- 5.5 The summarised assessment indicates that Doncaster has the largest supply of future strategic sites including iPort, and J6 M18 Thorne North.

5.6 Thereafter Bassetlaw has the greatest supply although the draft allocation at Apleyhead Junction makes up much of this and would be the single largest logistics development in the PMA.

Table 5.1 Indicative supply of future strategic distribution, full PMA

Authority	Area for large units (Ha) est.	Sqft known or est.	Comment
Bassetlaw	220.1	7.5m	Apleyhead Junction, Worksop contributes 119 ha / 4.4m sqft alone
Barnsley	41.9	1.3m	PMA area only (Hoyland / Deane valley)
Bolsover	63.3	1.1m	Focus at Coalite Strategic Regeneration Site
Chesterfield	24.7	1.1m	Focus at Staveley, assumes large unit brought forward
Doncaster	174	8.2m	iPort and Thorne North large capacity
NE Derbyshire	18.8	500,000	Focus at Coalite
Rotherham	50.8	1.7m	
Sheffield	10.3	400,000	Bessemer Park
Erewash	28	1.2m	Positive assumptions about future of Stanton Regeneration, currently no planning status
Nottingham	23.1	600,000	Permissions at a number of allocated sites
Ashfield	16.8	700,000	Primarily at Harrier Park
Newark	53.1	2.4m	NSDC23 Land south of Newark masterplan indicates large units; NSDC3 Land off Beacon Hill Road marketed for large units
Total	725	27.1m	

Source: CoStar / Icen

5.7 The table below puts the supply in context of the historic take up and net deliveries.

5.8 This demonstrates that there is around 8 years worth of future supply based on take up, or 11 years of historic deliveries. The take up model is inaccurate as may include some over estimated needs as take up can be accounted for by leases into space vacated by lease breaks, but at the same time has seen recent constraint by lack of supply which (combined with rising rents) points to repressed market activity. As note previously, using a long term take up trend makes little difference to the outcomes. Again deliveries are likely to significantly under represent future needs given that the

market is currently too constrained (represented by low vacancy and rising rents alongside market feedback) and clearly lacking a very low immediate availability, suggesting the recent past has not kept up with actual market / business need. A long term take

5.9 It is of note that the Apleyhead Junction site accounts for 4.4m sqft of pipeline or around 1.5 years (1.4 yrs of take up, 1.8 yrs of deliveries) of historic requirements alone, which is already factored into the below table.

Table 5.2 Supply and balance at June 2021 (100,000 sqft+) Full A1 PMA

Status	Total sqft	Av 5 yr Take Up (sqft)	Av 5yr Deliveries (sqft)	Years supply (5yr annual av. take up)	Years supply (5yr annual av. delivery)
Existing units (Chpt 4)	0.9m	3.5m	2.4m	0.3	0.4
Planning Pipeline (App. A)	27.1m			7.7	11.3
All	28.0m			8.0	11.7
All (exc unallocated / exc PP)*	26.8m			7.7	11.2

Source: CoStar / Icen Analysis

* Stanton Regeneration 1.2m sqft

5.10 When considering this level of supply it is useful to emphasise:

- Use of judgement in the assessment process
- A positive approach to assessment, notably including a limited number of undecided or proposed developments, if the most significant (Stanton Regeneration 1.2m sqft) is deducted then the total pipeline falls to 7.7-11.2 years of take up / delivery (or 6.4-9.3 exc Apleyhead Junction)
- That Local Plans should ideally plan for 15 years of future needs
- That the market for strategic distribution is presently very acute and historic take up and deliveries may underestimate requirements in the next economic cycle

5.11 Taking the above points in the round, and considering the PMA assessed here, based on historic take up / delivery, the total levels of supply are likely to be inadequate for the future 15 year period of local planning. Bassetlaw's Apleyhead Junction site appears to make an important contribution to the overall need.

5.12 The 15 year period is considered appropriate given that the NPPF Para 22 says strategic policies should look ahead a minimum of 15 years, with Footnote 15 saying except for retail. By implication there is an expectation that plans will look at supply 15+ years into the future and Government's

intension in setting this out is that plans seek to meet development needs over this length of period. In Icen's view this should be read with NPPF Para 82 which says planning policies should set out a clear economic vision and strategy, plus set criteria for or identify strategic sites for local and inward investment and to meet anticipated needs over the plan period, and to allow for flexibility to accommodate needs not identified in the plan and enable a rapid response to changes in economic circumstances. This para does relate specifically to employment. Given the property needs of businesses vary, it is important to maintain a choice of sites within the market/ sub-region. Furthermore given the dynamic nature of the current market and the trend of growth in e-retailing (as above), a 15 year period is entirely justified.

- 5.13 The Nottingham ELNS, which does not attempt to quantify the logistics position, reflects that based on stakeholder comment *there is capacity in the market for a further one, or even two, very large regional distribution centres near to these key M1 junctions and that at current levels of demand, two such schemes, if made available, would be at capacity within a decade.*
- 5.14 In the present study we aggregate the south / east SCR area with the Nottinghamshire position, but find that even with the significant supply in Doncaster, the wider M1 / A1 corridor supply levels are around 8 years' worth of past take up / 11 years of delivery. Whilst this is significant, it indicates that when planning for 15 years or more in the Local Plan process, there is likely to be insufficient supply overall.

6. ROLE OF THE A1 IN WIDER MARKET CONTEXT

6.1 The demand and supply assessment considers the full PMA as defined herein, accounting for occupiers seeking strategic space across Nottinghamshire and South Yorkshire. In the context of providing advice to the Bassetlaw Local Plan making progress, it is necessary to focus on the role of the A1 corridor - Doncaster to Newark - in the wider PMA.

6.2 Specific property market agent engagement was undertaken on the role of the A1. Comments need to be considered in the light of the key requirements for strategic operators being:

- labour availability;
- access to customer base via strategic road network; and
- large scale land plots.

6.3 The key messages, supplementing those in chapter 4, are that the A1 has become significantly more attractive in the last 2 years as:

- Very significant changes in macro trends – ecommerce requirements – leading to demand for bigger units, higher units, bespoke units both logistics and manufacturing, with a significant lack of availability on the M1 corridor north of Castle Donnington to Sheffield.
- M1 is very constrained in terms of greenbelt designation, A1 area has greater availability of land and in the current market it is simply a case of available land in the area of search.
- People looking further afield than previously from core markets due to labour market availability.
- Land on the M1 tends to be controlled by major institutions, whereas the A1 tends to be more flexible and provides new opportunities including for owner occupiers.
- The A1 is not as traffic congested whilst the M1 is increasingly problematic for movements.
- The A1 is overall a cheaper location for land and rents.
- Occupiers willing to look at broader areas, increasing typical search from 25 mile to up to 50 mile – 100 mile radius.
- Good connectivity to the M1 via A57.

-
- Rate of take up at iPort has been phenomenal - half of the scheme has gone in 5 years that should have taken 20 years – this is driving the developer / occupier market to search for more land in the sub region.
 - The market has shifted from 100-150k sqft buildings to over 500,000 sqft, with additional land implications and a very significant undersupply of suitable quality sites.
 - Bassetlaw already has a number of significant warehouses – Wilkos, B&Q, DHL – and is already an established location.
 - Doncaster is considered to have a reasonable level of supply however Nottinghamshire's M1 supply is very tight and this has generated demand pressure into the A1 and M18.
 - A1 corridor authorities tend to be more pro growth having not had the historic investment from logistics occupiers.

6.4 The above messages are useful and develop a clear picture of the enhanced role of the A1 in the logistics market. In a period of fast rising demand responding to structural economic change, the lack of supply and policy constraints on the M1 has shifted focus onto the A1 which is able to provide levels of connectivity and labour sufficient to attract strategic occupiers. This is not to negate the role of the M18 and the benefits of forthcoming supply, but rather a manifestation of a supply demand imbalance in the wider area.

7. CONCLUSIONS

7.1 The key findings of this report are:

- That as a FEMA, Bassetlaw is broadly self contained but has strong links to Sheffield City Region and further links to Nottinghamshire authorities to the south.
- In terms of the property market areas for large logistics, engagement with industry indicates that the A1 (Doncaster to Newark with Bassetlaw at the core) is contained within a larger demand area paralleling the M1 corridor running from Nottingham to the near side of Barnsley.
- The wider literature reports that the effects of the Covid-19 pandemic have drastically increased demand for large scale logistics facilities and that current supply levels in many areas are inadequate to meet business needs. The Sheffield / Doncaster market is considered to have greater responsiveness to this demand although the majority of market ready pipeline supply remains prelet.
- In the study area rents have continued to rise, whilst vacancy for larger units remains below the market optimum. Leases on units have averaged 3.5m sqft per annum on average of the last 5 years and completed floorspace 2.4m sqft per annum. At the time of writing only 3 existing large units are reported as available. Of existing logistics parks reviewed in the study area only iPort has significant expansion plans.
- A desktop based supply assessment of the South Yorkshire / Nottinghamshire authorities within the PMA for sites able and likely to accommodate large scale units suggests up to 30m sqft of future supply or in the region of 8 years based on past take up / 11 years of deliveries but this falls to 6.4 / 9.4 years without Bassetlaw's Apleyhead site. Doncaster makes the greatest contribution to the pipeline.
- The A1 area encompassing Bassetlaw and surrounds has seen a dramatic rise in logistics interest as the M1 becomes increasingly congested with constraints on available land and pipeline supply for logistics. It has connectivity, available labour and land to meet logistics needs that the wider PMA is currently not sufficiently providing.

7.2 The conclusions and recommendations arising are:

- That the role of the A1 and notably the Bassetlaw section that is connected to the M1 (via A57) and M18 has changed rapidly in recent years. Whilst Manton Wood Business Park has historically hosted a number of distribution businesses, the dramatic rise in demand for large scale logistics at a national level, combined with a series of supply side constraints on the

M1, has led to the better connected and labour served areas of the A1 becoming an attractive prospect to developers and occupiers alike. The role is therefore now as a secondary or sister logistics market to the M1 corridor.

- One of the challenges arising from this study is the separation or integration of FEMA and PMA geographies. Bassetlaw's A1 is influenced by both the M1 running south to Nottingham and north to Hoyland and the M18 corridor to Thorne. This crosses the SCR, which Bassetlaw was formerly a part, D2N2 LEP and the Nottingham Inner / Outer HMA. Considering the supply data, SCR is far better served whilst supply is limited in Nottinghamshire. The ELNS recognised the logistics market undersupply and it is possibly that a greater volume brought forward would deflate the A1 corridor. It could be inferred that significant supply in Bassetlaw is meeting some of the Nottingham Inner / Outer HMA logistics needs however **it is not** the role or intention of this study to ascertain the Nottingham HMA logistics requirements, rather to provide a perspective on the role of the A1 in the overall PMA.
- Notwithstanding the above point, based on the research undertaken herein, it seems reasonable that Bassetlaw does bring forward large sites such as Apleyhead Junction, that these are desired by the market and will not lead to an oversupply in the medium term across the South Yorkshire / Nottinghamshire / Derbyshire authorities as assessed in the PMA. The assessment suggests around 8 years of supply, based on past take up, is in the pipeline, and this is substantial, particularly in Doncaster. However with Local Plans expected to be provided for 15 years or more; and indicators suggesting the recent past rate of take up / delivery under represents future need; on balance the sites in Bassetlaw (most notably Apleyhead Junction) and most likely further sites in the southern part of the PMA will be required. This aligns with the ELNS conclusions.

APPENDIX A

Table A0.1 2001-19 and 2011-19 employment change

Site Name	Gross Area (ha)	Net Area (ha)	Authority	Remaining for large units (Ha) est.	Sqft known or est.	Status	Comment
Bassetlaw – Derived from HEDNA 2020 / Draft Local Plan 2020							
Manton Wood Extension	24.6	10.7	Bassetlaw	7.8	335,000		Total site expansion is approximately 93,000 sqm for large scale units. One built out, one further unit remaining of 335,000 sqft
Shireoaks Common	26	7.5	Bassetlaw			PP	18/00413/OUT indicative masterplan shows no units over 100,000 sqft
Symmetry Park	22	2.8	Bassetlaw	12.7	541,500		Remaining area according to website particulars, two large units
Welbeck Colliery	26.9	3	Bassetlaw			Draft allocation	Draft Local Plan allocation indicates 3ha employment area, EDNA refers to Rural Enterprise Hub
Carlton Forest	0.6	5	Bassetlaw			Draft allocation	Draft Local Plan allocation indicates 5ha employment area. Not well connected to strategic network.
High Marnham Energy Hub	60.0	38.4	Bassetlaw			Draft allocation	Draft Local Plan allocation indicates 38.4ha employment area. <i>The site offers a unique opportunity to support specific employment uses within the renewable energy and low carbon</i>

							<i>technology sectors. Not well connected to strategic network.</i>
Trinity Farm	8.0	5.0	Bassetlaw		-	Draft allocation	Mixed use development, not well connected to strategic network.
Explore Steetley	47	16	Bassetlaw			Draft allocation	This site is labelled for manufacturing and assembly for modern methods of construction.
Apleyhead Junction, Worksop	189	118.7	Bassetlaw	118.7	4,420,000	Draft allocation	HEDNA estimates 413,000 sqm, planning application forthcoming. Caddick website refers to 'over 4m sqft'.
Snape Lane, Harworth	80.9	80.9	Bassetlaw	80.9	2,150,000	PP	Planning permission for c200,000 sqm,
Bassetlaw's Garden Village	15.0	10.0	Bassetlaw			Draft allocation	HEDNA 2020: higher value sector investment opportunities at the garden village will be supported by traditional units and flexible modern workspaces and offices. Focus away from strategic B8.
Sub Total Bassetlaw estimated area				220 ha			7,446,500 sqft
SELA area (exc Bassetlaw) *Barnsley sites outside of Primary PMA							
Land West of Sheffield Road, Hoyland (Equines Park, Barnsley)	49.39	37.04	Barnsley	9.02	386,056	UC	Hoyland West Masterplan shows Plot 1 (18.35 ha), Plot 2 (9.02 ha), Plot 3 (5.09 ha), Plot 4 (2.03 ha), Plot 5 (1.70 ha). Plots 1 and 2 earmarked for large scale employment.
Shortwood Extension, Hoyland (Allocation ES15) (Gateway 36 Phase 2)	11.81	5.79	Barnsley	5.79	247,812	UC	Planning permission granted for Phases 2 and 3 of Gateway 36 in Oct 2020. ES15 allocation laid out with 2 units - Unit 9 (27,500 sq.ft) and Unit 10 (275,000 sq.ft)
Rockingham (allocation ES14), Hoyland	4.43	4.43	Barnsley	3.45	147,660	Allocation	Owned Barnsley Council. No planning application but access to site is from roundabout in place. Icen

							estimate developable area of 3.45 (measured) providing capacity for 150,000 sq.ft unit
Rockingham (allocation ES14), Hoyland	2 91	2 1	Barnsley	0			Owned Hartwood Estates. Traingular shaped plot. Will not accommodate big box logistics
Ashroyd, Hoylands (Allocation ES18)	6 17	4 17	Barnsley	0			Remaining plot granted outline consent July 2018 for 9180 sq. GEA. Network Space Developments. Two options proposed - for four units; and for single large unit of 8779 sq.m GIA. Below required size.
Land South of Dearne Valley Parkway, Goldthorpe (Allocation ES10)	72 9	54 6	Barnsley				Masterplan: Focus on offices, research and development and industrial uses in Class E.
Land South of Dearne Valley Parkway, Hoyland (Allocation ES17) (Gateway 36 Phase 2)	28 16	21.12	Barnsley	21.12	451,000	UC	Also comprises Phase 2 of Gateway 36. Indicative masterplan shows 8 units, of which two are > 100,000 sqft. Unit 7 (280,500 sq.ft) and Unit 8 (170,500 sq.ft). Initial earthworks to be completed Summer 2021. Developer is Harworth Group
Land East of Park Spring Road, Houghton (Allocation ES22)	7 55	6 8	Barnsley	2.5	100,000	Allocation	Having regard to shape and woodland, we estimate 2.5 ha developable site. Land owned by Harworth Estates. No planning application. Existing XPO Logistics Warehouse adjoins
Former Whitewell Colliery Strategic Site (LP Allocation) (Whitewell Tip)	6 60	5 61	Bolsover			Allocation	Local Plan allocation for 5.5ha. B1/2/8. Outline application submitted Sept 2018 for 450 homes and c. 6 ha of employment. Mine shafts constrain development potential. Planning Statement

							<p>Addendum states employment to be delivered in 3 distinct phases - c. 2ha each in 2024, 2029 and 2034.</p> <p>Employment land at south of site to be accessed through Whitewell Village. Unsuitable for strategic B8.</p>
Clowne Garden Village	24 97	20	Bolsover	23.9	95,700	Allocation	<p>Local Plan Allocation for 20 ha. B1/2/8. Developers Waystone and Sitwell Estates. Outline application submitted for 1800 homes and up to 24 ha of employment land (B1/B2/B8) in December 2017 (17/00640/OUT). Resolution to grant, u Employment for B-class uses is 21.1 ha. Considered suitable for B8 with separate access. Located close to M1 J30.</p>
Coalite Strategic Regeneration Site (Horizon 29)	36 62	29 3	Bolsover	24	735,700		<p>Developers St Francis Group and iSec. Outline application which included B2 and B8 development granted Dec 2015 (14/00089/OUTEA). Masterplan showed B2/B8 development in Plot 8 (3.82 ha) for 139,480 sq.ft, Plot 6 & 7 open storage (177,143 sq.ft) and Plot 4a (419,096 sq.ft). Subsequent RM applications come in for Plot 6 (201190 sq.ft), Plot 7 (133474 sq.ft), Plot 8 (73174 sq.ft), Plot 4a (105486 sq.ft) and 4b (310754 sq.ft) (Refs 19/00343/REM and 19/00316/REM). RM application for Plot 5 also determined in 2020 (113926 sq.ft unit).</p>
Land off Explore Way, Steetley (Explore Industrial Park)	13 49	11 47	Bolsover				<p>Application granted in July 2015 for 49,847 sq.m B2 industrial building plus service yard</p>

Erin Road, Markham Vale (Orion)	11 98	5 99	Bolsover			Complete	RM application granted for this site (6.31 ha) for two units - 221,518 sq.ft on 4.51 ha plot, and 75500 sq.ft on 1.8 ha plot
Land at Wincobank Farm, South Normanton (Park 38)	14 56	13 1	Bolsover	15.4	310,000	OPP	Local Plan Allocation for 14 ha B2/B8. Planning applications for front/rear parts of site in 2018 with retail frontage application subsequently called in and withdrawn. But application for B8 development of whole site granted March 2021 for up to 55,742 sq.m B8 floorspace (20/00295/OUT) with frontage hotel development (95 bed C1). Two units proposed - Unit 1 (360656 sq.ft) and Unit 2 (239335 sq.ft). Site area shown on plans at 15.4ha. Limes Developments Limited
Vernon Street, Shirebrook	12 10	9 08	Bolsover				No evident planning applications. Site appears to be in multiple ownerships - part owned by Council, part Acorn Mouldings, part another freeholder. This area is 3.1 ha. Further area to South of 5.4 ha (immediately to North of Sports Direct) owned by Land Restoration Trust. This area is not however allocated for development. Immediate adjacency to residential and access to site mean unsuitable for large scale B8.
Station Road (Wagon Works), Old Whittington Chesterfield	6 31	6	Chesterfield				Allocation identified in 2018-35 Local Plan - Station Road (Wagon Works) 6.3 ha - Site E3. Identified in trajectory in Appendix E for longer-term (11-16 year delivery). Accessible via Whittington Way from A61.

							Poor quality part brownfield site in urban location with residential adjoining along Holland Road. Constrained access and flooding issues (within flood zone). Would not be commercially attractive for large scale B8.
Markham Vale East	0.80	0	Chesterfield				Below site size threshold. Not capable of accommodating big box industrial/ logistics. HBD Development webpage not showing any large / big box opportunities
Markham Vale East Plot 5 North	0.75	0.75	Chesterfield				Below site size threshold. Not capable of accommodating big box industrial/ logistics
Markham Vale West Plot 2	1.47	1.47	Chesterfield				Below site size threshold. Not capable of accommodating big box industrial/ logistics
Markham Vale North Plot 1	2.20	2.2	Chesterfield				Below site size threshold. Not capable of accommodating big box industrial/ logistics
Former Hartington Colliery/Hartington Tip, north of Staveley	20.37	20.37	Chesterfield	20.37	963,000		2018 SHLAA identified that planning permission in place for minerals extraction; after which commercial development. Was identified in SHLAA as unavailable for development. Access from B6053 Eckington Road. Appears to be previously operated by Cemex as Staveley Asphalt Depot. Owned now by Tawneywood Limited. Understand currently being restored and has planning permission for industrial & warehouse development of up to 90,000 sq.m or a number of smaller units. Potentially rail connected.

Former Boythorpe Works, Goyt Side Road	8 92	4 29	Chesterfield	4.29	185,000	Allocation	Extant allocation in 2018-35 Local Plan. Identified as 5.0 ha. Accessed from Dock Walk/Goytside Road from A619. Cleared brownfield site. Consent granted on site opposite for residential redevelopment (Corner Factory St - CHE/17/00756/OUT).
Staveley Works Corridor - site SS5	188 09	179 08	Chesterfield				Dec 2020 Staveley Town Investment Plan identifies that landowners - Devonshire Group (Chatsworth Estate) and St Gobain are planning a new garden village of 1,500 homes. Development potential reliant on Chesterfield to Staveley Regeneration Route (CSRR) providing connection to Chesterfield Town Centre. Focus on rail engineering and HS2 Maintainance Centre Local Plan allocation SS5 for the Staveley & Rother Valley Corridor envisages 1500 homes, with employment opportunities focused on Hall Lane end of corridor and around Works Road. At Works Road up to 10ha of B1 employment envisaged. At Hall Lane approx 30ha within B1/B2/B8 subject to precise HS2 issues. Remains dependent on funding for Regeneration Route. Outline application submitted for 700 homes, 3000 sq.m employment space, 3,500 sq.m community space, 3000 sq.m leisure/recreation and 2FE primary school (CHE/19/00103/OUT). Provides for B1

							floorspace. Further application (CHE/17/00644/OUT) for 590 homes and associated facilities. No proposals for strategic B8 floorspace.
Land at Carcroft Common, Carcroft	49 28	24 64	Doncaster				Removed as an employment site allocation in LP Main Modifications and included instead as potential employment development site as not currently considered to be developable in the plan period to 2035. Requires road improvements to A1(M) and A19 and to mitigate flood risk
Askern Saw Mills, High Street, Askern	15 08	13 57	Doncaster	2.27	9100	Extant PP	Area remaining for employment use listed as 2.27 ha in Local Plan (Main Modifications) Table E6. Reflects position as at April 2018. Average/poor quality site; rural village location. On A19.
Plot 1, Lakeside, Middle Bank, Doncaster	8 48	5	Doncaster				Council owned site. Designated employment land. Council sold 1.61 ha to MHCLG for development of Free School (XP East). Application submitted for warehouse development (19/06183/IN) in March 2019.
Doncaster Sheffield Airport Ltd , First Avenue Auckley (Aero Centre Yorkshire)	13 17	13 17	Doncaster	18.8	624,000	OP	Link road to M18 J3 delivered. Planning consent in place for over 2m sq.ft commercial space B1/2/8. Masterplan shows 1 x 250,000 sq.ft unit, 1 x 157,000 sq.ft, 1 x 115,000 sq.ft, 1 x 102,000 sq.ft plus a number of smaller units. 250,000 sq.ft unit identified as airside. Infrastructure delivered to provide serviced plots. Peel L&P

Blaxton Quarry, Mosham Road, Auckley	9 47	9 47	Doncaster	3			Doncaster Local Plan Table E7 identifies remaining developable land of 3.0ha. Existing quarry. Outline application for use of land by a crane hire business (19/02884/FULM) submitted Nov 2019 and awaiting decision.
McCormick Tractors International, Wheatley Hall Road, Wheatley	41 41	9 5	Doncaster	6.5	280,000	OPP	Local Plan Table E1 describes as an allocation with planning permission. 9.5ha of land remaining in 2018. Located on A630 on northern side of Doncaster. Outline application for mixed use scheme comprising of class B1, B2 and/or B8, trade counter, sui generis (roadside use), residential (class C3), care home, a community hub (class A1, A3, A4, A5 and class D1 uses), leisure use (class D2) and open space - granted March 2017 (16/02060/OUTM). RM for 188 dwellings granted to Barratt in Sept 2020 (latest 20/02442/MAT). Harworth Estates. Revised application (19/01772/OUTM) granted Nov 2019. This includes provision for up to 15,820 sq.m B1c/B2/B8, plus up to 4180 sq.m B1 trade uses, 5862 sq.m motor trade (sui generis). Estimate 6.5ha of potential land based on masterplan
Land West of West End Lane, Rossington (I Port)	398 31	158	Doncaster	57	2,440,900	OPP	Local Plan Table E4 identifies this as allocated site with planning permission with 79 ha remaining land as at April 2018. I Port website shows Units 1a (144,500 sq.ft), 1b (101,900 sq.ft), 2a (178,000 sq.ft), 4

							(817,000 sq.ft), 5 (330,000 sq.ft), 6 (72,000 sq.ft), 7 (164,500 sq.ft), 8 (332,000 sq.ft) and 10 (372,500 sq.ft) as available. Commercially attractive site - has seen development for Lidl and Amazon. On M18 with Rail Terminal
Land South of Holme Wood Lane, Armthorpe (G Park Doncaster)	30 42	15 38	Doncaster				Unit 1 spec built (15.7ha plot) and occupied by next. Further potential - Plot B of West Moor Park Development. 16.29 ha. Outline planning permission for max 641,943 sq.ft. Several illustrative masterplans (4 options) granted May 2021. Original application 15/03017/OUTM approved July 2017. Developer is GLP. Close to M18 J4. Subsequent RM application submitted 4th May 2021 for single unit of 601,761 sq.ft. As marketed on Build to Suit basis assumed no longer available.
Land off Hatfield Lane, Armthorpe (Gateway 4 M18)	12 74	12 74	Doncaster			Built	Local Plan identifies 12.61 ha at this site. Application 19/01371/FULM granted for B2/B8 development granted Nov 2019 and UC. 408964 sq.ft. Trebor Developments and Hillwood. Built and available now
Unity Regeneration Project (The DN7 Initiative)	428 37	65	Doncaster	15.2	1,254,450	OPP	Allocation in Local Plan (Policy 69). Min of 1015 homes, 33.6 ha of employment over plan period (and 66 ha over lifetime of development) with link road from J5 of M18. Outline planning permission 15/01300/OUTA. Developers Waystone and Hargreaves Land. Link Road opened Dec 2020. Unity

							Connect scheme being marketed. Large unit sold. 3 further units being marketed - 250,000 sq.ft, 250,000 sq.ft and 100,000 sq.ft plus some smaller units. Options for smaller units with 1 x 250k sq.ft also shown. Unity Link includes 15.2 ha of land
Safeguarded Cargo Area, Robin Hood Airport	44 04	33 03	Doncaster				Airport Masterplan 2018-35 identifies as Global Air Cargo Campus. Comprises Cargo North and Cargo South areas. Fall within Airport Operational Area, either side of the passenger terminal. Not available for general B8 use and will be specific related to airport specific growth.
Balby Carr Bank, Balby	11 25	11 25	Doncaster				Local Plan identifies 8.6 ha as available for development in the plan period. PDL within existing employment area, with access via White Rose Way to M18 J3. Site owned by Bridon International, who operate manufacturing facility. Appears ransom with no access to plots to south. Not considered available for strategic B8 development.
Site 2, Land East of Poplars Farm, Hurst Lane, Auckley	68 54	51 41	Doncaster				Allocation in Draft Local Plan. Identified for residential in Peel Aero Centre Doncaster Masterplan. Not considered deliverable
Site A - East of Bankwood Lane, Rossington	17 68	17 68	Doncaster				Extant allocation in Local Plan. Appears site used for industrial use and open storage (Tanks and Vessels Industries Ltd) who operate from the site. Delivery reliant on development of Bank Wood Lane Industrial

							Estate Link Road to West End Lane Roundabout which provides connection to M18 J3 (which was granted consent April 2020). Link road applicant is Eco Power Environmental. No evidence site to be marketed/promoted for strategic B8.
Junction 6 M18, Thorne North	73 63	73 63	Doncaster	74	3,600,000	Alloc	Local Plan Table 5 identifies this as an allocation with expectation that 51.5 ha developed within plan period to 2035. Planning application submitted for industrial development (B1c, B2, B8) of 74 ha of land in Aug 2016. Bramston (Thorne) Ltd identified as development partner in 2019. HE recommending condition requiring no more than 3.6 m sq.ft GIA of development and no more than 1.1m sq.ft B1c/B2 and monitoring measures re junction impact (May 2021). Assume consent will be granted shortly. Close to M18 J6.
Off Centenery Way/ Bawtry Road, Canklow	6 65	6 65	Rotherham				2018 Sites and Policies DPD Allocation E3. Site owned by London & Scandinavian Metallurgical Co Ltd who own adjacent industrial site. No planning application or evidence of developer involvement. Access would be required through their existing site. Poor access and questions over availability. Not considered capable of accommodating strategic B8 development.

Land to south of Aldwarke Lane - adjacent Yorkshire Water STW, Aldwarke	10 22	10 22	Rotherham				2018 Sites and Policies DPD Allocation E7 (10.53ha) identifies capacity as 5.11 ha. Google maps indicates site has since been built out.
Roundwood Colliery access off Aldwarke Lane, Aldwarke	6 16	6 16	Rotherham				2018 Sites and Policies DPD Allocation E9. Poor quality site adjoining steelworks. Location and shape of site unattractive for strategic B8 development.
Land within Aldwarke Stee Works (Corus) off Doncaster Road, Aldwarke	7 11	7 11	Rotherham				2018 Sites and Policies DPD Allocation E10. Forms part of existing steelworks site, owned by Sepcialist Steel UK Ltd. Owned by Liberty Steel and no evidence that land is marketed for other employment development.
Land off Bookers Way, Dinnington	6 95	5 9	Rotherham	5.9	250,000	Allocation	Allocated site (Site E13) to north of existing Bookers Way Industrial Estate. Owned by existing business (Safetykleen UK Ltd). 2.7 miles from M1 Junction 31. No evidence of developer involvement or planning application. Considered potential for longer-term delivery
Land at former Laycast works, Woodhouse Mill (Woodhouse Link)	9 33	7 1	Rotherham				Home Décor unit operational. Network Space granted planning permission for 112,900 sq.ft across 4 units varying from 15,800 - 48,900 sq.ft. Not to accommodate strategic B8 development.
North of Thurcroft Industrial Estate, Thurcroft	6 17	6 17	Rotherham				Extant allocation (E37) of undeveloped agricultural land to north of existing estate. Strategic access to site is moderate - to M18 J1 via Kingsforth Lane and

							Cumwell Lane which are narrow, local roads. Not commercially attractive for strategic B8.
EWS dismantled railway line, Wood Lane, Brinsworth	5 85	5 85	Rotherham				Allocation E35. Long narrow shape of site means incapable of accommodating Strategic B8.
Land off Cumwell Lane, Hellaby	15 98	15 89	Rotherham	15.89	550,000	Allocation	Allocation E24. Adjacent to M18 Junction 1. Owbed by Stretton Denman Ltd.
Land to west of Mansfield Road, Waleswood Vector 31	8 85	8 85	Rotherham				MU22 allocation for mixed-use development including B1 and B2. No provision for B8.
Land to the south of Monksbridge Road, Dinnington (31 East)	17 08	15 37	Rotherham				Allocation E14. Appears site built out - at least in part. Central part of the site being delivered for light industrial development - 31 East. No further land/sites being marketed.
Land off Europa Link, Sheffield Business Park	6 23	6 23	Rotherham				Allocated site (E36). Shown on Sheffield Business Park Masterplan as Phase 4. Has planning consent but with focus on units ranging 3,100 sq.ft to 59,200 sq.ft units. Will not meet strategic B8 needs.
Advanced Manufacturing Park, Waverley	58 92	12 88	Rotherham	12.9	325,000	OPP	Harworth Group development, off M1 J33. Masterplan indicates 3 larger units providing potential for 325,000 sq.ft. Understand focus of policy is on B1b/c and B2 use. Not targeted for strategic B8.
Off Waleswood Way (Vector 31)	20 82	17 7	Rotherham	16.1	555,000	Allocation	Local Plan allocation E32. Close to M1 J31. Vector 31 West application includes 7-9 smaller units of 12,500 - 75,000 sq.ft. Two separate freehold interests to east.

							Assumed potential for strategic B8 on western site. Developer Network 21. Agent Knight Frank
Smithywood, Cowley Hill, Chapelton (PLP Smithywood)	13 32	11 32	Sheffield				346,330 sq.ft unit speculatively developed and let to Advanced Supply Chain Group. Remaining plots not capable of accommodating strategic B8 development (too small).
Sheffield Business Park Phase 2	23 81	22 6	Sheffield				Covered as part of Advanced Manufacturing Park Waverley. Other parts of this development are not focused on strategic B8.
Outokumpu, Shepcote Lane (Bessemer Park, Sheffield)	19 53	17 58	Sheffield	10.3	428,070		Phase 1 development involved construction of 45k sq.ft and 134k sq.ft units on speculative basis. These units let to Athrex and IMT Power. Phase 2 will see 605,000 sq.ft constructed in 4 units- 83,237 sq.ft, 135,625 sq.ft, 94,175 sq.ft and 292,445 sq.ft.
Beeleywood, Claywheels Lane	9 79	4 9	Sheffield				2015 ELR says It is understood that much of the land identified for assessment has recently been developed (with occupiers including International Stone, Ballast Phoenix and Stone Face) with a parcel of greenfield land to the east the only plot which remains undeveloped (totalling 3.01ha). However, it is understood that this has been acquired by Amber Steel. As such, no land is currently available to the general market. Weak relationship to Strategic Road Network - not attractive large scale B8.

River Don District, Weedon Street	18 45	10 6	Sheffield				Urban/ city centre development opportunity not strategic B8
Alsing Road/ Riverside	5 54	5 54	Sheffield				Known as Vantage Riverside in ELR. RM planning consent granted in 2011 (11/00697/OUT). Scheme has been built out.
AMRC Campus, Land to the north west of Europa Link	18 49	10	Sheffield				Site being developed as advanced manufacturing innovation district. Will be home to Sheffield Royce Translation Centre, Laboratory for Verification and Validation, Factory 2050 and Boeing Sheffield. Focused on B2/ industrial requirements not strategic B8.
Sub Total SELA estimated area				384			14,438,000 sqft
ELNS area							
Castlewood Business Park		5	Ashfield District	5	205,815	PP	Also at Castlewood Business Park 2018/19, but not yet developed at the time of writing (planning application ref v/2018/0652) – warehouse 19,235 sqm over 5.0 ha
Boots Campus		2.5	Broxtowe			PP	18/00841/FUL – Full planning application – Construct medical technology innovation facility – Granted 26.04.19
Stanton Regeneration	85	50	Erewash	28 ⁴	1,188,770	Masterplan	The current policy allocates 10 ha of land for industrial and warehousing uses relating to the Stanton

⁴ Higher than allocation but seems a reasonable prospect of future delivery. 10 ha lower range

							Regeneration site. A significant proportion of the Stanton Local Plan allocation was sold to new owners in 2020. Masterplans show range of large units up to total 111,100 sqm (28 ha est at .4 ratio) https://newstantonpark.com/development/#masterplan
Teal Close	8.6	4.3	Gedling			PP	Application 2019/0615 indicates small units
Top Wighay Farm	8.6	6.5	Gedling			PP	2020/0050 - Outline planning application for mixed use development - - 14,501 sq. m. GIA of B8 uses – assumed that these are not strategic units given mixed use nature of site
Gedling Colliery/Chase Farm		2.45	Gedling			PP	Outline planning permission granted (July 2020, reference 2017/1571) for the erection of employment units (Class B1c/B2/B8 Use), Pub/Restaurant (Class A3/A4 Use) and Drive Thru (Class A3 Use), together with associated parking, servicing and landscaping. Area insufficient for large units considering mix
NCC1 Glaisdale Industrial Estate (2.93 ha)	42.6	2.93	Nottingham			PP	20/00855/PFUL3 – Full planning application – 2 units of 20,000 sqft. Site not suitable for strategic unit
NCC2 Blenheim Industrial Estate	40.8	7.05	Nottingham	7.1	303,432		Existing industrial area. Has large distribution units in adjacent plots therefore realistic that additional could come forward.
NCC6 Stanton Tip – Hempsill Vale	32	7.5	Nottingham				The site is allocated within the adopted Nottingham City Local Plan as a development site (Local Plan Policy RE7, site reference SR11) for a mixed-use development comprising of 350 dwellings, 5-10ha of

							industrial or warehousing units and small-scale retail. Not anticipated strategic units appropriate in mix.
NCC7 Canal Quarter – Island Site (7.02 ha) - The site is located within the	9.76	7.02	Nottingham				Outline planning was approved in July 2020 for the development of new homes, Grade A office space, a hotel, retail units and student accommodation with full planning approved for phase 1 of the development in November 2020
NCC16 Riverside/Lenton Lane (Boots/Abbeyfield Road - Boots Site)	14	TBC	Nottingham	9.2	356,813	PP	14/02038/POUT: It is proposed that parcels E13 (4.62ha, GFA 22,240 sqm)) will comprise use class B8 • E16 (4.61ha) comprising of storage space to the rear of Building D82 will comprise of use class B8 (GFA 11,107 sqm).
NCC17 Riverside/Lenton Lane (Abbeyfield Road - East of Beeston Canal) (6.77 ha of vacant land within the site boundaries	6.8	TBC	Nottingham	6.8	292,672	PP	18/01455/POUT - Outline application for the development of up to 46,556 sqm of B1, B2 and B8 industrial space, up to 12,115 sqm for a potential car showroom (use class Sui Generis) and with all matters reserved, except consideration of access – Granted – 02.12.19. Site layouts indicate large unit(s)
NCC19 Riverside/Lenton Lane (former Wilford Power Station)/Lenton Lane) (5.57 ha):	5.6	TBC	Nottingham				Office park, no developable area

NCC23 NG2 Business Park (2.72 ha):	15.7	2.7	Nottingham				The Local Plan Part 2 has identified these sites for the construction of approximately 13,000-15,000 sqm and 10,000-12,000 sqm of office space respectively.
East and West of Nottingham Road		20	Rushcliffe				14/01417/OUT B8 (Distribution) – 40,000 sqm. DAS 2018 layouts suggest strategic units not appropriate given proximity to residential and eaves height restriction
Land North of Bingham	15.5	1.6	Rushcliffe				This is a greenfield site set within a wider strategic allocation to the north of Bingham. The residential development is being implemented. planning permission for employment uses. 10/01962/OUT reads 1.6 hectare mixed use [for employment] site (B1, B2, B8 and car parking
Former RAF Newton	21.6	10.7	Rushcliffe				10/01962/OUT – site layout not conducive to strategic units. 10/02105/OUT – considered unlikely that strategic units would come forward on site of this nature.
East of Gamston North of Tollerton	24.7	12	Rushcliffe				20/03244/OUT - Outline Planning Application – accompanying masterplan framework – level of integration between employment and residential suggests strategic B8 unlikely
Castlewood business Park		4.9	Ashfield	4.9	217,274	PP	2018/0652 - B8 unit 20,306 sqm GEA, 4.9 ha
South West of Oakham Business Park			Ashfield	1.86	102,185	PP	2019/0416 single unit 9,550 sqm on 1.86

Harrier Park, Hucknall	27	20	Ashfield	10	430,400	Allocation	No application for remainder. Potential for strategic units. Assumed area large units, note resi application on 5 ha
Boughton Industrial Estate	31.5	3.6	Newark	7.1	305,584	Allocation / PP	11/00768/FULM Erection of an extension to B8 warehouse 13,000 sqm (appears unimplemented, equi to 3.3 ha). "The employment designation (OB/E/3) within the south of the site remains undeveloped and comprises of 3.78 ha." Prospect of further delivery.
A17 Winthorpe Nottinghamshire		9.9	Newark				16/01796/FULM - Vehicle/plant servicing and repair workshop, storage, office, sales etc. Assume not strategic B8.
Thoresby Colliery 16		8	Newark				"6/02173/OUTM – Mix of office, light industrial and general industrial units" assumed not strategic B8
Land N and S of Cross Lane			Newark				Allocation / permission for B1 Business development, not B8.
Staunton Works Alverton Road Staunton	6		Newark				Change of use to B8. Poor connection to strategic network, not strategic.
NSDC3 Land off Beacon Hill Road (G Park)	96.1	23.6	Newark	16	759,465	Allocation	"This is currently on the market for build-to-suit logistics/warehouse up to 70,978 sqm and marketed as G-Park." Reasonable prospect of coming forward. GLP report 39 acres (16 ha)
NSDC4 British Sugar	85	5	Newark			Allocation	Specialist manufacturing expected
NSDC7 Land North and South of Cross Lane (7.38 ha)	7.8	7.4	Newark			Allocation	The site is allocated as a Strategic Site (NAP 2C Land around Fernwood and Core Strategy Spatial Policy 5); it is identified for Use Class E office development .

NSDC12 Crew Lane Industrial Area, Southwell (4.65 ha)	12.6	4.7	Newark			Allocation	Expected to be appropriate for medium size general industrial.
NSDC22 Land west of the A1 on Stephenson Way (NUA/E/2) (7.56 h)	9.3	7.6	Newark	5	215,200	Allocation	Area shape partially comprised (triangle) but potential for strategic B8 given adjacent uses and access. 5ha assumed
NSDC23 Land south of Newark	48.8	43.9	Newark	25	1,070,000	Allocation / PP	14/01978/OUTM - 10/01586/OUTM: Description of development indicates c100,000 sqm or 25 ha storage and distribution. Masterplan suggests large units.
NSDC24 Land around Fernwood (13.49 ha)	14.2	13.5	Newark			Allocation	The site is allocated as a Strategic Site (Land around Fernwood – NAP 2C) and Spatial Policy 5 (Delivering the Strategy) in the Core Strategy, 2019), it is identified for Use Class E office development . 10/SCR/00001 - Screening opinion request for mixed use & residential development. This relates to this site and the site to the south.
NSDC26 Former Clipstone Colliery (10.8 ha)	27.6	10.8	Newark			Allocation	12 hectares of employment provision. Nature of mixed use and poorer network connectivity suggest strategic B8 unlikely.
Sub Total ELNS estimated area				121 ha			5,212,000 sqft
PMA Total ELNS estimated area				725			27,130,000 sqft

