Strategic Employment Land Appraisal
Summary Report

Sheffield City Region

May 2020

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1.0 **Introduction**

1.1 This document has been produced by Lichfields on behalf of the Sheffield City Region Mayoral Combined Authority (MCA). It provides a Summary of the Joint Sheffield City Region Strategic Employment Land Appraisal (SELA).

1.2 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** (Figure 1.1).

Figure 1.1 The Sheffield City Region
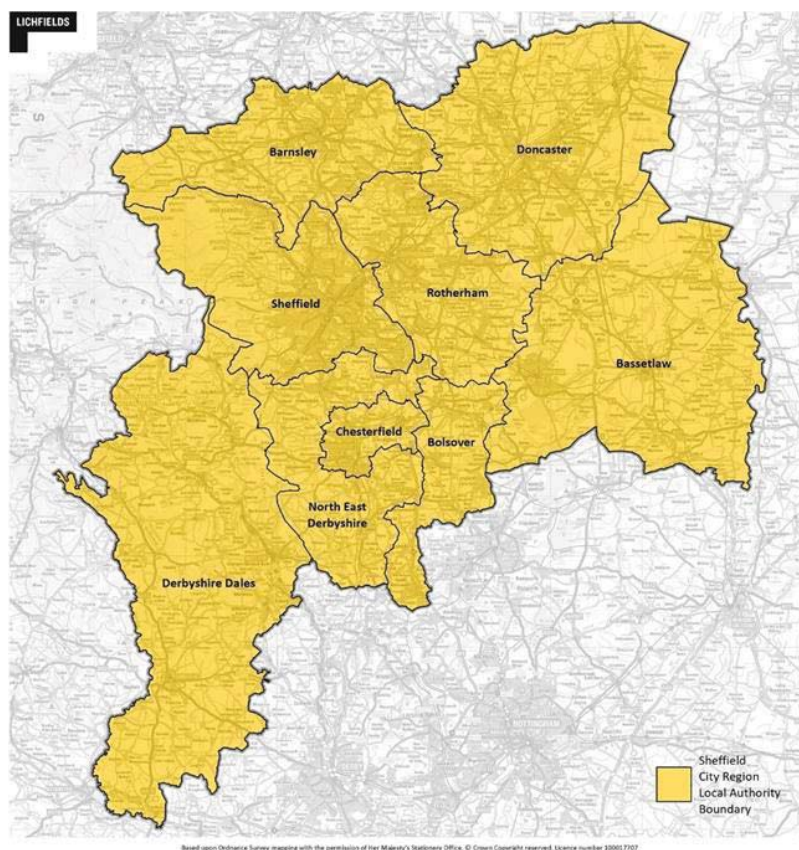
Source: Lichfields

1.3 It should be noted that this work started in early 2019, and therefore relied on the existing SCR SEP as the basis for identifying the growth areas, strategic positions, and the SCR geography (nine districts). Since then, 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. Therefore, any recommendations affecting SY will be for the SCR MCA/LEP and the four South Yorkshire districts to consider. Outside South Yorkshire, it will be for the five LPAs within the D2N2 LEP area to consider.

1.4 The study also preceded the production of a new draft SCR strategy (which is currently being consulted on). Where possible, reference has been made to the new Strategic Economic Plan [SEP], such as the new Growth Innovation Cluster Areas.

1.5   The study provides a high-level appraisal of strategic employment land supply and draws together existing evidence against the economic priorities of the MCA. It is designed to assist in helping to shape SCR's collaborative work with local districts, as well as inform the decisions of individual local planning authorities and Statement(s) of Common Ground in Plan-making. The SELA has informed the development of the SCR Local Enterprise Partnership's new Strategic Economic Plan [SEP].

1.6   At a local level, the study provides an up-to-date and comprehensive economic evidence to inform the 9 SCR authorities' judgments about the need for, and relative importance of, the strategic employment land in their areas, particularly in the face of added pressure for release to other uses. The study has been prepared in the context of requirements set out in the revised Framework (February 2019) and updated Planning Practice Guidance[1] [the Practice Guidance], with regards to planning for economic development needs.

Scope

1.7   The purpose of the SELA is to bring together existing evidence in each of the 9 SCR districts to create a joint economic evidence base on the strategic employment land supply for the SCR. It can be read to provide a better understanding of the differing qualities of the strategic employment land offer in the City Region as well as its strategic fit against the existing SEP.

1.8   The focus of the study is on B-Class employment land and floorspace, specifically:

- **B1a/b Business** (offices, research & development);
- **B1c/B2 Light / General Industrial** (factories and workshops); and,
- **B8 Storage or Distribution** (warehousing and distribution).

1.9   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. This shortlist was shared with the LPAs and further refinements were then made to either delete sites or introduce additional sites. The main reason for the deletion of sites was where LPAs found that they were no longer available for employment use; however, some were excluded where respective LPAs advised that, despite being above the 5.0 ha threshold, they were not deemed to be of strategic importance. Similarly, some smaller sites were added to the shortlist which had been excluding during the sieving exercise but were subsequently deemed to be necessary to include in the study, and others were added which were initially excluded from the LPA's data sets. In total, 153 strategic sites were assessed.

1.10   A strategic priority of the SCR is to provide inclusive growth and progression opportunities for all, enabling individuals and employers to reach their potential, drive productivity and contribute to the economic success of the region. This aim is typically met through the enhancement of skills and training opportunities for the resident population; however, there is also a spatial element to improving inclusivity in relation to where strategic employment sites are located relative to areas of deprivation. An important element of the study therefore involved plotting each of the strategic sites assessed across the City Region on a base layer of the Indices of Multiple Deprivation [IMD] (2015) to illustrate how the strategic employment sites are distributed relative to areas of deprivation.

1.11   To ensure it reflects local characteristics and issues, consultation was undertaken with a range of stakeholders including commercial agents, local Chambers of Commerce and other business organisations.

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[1]MHCLG (February 2019): Planning Practice Guidance: Housing and economic needs assessment

1.12   The key project objectives are to:

- Bring together the findings from existing Employment Land Reviews [ELRs], economic development assessments and similar existing evidence across local planning authorities in the SCR area, identifying sites and summarising this to set out the totality of employment land supply from 2020 to 2040 and its spatial distribution (reflecting the time horizon being set through the SEP review);

- At a high level, appraise the supply of current employment land alongside the industrial sectors and economic priorities in SCR. This work focuses on utilising knowledge of current market conditions and forecasts, alongside an understanding of the economic ambitions set in the SEP, rather than individual site visits;

- Identify strategic employment sites and areas which offer the greatest potential to attract higher value jobs or jobs in high growth sectors; and,

- Identify whether any current areas of employment land supply are surplus, or may be deficient, to the meet the needs of the economy in the future.

1.13   Ultimately, the SELA report provides a strategic reference point for future strategy development in terms of both spatial planning and wider economic development, for use by the SCR Local Enterprise Partnership (LEP)/Mayoral Combined Authority (MCA) and individual planning authorities as well as informing development of a new Strategic Economic Plan for the Sheffield City Region. It will also inform cooperation on economic growth and employment between local planning authorities in the SCR, providing a basis for any Statement(s) of Common Ground.

1.14   This Report provides a Summary of the key points emerging from the main SELA document.

2.0   **SCR Evidence Base Review**

2.1   A review of the economic evidence base documents for each of the 9 districts in the SCR was undertaken (along with the adopted development plan documents for each LPA) to generate an indicative employment land supply and demand balance for the SCR. The employment land supply and demand analysis used the most up to date data within each of the LPA's evidence base as summarised in Table 2.1 (overleaf).

2.2   As might be expected, given that many of the documents were carried out at different points over the past five years or so (with some stretching back further), it is not surprising that the timeframes are on occasion, inconsistent. In general, the Local Plans and ELRs planned for anywhere up to 2032 to 2035. This however, is considered to represent a reasonable level of planning alignment.

2.3   In terms of the preferred demand forecasting scenarios, the econometric modelling used in each district varies, ranging from Experian's REM forecasting, Cambridge Econometrics and Oxford Economics, often with different timeframes.

2.4   Employment densities also vary depending on the ELR – in particular, office floorspace densities range from 1 job per 9.6 sqm in Bassetlaw to 19 sqm in Barnsley; and from 50 sqm to 100 sqm for B8 uses in different Districts (the wide range is due to some LPAs separating out high bay from low bay warehousing). This could lead to different requirements in different districts that had otherwise followed a very similar methodological approach to their modelling.

2.5   Every district identified advanced manufacturing as a key growth sector, whilst the majority also identified logistics and creative industries as key sectors. In addition to these, Food and Drink was identified in both Derbyshire Dales and NE Derbyshire as key sectors; Construction, in Barnsley, Bolsover and NE Derbyshire; and Healthcare and Biotechnologies in Doncaster, Sheffield and Rotherham.

2.6   Given the differences in data available for each LPA; the age of the assessments; the methods of forecasting future needs; and the period over which those needs are forecasted, it is not possible to provide a wholly accurate and consistent representation of the current employment land needs and supply for the SCR as a whole. However, there do not appear to be any districts that have ELR methodologies or targets that are significantly out of line with the rest, and it is considered that the data summarised overleaf represents a reasonable overview of the future supply (and potential shortfalls/oversupply) across the City Region based on the current evidence base. In the Table, the data highlighted in bold represents the most up-to-date economic evidence base documents for that particular district.

2.7   The employment land needs and supply for each LPA have been taken from the most up to date evidence available, which may be an ELR or an adopted Local Plan, as well as taking into account feedback from officers at the respective LPAs where necessary. Where a Local Plan has reached Publication Draft stage, this has been used to inform the supply and demand balance if it post-dates the authority's ELR documents.

2.8   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. Figure 2.1 provides a summary of each LPA's existing employment land supply in comparison to the demand.

Figure 2.1 Employment Land Supply vs. Demand across the Sheffield City Region (in hectares)
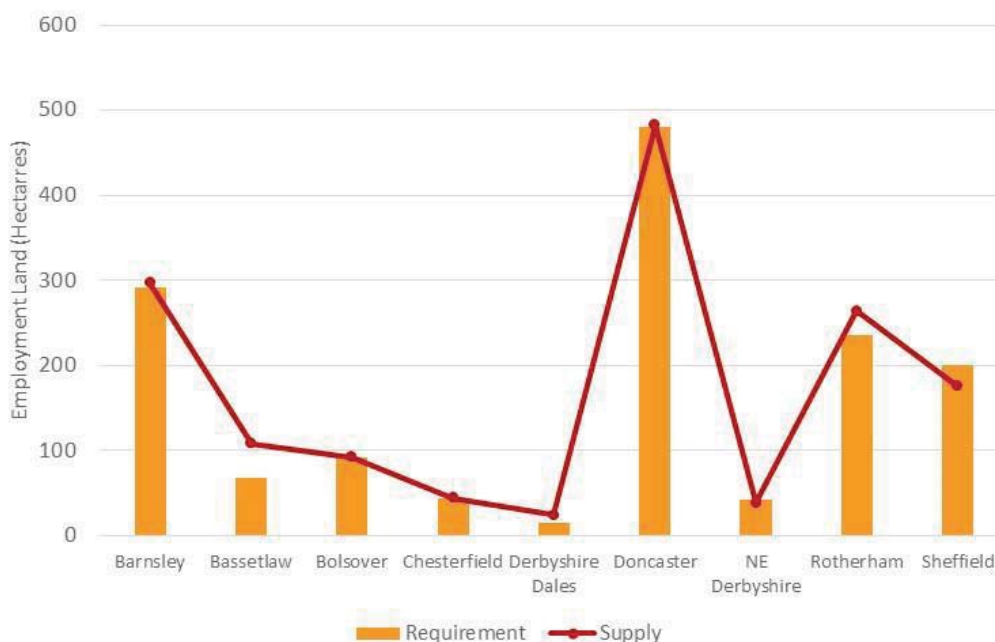
Source: Lichfields' analysis / Various ELRs and Local Plans

2.9   Most SCR LPAs have a surplus of employment land compared to their 'upper end' forecasted needs (i.e. if a range is given there is still a surplus compared to the highest figure given in the range). North East Derbyshire and Sheffield are the only authorities which have a shortfall, of 4 ha and 25 ha respectively. In the case of Sheffield City, whilst the Joint ELR recommended that between 135 and 195 ha should be allocated, the preferred 180 ha requirement is based on the LPA's feedback in line with their emerging Local Plan and falls within the upper end of the recommended land requirement. At the time of this report, a new ELR is currently underway for Sheffield and therefore the employment land supply may change after the completion of this report.

Table 2.1 SCR ELR and Local Plan Employment Supply and Demand

LPA	ELR Date and Period	ELR Need (ha)	ELR Existing Employment Land	ELR Potential Future Supply	ELR Key Sectors	Local Plan Status and Period	Local Plan Need and Supply	Surplus / Deficit
Barnsley	Published – Dec 2016 2013 - 2033	291.2	121.8	307.1	Advanced Manufacturing, Logistics, Construction and the Visitor Economy and enabling sectors as business services, creative and digital industries and low carbon.	**Adopted – Jan 2019 2014 – 2033**	**Need – 291 Supply - 297**	+6 ha
Bassetlaw	Published – Jan 2019 2018 - 2035	63	399	399	Manufacturing, transport and storage	Adopted – 2011 2011 – 2028 **Draft Bassetlaw Local Plan – January 2020**	**Need – 68 Supply - 108**	**+40 ha**

Bolsover	Published – 2018 (need) /2015 (sites) 2014 - 2033	112	205.6	110.1	Transport and storage, accommodation and food service activities, real estate and human health and social work activities, manufacturing, construction, information and communications and energy and water	**Examination – March 2019** **2018 - 2033**	**Need – 92** **Supply - 92**	0 ha
Chesterfield	Published – 2018 (need) /2008 (sites) 2015 - 2033	44	92	64	Transport and storage, financial and business services sector and education and health sectors	**Publication Draft – Dec 2018** **2016 – 2033**	**Need – 44** **Supply - 44**	0 ha
Derbyshire Dales	Published – 2015 (need) /2016 (sites) 2015 - 2033	15	7.8	8.8	Visitor economy, food and drink manufacturing and agriculture and mining, professional, scientific and professional sector	**Adopted – Dec 2017** **2013 - 2033**	**Need – 15** **Supply - 24**	+9 ha
Doncaster	Published – March 2020 (need) / Feb 2018 (sites) 2015 - 2032	481	261	261	Rail, logistics, digital and creative, health, sustainability/zero carbon and the high education sectors	**Publication Draft – June 2019** **2015 - 2035**	**Need – 481** **Supply - 482**	+ 1 ha
North East Derbyshire	Published – Aug 2017 (need) / Dec 2017 (sites) 2015 - 2034	41	22	91	Digital and Creative Industries; Advanced Manufacturing; Food and Drink; Construction and Environmental Industries and Health and Social Care	**Examination – Nov 2018** **2014 - 2034**	**Need - 42.7 ha** **Supply – 38.4 ha**	-4.3 ha
Rotherham	**Published – Oct 2015** **2015 - 2031**	**235**	**264**	**264**	Manufacturing, health, retail, business services and education	Adopted – 2014 2013 - 2028	Need – 235ha Supply - 264ha	+ 29 ha
Sheffield	**Published – Oct 2015** **2015 - 2031**	**200**	**175**	**175**	Advanced manufacturing, financial/professional services, ICT, Creative Industries and Publishing and Media, Utilities and Environmental Technologies and Healthcare and Biotechnology.	Adopted – 2009 2008 – 2026 Emerging Local Plan 2018 - 2035	Need – 522ha Supply - 305.5ha **Need - 200 ha** **Supply – 175 ha**	- 25 ha

3.0 Economic Growth Drivers

3.1   The SELA reviewed the key economic and market indicators to establish the baseline position and understand the economic growth ambitions for the City Region. This will help inform the new Strategic Economic Plan that the SCR is currently producing. The drivers identified will also help to inform the decisions of individual local planning authorities and Statements of Common Ground.

3.2   The SCR's original 2014 SEP set out a focused economic plan for growth in the City Region over the period 2015-2025. Ambitions included boosting the private sector to help create 70,000 new jobs and 6,000 new businesses. Another key ambition was to drive growth in economic output across the SCR economy by £3 billion.

3.3   The SELA analysis shows that the SEP jobs growth target of 70,000 jobs remains is broadly on track, although the Experian REM expects this to level off over the next few years due in part to the Brexit and COVID 19 uncertainties. Over the 10 years to 2023/24, the underlying REM baseline projection indicated job growth of around 23,000; the updated REM baseline uplifts this by 36,230, to 59,230. As a result, this baseline position is only 10,770 FTE jobs below the aspirational 70,000 net job growth in the SCR.

Figure 3.1 SEP Underlying Growth vs. Reality
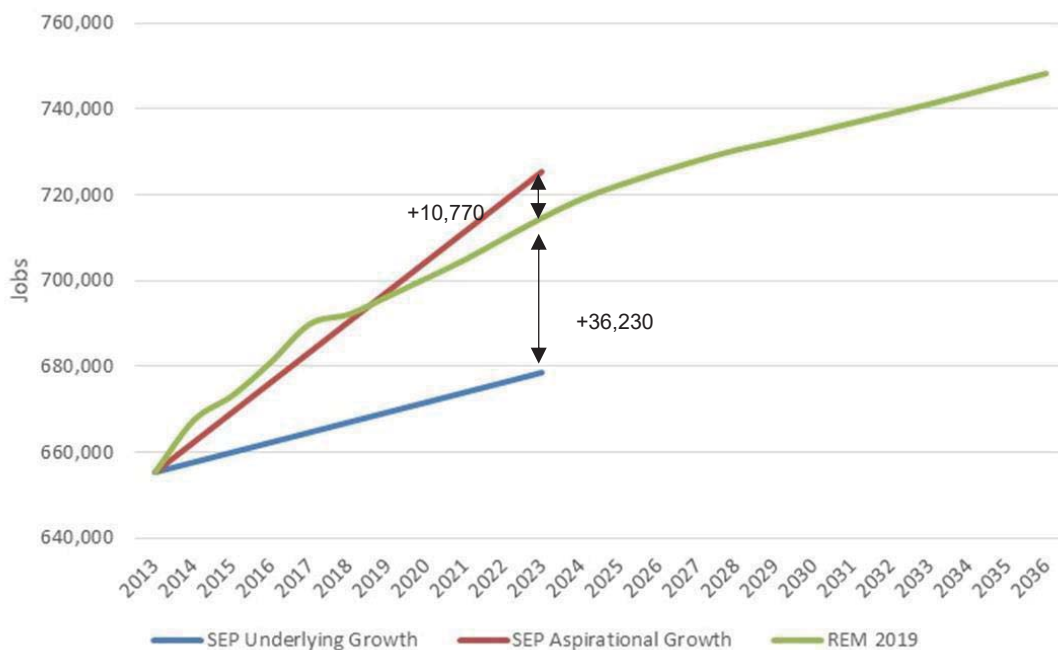
Source: Lichfields' analysis / REM 2019

3.4   However, it is the nature of this employment growth that may be of concern. Whilst there was an overall job target of 70,000, the SCR had a requirement that 30,000 of these would be higher skilled jobs. This has not necessarily been the case. There has been a very high level of actual growth in the Health sector (which includes social care), which is expected to continue to grow by 14,240 to 2023. Construction and Education have also been growing at far higher rates than was anticipated in the SCR. In addition, and far from declining by c.6,500 jobs, sectors that might be considered medium-Low Tech Manufacturing actually grew by 2,120 FTE jobs.

3.5   The new Experian REM projections forecast a slackening off of growth post 2018, although this is still reasonable to 2036 with a net FTE job growth of 56,300 and a CAGR of 0.43%.

Figure 3.2 Sheffield City Region FTE Job Growth 1998-2036
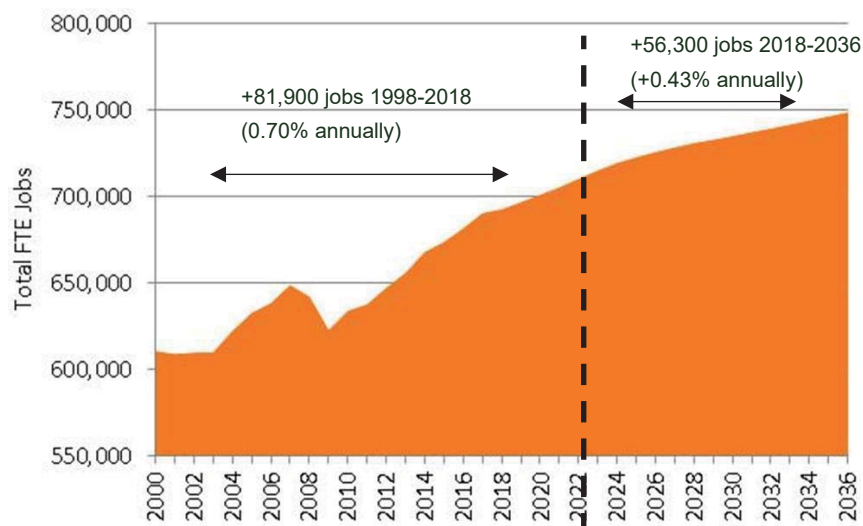
Source: Experian REM 2019

3.6   Growth is projected to be reasonably evenly distributed across the 9 SCR authorities over the next 18 years, with all districts seeing a growth in FTE jobs of at least 5% (North East Derbyshire), up to 9.9% (Sheffield City).

3.7   In general, the SELA concludes that it is appropriate to maintain the 70,000 jobs growth as a target, but this may be achieved over a slightly longer time period than initially envisaged which may be particularly the case due to Covid 19 impacts.

3.8   Table 3.1 and Table 3.2 summarise the economic growth potential of different individual sectors based on jobs for each of the 9 districts within the Sheffield City Region, based on current representation and growth potential identified in the latest Experian REM projections (supplemented by stakeholder discussions). The Tables are both an effectively "policy off" analysis and represent Lichfields' own interpretation of the strength of each sector by District based on:

         a   a Location Quotients [LQ] analysis in 2018 for the current representation;

         b   the combination of the LQ analysis in 2036 and the latest Experian REM job growth projections for the future representation.

3.9   L (red) in Table 3.1 indicates where a particular district currently has a 'Low' representation in that particular sector from an employment perspective, given the size of the local economy. As the proportion of the local economy reliant on a particular industrial sector increases, then so too does the rating in the table, from Low/Medium [L/M] to Medium [M], Medium/Strong [M/S] and finally, where the local economy is significantly over-represented in a particular sector, to Strong [S].

3.10   All of the districts have sectors where they are currently strong, from General Manufacturing in Barnsley, Bassetlaw, NE Derbyshire, Rotherham and Sheffield, through to Leisure and Recreation in Derbyshire Dales. It also indicates that the City Region is generally weak in white collar sectors, notably Financial and Professional Services, with only Sheffield City showing a strong representation in this office-based sector at present.

Table 3.1 Different industrial sectors for all SCR districts – CURRENT REPRESENTATION (POLICY OFF)

	Barnsley	Bassetlaw	Bolsover	Chesterfield	Derbyshire Dales	Doncaster	NE Derbyshire	Rotherham	Sheffield
Financial / Professional Services	L/M	L	L	L/M	L	L/M	L	L/M	S
Wholesale, Transport and Logistics	M	M/S	S	M	L	S	L	M/S	L/M
General Manufacturing	S	S	M	M	M	L/M	S	S	S
Advanced Manufacturing	L/M	L/M	L/M	L/M	L/M	M	L/M	S	S
CDI	L/M	L	M	M/S	L/M	L	L/M	L	M/S
Utilities / Environmental Technologies	L	M/S	M	L	L	M	L	M/S	M
Healthcare / Biotechnology	M/S	M/S	L	S	L	S	L/M	M	S
Construction	M/S	M	M/S	M	M/S	M/S	S	M/S	M
Education	M	L/M	L/M	M	L	M	M	M	S
Leisure and Recreation	M	L	L	L	S	M	L/M	L/M	M

3.11   Table 3.2 follows the same principles, albeit greater weight is attached to prospective economic growth prospects of a particular sector, based on the latest Experian REM forecasts. As such, no allowance has been made for a particular district's aspirations unless these align closely with the REM growth forecasts. Furthermore, it does not take into account any policy aspirations, nor the results of any qualitative analysis or other data sources such as recent Business Surveys. It does not supersede any extant ELR B-Class requirements for any of the SCR districts, which generally involve more detailed analysis than can be achieved by a single econometric model without the contextual qualitative analysis to support the conclusions. It instead provides a very broad indication of the current state of play ahead of more detailed analyses of the demand/supply balance.

3.12   It suggests that certain sectors, such as Utilities and General Manufacturing, are likely to weaken almost across the board, whilst others are likely to see significant growth, such as distribution and leisure.

Table 3.2 Economic growth potential of different industrial sectors for all SCR districts – FUTURE GROWTH POTENTIAL (POLICY OFF)

	Barnsley	Bassetlaw	Bolsover	Chesterfield	Derbyshire Dales	Doncaster	NE Derbyshire	Rotherham	Sheffield
Financial / Professional Services	M	L	L	L/M	L	L/M	L	L/M	S
Wholesale, Transport and Logistics	M	S	S	L/M	L	S	L/M	M	S
General Manufacturing	L	L	L	L	L	L	L	L	L
Advanced Manufacturing	L/M	L/M	L/M	L/M	L/M	M	L/M	S	M/S
CDI	L	L	M	M	L	L	M	L/M	M/S
Utilities / Environmental Technologies	L	M	L	L	L	L	L	L	M
Healthcare / Biotechnology	M	M/S	L	M/S	L	S	L	M/S	S
Construction	L	M	M	L/M	L/M	S	L	M/S	S
Education	M	L/M	L	L	L	L/M	L	S	S
Leisure	S	L	L	M	M/S	S	L	S	S

Source: Lichfields Analysis / Experian REM

4.0   Defining the FEMA

4.1   A broad overview of the Sheffield City Region [SCR] and its likely position within a wider Functional Economic Market Area [FEMA] has been undertaken and provides an up-to-date analysis of the extent of the FEMA in accordance with the guidance contained within the 2019 PPG, using the latest data on migration and commuting levels.

4.2   The identification of a SCR strategic FEMA would sit above Local Plan defined FEMAs, and this exercise is not intended to replace or alter the FEMAs which have been identified locally. Instead, the identification of a strategic FEMA would enable the SCR to offer the optimum supply of land to address large scale or strategic inward investment requirements that would otherwise be above and beyond the indigenous needs of one district.

4.3   Travel to Work Analysis [TTWAs] provide a good indication of what labour market a location or local authority is in and how labour market areas are split across the UK. The ONS 2011 TTWAs were developed to approximate self-contained labour market areas i.e. areas where most people both live and work and therefore relatively few commuters cross a TTWA boundary.

Figure 4.1 Sheffield Travel to Work Areas
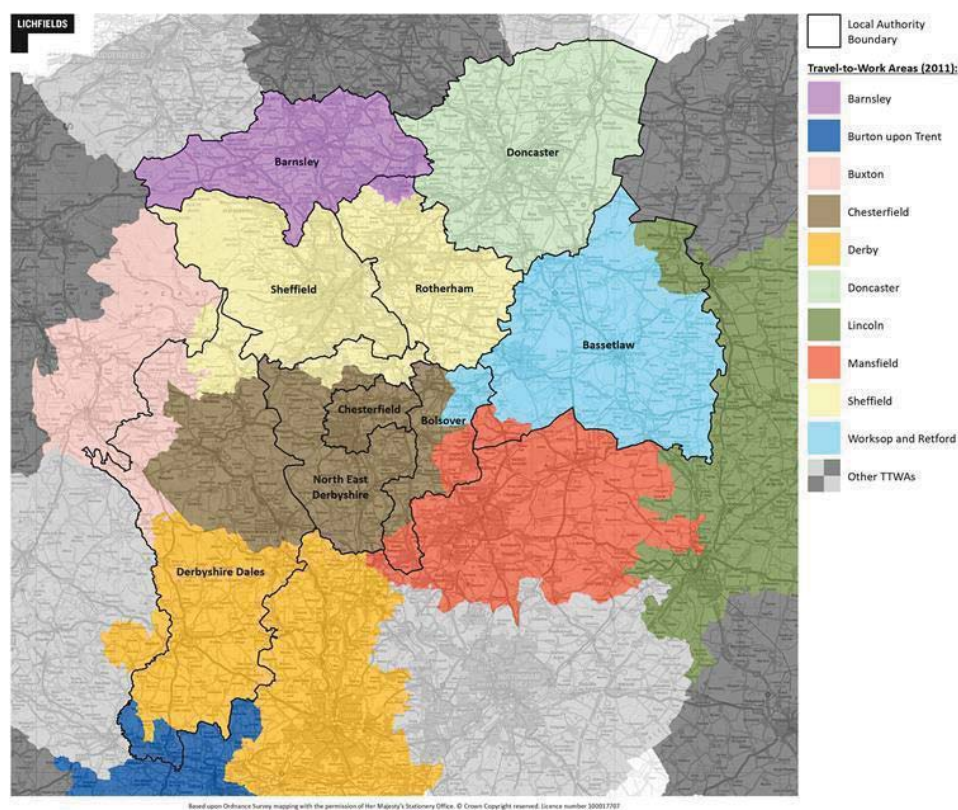
Source: ONS Census 20111/Lichfields' Analysis

4.4   The ONS's own TTWA analysis effectively indicates that **Barnsley, Doncaster and Bassetlaw are broadly self-contained districts** from a commuting perspective. This is supported by Lichfields' own analysis of 2011 Census data. Furthermore, **Sheffield/Rotherham comprises another TTWA**, with some moderate overlap with parts of North East Derbyshire and the Derbyshire Dales, which again aligns with the Lichfields analysis and the ELR evidence. The **Chesterfield TTWA includes both its namesake**

**district as well as much of North East Derbyshire and parts of Derbyshire Dales and Bolsover**.

4.5 Beyond these SCR TTWAs, it is clear that from a labour market perspective, **Derbyshire Dales is pulled in several different directions**, towards Buxton, Derby and even Burton on Trent. Bolsover is also split down the middle between Mansfield, Chesterfield and Worksop/Retford, whilst parts of Bassetlaw also extend towards Lincoln and Mansfield.

4.6 Given this highly complex pattern it is reasonable to maintain existing FEMAs at a local level, although looking strategically, it makes sense to consider land requirements across the Sheffield City Region. This is particularly relevant for large scale logistics requirements, which are often highly footloose and based around Motorway and strategic road junctions serving a 'greater than local' catchment. This aligns with the recently updated PPG[2] advice on the topic:

- *"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).*

- *Strategic facilities serving national or regional markets are likely to require significant amounts of land, good access to strategic transport networks, sufficient power capacity and access to appropriately skilled local labour. Where a need for such facilities may exist, strategic policy-making authorities should collaborate with other authorities, infrastructure providers and other interests to identify the scale of need across the relevant market areas."*

4.7 It is therefore appropriate to test whether some of the strategic B8 logistics requirements could be accommodated in the most accessible parts of the SCR, even if it would outstrip the indigenous needs of any particular district in isolation. It is recommended that the SCR districts work together to ensure B8 requirements are accommodated in the most accessible areas. This may also help safeguard other sites for higher value industrial uses.

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[2] PPG ID: 2a-031-20190722

5.0 Employment Land Supply and Growth Areas

5.1   A high-level appraisal of strategic employment sites across the SCR was undertaken with a particular focus on strategic sites of 5 ha or more which are predominantly located within key growth areas that have been identified across the region. These comprise **Dearne Valley and J36; Doncaster Sheffield Airport; Markham Vale; A61 Corridor; Sheffield City Centre; Advanced Manufacturing Innovation District; and DN7/Unity** as shown in Figure 5.1.

Figure 5.1 Sheffield City Region Priority Growth Areas
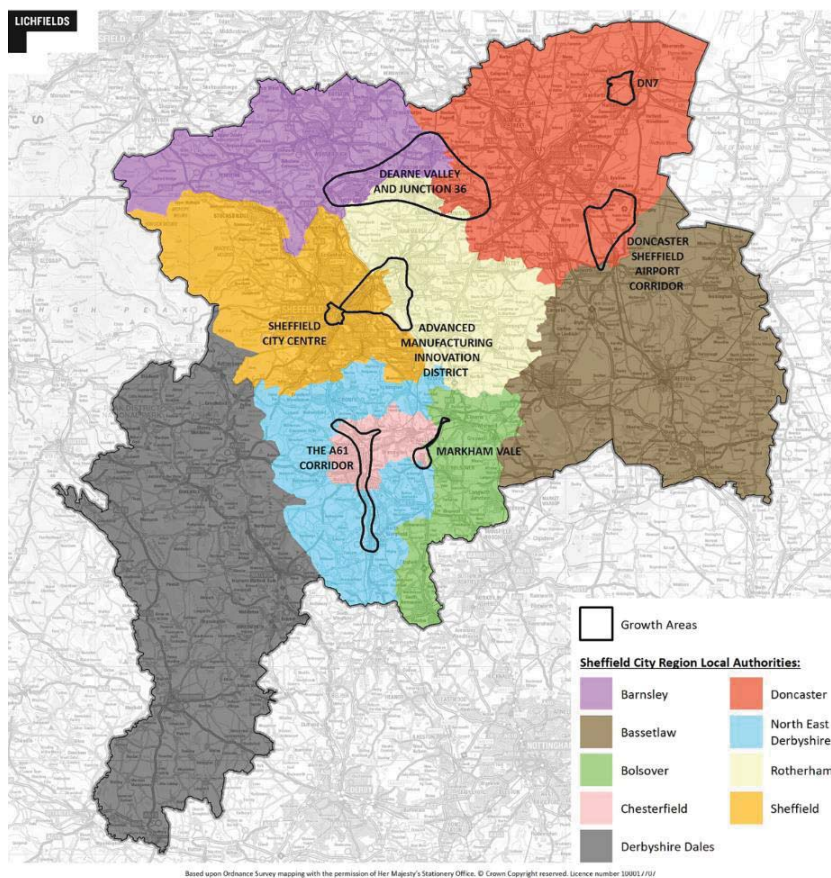
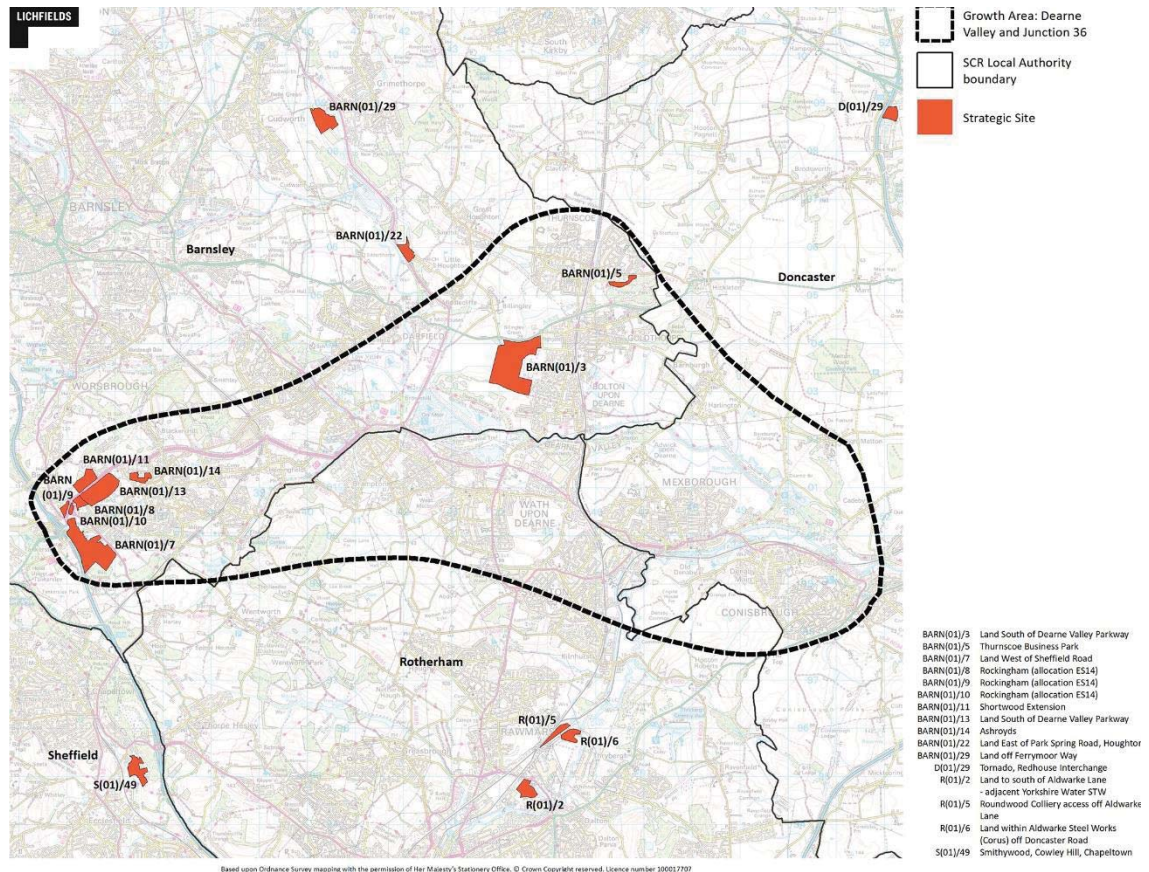Source: Lichfields

Growth Areas

5.2   A summary of each Growth Area, as defined in the SCR Integrated Infrastructure Plan (IIP) 2016, and the strategic sites in each area is provided below.

Dearne Valley and Junction 36 Strategic Sites

5.3   The Dearne Valley and Junction 36 Growth Area covers parts of three separate local authorities (Barnsley, Doncaster and Rotherham). However, all of the strategic employment sites within this Growth Area are located within Barnsley. The Dearne Valley has a diverse economy with a range of sectors represented, including advanced manufacturing, B2 and B8 operators. The vision and target sectors identified by the SCR for this Growth Area are for an **'eco-vision'**

with advanced logistics uses. Further consideration to the continued focus on the eco-vision will be given by the SCR going forward; however, it is considered that the allocation of employment sites within the Dearne Valley will help meet some specific principles of the Eco-Vision, including job prospects for local people and increasing the potential for attracting new businesses to the area which could specialise in environmental technologies.

Figure 5.2 Strategic Sites within the Dearne Valley and Junction 36 Growth Area
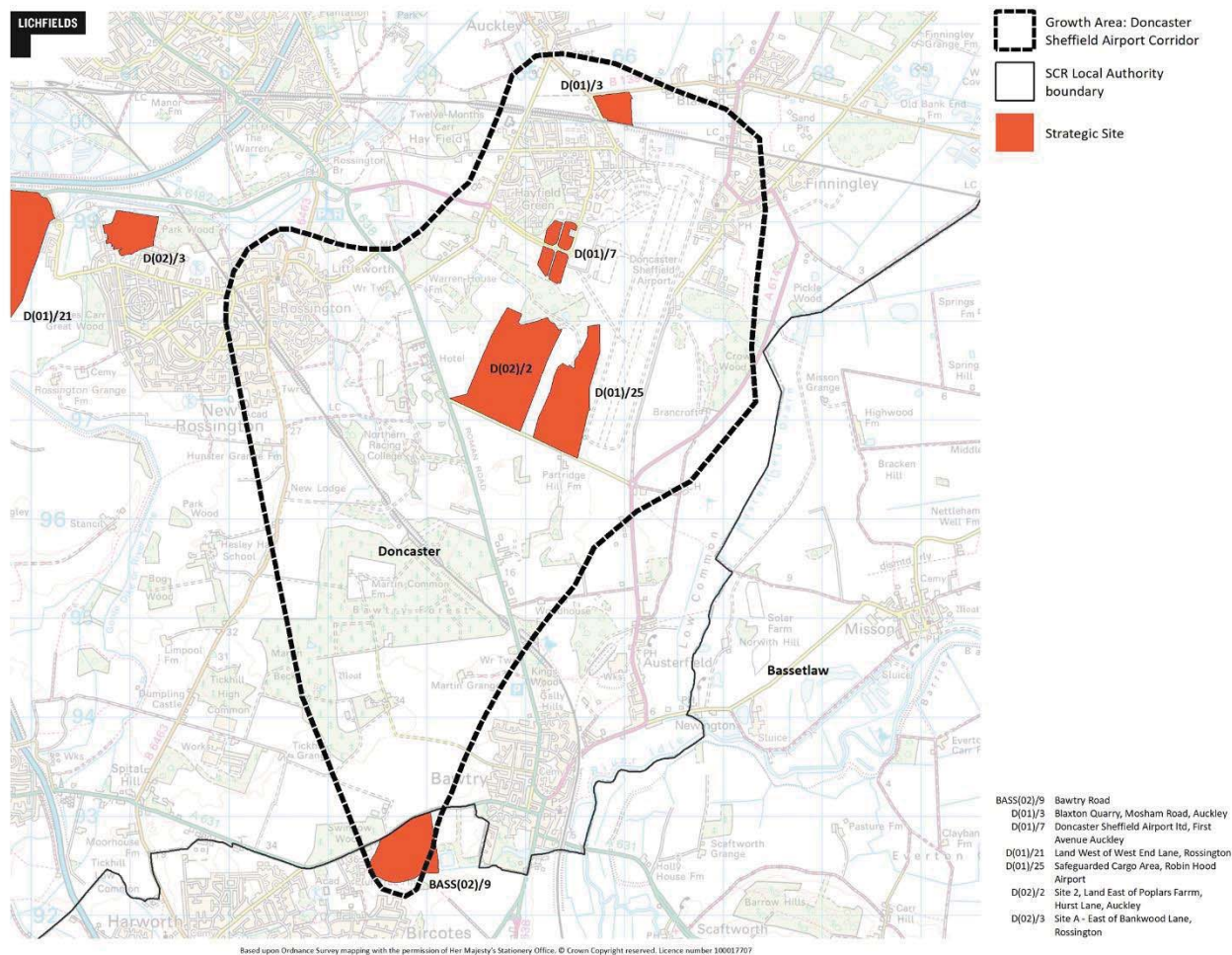

Source: Lichfields

Doncaster Sheffield Airport Corridor Strategic Sites

5.4 This Growth Area includes Doncaster Sheffield Airport and surrounding land, as well as a large area of land to the west of the A638 including residential land at Rossington. Over 90% of the growth area falls within Doncaster, with the remainder in Bassetlaw at the location of the strategic site on Bawtry Road. The **target sectors are logistics, engineering and associated aviation activities**.

5.5 The sites which are proposed for employment development in the emerging Doncaster Local Plan around the airport site appear to represent excellent locations for a combination of B1, B2 and B8 development. The proximity of a number of the sites to the airport and the improved road connections following the completion of the Great Yorkshire Way is likely to attract logistics and aviation businesses in line with the target sectors for the Growth Area.

Figure 5.3 Strategic Sites within Doncaster Sheffield Airport Growth Area
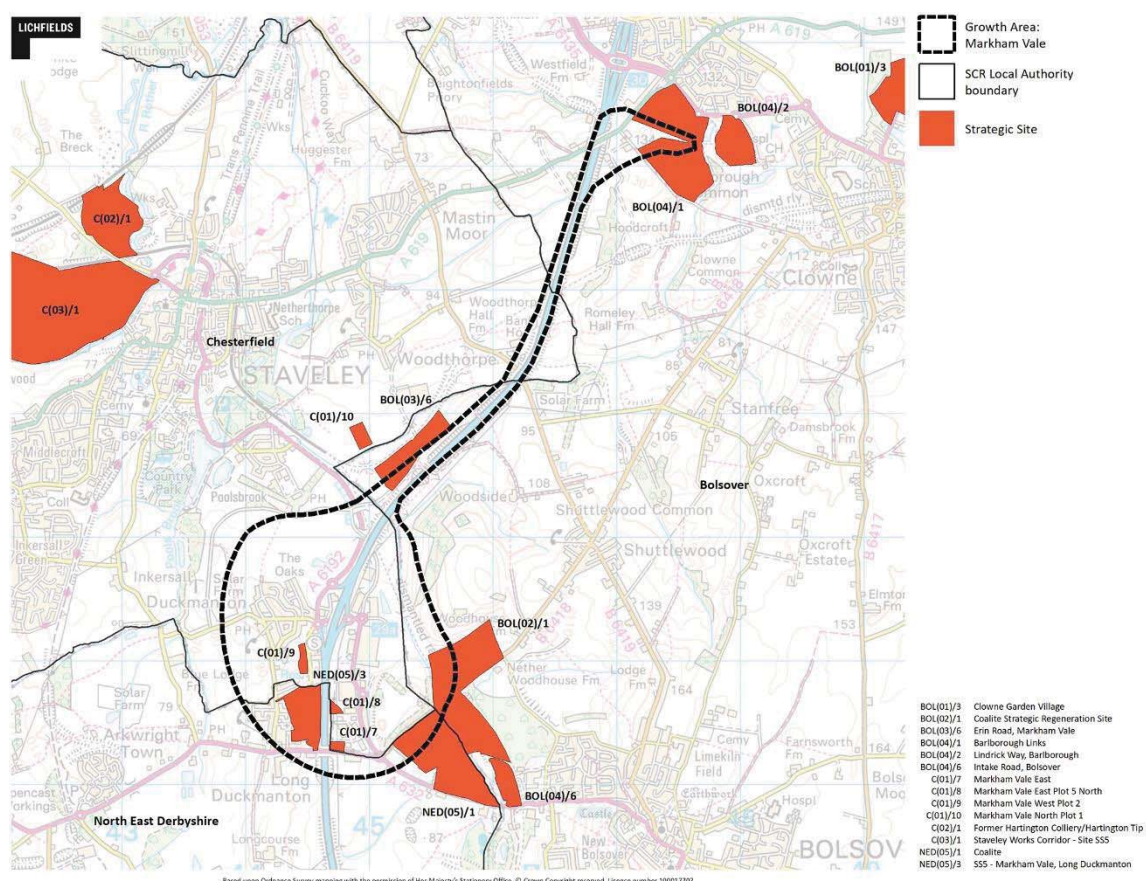

Source: Lichfields

Markham Vale Strategic Sites

5.6   The Markham Vale Growth Area comprises a cluster of sites around Junction 29A of the M1, straddling the administrative boundaries of Chesterfield, Bolsover and North East Derbyshire. The Growth Area also extends north towards (but not including) Junction 30 of the M1 and falls within the D2N2 LEP Area for strategic considerations. The **target sector for the Growth Area is advanced manufacturing**. Numerous stakeholders reported that the primary sector of Markham Vale is logistics and not advanced manufacturing as suggested in the SEP. Lichfields' site assessments have supported these views. It is recommended that the aspirations for the Growth Area be amended accordingly.

5.7   The development of Markham Vale has been very successful, and it is now recognised as one of the UK's premier logistics locations. In total, 67.04 hectares (net) has been identified across the sites. Many of the sites have now been built out and the majority of the identified land is located within the Coalite Site. The Coalite site to the south-east of the Growth Area is a major development opportunity straddling the boundaries of North East Derbyshire and Bolsover, although it is heavily constrained from its previous refinery use, as well as the proposed route of HS2. The recent expansion of Markham Vale has been to the north, off Erin Road and the Seymour Link Road where further B8 units and a railhead are being developed.

5.8   The Barlborough Links site at the very north (and mostly outside) of the Growth Area appears to be a sought after B2/B8 location, although we have seen little evidence of any tangible link to Markham Vale. It may be appropriate to redraw the boundary for this Growth Area to fully encompass the Coalite Site and the plots at Markham Vale North and exclude the Barlborough Links site. Barlborough Links, together with the Clowne Garden Village site, may benefit from consideration by NEDDC and Bolsover as a potential separate growth area.

Figure 5.4 Strategic Sites within the Markham Vale Growth Area

Source: Lichfields

The A61 Corridor Strategic Sites

5.9   The A61 Corridor encompasses an established urban / urban fringe industrial area close to the centre of Chesterfield through to Clay Cross in the south. It contains sites which lie within Chesterfield and North East Derbyshire and falls within the D2N2 LEP Area for strategic considerations. The former SCR SEP vision for the Growth Area is to bring about **mixed-use regeneration** in this corridor. Agents advised that the A61 and routes through Chesterfield are often congested and this, coupled with the separation of the Growth Area from the M1, is likely to deter logistics operators. However, it does support the SCR's target for mixed-use regeneration of which B-Class uses can form a component part. The site assessments and agent feedback also indicate that it could be appropriate to extend the southern part of the Growth Area to include the strategic sites to the east of Clay Cross and also extend to include the Staveley Works Corridor site to the north. There are no strategic sites identified to the west of the Wagon Works site, and consequently there is little justification for extending the boundary of the Growth Area further west of this site.

Figure 5.5 Strategic Sites within the A61 Corridor Growth Area
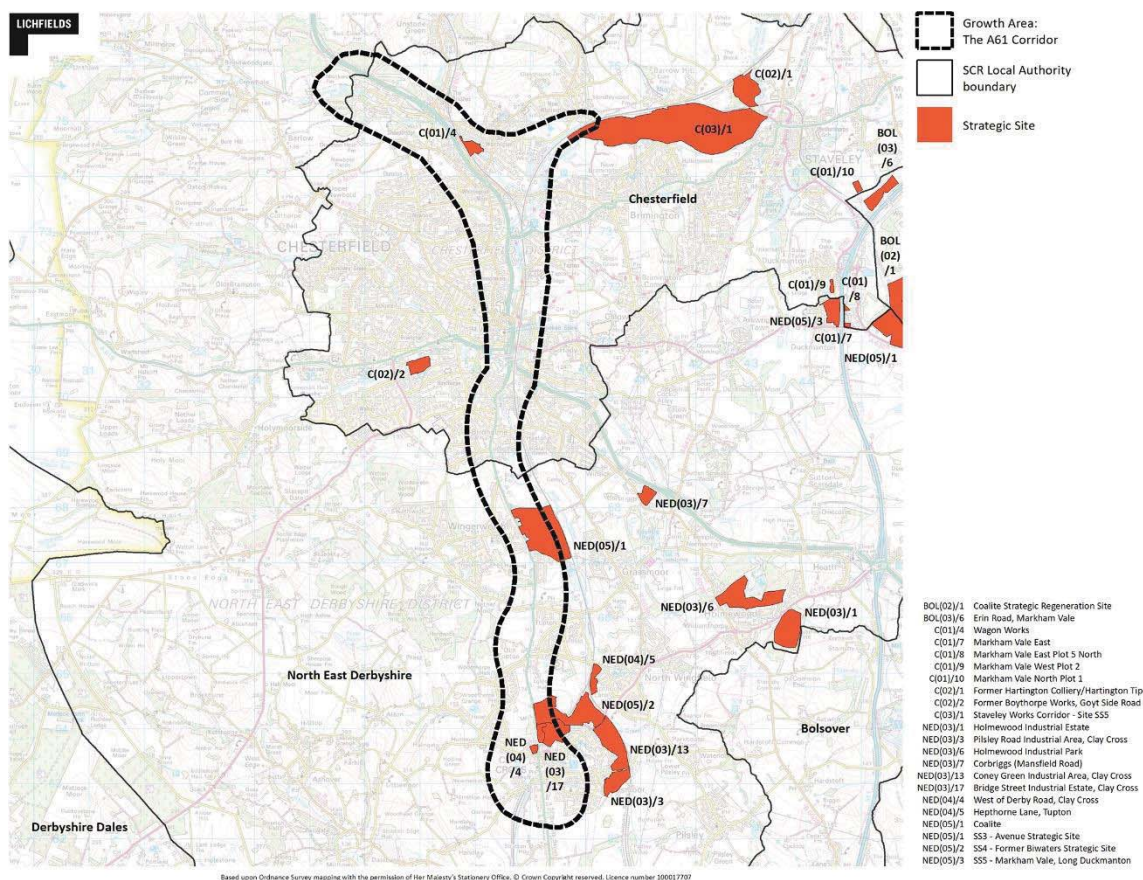
Source: Lichfields

Sheffield City Centre Strategic Sites

5.10   Sheffield City Centre is clearly a key area for growth within the Sheffield City Region. One strategic employment site has been identified within the City, Heart of the City II. The former SCR SEP **vision and key sectors identified for this are Knowledge, Creative and Digital Industries, Leisure, Higher Education, Culture and Financial and Professional Services**. The City Centre, AMID and Unity areas have all been identified as Growth Innovation Cluster Areas in the new draft SEP. Sheffield is undoubtedly perceived by the market as the prime office location in the SCR and the market is relatively strong in the City Centre; however, a number of stakeholders have suggested that Sheffield suffers from a lack of a defined 'office core' or quarter in the City Centre (similar to, for example, Spinningfields in Manchester City) with much of the B1a offer dispersed across the centre. It was also noted that good quality Grade A office space can often be difficult to find. As a result of this, some stakeholders considered that the Growth Area boundary should be more refined which would provide a better opportunity to develop an established core rather than sites being dispersed over a larger area.

5.11   The Heart of the City II site was the only strategic site assessed within the City Centre Growth Area. This major mixed-use site could contribute towards the overall Growth Area aims. As would be expected in a city centre location, there are a number of important employment sites which fall well below the 5 ha threshold set in this study for the strategic site assessments. The importance of these sites for supporting higher value jobs at much higher employment densities and stimulating investment is acknowledged, and, whilst it is beyond the remit of this study to

appraise these sites individually, it is considered that the designation of a City Centre Growth Area will enable employment and investment opportunities of strategic and regional importance to be directed to Sheffield City Centre.

Figure 5.6 Strategic Sites within Sheffield City Centre
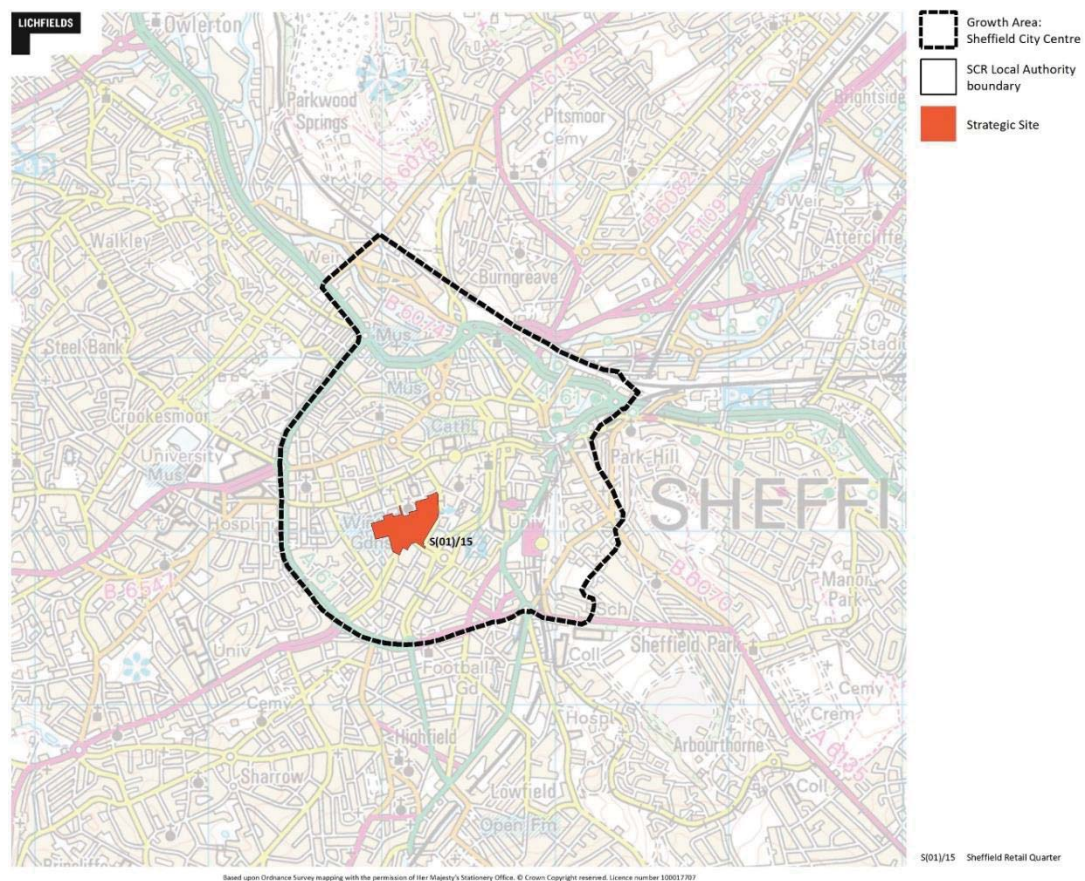
Source: Lichfields

Advanced Manufacturing Innovation District Strategic Sites

5.12   The Growth Area falls within Sheffield and Rotherham's boundaries, and several strategic sites are located within both districts. The **key sector is advanced manufacturing** and the area represents the key cluster for this in the sub-region, as well as hosting several other key developments including a major retail centre, sporting facilities and cultural attractions (notably the Olympic Legacy Park). AMID is also unique in the opportunities it presents for collaboration between higher education and industry, with both Sheffield University and Sheffield Hallam led research centres forming hubs of expertise for advanced manufacturing and health and wellbeing.

5.13   The assessment found that those sites clustered around the Advanced Manufacturing Park and the former Sheffield Business Park are most attractive to the advanced manufacturing sector, with many located close to established sites in the area that are already serving this purpose.

5.14   Given the established manufacturing core already in this area, it is considered the sites further out from the AMP and the Sheffield Business Park Advanced Manufacturing Cluster, particularly to the south near Meadowhall Shopping Centre and further north in Rotherham, are likely to be less attractive. Although such sites still offer suitable land to meet employment needs and could still come forward for manufacturing purposes, it is likely that the sites locating

closer to the Advanced Manufacturing Park have a stronger market attractiveness and would come forward sooner. Stakeholder feedback questioned the AMID's connection to Rotherham Town Centre and there is a need to undertake further work on how the Town Centre contributes to the AMID. There may be opportunities to improve linkages and integration between the AMID Templeborough area with the town centre and adjacent EastGate area.

Figure 5.7 Strategic Sites within the Sheffield Rotherham Don Valley Growth Area
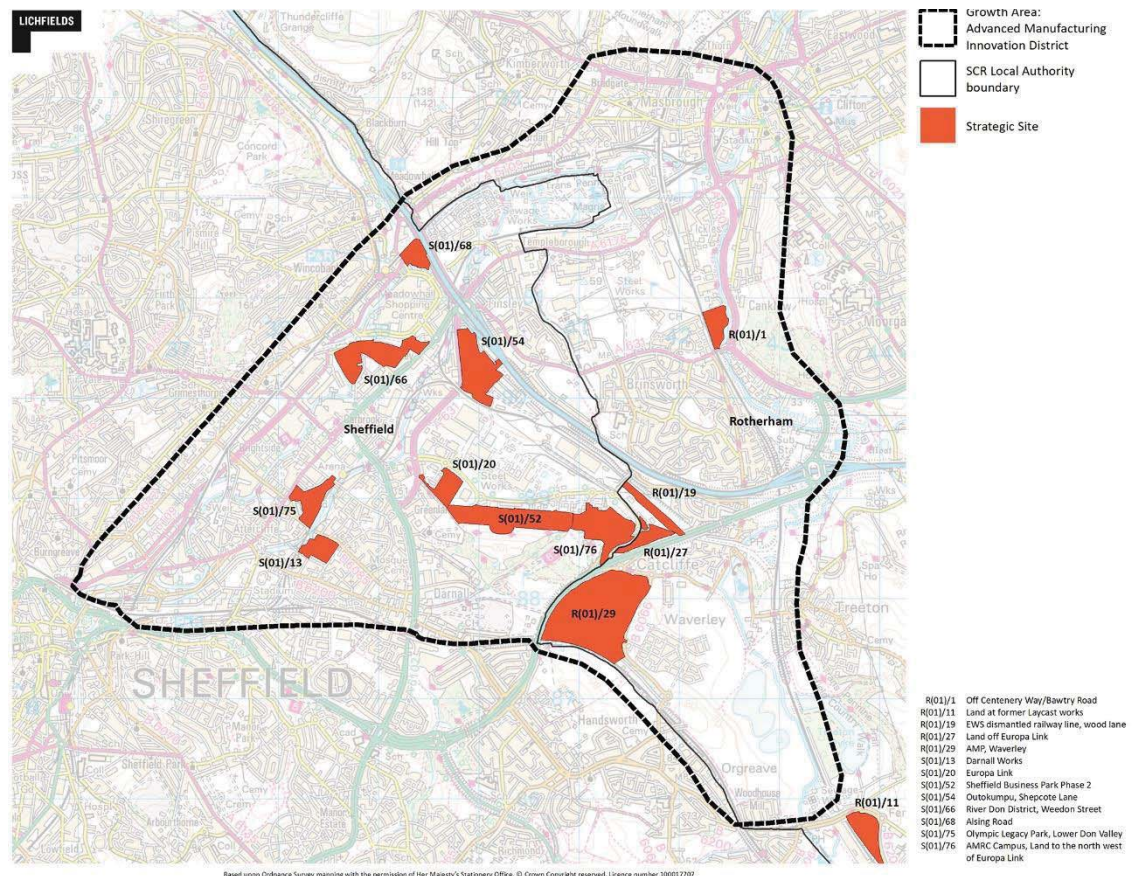
Source: Lichfields

DN7 / Unity Strategic Sites

5.15 The DN7 /Unity Growth Area contains just a single Strategic Site: the Unity Regeneration Project site, which is allocated for mixed use development in the emerging Doncaster Local Plan. The SCR's SEP and Infrastructure Investment Plan [IIP] envisage a **high-tech, low carbon, advanced energy park** within this Growth Area.

5.16 Doncaster Council is currently promoting the Unity site for employment development which is to include land for business, general industrial and storage and distribution uses, a training centre and energy related developments and associated education, technological and research facilities through its emerging Local Plan. The Unity site has outline planning permission and will help deliver SCR's ambitions for the Growth Area as set out in the SEP and IIP. The site is in a strategic location and is highly attractive the market, which gives it an advantage when seeking to attract new investment. Given its proximity to the M18 and M180 Motorways, it also aligns very well with the locational requirements of the logistics sector. Hence whilst it is a good site for energy uses, it also has the potential for B8 logistics. It is also noted from stakeholder

feedback that the market does not currently perceive the DN7/Unity site as being a location for 'high-tech' businesses.

5.17   There are other existing and proposed strategic employment sites to the north of the Growth Area around junction 6 of the. Therefore, it is considered that a case could be made to extend the growth area northwards to encompass a broader range of sites, whilst its target growth sectors could also be broadened to include logistics.

Figure 5.8 Strategic Sites within the DN7 / Unity Strategic Sites Growth Area
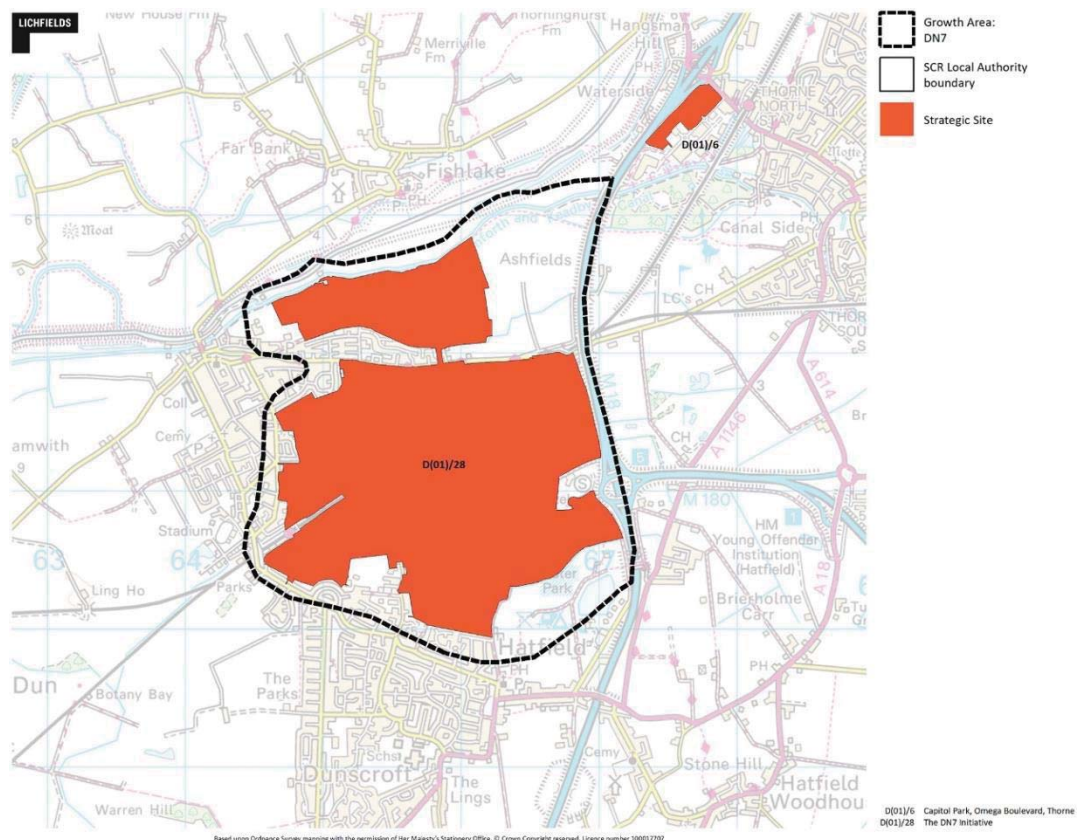
Source: Lichfields

Logistics Corridor Summary

5.18   In addition to the Growth Areas set above, a more broadly defined Logistics Corridor was also identified through the SCR Trade and Investment Plan. This covers a large tranche of land extending from central Doncaster in the north and following the route of the A1 south to Harworth. The key sites within the corridor are the iPort site in Doncaster and the emerging logistics sites around Junction 34 of the A1(M) to the south of Harworth including a large site to the South of Snape Lane, which has outline planning permission. Both of these locations and the northern and southern points of the corridor are considered to be excellent logistics locations which are attractive to the market.

5.19   However, there are no Local Plan allocated sites and no motorway junctions capable of supporting major new growth without significant infrastructure investment. Stakeholder feedback has identified that the logistics market is stronger along the M18, between the M1 and M180 in an east-west axis rather than north-south axis.

5.20   A number of potential sites have been assessed along the A1 in Bassetlaw which do not currently fall within a Growth Area (sites at Upper Morton and Markham Moor). In light of the

recommendations above regarding the Logistics Corridor and the removal of the sites to the
south of Harworth from that Growth Area, the SCR may wish to explore the possibility of
designating these sites which are located around recently upgraded junctions on the A1 as
'logistics nodes', which sit on a tier below the Logistics Corridor.

Other Strategic Sites

5.21   We assessed a number of strategic employment sites which are not within an SCR Growth Area
previously defined by the Integrated Infrastructure Plan. A list of the strategic sites are set out
within Appendix 1 of the report.

Growth Area Summary

5.22   Table 5.1 provides a summary of the number of sites which have been assessed, the combined
area (gross) and developable area (net) within each Growth Area at the time of analysis in late
2019. The Table also identifies the land which is considered could specifically meet the growth
area aspirations.

Table 5.1 Summary of Growth Areas

Growth Area	Number of Sites	Total Area (Gross)	Developable Area (Net)	Land to Meet Growth Area Aspirations
Dearne Valley and J36	7	182.37	132.53	77.89
Doncaster Sheffield Airport	5	168.58	140.48	107.08
Markham Vale	9	128.77	69.24	69.24
A61 Corridor	6	322.05	70.77	70.77
Sheffield City Centre	1	6.87	2.35	2.35
AMID	12	186.09	89.15	64.03
DN7/Unity	1	428.37	56	56

5.23   Based on the assessments, Table 5.2 summarises the implications of the site assessments for the
Growth Areas including the current dominant sectors identified and recommendations for each.

Table 5.2 Growth Area Findings

Growth Area	SCR target sectors	Current dominant sectors	Recommendations
Dearne Valley and J36	Freight logistics / Eco-Vision	Logistics, manufacturing	Extend Growth Area boundary to include Wentworth Industrial Park. Consider options for intervention to increase awareness of and appetite for 'eco-vision' or a fresh approach to attract higher quality operations and employment opportunities.
Doncaster Sheffield Airport	Logistics, engineering and associated aviation activities	Logistics, B1, associated aviation activities	Re-draw Growth Area boundary to exclude site at Bawtry Road and land west of A638 and south of Rossington.
Markham Vale	Advanced manufacturing	Logistics	Recognise success of Growth Area as a logistics hub rather than advanced manufacturing. Look for opportunities for expansion land. Recommendation to remove Barlborough Links from the existing growth area and potential for Council to consider an additional Growth Area which includes Barlborough Links and Clowne Garden Village.
A61 Corridor	Mixed-use regeneration	Mixed use	Extend Growth Area boundary to include Staveley Works Corridor site and sites to east of Clay Cross. Amend boundary to exclude land west of Wagon Works site. Seek opportunities to attract sectors identified by Chesterfield and North East Derbyshire and resist residential development where appropriate.

Growth Area	SCR target sectors	Current dominant sectors	Recommendations
Sheffield City Centre	Knowledge, CDI, Leisure and Higher Education, Culture and Financial and Professional Services	Knowledge, CDI, Leisure and Higher Education, Culture and Financial and Professional Services	Consider refining the boundary for the Growth Area to help establish a Grade A office core in the City Centre.
AMID	Advanced manufacturing	Advanced manufacturing, general B2	Suggest better linkages / integration between AMID Templeborough area with the town centre and adjacent EastGate area (ie. Via place packages/town deals). Consider expansion land in these locations (i.e. South of Sheffield Business Park Phase 2).
DN7 / Unity	Green businesses / energy park	Undeveloped, but within an area attractive to logistics sector	This Growth Area contains one strategic site which is proposed to be allocated in the emerging Doncaster Local Plan and has outline permission. It is questionable whether there is merit in continuing to define this as a Growth Area focused around an energy park by the SCR. Unity has been identified as a Global Innovation Cluster area in the draft new SEP. Target employment sectors could be broadened to reflect more recent SEP and Local Plan ambitions and there is potential to extend the area northwards to encompass a broader range of sites

5.24   In conclusion, the sites analysed within each growth area, alongside those in the broadly defined logistics corridor and longer list of sites at Appendix 1, illustrate the range of strategic employment opportunities in the city region.

6.0   Demand / Supply Balance

6.1   As outlined within Section 2.0, the most up to date position for each LPA within the SCR in terms of its Local Plan status and economic needs evidence base is set out as well as the demand for and supply of employment land this evidence base illustrates. As explained in that section, there are inevitable differences in the available data for each LPA, including the age of the assessments, the methods and time periods of forecasting future needs.

6.2   The current demand for and supply of employment land by LPA is set out in Table 6.1.

Table 6.1 Demand Supply Balance

LPA	Total demand	Supply	Balance
South Yorkshire			
Barnsley	291	297	+6
Doncaster	481	482	+1
Rotherham	235	264	+29
Sheffield	200	175	-25
Derbyshire			
Bassetlaw	68	108[3]	+40
Bolsover	92	92	0
Chesterfield	44	44	0
Derbyshire Dales	15	24	+9
North East Derbyshire	42.7	38.4	-4.3
TOTAL	**1,468.7**	**1,524.4**	**+55.7**

Source: Lichfields analysis

6.3   There is a general surplus of employment land within the SCR, although this is predominantly located within the South Yorkshire districts in the northern half of the region and Bassetlaw District. Two LPAs (Sheffield and North East Derbyshire) appear to have a shortfall of employment land at the time of analysis, although work is being undertaken locally to address this in new Local Plans.

6.4   Surplus employment land has been assessed in this study within Rotherham and Barnsley which could, theoretically, more than make up for the shortfall in other areas like Sheffield. A number of sites with vacant land appear to be well connected to the labour supply within Sheffield and districts should work together to explore this opportunity further.

6.5   In the southern part of the SCR, Derbyshire Dales has a 9 ha surplus and North East Derbyshire a shortfall of approximately 5 ha, whilst the remaining three Derbyshire authorities have no surplus or shortfall of employment land. Due to the location of the strategic sites within Derbyshire Dales and their remoteness from the main urban and employment areas of North East Derbyshire, opportunities to 'share' employment land needs between the two LPAs are not readily identifiable through the sites assessed in this study. The lack of any surplus across these authorities could lead to businesses seeking land outside of the SCR due to a lack of choice in the market, or if existing identified sites do not come forward as expected.

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[3] Note – the emerging Bassetlaw Local Plan seeks to allocate 108.38 hectares of 'General Employment Sites', and 199.6 hectares of strategic employment land available only to meet the specific needs of footloose national and regional business investment or the significant expansion of a local business. As such, the Strategic Employment Land sites are not included in this table.

Figure 6.1 Sheffield City Region: Supply of Allocated/Committed Employment Land (2019)
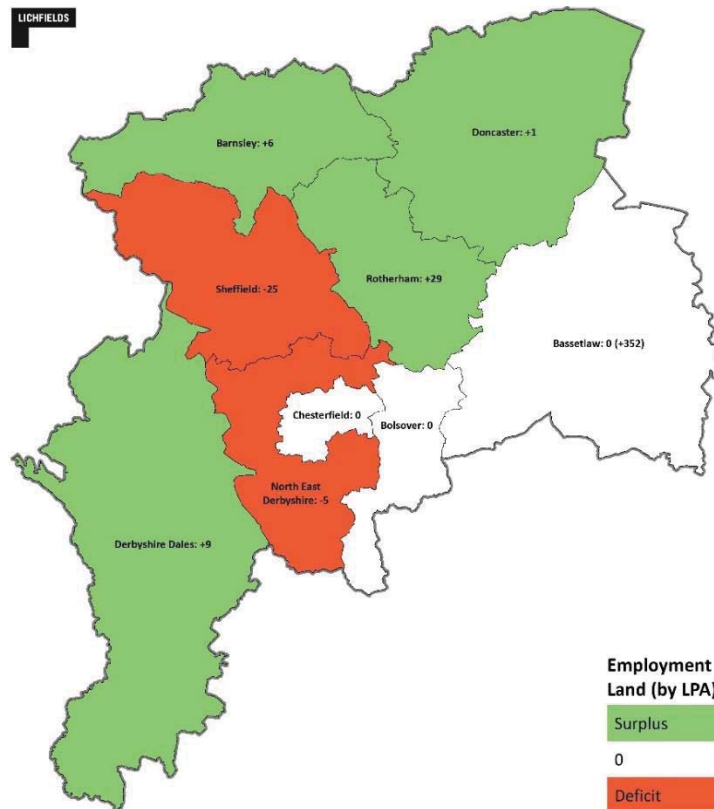
Source: Lichfields Analysis / Various ELRs / Council Officers

6.6   The Growth Area aspirations do not necessarily match the target sectors identified by the LPAs across the SCR, although there are good future logistics sites within Doncaster and Bassetlaw (and this sector is being targeted by the LPAs and SCR) and potential future sites suitable for advanced manufacturing in Sheffield and Rotherham (although additional land should be identified within the AMID in Sheffield to meet future needs).

6.7   The Markham Vale Growth Area has been very successful in recent years, and the sites we have assessed in this location offer room for some expansion. A key site for the future development of the Growth Area is the Coalite site. Stakeholder engagement suggested that this site could be heavily constrained by its previous use; however, feedback from North East Derbyshire and Bolsover indicates that significant remediation work is ongoing. The site would also be partly sterilised in future by the proposed route of HS2. It is therefore recommended that the authorities of North East Derbyshire, Bolsover and Chesterfield work together to identify the most appropriate location for future growth at Markham Vale, beyond the sites assessed in this study.

6.8   The DN7/Unity Growth Area and Dearne Valley Junction 36 Growth Area have in the past been identified by the SCR as being locations for the growth of green/eco-businesses. Our site assessments and stakeholder engagement have found little evidence of this sector as being dominant or important to these locations and we understand that it is less of a priority for the LPAs involved. Additionally, the employment land evidence base for Barnsley does not identify this sector as a particular priority, and although the emerging Doncaster Local Plan states that the Unity site could accommodate energy related developments, this is part of a mixed business, general industrial and storage and distribution uses. It is therefore recommended that the SCR works with these authorities to ascertain how green/eco-businesses can be attracted to these

locations as well as other potential future high growth industries which can attract the type of quality employment desired for these areas, so that it can form an important role in the development of the Growth Areas.

7.0 Conclusions

7.1   This report provides a summary of the high-level appraisal of strategic employment land supply undertaken on behalf of the Sheffield City Region Combined Authority based on the geography of the previous LEP area. The study has identified that many of the ELRs were carried out at different points over the past five years or more, with different timeframes. However, in general, the Local Plans and ELRs used to form this assessment forecast needs up to the periods 2032 to 2035 and it is considered that this represents a reasonable level of planning alignment.

7.2   In terms of methodologies and targets within the documents, there does not appear to be any districts that are significantly out of line with the rest, and it is considered that the data represents a reasonable overview of the future supply (and potential shortfalls/oversupply) across the City Region based on the current evidence base.

7.3   The Study concludes that the jobs growth target (+70,000) is broadly on track. It is therefore appropriate to maintain this as a target, but this may be achieved over a slightly longer time period than initially envisaged as REM projects job growth to tail off over the latter part of the projection period. Maintenance of an overall target of this magnitude alongside a focus on securing higher value investment in employment and productivity would be appropriate.

7.4   Strategic B-Class needs across the wider SCR FEMA should be considered by the local planning authorities. There is a need for the SCR authorities to collaborate in this regard and this Study represents a springboard for this process. For example, the Study demonstrates the potential for further land supply in Bassetlaw and Bolsover where strategic B8 needs could be met, and where these two authorities can make the most of their areas' strategic road connectivity whilst reducing the pressure for B8 in other parts of the city region where other employment uses may be attracted.

7.5   Overall, the evidence base and emerging and recently adopted Local Plans indicate an employment land need in the region of **1,468.7** ha, and a supply of **1,524.4** ha, giving an overall surplus of **56** ha.

7.6   The study has highlighted that taking into account that there are numerous sites below the 5 ha threshold size looked at by this study which means that there is an overall general surplus of employment land across the SCR, although Sheffield is shown to have a shortfall of 25 ha and North East Derbyshire a (quantitative) shortfall of 4 ha. At the time of this report, a new employment land review is underway for Sheffield which will analyse in more detail the current supply against the requirements of the whole plan period. North East Derbyshire is also currently (at the time of writing) undergoing examination on its emerging Local Plan, and it is understood that the appointed Inspector presently remains comfortable regarding the shortfall given the potential for some level of flexibility in supply from the potential mixed-use redevelopment of the Coalite site, and the Dronfield Regeneration Area.

7.7   The largest surplus is located within Bassetlaw (40 ha) and Rotherham (29 ha) and there is therefore scope to consider how these opportunities could be maximised for the city region more widely. For example, sites have been assessed with the AMID Growth Areas within Rotherham which could accommodate business and employment needs for the wider SCR area. There is also available land to the north of Sheffield in Barnsley, which has a 6 ha surplus, and the sites around Junction 36 of the M1 have been found to be suitable for logistics as well as other potential employment uses; these are accessible locations which could benefit the wider SCR area.

7.8   The surplus employment land is predominantly located within the South Yorkshire authorities within the northern half of the SCR and Bassetlaw District. In the southern part of the SCR,

three of the five Derbyshire authorities have no surplus or shortfall of employment land. Derbyshire Dales has a 9 hectare surplus and, as stated above, North East Derbyshire has a 4 hectare shortfall. The study has highlighted that the surplus land within Derbyshire Dales is unlikely to be suitable for meeting needs in the neighbouring authorities. It has also been highlighted that the lack of any surplus in the remaining Derbyshire authorities could ultimately lead to businesses seeking land outside of the SCR due to a lack of choice in the market, or if existing identified sites do not come forward as expected.

7.9   The Study summarises the economic growth potential of different individual sectors for each of the 9 districts within the Sheffield City Region, based on current representation and growth potential identified in the latest Experian REM projections (supplemented by stakeholder discussions). All of the districts have sectors where they are currently strong, from General Manufacturing in Barnsley, Bassetlaw, NE Derbyshire, Rotherham and Sheffield, through to Leisure and Recreation in Derbyshire Dales. It also indicates that the SCR is generally weak in white collar sectors, notably Financial and Professional Services, with only Sheffield City accommodating an established white-collar office market with strong representation in this sector at present.

7.10   The analysis applies weight to the prospective economic growth prospects of a particular sector based on the latest Experian forecasts. As such, no allowance has been made for a district's aspirations unless these align closely with the REM growth forecasts. This suggests that certain sectors, such as Utilities and General Manufacturing, are likely to weaken almost across the whole SCR, whilst others are likely to see significant growth, such as distribution and leisure.

7.11   This Study has not sought to re-define the FEMA boundaries that have been justified by each individual district over the course of their Local Plan preparations, and within which each district has sought to plan for its B-Class employment land needs. Given the highly complex pattern it is reasonable to maintain existing FEMAs at a local level, although looking strategically it makes sense to consider land requirements across SY and SCR. This is particularly relevant for large scale logistics requirements, which are often highly footloose and based around Motorway junctions serving a 'greater than local' catchment. This aligns with the recently updated PPG advice.

7.12   Economic growth over the next 5 years and its impact the employment land portfolio is difficult to predict with any accuracy as the economy navigates challenging times particularly post-Covid 19. The Study focusses on the economic prospects over a timeframe that is likely to see successive business cycles play out, such that the inherent strengths of the SCR economy overall (irrespective of a shortfall of higher value jobs being attracted against SEP aspirations) has, and is likely in the future to, show resilience similar to the recovery following the 2008 recession. Consequently, it is reasonable to anticipate continued economic growth, albeit with variable rates within the period to 2036.

7.13   In terms of which of the key employment sites are best placed to provide higher value jobs, the Study suggest that all of the strategic sites have a role to play in this regard, including the delivery of higher value jobs. The Study does not conclude, for example, that any of the identified strategic sites should be removed, rather than some of them should be re-defined to better reflect this potential (e.g. Markham Vale) and others should be encompassed within re-defined Growth Areas, to better reflect the relationship to the specific sites identified by the relevant authorities (e.g. Clay Cross).

7.14   The SEP target sectors such as Advanced Manufacturing and Logistics, have not grown in accordance with the aspiration to date and it will be challenging to meet these 'targets' to 2023. This does not mean that these sectors should be abandoned as targets for increasing the value of jobs in the SCR and the successes of the AMP and Markham Vale can be applied elsewhere, for

example, linkages with universities, to enhance the prospects of successfully securing greater representation from these sectors. In a situation where there is high employment, it would be justified to focus strategic sites on a combination of currently successful market sectors and the aspirational sectors where some success has been achieved and where greater productivity can be delivered.

Recommendations

7.15   Our analysis of the strategic sites and Growth Area aspirations has highlighted a number of areas where the constituent authorities with SCR and D2N2 in their respective LEP areas may wish to undertake further work to address the main issues and options identified. These are summarised below:

- Our assessment of sites in the Dearne Valley and Junction 36 Growth Area, as well as stakeholder discussions, have indicated a potential for dominance from lower skilled (logistics and general manufacturing) sectors. If the SCR and Barnsley are committed to developing the Growth Area for higher skilled employment uses, it is recommended that the authorities develop a collaborative vision or masterplan for how this will be achieved.

- It is recommended that the following Growth Area boundaries are reviewed so that they better reflect the location of strategic sites and future development opportunities:

    i   **Dearne Valley and Junction 36** – potential to extend westwards and include Wentworth Industrial Park;

    ii   **Doncaster Sheffield Airport** – suggested that the site at Bawtry Road is excluded as it is remote from the airport site and associated uses;

    iii **Markham Vale** – may be appropriate to redraw the boundary for this Growth Area to fully encompass the Coalite Site and the plots at Markham Vale North, and exclude the Barlborough Links site. It's considered Barlborough Links together with the Clowne Garden Village site may benefit from consideration by NEDDC and Bolsover as a potential separate growth area;

    iv   **A61 Corridor** - could be appropriate to extend the southern part of the Growth Area to include the strategic sites to the east of Clay Cross and also extend to include the Staveley Works Corridor site to the north;

    v   **Sheffield City Centre** – condense Growth Area boundary to develop an established core rather than have sites dispersed over a larger area;

    vi   **DN7 / Unity** – potential to extend the Growth Area northwards to encompass a broader range of sites around junction 6 of the M18.

- Many of the strategic sites considered in this study have been found to offer good or very good potential for the logistics sector given their size and location relative to the strategic road network and motorways. To protect some sites for higher grade uses such as advanced manufacturing, LPAs may wish to work together to steer footloose economic uses such as logistics to optimum locations through a collaborative strategy. In South Yorkshire, these higher-grade sites are likely to be found particularly in the growth innovation cluster areas as identified in the emerging SEP.

- There is a clear appetite from Bolsover and NED to remediate and redevelop the Coalite site. It is recommended that the two LPAs work together to produce a clear strategy for the site, perhaps through an agreed Development Brief.

- The review of deprivation suggests there are a number of strategic sites located within more deprived areas. It is recommended that LPAs use this information to see what skills and attainment gaps may exist in those areas to allow local people to access jobs at these sites.

- This study has assessed the suitability of strategic sites and their fit with Growth Area objectives based on the current situation on the ground. LPAs may wish to examine how the sites fit with potential future developments and transport interventions.

- The study has found that there may be a potential for development requirements to be met in neighbouring authorities where there are areas of employment deficit and surplus. It is for the LPAs to agree with each other how best to take this forward, perhaps through a Statement of Common Ground.

Appendix 1 Strategic Site List

Site Address	Gross Area (HA)	Net Area (Ha)
Barnsley		
Land South of Dearne Valley Parkway	72.85	54.64
Thurnscoe Business Park	5.07	2
Land West of Sheffield Road	49.39	37.04
Shortwood Extension	11.81	5.79
Land South of Dearne Valley Parkway	28.16	21.12
Ashroyd	6.17	4.17
Land East of Park Spring Road, Houghton	7.55	6.8
Capitol Park Extension	5.43	5.43
Capitol Park	5.35	0
Land off Ferrymoor Way	16.96	15.26
Rockingham (allocation ES14)	4.43	4.43
Rockingham (allocation ES14)	2.91	2.1
Rockingham (allocation ES14)	1.58	1.24
Land at Wentworth Industrial Park	9.39	0
Land South of Barugh Green Road	123.31	32.25
Bassetlaw		
Welbeck Colliery Budby Road Cuckney	29.7	6
Land South of Gateford Road	17.2	4.5
Peaks Hill Farm	17.8	10.6
Land off A57 Bypass Manton Wood	25.7	11
Shireoaks Common	15.40	15.4
Trinity Farm land North Road	18.10	11.11
Explore Steetley	48.98	16
South of Snape Lane	80.90	80.9
Bawtry Road	33.40	33.4
Apleyhead Junction	188.52	118.7
High Marnham Power Station	137.90	60
Holme House Farm, Owday Lane	20.32	20.32
South of Gamston Airfield	11.46	11.46
Snape Lane	41.39	41.39
Treswell Road	14.33	14.33
Retford Road	26.15	26.15
North of Grove Road	6.66	6.66
North of Sturton village	42.15	42.15
Main Street	24.04	24.04
Symmetry Park, Harworth Road	20.70	9.85
Bassetlaw Garden Village	216.00	15
Coalfield Lane	17.65	15
Bolsover		
Whitwell Tip	6.60	5.61
Clowne Garden Village	24.97	20
Coalite Strategic Regeneration Site	36.62	29.3
Land off Explore Way, Steetley	13.49	11.47
Erin Road, Markham Vale	11.98	5.99
Land at Wincobank Farm, South Normanton	14.56	13.1
Barlborough Links	34.69	1.44
Lindrick Way, Barlborough	9.78	0
Intake Road, Bolsover	5.45	0

East View Industrial Estate	8.09	0
Vernon Street, Shirebrook	12.10	9.08
Shirebrook Business Park	41.50	0
Berristow Lane, South Normanton	58.42	0
Saw Pit Industrial Estate	14.61	0
Fordbridge Lane near Blackwell	5.83	0
Brookhill Industrial Estate	40.88	0
Clover Nook Industrial Estate	41.14	0
Castle wood Business Park	9.81	0
Farmwell Lane	12.80	0
EPC - UK explosives	32.04	0
Doe Lea Depot	5.89	0
Chesterfield		
Wagon Works	6.31	6
Markham Vale East	0.80	0
Markham Vale East Plot 5 North	0.75	0.75
Markham Vale West Plot 2	1.47	1.47
Markham Vale North Plot 1	2.20	2.2
Former Hartington Colliery/Hartington Tip	20.37	20.37
Former Boythorpe Works, Goyt Side Road	8.92	4.29
Staveley Works Corridor – site SS5	188.09	179.08
Derbyshire Dales		
Land at Cawdor Quarry, Matlock	28.41	1
Land at Halldale Quarry, Matlock	27.02	2
Land at Ashbourne Airfield, Ashbourne (phase 2)	58.90	8
Land at Middleton Road/Cromford Road, Wirksworth	9.46	2
Land at Pisani Works, Derby Road, Cromford	3.12	3.12
Land at Porter Lane East, Cromford	0.85	0.85
Land at Porter Lane/Cromford Road, Wirksworth	1.09	1.09
Ashbourne Airfield Industrial Estate, Ashbourne	40.21	2.85
Land at Middle Peak Quarry	61.51	2
Doncaster		
Land at Carcroft Common, Carcroft	49.28	24.64
Askern Saw Mills, High Street, Askern	15.08	13.57
Plot 1, Lakeside, Potteric Carr Road	8.48	5
Doncaster Sheffield Airport ltd., First Avenue Auckley	13.17	13.17
Blaxton Quarry, Mosham Road, Auckley	9.47	9.47
McCormick Tractors International, Wheatley Hall Road, Wheatley	41.41	9.5
Land West of West End Lane, Rossington	398.31	158
Land South of Holme Wood Lane, Armthorpe	30.42	15.38
Land off Hatfield Lane, Armthorpe	12.74	12.74
The DN7 Initiative	428.37	56
Land at Marshgate, Doncaster	5.63	1
Safeguarded Cargo Area, Robin Hood Airport	44.04	33.03
Tornado, Redhouse Interchange	6.91	0
Land South of Holme Wood Lane	16.35	0
Capitol Park, Omega Boulevard, Thorne	8.94	0
Land and Buildings on the North Side of Land Ends Road, Thorne	7.28	0
Parkside Industrial Estate, Wheatley Hall Road, Wheatley	5.94	0
Balby Carr Bank, Balby	11.25	11.25

Site 2, Land East of Poplars Farm, Hurst Lane, Auckley	68.54	51.41
Site A - East of Bankwood Lane, Rossington	17.68	17.68
Junction 6 M18, Thorne North	73.63	73.63
North East Derbyshire		
Dronfield Regeneration Area	9.08	6
HOLMEWOOD INDUSTRIAL ESTATE	25.90	0
PILSLEY ROAD INDUSTRIAL AREA, CLAY CROSS	13.58	0
SHEFFIELD ROAD INDUSTRIAL AREA, KILLAMARSH	5.42	0
HOLMEWOOD INDUSTRIAL PARK	33.63	0
CORBRIGGS (MANSFIELD ROAD)	6.65	0
ROTHERSIDE ROAD INDUSTRIAL ESTATE, ECKINGTON	7.55	0.92
CALLYWHITE LANE INDUSTRIAL ESTATE, DRONFIELD	30.39	0
NORWOOD INDUSTRIAL ESTATE, KILLAMARSH	13.34	0
Wreakes Lane / Stubley Lane Industrial Area	10.73	0
WESTTHORPE FIELDS BUSINESS PARK, KILLAMARSH	5.78	0.39
CONEY GREEN INDUSTRIAL AREA, CLAY CROSS	28.34	9.03
RENISHAW INDUSTRIAL ESTATE	12.20	2.5
BRIDGE STREET INDUSTRIAL ESTATE, CLAY CROSS	15.71	3.72
Stubley Lane, Dronfield	5.55	0
West of Derby Road, Clay Cross	5.89	0
Hepthorne Lane, Tupton	6.34	3.32
Stonebroom Industrial Estate	6.66	0
Bailey Drive, Killamarsh	5.63	5.07
SS3 - Avenue Strategic Site	63.80	4
SS4 - Former Biwaters Strategic Site	42.25	8
SS5 - Markham Vale, Long Duckmanton	11.58	5.2
Coalite	28.64	21.48
Rotherham		
Off Centenery Way/ Bawtry Road	6.65	6.65
Land to south of Aldwarke Lane - adjacent Yorkshire Water STW	10.22	10.22
Roundwood Colliery access off Aldwarke Lane	6.16	6.16
Land within Aldwarke Steel Works (Corus) off Doncaster Road	7.11	7.11
Land off Bookers Way	6.95	5.9
land at former Laycast works	9.33	7.1
North of Thurcroft Industrial Estate	6.17	6.17
EWS dismantled railway line, wood lane	5.85	5.85
Land off Cumwell Lane	15.98	15.89
Land to west of Mansfield Road, Waleswood Vector 31	8.85	8.85
Land to the south of Monksbridge Road	17.08	15.37
Land off Europa Link	6.23	6.23
AMP, Waverley	58.92	12.88
Off Waleswood Way	20.82	17.7
Sheffield		
Darnall Works	6.46	2
Sheffield Retail Quarter	6.87	2.35
Europa Link	6.82	0.8
Neepsend Gas Works Tip	5.49	0
Smithywood, Cowley Hill, Chapeltown	13.32	11.32
Sheffield Business Park Phase 2	23.81	22.6
Outokumpu, Shepcote Lane	19.53	17.58

Beeleywood, Claywheels Lane	9.79	4.9
River Don District, Weedon Street	18.45	10.6
Alsing Road	5.54	5.54
Olympic Legacy Park, Lower Don Valley	9.34	0
AMRC Campus, Land to the north west of Europa Link	18.49	10

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