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FAREHAM BOROUGH

Business Needs, Site Assessments and Employment Land Study

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**Prepared for:
Fareham Borough Council**

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1.0 STUDY BRIEF AND OBJECTIVES

- 1.1 Lambert Smith Hampton (LSH) have been commissioned by Fareham Borough Council (FBC) to prepare an Employment Land Study to determine the quality and suitability of existing and potential new employment sites and to identify if there are any gaps in the provision over the period of the emerging Local Plan to 2036.
- 1.2 The objective of this Employment Study is to deliver a rounded and reliable assessment of existing industrial and office employment sites in the Borough in terms of their market demand and appeal, and their ability to satisfy occupier's requirements now and into the future.
- 1.3 Our report aims to examine and validate the qualitative data we have supplied for each site, to provide a market based perspective and to give the analysis a 'commercial edge'. We have identified the sites that are well suited to meet the needs of modern business; sites that should be safeguarded against competing higher value uses; any sites that may be subject to market failure; potential 'windfall' sites that may not have been previously identified; and those sites most unlikely to be brought forward for future employment use.
- 1.4 In turn, this assessment will help to set targets for the identification of new sites, and sites to be protected for employment use, in the new Local Spatial Plan to ensure that sufficient employment land is of the right type and in the right location - to be preserved or released and to satisfy property requirements for both existing businesses, start-up enterprises and potential new inward employers into the Borough. These will be measured in both employment floorspace projections (sq m) and the land required to accommodate the future demand (Ha).
- 1.5 The Council's approach to planning for employment floorspace in the Draft Local Plan was based on evidence produced and agreed through PUSH (via GL Hearn). In summary the initial Draft Local Plan planned for 130,000 sq m of employment floorspace, over the period 2011 to 2036.

1.6 In light of the proposed increases to housing need, the Council requires its employment floorspace need to be re-assessed in order to inform and robustly support the emerging Local Plan through public consultation and satisfy examination. This assessment of employment floorspace need must produce an overall floorspace (sq m) need figure for the Borough for the period from 2018 to 2036, but which is also divided into the floorspace needs for office, general business/manufacturing and warehousing/logistics.

1.7 **This report contains the following:**

- Details of the study methodology that we have used in appraising the employment sites, including the research sources that have been consulted and how they relate in a property market context;
- Commentary that demonstrates a critical understanding of the recent work undertaken by GL Hearn on behalf of the PUSH authorities, by Oxford Economics and AECOM on behalf of the Solent LEP and other research relevant to consider the implications for future employment land provision in Fareham;
- An overview of the broader market dynamics for the supply of and demand for office, industrial and warehouse floorspace within the study area over the past 20 years or so, to understand the current tensions and to inform a discussion of possible changes/trends in the market over the next 5 years and beyond;
- An overview of the competition and future prospects for the local and sub-regional office and industrial property market and to provide indicative rental and capital values to then comment on occupier affordability and viability of undertaking new development;
- Conclusions on the current suitability of the assessed employment sites for meeting existing and future demand, taking account of the potential to enhance floorspace provision through new investment and land release; and to highlight market barriers and infrastructure constraints.

- Identification of any gaps in the Borough's employment land provision, with particular regard to the economic sectors that are prioritised for investment and growth by the Solent LEP and associated economic strategies.

1.8 This Employment Land Review will form part of the evidence and rationale to inform the emerging Local Spatial Plan being prepared by FBC Planning Officers and is therefore intended to provide a market focus and is not to prescribe any formal recommendations or preempt Council decisions. We would also apply the following caveats to our report:

- That prevailing economic conditions on a local, national and global scale are clearly susceptible to short and longer term fluctuations which will have an adverse or positive impact on occupier demand and therefore affect the value and delivery of employment land and to be realistic, during the Plan forecasting period, inevitably political and unforeseen influences will significantly affect the outcomes;
- Where we have identified sites or buildings which may or may not become available for redevelopment within a certain timescale, this is based on well informed market knowledge at the time of the study's preparation; however site circumstances, planning assumptions, land ownership, property values etc. are liable to change;
- The reference to existing or potential employment sites and buildings in the report does not preclude them from being developed for other purposes and clearly any planning application would be judged on its own merits. Whilst we have provided a comprehensive assessment, it is recognised and encouraged that new, and hitherto unrevealed, employment site opportunities will continue to come forward.

1.9 Planning Practice Guidance (paragraph 030) indicates that employment floorspace needs should be calculated, in consideration of the following factors:

- Recent employment land supply and loss to other uses;

- Market intelligence (from discussions with developers, property agents, business needs surveys and engagement with business/economic forums);
- Market signals (levels and changes in rental values and differentials in land values in different uses);
- Public information on employment land and premises required;
- Information on infrastructure constraints to employment developments;
- Existing stock of employment land (sites with planning permissions but not built out and current vacancies);
- Locational and premises requirements of particular types/sectors of business;
- Identification of oversupply and evidence of market failure.

1.10 As part of the assessment of need, we provide additional analysis that addresses the following:

- **Logistics Need** – as part of the floorspace need that is calculated for B8 warehousing, what proportion of this will be for ‘home delivery’ logistics (i.e. to service internet shopping.) and what are the locational requirements for this in the Borough; what is the floorspace scale of such logistics demand.
- **Start-Up Units** – as part of the floorspace need that is calculated for office and general business/light industrial uses, what is the proportion of need for ‘start-up’ style units; the scale of such enterprise floorspace and the optimum locations.

2.0 METHODOLOGY AND PLANNING POLICY FRAMEWORK

- 2.1 Our intention is to provide a realistic, market orientated study on the projected level of occupier demand and compare the existing and future supply of employment land (predominantly those with B class availability) based on our extensive market knowledge and research across the Solent region.
- 2.2 In order to inform and prepare this study, we have consulted various relevant research documents, which have included the PUSH Spatial Position Statement (June 2016); Fareham Draft Local Plan 2036 (SELAA October 2017); National Planning Policy Framework (Ministry of Housing, Communities & Local Government July 2018); Solent LEP Strategic Plan 2014-20 (Jan 2014) and other informative documents.
- 2.3 We have purposefully spent time 'on the ground' revisiting industrial estates and office parks within the Borough environs, to ensure our intelligence is up to date and accurately represented and to better understand the status and activity levels of the occupier's business, the age and state of repair of buildings, the calibre of the environment and the suitability of each building for continued occupation or its redevelopment prospects. Our study is not theoretically based or desk based but derived from day to day experience of engaging with businesses who are seeking and conducting property transactions.
- 2.4 To enable a comparative assessment, we have devised a scoring and subsequent ranking system based on a list of criteria which can be used to assess the quality of existing floorspace for both, industrial estates and office accommodation, as well as potential redevelopment opportunities.
- 2.5 To support this study, we have analysed the supply of industrial employment floorspace (both historically and at the present time), the future supply of employment development land, the floorspace take up data year by year and have also considered the growth and job targets adopted by PUSH, the Solent LEP and the Local Authority.

- 2.6 In forecasting employment growth and economic activity, the cyclical nature of the UK and world markets, the recovery following the economic downturn from 2008-2013 and the ongoing uncertainty over the outcome to the Brexit negotiations, is of considerable relevance. Realistically of course, the existing building stock and land availability does not physically disappear, but projections of demand and take-up and reallocation of use will no doubt require re-assessment during the period of the Local Spatial Plan.
- 2.7 It is important to recognise that in order for Fareham to realise its ambitions and accomplish the required employment growth and housing targets, as previously outlined in the FBC Local Plan Part 1: Core Strategy (adopted August 2011) and identified in the Local Plan Part 2: Development Sites and Policies (2015) and The Local Plan Part 3: The Welborne Plan, and subsequently supplemented, from all stakeholders, there will need to be a market focussed development strategy and adaptability in land use allocation (flexibility in planning determinations are vital to respond to occupier needs).
- 2.8 There has been and continues to be, a significant transition in land use re-allocation within the Borough and where retail and housing development has already or may supercede B class land use, an objective judgement will be required to recommend safeguarding employment sites in the future (for existing, allocated or potential site opportunities).
- 2.9 The changing nature of occupier's property requirements and the dynamics of how Fareham relates to its neighbouring sub-regional market place, are inevitably complex and will continue to be in a state of flux over the coming years due to the impact of major projected land releases and take up of development opportunities in the South Hampshire region.
- 2.10 Nevertheless, it is important to consider the wider picture as to how the land supply and perceived demand will be influenced in a sub-regional context, especially in relation to the ambitions of the PUSH and Solent LEP based strategic policies. Fareham Borough is midway along the M27 corridor and accordingly benefits from the communication links and divided labour pool from both the Southampton and Portsmouth conurbations, but conversely its land supply and resident workforce is subjected to strong competition.

2.11 In practice, neither the commercial property market nor the occupier market has little regard for Local Authority administration boundaries, and relocation decisions are weighed up and based on a combination of factors ie. road, rail and water borne access, local infrastructure capacity, workforce availability, telecoms/internet connectivity, and most importantly, the suitability, quality and availability of employment space.

2.12 In the text of this report we may refer to the following Use Classes:

- A1 Shops including travel agents, dry cleaners, food consumed off the premises.
- A2 Financial and Professional Services including banks, offices to visiting members of the public
- A3 Restaurants & Cafes – sale of food for consumption on the premises
- A4 Drinking Establishments – public house, wine bar
- A5 Hot Food Takeaway – hot food consumption off the premises, e.g. Drive Thru
- B1 (a) Offices other than A2
- B1 (b) R&D – laboratories, studios etc.
- B1 (c) Light Industrial
- B2 General Industrial
- B8 Storage and distribution including warehouse and logistics, trade.
- C1 Hotel
- C3 Residential
- D1 Non-Residential Institutions
- D2 Assembly and Leisure – gyms, sports halls, cinemas etc.

2.13 We understand, that our advice and findings are provided for both internal and external purposes and do not necessarily reflect the views of FBC. This advice does not accord within minimum reporting requirements of the RICS Valuation, Global Standards July 2017 and consequently, any financial references do not constitute a formal valuation in accordance with these standards, although the basis of any valuation adopted accords with the RICS definition of Market Value.

2.14 This instruction has been undertaken with reference to the relevant sections of the National Planning Policy Framework and the Planning Practice Guidance, and these are summarised below.

National Planning Policy Framework

2.15 The revised National Planning Policy Framework (NPPF) (“Framework”) was published in February 2019 (supplements the July 2018 guidelines) and outlines the strategic planning policies for England and how they should be applied. The NPPF must be taken into account when Local Authorities prepare the development plan, including local and neighbourhood plans.

2.16 The objective of sustainable development can be summarised as meeting the needs of the present without compromising the ability of future generations to meet their own needs. Achieving sustainable development means that the planning system has three overarching objectives:

- **an economic objective** – to help build a strong, responsive and competitive economy, by ensuring that sufficient land of the right types is available in the right places and at the right time to support growth, innovation and improved productivity; and by identifying and coordinating the provision of infrastructure;
- **a social objective** – to support strong, vibrant and healthy communities, by ensuring that a sufficient number and range of homes can be provided to meet the needs of present and future generations; and by fostering a well-designed and safe built environment, with accessible services and open spaces that reflect current and future needs and support communities’ health, social and cultural well-being; and
- **an environmental objective** – to contribute to protecting and enhancing our natural, built and historic environment; including making effective use of land, helping to improve biodiversity, using natural resources prudently, minimising waste and pollution, and mitigating and adapting to climate change, including moving to a low carbon economy.

2.17 At the heart of the NPPF is a presumption in favour of sustainable development. Paragraph 11 sets out how this should be applied in plan-making:

- a. plans should positively seek opportunities to meet the development needs of their area, and be sufficiently flexible to adapt to rapid change;
- b. strategic policies should, as a minimum, provide for objectively assessed needs for housing and other uses, as well as any needs that cannot be met within neighbouring areas, unless:
 - i. the application of policies in this Framework that protect areas or assets of particular importance provides a strong reason for restricting the overall scale, type or distribution of development in the plan area, or
 - ii. any adverse impacts of doing so would significantly and demonstrably outweigh the benefits, when assessed against the policies in this Framework taken as a whole.

2.18 In relation to the assessment of employment land the Framework, section 3 set out the policies for plan making, with paragraph 15 stating that a plan should be up-to-date and positively plan for the future addressing amongst others economic priorities. The Framework expects plans to set out on overall strategy for employment through strategic policies setting out an overall strategy for the pattern, scale and quality of development.

2.19 Strategic policies are expected to provide a clear strategy for bringing forward sufficient land to address objectively assessed need over the plan period, a minimum of 15 years. This should include allocating sites to deliver the strategic priorities.

2.20 The Framework expects planning policies to “help create the conditions in which businesses can invest, expand and adapt”¹. Through planning policies strategic sites should be identified to meet the anticipated needs over the plan period, and new ways of working need to be

¹ Paragraph 80 of the Framework.

anticipated through flexible policies with an ability to respond to changes in economic circumstances².

Planning Practice Guidance

- 2.21 The practice guidance adds further context to the Framework and it should be noted is currently in the process of being gradually updated in light of the newly published Framework.
- 2.22 The current publication under “Housing and economic land availability assessments”, sets out the methodology for undertaking an assessment to support the allocation of sites in a Local Plan and is seen as an important step in Local Plan preparation as evidence to underpin policies in housing and economic development.
- 2.23 It should be noted that this assessment, in line with the guidance, assesses the sites suitability for economic development but it is not for this assessment to allocate the sites. The development plan should determine which sites are most suitable to meet the economic (and housing) needs.
- 2.24 The PPG sets out the methodology expected to be followed in assessment of sites, with any deviation requiring explanation and justification. The overall assessment methodology outlined in the PPG has five stages:
1. identification of sites and broad locations
 2. Site/ broad location assessment
 3. Windfall assessment
 4. Assessment review
 5. Final evidence base

² Paragraph 81 of the Framework.

- 2.25 This study is to focus on the site/ broad location assessment (stage 2), and feeds into other work already undertaken by the Local Authority on employment sites in the Borough. The PPG states that the development potential of the sites is to be guided by existing or emerging plan policy. The PPG considers that the ‘development potential’ “is a significant factor that affects economic viability of a site/ broad location and its suitability for a particular use”. Paragraph 018 states that the factors of suitability, availability and achievability of sites are to be considered when considering when and whether sites/ broad locations are likely to be developed.
- 2.26 In assessing the suitability of the sites under this stage of the assessment the suitable mix of uses should be considered and this should be guided by both planning policy and the market and industry requirements with reference to that particular functional economic market area.
- 2.27 Paragraph 019 references those factors that should “be considered to assess a site’s suitability for development now or in the future”, which include physical limitations, such as flood risk, infrastructure, potential impacts on heritage, landscapes and nature, appropriateness and likely market attractiveness for the type of development proposed, the sites contribution to regeneration priorities, and any environmental/ amenity impacts that would be experienced by occupiers and neighbouring areas.
- 2.28 In considering the availability of sites the PPG expects the assessment of sites to be based on the best possible information available, to determine if there are any issues with ownership or legal problems, such as ransom strips. Where issues are identified the assessment should consider how these can be overcome. The achievability of a site includes assessing its viability. The PPG considers a site to be achievable for development if “there is a reasonable prospect that the particular type of development will be developed on the site at a particular point in time” and is focussed on the viability of the site and the capacity of the developer to sell/ let the development over a certain period.

- 2.29 The assessment process in the PPG goes on to consider windfall sites, and bringing all the site information together in a review to produce an indicative trajectories for the market area identifying the quantum of development (housing and economic development) that can be provided.
- 2.30 This Employment Land Study feeds into this wider assessment process, aiding the Local Authority in decision making through the Local Plan process in identifying those sites for economic development that area suitable, available and achievable.

3.0 SOUTH HAMPSHIRE MARKET OVERVIEW

General

- 3.1 The current national and global financial uncertainties, notably the impact and result of the ongoing Brexit negotiations, fluctuating global oil prices and retail failures, may prove to have a negative effect on the UK and regional economy in the near future. However despite this, recent data (and our own market engagement), shows that there has been a continued fall in unemployment levels and we perceive business confidence in the Solent area had been positive during the course of 2018 and generally maintained into 2019.
- 3.2 We have seen sustained growth in occupier demand over the last four years. This indicator of economic resurgence has generated an increase in headline rents and falling tenant's incentives. In turn, this has supported and prompted the rationale for new development activity. Funding institutions have become increasingly more confident in the South Coast market and accordingly been proactive in the speculative development of industrial and logistics schemes, with several schemes either let, built and available to let, or under construction, with further developments in the pipeline. These include Test Lane South at Nursling, Alpha Park in Chandlers Ford, Dunsbury Park, Velocity and Hermitage Park in Havant, Mountpark at Eastleigh, Merlin Park and Pioneer Park in Portsmouth, Waterloo Park and Proxima Park in Waterlooville. Moreover at Kites Croft Titchfield, two speculative new units of some 929 and 2787 sq m funded by Aviva Investors were successfully completed and now occupied. At J9 South on Cartwright Drive, a new 3,716 sq m headquarters building is nearing completion to local business Percival Aviation for production and office use.
- 3.3 Generally in the industrial and logistics sector, e-tailers particularly in the non-food sectors, have been a major demand driver. This take up, combined with a lack of development, has seen availability reach an all-time low, and especially in key motorway locations this shortage will increasingly frustrate business expansion and relocation. In turn this has placed pressure on the available stock of employment sites, and whilst say Welborne in the Borough will

present a significant contribution over time, the immediate supply of land is severely restricted. The opportunity for occupiers to acquire new premises at the Solent Enterprise Zone Daedalus East is proving reasonably successful and interest and take up here has been predominantly by local businesses relocating to retain staff, even though it is some distance from the motorway – one determining factor here is that the planning conditions insist on occupiers be involved in aviation, marine or advanced technology/engineering industries.

- 3.4 In prime office locations along the M27/M3 Corridors, new-build schemes are on the horizon and these include Lakeside at Northarbour, Portsmouth to the east, Royal Pier Waterfront and Station Quarter in Southampton, Solent Business Park at Whiteley and the Chilcomb Centre and Station Approach proposals in Winchester. Although at present, risk adverse pre-lets will be required to stimulate development at these locations. At the Southampton Science Park and Phase 2 of the Innovation Centre at Daedalus however, offices have been speculatively built owing to the vindication and confidence that full occupancy generates. In more secondary office locations, such as Fareham Town Centre there will continue to be an occupier and investor resistance to attracting new B1a development, as residual land values and weak demand struggle to support such new build schemes.
- 3.5 This future office supply pipeline is driven by a number of factors and a reduction in the existing stock should, in theory, encourage the promotion of new development subject to the calibre of demand. There is growth in sectors such as hotel and student accommodation in Southampton, Portsmouth and Winchester, along with permitted development conversions to residential, and these will have a significant impact on the office supply of both existing buildings and potential sites – outside of the Cities and Town Centres there are less constraints and sites are more readily available for office use. However attracting office occupiers to new locations without an existing critical building mass and a deficiency of staff amenity, is difficult. The crucial drivers to stimulate and access development funding are the

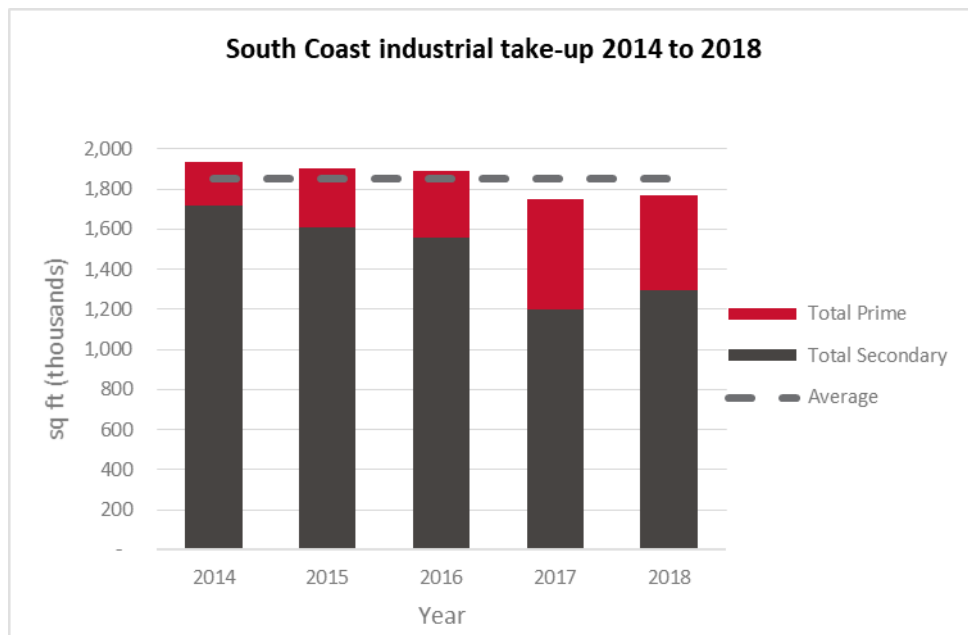
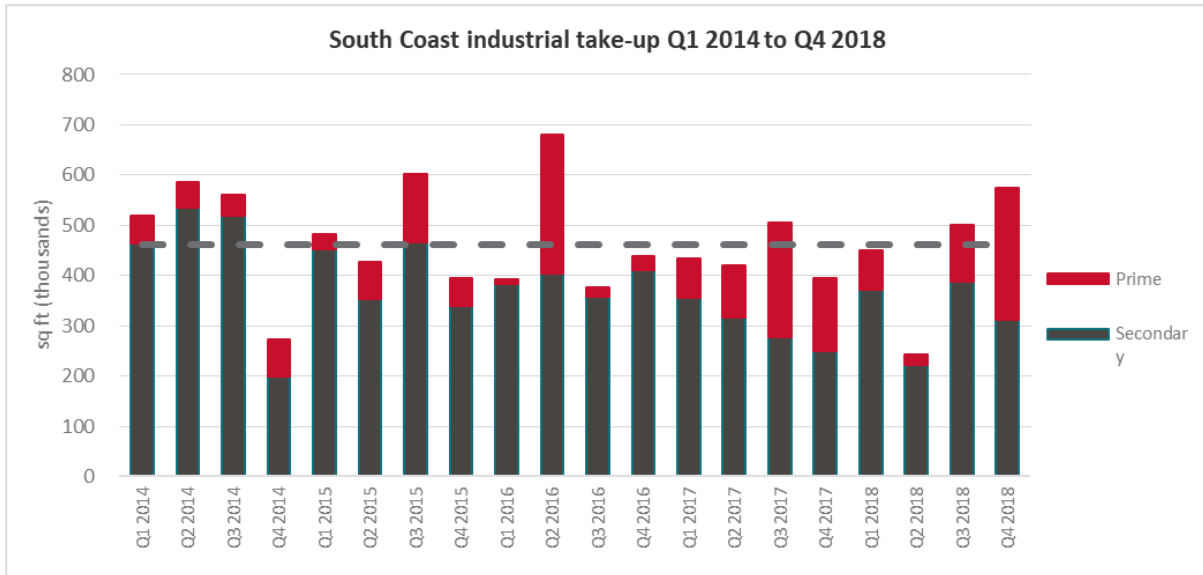
supporting evidence that viable rental levels can be achieved and that there is a quantum and credible level of occupier demand to afford new office space. Often not an easy task.

South Hampshire Industrial Market

- 3.6 The South Coast is continuing to experience a heightened level of occupier and investor activity post-recession. However, this strong and steady demand has been hampered by the critical lack of built supply which has impacted across all size ranges. This has resulted in the South Coast experiencing a shortage of good quality, modern, detached industrial and logistics units, as a negligible amount of development had taken place over the last 5 to 10 years.
- 3.7 We contend that demand has virtually outstripped the supply of both prime and modern secondary units in the region across most unit size ranges. With regard to older stock, gradually these are being replaced where the viability adds up however there is still scope in the market for these lower specification units to perform a function for businesses who may not be able to afford the higher rents associated with the Grade A or modern premises.
- 3.8 We recognised that during 2018 the churn in the market had begun to slow down as occupiers struggled to identify suitable premises to move to and this will continue until the construction and take up of new development schemes are completed thus releasing secondhand stock into the market (to qualify our assertion the take up figures remain consistent with previous years but are reinforced by a number of larger individual transactions, notably at Mountpark). As a result, the opportunity for businesses to expand has been restricted, particularly in terms of small freehold unit schemes in good, strategic locations or low density type users requiring open storage land, transport depots etc. The expected take-up of pre-let opportunities by larger companies should in theory release a stock of buildings into the market which will help soak up this latent demand but will not be adequate to satisfy the overall quantity of occupier requirements.

- 3.9 The shortage of secondary and tertiary grade stock in the market is restricting the availability of second hand premises to incoming occupiers, for example the tertiary grade Fort Wallington Industrial Estate on Military Road, Pinks Hill, has maintained virtually 100% occupancy for over 12 months (which in our dealings with the Estate has never been repeated). The last available unit, H & J of 1,900 sq m (20,454 sq ft) has now been let to Ao.com, the white goods delivery e-tailer at a rent of £6 per sq ft on a new lease.
- 3.10 A number of the multi-let industrial estates are fulfilling higher occupancy rates with accompanied rental growth. It is anticipated that the 'knock-on' effect of this will be as previously remarked, that the region will continue to see an increase in the planning and delivery of speculative development during the course of this year and into next.
- 3.11 At the end of 2017, the Region's annual take-up reduced from 175 465 sq m in 2016 to 162 632 sq m (-7.5% less) – the prime take-up in 2017 increased by 51 280 sq m from 2016 (+65%). The 2017 secondary take-up decreased from 2016 to 111 351 sq m (-22% less).
- 3.12 The corresponding analysis for 2018 indicates annual take up overall increased by some 16 815 sq m (+ 46%) – prime increased by 11 056 sq m (+83%) not surprisingly and secondary stock take up also rose by 5758 sq m (+24.75%).
- 3.13 In Q1 2018 we witnessed a positive start to the year with an increase of approximately 14% in overall take up when compared with Q4 2017. This trend had dropped in Q2 however, and this can largely be attributed to a number of larger transactions that were under offer but not yet completed (totalling approximately 51 096 sq m). We recorded a significant number of transactions completing in Quarters 3 and 4, readdressing the drop in figures in Q2. So earlier in the year, take up was primarily involving secondary stock, as occupiers took refurbished space and remained cost conscious to satisfy contract led, tight timescales. We anticipated this weighting would shift towards prime stock as the year progressed as the new speculative

units and pre-let units came on stream and occupiers obtained possession. This proved correct.



3.14 In certain locations (generally where there is a non-conforming use or in a mixed use area on the fringe of commercial activity) the existing older stock with an established industrial use, will increasingly be under pressure to be redeveloped for residential or alternative employment uses, as higher land values will almost certainly be more attractive to the freehold owner/developer. This tension between the delivery of housing growth targets in the

PUSH region and at the same time safeguarding employment space, must be carefully adjudicated and each individual site evaluated on its own merits.

- 3.15 Availability at the end of Q4 2018 was some 264 596 m sq m within the Portsmouth and Southampton conurbations which we estimate represents only some 19 months' supply, based on the average annual take up over the last 5 years which reflects periods of high and low activity as the market emerged from the 2008 onwards recession. The 5 year analysis shows a dip from 2014 to 2016 followed by stepped increases in both 2017 and 2018.
- 3.16 We consider some 83 529 sq m (31%) can be regarded as prime space in a local context though a large element of this would not conform to the property industry's definition of Grade A industrial space, which is – plot densities up to 45/50% depending on the size and nature of use; environmentally compliant and energy efficient buildings; minimum eaves heights for units up to 1858 sq m of 6.5m, rising to 7.5m for buildings between 1858 and 4645 sq m and higher (10 to 12m plus) for units over 4645 sq m; typical office content of 10/15% with raised floors and cooling; secure site; adequate dock and/or grade level loading with larger occupiers requiring separate office parking to yard and loading areas; attractive and modern design; defined service capacities inc sufficient kVa power supply; accessible location for staff and commercial vehicles etc. Moreover, a large amount of modern industrial units which become available are specially built for logistics and distribution and these units which incorporate dock levellers and higher eaves, are inefficient or too costly for many B2 purposes.
- 3.17 The lack of stock had been evident in the medium and larger unit categories (above 929 sq m) up to 24 months ago however this is now set to improve as the availability of prime and secondary floor space increases and take up as take up falls below the 5 year average. Without a steady market churn, demand tails off as occupiers recognise that a search for new premises will be a frustrating process. Typically, smaller businesses have also struggled to identify suitable alternative premises as the shortage of supply has impacted across this size

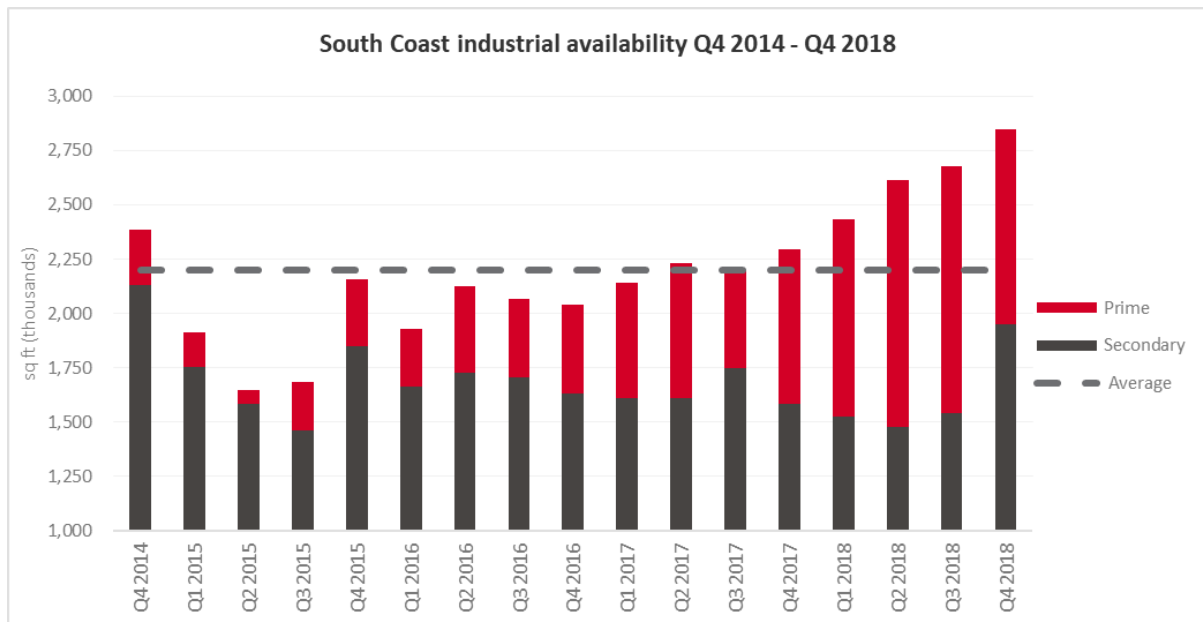
range, with most estates experiencing very low void rates and rising rents, as can be seen by virtually full occupancy in Phases 1 and 2 at Daedalus Park.

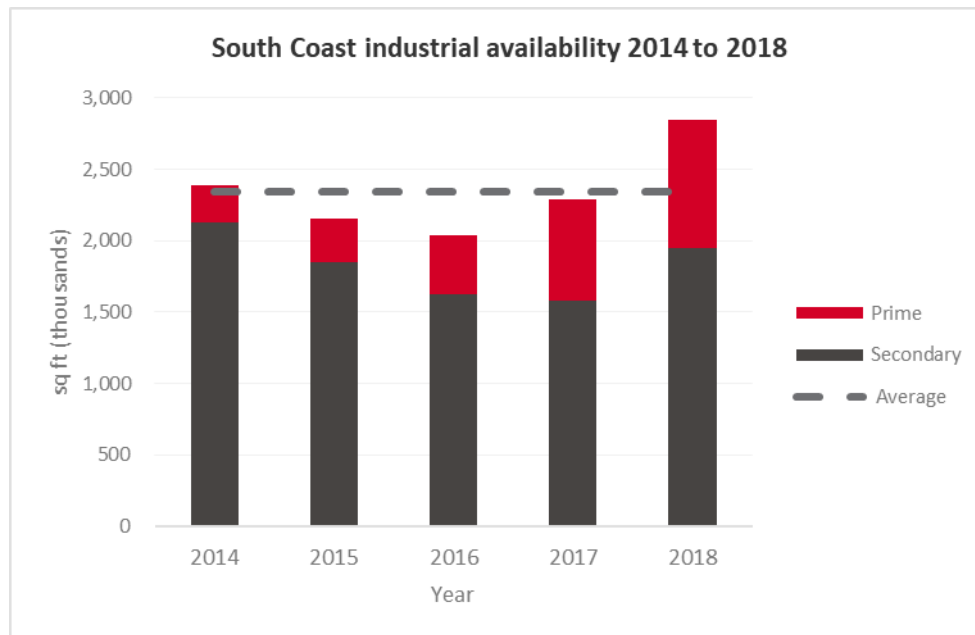
- 3.18 As a direct result of new speculative developments coming out of the ground, availability in 2018 notably increased when compared with the five year average. Total stock in the Region at the end of Q4 2018 was 264 596 sq m, denoting a small increase of 15 964 sq m (+6.5%) on the previous quarter, or an increase of 51 533 sq m (+24%) against Q4 2017.
- 3.19 Supply of prime stock decreased during Q4 2018 to 83 529 sq m, a fall of 21 841 sq m (+21%) on the previous quarter as take up latched onto the new schemes, however year on year there was an increase in Q4 2018 of 17 578 sq m (+26.5%) against Q4 2017.
- 3.20 In contrast, the supply of secondary stock markedly increased in Q4 2018, by 37 805 sq m (+26%) on the previous quarter and 33 955 sq m (+23%) against Q4 2017. This rising trend has continued over a number of years as secondary stock has now reached its highest level since 2014, though in Q2 2018 availability fell to only 13 735 sq m thus suggesting that secondhand market activity had slowed down together with more stock being released.
- 3.21 At the outset of 2019, we expect to see the supply of prime stock continue to rise as the current development pipeline bears fruition, schemes such as Merlin Park, Portsmouth (8457 sq m) has now completed and new developments at Velocity and Hermitage in Havant for instance, are nearing completion to attract occupiers. As for secondary stock, we anticipate a continued gradual increase in second hand availability as tenants relocate or downsize and the Brexit impact takes effect which may well reduce market churn.
- 3.22 One immediate question is, will the level of stock being released into the market from development activity be sufficient to meet demand? In the short to medium term this appears unlikely and accordingly we assess the occupational market to remain competitive over the next 5 years' subject to the inevitable and unpredictable caveat, as to how the economy

performs. Take-up in Q4 2018 was some 53 419 sq m and annually totalled approximately 164 284 sq m, which significantly was some 46% above 2017 and comfortably above the five (and ten year) quarterly average. The relevance here is that prime take up increased remarkably from Q4 2017 by 83% and that secondary take up increased by a more modest 24.75% from the previous year. We suggest these impressive prime take up levels are unlikely to be repeated this year but will be close.

- 3.23 The reduction in supply had enabled landlords to promote and achieve higher rents, particularly on good quality second hand units with self-contained yards, and this coupled with the weight of market evidence has supported record prime and pre-let rental levels across the region. If the availability increases, particularly of secondary stock, as it appears to be then this will dampen rents and strengthen tenants negotiating position.
- 3.24 In some popular, more desirable locations we projected that prime rents on units above 1858 sq m would increase to circa £9.50 to £10.50 per sq ft which is proving accurate, though whether this will be sustained as more space becomes available remains to be seen.
- 3.25 In terms of rent free incentives or equivalent, during the course of 2018 these have averaged 6 to 9 months on a five year term, to 12 months for a straight 10 year term. We have also witnessed an increase in the number of occupiers willing to sign up to leases in of ten years to secure space. Again, this has given developers and institutions the confidence to compete and commit to land acquisitions and purchase running investments on the South Coast.
- 3.26 It is worth noting that labour and build costs have markedly increased which has impacted on development appraisal viability and reflected in higher rents being required to support a profitable outcome and to justify competition driven, higher land values... This factor has been mitigated to a large degree by yield compression improving the resultant capital values and we observe that owner-occupiers are expected and willing to pay significantly higher property values than those seen post-recession, particularly on smaller unit schemes.

3.27 Our summary is that industrial occupiers looking to move have been frustrated at the lack of availability of secondary or sub-prime stock across the Solent region, due to both heightened demand and the limited new supply coming onto the market. The rate of market churn had tightened up, higher rents have become established for better quality stock and the number of relocation options to existing building have been limited or virtually non-existent. This picture is changing and the supply versus demand imbalance we foresee will begin to ease during 2019.





3.28 A summary of key developments along the M27 corridor are listed below:

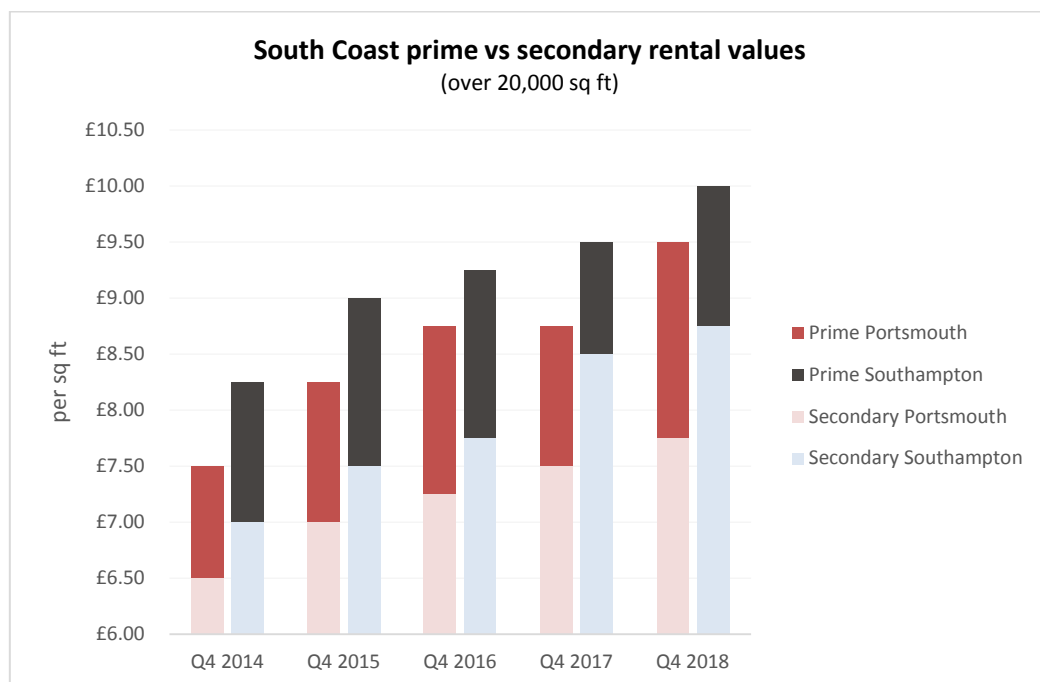
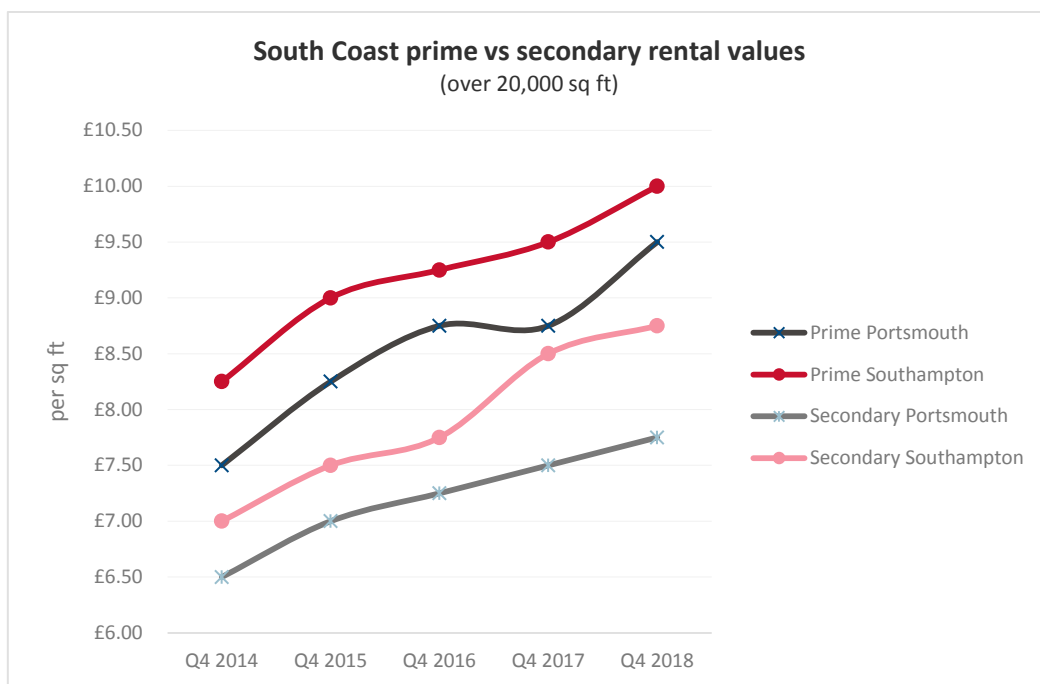
- Canmoor's speculative development of Merlin Park in Portsmouth is out of the ground and provides 8457 sq m of prime industrial and logistics space across seven units. Construction of the scheme completed in August 2018 and at present, three units remain available to let.
- Fareham Borough Council has invested and constructed six new Business hangars on its scheme at Solent Airport, Daedalus, Lee-on-the-Solent, five of which are now let or under offer and four of the five GA Club hangars are occupied...
- Construction of Bericote Properties' speculative scheme, Alpha Park at Chandlers Ford, funded by Blackrock, has completed. Unit 1 has been successfully pre-let to DX Network Services and there is significant interest in the remaining two units of 4180 and 7804 sq m, respectively.
- At Peel Logistics' new development, South Central in Nursling, financed by Rockspring, John Lewis has taken a pre-let of Unit 3, with the other two units of 3623 sq m (under offer) and 10 869 sq m remaining.

- Following the development of Phase 1, at Mountpark Logistics' new scheme on the former Ford site at Wide Lane, Eastleigh, Mountpark acquired a further 9.7 acres on the adjacent site. Phase 2 comprises four units, ranging from 6270 to 9934 sq m, and was completed in October 2018 (two units have been let and one unit is currently under offer).
- The last remaining site at the highly successful Hamilton Business Park in Hedge End, Southampton, had been speculatively developed by Hargreaves Properties, resulting in a detached 2300 sq m high spec industrial/warehouse unit which has been let to DSV Logistics.
- Salmon Developments/LIM purchased the final plot at Harts Farm Way Havant and has speculatively built four units at Hermitage Park, available on new leases totalling approx. 3,000 sq m which are currently on the market.
- Proxima Park in Waterlooville is under construction and will provide 20 units ranging from 400 to 1600 sq m and have also achieved a pre let to Coopers Fire of Havant of some 4200 sq m
- The three unit scheme at Velocity New lane Havant developed by Taurus/LaSalle totalling 12 500 sq m was completed 12 months ago and is currently still available.
- Kier at Logistics City Whiteley are about to commence on site with a 3 unit B2/B8 development with unit sizes of 805, 2110 and 2535 sq m with occupation scheduled for Q2 2020.

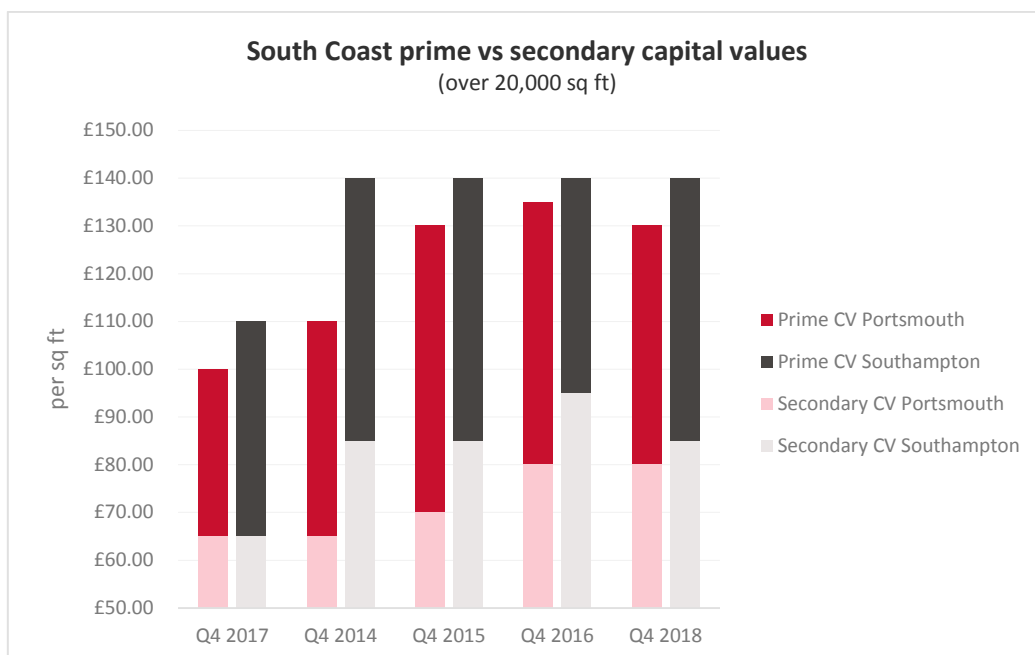
3.29 Rental levels were continuing to marginally increase during 2018 and we witnessed a double-digit rent of £10 psf headline on the South Coast for a new spec unit at Alpha Park on a letting of 4180 sq m. However at the midpoint in 2019, we consider that rents have plateaued and with a few exceptions, are unlikely to continue to rise.

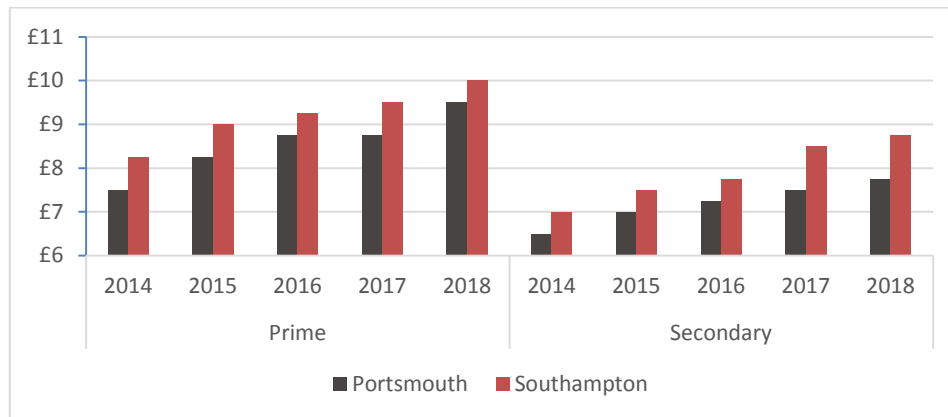
3.30 During 2017 and 2018 the reduction in supply of secondary stock had also enabled landlords to promote and achieve higher rents, particularly on good quality second hand units with self-

contained yards. This had the effect of reducing the rental gap between prime and secondary stock due to the lack of secondary space available, however we may now see the gap beginning to widen again. We anticipate landlords will continue to be inclined to refurbish the poorer grade stock to compete with the new grade A space.



3.31 Freehold properties remain in hot demand and we anticipate that capital values will continue to increase across all size ranges and locations in 2018, as owner-occupiers, in particular, search for their own properties, rather than paying increasing rents. We have witnessed a shortage of freehold opportunities on the South Coast and often result in best bids due to the high demand. As a result we have seen a rise in capital values for example a business unit at Fulcrum, Whiteley of some 500 sq m sold for over £140 per sq ft and at the Segensworth Business Centre a unit of 275 sq m sold for £134 per sq ft. The pre sale to Percival Aviation achieved a capital value approaching £140 per sq ft.





3.32 We expect these rental trends established from 2015 to 2018 to consolidate over the forthcoming year. A summary of present day industrial rents and capital values in the Solent region are provided below:

Under 5,000 sq ft	Prime capital value per sq ft	Prime headline rent per sq ft	Secondary capital value per sq ft	Secondary headline rent per sq ft
Fareham, Portsmouth and Havant	£135 - £145	£10.00 - £11.00	£90 - £120	£8.50 - £9.50
Southampton and Eastleigh	£150 - £160	£12.00	£90 - £125	£10.00

5,000 – 20,000 sq ft	Prime capital value per sq ft	Prime headline rent per sq ft	Secondary capital value per sq ft	Secondary headline rent per sq ft
Fareham, Portsmouth and Havant	£125 - £135	£9.75	£70 - £100	£7.50 - £8.50
Southampton and Eastleigh	£130 - £140	£9.50	£80 - £110	£9.00

Over 20,000 sq ft	Prime capital value per sq ft	Prime headline rent per sq ft	Secondary capital value per sq ft	Secondary headline rent per sq ft
Fareham, Portsmouth and Havant	£110 - £130	£9.50	£70 - £80	£7.00 - £8.25
Southampton and Eastleigh	£115 - £140	£10.00	£75 - £85	£8.00 - £8.75

- 3.33 As property owners (private and institutional alike) have generally little or no motive to dispose of assets and so to retain rental income, transactions in the market have been predominantly lettings rather than freehold sales. We are aware that many small businesses, given the opportunity, would prefer to buy and invest in their own premises.
- 3.34 The investment market along the South Coast continues to be 'hot property', with consistent levels of competition seen for all product types. Prime industrial yields now stand at approximately 4.5%. With opportunities in the region being far and few between and investors attracted to the strong occupational market dynamics, the outlook over the coming year is set to continue positively with strong demand and little product available.
- 3.35 Despite a subdued first quarter, the remainder of 2018 saw transactional volume for the South Coast industrial exceed circa £200m. The headline transactions included LaSalle (Greater Manchester Pension Fund) acquiring South Central, Nursling (part of the Sovereign Portfolio), M&G Real Estate purchasing Mountpark Southampton (again being part of a larger portfolio sale) and Aberdeen Standard acquiring the multi let, roadside Fareham Business Park for around £36m. Other activity of note was the sale of the Quadrangle Industrial Estate, Romsey, acquired by CBRE Global Investors from LaSalle Investment Management for £18,025,000 reflecting a NIY of 4.55%. The estate comprised a 12 unit multi-let scheme let to 9 tenants with an AWULT to break of 3 years. The table below highlights the fall (resulting in higher capital values) in industrial investment yields in the Region. During 2019 so far, we observe that investors have become more discerning and reluctant to force yields down any further as the economic outlook and Brexit uncertainty becomes closer.
- 3.36 In order to promote and sustain the current wave of development momentum in the Solent region, the rationale to justify significant investment and speculate is dependent on market rents, capitalisation yields and predicted void rates being maintained at the same level. The

groundswell of occupiers have adjusted to bearing higher rental costs in line with the market trajectory and we foresee this benchmark is now set for the future.

<i>Yields</i>	Prime single lets	Secondary single lets	Prime multi-lets	Secondary multi-lets
2019	4.25 – 4.5%	4.75 – 5.5%	4.5 – 4.75%	5 – 5.75%
2018	4.25%-4.5%	4.75%-5.5%	4.25%-4.75%	4.75%-5.75%
2017	4.5%-5.0%	5.0%-5.75%	5.0% 5.5%	6%-6.25%
2016	5%-5.5%	6.5%-7.5%	5.5%-6%	6.75%-7.5%
2015	5.75%-6.25%	7%-7.5%	5.75%-6.25%	6.5%-7.5%
2014	6%-6.5%	7.25%-8%	5.75%-6.25%	7%-8%

South Coast Office Market

3.37 The South Hampshire regional office market had a challenging start to 2018 with the lowest quarter take-up (Q1 2535 sq m) recorded in the last 5 years. Activity improved in Q2 as the number of transactions increased, with Quarters 3 and 4 representing over 70% of the total year’s take up. CheckTrade occupied the largest footprint at Lakeside in a 771 sq m letting of Grade A space. The average deal size was under 446 sq m reflecting the continued trend towards occupiers using space more efficiently and taking smaller floorplates.

3.38 Office availability along the M27 corridor has continued its downward trend and fell below 1 million sq ft (92 902 sq m) to 869 329 sq ft (80 762 sq m) for the second concurrent year – Q4 2017 recorded a supply of some 91 819 sq m which was 24% down compared to the end of 2016 and from Q4 2016 to Q4 2018, the fall has been 33%. We historically recall that 10 years ago there was over 2 million sq ft of availability, albeit at the advent of a recession. The greatest decline in availability is in the Cities and Town Centres which have seen a 30% drop, as opposed to out of town stock falling 19%. Grade A supply at the end of 2018 stands at 24 701sq m (30%) Grade B totals 42 797 sq m (53%) and Grade C stock stood at some 13 265 sq m (16%) – the level of Grade B quality results predominantly from refurbishment of existing office stock. Interestingly there is a higher proportion of Grade A stock in the City Centres than Grades B and C and overall, the ‘In Town’ office stock represents 38 % of availability in

comparison to 62% 'Out of Town' such as the Solent Business Park at Whiteley or Lakeside at Portsmouth.

- 3.39 This trend of reduced supply in conventional office space is set to continue and as demand is relatively static, Grades A & B office rents along the M27 corridor have only marginally increased. As supply tightens further, in prime locations rents may continue to rise, and tenant incentives will be eroded in the short to medium term. Conversely, the serviced office market (including enterprise/innovation centres etc) has experienced strong demand, often replacing occupiers need for traditional floor space and willingness to pay higher overheads in exchange for flexibility and shorter lease commitments.
- 3.40 Notable relocations into brand new office accommodation have historically been on a pre-let/forward funded basis and in the last decade with one exception, all the major office transactions have occurred west of Junction 9 of the M27. For example:
- Raymarine (now Pall Europe) in Cosham – 80,000 sq ft (7432 sq m) pre-let at £19.50, occupied in 2008;
 - Carnival – 160,000 sq ft (14,864 sq m) pre-let, confidentiality agreement in place, however rent believed to be circa £19, occupied in 2009;
 - Maritime & Coastguard Agency, Southampton City – 66,500 sq ft (6,178 sq m) pre-let at £19.20, occupied in 2007;
 - B&Q at Chandlers Ford – 150,000 sq ft (13,935 sq m) owner occupied in 2011;
 - Ordnance Survey at Nursling – 150,00 sq ft (13,935 sq m) pre-let, confidentiality agreement in place, rent unknown, occupied in 2011;
 - Selex Galileo at Endeavour Park, Millbrook – 24,000 sq ft (2,229 sq m) on a 16 year lease at a rent equating to £18 per sq ft and 18 months' rent free (NB: industrial location) occupation June 2014;

- Phase II National Air Traffic Control Centre, Solent Business Park, Whiteley – 130,400 sq ft (12,114 sq m).

3.41 There continues to be polarised activity at the two principal out of town office locations, namely Solent Business Park at Whiteley and Lakeside at Portsmouth where the majority of supply is concentrated and inevitably occupier demand graduates. It is worth restating that over many years the provision of new Out of Town development elsewhere across the Solent region has been isolated. We estimate that only some 10 000 sq m of new B1a office space has been delivered in Fareham Borough over the last 20 years – will this trend dramatically turn around over the next 20 years - Cams Hall Estate and Segensworth have provided the bulk of the office supply.

3.42 With availability continuing to fall and with limited new development in the pipeline, the relocation options for businesses are narrowing. Rents have witnessed an increase and in prime locations may continue to rise and incentives offered to tenants are reducing. These factors are pointing towards the potential for profitable new development, stimulated in prime locations; for example Chilcomb Park in Winchester will offer 1937 sq m of new office accommodation which is due to complete this year. At Nelson Gate in Southampton, there will be a 1906 sq m new build and 2161 sq m being brought back to Grade A specification and there is a pre sale agreed at the Chilworth Science Park of 1672 sq m. There are rumours that Eastleigh Borough Council are in talks to agree a substantial 5574 sq m pre-let on its Leigh Road site with Aviva Healthcare.

3.43 We may see the pre-let market return, where headline rents at or above £25 per sq ft are required in order to justify new development in prime locations however there are a limited number of occupiers in this market. We do believe that a strategic planning vision should identify and promote new site opportunities to attract a prospective office based employer of the right size and calibre.

- 3.44 Overall, in 2018 take-up for the South Coast office market recovered following a positive second half and finished with some 24 230 sq m transacted across 46 deals. This represented a decrease of 11% from 2017 and similarly a 11% decrease in take up from 2016 to 2017. Despite the strong finish to the year, this represented a 14% fall below the 10 year average take-up figure (2008-2017) of 31 382 sq m.
- 3.45 The out of town market (M27/A27 corridor) saw the greatest take-up (67%) with the main hotspot being around J9 M27 accounting for six out of the sixteen transactions in Q4. The most active sectors were Construction and Engineering (34%) followed by Pharmaceutical Medical and Healthcare (20%) Energy Media & Telecoms (13%) and Finance, Banking & Insurance (9%) and Others accounted for 22%.
- 3.46 During 2018 the trend continued of lower demand for the traditional smaller office space. In Q4, 45% of all enquiries were for space less than 929 sq m and this was replicated throughout 2017 where 53% of all enquiries were for this lower size bracket. This compares to 67% in 2015 and 63% in 2016. In general, office applicant enquiries for 2018 were 14% higher than recorded in 2017 which is at odds with the fall in take up – we suspect a good number of enquiries eventually decided to occupy serviced space or embraced hot desking (or the onset of Brexit and business uncertainty have put relocations on hold).
- 3.47 New headline rents were achieved in a number of marketplaces across the South Coast region during 2017 and have been maintained into 2018. The highest achieved rent in Southampton City Centre was £22 per sq ft at the White Building in Cumberland Place. By comparison, the out of town office market at 1000 Lakeside, Portsmouth achieved £21.50 per sq ft. Southampton Science Park achieved £25 per sq ft at its new build office on the Benham Campus. Trafalgar House in Winchester City Centre achieved a new headline rent for the City achieving £29.25 per sq ft, subject to a comprehensive refurbishment including Cat B works.

- 3.48 Concurrently, tenant incentives for open market lettings have reduced. Where previously an 18 month rent-free period was typically offered for a 5-year term certain, this has now fallen to circa 6 to 12 months in the current market.
- 3.49 In the medium term, and assuming current economic conditions remain reasonably buoyant, we can expect to see prime rents being maintained at above £20 per sq ft where the optimum supply and demand dynamics prevail. In the primary office locations, where there is a particular shortage of accommodation such as Winchester, we anticipate further scope for new development in the Region, and would include out of town locations with motorway accessibility, science parks/innovation centres or in prime City Centre destinations, which are close to public transport linkage or potentially part of a mixed use scheme.

4.0 FAREHAM BOROUGH OVERVIEW

General

- 4.1 The resident population of Fareham Borough is approximately 116,200 (2017 Office for National Statistics estimates) and supplies 47% of the employment within the Borough, drawing on nearby settlements such as Stubbington, Portchester, Fareham Town, Titchfield, Warsash, Locks Heath and of course the catchment extends to the Gosport/Lee-on-Solent peninsular. The Fareham urban area has grown significantly during and since the 1960's, (the Borough was formed in 1974) particularly the housing stock, largely acting as a dormitory town to the greater Portsmouth and Southampton conurbations in addition to out-commuting to the wider South of England region. It provides a typical range of urban services (shopping, educational, leisure and recreational amenities) commensurate with a town of its size and contains some 700 000 sq m of industrial and office based employment workspace (the approximate breakdown is 23% B1a to 77% B2/B8 floorspace).

Geographically

- 4.2 We have observed over many years that the traditional nature of the Fareham employment market has been a moderate churn of predominantly indigenous demand in the mainly sub 250 sq m sized unit category, or larger units in excess of 2000 sq m, interspersed with bouts of occupier activity prompted by the provision of new floor space. Thus vacant property void rates suffer marginally below average void periods in the region (in comparison to say, Gosport or Portsmouth) and in our agency capacity conducting marketing campaigns on many industrial and warehouse properties in the Borough, they have often proved effective in attracting new business occupiers from outside the local area. Clearly the positive impact of the economic recovery has stimulated occupier demand to relocate to larger/more efficient, and better quality premises. Predominantly it is a lease event (tenant's option to break, lease expiry or lease renewal negotiations with a current landlord) which prompts a property search and enquiry, though this can result in the company staying in its existing building.

- 4.3 The provision of new employment land on the horizon draws comparison with the 1985 -1995 period, when the Segensworth Estates and to a lesser extent Newgate Lane, experienced a phase of significant development activity. These virgin sites and the new estate infrastructure close to the motorway proved attractive to companies who could either move to new ready built accommodation or build to their own specific criteria, to satisfy their business space requirements and aspirations. The relevance and determining factor here was that, (given the right economic circumstances to encourage and facilitate companies to relocate), it is vital that there is a real availability of well accessed and serviced land for development, in a modern business-like environment. This is the ambition for the Solent EZ at Daedalus and in due course, the major employment potential at Welborne adjacent to J10 of the M27.

Historical Context

- 4.4 In order to assess how industrial market demand/supply trends may perform in the future, it is important to analyse how the trends have developed historically in a regional context and then to draw comparisons within South East Hampshire and specifically the Fareham marketplace.
- 4.5 Typically across South Hampshire, the industrial market (often defined by B2/B8 occupation but including B1(b) & (c) R&D and light industrial uses) has over the last 5 years or so, experienced a rise in occupier demand and diminishing supply of employment floor space. Within the Borough we estimate there has been a decrease in industrial stock availability from the beginning of 2013 to the present time of 14%. The Fareham office market, by comparison, has remained relatively static with only a slight increase in stock, displaying moderate take-up and therefore surplus suites and buildings have been remaining available for relatively longer void periods. We contend that the modest level of office market activity in Fareham Borough is both a quality issue and one of unpredictable demand (activity is generally confined to Cams Hall or located in close proximity to the motorway). Clearly there is a short commute for Fareham residents to travel to work to the Solent Business Park which attracts high levels of employment.

4.6 The overall quantum of industrial stock in the Borough has decreased over the past 5 years with marginally more B1c/B2 floorspace occupied than for B8 use. This is due to a combination of higher take up rates and lack of replacement stock or new development activity. At present, we calculate there is approximately 29 030 sq m (312 475 sq ft) of built industrial and warehouse stock, predominantly of secondary quality, currently available in the Fareham Borough district which is higher than in recent years but is distorted by the availability of two units of over 6503 sq m (70 000 sq ft) this represents a very low level of standing stock. The 5 year average has been some 42969 sq m. The spatial distribution and size range of the available built floor space is evenly spread up to 1,858 sq m (20,000 sq ft). Notably in the context of this report, Grade A space or even units of a modern quality specification represent less than 22% of the availability. However there is a significant quantity of employment land available in the pipeline for new development (predominantly at Daedalus and Welborne) with the prospect of a number of smaller sites elsewhere on the horizon. There have been just five new B2/B8 unit schemes of various sizes developed in the Borough over the last decade, in response to market demand by potential leasehold occupiers or owner occupation (often by way of SIPPS purchasers which subsequently fell away). The take-up was evidentially slow and we understand proved initially unprofitable to the developers – the medium to longer term return would have been positive. This demonstrates that at the ‘wrong time’ in the economic cycle, even when modern quality industrial stock is available, there can be inadequate demand to readily take-up the built floor space.

4.7 Since emerging from the downturn in 2014, the average take-up rate for built industrial space in Fareham has been some 25,000 sq m (269,000 sq ft) per annum approx and thus with the current availability standing at around 28 335 sq m (305,000 sq ft), we calculate that there is less than 14 months existing secondhand supply. If one excluded the two much larger units, the current availability would correspond to only 7 months’ supply. The total take up in 2018 equated to some 31 300 sq m (337,000 sq ft) which we consider is the highest level in the Borough for over a decade.

4.8 We have avoided reconciliation with the estimated new floorspace requirements projected by PUSH, and previous Local Plan targets, and have concentrated on forecasting our own delivery and take up in the Borough to 2036, based on our market knowledge and research (with consideration of the regional land supply competition elsewhere). The PUSH forecasts are simply modelled from theoretical job growth, are based on future sector by sector occupational trends, then applying job densities to predict the floorspace requirements for each Authority in the PUSH Region. We understand that to achieve the economic growth targets asserted by the Solent LEP, this will require new jobs and in turn the provision of additional B class employment space. The key question is whether the floorspace projections are realistic and if so, is there sufficient employment land available and suitably attractive to the market to accommodate this need.

4.9 In Appendix 2 we have compiled a list of the existing industrial and office sites within the Borough and graded them accordingly to assess marketability and occupier appeal. The principal locations are as follows:

Key Industrial Estates:

- Brunel Way/Mitchell Close/Concorde Way/Barnes Wallis Road
- Fulcrum
- Matrix Park/IO Centre, Cartwright Drive
- Segensworth Industrial Estates
- Fort Wallington Industrial Estate
- Enterprise Park
- Fareham Industrial Park
- Pennant Park
- Kites Croft, Titchfield
- Palmerston Business Park
- Newgate Lane/Davis Way/Palmerston Business Park

- Castle Trading Estate/Murrills Industrial Estate, Portchester
- Premier Business Centre
- Speedfields Park / Solent Gate
- Fareham Business Park
- Solent Enterprise Zone/Daedalus & Faraday Business Park

The table below details occupier transactions in the Fareham industrial market during the last 18 months.

ADDRESS	OCCUPIER	LANDLORD / VENDOR	SQ FT	TENURE	£ PER SQ FT
Unit 2 iO Centre	Anglian Windows Limited	Forelle Estates Limited	16,714	New 10 year lease	£8
Unit 3 Trilogy	Ceva Logistics Limited	Standard Life Investments	42,760	New 10 year lease	£8.50
Unit 10 Kites Croft	SMI Group Limited	Aviva Investors	30,558	New 15 year lease	£8.50
Unit 25 Fareham Industrial Park	Arenko	Standard Life Investments	15,438	New 15 year lease	£7
Faraday Business Park, Daedalus	Proptech Portsmouth Limited	Fareham Borough Council	24,693	New 15 year lease	£9
Unit 1 Davis Way	Coop Funeral Services Limited	Hargreaves Holdings Limited	9,715	New 20 year lease	Stepped rents
Units 5&6 Business Hangers, Daedalus	Britten Norman	Fareham Borough Council	12,788	New 6 year lease	Confidential
Unit 9 Matrix Park	Amazon	IPIF	14,769	New 15 year lease	Stepped rents
J9S Cartwright Drive	Percival Aviation	Marick Developments	40 000	New long leasehold	£140
Unit 1 Davis Way	Hargreaves Holdings Limited	Elite Engineering Limited	9,715	Freehold	£62.79
Unit 39 Fareham Industrial Park	Professor Puzzle	Standard Life Investments	13,000	New 10 year lease	£6.38
3 Compton Way Segensworth West	CSS Group	M&G Asset Managers	40 311	Sale of long leasehold	£75

Key Office Locations:

- Manor Court, Segensworth East
- Fareham Heights
- Cams Hall Estate
- Fareham Town Centre
- Parkway North Hill
- The Pavilions / Eagle Point Segensworth West

The table below identifies relevant office transactions which have completed in Fareham over the last 18 months.

ADDRESS	OCCUPIER	LANDLORD / VENDOR	SQ FT	£ PER SQ FT	COMMENT
Unit 8 Victory Park	Rock7	Private Landlord	3,215	£175	Freehold sale
Elan House, Little Park Farm Road	The Protection Specialist	JDI	9,498	£12.50	New 5 year lease
Leroux House Cams Hall Estate	Future Fit Training	Heaton Prop Investors	6,209	£18.75	10 year 5 year break
New Court, Segensworth	Aerial Direct	Watchstone Group	21,061	£59.35	Long Leasehold - 125 years
South Barn, Cams Hall Estate	Polaris	Heaton Holdings	2,683	£15	New 10 year lease
2 Manor Court, Barnes Willis Road	Agile ICT	Ancient Order of Friendly Foresters	5,390	£132	Long leasehold
Onyx, Little Park Farm Road	Warmafloor	Forelle Estates	8,898	£16	New 10 year lease
Strand House Cams Hall	Solid Solutions	Heaton Holdings	2,040	£25	Pre let new build 15 year

Key investment and developer activity along the M27 corridor during the last 18 months:

ADDRESS	INVESTOR	TENANT DESCRIPTION	SQ FT	PRICE	YIELD
Fareham Business Park Gosport Road	Aberdeen Standard	Multi list trade and industrial estate	185 000	£36m	5.5%
Fulcrum 6 Solent BP	Kier	New spec B2/B8 scheme	55 000	£950k per acre	Land sale
Access Point Portsmouth	BMO	Formaplex	42 000	£6.85m	4.8%
Merlin Park	BAPF/Canmoor	Spec dev of 7 units	92 000	To Let £10 psf	New dev
Mountpark Eastleigh J5	Mountpark	Phase 2 completed	250 000	To Let £10 psf	New dev
Hounslow BP	TH Real Estate	Refurbished B8 unit	125 000	£18.85m	5.2%
Chichester Bus Park	Aberdeen Standard	Single HQ building let to Philips Respironics	92 000	£14.7m	6.2%
Fort Wallington Ind Estate Fareham	Mileway	Multi let estate 22 older units	175 918	@ £15m	6.5%
Concorde Way Segensworth South	Kingsbridge Estates	New development 7 units	91 000	£700k per acre net	Land sale

5.0 EMPLOYMENT LAND SUPPLY AND DEMAND

- 5.1 Our site by site assessment in floorspace provision terms, shows that in the B2/B8 category some 80% of the built stock falls within Grades A to B (thus indicating it is 'fit for purpose' for the Plan period at least) and some 7% is considered Grade C and 13% rated as Grades D and E, which in our view is, or will become inefficient and unsuitable for the needs of modern business. Whilst this appears a very positive weighting in favour of higher grade accommodation, during the plan period there is a significant proportion of the built stock which by 2026 will be a further 17 years older (obviously) and so may well be approaching obsolesce at this time. Therefore continual refreshment and replacement of the available employment space is essential to match market churn and satisfy the demands of business occupiers.
- 5.2 The B1a office sector follows a similar pattern, though arguably with 53% falling in Grade C quality assessment this gives more reason for concern on a 'fit for purpose' criteria during the next 17 years. We suggest this highlights the acute need to promote and identify new office development opportunities in the Borough. In Grades A and B, we have placed 36% of the built stock in these categories which bodes well for the Plan period.
- 5.3 It is imperative to have up to date evidence and market sentiment/understanding of occupier trends in assessing site protection, new allocation, and delivery requirements. As one of the most active commercial property agents, with our extensive market knowledge and research across the Solent region, our study incorporates current assessment of these property dynamics but the key message is that the Local Plan must be continually reviewed and re appraised to react to future market trends, site opportunities and allocations.

Welborne Site Delivery

- 5.4 Welborne is the pre-eminent site along the M27 corridor capable of delivering large scale employment floor space within a realistic timescale. However it is acknowledged that this prime opportunity has remained dormant over many years and has therefore been disregarded by potential occupiers or prospective developers. This is principally due to the fact the site has compromised motorway access and infrastructure limitations which require significant public sector investment to upgrade Junction 10 to kickstart and implement development activity. So understandably, Welborne has acquired a market perception of having tremendous potential but when will it have the certain prospect of delivery within a commercial timescale?
- 5.5 To change this mindset and market perception, evidence of infrastructure works commencing and physical activity on site, will be required together with a structured and concerted marketing campaign. In due course, the scheme concept and delivery process will require lateral thinking and detailed consideration to ensure that a clear and positive message is relayed to the market – the development partner (s) will be closely involved with this process as they will wish to assume responsibility and take a leading role in the marketing strategy.
- 5.6 There has generally been a positive momentum from the various stakeholders (landowners, planning authority, LEP and political support) to encourage and promote the scheme over a good number of years to facilitate the take up of new employment space which is critically required to attract and retain businesses in South Hampshire. The ‘game changer’ will be securing the infrastructure investment to kickstart the development.
- 5.7 Our study highlights that industrial and logistics occupiers looking to expand and relocate have become increasingly frustrated at the lack of availability of prime or good secondary stock along the M27 corridor, both due to heightened demand and the limited supply of new or replacement property coming onto the market. As a consequence, occupiers are out of

necessity faced with paying higher rents which in turn justifies viable new development and secures confidence with the financial investors.

- 5.8 Delivering such a vision as Welborne in comparable locations around the UK, has historically proved difficult with the economic uncertainty of past years (reduced public spending on major infrastructure projects and a tight funding market have been challenging) however as business ambitions and investment support returns, we strongly believe that the cyclical recovery in market conditions, coupled with Buckland's endeavours, will enable Welborne to realise its undoubted potential.
- 5.9 Our study amplifies the fact that continued growth in economic activity and resultant demand for B1c, B2 and B8 floor space, will reduce further the shortage of built stock across all quality grades of accommodation and frustrate the needs of occupiers. The absence of new speculative development of any scale is having a neutralising effect on the rate of market churn in the Borough, thereby restricting the availability of premises to incoming businesses and the relocation/retention of existing occupiers.
- 5.10 The advent and demand curve of e commerce logistics requires a greater recognition and understanding, as this sector will inevitably continue to grow. There is still a misconception in some quarters that B8 use supports a less equivalent number of jobs than manufacturing use - moreover the role of logistics in servicing the consumer and supply chains to industry is vital to the local, regional and national economy. A commonly held view has been that by competing with other industrial land uses, logistics activity is denying the local economy out of jobs and stalling GVA growth. The perception that B8 occupiers do not provide enough quality jobs relative to land use and thus suppress beneficial economic impact, is misguided we believe and findings from our recent research undertaken with Hampshire based companies demonstrates this point. We undertook a study to investigate and compare the number of jobs associated with specific businesses in the B2 and B8 sectors (including whatever office staff they employed) and the results are analysed in Appendix 9.

- 5.11 From a Use Class perspective, there is a distinct difference between occupation for warehouse and logistics property (B8), light industrial space (B1c) and general industrial (B2). Whilst there is clear definition for certain operations, in practice, many businesses cross over the planning boundaries and occupy space for combined manufacturing and assembly, material and finished goods storage, distribution and often a variable office content.
- 5.12 We have witnessed significant activity in home delivery requirements across the Region, with companies such as Amazon, DPD Logistics, AO.com recently acquiring distribution depots and with the boom of on line retailing and new housing, the demand in this sector will only increase (particularly in well accessed motorway locations).
- 5.13 In competition terms, Welborne is well placed due to its midpoint location and superior access however there are a number of new business parks/estates at either end of the M27 corridor which are coming on stream and will be capable of delivery before Welborne – what they don't offer is the holistic live and work proximity and environment in a new community such as envisaged and being conceived at Welborne.
- 5.14 The Welborne Plan identifies some 3Ha to be allocated for B1a office development, 7Ha for B2 and 10Ha for B8 respectively – we have assumed these ratios within our floorspace projections. Thus from our analysis and take up predictions, once the phased development is released over time, Welborne's future job prospects in both office and significantly to supply industrial/logistics employment space, we contend a realistic job forecast could be some 2,800 jobs, over the duration of the Plan period.
- 5.15 The strategic importance and justification for Welborne to be advanced and adopted within the Local Plan strategy has been founded on the following key challenge - to combat the critical shortage of good quality employment land, to capture inward investment and provide for expansion of existing business in the Borough and the wider sub-region and to address

and remove the barriers to growth in the local economy (as evidenced by the high level of out commuting).

- 5.16 Once the new motorway junction works and spine road infrastructure have commenced on site, there is a compelling and convincing message to relay to the market in order to promote the employment opportunity and capture occupier interest. This market engagement will boost the profile, raise awareness and typically spark expressions of interest to enable a serious dialogue to be progressed.

Daedalus Site

- 5.17 The Daedalus site (also known as Solent Airport) is located on the Gosport peninsular on the South Coast, almost midway between the expanding Southampton and Portsmouth conurbations, connected by the M27 motorway and has enjoyed Enterprise Zone status since 2012. Hampshire is well connected by land, air and sea with the benefit of two major sea ports, an international airport and strong road links to the national network to underpin the fact that the region has emerged as a key employment player in the marine, aerospace and advanced manufacturing sectors.
- 5.18 The Solent region is currently home to seven of the UK's top ten aerospace companies, has more than 25 marinas, benefits from internationally renowned universities and acclaimed FE colleges, and a multi skilled workforce and therefore should offer a highly desirable business environment.
- 5.19 Daedalus is a former naval airfield to the west of Portsmouth Harbour at Lee-on-the-Solent. Daedalus has access to the M27 motorway via Junctions 9 and 11 to both Portsmouth and Southampton and the M3 to London. The Newgate Lane South relief road has recently been upgraded by an £8m improvement scheme, whilst the Stubbington Bypass, a £34m scheme is due to commence in 2020, both of which will provide improved road connections. Fareham

and Gosport Town Centres are within close proximity to the site (approximately a 10 minute drive).

- 5.20 The Daedalus Waterfront site (within Gosport Borough) overlooks the Solent and the Isle of Wight with part of the site being regenerated by private developers Tidebank Ltd, who have successfully built out some 2508 sq m (27 000 sq ft) of smaller multi use industrial units on a speculative basis to attract local SME businesses, with a further phase now underway.
- 5.21 Daedalus' operational airfield provides business and leisure travel connectivity to/from mainland Europe, the Channel Islands and the Isle of Man, with approximately 25,000 movements a year. Further air links are provided by Southampton International Airport, approximately 11 miles to the north west of the site.
- 5.22 "The Solent Enterprise Zone at Daedalus, South Hampshire, was designated in 2012 and was one of 24 set up nationally to support local economic and employment growth. By 2026, it was estimated that some 3,500 jobs will be created within the Enterprise Zone, turning the area into a destination of choice for businesses within the marine, aerospace and aviation sectors." (Ref. <http://solentez.co.uk/site/hca/home>).
- 5.23 For many years Fareham Borough Council has identified Daedalus as being its most significant commercial development opportunity and has proactively engaged with other interested stakeholders to secure funding and provide substantial investment to release the full employment potential of the site.
- 5.24 In March 2015 the Council acquired from the HCA (now Homes England) some 369 acres of land at Daedalus, principally comprising the airfield and development areas to the East and West. The Vision and Outline Strategy document prepared by Fareham Borough Council

clearly defined the ambition and future intention to create economic growth and prosperity in the Borough and wider Solent region as follows:

“Our vision is for Daedalus to become a premier location for aviation, aerospace engineering and advanced manufacturing businesses, creating many skilled employment opportunities for local people, which is underpinned by a vibrant and sustainable airfield. Building on the existing general aviation uses, the airfield will be an attractive destination for visiting aircraft and will offer the hangars, facilities and service to attract more corporate and commercial aviation activities, allowing it to be self-sustaining in the medium term and contribute positively to the local community”.

- 5.25 Daedalus is recognised locally and regionally as a strategic site with a unique opportunity to create a key strategic employment hub to accommodate businesses that can exploit its location and airfield. It is an important facility as the only hard runway available for general aviation in South Hampshire.
- 5.26 The site comprises number development opportunities including Faraday Business Park, Swordfish Business Park, Daedalus Park (which actually lies within Gosport BC jurisdiction), the expanding CEMAST College & Innovation Centre and existing Solent Airport, with opportunities for airside and non-airside businesses, creating a hub for like-minded occupiers.
- 5.27 Daedalus East has two entrances off Broom Way accessing the Fareham Innovation Centre and CEMAST College and two recently occupied buildings by local high tec engineering businesses, Universal Tool Production and Proptech, on the Faraday Business Park together with the civil groundworks training facility CETC. Phase 2 of the Innovation Centre, 6 new business hangars and 5 new general aviation hangars are completed (with positive take up rates) with consent for an additional 5 business hangars. There are still airside and non-airside plots available at Faraday that offer businesses flexible opportunities from 0.2 - 2.86 ha (0.5 –7.07 acres). Once all plots have been developed it is anticipated that Faraday could

potentially deliver a further 73,000 sq m (785,000 sq ft) of new employment space over the Plan period.

- 5.28 Various plots are also available to accommodate commercial buildings on a 'design and build' basis to suit small, medium and large occupiers on either a leasehold or freehold basis. FBC have obtained planning consent and have submitted a business case to Members to speculatively develop 4 new industrial units totalling some 4,645 sq m from 929 to 1,858 sq m in response to the strong market demand from occupiers. We anticipate these will be available for occupation by Summer 2020 and will be a welcome boost to the stock levels in the Borough.
- 5.29 Daedalus West will form part of the second phase of development and comprises two zones; an aviation cluster comprising medium to large sized hangarage for commercial aviation businesses and a commercial business park for target sector based businesses. The Swordfish Business Park benefits from a prime location adjacent to the runway and has direct access onto the Gosport Road (B3334).
- 5.30 New infrastructure is currently being designed to underpin Swordfish including a new taxiway, access road, drainage and power. Legal preparation is in hand and construction work is due to commence in 2022, we believe. Once implemented development plots will become available ranging from 0.1 ha (0.25 acres) to 1.4ha (3.45 acres) (subject to amalgamations or sub-division). Once all plots have been developed it is anticipated that Swordfish Business Park could potentially deliver in the region of 34,000 sq m (366,000 sq ft) of new employment space over the Plan period.

Employment Floorspace Supply Overview

- 5.31 The volume of new employment floorspace completed between April 2016 and August 2019 is shown in the table below. This reveals that there was a total of 29 564 sq m completions of

which notably some 47% was completed during the 2018 /19 monitoring year and over 8000 sq m relates to the Innovation Centre Phases 1 and 2 at Merlin Way Daedalus.

Completions during Monitoring years 2016/17 – 2017/18 – 2018/19

Monitoring years/ B Use Class	B1a	B2	B8	Total
2016-17	0	0	3675	3675
2017-18	670	6764	0	7434
2018 -19	3656	10 154	0	13 810
TOTAL	4326	16 918	3675	24 919

5.32 The monitoring data records from Hampshire County Council show the quantum of employment floorspace with outstanding planning permissions at August 2019 (i.e. permissions that have not yet physically been started). For the purposes of our assessment, it is assumed that the Borough has no additional allocations from the draft Local Plan 2017 which contribute to the supply, unless there is committed employment floorspace in the form of a detailed planning or reserved matters approval or that there is a reasonable prospect that the site will be delivered in the development form envisaged during the Plan period.

5.33 Our assessment of supply has been informed by analysis provided in this study and our market knowledge, and includes current or more recent applications linked to an existing consent. As a result it provides an up to date and realistic indication of the preferred type of development.

5.34 Accordingly, the table below indicates there is a realistic deliverable supply of 11 973 sq. m of employment floorspace as at August 2019 from approved permissions which have not yet been implemented.

Unimplemented Planning Permissions as at August 2019

B Use Class	Unimplemented Planning Permissions (sq m)
B1a	835
B2	10,145
B8	993
TOTAL	11,973

6.0 OCCUPIER NEEDS AND FUTURE PREDICTIONS

- 6.1 In this section of the report, we have provided commentary on the following, the preferred location and the criteria sought by occupiers when seeking premises; the industry sectors in decline and those with growth potential; market occupational costs, rental tone and the impact on viability; job forecasting translated into employment floorspace demand; and the significance of the B8 logistics market and encouragement to entrepreneurs, start ups etc.
- 6.2 The key factors influencing occupier's relocation criteria are firstly geographical location, accessibility to road, docks, airports and rail communications, this proximity and drivetime to the M27 is often cited as a priority. The ability to retain and recruit staff with the appropriate skillbase is also vital, together with servicing customer/client needs and often there is a personal element from decision makers (historic reasons, home address etc).The quality of accommodation, specification of building, image, parking ratios, yard size/manoeuvring ability of commercial vehicles, are all important factors. The affordability / total property cost and occupational flexibility of the lease term is also a key consideration to many companies.
- 6.3 As a general guide to provide Grade A industrial floorspace in a modern working environment and present a base spec to the market, the following principles should be adhered to:
- Plot densities of around 45 -50% depending on the nature of use for B1c/B2 and B8 use;
 - Typical office content of around 5-15% although this can vary depending on the user requirements ;
 - Environmentally compliant and energy efficient buildings;
 - Secure site, individual yards and crime preventative environment;
 - Minimum eaves heights for units over 10,000 sq ft of 7.5m rising to 9/10m and higher for 50,000 sq ft units and above;
 - Dock level and grade level loading depending on user requirements;
 - Larger occupiers will require separate office parking to yard and loading areas;

- Offices finished to high quality with raised floors and cooling;
- Defined service capacities – adequate 3 phase power provision;
- Attractive and modern building design, retain a common theme throughout the Estate;
- Landscaped and parkland style grounds with uniform signage;
- Frequent and accessible public transport links;
- Clear understanding of Internet capability.

6.4 In a general South East context, rising office type employment bodes well for market demand, although this needs to be considered alongside changing working practices. Driven by advanced communications technology, many large corporate are seeking to increase space efficiencies and encourage agile working. This trend will focus demand on the best quality space, but may lead to accelerating levels of poor quality space overhanging the market. The floorspace per head density of the typical office has increased significantly in recent years, as occupiers look to capitalise on agile working to save on property costs – in the short space of a decade, staff density levels have increased from circa 15m² per person to circa 10m². Our own research also shows that while the UK's overall stock of office space has barely changed since the recession, the number of people employed in office type work has increased. However, in seeking to achieve 'spaceless growth', businesses are placing increasing importance on the quality of space that they wish to occupy.

6.5 We define a Grade A office specification in a Solent market place context, as having open plan footplates to accommodate workplace density of 8 – 13 m² per person with a NIA (net) to GIA (gross) efficiency of 80/85%; floor to ceiling heights minimum of 2.6m; BREEAM Very Good or Excellent rating; raised floors, air conditioned space, prestigious reception/lobbies; prime location close to a motorway (or transport hub if City or Town Centre); a quality environment and design to reflect company image; superfast broadband; acceptable (as appropriate) parking ratios etc.

- 6.6 The most progressive workplaces are those which provide a multiplicity of work settings and have ample connectivity, with an increasing emphasis on informal spaces. This includes both collaborative and quiet areas which are suited to different types of work and can cater to different personality types. Also, beyond the immediate work environment, access to a range of amenities offering refreshment, exercise and relaxation are other important ways that a building can support wellbeing. Businesses are increasingly using their workspace as a means to communicate the values and culture of the organisation.
- 6.7 In today's world, businesses have to work ever harder to differentiate themselves from their competitors, leading to careful consideration on fit-out design to give a sense of kudos to their staff and visiting clients. As working practices become more agile, the office is likely to serve increasingly as a focal point for the face to face interaction between staff and clients, intensifying this trend further still.
- 6.8 The modern office occupier seeks affordable, efficient space in a high quality environment and typically their property criteria includes:
- Large floor plates to enable occupation on a single floor;
 - Ready access to on site or nearby amenities – retail, restaurant, leisure;
 - Good local and regional connectivity – ideally road, air and rail;
 - Adequate parking provision for staff and visitors;
 - High speed broadband availability;
 - Attractive and vibrant public realm or 'green environment';
 - A sense of place and identity to reflect company image and ethos.
- 6.9 In demand assessment terms within the Borough, our evidence suggests that whilst the volume and positive interest of applicants is steady at present, the profile of businesses that would be attracted to new office development will be confined to a select number of candidates, able and willing to accept a prime property cost. We foresee that subject to the

economic cycle and revival continuing, the demand for office space will invariably grow but without the provision of 'quality sites', the larger, primary occupiers will gravitate to elsewhere in the Region.

- 6.10 Our market research and commentary demonstrates the strong investor/developer demand currently for B2/B8 uses along the Solent corridor, where there is greater confidence in its viability and return. This is in contrast to the traditional B1a office market, where occupier rationalisation is occurring and there is a pre dominance of flexible serviced/enterprise business centres which are more attractive to the business community. Typically office activity is polarised to more established, desirable locations such as Solent Business Park, Lakeside, Chilworth Science Park etc. however these are car borne dependent and are heavily congested. One solution could be to attempt to rejuvenate the shrunken and neglected Town Centre office market. This is a common malaise in many UK towns and cities which have comprehensively suffered to competing out of town business parks – we believe this trend is capable of being reversed with a pro-active planning policy to encourage the promotion of new development, located both in town and out of town clusters. In Fareham Borough there is however a critical shortage of readily available, viable office sites in favourable locations.
- 6.11 We have also based out predictions on the basis that there will be a required element of replacement stock as older existing floor space finally becomes obsolete or it will be unviable to refurbish or meet energy performance legislation
- 6.12 We have examined our database of applicants who have registered property enquiries with our agency colleagues and record the breakdown in both volume and size range, whilst clearly a large proportion of these requirements will not be converted into transactions and result in occupation within Fareham, but this approximate weight of total floorspace looking in the market at this moment in time is a good indication of the strong, current occupier demand.

Current Number of Registered Applicants (Sept 2018)

SIZE RANGE (SQ M)	B1a USE	B1c/B2 USE	B8 USE
0-150	7	12	9
150-250	8	9	6
250-500	18	10	8
500-1,000	17	8	11
1,000-2,000	13	7	9
2,000-5,000	11	5	7
5,000 +	0	4	8
TOTAL (Sq M)	74 (84 350)	55 (71 700)	58 (112 875)

NOTE: We have compared the above data with the same range and number of applicants currently recorded on our database at August 2019 and find there is an approximate 10% decrease in the volume of enquiries. Typically, the proportion of B2 floorspace compared to the volume of B8 occupier requirements is approximately 40:60 and we have adopted this ratio in our analysis of future demand.

6.13 Notably from our engagement with businesses conducting property searches, the industry sectors we consider will proliferate and most likely to extend property requirements within the Fareham area will include, though not exclusively the following:

- E-Commerce/internet shopping/home deliveries/reverse logistics;
- Trade counter operators/materials suppliers;
- Supply chain distribution/food and catering;
- Service industries/maintenance contractors
- Advanced/niche engineering/R&D activity;
- Educational/training provision;
- Professional consultancy services inc legal, accountancy etc
- Specialist research and production;

- Telecoms/recruitment/financial activities;
- IT/software design and innovation.

6.14 A sector generally regarded as one of the most significant opportunities for the UK to rebalance and reinvigorate the economy is advanced manufacturing such as being pursued at Daedalus. This sector has the potential to drive up levels of value added in the economy and contribute substantially to export growth and its global competitiveness is ultimately determined by the ingenuity and skills of its workforce. One of the most widely used definitions of advanced manufacturing is the use of technology to improve products and/or processes to the highest degree of quality and in compliance with industry specific tolerances and certification. A company operating in the advanced manufacturing sector will display the following characteristics:

- Technically complex products with high levels of design;
- Customised and innovative products to create a competitive advantage in their market;
- Focused on highly skilled workers and supporting training/apprenticeships (students graduating from CEMAST will undoubtedly prove attractive to existing and incoming employers).
- End products are reliable, affordable and often will have little waste due to the reuse of recyclable nature of the material;
- Extensive use of computer, high precision and information /CAD technologies to ensure conservative energy consumption;
- Capable of delivering a diverse range of products in small or large volumes with the efficiency of mass production and the flexibility of manufacturing to respond quickly to bespoke;
- Intensive use of capital and knowledge and requires long term investment decisions to develop processes and buy equipment;
- Competes in international and domestic markets.

- 6.15 Increasingly we have encountered demand for premises from the advanced manufacturing sector right across the building size range and from niche, prototype and full production businesses in principally the marine, defence, aviation, medical device, energy and pharmaceutical activities. We anticipate the expertise, reputation and innovation displayed by these companies will be generating a fruitful source of property requirements and employment growth over the Plan period. The size range of premises will be varied but the quality of the building product will be essential. There still remains a sizeable and important traditional assembly/ production sector in the Borough that will have ongoing property requirements, however in practice we consider these occupiers will consolidate and downsize their operations.
- 6.16 It is well documented that the UK has suffered a long term departure from traditional manufacturing activity to services and logistics provision – this year on year decline has particularly impacted on certain Local Authorities in South Hampshire. We consider now however, that this trend is less threatening and in certain industry sectors is being reversed (in marine, aerospace, defence and advanced engineering for instance). Such companies with a strong bias towards highly technical and design led processes, R&D and proximity to existing clusters and supply chains, are being retained and attracted towards the UK to exploit the educational and knowledge base/labour pool and, interestingly, to compete favourably with developing economies abroad.
- 6.17 As stated previously, the demand for either industrial or office floor space is unaffected by administrative boundaries – the economic and commercial drivers are the Cities, the Ports, the motorways, air and rail links, a requisite/skill matched workforce and most importantly, the land and property availability which is deliverable.
- 6.18 It is essential that the sub-region is ‘sold’ to inward occupiers and the benefits of this business location is reinforced to local companies considering expansion – the relevant facts and

figures supporting the decision making and criteria on which an occupier will assess the suitability of the location must be both accessible and readily available. This promotion should encompass travel times and distances; commercial facilities; labour supply and skill base; housing provision; retail and leisure attractions; existing South Hampshire employers of note; introduction to funding programmes/grant support (LEP and National etc); links to education via universities and colleges and apprenticeships/training organisations; Local Authority engagement and relationship building; utilities/connectivity provision etc.

- 6.19 We have seen a marked increase in industrial rents since 2014 post recession, rising from circa £7.25 per sq ft to over £9 per sq ft for prime stock or in excess of this for smaller units – due principally to the acute lack of supply and occupiers recognising that new or better quality modern stock improved the efficiency of their occupation and was worth paying for. We regard this rental tone to be now accepted and evidenced to justify and underwrite new development activity, either pre let or speculative.

Typical Industrial Rents and Capital Values in Fareham

Location	Quality of Stock					
	New/Prime (£psf)		Secondary (£psf)		Tertiary (£psf)	
	Capital Value	Headline Rent	Capital Value	Headline Rent	Capital Value	Headline Rent
Under 5,000 sq ft						
Primary	145	10	100	8.50	75	7
Secondary	120	9	90	7.50	60	6.25
5,000 – 20,000 sq ft						
Primary	135	9.50	90	7.50	75	6.25
Secondary	115	8.50	80	6.50	65	5.25
Over 20,000 sq ft						
Primary	130	9.25	85	7	65	6
Secondary	110	8.50	70	6.25	50	5

Typical Office Rents and Capital Values in Fareham

	Quality of Stock			
	New/Prime (£psf)		Secondary (£psf)	
Location	Capital Value	Headline	Capital Value	Headline
Under 5,000 sq ft				
Primary	250	20/25	175	15
Secondary	220	15/17	150	12.50
Over 5,000 sq ft				
Primary	220	18/19	160	14
Secondary	200	15	140	11/12

NB: New/Prime values are estimated as there is little or no recent evidence in the Fareham market.

6.20 In order to consider employment needs and forecasts during the Plan period we have applied three different methodologies.

6.21 Firstly, we have researched data (Nomis ONS 2017) and extracted the relevant demographic and labour profile for the Borough, together with a comparison of the Solent LEP and South East UK corresponding rates.

Table of Labour Market Profile – Fareham Borough Council, Solent LEP and South East

Source: Nomis Office for National Statistics 2017

	FAREHAM BOROUGH		SOLENT LEP		SOUTH EAST ENGLAND
Total Population (2017)	116,200		1,065,400		9,080,800
Employment and unemployment (July 2017 – Jun 2018)					
• Economically Active	63,400	85.9%	644,500	80.4%	81.1%
• In Employment	62,000	83.9%	613,400	76.5%	78.3%
• Employees	55,600	75.9%	528,100	66.7%	66.2%
• Self-employed	6,500	8.0%	82,800	9.6%	11.8%
• Unemployed	1,600	2.5%	31,000	4.8%	3.5%
•					
Employment by occupation (July 2017 – June 2018)					
Soc 2010 Major Group 1-3	48.1%		42.4%		50.6%
1. Managers, Directors and Senior Officials					
2. Professional Occupations					
3. Associate Professional and Technical					
Soc 2010 Major Group 4-5	19.9%		20.9%		19.9%
4. Administrative and Secretarial					
5. Skilled Trades Occupation					
Soc 2010 Major Group 6-7	15.6%		18.3%		16.0%
6. Caring, Leisure and Other Service Occupations					
7. Sales and Customer Service Occupations					
Soc 2010 Major Group 8-9	16.4%		18.5%		13.4%
8. Process Plant and Machine Operatives					
9. Elementary Occupations					
Qualifications (Jan 2017 – Dec 2017)					
• NVQ4 and above	38.6%		34.4%		41.4%
• NVQ3 and above	65.0%		58.3%		61.1%
• NVQ2 and above	83.6%		76.8%		78.6%
• NVQ1 and above	94.5%		88.8%		89.5%
Earnings by Place of Residence Gross Weekly Pay					
• Full-time Workers	£615.4		£552.6		£614.5
Out of Work Benefits Claimant Count by Sex – not seasonally adjusted (Sept 2018)					
• All People	0.7%		1.9%		1.4%
Jobs Density (2016)	58,000	0.83%	534,000	0.79%	0.88%
Employee Jobs (2017)					
• Total Employee Jobs	48,000		520,000		
• Full-time	31,000	64.6%	337,000	64.8	66.2%
• Part-time	18,000	37.5%	182,000	35.0	33.8%

	FAREHAM BOROUGH		SOLENT LEP		SOUTH EAST ENGLAND	
Employee Jobs by Industry						
• Mining & Quarry	10	0.0%	225	0.0%	0.0%	
• Manufacturing	4,000	8.3%	41,000	7.9%	6.2%	
• Electricity, Gas, Steam and Air Conditioning Supply	20	0.0%	2,250	0.4%	0.5%	
• Water Supply: Sewerage, Waste Management and Remediation Activities	300	0.6%	3,500	0.7%	0.8%	
• Construction	3,000	6.2%	28,000	5.4%	5.5%	
• Wholesale and Retail Trade: Repair of Motor Vehicles and Motorcycles	8,000	16.7%	85,000	16.3%	16.3%	
• Transportation and Storage	3,000	6.2%	27,000	5.2%	4.6%	
• Accommodation and Food Service Activities	3,000	6.2%	40,000	7.7%	7.3%	
• Information and Communication	2,000	4.2%	22,000	4.2%	5.9%	
• Financial and Insurance Activities	1,500	3.1%	15,000	2.9%	2.8%	
• Real Estate Activities	700	1.5%	7,000	1.3%	1.6%	
• Professional, Scientific and Technical Activities	3,000	6.2%	31,000	6.0%	8.0%	
• Administrative and Support Service Activities	4,000	8.3%	46,000	8.8%	8.7%	
• Public Administration and Defence; Compulsory Social Security	3,500	7.3%	23,000	4.4%	3.2%	
• Education	5,000	10.4%	55,000	10.6%	10.4%	
• Human Health and Social Work Activities	6,000	12.5%	70,000	13.5%	12.7%	
• Arts, Entertainment and Recreation	1,000	2.1%	13,000	2.5%	2.7%	
• Other Service Activities	1,250	2.6%	11,000	2.1%	2.5%	
Civil Service Jobs as a Proportion of Employee Jobs (2018)						
• Total Civil Service Jobs	4.9%		1.8%		0.9%	
UK Business Counts (2018)						
Enterprises						
• Micro (0 to 9)	3,940	88.4%	37,055	88.1%	363,890	89.9%
• Small (10 to 49)	435	9.8%	4,200	10.0%	33,090	8.2%
• Medium (50 to 249)	70	1.6%	675	1.6%	6,035	1.5%
• Large (250+)	10	0.2%	150	0.4%	1,535	0.4%
TOTAL	4,555		42,080		404,555	

6.22 We have assessed the potential growth and decrease in employment numbers on a qualitative exercise within the Borough, based on our knowledge of property requirements and which industry sectors are expanding and those in decline, both for B1c/B2/B8 and B1a occupiers, utilising the NOMIS categorisation (see Appendix 6).

Table to Forecast Labour Growth and Decline by Industry Category for Fareham Borough to 2018-2036

Job Category by Industry as defined in Nomis Official Labour Market Statistics (2017)	Score % Positive Growth +10%/+20% Negative Decline -10%/-20% No change - 0	Resulting Job Numbers (+ or -)
C	+10	400
F	+20	600
G	+10	800
H	+20	600
I	+10	300 B1a
J	+20	400 B1a
K	0	0
M	+20	600 B1a
N	+10	400 B1a
O	-20	-700 B1a
P	0	0
Q	+20	1,200 B1a
R	0	0
S	0	0
Total		+4,600

6.23 These projections translate into an additional 2,200 jobs in B1a offices and 2,400 jobs in B2/B8. These will necessitate additional floor space requirements of B1a (12 jobs per sq m) of 26,400 sq m and in the B2/B8 category (average of 53 jobs per sq m) additional employment space of 127,200 sq m during the plan period.

6.24 Secondly, we have calculated the historic take-up of new development floorspace, built and occupied since 1998 (thus over the last extended 20 year period) in the Borough to give an average annual take-up rate to inform and benchmark future projection rates. Our analysis deliberately bridges the pre and post recessionary market conditions to review market

behaviour during the peaks and troughs of an economic cycle and the table below identifies both pre-let and speculative developments. Arguably the opportunities presented at Welborne and Daedalus offer a greater critical mass and self identity which may well improve the quantum and speed of take up – such as happened at Kites Croft, Titchfield.

Table of New Development Completions (B1a Offices and B2/B8 Industrial/Logistics since 1998 to 2018 in Fareham Borough

LOCATION	YEAR OF PRACTICAL COMPLETION OF SCHEME/BUILDING	TOTAL FLOOR AREA APPROX (SQ M)
B1a		
The Gardens, Broadcut	2003	4500
Eagle Point, Segensworth	2002	3000
Cams Hall Estate	1998 onwards	8500
Furzehall Farm	2005	1000
Segensworth Business Centre (Office part)	2006	1250
Innovation Centre, Daedalus	2016 & 2018	7000
Fareham Borough in Total		25 250
Average Annual Sq M		1262.5
B2/B8		
Segensworth Business Centre (Industrial section)	2006	3500
Kites Croft	2005 and 2016	32 000
Matrix Park / i0 Centre/Stephenson Rd	2003 onwards	46 500
Faraday Business Park, Daedalus	2016	10 000
Axis Park Fort Fareham	2009	5000
J9 South, Cartwright Drive	2018	4000
Pennant Park, Standard Way	1999	3750
Barnes Wallis Rd	1998	4 000
Fareham Borough in Total		108 750
Average Annual Sq M		5437.5

6.25 Finally our third method was to combine and take account of various determinants, such as the historic patterns of new and existing floorspace take up, in both the B1a and B2/B8 sectors; reflect on the employment modelling undertaken by PUSH and our own analysis; how this may then be translated into Fareham's future job prospects; our market judgement of forward occupier demand; and the suitability of the employment land supply. We contend that a realistic forecast for the net future employment space needed in the Borough 2019 -2036 would be:

EMPLOYMENT FLOORSPACE NEED 2019 - 2036

MEASURE	USE B1a	USE B2	USE B8
Annual Historic Average Take Up (sq m)	5,574	10,000	15,000
Employment Land Supply Potentially Deliverable (sq m)	41,750	134,448	82,793
Viability and Marketability	Weak/May Improve	Strong	Strong
Residual Land Values	Negative	Positive	Positive
Projected Additional Annual Demand (sq m)	1,858	1,858	2,787
Total Net Need (sq m)	31,586	31,586	47,379

EMPLOYMENT FLOORSPACE NEED Vs SUPPLY 2019 - 2036

MEASURE	USE B1a	USE B2	USE B8
Total Net Need (sq m)	31,586	31,586	47,379
Permissions Outstanding at Aug 2019	835	10,145	993
Employment Land Supply Potentially Deliverable (sq m)	41,750	134,448	82,793
Total Floorspace Supply (sq m)	42,585	144,593	83,786
Excess/(Shortfall) on Employment Land Supply Potentially Deliverable (sq m)	10,999	113,007	36,407
Excess/(Shortfall) on PUSH Estimate 55,000 sq m B1a and 75,000 sq m B2/B8 weighted 60%/40%	(12 415)	99,593	53,786

NB: The brackets indicate a shortfall.

- 6.26 Applying the job densities referred in the HCA Employment Density Guide (3rd Edition Nov 2015) the above net need for offices would produce some 2632 new jobs and similarly assuming a full take up of B2/B8 occupation, this would support a net need creating 1490 new jobs, or realistically allowing for a 20% office content associated with the B2/B8 category, an additional 1018 jobs.
- 6.27 We calculate these overall net floor space forecasts could produce between 4122 and 5140 new jobs in total. By comparison, the somewhat peremptory PUSH study estimates a target of 6000 new jobs in total by 2036 which whilst desirable, we suggest maybe over ambitious.
- 6.28 There is a body of research regarding population and employment growth and the link with traffic capacity in a specific area and that accessibility is a strong determinant of employment density. These studies suggest that employment growth (and therefore productivity) increases as transport infrastructure capacity increases. The random commuting patterns and unpredictable traffic congestion along the M27 corridor make analysis of future projections inevitably complex, however we suggest developing alternative scenarios by a specialist transport planner would be worthwhile – particularly bearing in mind the proposed motorway improvements, new housing settlements and support required to invest in public transport.
- 6.29 The emerging Fareham Local Plan will be reflective and influenced by the national UK Modern Industrial Strategy and the Local Industrial Strategy (LIS) currently being prepared by the Solent LEP following public consultation and business engagement. The aim is to boost productivity by supporting businesses to create good jobs and increase earning power throughout the UK with investment in skills, industries and infrastructure. This Strategy sets out the 'Grand Challenges' of artificial intelligence and data, ageing society, clean growth and the future of mobility. The future major development activity heralded at Welborne and Solent EZ Daedalus are fundamental to the delivery and success of the LIS , not just in the Borough but across the whole Solent region. The recently published NPPF guidelines clearly indicate

that a realistic assessment of a site's potential should focus on viability and deliverability within an identifiable timeframe and subsequently evaluated and translated into the Local Plan. During 2019 the Local Industrial Strategy will be formulated and drafted by the Solent LEP to which FBC should be an active participant – whilst the economic driver of the marine and maritime industry will be the main thrust of the local Strategy, other significant employment clusters such as aviation, contact lens, logistics/supply chain etc should not be overlooked nor underestimated in employment terms.

- 6.30 As stated, the Welborne floorspace take up projections will have a significant impact on the future employment capacity in the Borough, on the assumption that the new motorway Junction 10 of the M27 will be operational by 2025 - as this prime location will attract extensive occupier demand across the South Coast. We contend that the delay to the opening of the Stubbington bypass is not so critical but has still been one inhibitive factor in attracting occupiers to the Solent Enterprise Zone at Daedalus. The Segensworth estates will continue to thrive throughout the Plan period, notwithstanding the probable M27 congestion until 2021 during completion of the SMART/J9 works - however in time, there would be significant traffic flow improvements if the North Whiteley relief road becomes a reality.

7.0 SITE ASSESSMENT ANALYSIS

7.1 By formulating a list of criteria and a method of assessing the market appeal of existing industrial estates, offices and employment sites, a more consistent and objective measurement of the quality as well as the quantity can be established. We have modelled a five category grading system to identify high to low quality ranking against eight categories of assessment criteria under the headings:

- Strategic Location/accessibility;
- Estate Layout/prominence;
- Character of area/neighbouring uses;
- Local amenities/public transport;
- Planning status;
- Occupier perception/property values;
- Age and suitability of built stock (fit for purpose);
- Redevelopment prospects and constraints.

7.2 We note there is an inherent simplicity in scoring sites and premises against a uniformed set of criteria but we have endeavoured to apply a consistent approach to identify those sites which are either 'fit for purpose' now, have longevity in providing employment space and will continue to meet the needs of businesses in the Borough or conversely those sites which, in the short to medium term, will become obsolete or should warrant redevelopment. Clearly there are specific factors to satisfy the individual company's requirements which are reflected in our judgement of the market's perception (Category 6 of the Assessment Criteria) such as car parking ratios, security, building image, affordability etc.

- 7.3 To streamline the analysis we have avoided weighting the criteria as in practice, an occupiers selection will consider all of these factors depending on the priority for their specific business needs however our experience is that location, building specification/state of repair and occupational cost are the principal determinants.
- 7.4 In order to assess the development prospects of the sites which have been identified (either with or without planning permission) as suitable for new employment space provision at some future date, we have ascribed a rating to reflect those with greater prospects of success at an earlier timeframe to score higher than those with constraints or a longer delivery timescale.
- 7.5 We do recognise that there are individual sites and premises that may not, due to their age or poor specification or 'scruffy' nature, perform well in terms of quality and so receive a low assessment, but are still 'fit for that purpose'. From the ranking system it is clear that the older, tertiary estates such as those at The Boatyard or The Tanneries score poorly as they have failings in several categories. They do however have a rightful and beneficial place in the market and unless the condition of the buildings have exceeded their economic life or a whole scale redevelopment is justified, they need to be retained and protected to satisfy this sector of occupier demand.
- 7.6 Our analysis of the protected sites indicates a notable variation in quality to determine those which should be futureproofed and prioritised, and those requiring re investment and upgrading, or finally discarded. There is good argument for encouraging release of lower graded sites, either by active planning policy or LA estate management, or simply rely on the fact that commercial forces will seek out a higher re development value for alternative uses. If one assumes that Grades D and E are vulnerable, the vital question is where will the replacement stock come from and to justify new build development, will rents be affordable to the displaced SME and tertiary businesses.

7.7 Based on our identification of potential site redevelopment opportunities, a thorough investigation should be undertaken by FBC or appointed consultants, to assemble the relevant site information (both physical and legal), to apply a market appraisal and to determine the planning options and if appropriate, approach the site owner to promote and attempt to unlock the opportunity. Prior to undertaking this exercise, there will need to be a judgement as to the size and realistic prospects of delivery of the opportunity to justify the time and cost involved.

7.8 Our analysis revealed that the existing employment sites in the Borough are categorised in terms of quality of specification, age and meeting the needs of modern businesses as follows (to show the percentage of Grade A best to E worst, based on the approximate total sq m of floorspace for each location):

GRADE	B1 a (Sq M)	%	B2/B8 (Sq M)	%
A	49 146	33	549 355	52
B	5618	3.8	293 854	28
C	78 669	52.7	71 535	7
D	14 633	9.8	97 148	9.5
E	956	0.7	35 336	3.5

7.9 We have listed below the identified key allocated and potential new employment sites at August 2019 which are capable of delivery subject to infrastructure, planning and land ownership constraints:

LOCATION	SIZE (Max Floorspace Sq M)	POSSIBLE TIMESCALE (year range)	B1a	B2	B8	COMMENTS
Welborne – Industrial /Logistics	75 000	2025 - 2036		34,500 (46%)	40,500 (54%)	Prime location, of regional significance, timing dependent on J10 redesign
Welborne - Office	30 000	2025 - 2036	30,000 (100%)			As part of mixed use scheme 3Ha allocated
Daedalus - Faraday	73,291	2019 - 2036		58,633 (80%)	14,658 (20%)	Development ongoing, spec units planned
Daedalus - Swordfish	34 000	2022 - 2036		27,200 (80%)	6,800 (20%)	Medium term opportunity, airside related
Land at Standard Way	2000	2019 - 2025		1,000 (50%)	1,000 (50%)	Understood proposal to build spec units
Solent 2	23 500	2019 - 2029	11,750 (50%)	5,875 (25%)	5,875 (25%)	Marketed for long period, unfulfilled potential
Land West of Newgate Lane	10 000	2024 - 2036		5,000 (50%)	5,000 (50%)	Infrastructure works required, off new bypass
Little Park Farm Segensworth	11 200	2020 - 2025		2,240 (20%)	8,960 (80%)	Excellent location and potential, access constraints
Totals			41,750	134,448	82,793	

8.0 CONCLUSIONS

- 8.1 Our first observation is that the alignment and weighting between housing provision and employment needs (and the evidence base within the Borough to support the right balance) should be examined and periodically reviewed to ensure that one does not have precedence over the other and so determine the correct equilibrium.
- 8.2 Whilst there are a limited number of potential employment sites which are under threat of policy change to residential or non-employment uses, we believe all potential employment sites should be retained in the emerging Local Plan. Moreover with the evident delay in delivery of the major employment sites in the short to medium term, one could advocate that certain identified housing sites should be re assessed and utilised for B class development instead (or in tandem as mixed use schemes).
- 8.3 We believe it is important to review and re-evaluate the Local Plan regularly as market dynamics fluctuate and economic prospects/business needs change (and site specific circumstances change as they invariably do and potential new development options arise).
- 8.4 In specific cases where previously earmarked sites are now deemed unsuitable for future employment use, FBC should be bold enough to deallocate such sites where appropriate. Equally there should be a concerted effort to detect and identify future opportunities, which may not be readily apparent now, for example, additional office development at Cams Hall Estate; potential development land to the east of Cartwright Drive; land adjoining the A27 Southampton Road at Segensworth; and any brownfield / obsolete building opportunities
- 8.5 In our opinion it is far preferable to have a surplus of employment land in the Local Plan, wherever possible, in order to enhance the choice and variation to developers and occupiers (arguably supply creates and attracts demand) however all the sites recognised must be viable and have a realistic prospect of development within a reliable delivery period.

- 8.6 The PUSH Spatial Position Statement in June 2016 states that in the Borough, the increase in net floorspace required is 55,000 sq m B1a offices and 64,000 sq m B2/B8 floor space until 2034 (this has been increased to 75 000 sq m to reflect the 2 year additional Plan period). So with 18 years remaining, office sector wise this infers a take up each year of 3,500 sq m per annum whereas the evidence shows less than half this take up (see table on p61) thus we consider the PUSH projection to be highly improbable based on historic trends. Therefore we strongly recommend revision and a challenge to reduce this forecast. Whilst we acknowledge the PUSH requirements should set ambitious growth targets to raise productivity and earning power, they should be tempered with a semblance of market reality.
- 8.7 Welborne is destined to become the most prominent new community and substantial employment offer along the Solent corridor, once the site infrastructure and upgraded motorway junction are completed to enable delivery timescales with certainty can be confirmed to prospective occupiers.
- 8.8 Over time, Daedalus and Welborne will deliver new floorspace, however we suggest there is a need to identify new tracts of land, hitherto undiscovered, with potential to offer B Class use development during the Plan period, critically over the next 5 years or so and to provide genuine competition to alternative employment sites in other parts of the Solent region. These will be deliverable within a shorter timescale (generally occupiers seeking new employment space are not bound by administrative boundaries).
- 8.9 The economic importance of B8 logistics and supply chain activity should not be underestimated. This is particularly relevant to the Borough having direct access to the M27 with three motorway junctions and its proximity to Southampton Docks and Portsmouth International Ferryport. This sector is vital in supporting manufacturing activity and servicing the broader Solent economy, such as the cruise ship industry and the ever increasing

demands of e tailing/ internet deliveries. In practice we contend that B8 designated occupiers do not necessarily generate lower job densities than a B2 user, nor infer lesser GVA productivity (as in many instances, B8 can provide a greater employee density if associated with a high office content).

- 8.10 There is compelling demand to support development of smaller unit schemes – we support the provision of starter and move on size ranges, offered to the market on a leasehold, or with particular appeal to owner occupiers requiring freehold tenure – many national developers/ institutional investors look for economies of scale and so build bigger units but new, modern stock to accommodate the local, SME size business is also essential to promote a thriving, diversified local economy. We advocate the Council promote and support further investigation into development of a new enterprise/innovation centre, similar to the successful Daedalus model, further north within the Borough closer to the motorway or Town Centre, to encourage and stimulate entrepreneurial activity.
- 8.11 Finally to recap, we consider a realistic forecast of the net future B class employment space need (from 2019 to 2036) be considered on three factors; a pragmatic estimation of annual take up, the available land supply and the additional growth required to fulfil employment targets - to give an overall net need target (see table overleaf). This indicates that Fareham Borough has a notional B1a office provision that is heavily reliant on delivery at Welborne and Solent 2 and conversely the Borough is ultimately over supplied with a B2/B8 land supply. Moreover, there is significant reliance on Welborne delivering new employment space in the medium to longer term and an assumption there will be significant and sustained take up at Daedalus/Solent Enterprise Zone.

FAREHAM BOROUGH EMPLOYMENT LAND STUDY CONCLUSION 2019 -2036

	Net Floorspace (sq m)		
	B1a	B2	B8
Employment Floorspace Requirements 2016-2036	31,586	31,586	47,379
Outstanding Permissions at August 2019	835	10,145	993
Remaining Floorspace Requirements at August 2019	30,751	21,441	46,386
Potential Floorspace Delivery from Future Employment Land	41,750	134,448	82,793
Total Employment Land Supply (Shortfall)/Excess	10,999	113,007	36,407

9.0 REFERENCE SOURCES

The following research documents and publications were consulted in the preparation of this report:

1. Fareham Draft Local Plan 2011 – 2036 (FBC Oct 2017)
2. Fareham Interim Employment Land Review (FBC Oct 2017)
3. Employment Density Guide 3rd Edition (HCA Nov 2015)
4. The Welborne Plan – Local Plan Part 3 (FBC June 2015)
5. The Economic Role and Contributions of the Maritime Sector in the Solent LEP (CBRE May 2018)
6. Push Spatial Position Statement (June 2016)
7. Transforming the Solent – Productivity and Growth Strategy (Solent LEP Feb 2017)
8. Local Industrial Strategies Policy Prospectus (HM Government Oct 2018)
9. Nomis Labour Market Profile (ONS 2017/2018)
10. Effect of Capacity Constraints on Population and Employment Distribution (National Infrastructure Commission University of Leeds June 2018)

10.0 GLOSSARY OF PROPERTY TERMS

TERM	DESCRIPTION
Alienation	Alienation is the legal transfer of title of ownership to another party, often a leasehold interest by way of assignment or sub letting.
Amenities	Availability of one or more nearby shopping, food and drink establishments (including bars, restaurants and coffee shops), supermarkets and leisure activities such as gyms and cinema. The term also relates to availability of amenities within a building, which add benefit to it and therefore, increase its value or occupier appeal. In this respect, amenities could include lifts, cycle storage, showers, gym/fitness centre facilities, café/coffee shop, parking, high-speed internet etc
Availability	The amount of built space currently being marketed as available to purchase or lease to another occupier (vacant and occupied stock) expressed in sq m or sq ft.
Brownfield	Previously built on or developed land, may require remediation.
Capital Value	The open market value of a property asset, freehold or leasehold, as distinct from its annual rental value.
Floor plate	An open area of contiguous space on one floor of a building (usually applied to an office building).
Freehold	The most superior legal title to the ownership of premises - legally referred to as "fee simple absolute in possession" - as opposed to a long leasehold (or ground lease) which will often run for 100 years or more, and leasehold (usually the occupational lease interest).
Grade A	Used to categorise the quality of office or industrial space. Grade A space is the best quality with a high standard of specification, usually new construction or recently extensively renovated. Offices are often categorised further into Grade B or Grade C.
Headline Rent	This is the gross payable rent payable by a tenant after all incentives (rent free periods typically) have ended. Headline rent is most commonly associated with open market lettings but increasingly at lease renewal and lease re-gearing/restructuring.
Incentive	An incentive is a payment that is used to encourage a tenant to take on a new lease when a new lease is granted or existing lease assigned. A common example is where a landlord pays a tenant a sum of money to contribute to the cost of a tenant's fit-out or allows a rent free period. The level of incentive will vary according to market conditions.
Leasehold	Where a Landlord and Tenant relationship is formed for a fixed number of years paying a market "rack" rent annually.
Long Leasehold	See Freehold
M27 Corridor	The Cities and Towns located adjacent to the M27 motorway, including Portsmouth, Southampton, Eastleigh, Fareham and Havant.
Mid-Box Unit	A term used in respect of industrial and logistics properties to define the size. A mid-box unit is a property of between 50,000 sq ft and 99,999 sq ft.
Mixed-Use Development	A form of development which blends commercial, residential, retail, cultural and/or leisure uses together, often to produce a viable outcome.
Multi-Let	A property or estate that is owned by a single entity and leased to multiple occupants.
Net Effective Rent	The equivalent rent that would be payable after all incentives (for example capital contributions and rent free periods) are taken into consideration. This calculation is used by the VOA to determine the actual Rateable Value. It is also used in lease negotiations to identify the appropriate level of rent.

TERM	DESCRIPTION
Occupancy Rates	The amount of built floor space which is occupied by a tenant or an owner-occupier. Occupancy rates do not include properties to purchase for investment purposes.
Parking Ratios	The number of car parking spaces available per 1,000 sq ft and dedicated to a particular property
Permitted Development Rights	Permission to carry out certain limited forms of development without the need to make an application to a local planning authority, as granted under the terms of the Town and Country Planning (General Permitted Development) Order.
Pre-Let	The letting of a property which is agreed and committed to prior to the commencement of the building's construction and therefore constitutes virtually no risk
Prime Capital Value	The price a purchaser can expect to pay for a 'best-in-class' property. A property with a low yield is considered to be 'prime'.
Prime Headline Rent	The rent expected to be agreed for a prime property in the prevailing market conditions, excluding unusual or abnormal landlord or tenant motivation.
Quoting Rent	The rent quoted to potential occupiers by letting agents, on either a per sq ft/sq m per annum basis, in respect of an available property.
Rental Values	The amount of rent a prospective tenant is justified in paying for a set period of time for the right to occupy and trade from the premises.
Speculative Development	A development which has commenced without having secured tenant(s) or purchaser(s) in place.
Take-Up	The measurement of the amount of space leased or sold within a given timeframe, normally per annum.
Use Class	The category of Town Planning Use to which the current or intended use of a property is allocated, as defined in the Town and Country Planning (Use Classes) Order 1987. This is a Statutory Instrument and is subject to periodic variation and updating.
Vacancy Rate	The percentage of built space in the market that is currently unoccupied or available for rent.
Voids	A term used to describe the length of time that properties have remained empty before a letting has been secured.
Yield	A measure of the return on a capital investment. A yield is the reciprocal of the multiplier that converts an income stream into a capital value, often expressed as the net initial yield having taken off purchaser's costs.
Yield Compression	Yield compression occurs when the net equivalent yield of a property decreases, measured in basis points and signifies an increase in capital value and higher return to the investor.

Appendix 1
Employment Site Assessment Pro Forma's and Location Maps

FBC EMPLOYMENT LAND STUDY – 2018

Site Address Land at Standard Way, Wallington			
Site Ref	20		
Ward	Fareham East	Size	0.59 Ha
Market Segment	B1, B2 or B8 uses		
Description of Site and Location:	<p>Up to 2,000 sq m</p> <p>The site is currently a vacant small paddock and is located to the east of Standard Way and to the north of Fareham Heights office park. The site is lined with trees and benefits from field access from Standard Way.</p> <p>This is a promoted site for employment allocation, where B1, B2 or B8 uses are proposed.</p>		
Market Attractiveness Criteria			
1.1: Has the site been formally identified for employment for at least 10 years?			No
1.2: Has there been any recent development activity, within the last 5 years?			No
1.3: Is the site being actively marketed as an employment site?			No
1.4: Is the site owned by a developer or another agency known to undertake employment development?			No
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?			No
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?			Yes
1.7: Is the site immediately available?			TBC
Market Appraisal	<p>The site lies within an area that has an overriding 'urban fringe' character, due to the adjoining industrial estate, waste transfer site and Fareham Heights office park, providing a good opportunity to extend the employment offering in this location. Access to this site can relatively easily be accommodated from Standard Way and is predominantly a level site.</p> <p>The location would have strong market appeal.</p>		
Adjacent land use and conflicts	<p>The site lies to the north of Sita waste transfer facility and Fort Wallington Industrial Estate. To the north of the site is the M27 motorway at Junction 11.</p>		
Known constraints and infrastructure requirements	<p>The site is mostly hidden by vegetation resulting in relatively limited visibility.</p> <p>This site would appear to have the potential for access created from Standard Way. For visibility and safety purposes the junction location would need to be towards the southern end of the frontage.</p> <p>Measures would also need to be put in place to limit additional commercial vehicle activity on Pinks Hill or to make width improvements along its length. A traffic master planning study is to be conducted by FBC on the Fort Wallington area.</p>		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.			No
2.2: Is the site identified or likely to be required for a specific user or specialist use?			No
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?			No
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?			No
Strategic Planning and Access	No relevant planning history post 2008.		
Recommendation	<p>Site Score D – Below Average.</p> <p>This site is well located and is flanked by neighbouring employment uses, making it a suitable site for further B uses.</p>		

459000

M 27

107000

0 20 40 m

FAREHAM
BOROUGH COUNCIL

SITE ID 20

STANDARD WAY, WALLINGTON



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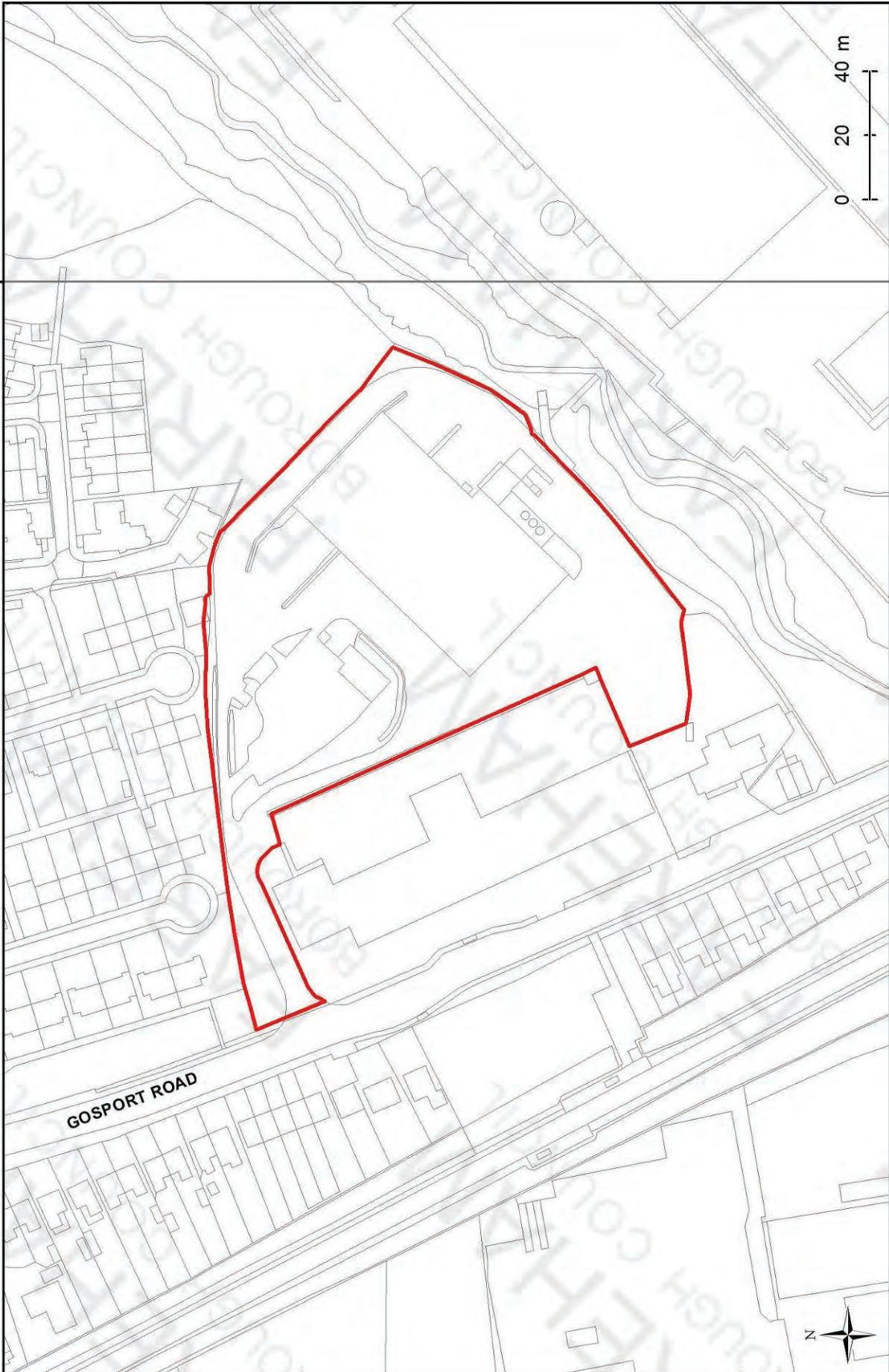
FBC EMPLOYMENT LAND STUDY – 2018

Site Address Fareham Industrial Estate and Broadcut			
Site Ref	39 (previously listed as 2985)		
Ward	Fareham East	Size	18.64 Ha
Market Segment	B1, B2, B8, sui generis, retail and open storage		
Description of Site and Location:	<p>Approximately 117,837 sq m The site is a well-established industrial location within the urban area on the edge of Fareham Town Centre. The site is mainly comprised of general industrial uses, with a number of large units on the eastern end of the site, with smaller units in the north western area. The central area of the site provides a mix of B2 and open storage businesses in a less coherent layout. The south western part of the site includes a small, relatively modern B1 office area (the Gardens) with three large retail units, including a Sainsbury's superstore, adjacent. The site benefits from good access to the M27 via Wallington Way.</p>		
Market Attractiveness Criteria			
1.1: Has the site been formally identified for employment for at least 10 years?			Yes
1.2: Has there been any recent development activity, within the last 5 years?			No
1.3: Is the site being actively marketed as an employment site?			Yes
1.4: Is the site owned by a developer or another agency known to undertake employment development?			Yes
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?			No
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?			N/A
1.7: Is the site immediately available?			Yes
Market Appraisal	<p>The site is a large established employment area, benefitting from a strong location close to the strategic road network as well as Fareham Town Centre. The existing buildings are mainly in good condition and of high quality, which is emphasised by the low vacancy level. The area is relatively spaced out, which positively influences the layout and environmental quality of the site. The combination of uses ensures a mix of tenants and adds to the vitality of the site as a whole.</p>		
Adjacent land use and conflicts	<p>The M27 lies to the north of the site. The surrounding areas are occupied by residential dwellings, allotments and a cemetery.</p>		
Known constraints and infrastructure requirements	<p>The site is adjacent to the Wallington conservation area to the south and a site of importance to nature conservation to the east.</p>		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.			No
2.2: Is the site identified or likely to be required for a specific user or specialist use?			No
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?			No
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?			N/A
Strategic Planning and Access	<p>The site has been subject to several change of use applications.</p>		
Recommendation	<p>Site Score B – Above Average. The site is a well-established industrial location with low vacancy rates, units of good/high quality, in a well located position.</p>		

FBC EMPLOYMENT LAND STUDY – 2018

Site Address Gosport Road Bus Depot			
Site Ref	40		
Ward	Fareham East	Size	2.16 Ha
Market Segment	Bus Depot		
Description of Site and Location:	<p>The site is currently a bus depot and lies in an employment area within an urban area. The southern border of the site forms part of Borough border with Gosport. The depot building is accessed via single track and consists of large corrugated sheds constructed to house and clean buses. There are some trees and landscaping at site entrance.</p>		
Market Attractiveness Criteria			
1.1: Has the site been formally identified for employment for at least 10 years?			No
1.2: Has there been any recent development activity, within the last 5 years?			No
1.3: Is the site being actively marketed as an employment site?			No
1.4: Is the site owned by a developer or another agency known to undertake employment development?			No
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?			No
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?			Yes
1.7: Is the site immediately available?			No
Market Appraisal	<p>The site presents an opportunity for development, however the lack of amenities and its position away from any centre mean the site is less suitable for B1 offices. The bus depot buildings are of low quality therefore it is unlikely to be easy to adapt to alternative uses if it were to become vacant.</p>		
Adjacent land use and conflicts	<p>Residential lies to the north of the site and industrial schemes lie to the south (Fareham Reach) and to the west (Newgate Lane).</p>		
Known constraints and infrastructure requirements	<p>The site is accessed via single track causing some congestion.</p>		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.			No
2.2: Is the site identified or likely to be required for a specific user or specialist use?			No
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?			No
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?			No
Strategic Planning and Access	<p>No relevant planning history post 2008.</p>		
Recommendation	<p>Site Score D – Below Average. The poor accessibility of the site may inhibit its appeal for industrial uses therefore it may be worthwhile considering alternative uses such as residential, should it become vacant or surplus to requirement.</p>		

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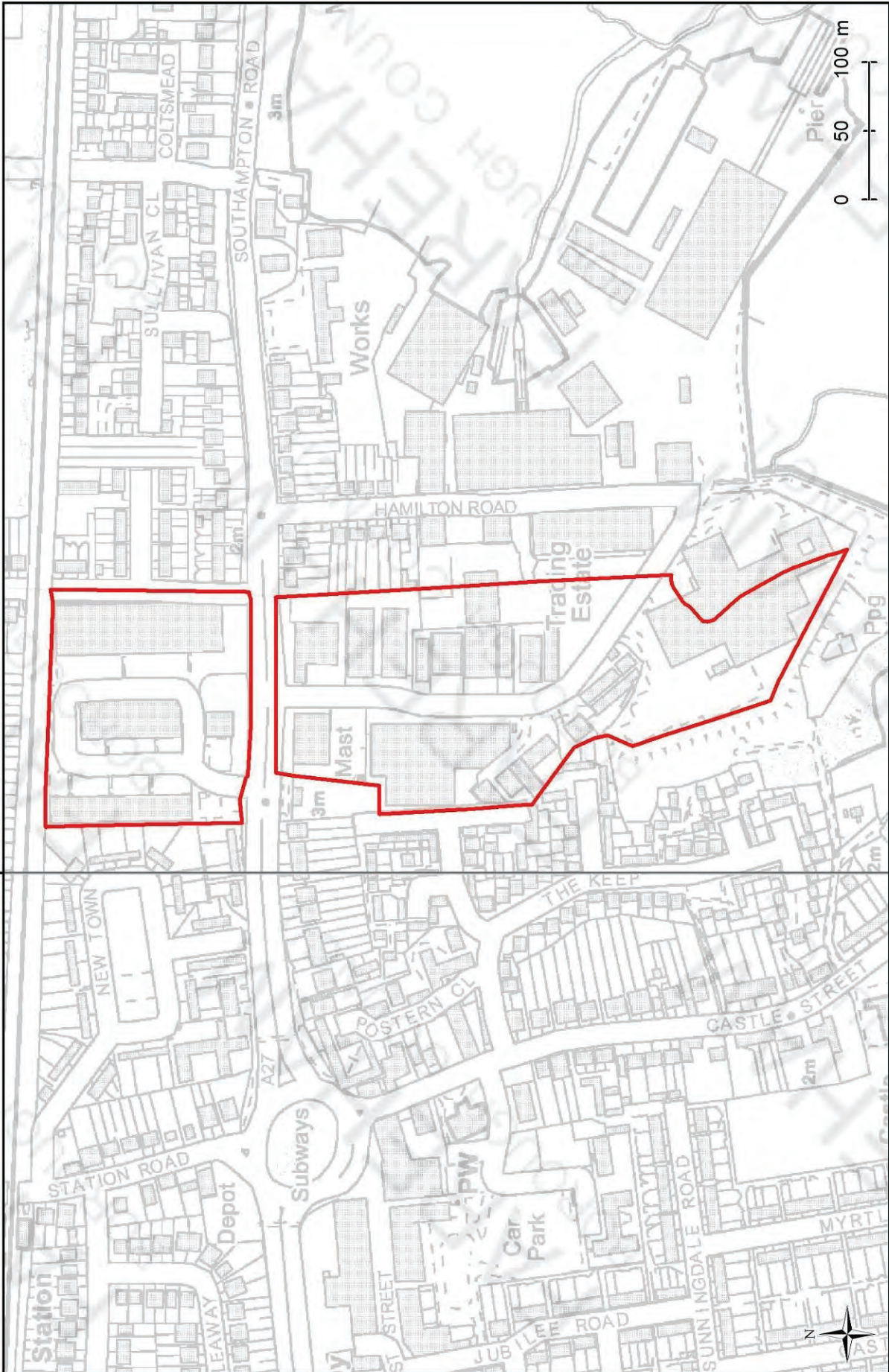
Site ID:40 - Bus Depot, Gosport Road

FBC EMPLOYMENT LAND STUDY – 2018

Site Address Castle Trading Estate & Murrills Estate, North & South of East Street			
Site Ref	63		
Ward	Portchester East	Size	7.45 Ha
Market Segment	B2, B1c and some retail units		
Description of Site and Location:	<p>50,783 sq ft of buildings</p> <p>Castle Trading Estate and Murrills Estate are well established business / industrial sites and employment areas, which are adjacent to Borough boundary with Portsmouth.</p> <p>Murrills Estate has three rows of mainly B2 units with direct access off of A27 to the south. The buildings on the estate are relatively modern and flexible.</p> <p>The area to the south is a more organic industrial estate, built either side of access road with units of varying age, scale and quality including some sui-generis and retail uses.</p>		
Market Attractiveness Criteria			
1.1: Has the site been formally identified for employment for at least 10 years?			Yes
1.2: Has there been any recent development activity, within the last 5 years?			No
1.3: Is the site being actively marketed as an employment site?			Yes
1.4: Is the site owned by a developer or another agency known to undertake employment development?			Yes
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?			Yes
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?			Yes
1.7: Is the site immediately available?			Yes
Market Appraisal	<p>The Castle Trading Estate and Murrills Estate combine to form the largest area of employment east of Fareham. They are well established industrial locations and benefit from low vacancy rates.</p> <p>The site is in relatively close proximity to Portchester District Centre which benefits the public transport links and local amenities. The site is also either side of the main, non-motorway, route from Portsmouth to Fareham making it prominent and easily accessible.</p>		
Adjacent land use and conflicts	Residential areas to north and west, with Portchester Castle Street conservation area, coastal zone and site of importance for nature conservation to south.		
Known constraints and infrastructure requirements	There are no known existing restraints.		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.			No
2.2: Is the site identified or likely to be required for a specific user or specialist use?			No
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?			No
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?			N/A
Strategic Planning and Access	<p>Castle Trading Estate - Various applications for changes of use; new Lidl supermarket erected in 2015 on sites where units 1-4 & 18 previously were.</p> <p>Murrills – various applications for changes of use.</p>		

Recommendation	Murrills Site Score B – Above Average Castle Trading Site Score C – Average. Castle Trading Estate and Murrills Estate are well located, established employment sites that have high occupancy rates and are well suited to this use.
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Site ID:63 - Castle Trading Estate & Murrills Estate

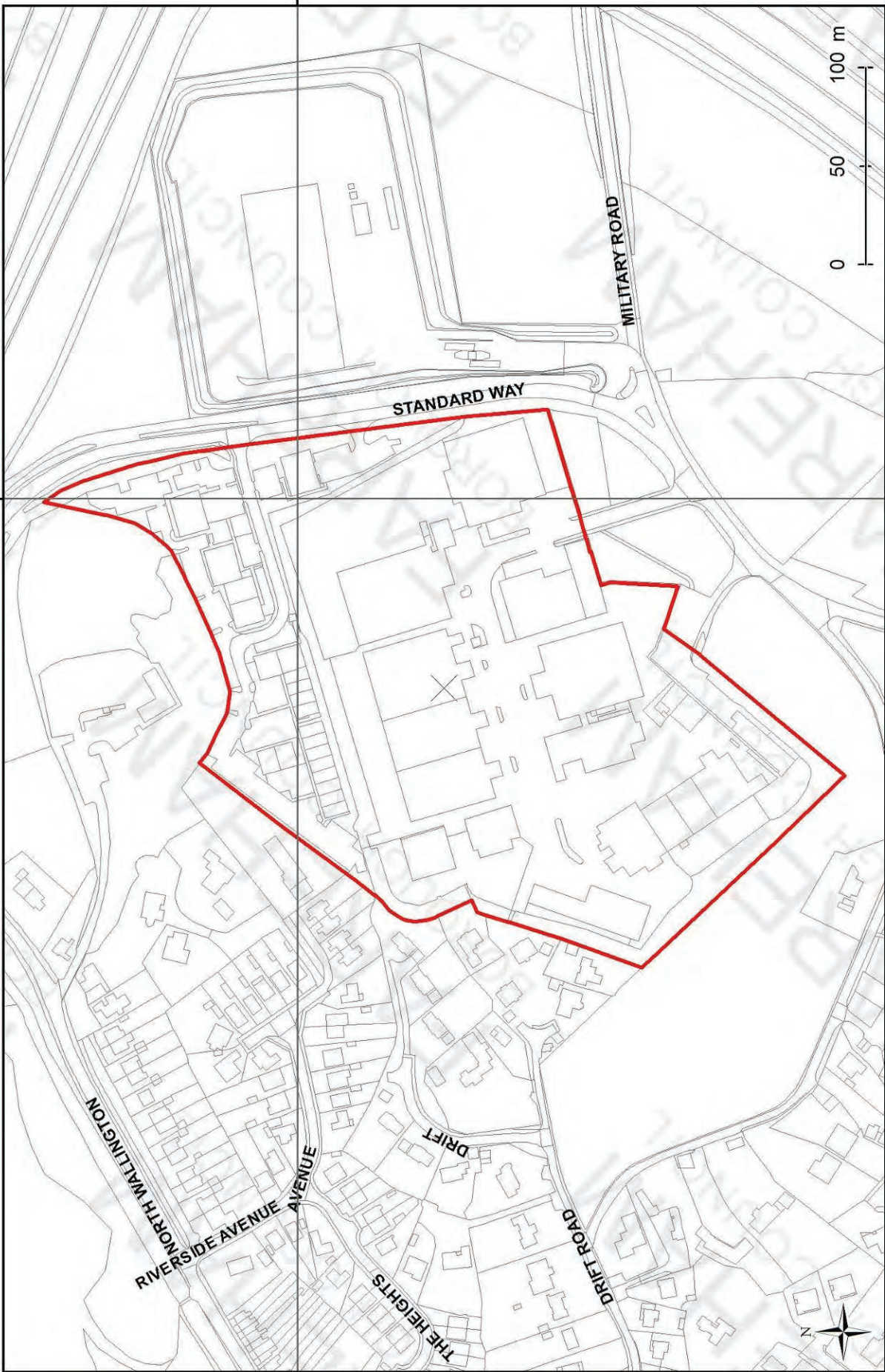
FBC EMPLOYMENT LAND STUDY – 2018

Site Address Fort Wallington Industrial Estate (North Wallington, off Standard Way)			
Site Ref	65		
Ward	Fareham East	Size	6.23 Ha
Market Segment	B1, B2 and B8 uses		
Description of Site and Location:	<p>39,524 sq m of buildings This site is situated adjacent to Junction 11 of the M27 and is within 2 miles of Fareham Town centre which offers a range of shopping facilities. The site is accessed via either Pinks Hill or Standard Way. This site comprises two distinct areas; Fareham Heights is a relatively modern B1 office park, laid out off of a single access road coming off of Standard Way. The area has ample designated parking areas set out with well-kept landscaping between. The Fort Wallington area is a less regular, general industrial area, hosting units of varying size and age. The boundary was extended in draft plan to include existing site to east.</p>		
Market Attractiveness Criteria			
1.1: Has the site been formally identified for employment for at least 10 years?			Yes
1.2: Has there been any recent development activity, within the last 5 years?			No
1.3: Is the site being actively marketed as an employment site?			Yes
1.4: Is the site owned by a developer or another agency known to undertake employment development?			Yes
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?			No
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?			Yes
1.7: Is the site immediately available?			Yes
Market Appraisal	<p>The site is a well-established employment location however it is relatively remote and isolated on the edge of the urban area. It is some distance from any local amenities or public transport provision, and it suffers from the regular congestion off of M27 junction 11, which negatively influences the ease of access to the site. The existing units are fairly flexible and in good condition, although expansion possibilities are likely to be limited due to the countryside boundary.</p>		
Adjacent land use and conflicts	<p>The site is surrounded by countryside and local gap to north and east, with residential to south and west.</p>		
Known constraints and infrastructure requirements	<p>Whilst Fareham Heights benefits from adequate parking the single vehicle access into this part of the site is often congested with parking, hinting to inadequate parking provision on the estate. The site therefore suffers from access constraints and congestion. The estate is also constrained in parts by the old boundary wall. The site is also some distance away from local amenities and public transport.</p>		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.			No
2.2: Is the site identified or likely to be required for a specific user or specialist use?			No
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?			No
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?			N/A

Strategic Planning and Access	The site has been subject to several change of use applications.
Recommendation	Site Score D – Below Average. The site is a well-established industrial and office location however it does suffering from congestion, poor connectivity to local amenities and inadequate parking provision on the industrial estate. However it is well occupied and a recognised employment location within the Borough.

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Site ID:65 - North Wallington

FBC EMPLOYMENT LAND STUDY – 2018

Site Address Newgate Lane & Speedfields			
Site Ref	74		
Ward	Stubbington, Fareham South	Size	27.04 Ha
Market Segment	B1, B2, B8 and sui generis uses		
Description of Site and Location:	<p>125,234 sq m of buildings. The site lies approximately within one mile south of Fareham Town Centre and is within two miles of the M27 Junction 11 (Fareham Central). The site is a large general employment area with large retail units mixed in, including an ASDA superstore. The units vary in size and scale, ranging from small industrial, storage units to large retail or sui-generis units. The area includes a concentration of car sales units, which front onto Newgate Lane, to the south of which is Collingwood Retail Park, which is home to a number of large leisure/retail units. The Apex Centre, located within the larger Speedfields Park retail area, is a B2/B8 business area made up of small, but relatively modern units.</p>		
Market Attractiveness Criteria			
1.1: Has the site been formally identified for employment for at least 10 years?			Yes
1.2: Has there been any recent development activity, within the last 5 years?			No
1.3: Is the site being actively marketed as an employment site?			Yes
1.4: Is the site owned by a developer or another agency known to undertake employment development?			Yes
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?			No
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?			Yes
1.7: Is the site immediately available?			Yes
Market Appraisal	<p>Site suffers due to reliance of access from Newgate Lane which is severely congested at peak times. Location away from any centres influences the strategic location, public transport and local amenities scores. The layout and single storey nature of the area lends itself to B2/B8 type businesses and any further expansion or intensification of the site, would most likely be for these uses.</p>		
Adjacent land use and conflicts	<p>The site forms the most south westerly tip of Fareham urban area, adjacent to HMS Collingwood to the west, countryside and strategic gap to the south and Gosport Borough boundary to the east.</p>		
Known constraints and infrastructure requirements	<p>The site suffers from congestion and is located some distance from local amenities.</p>		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.			No
2.2: Is the site identified or likely to be required for a specific user or specialist use?			No
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?			No
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?			N/A

Strategic Planning and Access	Speedfields Park: <ul style="list-style-type: none">• Proposal for erection of a Public House in 2002 was withdrawn.• Proposal for Lidl Foodstore (Use Class A1) with customer car park, associated landscaping and access works, following demolition of existing store & 10-23 Apex Centre 2018 – approved.
Recommendation	Site Score B – Above Average. The site is a popular employment location and is occupied by local and national operators for a variety of uses. Whilst the site suffers from congestion and poor access to local amenities, it remains a well-occupied employment site.



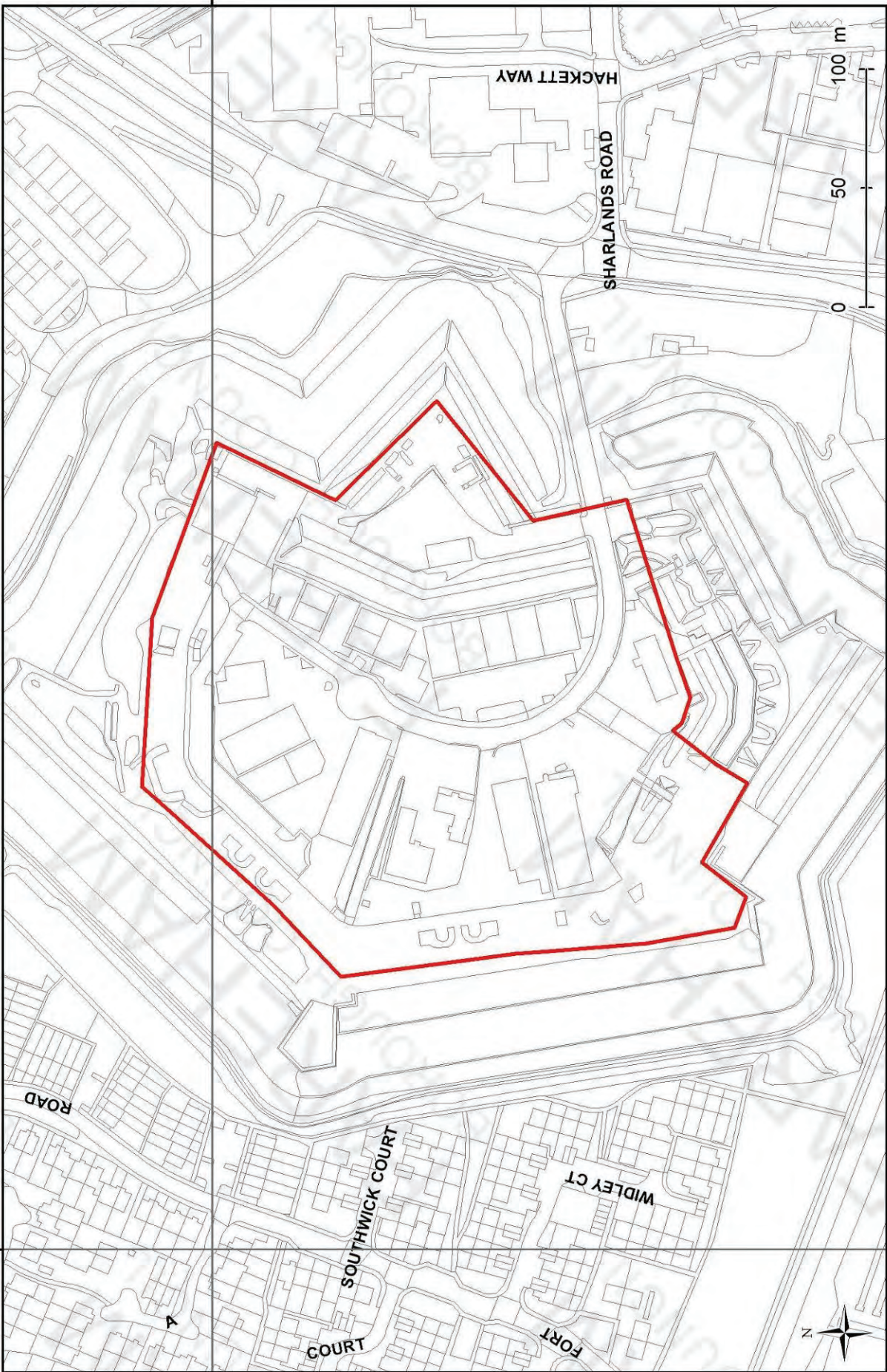
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Site ID:74 - Newgate Lane & Speedfields Park

FBC EMPLOYMENT LAND STUDY – 2018

Site Address Fort Fareham Industrial Estate, off Newgate Lane			
Site Ref	76		
Ward	Fareham South	Size	4.26 Ha
Market Segment	B1, B2, B8 and Sui Generis uses		
Description of Site and Location:	<p>14,228 sq m of buildings</p> <p>This site primarily offer B2 space and is an employment area set within the walls of a scheduled ancient monument. It is a general industrial area with a mixture of building types, styles with a variety of ages. Some units set within the walls of the fort itself, with interior units a mix of brick built blocks and purpose built industrial sheds. Most units are located off of single access road that links the site with Newgate Lane.</p>		
Market Attractiveness Criteria			
1.1: Has the site been formally identified for employment for at least 10 years?			Yes
1.2: Has there been any recent development activity, within the last 5 years?			No
1.3: Is the site being actively marketed as an employment site?			Yes
1.4: Is the site owned by a developer or another agency known to undertake employment development?			Yes
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?			No
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?			Yes
1.7: Is the site immediately available?			Yes
Market Appraisal	<p>The estate is located off of congested Newgate Lane and is set away from any centres, which adversely influences its suitability score, as does the potential conflict with conservation interests in the fort buildings. However, the site has a good layout and existing buildings are of a reasonable quality. Further expansion is however unlikely given the limited amount of space that exists within the walls.</p>		
Adjacent land use and conflicts	<p>The site is set within the walls of a scheduled ancient monument and is surrounded on all sides by site of nature conservation value.</p>		
Known constraints and infrastructure requirements	<p>The site suffers from congestion as it is access off Newgate Lane and is distanced from local amenities.</p>		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.			No
2.2: Is the site identified or likely to be required for a specific user or specialist use?			No
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?			No
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?			N/A
Strategic Planning and Access	<p>The site has been subject to several change of use applications.</p>		
Recommendation	<p>Site Score C – Average. Whilst the site is constrained, suffers from congestion and has a lack of local amenities, it is a good quality estate with ample parking, good space planning and has low vacancy rates.</p>		



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Site ID:76 - Fort Fareham

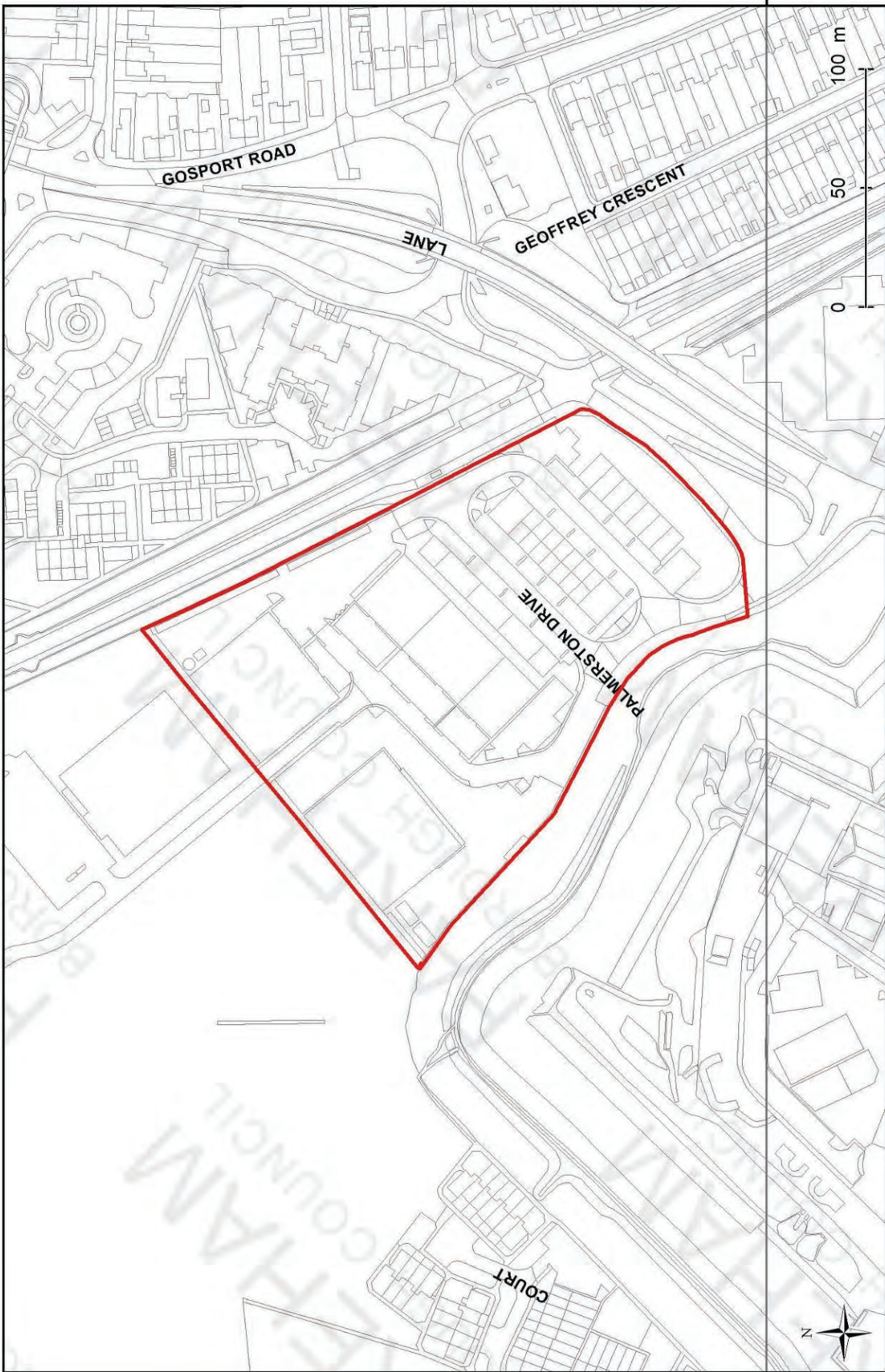
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FBC EMPLOYMENT LAND STUDY – 2018

Site Address Palmerston Business Park, off Newgate Lane			
Site Ref	77		
Ward	Fareham South	Size	2.84 Ha
Market Segment	B1, B2, B8		
Description of Site and Location:	<p>16,816 sq m of buildings. Palmerston Business Park is located approximately one mile south of Fareham town centre, providing accessibility to both the A27 and M27. Access to the estate is immediately off Newgate Lane or Palmerston Drive, located next to the new Bus Rapid Transport route, and approximately one mile from Collingwood Retail Park. Palmerston Business Park is a medium sized modern business park with predominantly B2 uses and some B1 and B8. The units vary in size, with smaller units being closer to Palmerston Drive and larger ones further to the north west. The units are set out in regular row formation, served by linked access roads.</p>		
Market Attractiveness Criteria			
1.1: Has the site been formally identified for employment for at least 10 years?			Yes
1.2: Has there been any recent development activity, within the last 5 years?			No
1.3: Is the site being actively marketed as an employment site?			Yes
1.4: Is the site owned by a developer or another agency known to undertake employment development?			Yes
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?			No
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?			Yes
1.7: Is the site immediately available?			Yes
Market Appraisal	<p>Site is more suitable for B2/B8, given the current nature of the buildings and the existing concentration of this type of use on site. The site is in an out of centre location which adversely influences its local amenities, strategic location and public transport scores. The site benefits from a simple layout and reasonably prominent location. Intensification of uses is unlikely to be possible given that units are terraced, but some units could be made two-storey.</p>		
Adjacent land use and conflicts	<p>The business park is adjacent to site of nature conservation value that surrounds Fort Fareham as well as the Bus Rapid Transport route and Cams Alders sports ground.</p>		
Known constraints and infrastructure requirements	<p>The site suffers from congestion as it is access off Newgate Lane and is distanced from local amenities.</p>		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.			No
2.2: Is the site identified or likely to be required for a specific user or specialist use?			No
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?			No
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?			N/A
Strategic Planning and Access	<p>The site has been subject to several change of use applications.</p>		

Recommendation	Site Score C – Average. The estate is a well configured relatively modern estate that is well established as an industrial location.
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Site ID:77 - Palmerston Business Park

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FBC EMPLOYMENT LAND STUDY – 2018

Site Address Segensworth South Industrial Estate, North & South (Kites Croft) of Southampton Road			
Site Ref	78		
Ward	Titchfield, Titchfield Common	Size	40.40 Ha
Market Segment	B1, B2 and sui generis		
Description of Site and Location:	<p>283,223sq.m of buildings. Segensworth South Industrial Estate and Kites Croft is located a short distance from Junction 9 of the M27 between Segensworth and Fareham. This site forms one of the largest employment areas in the Borough and includes Office for National Statistics buildings, Kites Croft Business Park and all other buildings in employment use between Southampton Road and Segensworth Road. The larger area to the north of the A27 provides a wide range of B1 and B2 units, with modern B2 units in cul-de-sac layouts off of Cartwright Drive to the east. Kites Croft to the south of the A27 is a modern business park consisting of mostly large units off of a single access road.</p>		
Market Attractiveness Criteria			
1.1: Has the site been formally identified for employment for at least 10 years?			Yes
1.2: Has there been any recent development activity, within the last 5 years?			Yes
1.3: Is the site being actively marketed as an employment site?			Yes
1.4: Is the site owned by a developer or another agency known to undertake employment development?			Yes
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?			No
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?			Yes
1.7: Is the site immediately available?			Yes
Market Appraisal	<p>Site forms one of the largest areas of employment uses in the Borough and has an established mix of B use classes. The general feel of the area is low level B2/B8, although there are a number of large B1 buildings. The site is located away from local amenities and suffers from congestion, but has a good layout and, in parts, very high quality buildings. There are some spaces across the area that have yet to be built out (the most prominent are considered as sites 2001, 2004 & 2005). Other areas could be more intensively used as some of the units are relatively spread out.</p>		
Adjacent land use and conflicts	<p>Kites Croft is bordered to the west and north by a site of importance for nature conservation, whilst the whole site forms the eastern edge of Western Wards urban boundary.</p>		
Known constraints and infrastructure requirements	<p>The site is located away from local amenities and suffers from congestion.</p>		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.			No
2.2: Is the site identified or likely to be required for a specific user or specialist use?			No
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?			No

2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?	N/A
Strategic Planning and Access	No relevant planning history from 2008 onwards.
Recommendation	Site Score A – High. The site is a well-established industrial location with scope for further development and intensification.

FBC EMPLOYMENT LAND STUDY – 2018

Site Address Segensworth East Industrial Estate, Brunel Way & Barnes Wallis Road			
Site Ref	79		
Ward	Titchfield	Size	35.2 Ha
Market Segment	B1, B2 and B8		
Description of Site and Location:	<p>195,492 sq m of buildings This employment area is located to south of M27 adjacent to junction 9. It is a large business park of generally low intensity uses with a range of building styles of mostly 2 storey. Set along two main access roads (Barnes Wallis Road and Brunel Way) with decent levels of landscaping and on-site parking. Most buildings are relatively modern in nature, and sizes of units are ranging, but most are relatively large in scale. There are multiple access points to site, including easy access to Segensworth roundabout and Junction 9 of the M27.</p>		
Market Attractiveness Criteria			
1.1: Has the site been formally identified for employment for at least 10 years?	Yes		
1.2: Has there been any recent development activity, within the last 5 years?	No		
1.3: Is the site being actively marketed as an employment site?	Yes		
1.4: Is the site owned by a developer or another agency known to undertake employment development?	Yes		
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?	No		
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?	Yes		
1.7: Is the site immediately available?	Yes		
Market Appraisal	<p>Site scores well due to the existing employment/general industrial nature of the area, and the reasonable quality of the existing buildings. Site suffers from peak time congestion and a lack of local amenities and public transport services, but has good environmental quality due to landscaping and low density and has a good layout. The low density does allow for some room for expansion and/or intensification.</p>		
Adjacent land use and conflicts	<p>The site forms part of the Segensworth employment areas at Junction 9 of the M27. This employment area which forms the border between Fareham Borough and Winchester District.</p>		
Known constraints and infrastructure requirements	<p>The site suffers from peak time congestion and a lack of local amenities.</p>		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.	No		
2.2: Is the site identified or likely to be required for a specific user or specialist use?	No		
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?	No		
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?	N/A		
Strategic Planning and Access	<p>Various change of use applications; extensions to existing properties and the erection of two storey business block (Class B1) adjacent to the waste management station in Barnes Wallis Road.</p>		

Recommendation	Site Score A – High. The site is an employment location offering a range of all B uses. It is conveniently located adjacent to the M27 at Junction 9 and whilst lacks local amenities and public transport is a popular business location.
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FBC EMPLOYMENT LAND STUDY – 2018

Site Address Segensworth West Industrial Estate, off Little Park Farm Road			
Site Ref	80		
Ward	Park Gate	Size	23.37 Ha
Market Segment	B1 and B2		
Description of Site and Location:	<p>70,964 sq m of buildings This employment area is located to south of M27 adjacent to junction 9. It is a large general employment area made up of a mixture of B1 office buildings and B2 units. It has relatively modern character of buildings which vary in size and style, good landscaping and low density gives site an open and low intensity feel. General layout is a grid pattern, although there are only two access points into and out of the area, with Little Park Farm Road joining the site to Segensworth roundabout and Telford Way linking the site to Park Gate.</p>		
Market Attractiveness Criteria			
1.1: Has the site been formally identified for employment for at least 10 years?			Yes
1.2: Has there been any recent development activity, within the last 5 years?			No
1.3: Is the site being actively marketed as an employment site?			Yes
1.4: Is the site owned by a developer or another agency known to undertake employment development?			Yes
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?			No
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?			Yes
1.7: Is the site immediately available?			Yes
Market Appraisal	<p>Site scores well in most categories, although it does suffer from peak time congestion. The area benefits from modern and flexible existing buildings ensure along with high environmental quality, good quality road access and a relatively prominent location. The site is reasonably close to Park Gate Local Centre, which ensures it has reasonable public transport links. Possibility for intensification of uses given layout and extension north into Little Park Farm (site 123).</p>		
Adjacent land use and conflicts	<p>The site has residential to south and west and employment allocation to north.</p>		
Known constraints and infrastructure requirements	<p>The site suffers from peak time congestion and a lack of local amenities.</p>		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.			No
2.2: Is the site identified or likely to be required for a specific user or specialist use?			No
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?			No
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?			N/A
Strategic Planning and Access	<p>Various change of use applications and extensions. Erection of factory assembly unit (Class B1 (C)) with associated parking & landscaping – 7 Little Park Farm Road; erection of 3 storey office building (Eaglepoint).</p>		
Recommendation	<p>Site Score A – High. The site is an employment location offering a range of all B uses. It is conveniently located adjacent to the M27 at Junction 9 and whilst lacks local amenities and public transport is a popular business location.</p>		



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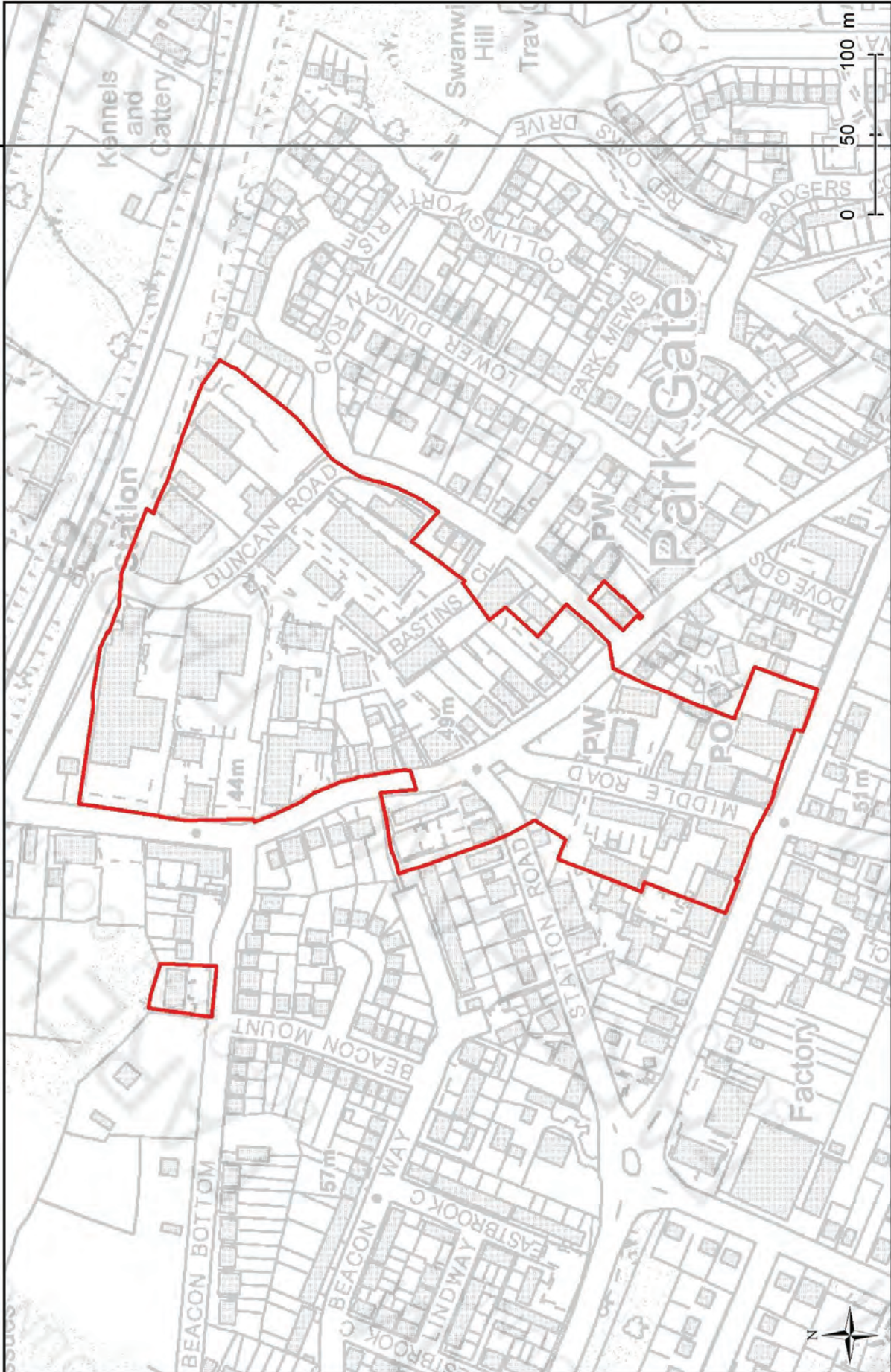
Site ID:80 - Segensworth West Industrial Estate

FBC EMPLOYMENT LAND STUDY – 2018

Site Address Park Gate Centre & North (Park Gate Employment Area, Botley Road and Duncan Road)			
Site Ref	81		
Ward	Park Gate	Size	7.79 Ha
Market Segment	B1, B2 retail and sui generis		
Description of Site and Location:	<p>32,067 sq m of buildings The area is located off Botley Road and links to the M7 at junction 9. The site has two distinct areas; the Duncan Road area to the north of the site is a B2 dominated area, with some large units alongside rows of smaller units. This area is adjacent to Swanwick station and accessed via Duncan Road which links to Botley Road at two points. The southern area of the site is Park Gate Local Centre, which is home to a concentration of B1/A2 office buildings along Botley Road. The majority of these are converted residential units, with a few purpose built office buildings such as Lathkill House and Richmond Court. The Local Centre is also home to some smaller employment buildings on the south and west outskirts.</p>		
Market Attractiveness Criteria			
1.1: Has the site been formally identified for employment for at least 10 years?			Yes
1.2: Has there been any recent development activity, within the last 5 years?			No
1.3: Is the site being actively marketed as an employment site?			Yes
1.4: Is the site owned by a developer or another agency known to undertake employment development?			No
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?			Yes
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?			Yes
1.7: Is the site immediately available?			Yes
Market Appraisal	<p>The site encompasses all of Park Gate Local Centre and therefore scores well in terms of its strategic location, the local amenities on offer and its public transport links. The existing buildings are of relatively good quality, with the amount of residential conversions showing the flexibility of the buildings in the area. Congestion remains a problem and any intensification or expansion of employment uses in the area will need to take account of neighbouring residential and retail units.</p>		
Adjacent land use and conflicts	<p>The site is primarily surrounded by residential dwellings with Swanwick train station to the north of the site.</p>		
Known constraints and infrastructure requirements	<p>The location suffers from congestion.</p>		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.			No
2.2: Is the site identified or likely to be required for a specific user or specialist use?			No
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?			No
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?			N/A

Strategic Planning and Access	Duncan Road/Lower Duncan Road – various change of use applications; variation of contracts; residential development. Botley Road/Duncan Road – demolish shop and erect flats. 4-14 Botley Road – land, demolition of existing building for the building of retirement flats.
Recommendation	Site Score C – Average. The site is a typical local centre with a mix of uses and a number of converted buildings. It is well located with local transport links and local amenities.

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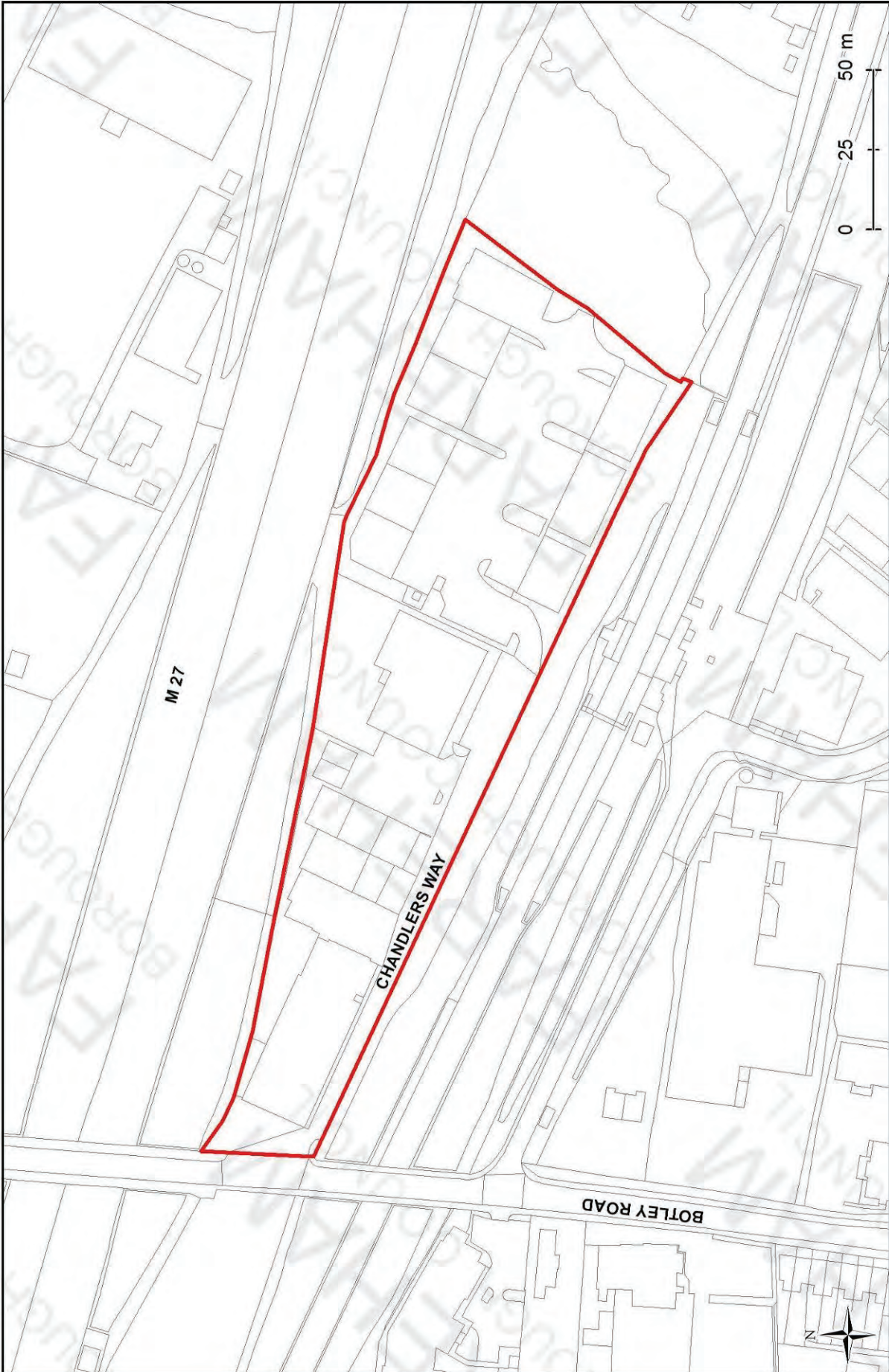
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FAREHAM
BOROUGH COUNCIL

Site ID:81 - Park Gate Employment Area

FBC EMPLOYMENT LAND STUDY – 2018

Site Address Park Gate Business Centre, Chandlers Way (off Botley Road)			
Site Ref	82		
Ward	Park Gate	Size	1.7 Ha
Market Segment	B1, B2 and B8		
Description of Site and Location:	<p>11,658 sq m of buildings Park Gate Business Centre is an industrial area comprising mostly B2 uses and is located to the east of Botley Road, north of Park Gate Local Centre and Swanwick Railway Station. The estate offers units of varying sizes, with a single large unit fronting Botley Road, to the south of which is the single access point for the larger business park in behind.</p>		
Market Attractiveness Criteria			
1.1: Has the site been formally identified for employment for at least 10 years?			Yes
1.2: Has there been any recent development activity, within the last 5 years?			No
1.3: Is the site being actively marketed as an employment site?			Yes
1.4: Is the site owned by a developer or another agency known to undertake employment development?			Yes
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?			Yes
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?			Yes
1.7: Is the site immediately available?			Yes
Market Appraisal	<p>Site's proximity to Park Gate Local Centre and railway station positively influences its scores for public transport, local amenities and strategic location. Buildings are of a reasonable quality and set out in a clear fashion which results in good suitability scores for all use classes. There is limited room for expansion given the proximity of the railway and motorway, although land to the east is allocated for employment uses (Little Park Farm, site 123).</p>		
Adjacent land use and conflicts	<p>This employment area is adjacent to an existing employment allocation at Little Park Farm. There is countryside to the north and west.</p>		
Known constraints and infrastructure requirements	<p>Limited scope for expansion.</p>		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.			No
2.2: Is the site identified or likely to be required for a specific user or specialist use?			No
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?			No
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?			N/A
Strategic Planning and Access	<p>Change of use application.</p>		
Recommendation	<p>Site Score C – Average. The site is well suited to this use; flanked by both a railway line and M27 motorway. The site offers little scope for further intensification or expansion.</p>		



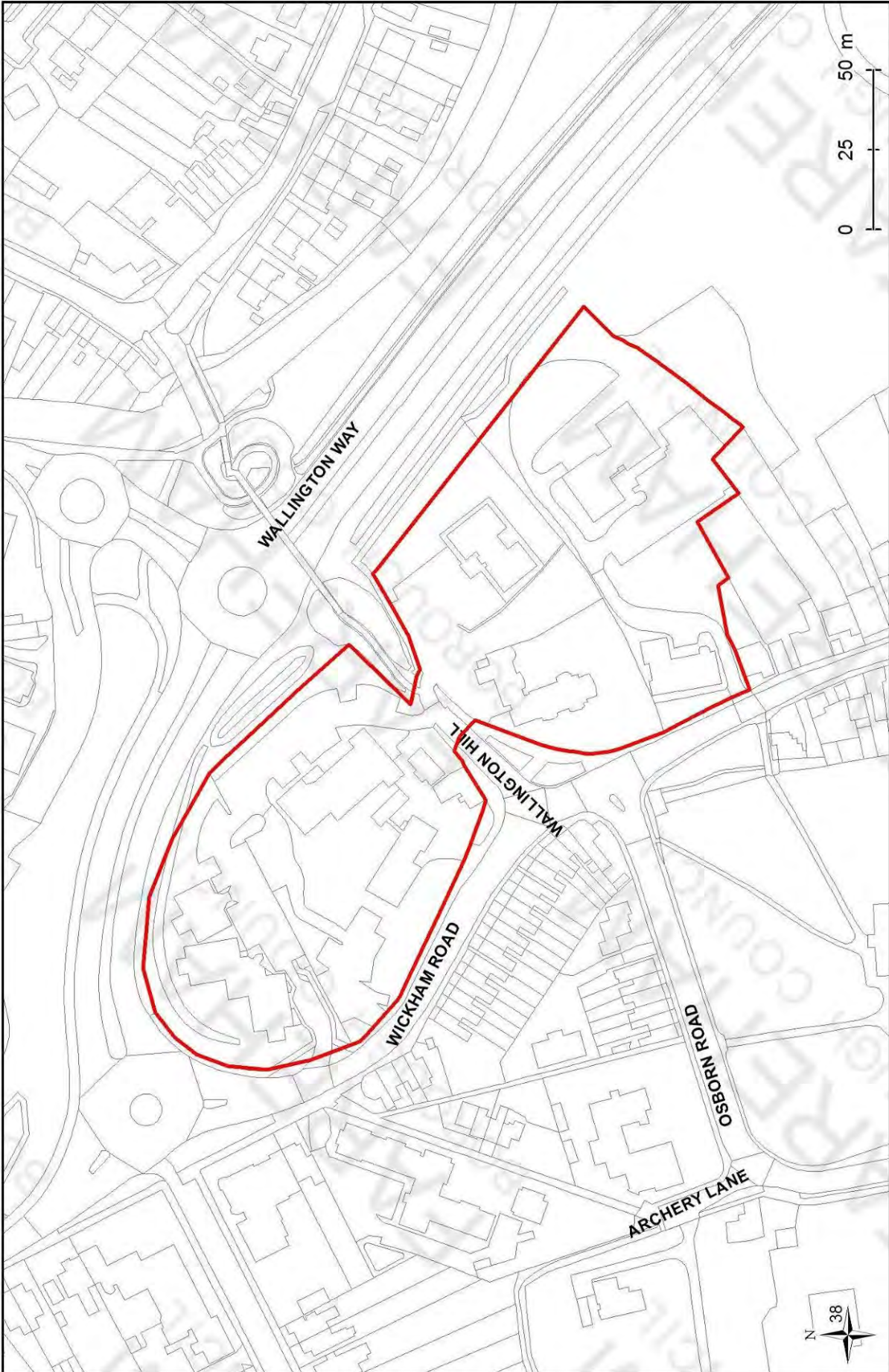
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Site ID:82 - Park Gate Business Centre

FBC EMPLOYMENT LAND STUDY – 2018

Site Address Part of Fareham Point, Wickham Road & North End of High Street			
Site Ref	84		
Ward	Fareham East	Size	Over 2 Ha
Market Segment	B1		
Description of Site and Location:	<p>Fareham Point is located on Wallington Way and short distance from A27. The site comprises of a number of buildings varying in height, size and design occupied by B1 businesses. The area incorporates Fareham Point, Wates House, The Old Manor House and two Old Manor Cottages to the north east and 43 Shiplands House, Nicholson Gate, 44 and 44A High Street to the south east.</p> <p>Vehicular access to the site is from the High Street and Wickham Road.</p>		
Market Attractiveness Criteria			
1.1: Has the site been formally identified for employment for at least 10 years?			Yes
1.2: Has there been any recent development activity, within the last 5 years?			No
1.3: Is the site being actively marketed as an employment site?			Yes
1.4: Is the site owned by a developer or another agency known to undertake employment development?			Yes
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?			No
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?			Yes
1.7: Is the site immediately available?			Yes
Market Appraisal	<p>The site lies at A32 roundabout and within close proximity to M27 and Fareham Town Centre which provides good public transport links, and is the largest retail area in the Borough. It consists of a number of buildings of quality architectural style, including a listed building, designed for B1 use. The site is well landscaped and offers simple and easy layout and sufficient car parking provision.</p>		
Adjacent land use and conflicts	<p>The site is bounded by A27 to the north and east, green open space to the south east, residential properties to the south west and Wickham Road to the west.</p>		
Known constraints and infrastructure requirements	<p>Within High Street Conservation Area, a grade 2* listed building within the site (The Old Manor House). Eastern parts of the site within floodzone 2 and 3.</p>		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.			No
2.2: Is the site identified or likely to be required for a specific user or specialist use?			No
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?			No
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?			No
Strategic Planning and Access	<p>Fareham Point – change of use from offices to residential. High Street – change of use from commercial to residential.</p>		
Recommendation	<p>Site Score C - Average. Part of the site has been redeveloped for residential with the remainder offering B1 office space. The site is well located for this use with ample car parking.</p>		



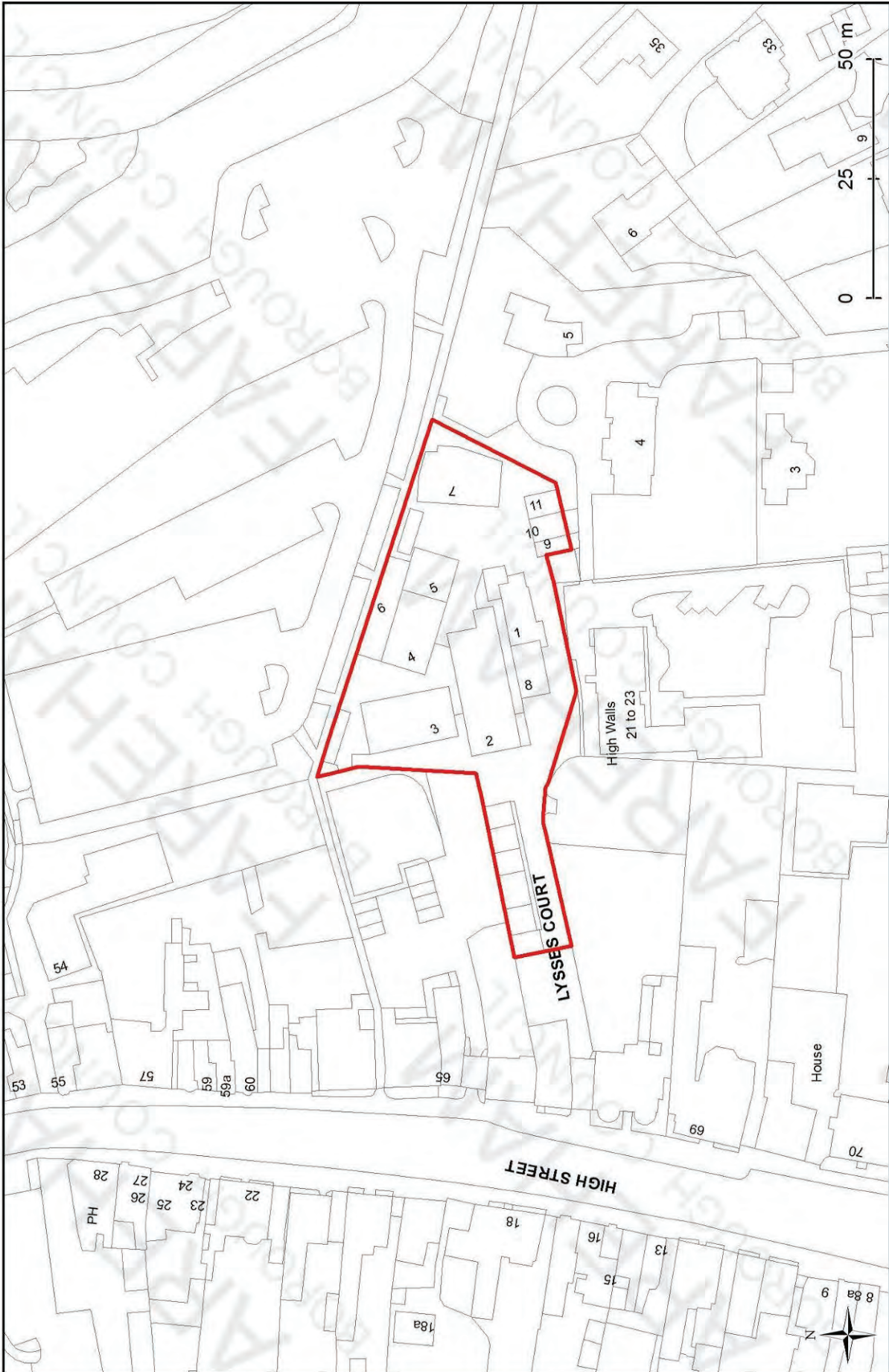
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Site ID:84 - Fareham Point & High Street

FBC EMPLOYMENT LAND STUDY – 2018

Site Address Lysses Court			
Site Ref	85		
Ward	Fareham East	Size	0.32 Ha
Market Segment	B1, B2, D2 and sui generis		
Description of Site and Location:	<p>2,968 sq m</p> <p>The site is located off the High Street in Fareham Town Centre and is located adjacent to High Walls (161). The site comprises a mixture of units in a variety of units of different ages. The site is located via a narrow and low entrance off of High Street and is a mixture of low rise buildings of relatively poor quality with some surface parking. Some of the accesses to individual units are narrow and the site is surrounded by residential and office buildings.</p>		
Market Attractiveness Criteria			
1.1: Has the site been formally identified for employment for at least 10 years?			Yes
1.2: Has there been any recent development activity, within the last 5 years?			No
1.3: Is the site being actively marketed as an employment site?			Yes
1.4: Is the site owned by a developer or another agency known to undertake employment development?			Yes
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?			Yes
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?			Yes
1.7: Is the site immediately available?			Yes
Market Appraisal	<p>The site is located within the Town Centre and has good links to services but is not prominent and has very limited road access, especially for larger vehicles which restricts the types of uses that can occupy the units. Expansion or intensification opportunities are limited given the constricted nature of the site and its location within the conservation area.</p>		
Adjacent land use and conflicts	<p>An employment area in the urban area and High Street conservation area.</p>		
Known constraints and infrastructure requirements	<p>There is a narrow and low entrance restricting access for larger vehicles. There is limited scope for expansion.</p>		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.			No
2.2: Is the site identified or likely to be required for a specific user or specialist use?			No
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?			No
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?			N/A
Strategic Planning and Access	<p>No relevant planning history.</p>		
Recommendation	<p>Site Score D – Below Average. The site has high site coverage and restricted access. Due to the sites location and its position within a conservation area, the site does provide medium to long term redevelopment prospects, however it does currently offer good start up facilities.</p>		



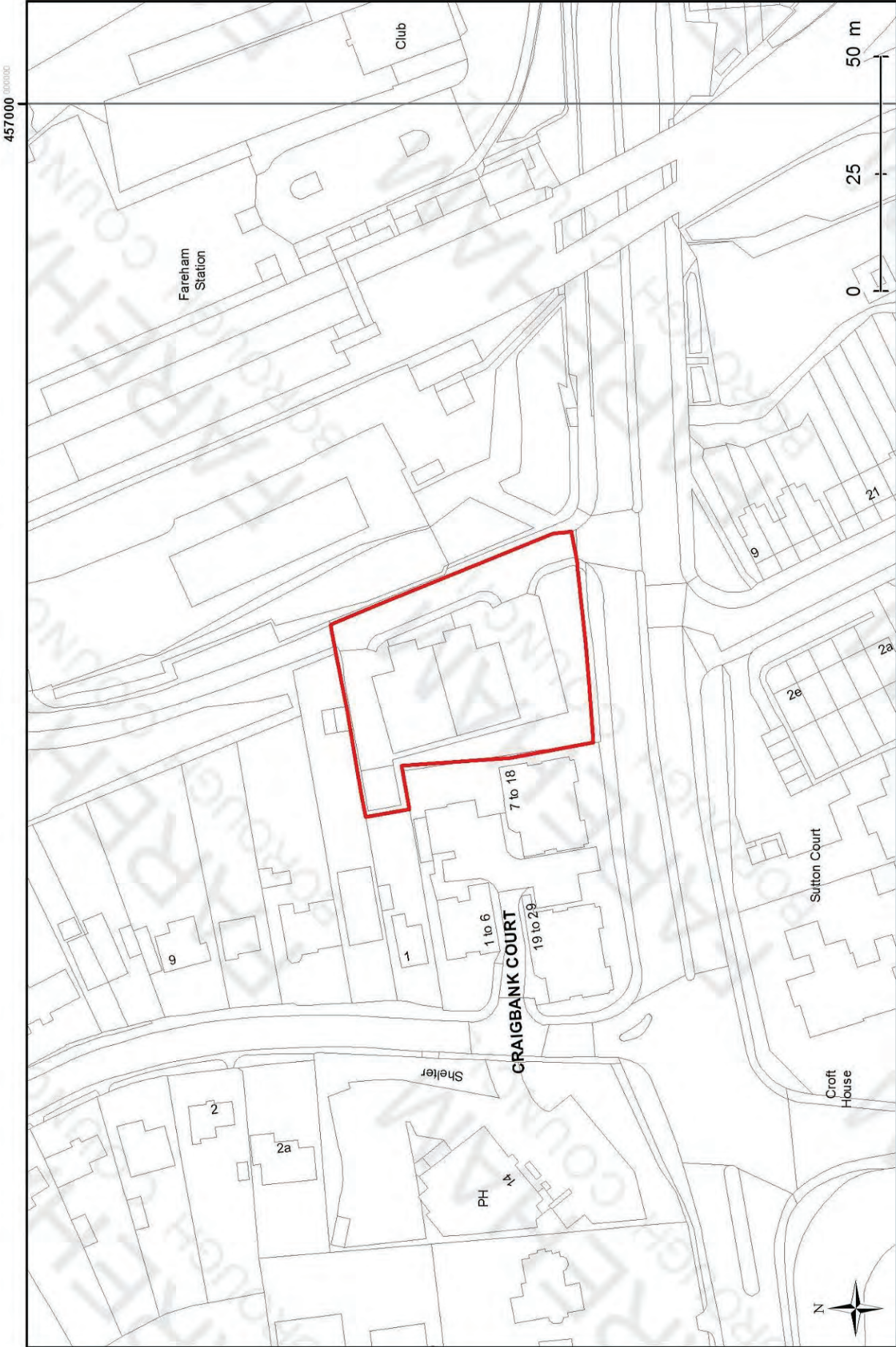
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Site ID:85 - Lysses Court

FBC EMPLOYMENT LAND STUDY – 2018

Site Address 1&2 The Avenue			
Site Ref	86		
Ward	Fareham North	Size	0.19 Ha
Market Segment	B1c/B2 and retail		
Description of Site and Location:	557 sq m The site is conveniently located off the A27 and is adjacent to both Fareham Station and the Town Centre. The site comprises two single storey industrial units adjacent to Fareham Station.		
Market Attractiveness Criteria			
1.1: Has the site been formally identified for employment for at least 10 years?			Yes
1.2: Has there been any recent development activity, within the last 5 years?			No
1.3: Is the site being actively marketed as an employment site?			No
1.4: Is the site owned by a developer or another agency known to undertake employment development?			No
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?			No
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?			Yes
1.7: Is the site immediately available?			No
Market Appraisal	The proximity of the site to the Town Centre and public transport links makes this site well suited for a more intensive use. Any proposal for redevelopment would need to consider the residential nature of neighbouring properties.		
Adjacent land use and conflicts	Surrounded by residential development on three sides, with unused shrub land belonging to the railway station to the east.		
Known constraints and infrastructure requirements	The site is surrounded by residential and is adjacent to the Town Centre boundary (as defined in the Town Centre Area Action Plan Issues & Options) as well as land safeguarded for Bus Rapid Transport route into Fareham Station.		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.			No
2.2: Is the site identified or likely to be required for a specific user or specialist use?			Yes
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?			No
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?			N/A
Strategic Planning and Access	Units 1 & 2 The Avenue Fareham PO14 1NP Proposal: Demolition Of Existing Industrial Units And Erection Of Nine Dwellings; Decision Date: 15/02/2011 Status: Appealed: Dismissed		
Recommendation	Site Score C – Average. The site is undeveloped and lends itself to further development. Its location close to amenities and road and rail links makes this a suitable employment site; however it is constrained due to its proximity to the surrounding residential dwellings.		



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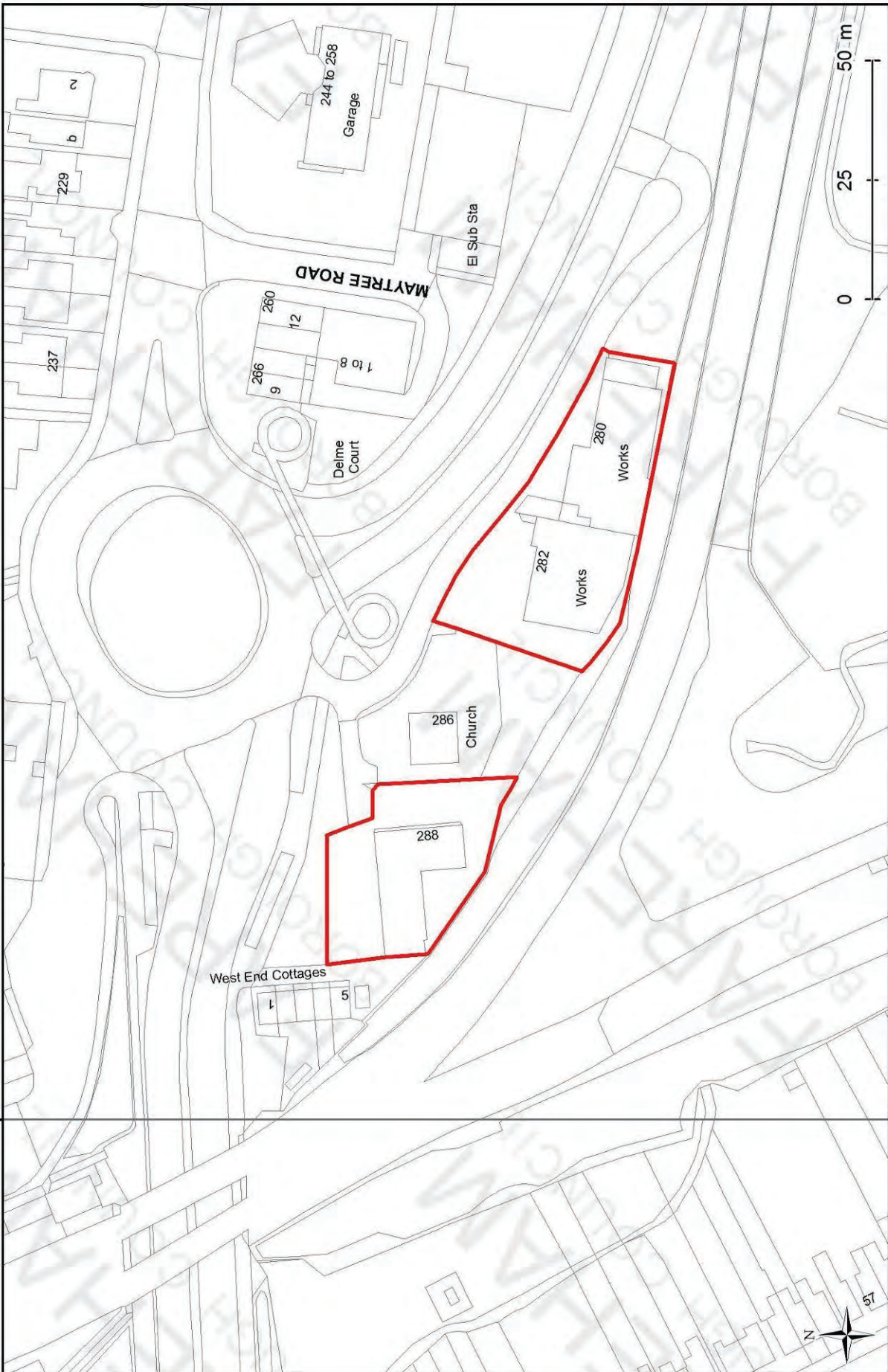
FAREHAM
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Site ID:86 - 1&2 The Avenue

FBC EMPLOYMENT LAND STUDY – 2018

Site Address West End (West), South of Station Roundabout			
Site Ref	87		
Ward	Fareham North	Size	0.16 Ha
Market Segment	B1 B8		
Description of Site and Location:	<p>1,300 sq m A series of single and two storey buildings joined up together with adjacent car parking to the north, west and east. Site lies within an employment area, just outside of Fareham Town Centre boundary.</p>		
Market Attractiveness Criteria			
1.1: Has the site been formally identified for employment for at least 10 years?			Yes
1.2: Has there been any recent development activity, within the last 5 years?			No
1.3: Is the site being actively marketed as an employment site?			Yes
1.4: Is the site owned by a developer or another agency known to undertake employment development?			No
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?			No
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?			Yes
1.7: Is the site immediately available?			Yes
Market Appraisal	<p>This compact site is located within close proximity to Fareham Train Station and Fareham Town Centre, which makes the site easily accessible by public transport. The site offers good access to road network, including A27 and motorway M27, however there might be some slight delays and risk of traffic jams at peak hours. The site currently does not offer good HGVs access as the site access and egress is via tight turns. Close proximity to Fareham Town Centre provides good retail and residential offer. However, due to physical boundaries, opportunities for further expansion are limited.</p>		
Adjacent land use and conflicts	<p>The site is bounded by A27 to the north, railway line to the south and a church to the north west. Planned expansion of the A27 to include a new bus lane will reduce the landscaping and tree buffer between the site and the main road.</p>		
Known constraints and infrastructure requirements	<p>The site currently does not offer good HGVs access.</p>		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.			No
2.2: Is the site identified or likely to be required for a specific user or specialist use?			Yes
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?			Yes
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?			N/A
Strategic Planning and Access	<p>Note – unsure what area to look for on FBC planning portal.</p>		
Recommendation	<p>Site Score C – Average. Whilst site has restricted HGV access, employment uses are appropriate in this location. The site offers prominent road frontage, however the units appear a little dated and could be enhanced.</p>		

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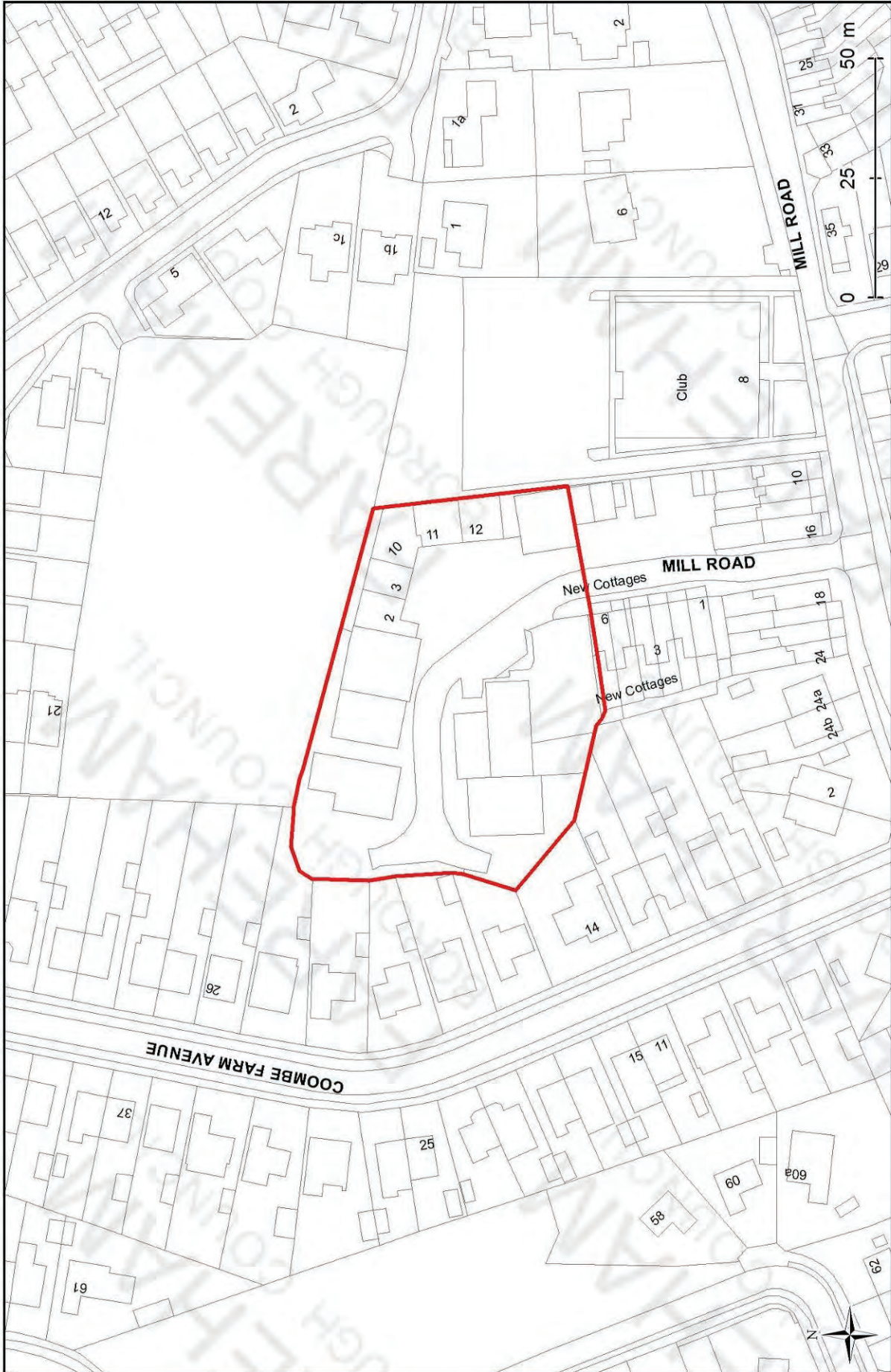
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Site ID: 87 & 88 - West End (east & west)

FBC EMPLOYMENT LAND STUDY – 2018

Site Address Boatyard Industrial Estate, Mill Road			
Site Ref	90		
Ward	Fareham South	Size	0.42 Ha
Market Segment	B2		
Description of Site and Location:	<p>2,297 sq m of buildings The site comprises a small industrial estate with mainly low level small/medium sized industrial units. The site forms the end of Mill Road cul-de-sac and has relatively poor access to the strategic road network.</p>		
Market Attractiveness Criteria			
1.1: Has the site been formally identified for employment for at least 10 years?			Yes
1.2: Has there been any recent development activity, within the last 5 years?			No
1.3: Is the site being actively marketed as an employment site?			Yes
1.4: Is the site owned by a developer or another agency known to undertake employment development?			No
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?			No
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?			Yes
1.7: Is the site immediately available?			Yes
Market Appraisal	<p>The site is located away from the strategic road network, in a predominantly residential area which limits the types of uses possible and/or acceptable. The poor prominence of the site coupled with its existing B2 nature renders it less suitable for B1 development than B2/B8. The site is quite intensively used already making further intensification unlikely. There are limited options for expansion as well.</p>		
Adjacent land use and conflicts	<p>An employment area with designated open space Briarwood Close Field to the north.</p>		
Known constraints and infrastructure requirements	<p>The site suffers from poor access and is a residential area.</p>		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.			No
2.2: Is the site identified or likely to be required for a specific user or specialist use?			Yes
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?			No
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?			N/A
Strategic Planning and Access	<p>No relevant planning history.</p>		
Recommendation	<p>Site Score D – Below Average. Although the location poses some restrictions and reduces its market appeal, it is an intensively used site and serves a place within the market.</p>		



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Site ID:90 - Boatyard Industrial Estate

FBC EMPLOYMENT LAND STUDY – 2018

Site Address Lower Quay & Quayside			
Site Ref	91		
Ward	Fareham East	Size	0.45 Ha
Market Segment	B1, B2		
Description of Site and Location:	<p>3,605 sq m of buildings The site is located on Lower Quay Road off the A32, south of Fareham Town Centre. The site is formed of purpose built employment buildings or converted residential buildings within a wider mixed use area which focuses on the marine sector. Majority of the buildings are of high aesthetic quality and positively add to the conservation area.</p>		
Market Attractiveness Criteria			
1.1: Has the site been formally identified for employment for at least 10 years?			Yes
1.2: Has there been any recent development activity, within the last 5 years?			No
1.3: Is the site being actively marketed as an employment site?			Yes
1.4: Is the site owned by a developer or another agency known to undertake employment development?			No
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?			No
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?			Yes
1.7: Is the site immediately available?			Yes
Market Appraisal	<p>The site benefits from reasonable proximity to Fareham Town Centre and subsequent public transport links. Conservation area location ensures reasonable building quality, but does pose constraints in terms of any potential intensification or redevelopment. Poor HGV access due to narrow streets as well as neighbour issues means the site is considered better suited for alternative uses. Parts of the site also suffer from long term vacancies which points to a lack of market interest.</p>		
Adjacent land use and conflicts	<p>All of site is either in or adjacent to Town Quay Conservation area, and adjacent to a site of special scientific interest.</p>		
Known constraints and infrastructure requirements	<p>The site is constrained by conservation area constraints and poor HGV access.</p>		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.			No
2.2: Is the site identified or likely to be required for a specific user or specialist use?			Yes
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?			No
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?			N/A
Strategic Planning and Access	<p>Several change of use applications.</p>		
Recommendation	<p>Site Score D – Below Average. The site has poor HGV access as well as neighbour issues. It is also within a conservation area, which is likely to inhibit further development, therefore alternative uses and redevelopment is likely in the medium to long term.</p>		

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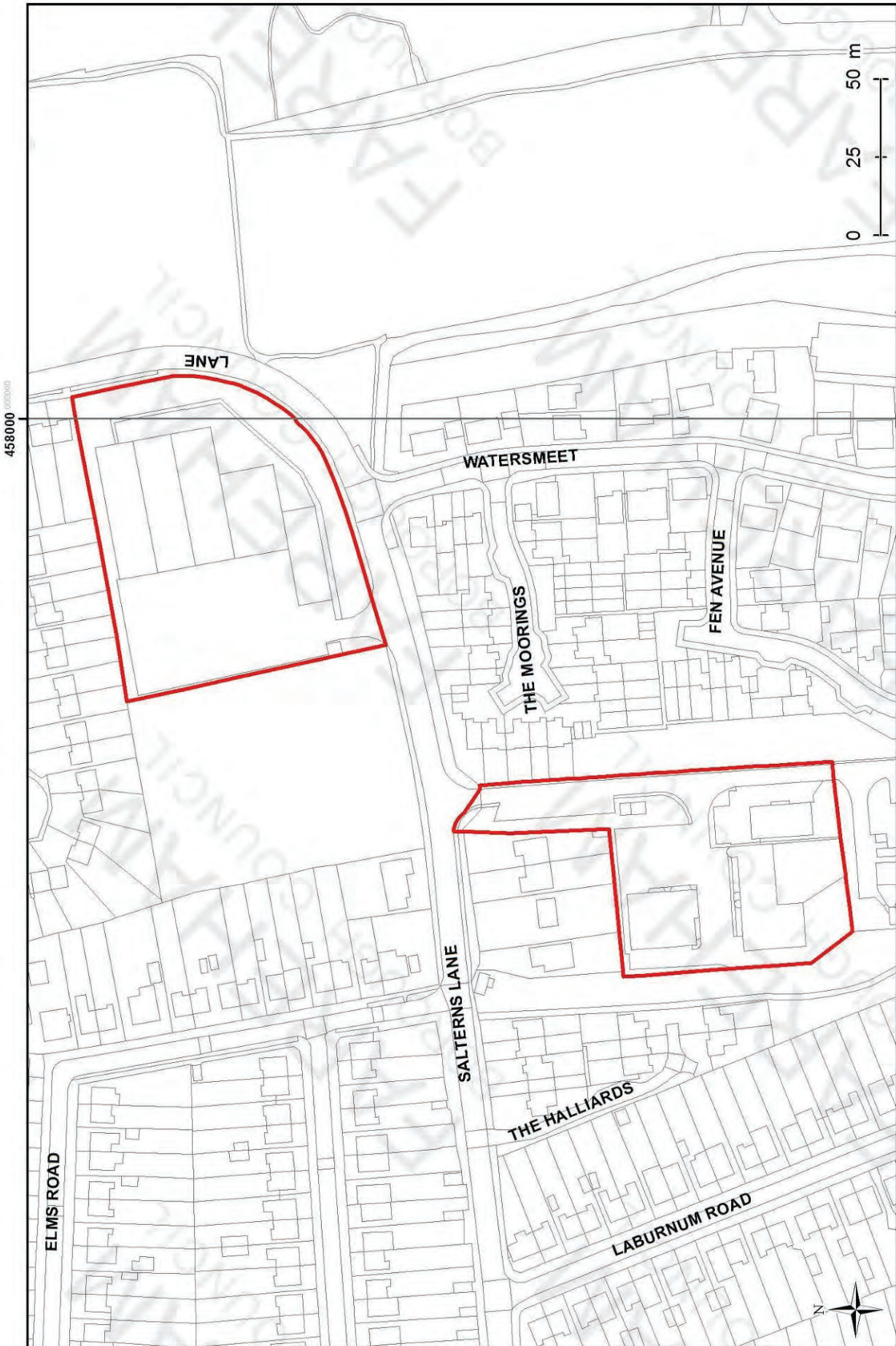
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Site ID:91 - Lower Quay & Quayside

FBC EMPLOYMENT LAND STUDY – 2018

Site Address Salterns & Delta Business Park, Salterns Lane			
Site Ref	92		
Ward	Fareham East	Size	1.28 Ha
Market Segment	B1, B2 and D1		
Description of Site and Location:	<p>4,675 sq m of buildings</p> <p>Salterns industrial area is situated to the north of Salterns Lane and Delta Business Park is located to the south.</p> <p>Salterns is a purpose built industrial area consisting of a cul-de-sac of B2 sheds with grey clad facades and large access doors serviced by a single communal car park. Delta Business Park is a more diverse part of the site, with a mix of uses in multi-storey buildings of varying ages and styles.</p>		
Market Attractiveness Criteria			
1.1: Has the site been formally identified for employment for at least 10 years?			Yes
1.2: Has there been any recent development activity, within the last 5 years?			No
1.3: Is the site being actively marketed as an employment site?			Yes
1.4: Is the site owned by a developer or another agency known to undertake employment development?			Yes
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?			No
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?			Yes
1.7: Is the site immediately available?			Yes
Market Appraisal	<p>The sites main access is to the congested Gosport Road, and its position away from local amenities and any local centre adversely influences the suitability scores. The current building quality is reasonable but any proposed changes would need to consider the neighbouring residential areas. The mixed nature of Delta Business Park would pose redevelopment prospects in the medium to long term.</p>		
Adjacent land use and conflicts	<p>Salterns and Delta Business Park is an employment area adjacent to local gap, coastal zone and countryside to east and allotments to west. Delta Business Park is adjacent to a previous housing allocation.</p>		
Known constraints and infrastructure requirements	<p>The site is located some distance from local amenities and the site is located in a predominantly residential area.</p>		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.			No
2.2: Is the site identified or likely to be required for a specific user or specialist use?			Yes
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?			No
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?			N/A
Strategic Planning and Access	<p>No relevant planning history just a few change of use applications.</p>		
Recommendation	<p>Site Score D – Below Average. The sites are located in residential areas and access to them suffers from congestion. The buildings on Salterns are of reasonable condition and serve a purpose within the local market. Delta Park however has a greater mix of building styles and uses, and appears underutilised, so it is likely to be more suitable for alternative uses in the medium to long term.</p>		



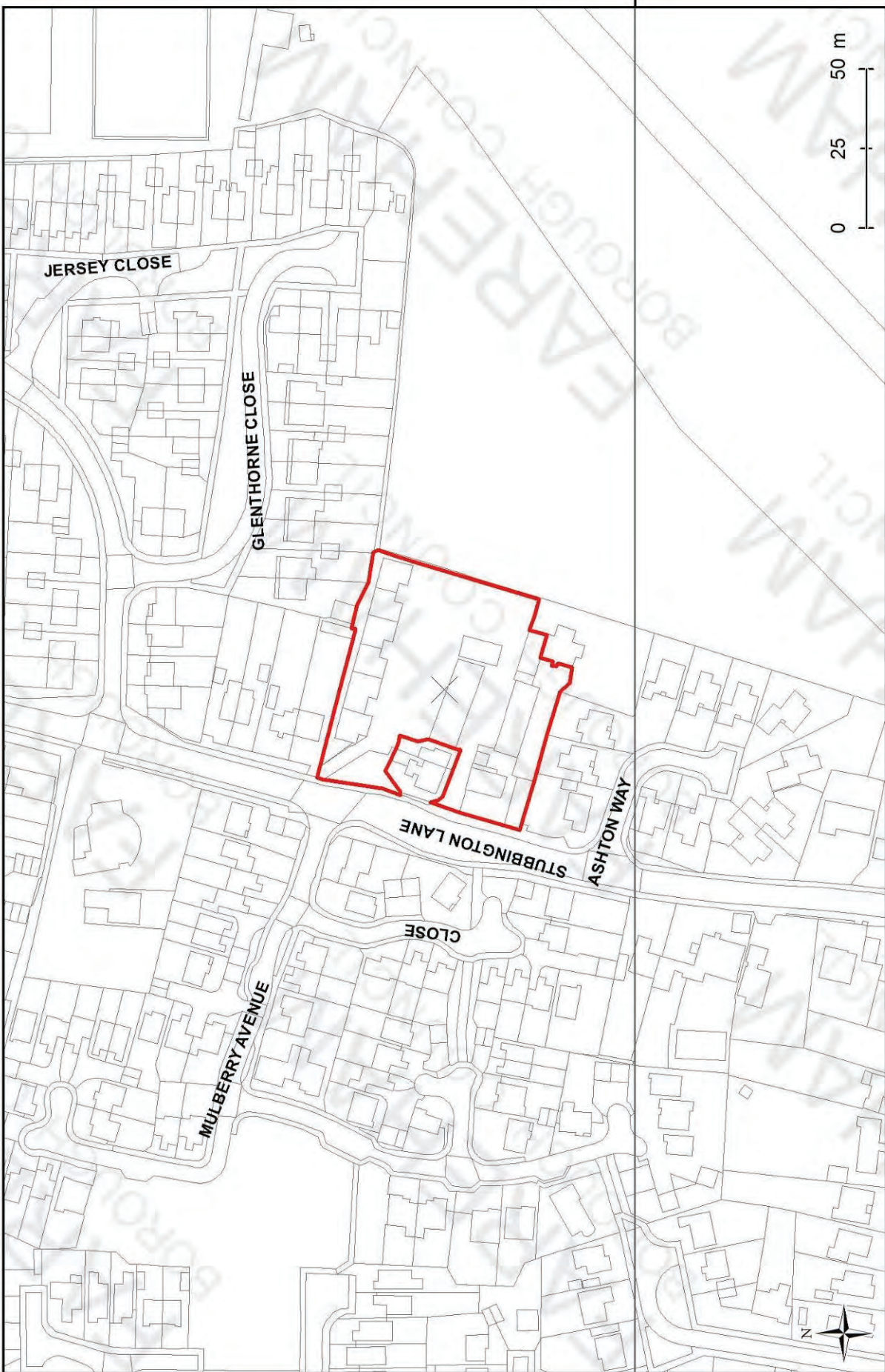
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Site ID:92 - Salterns & Delta Business Park

FBC EMPLOYMENT LAND STUDY – 2018

Site Address Hammond Industrial Park, Stubbington Lane			
Site Ref	93		
Ward	Hill Head	Size	0.43 Ha
Market Segment	B2 and B8		
Description of Site and Location:	<p>1,168 sq m of buildings The estate is situated on the east side of Stubbington Lane with a mix of uses with semi-retail and sui generis present. Category B Low intensity industrial area typified by small single storey units in three rows. Common parking areas are poorly kept and buildings are of generally low quality.</p>		
Market Attractiveness Criteria			
1.1: Has the site been formally identified for employment for at least 10 years?			Yes
1.2: Has there been any recent development activity, within the last 5 years?			No
1.3: Is the site being actively marketed as an employment site?			Yes
1.4: Is the site owned by a developer or another agency known to undertake employment development?			No
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?			Yes Hammond & Son and Private owner
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?			Yes
1.7: Is the site immediately available?			Yes
Market Appraisal	<p>Site is located away from major road network and any local amenities or centres. Building quality is relatively poor, as is the site layout and environmental quality. The site does provide "start-up" accommodation and is currently the only employment area in the Stubbington/Hill Head area, but it does not contribute significantly with job numbers and is unlikely to be an attractive proposition for intensification.</p>		
Adjacent land use and conflicts	<p>The site is an employment area located within the eastern most boundary of the Stubbington urban area. Adjacent to Strategic Gap and Daedalus Airfield.</p>		
Known constraints and infrastructure requirements	<p>The buildings are of quality and the site is situated in a predominantly residential area.</p>		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.			No
2.2: Is the site identified or likely to be required for a specific user or specialist use?			Yes
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?			No
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?			N/A
Strategic Planning and Access	<p>2005 – Permission given for erection of new MOT unit.</p>		
Recommendation	<p>Site Score D – Below Average. The site currently serves an important function for the Stubbington area particularly for start-up businesses seeking low cost options. Its location and building quality however presents redevelopment prospects in the medium to long term.</p>		



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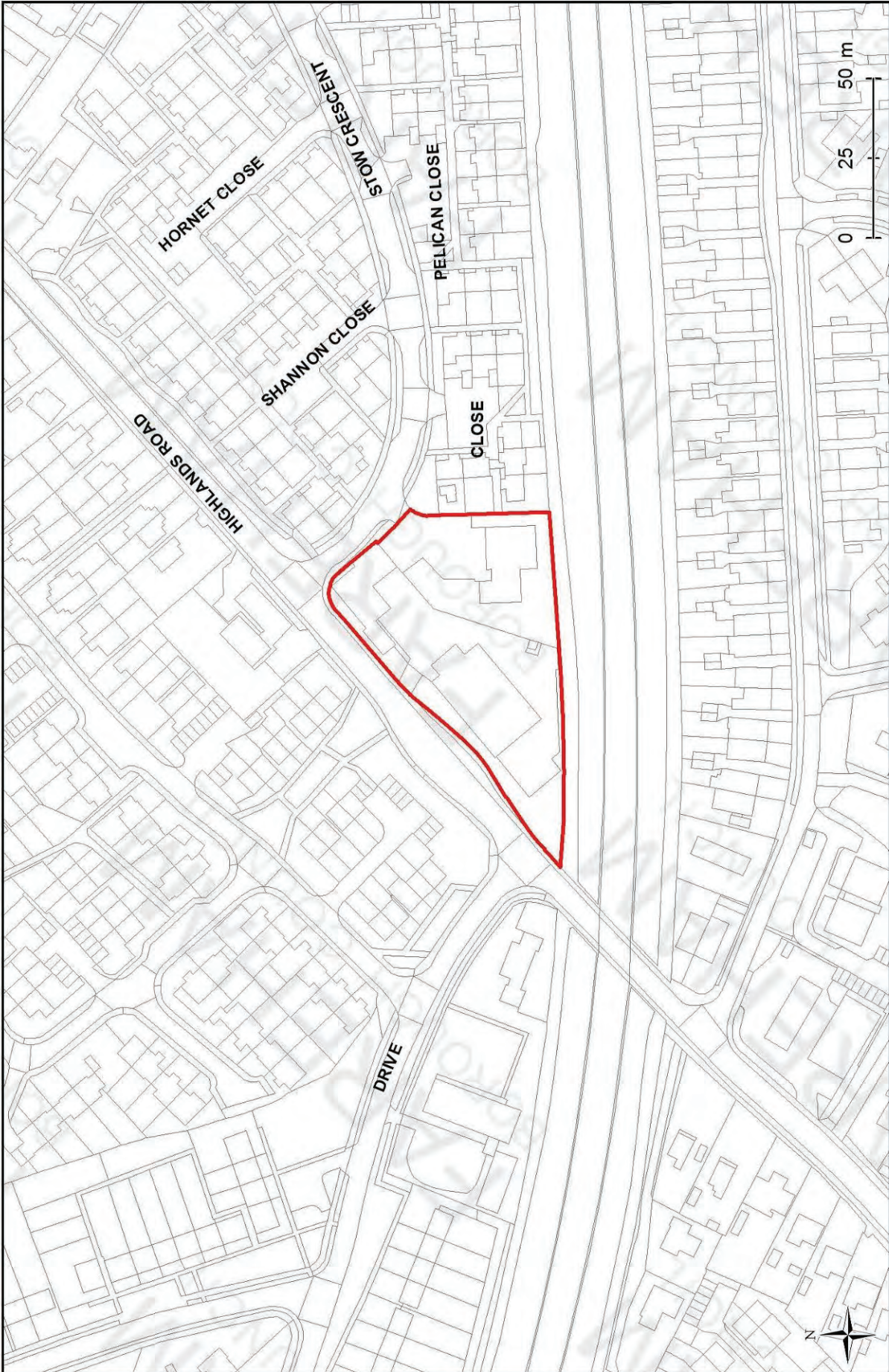
FAREHAM
BOROUGH COUNCIL

Site ID:93 - Hammond Industrial Park, Stubbington Lane

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FBC EMPLOYMENT LAND STUDY – 2018

Site Address Corner of Stow Estate and Highlands Road			
Site Ref	94		
Ward	Fareham North West	Size	0.32 Ha
Market Segment	B1c		
Description of Site and Location:	<p>1,415 sq m of buildings The site comprises two units on east side of Highlands Road immediately north of the railway line. The units are medium sized, single storey units with communal parking between served by direct access to Highlands Road. Both units are brick built with clad roofing.</p>		
Market Attractiveness Criteria			
1.1: Has the site been formally identified for employment for at least 10 years?			Yes
1.2: Has there been any recent development activity, within the last 5 years?			No
1.3: Is the site being actively marketed as an employment site?			Yes
1.4: Is the site owned by a developer or another agency known to undertake employment development?			No
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?			Yes – Jacob Carr Homes (Fareham) and private owner
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?			Yes
1.7: Is the site immediately available?			Yes
Market Appraisal	<p>The two units are in generally good condition, served by an adequate layout and reasonable access to the road network. The format of the existing buildings and the position away from any centre means the site is better suited to its current use than B1 offices. Potential intensification is possible given the low rise buildings, however more likely would be the combination of the buildings into a single occupier making more efficient use of existing space.</p>		
Adjacent land use and conflicts	<p>Employment area located in an urban area surrounded by residential.</p>		
Known constraints and infrastructure requirements	<p>Poor building quality and distanced from local amenities.</p>		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.			No
2.2: Is the site identified or likely to be required for a specific user or specialist use?			No
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?			No
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?			N/A
Strategic Planning and Access	<p>No relevant planning history.</p>		
Recommendation	<p>Site Score D – Below Average. This employment site is small and is located within a predominantly residential area. The buildings are dated and poorly configured on site providing an opportunity for development for an alternative use or intensification of existing uses.</p>		



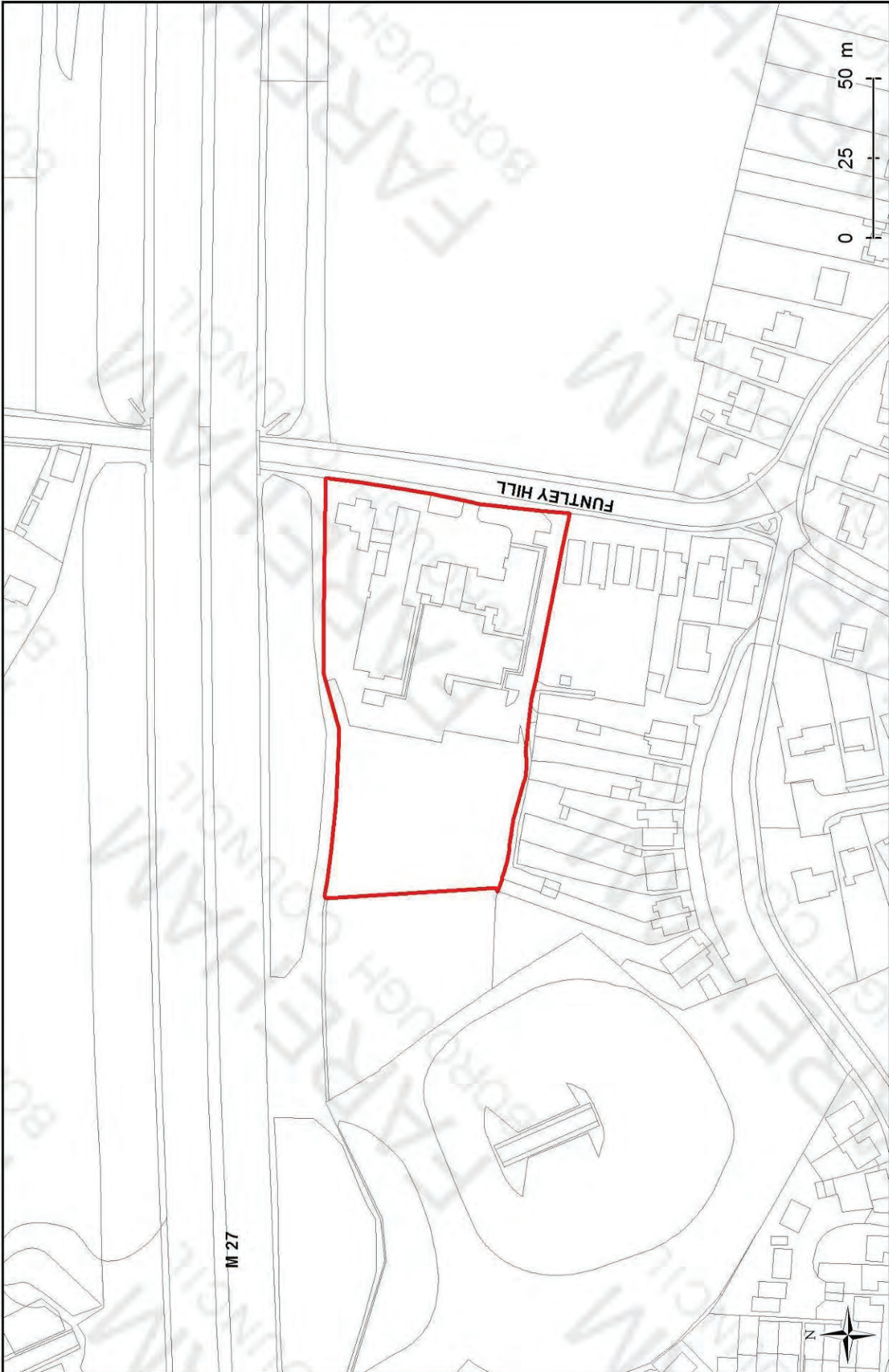
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Site ID:94 - Highland Rd junction with Stow Crescent

FBC EMPLOYMENT LAND STUDY – 2018

Site Address Funtley Court, Funtley Hill			
Site Ref	95		
Ward	Fareham North	Size	0.82 Ha
Market Segment	B1		
Description of Site and Location:	<p>2,334 sq m of buildings The site is a former school site on Funtley Hill that has been converted into multiple B1 office units. The buildings have a range of storey heights but all good quality brick buildings. Car parking to front and rear, which is accessed via two archways.</p>		
Market Attractiveness Criteria			
1.1: Has the site been formally identified for employment for at least 10 years?			Yes
1.2: Has there been any recent development activity, within the last 5 years?			No
1.3: Is the site being actively marketed as an employment site?			Yes
1.4: Is the site owned by a developer or another agency known to undertake employment development?			Yes
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?			Yes – Drysdale Investments Ltd & Lindberg Investments Ltd
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?			Yes
1.7: Is the site immediately available?			Yes
Market Appraisal	<p>The site comprises a good quality conversion providing flexible space for B1 offices. Whilst there is poor public transport links and local amenities the environmental is of good quality and offers a simple site layout. There is potential for expansion to rear which has had previous permission.</p>		
Adjacent land use and conflicts	<p>The site is small and is predominated by residential dwellings within northern boundary of Fareham. There is countryside to north, east and west.</p>		
Known constraints and infrastructure requirements	<p>The site suffers from poor transport links and a lack of local amenities.</p>		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.			No
2.2: Is the site identified or likely to be required for a specific user or specialist use?			No
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?			No
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?			N/A
Strategic Planning and Access	<p>A previous planning submission was made on the space to the west, for an extension of the existing provision of office space. 2009 - Land to Rear of - PO16 7UY: Proposal: Erection Of Building For B1 Business Use Status: Detail Approval</p>		
Recommendation	<p>Site Score C – Average. The site comprises a successfully converted office scheme, which whilst lacks amenity and local transport, does serve the local office market and is well occupied.</p>		



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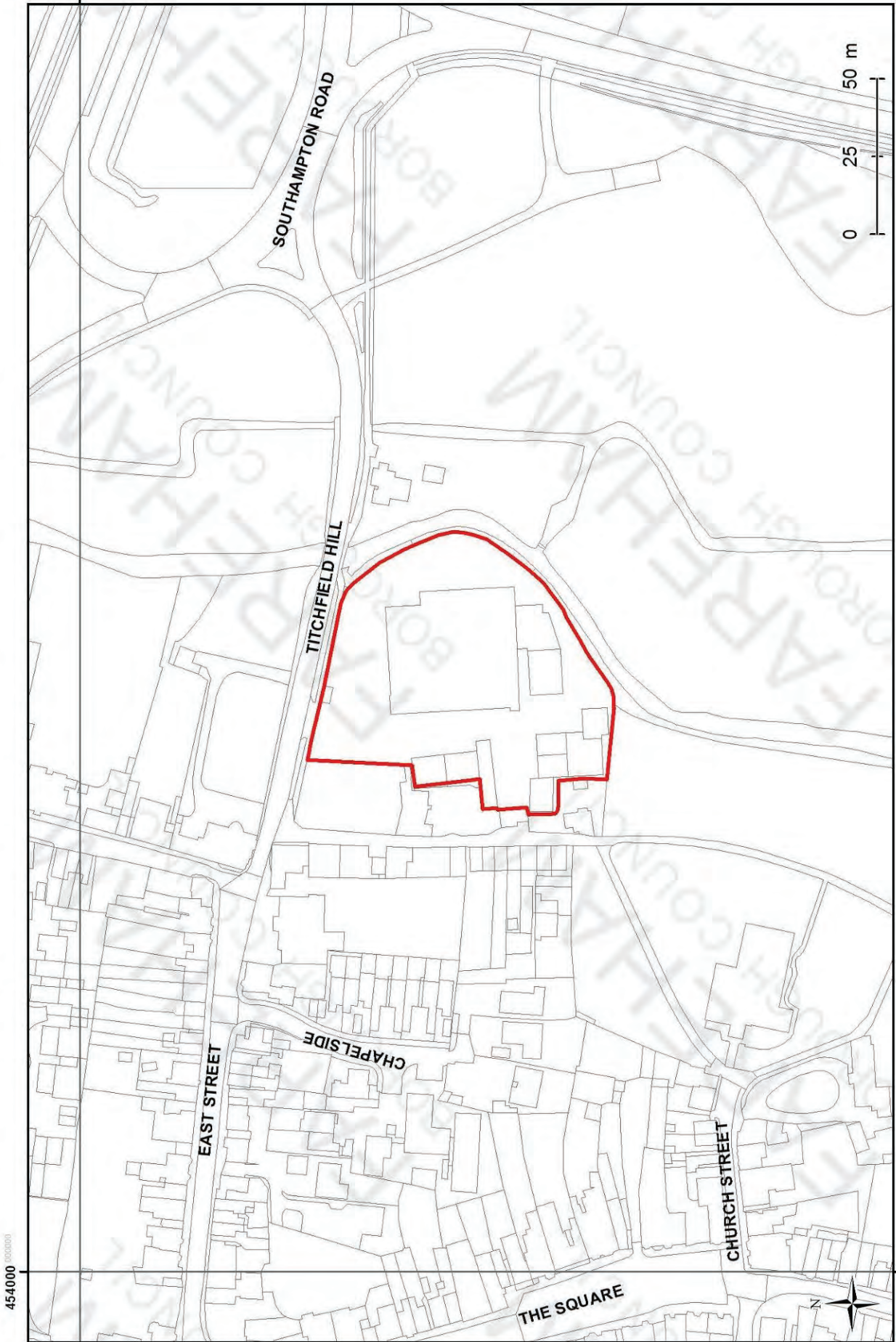
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Site ID:95 - Funtley Court

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FBC EMPLOYMENT LAND STUDY – 2018

Site Address The Tanneries, Titchfield Hill			
Site Ref	96		
Ward	Titchfield	Size	0.61 Ha
Market Segment	B1, B2 and B8		
Description of Site and Location:	<p>6,558 sq m of buildings</p> <p>The Tanneries is an industrial estate south of East Street in the east part of Titchfield and comprises a mix of uses. The estate offers a mix of building types, heights, ages, and materials e.g. two/three storey office buildings alongside single storey B2, B8 sheds. There is a single access point to East Street, with service road circling main building in the centre of the site.</p>		
Market Attractiveness Criteria			
1.1: Has the site been formally identified for employment for at least 10 years?			Yes
1.2: Has there been any recent development activity, within the last 5 years?			No
1.3: Is the site being actively marketed as an employment site?			Yes
1.4: Is the site owned by a developer or another agency known to undertake employment development?			Yes
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?			No
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?			Yes
1.7: Is the site immediately available?			Yes
Market Appraisal	<p>The site offers space for a range of uses. The site links up to the A27 via East Street and is reasonably close to Titchfield Local Centre. The main challenges for any potential redevelopment would be the conservation area location, however well designed new units may be better for the conservation than some of the existing units.</p>		
Adjacent land use and conflicts	<p>The estate is an employment area set fully within Titchfield Conservation Area. It is set within the eastern most boundary of Titchfield urban area adjacent to site of importance for nature conservation, strategic gap, countryside and area of special landscape character.</p>		
Known constraints and infrastructure requirements	<p>The site will be subject to restrictions as it is set within the conservation area.</p>		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.			No
2.2: Is the site identified or likely to be required for a specific user or specialist use?			No
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?			No
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?			N/A
Strategic Planning and Access	<p>No relevant planning history.</p>		
Recommendation	<p>Site Score D – Below Average. The site offers and range of buildings or a mix of uses which serves the local market and is well occupied. Further development or redevelopment will be restricted as it sites within a conservation area.</p>		



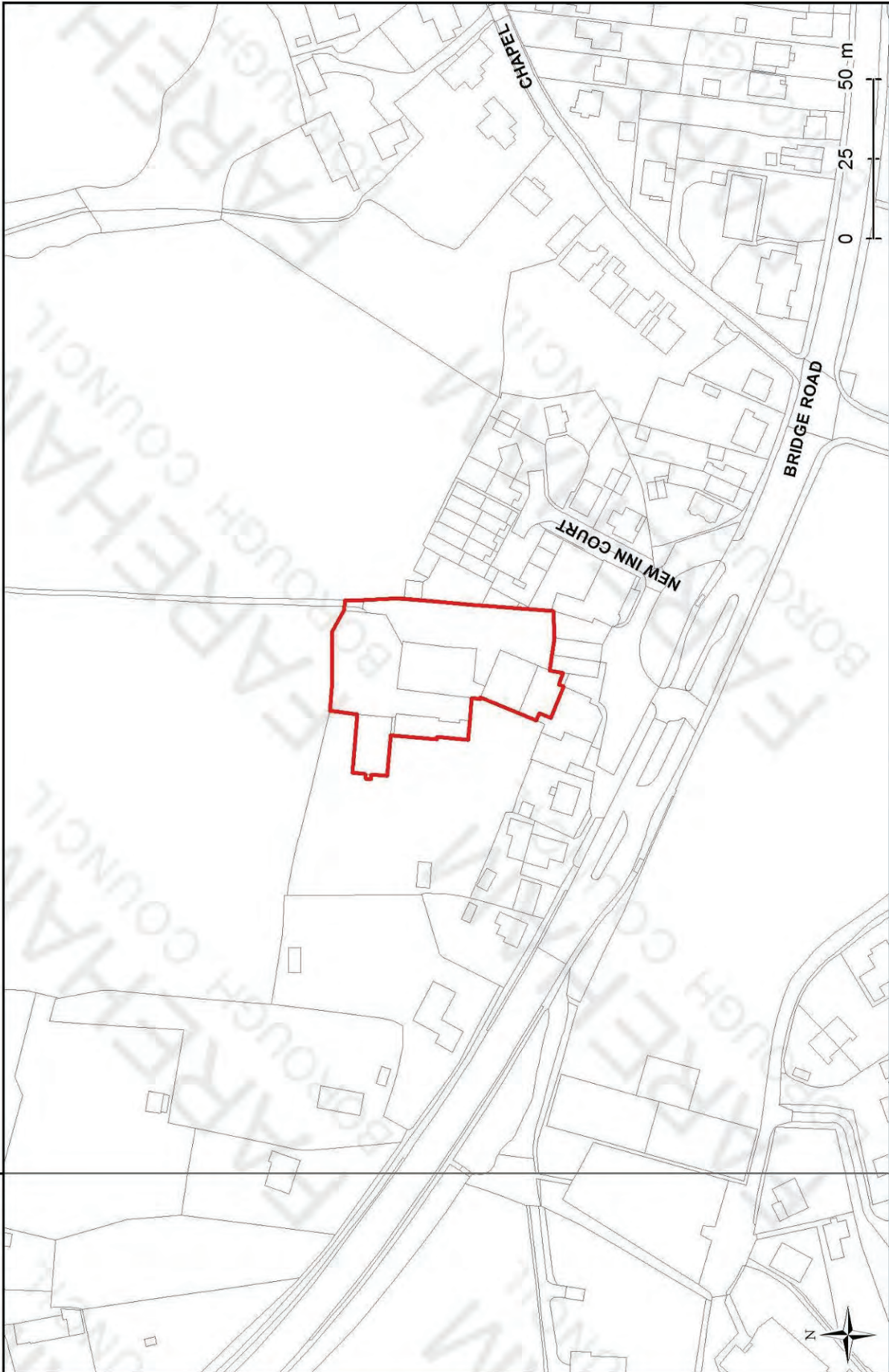
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Site ID:96 - The Tanneries

FBC EMPLOYMENT LAND STUDY – 2018

Site Address R.O. Bridge Road Parade			
Site Ref	97		
Ward	Sarisbury	Size	0.27 Ha
Market Segment	B1, B2 and B8		
Description of Site and Location:	<p>988 sq m of buildings The site comprises a small industrial area to the rear of the parade to the north of Bridge Road. The site offers low intensity outbuildings used for B2 purposes. The site is accessed between two shop frontages along Bridge Road. The buildings are mostly single storey with clad corrugated roofing.</p>		
Market Attractiveness Criteria			
1.1: Has the site been formally identified for employment for at least 10 years?			Yes
1.2: Has there been any recent development activity, within the last 5 years?			No
1.3: Is the site being actively marketed as an employment site?			Yes
1.4: Is the site owned by a developer or another agency known to undertake employment development?			Yes
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?			Yes – Sarisbury Building Limited and private owner
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?			Yes
1.7: Is the site immediately available?			Yes
Market Appraisal	<p>The site offers basis buildings of low quality and is poorly configured on site. Access for HGV's is difficult via narrow access point. The site suffers from long term vacancies suggesting it may be better suited for redevelopment for an alternative use.</p>		
Adjacent land use and conflicts	<p>A small employment area set within Sarisbury Green Conservation Area. To the north of defined parade and to the south of urban boundary with countryside and local gap to north</p>		
Known constraints and infrastructure requirements	<p>The site has poor access.</p>		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.			No
2.2: Is the site identified or likely to be required for a specific user or specialist use?			Yes
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?			No
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?			N/A
Strategic Planning and Access	<p>No relevant planning history.</p>		
Recommendation	<p>Site Score E – Low. The site is challenged in its access, quality of building and poor site layout and suffers from high vacancy rates. Alternative uses and redevelopment options should be explored.</p>		



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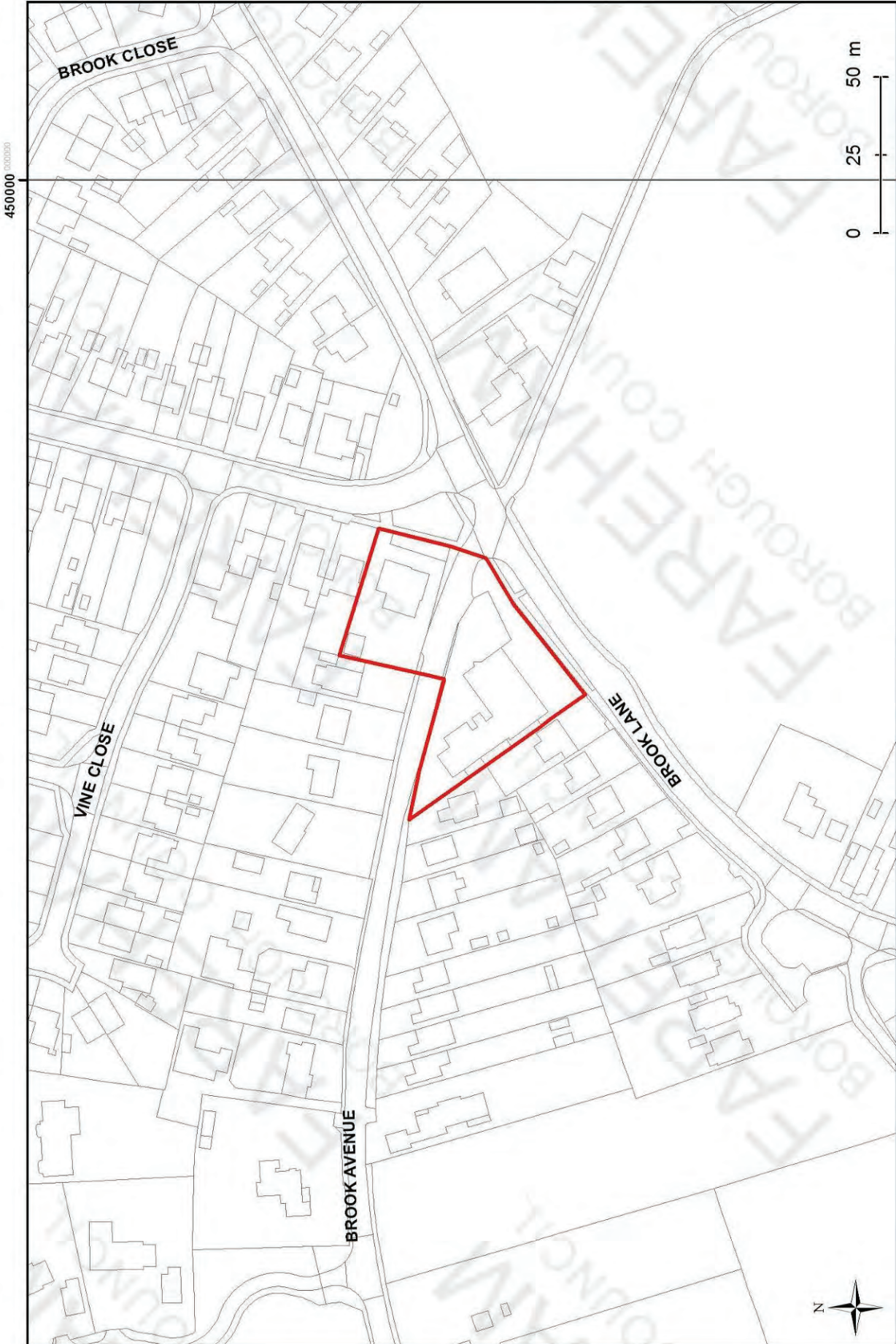
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Site ID:97 - R.O. Bridge Rd Parade

FBC EMPLOYMENT LAND STUDY – 2018

Site Address Brook Avenue/ Brook Lane (junction of)			
Site Ref	98		
Ward	Warsash, Park Gate	Size	0.34 Ha
Market Segment	B1 and A1		
Description of Site and Location:	<p>1,632 sq m The site comprises two medium/large buildings either side of Brook Avenue where it meets Brook Lane. The site is formed of two medium/large two storey brick built office blocks, part of one is used for retail purposes. The site has a low density with soft landscaping fronting Brook Lane.</p>		
Market Attractiveness Criteria			
1.1: Has the site been formally identified for employment for at least 10 years?			Yes
1.2: Has there been any recent development activity, within the last 5 years?			No
1.3: Is the site being actively marketed as an employment site?			Yes
1.4: Is the site owned by a developer or another agency known to undertake employment development?			No
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?			Yes – Liberty Leasing Limited and private owner
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?			Yes
1.7: Is the site immediately available?			Yes
Market Appraisal	<p>Site benefits from reasonable B1 building quality, environmental quality and road access although it is slightly removed from the strategic road network. Residential and countryside surrounding the site makes expansion unlikely and would restrict intensification. The fact that the site is isolated and consists of only two buildings it may be vulnerable to vacancy rates giving an impression of emptiness. However the site is one of very few employment sites in this part of the Borough and should be retained unless long term vacancies become an issue.</p>		
Adjacent land use and conflicts	<p>The site is within an urban boundary and is adjacent to the countryside and local gap. The site is surrounded by residential to the north and west.</p>		
Known constraints and infrastructure requirements	<p>The sites location restricts intensification of development.</p>		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.			No
2.2: Is the site identified or likely to be required for a specific user or specialist use?			Yes
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?			No
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?			N/A
Strategic Planning and Access	<p>No relevant planning history.</p>		
Recommendation	<p>Site Score D – Below Average. There are limited employment sites within the immediate vicinity and as the units are of good standard and access is reasonable, whilst there is occupational demand, this employment site should be retained.</p>		



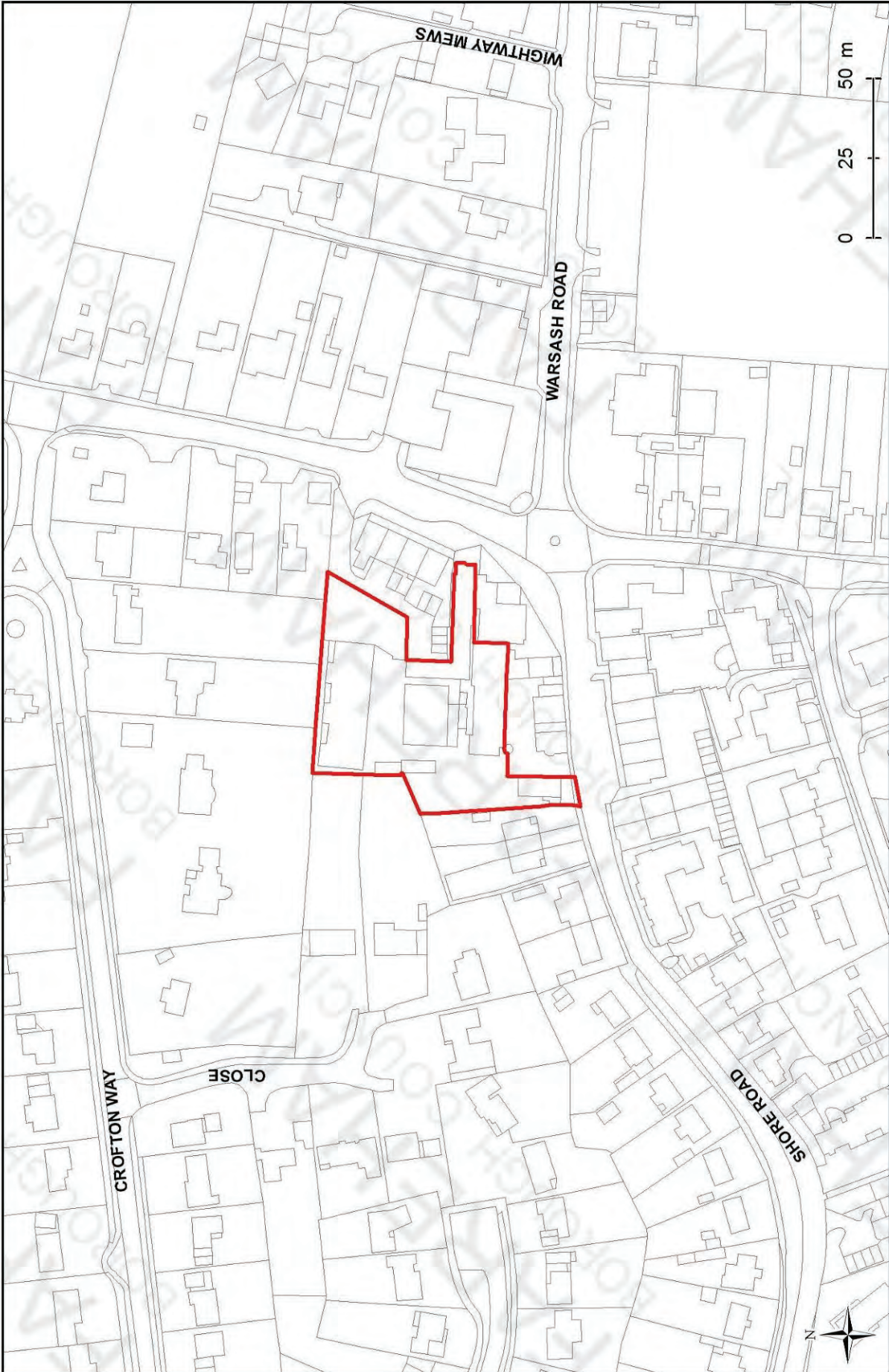
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Site ID:98 - Brook Avenue/Brook Lane

FBC EMPLOYMENT LAND STUDY – 2018

Site Address Warsash Village Centre, off of Shore Road			
Site Ref	99		
Ward	Warsash	Size	0.35 Ha
Market Segment	B1 and B2 units		
Description of Site and Location:	3,270 sq m The site comprises number of buildings in B1-B8 use located behind retail units along Brook Lane and Shore Road. It offers a mix of single storey and two storey buildings adjacent to and in places attached to retail frontage buildings.		
Market Attractiveness Criteria			
1.1: Has the site been formally identified for employment for at least 10 years?			Yes
1.2: Has there been any recent development activity, within the last 5 years?			No
1.3: Is the site being actively marketed as an employment site?			Yes
1.4: Is the site owned by a developer or another agency known to undertake employment development?			No
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?			Yes – Expo (Drills) Ltd, Sea Sure Ltd and (multiple?) private owners
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?			Yes
1.7: Is the site immediately available?			Yes
Market Appraisal	The site is intensively used with a number of operators functioning in a tight space, as such the environmental quality and site layout is relatively poor. Site does benefit from proximity to local amenities from Warsash Local Centre. There would appear to be very little chance for expansion or intensification.		
Adjacent land use and conflicts	An employment area adjacent to Warsash Local Centre, Coastal Zone and area of special residential character.		
Known constraints and infrastructure requirements	The site is configured poorly with limited parking and is tightly packed limiting any scope for further intensification.		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.			No
2.2: Is the site identified or likely to be required for a specific user or specialist use?			Yes
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?			No
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?			N/A
Strategic Planning and Access	Several change of use applications.		
Recommendation	Site Score D – Below Average. The site is well occupied and whilst it suffers from limited parking and is poorly configured, it does provide a mix of employment space within Warsash Village centre.		



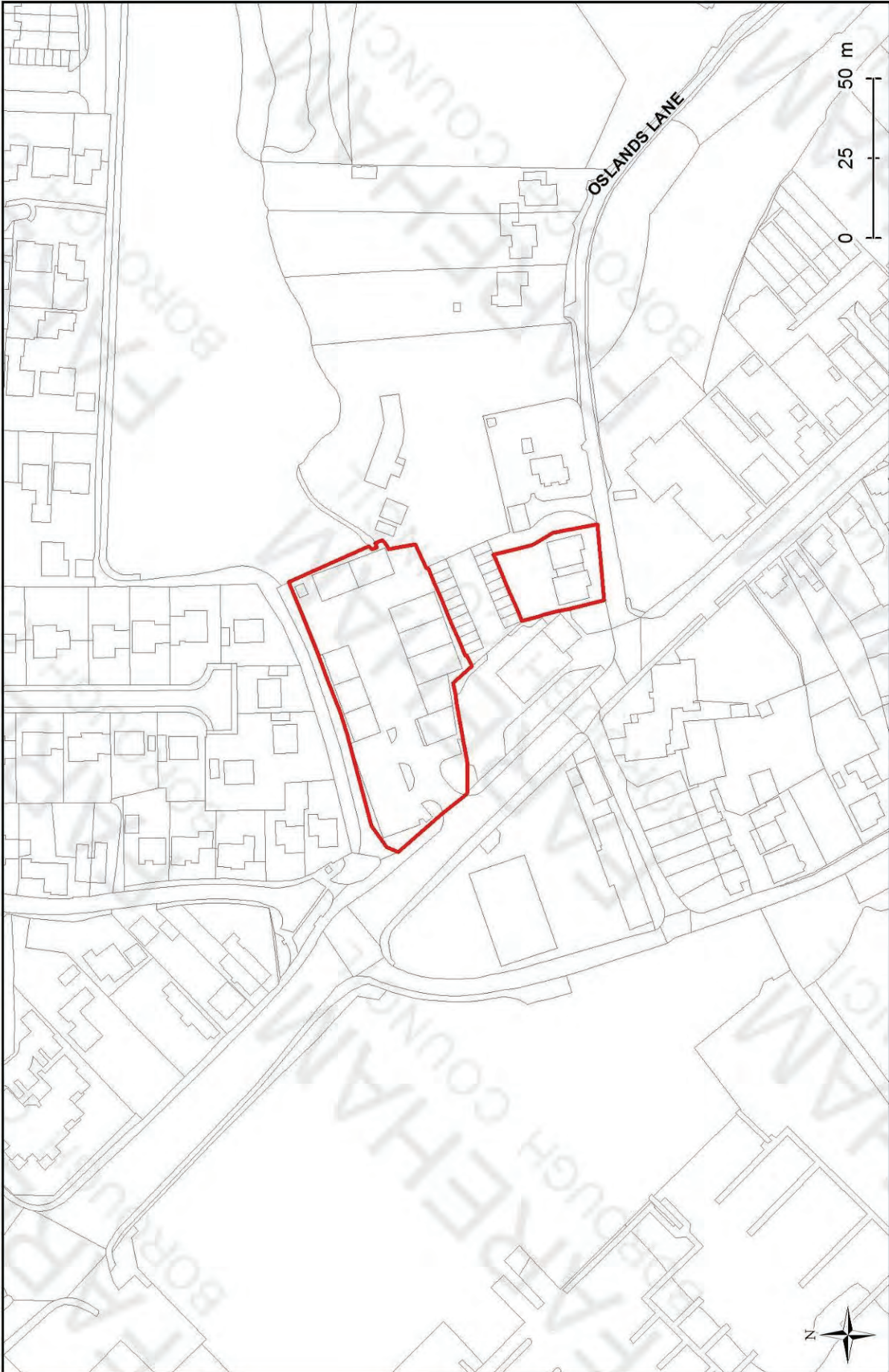
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Site ID:99 - Warsash Village Centre

FBC EMPLOYMENT LAND STUDY – 2018

Site Address Swanwick Business Centre & Oslands Court, off Bridge Road			
Site Ref	100		
Ward	Sarisbury	Size	0.41 Ha
Market Segment	B1 and B2		
Description of Site and Location:	<p>2,476 sq m Swanwick Business Centre and Oslands Court office block are located along Oslands Lane and includes marine orientated Swanwick Business Centre and adjacent B1 Oslands Court. Swanwick Business Centre is a modern B2 estate, brick built with direct access to Bridge Road. All units are of a similar size and shape and are set out in a cul-de-sac layout. Oslands Court consists of 2, two storey attached office buildings, with limited parking. Access to Bridge Road is via Oslands Lane.</p>		
Market Attractiveness Criteria			
1.1: Has the site been formally identified for employment for at least 10 years?		Yes	
1.2: Has there been any recent development activity, within the last 5 years?		No	
1.3: Is the site being actively marketed as an employment site?		Yes	
1.4: Is the site owned by a developer or another agency known to undertake employment development?		Yes	
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?		Yes – SBP – Uptel Ltd, Southern Water Services and private owner. OC – Ibcon Construction Ltd	
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?		Yes	
1.7: Is the site immediately available?		Yes	
Market Appraisal	<p>The site scores well due to the quality of the buildings, site layout and the high environmental quality. However, the site is away from substantial local amenities and is poorly served by public transport. Expansion may be possible if adjacent car showroom were to become available. But the site is bounded by residential properties as well, so intensification would be difficult.</p>		
Adjacent land use and conflicts	<p>Larger site is opposite Swanwick Shore conservation area and coastal zone to the west, with countryside, local gap and site of importance for nature conservation to east.</p>		
Known constraints and infrastructure requirements	<p>Distance to local amenities and public transport. Surrounded by residential.</p>		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.		No	
2.2: Is the site identified or likely to be required for a specific user or specialist use?		No	
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?		No	
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?		N/A	
Strategic Planning and Access	No relevant planning history.		
Recommendation	<p>Site Score C – Average. The site is a popular estate with low vacancy rates. The units are of good quality and serve the small business unit market.</p>		



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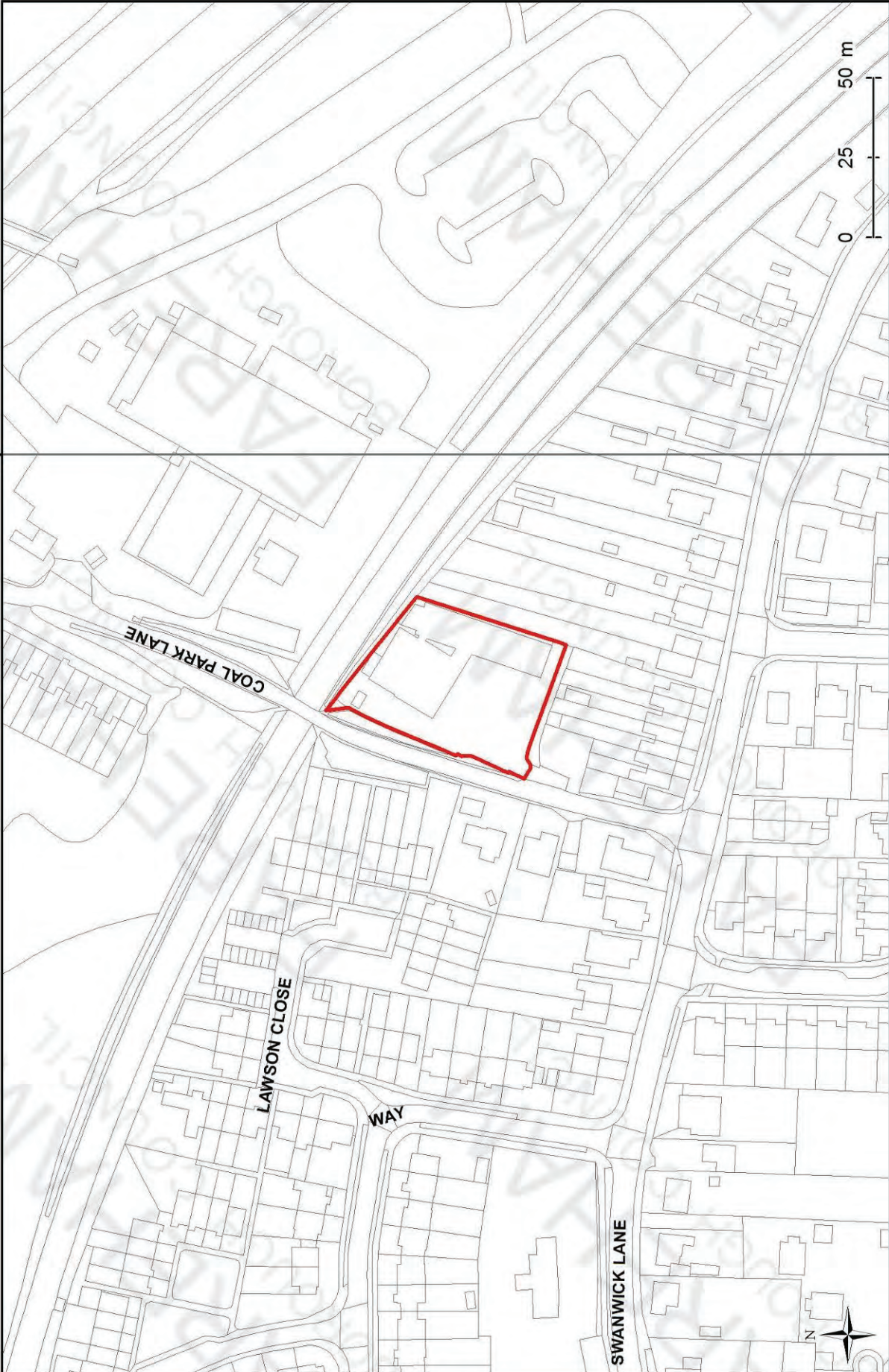
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Site ID:100 - Swanwick Business Park & Oslands Court

FBC EMPLOYMENT LAND STUDY – 2018

Site Address Coal Park Lane			
Site Ref	101		
Ward	Sarisbury	Size	0.24 Ha
Market Segment	B2 and B8		
Description of Site and Location:	<p>950 sq m The site comprises three connected buildings to the east of Coal Park Lane south of the railway. The northern and eastern buildings are single storey sheds, whilst the central building is a red brick, two storey office block. The site is served by a large car park and small road linking it to Coal Park Lane and Swanwick Lane.</p>		
Market Attractiveness Criteria			
1.1: Has the site been formally identified for employment for at least 10 years?			Yes
1.2: Has there been any recent development activity, within the last 5 years?			No
1.3: Is the site being actively marketed as an employment site?			Yes
1.4: Is the site owned by a developer or another agency known to undertake employment development?			No
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?			No
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?			Yes
1.7: Is the site immediately available?			Yes
Market Appraisal	<p>The site has poor access and limited prominence count against the score for the site. However, the site does benefit from a simple layout and reasonable building quality. The poor access and neighbour issues would restrict potential expansion and intensification. Not considered worthy of protection due to poor suitability and poor building quality.</p>		
Adjacent land use and conflicts	<p>The site is an employment area within urban area. To the north is countryside.</p>		
Known constraints and infrastructure requirements	<p>The site has poor access and limited prominence.</p>		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.			No
2.2: Is the site identified or likely to be required for a specific user or specialist use?			No
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?			No
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?			N/A
Strategic Planning and Access	<p>No relevant planning history.</p>		
Recommendation	<p>Site Score E – Low. The site lacks prominence and is of low build quality with poor access. It is also restricted in terms of expansion and intensification. Given its position in a predominantly residential location, alternative uses for the site should be considered.</p>		

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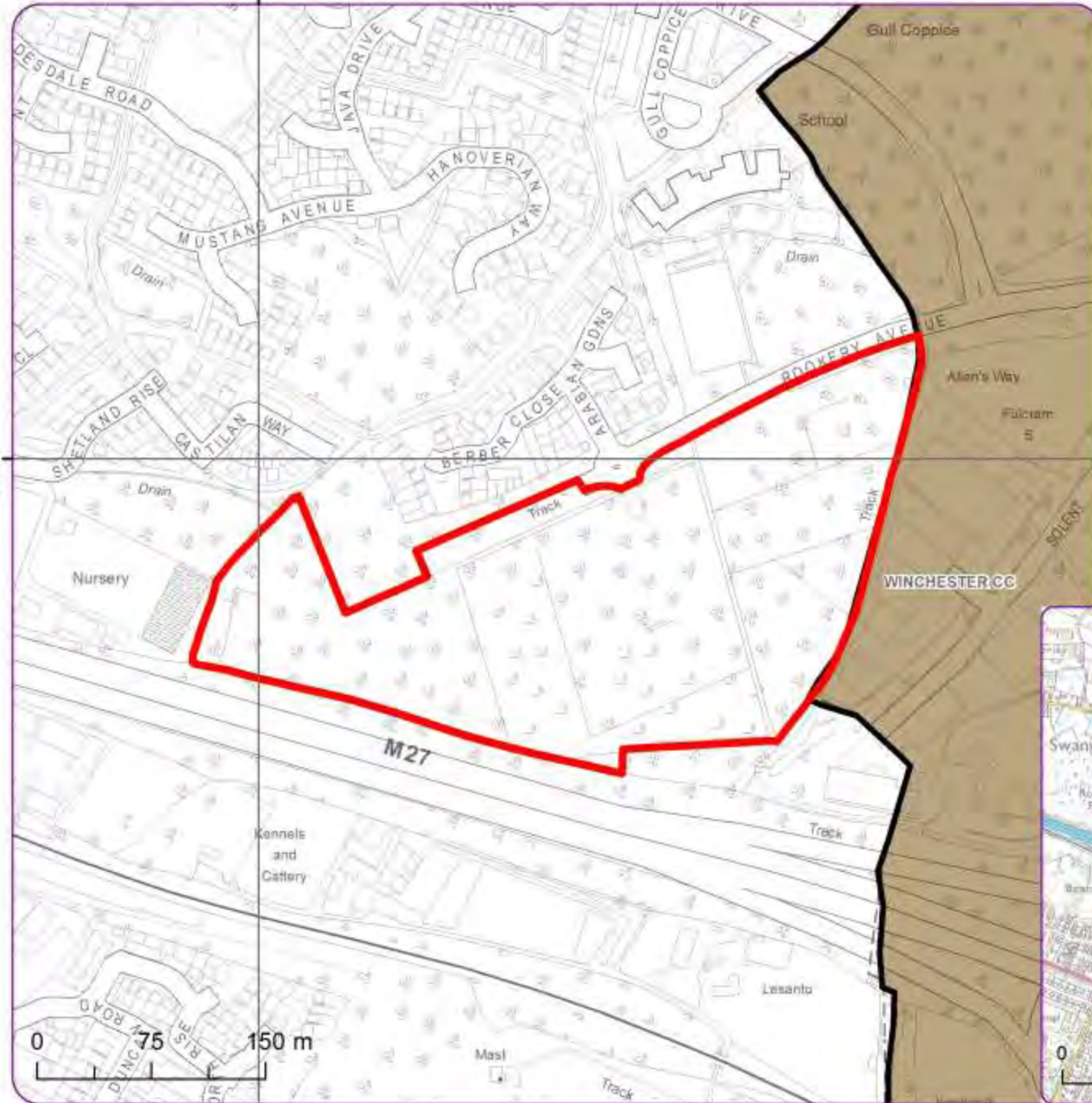
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Site ID:101 - Coal Park Lane

FBC EMPLOYMENT LAND STUDY – 2018

Site Address Solent 2, Whiteley (Rookery Avenue)			
Site Ref	124		
Ward	Sarisbury	Size	9.84 Ha
Market Segment	B1, B2 or B8		
Description of Site and Location:	<p>Indicative floorspace 23,500 sq m (takes account of extensive tree coverage & SINC's)</p> <p>The site is an ancient & semi-natural woodland and scrub and is readily accessible from Rookery Avenue. The site is allocated and has extant planning permission. A new application understood to be imminent.</p>		
Market Attractiveness Criteria			
1.1: Has the site been formally identified for employment for at least 10 years?			Yes
1.2: Has there been any recent development activity, within the last 5 years?			No
1.3: Is the site being actively marketed as an employment site?			Yes
1.4: Is the site owned by a developer or another agency known to undertake employment development?			Yes
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?			No
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?			No
1.7: Is the site immediately available?			Yes
Market Appraisal	<p>The site has an existing local plan allocation with good links to the M27. It is a commercially attractive site for B1 and B2 uses, although B2 is preferred. Proposals for the site would need to safeguard land to allow for the future completion of Rookery Avenue through to Botley Road and a financial contribution may be sought towards its completion. Safe crossing and improved pedestrian facilities on Rookery Avenue would need to be provided.</p>		
Adjacent land use and conflicts	<p>Rookery Avenue and residential development to the north; Solent Way business park to the east; M27 to the south; Gull Field Nursery and woodland to the west.</p>		
Known constraints and infrastructure requirements	<p>The site has an extensive coverage of TPO's. The site contains ancient woodland, priority meadow grassland, priority woodland habitat and SINC meadow. It also supports notable species. Any development on the site would need to be restricted to areas of site not covered by SINC designation.</p>		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.			No
2.2: Is the site identified or likely to be required for a specific user or specialist use?			No
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?			Yes
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?			N/A
Strategic Planning and Access	Residential and B1 development.		
Recommendation	<p>Site Score B – Above Average. The site is a commercially attractive site for the proposed B1 or B2 uses although the preference would be for B2. The location with its access and congestion constraints would make this site less suitable for B8 uses.</p>		

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FAREHAM
BOROUGH COUNCIL

SITE ID 124

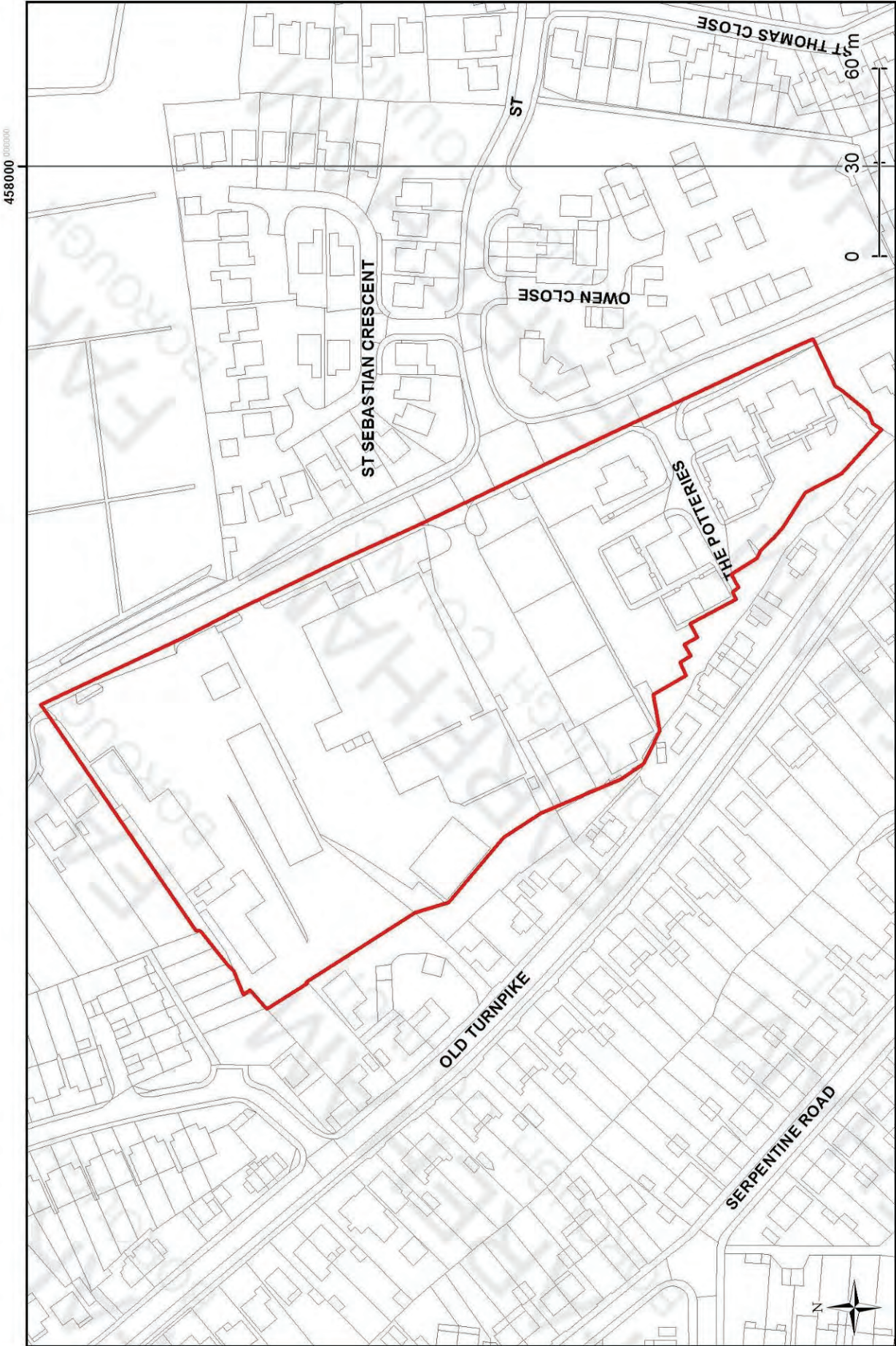
**SOLENT BUSINESS PARK -
SOLENT 2, SARISBURY**

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FBC EMPLOYMENT LAND STUDY – 2018

Site Address Kiln Acre, Wickham Road			
Site Ref	126		
Ward	Fareham East	Size	2.38 Ha
Market Segment	B1, B2, D2, sui generis		
Description of Site and Location:	<p>15,644 sq m of buildings The site is located off Wickham Road (west side of the road) (A32). The site is a combination of high quality B1 units to the south with a more untidy, larger and mixed use B2 and sui generis units to the north. The office area, known as “the Potteries” has a cul-de-sac layout with a single access off of Wickham Road serving multiple units, whereas the other units further to the north have individual access points.</p>		
Market Attractiveness Criteria			
1.1: Has the site been formally identified for employment for at least 10 years?			Yes
1.2: Has there been any recent development activity, within the last 5 years?			No
1.3: Is the site being actively marketed as an employment site?			Yes
1.4: Is the site owned by a developer or another agency known to undertake employment development?			Yes
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?			Yes
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?			Yes
1.7: Is the site immediately available?			Yes
Market Appraisal	<p>The site is located within a reasonable proximity of Fareham Town Centre and the services available there. It has no environmental or heritage constraints and has good vehicular access onto the strategic road network. However, parts of the site do suffer from a lack of building and landscaping quality and the site is less “B-use” focussed to the north where recent permissions for an ambulance station and a gym have altered the character. Expansion/intensification options are limited.</p>		
Adjacent land use and conflicts	<p>Kiln Acre is an employment area within the urban area. The site is bounded by residential development to the west, although it is raised above the employment uses.</p>		
Known constraints and infrastructure requirements	<p>Poorer quality buildings within close proximity to residential.</p>		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.			No
2.2: Is the site identified or likely to be required for a specific user or specialist use?			No
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?			No
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?			N/A
Strategic Planning and Access	<p>Various change of use applications.</p>		
Recommendation	<p>Site Score D – Below Average. The site offers a range of units for different uses. Although some of the building are of poorer quality, and it is within close proximity to residential, it does benefits from good vehicular access.</p>		



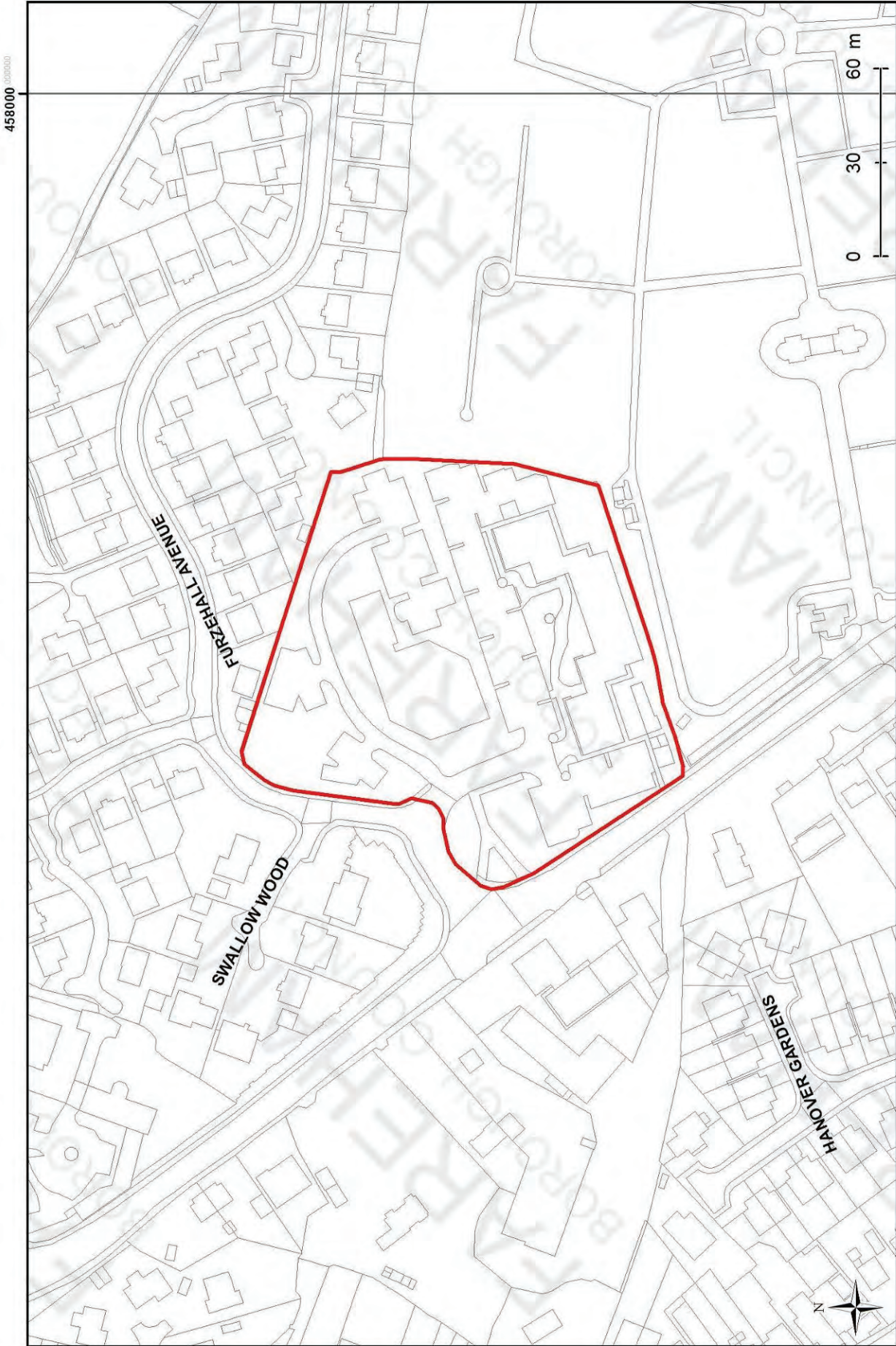
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FAREHAM
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Site ID:126 - Kiln Acre, Wickham Road, Fareham

FBC EMPLOYMENT LAND STUDY – 2018

Site Address Parkway, Wickham Road			
Site Ref	127		
Ward	Fareham East	Size	1.34 Ha
Market Segment	B1		
Description of Site and Location:	<p>5,790 sq m The site is located off Wickham Road (east side) (A32) and has a shared access with Furzehall Avenue. It consists of two reasonably modern office buildings with their own parking areas. The building to the north is set within a reasonably good landscaped environment, whilst the building to the south has given most of its surroundings away to parking. The southern building suffers from an undersupply of parking which is apparent most times of day by cars parked on the nearby highway and access points.</p>		
Market Attractiveness Criteria			
1.1: Has the site been formally identified for employment for at least 10 years?			Yes
1.2: Has there been any recent development activity, within the last 5 years?			No
1.3: Is the site being actively marketed as an employment site?			Yes
1.4: Is the site owned by a developer or another agency known to undertake employment development?			Yes
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?			Yes
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?			Yes
1.7: Is the site immediately available?			Yes
Market Appraisal	<p>The site has a reasonable access arrangement, although the southern building suffers from parking issues. The quality and style of the buildings means that the site is better suited for B1 than B2 or B8. There are limited opportunities for expansion or intensification given the proximity of residential dwellings and concerns over parking. If the Welborne development results in Junction 10 of the M27 becoming all-moves, this will increase the market attraction to the site.</p>		
Adjacent land use and conflicts	<p>The site comprises an employment area within the urban area. There is a cemetery to the east and south, residential to the north and is opposite a car dealership.</p>		
Known constraints and infrastructure requirements	<p>The site has shared access with the residential to the north and suffers from poor parking provision.</p>		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.			No
2.2: Is the site identified or likely to be required for a specific user or specialist use?			No
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?			No
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?			N/A
Strategic Planning and Access	<p>No relevant planning history.</p>		
Recommendation	<p>Site Score C – Average. The site comprises two office buildings of reasonable condition, in a convenient location off A32. Parking provision is inadequate so further expansion and intensification is unlikely.</p>		



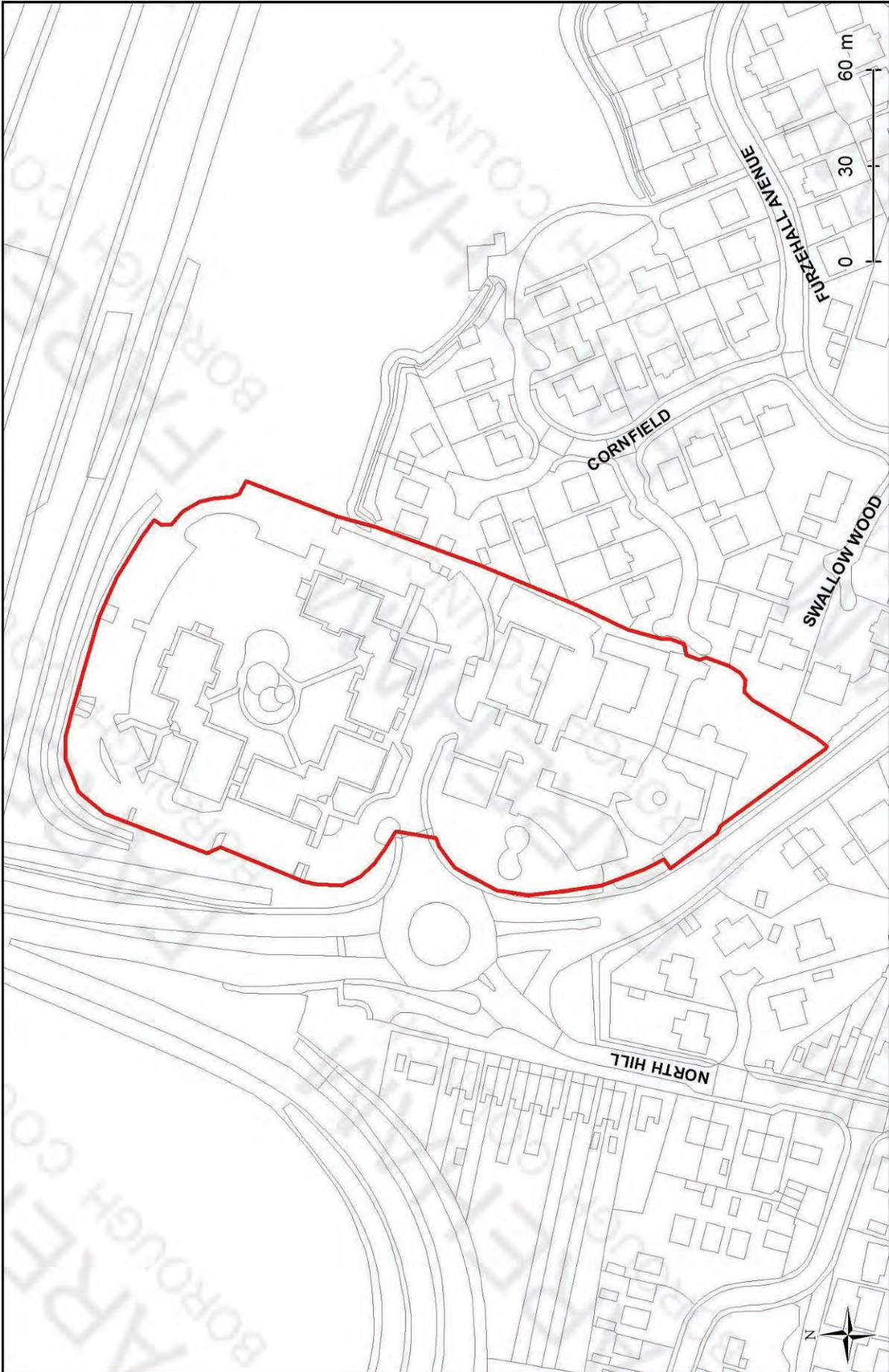
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Site ID:127 - Parkway, Wickham Road, Fareham

FBC EMPLOYMENT LAND STUDY – 2018

Site Address Furzehall Farm, Wickham Road			
Site Ref	128		
Ward	Fareham East	Size	1.96 Ha
Market Segment	B1 and sui generis		
Description of Site and Location:	<p>5,618 sq m</p> <p>The site is located off Wickham Road (east side) (A32) immediately south of junction 10 of M27. The site is split into two distinct area with the converted former farm buildings (some of which are listed) to the north and the more modern Furzehall Court and associated buildings to the south. Both have access off of Wickham Road via a designated arm of a roundabout. The site has decent landscaping and large areas of surface parking. Boundary reduced to exclude residential conversion to north.</p>		
Market Attractiveness Criteria			
1.1: Has the site been formally identified for employment for at least 10 years?			Yes
1.2: Has there been any recent development activity, within the last 5 years?			No
1.3: Is the site being actively marketed as an employment site?			Yes
1.4: Is the site owned by a developer or another agency known to undertake employment development?			Yes
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?			Yes
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?			Yes
1.7: Is the site immediately available?			Yes
Market Appraisal	<p>The site is in close proximity to the M27, and has a prominent location off of a roundabout. If the Welborne development results in Junction 10 of the M27 becoming all-moves, this will increase the market attraction to the site. The site has good quality B1 facilities and a good layout. There are some small expansion possibilities for Furzehall Court, although extensions outside of the urban area boundary are unlikely to be considered acceptable.</p>		
Adjacent land use and conflicts	<p>The site comprises an employment area within the urban area, with countryside to the north.</p>		
Known constraints and infrastructure requirements	<p>Part of the site is outside urban area which may restrict development.</p>		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.			No
2.2: Is the site identified or likely to be required for a specific user or specialist use?			No
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?			No
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?			N/A
Strategic Planning and Access	<p>Erection of 2 office buildings in 2006.</p>		
Recommendation	<p>Site Score B – Above Average. The site has good quality B1 facilities and a good layout. There is scope for some expansion on the site although this will be constrained on areas outside the urban boundary. The access and its market appeal would improve if the road improvements, as part of the Welborne development, go ahead.</p>		



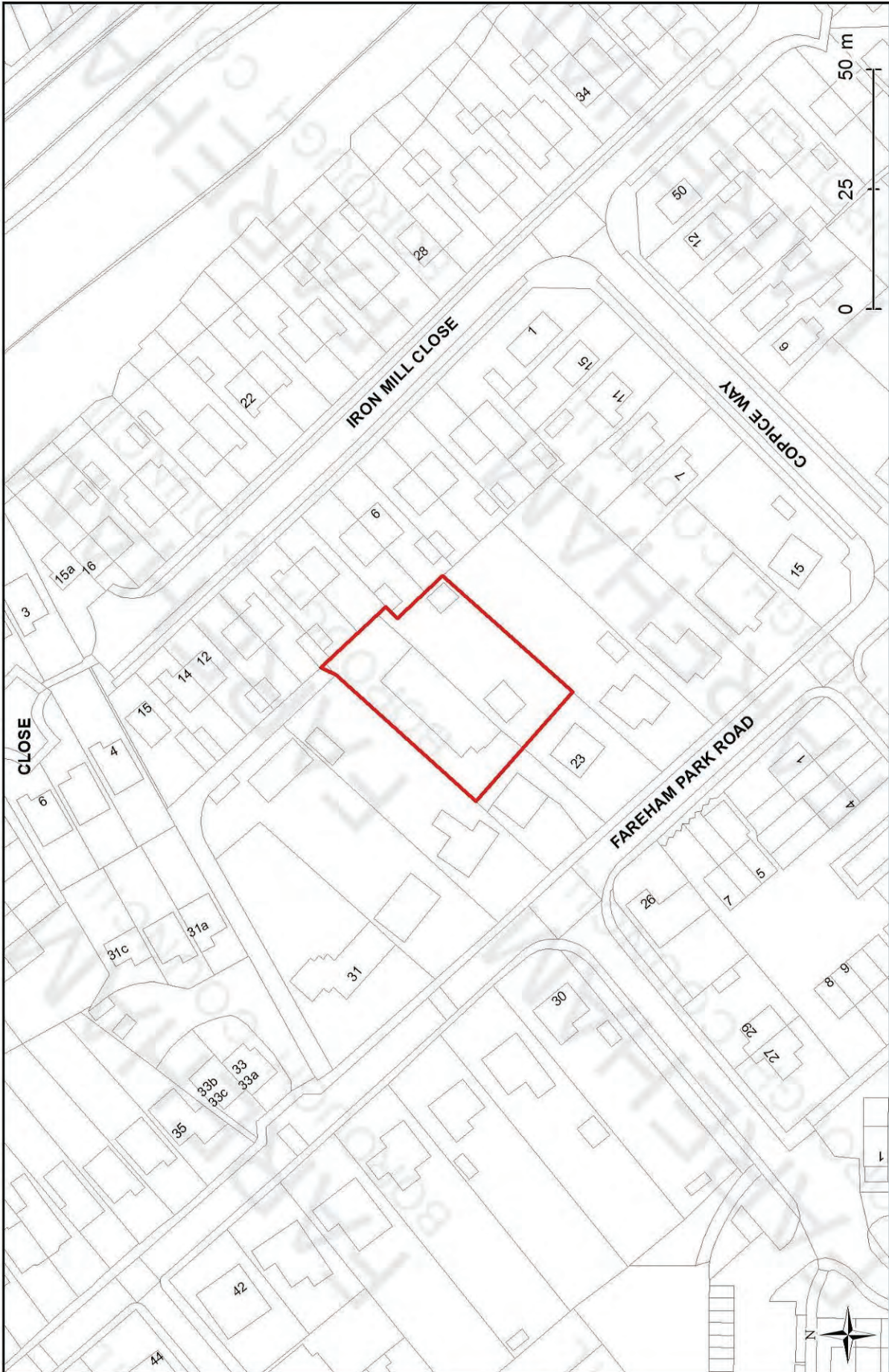
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Site ID:128 - Furzehall Farm, Wickham Road, Fareham

FBC EMPLOYMENT LAND STUDY – 2018

Site Address Barnbrook Systems			
Site Ref	133		
Ward	Fareham North West	Size	0.12 Ha
Market Segment	B1		
Description of Site and Location:	<p>956 sq m Barnbrook Systems is located off Fareham Park Road; a predominantly residential road, off Highlands Road which links to the A27. The site comprises two adjacent relatively modern B1 office buildings that are built to the rear of 23 and 25 Fareham Park Road. It is a very small site predominated by residential dwellings. The office buildings are 2 storey brick built units. The site has a single access between dwellings is narrow, and site has limited parking.</p>		
Market Attractiveness Criteria			
1.1: Has the site been formally identified for employment for at least 10 years?			Yes
1.2: Has there been any recent development activity, within the last 5 years?			No
1.3: Is the site being actively marketed as an employment site?			Yes
1.4: Is the site owned by a developer or another agency known to undertake employment development?			Yes
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?			No
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?			N/A
1.7: Is the site immediately available?			Yes
Market Appraisal	<p>The site is a reasonable B1 office building in an out of centre location, which suffers from poor road access and limited parking, but is relatively close to the local amenities of Highlands Road. The site has been built for specific occupier and it is not considered likely that alternative occupiers would find the location appealing if the current occupier vacated. Therefore not considered worthy of long term protection.</p>		
Adjacent land use and conflicts			
Known constraints and infrastructure requirements	The site suffers from poor access with limited parking.		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.			No
2.2: Is the site identified or likely to be required for a specific user or specialist use?			No
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?			No
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?			N/A
Strategic Planning and Access	No relevant planning history.		
Recommendation	<p>Site Score E – Low. The site comprises offices of reasonable quality and whilst the occupier remains in situ this use will prevail however when the occupier vacates its accessibility and location is unlikely to appeal to other occupiers leading to redevelopment prospects in the medium to long term.</p>		



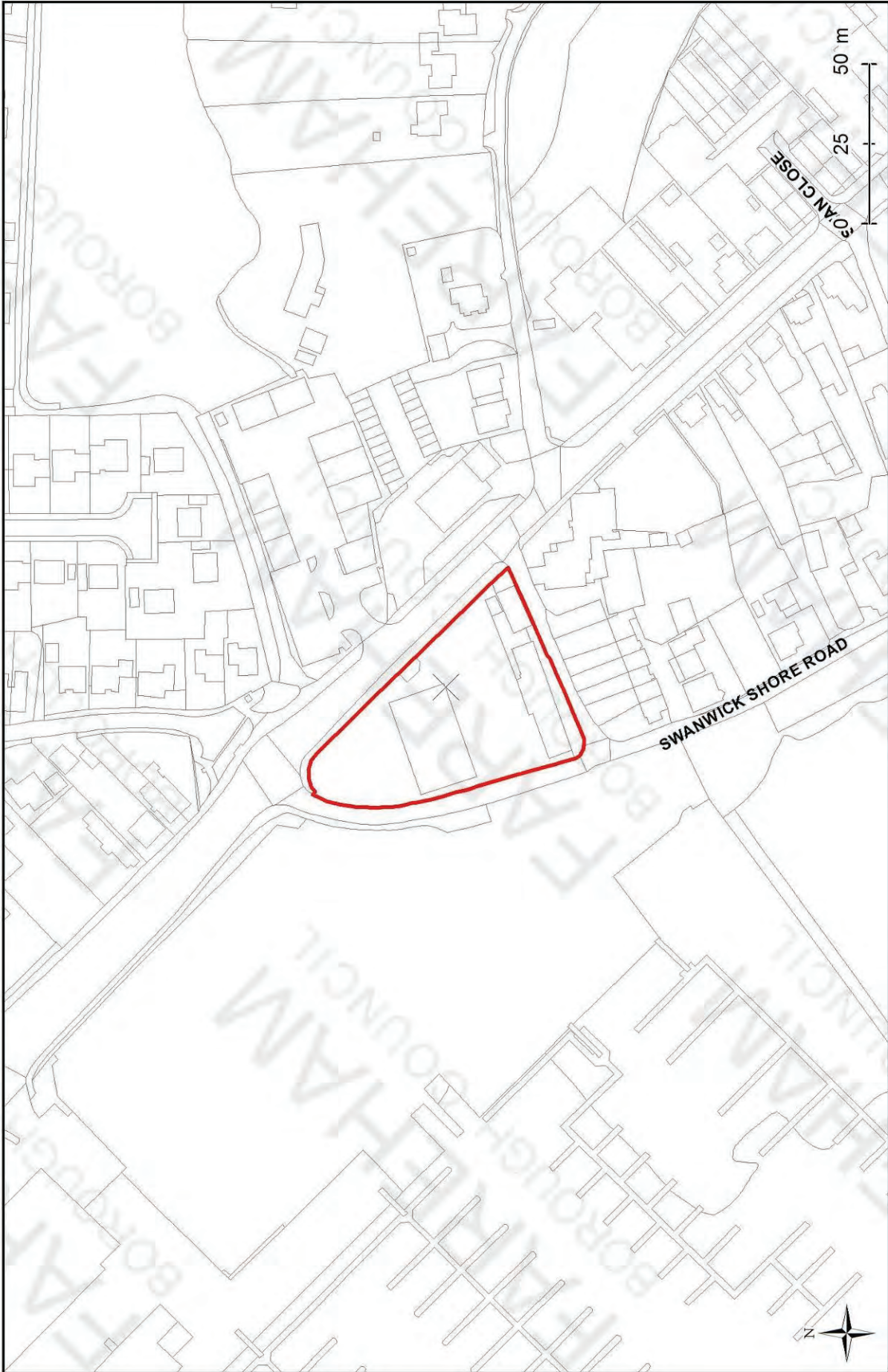
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Site ID:133 - Barnbrook Systems

FBC EMPLOYMENT LAND STUDY – 2018

Site Address Swanwick Shore Road			
Site Ref	137		
Ward	Sarisbury	Size	0.36 Ha
Market Segment	B1c/B2		
Description of Site and Location:	<p>2,279 sq m of buildings The site is located between Swanwick Shore Road and Bridge Road (A27) south east of Swanwick Marina. The site comprises a large older style industrial sheds located adjacent to Swanwick Marina (Site 104). The site was included in the wider permission for redevelopment of the marina which would result in the industrial floorspace moving from this part of the site to further north, with this section being redeveloped for housing.</p>		
Market Attractiveness Criteria			
1.1: Has the site been formally identified for employment for at least 10 years?			No
1.2: Has there been any recent development activity, within the last 5 years?			No
1.3: Is the site being actively marketed as an employment site?			No
1.4: Is the site owned by a developer or another agency known to undertake employment development?			Yes
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?			No
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?			Yes
1.7: Is the site immediately available?			Yes
Market Appraisal	The site has been vacant for some time, most likely in preparation for redevelopment. The site currently suffers from poor building quality.		
Adjacent land use and conflicts	Swanwick Marina lies to the north west of the site with residential to the north and Swanwick Business Park to the east. The Old Ship pub is located to the south of the site.		
Known constraints and infrastructure requirements	The site is within an urban area and forms residential part of permitted wider redevelopment of Swanwick Marina.		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.			No
2.2: Is the site identified or likely to be required for a specific user or specialist use?			No
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?			Yes
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?			N/A
Strategic Planning and Access	No relevant planning history.		
Recommendation	Site Score B – Above Average. The site is currently disused and therefore should, as it has, be considered as part of the wider redevelopment of Swanwick Marina.		



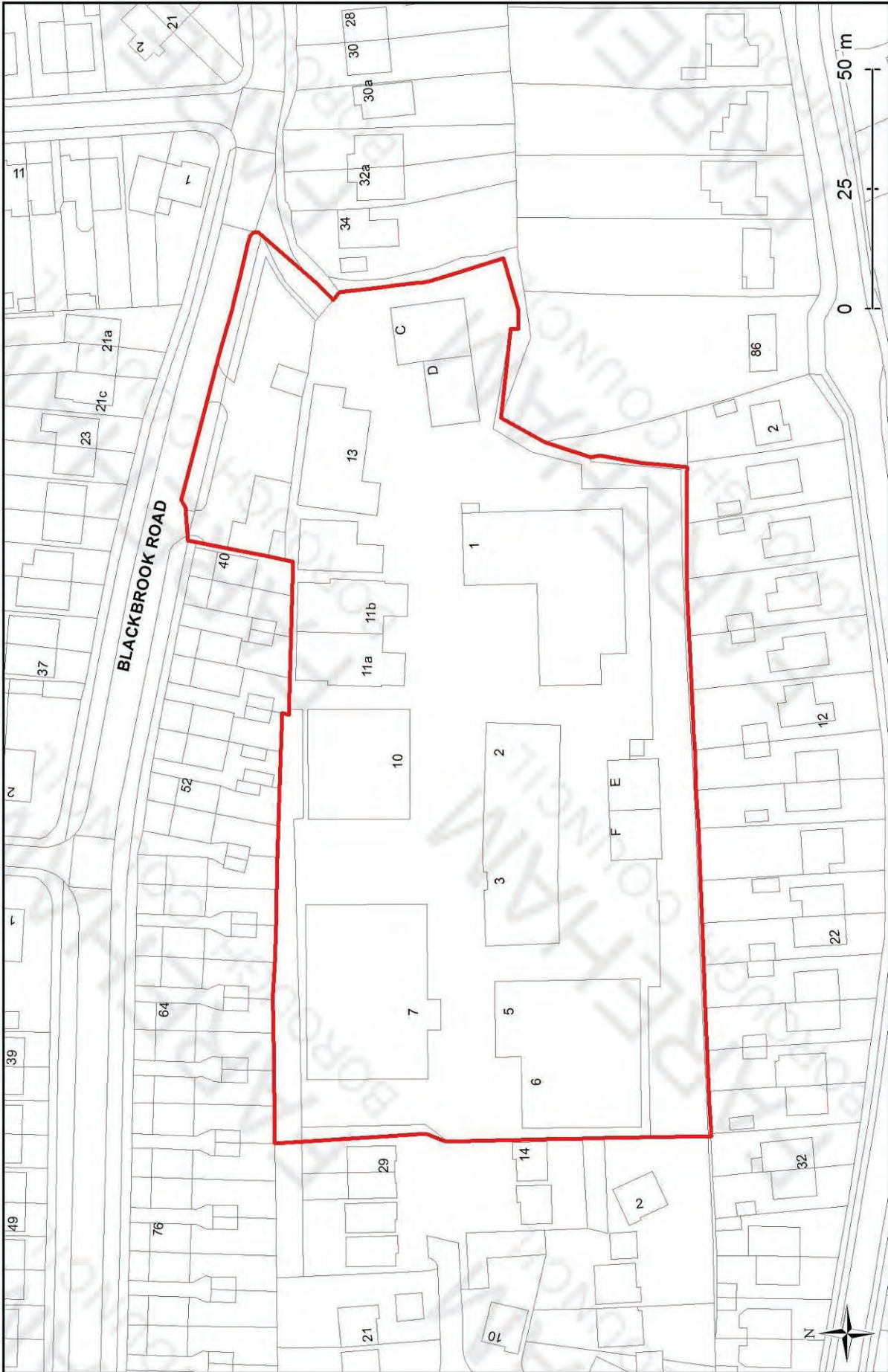
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Site ID:137 - Swanwick Shore Road

FBC EMPLOYMENT LAND STUDY – 2018

Site Address Blackbrook Road Industrial Estate			
Site Ref	138		
Ward	Fareham West	Size	1.69 Ha
Market Segment	B1c,B2		
Description of Site and Location:	<p>9,804 sq m of buildings Blackbrook is an industrial estate between Blackbrook Road and Jonathan Road/Blackbrook Park Avenue. It is a medium sized industrial estate consisting of a number of single or two storey sheds, mostly brick based with green/blue cladding. There is a single access road through site and out onto Blackbrook Road.</p>		
Market Attractiveness Criteria			
1.1: Has the site been formally identified for employment for at least 10 years?			No
1.2: Has there been any recent development activity, within the last 5 years?			No
1.3: Is the site being actively marketed as an employment site?			Yes
1.4: Is the site owned by a developer or another agency known to undertake employment development?			Yes
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?			No
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?			Yes
1.7: Is the site immediately available?			Yes
Market Appraisal	<p>Site benefits from good quality buildings in a regular layout. The sites location away from the strategic road network influences the public transport links and the sites prominence. The surrounding residential development would restrict the types of uses allowed in future. The industrial estate has shrunk in size in previous years, with land to the west given over to residential.</p>		
Adjacent land use and conflicts	<p>The site is located within an urban area and is surrounded on all sides by residential development.</p>		
Known constraints and infrastructure requirements	<p>The site is within close proximity to residential.</p>		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.			No
2.2: Is the site identified or likely to be required for a specific user or specialist use?			No
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?			No
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?			N/A
Strategic Planning and Access	<p>Some resi development approval.</p>		
Recommendation	<p>Site Score D – Below Average. The site provides industrial units and buildings for small business and start-ups which serves an important function in the market whilst demand remains. However some of the site has already been redeveloped for residential which is a suitable alternative use considering it is surrounded by residential.</p>		



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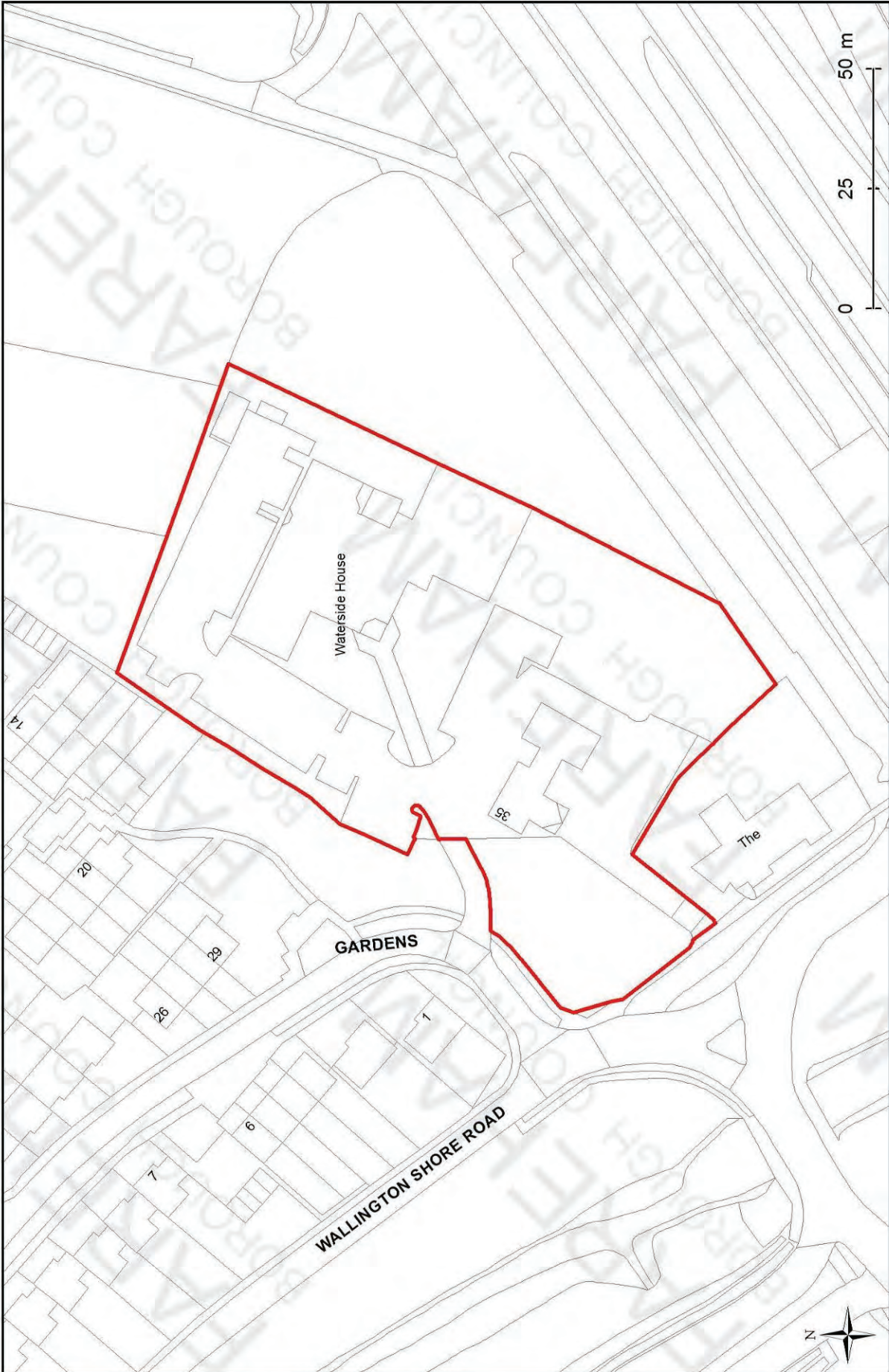
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Site ID:138 - Blackbrook Road Industrial Estate

FBC EMPLOYMENT LAND STUDY – 2018

Site Address Waterside House, North of Delme Roundabout			
Site Ref	139		
Ward	Fareham East	Size	1.28 Ha
Market Segment	B1		
Description of Site and Location:	<p>3,796 sq m</p> <p>The office buildings are located off Waterside Gardens, adjacent to the A27, north of Delme roundabout. Waterside House comprises a modern looking office development of mainly 2 storey brick buildings. There is one large building to the north of the site, with a smaller block to the south. There is ample parking provided on site alongside good quality landscaping.</p>		
Market Attractiveness Criteria			
1.1: Has the site been formally identified for employment for at least 10 years?			Yes
1.2: Has there been any recent development activity, within the last 5 years?			No
1.3: Is the site being actively marketed as an employment site?			Yes
1.4: Is the site owned by a developer or another agency known to undertake employment development?			Yes
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?			Yes – Horatio Properties (Guernsey) Ltd, DU International Ltd, private owner
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?			Yes
1.7: Is the site immediately available?			Yes
Market Appraisal	<p>The site offers good quality buildings and layout of the site coupled with its environmental quality ensures the site scores highly. The site suffers from peak time congestion given its place adjacent to Delme roundabout, although this does ensure relatively easy car and HGV access to the M27. The site has suffered from relatively high vacancy rates although it has recently been let to Wartsila, who are unlikely to operate its break. The only possible area for expansion would be utilising an area outside of the urban area boundary which is likely to be contrary to policy. Redevelopment for an alternative use seems unlikely as there is too much value in the existing building.</p>		
Adjacent land use and conflicts	<p>The site is within an urban area adjacent to the countryside boundary. There is an area of open space designated either side of route into site.</p>		
Known constraints and infrastructure requirements	<p>The site suffers from peak time congestion.</p>		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.			No
2.2: Is the site identified or likely to be required for a specific user or specialist use?			No
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?			No
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?			N/A
Strategic Planning and Access	<p>No relevant planning history.</p>		
Recommendation	<p>Site Score D – Below Average. The site provides a substantial office building and due to its inherent value, we anticipate this use is likely to continue.</p>		



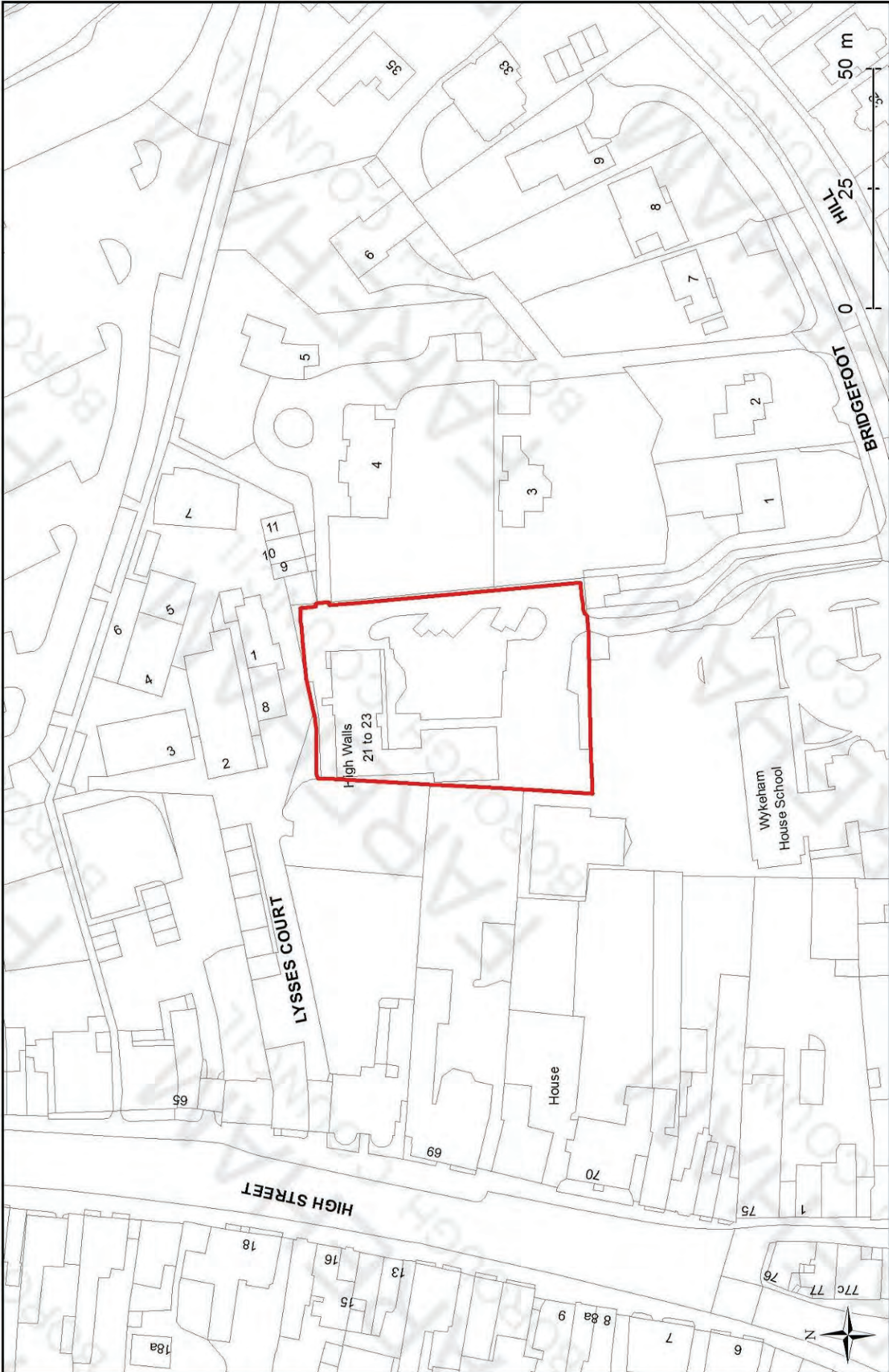
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Site ID:139 - Waterside House

FBC EMPLOYMENT LAND STUDY – 2018

Site Address High Walls, North of East Street			
Site Ref	161		
Ward	Fareham East	Size	0.23 Ha
Market Segment	B1		
Description of Site and Location:	<p>1,431 sq m The site is located off the High Street in Fareham Town Centre and is adjacent to Lysses Count. It is accessed via a narrow, single lane road off of East Street. The site consists of a large 2 and a half storey office block with associated surface area car park.</p>		
Market Attractiveness Criteria			
1.1: Has the site been formally identified for employment for at least 10 years?			Yes
1.2: Has there been any recent development activity, within the last 5 years?			No
1.3: Is the site being actively marketed as an employment site?			Yes
1.4: Is the site owned by a developer or another agency known to undertake employment development?			Yes
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?			No
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?			Yes
1.7: Is the site immediately available?			Yes
Market Appraisal	<p>The site is in close proximity to Fareham Town Centre and associated amenities and services; it is also close to the strategic road network and the M27 (via junction 11). Congestion and the narrow access point are problematic and make sure the site is better suited for offices rather than B2/B8. There is limited room for expansion as most of the site is either buildings or car parking.</p>		
Adjacent land use and conflicts	<p>High Walls is an urban area site within the High Street conservation area. Site is bordered by residential development a private school and a mix used employment area (Lysses Court, site 85).</p>		
Known constraints and infrastructure requirements	<p>The site suffers from congestion and poor access.</p>		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.			No
2.2: Is the site identified or likely to be required for a specific user or specialist use?			No
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?			No
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?			N/A
Strategic Planning and Access	<p>No relevant planning history.</p>		
Recommendation	<p>Site Score D – Below Average. The site offers reasonable office space, within close proximity to the town centre. However there is little scope for expansion and the site has poor access with congestion, so it is likely to be more suitable for alternative uses in the medium to long term.</p>		



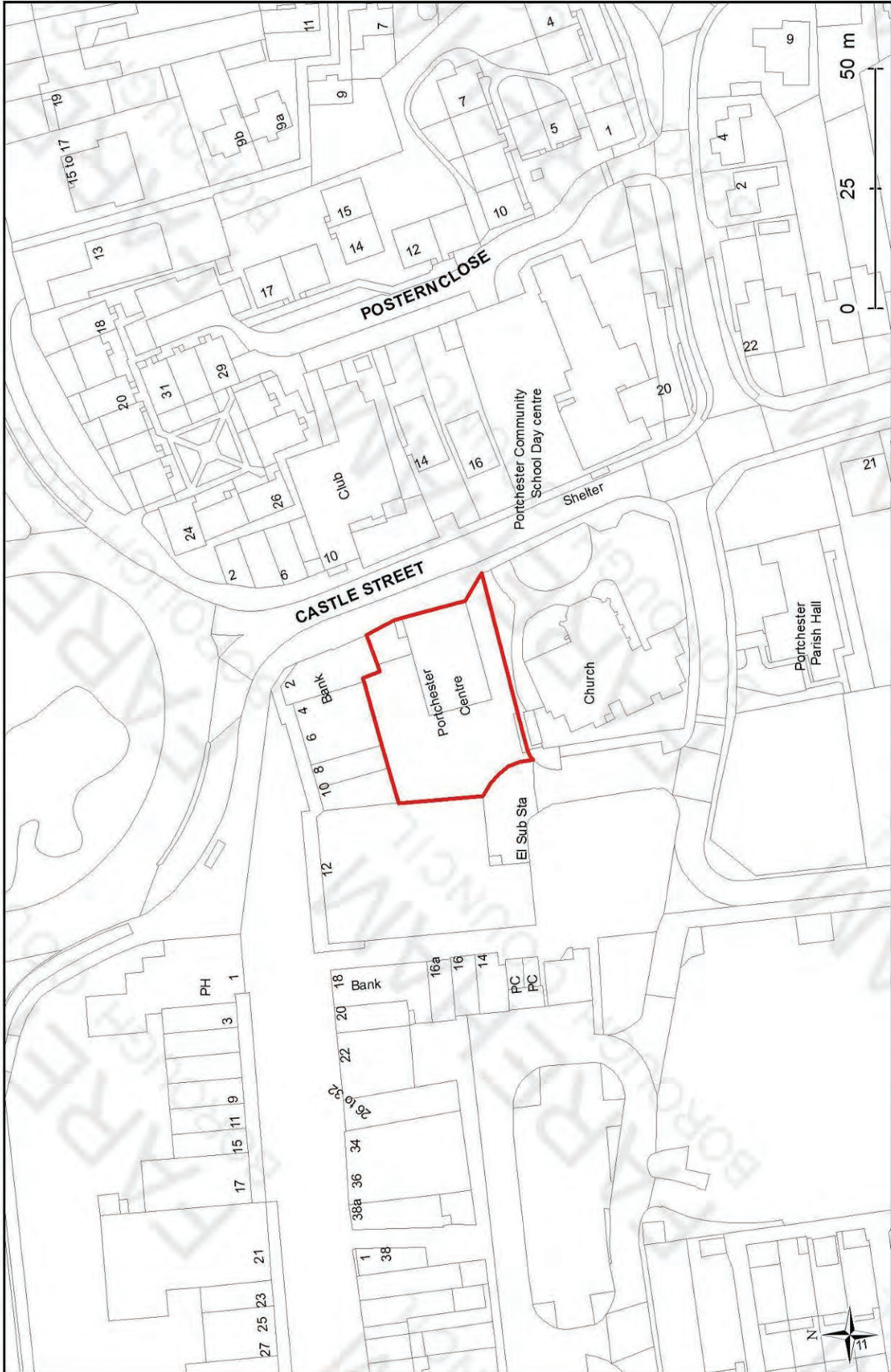
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Site ID:161 - High Walls

FBC EMPLOYMENT LAND STUDY – 2018

Site Address Castle Court, northern end of Castle Street			
Site Ref	163		
Ward	Portchester East	Size	0.11 Ha
Market Segment	B1		
Description of Site and Location:	888 sq m The site comprises a single office block on west side of Castle Street. The building is a 3 storey office block within the District Centre boundary. The building is brick built and flat roofed and is the only purpose built office block within Portchester District centre.		
Market Attractiveness Criteria			
1.1: Has the site been formally identified for employment for at least 10 years?			Yes
1.2: Has there been any recent development activity, within the last 5 years?			No
1.3: Is the site being actively marketed as an employment site?			Yes
1.4: Is the site owned by a developer or another agency known to undertake employment development?			No
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?			No
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?			Yes
1.7: Is the site immediately available?			Yes
Market Appraisal	The site is within a District Centre, and as such is sequentially preferable for office development. The building is of reasonable quality and has good public transport and local amenities in close proximity. Expansion is very unlikely given that the site is mostly building or car parking.		
Adjacent land use and conflicts	The site is within the District Centre boundary for Portchester.		
Known constraints and infrastructure requirements	Expansion is very unlikely given that the site is mostly building or car parking.		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.			No
2.2: Is the site identified or likely to be required for a specific user or specialist use?			No
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?			No
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?			N/A
Strategic Planning and Access	No relevant planning history.		
Recommendation	Site Score D – Below Average. The site offers the only purpose built office accommodation within Portchester and has good access to local amenities and the A27.		



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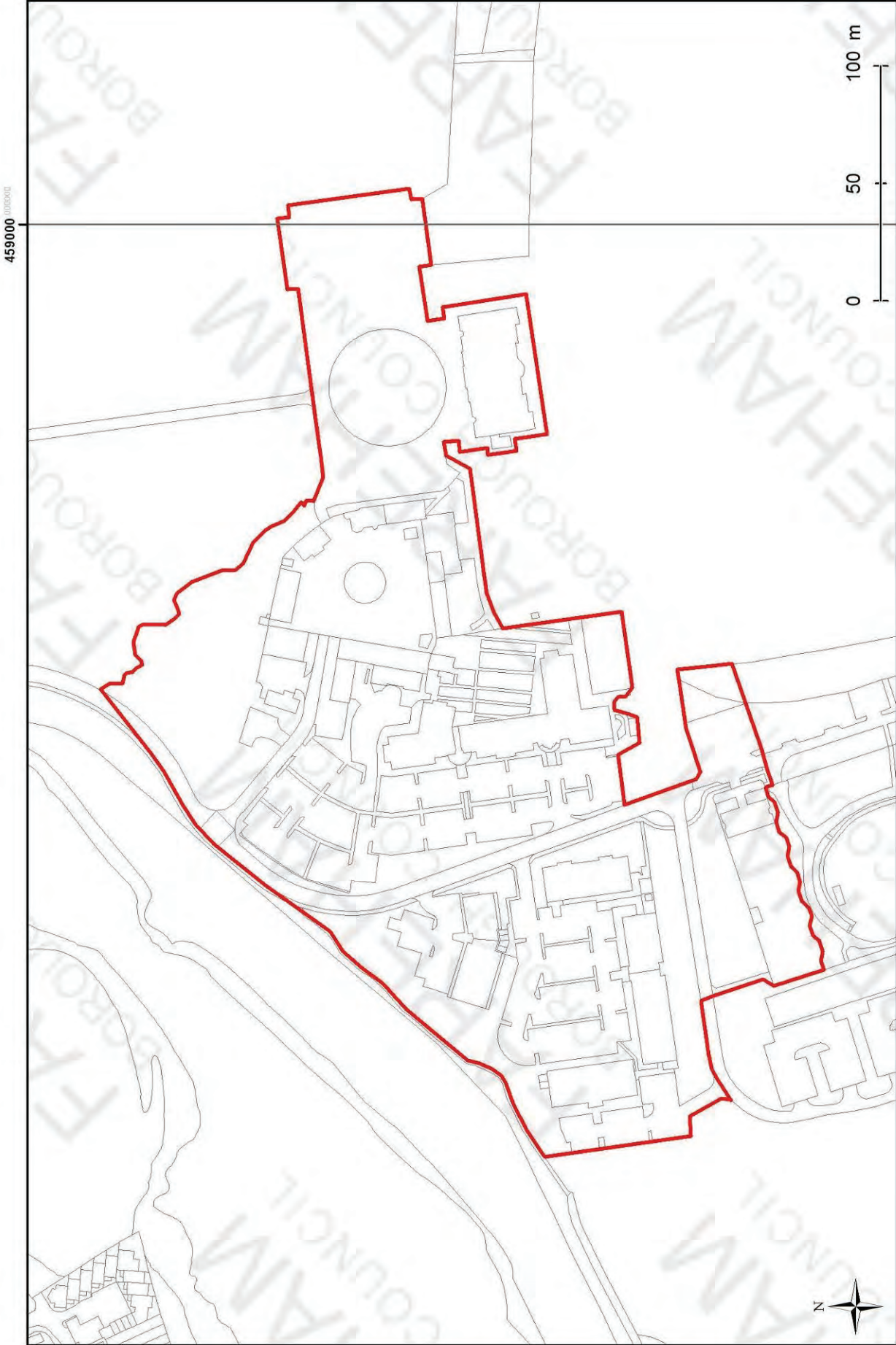
FAREHAM
BOROUGH COUNCIL

Site ID:163 - Castle Court

FBC EMPLOYMENT LAND STUDY – 2018

Site Address Cams Estate			
Site Ref	165		
Ward	Portchester West	Size	6.77 Ha
Market Segment	B1		
Description of Site and Location:	<p>18,952 sq m The business park is a large, high quality office location, part built part converted outbuildings of country house. It is set within landscaped conservation area. The office buildings are a mix of materials but all are designed to fit within conservation area. There is ample car parking is provided and a key component of the site is the availability and capacity of the fibre optic links.</p>		
Market Attractiveness Criteria			
1.1: Has the site been formally identified for employment for at least 10 years?			Yes
1.2: Has there been any recent development activity, within the last 5 years?			Yes
1.3: Is the site being actively marketed as an employment site?			Yes
1.4: Is the site owned by a developer or another agency known to undertake employment development?			Yes
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?			Yes – Heaton Hall Ltd, Heaton Property Investments Ltd, Sreit Property Ltd, Wilky Property Holdings Ltd, Strand Harbour Securities Ltd
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?			Yes
1.7: Is the site immediately available?			Yes
Market Appraisal	<p>The site benefits from high quality buildings, landscaping and layout making it an attractive office location. However, the site has limited public transport links and is heavily constrained by its position within a conservation area and the countryside. There are some potential areas for expansion (Walled Garden, site 1999) but given the sites location any proposal will need to be suitably designed.</p>		
Adjacent land use and conflicts	<p>The site is within countryside, coastal zone, local gap, historic parks and gardens boundaries and is also within Cams Hall conservation area. Adjacent to mooring restricted area and site of special scientific interest.</p>		
Known constraints and infrastructure requirements	<p>The estate is constrained by its position within a conservation area and the countryside.</p>		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.			No
2.2: Is the site identified or likely to be required for a specific user or specialist use?			No
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?			No
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?			N/A
Strategic Planning and Access	No relevant planning history.		

Recommendation	Site Score A – High. The site offers grade A office location in a quality business park setting and although local amenities and transport links are limited, it is a popular office location.
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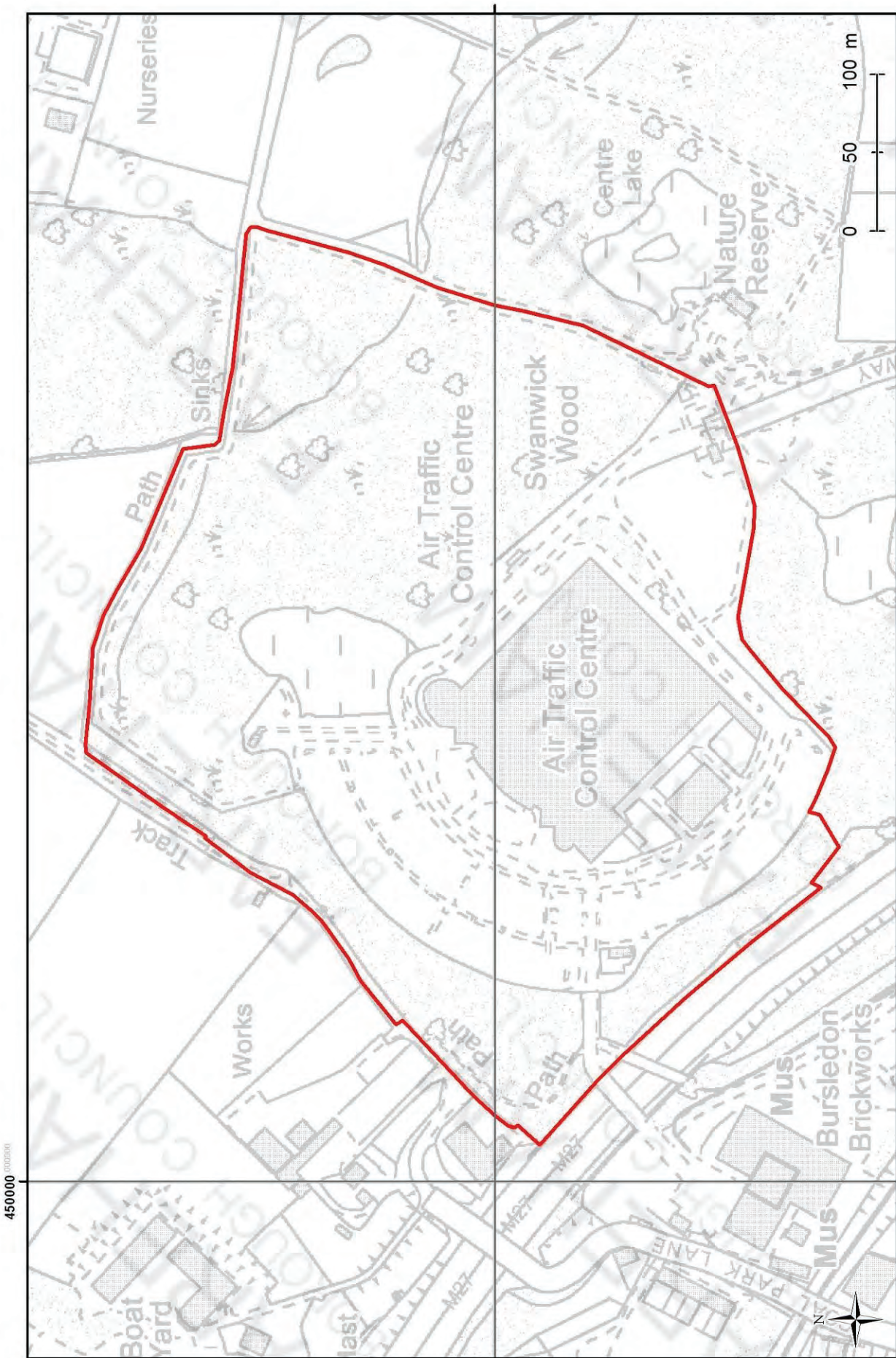
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Site ID:165 - Cams Estate

FBC EMPLOYMENT LAND STUDY – 2018

Site Address National Air Traffic Services (NATS)			
Site Ref	173		
Ward	Sarisbury	Size	17.33 Ha
Market Segment	B1		
Description of Site and Location:	<p>59,625 sq m The site comprises a large office building, which is occupied by NATS at the end of Sopwith Way. It comprises a three storey office building, built for a specific user. It is surrounded by car parking on two sides and completely surrounded by fencing and woodland, part of which is a nature reserve.</p>		
Market Attractiveness Criteria			
1.1: Has the site been formally identified for employment for at least 10 years?			Yes
1.2: Has there been any recent development activity, within the last 5 years?			No
1.3: Is the site being actively marketed as an employment site?			Yes
1.4: Is the site owned by a developer or another agency known to undertake employment development?			No
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?			No
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?			Yes
1.7: Is the site immediately available?			Yes
Market Appraisal	<p>The site is poorly serviced by public transport and is located well away from any local amenities. However the landscaping and environmental quality in general is of a very high standard. The road access is also reasonable.</p>		
Adjacent land use and conflicts	<p>This countryside site is adjacent to a nature reserve, a site of importance for nature conservation and area of special landscape character.</p>		
Known constraints and infrastructure requirements	<p>The site has poor access to public transport and is distanced from local amenities.</p>		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.			No
2.2: Is the site identified or likely to be required for a specific user or specialist use?			Yes
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?			No
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?			N/A
Strategic Planning and Access	<p>2008 - Erection Of Two Storey 24 Bedroom Rest Facility.</p>		
Recommendation	<p>Site Score C – Average. The site offers a purpose built facility for NATS, which is likely to continue to serve this long standing tenant.</p>		



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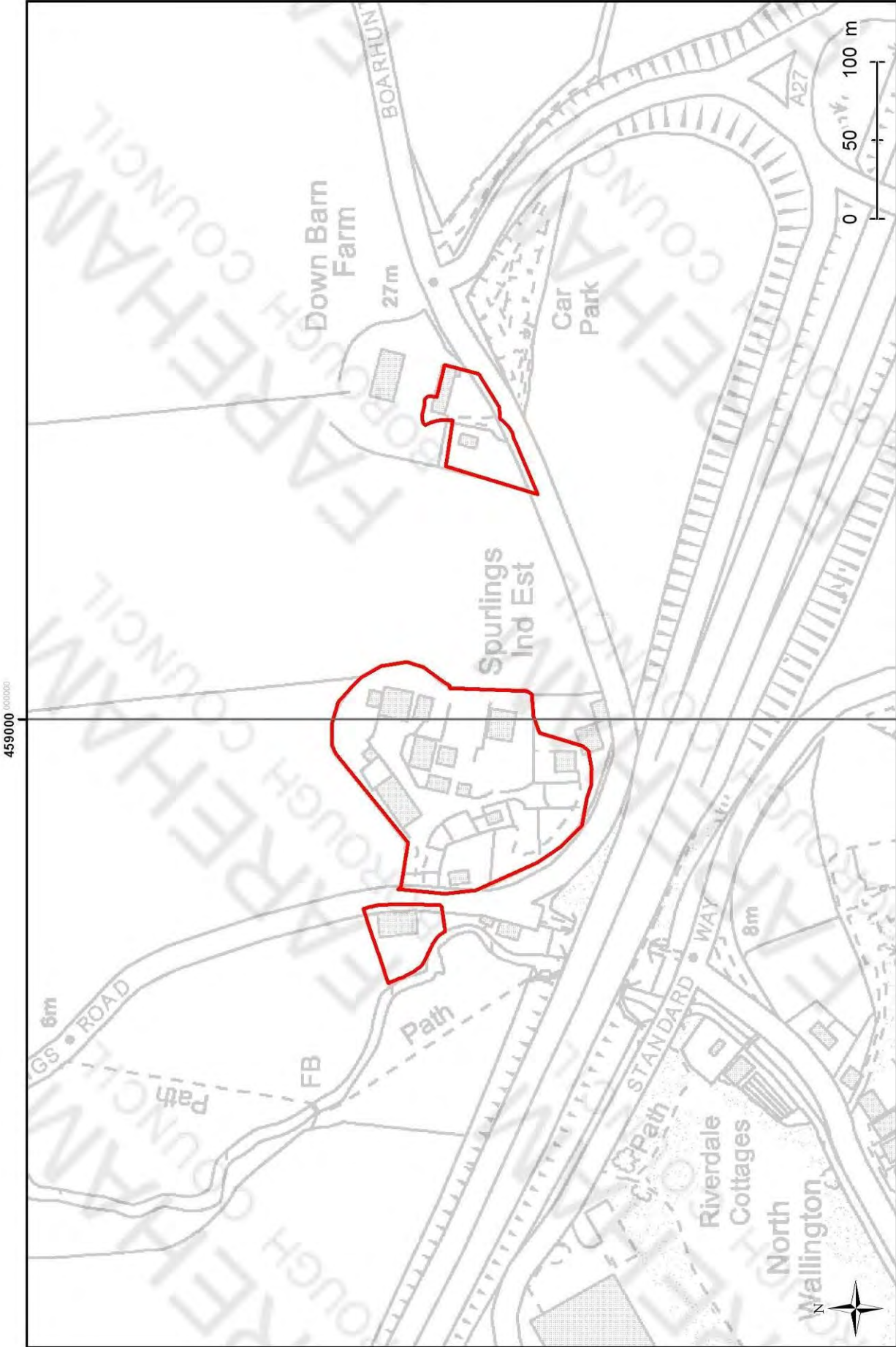
Site ID:173 - National Air Traffic Services (NATS)

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FBC EMPLOYMENT LAND STUDY – 2018

Site Address Spurlings Road Industrial Estate & Riverside Yard			
Site Ref	179 (inc. 3141)		
Ward	Fareham East	Size	2.11 Ha
Market Segment	B1, B2, B8, mostly B2		
Description of Site and Location:	<p>4,120 sq m Spurlings Road is an existing industrial estate within a proposed employment area designation. It is a mixed site; Spurlings yard and Riverside yard are purpose built industrial yards, with a number of modern additions at Spurlings Yard, mainly consisting of clad sheds. Down Barn Farm consists of two former barns converted into B2 sheds.</p>		
Market Attractiveness Criteria			
1.1: Has the site been formally identified for employment for at least 10 years?			Yes
1.2: Has there been any recent development activity, within the last 5 years?			No
1.3: Is the site being actively marketed as an employment site?			Yes
1.4: Is the site owned by a developer or another agency known to undertake employment development?			No
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?			No
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?			Yes
1.7: Is the site immediately available?			Yes
Market Appraisal	<p>The countryside location means the site scores poorly in terms of public transport and local amenities. The site suffers from low environmental quality despite being in the countryside and is difficult to access for HGV's. It is however within close proximity to the M27 and we anticipate it being retained for employment uses.</p>		
Adjacent land use and conflicts	<p>Whole of site is in the countryside, Down Barn Farm is also located within an area of special landscape character.</p>		
Known constraints and infrastructure requirements	<p>The site has poor access to public transport and HGV access.</p>		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.			No
2.2: Is the site identified or likely to be required for a specific user or specialist use?			No
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?			No
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?			No
Strategic Planning and Access	<p>Erection of replacement industrial/storage buildings.</p>		
Recommendation	<p>Site Score E – Low. The estate offers employment space within a rural setting and whilst is poorly located in terms of HGV access, local amenities and public transport, it is within close proximity of J11 of the M27.</p>		



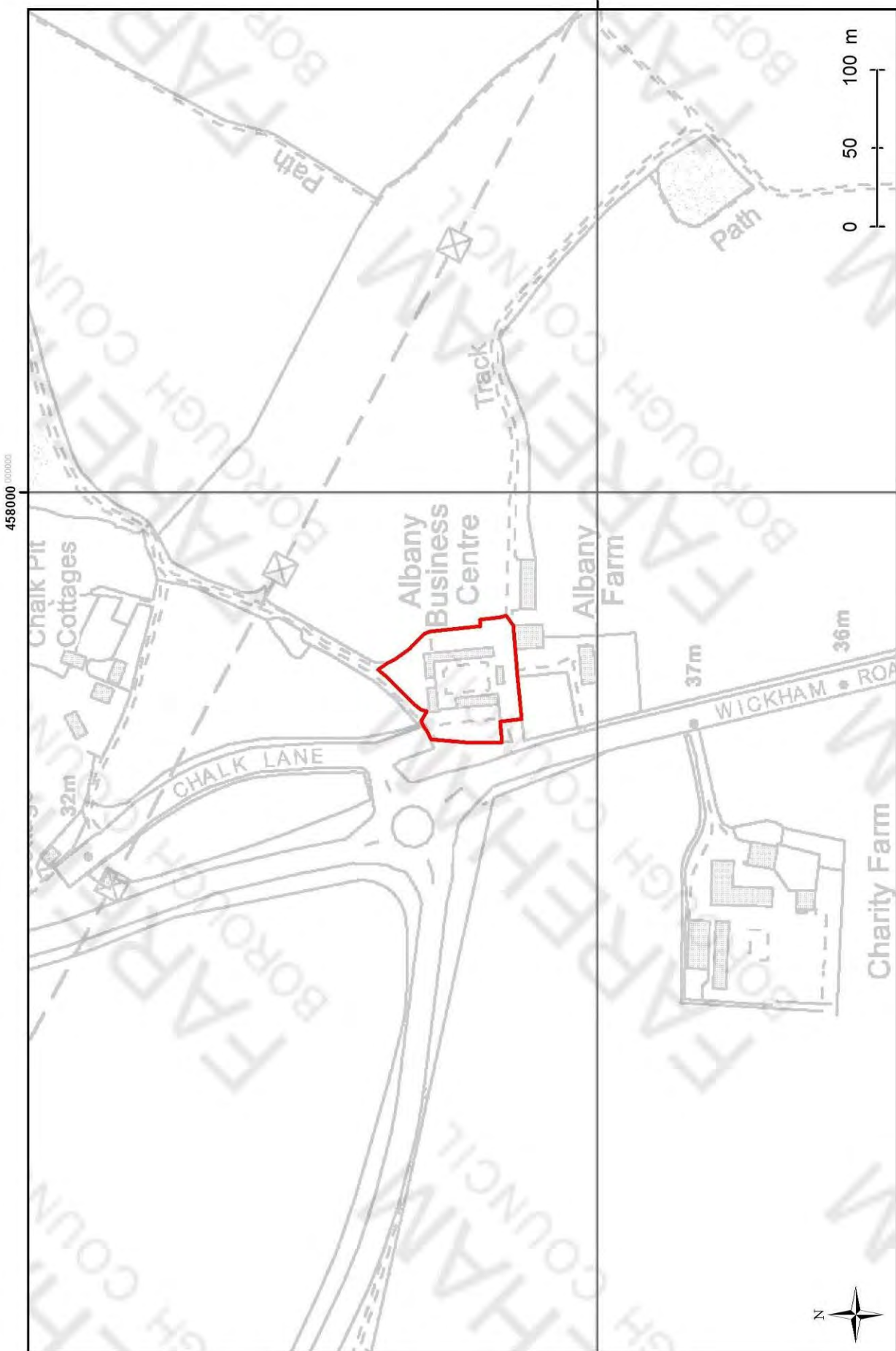
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Site ID:179 - Spurlings Road & Down Barn Farm

FBC EMPLOYMENT LAND STUDY – 2018

Site Address Albany Business Centre, Fareham			
Site Ref	186		
Ward	Fareham East	Size	0.5 Ha
Market Segment	B1 & B2		
Description of Site and Location:	<p>572 sq m Albany Business Centre is located on the east side of Wickham Road. It comprises converted stables which have been converted into small B1, B2 units set out in a court yard layout with car parking around the outside. The site has single access off the roundabout on Wickham Road.</p>		
Market Attractiveness Criteria			
1.1: Has the site been formally identified for employment for at least 10 years?			Yes
1.2: Has there been any recent development activity, within the last 5 years?			No
1.3: Is the site being actively marketed as an employment site?			Yes
1.4: Is the site owned by a developer or another agency known to undertake employment development?			No
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?			No
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?			Yes
1.7: Is the site immediately available?			Yes
Market Appraisal	The converted stables are of reasonable quality with easy access to Wickham Road via roundabout. Its location out of centre means it is perhaps better suited for alternative uses.		
Adjacent land use and conflicts	Adjacent to the proposed Welborne development.		
Known constraints and infrastructure requirements	The site is accessed via a single track.		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.			No
2.2: Is the site identified or likely to be required for a specific user or specialist use?			No
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?			Yes
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?			N/A
Strategic Planning and Access	No relevant planning history.		
Recommendation	<p>Site Score C – Average. The site has reasonable access to M27 J10 via Wickham Road. The site is relatively isolated and is surrounded by fields however the proposed Welborne development is planned adjacent which would provide some context to this site. Given its proximity to Welborne, it presents medium term redevelopment prospects.</p>		



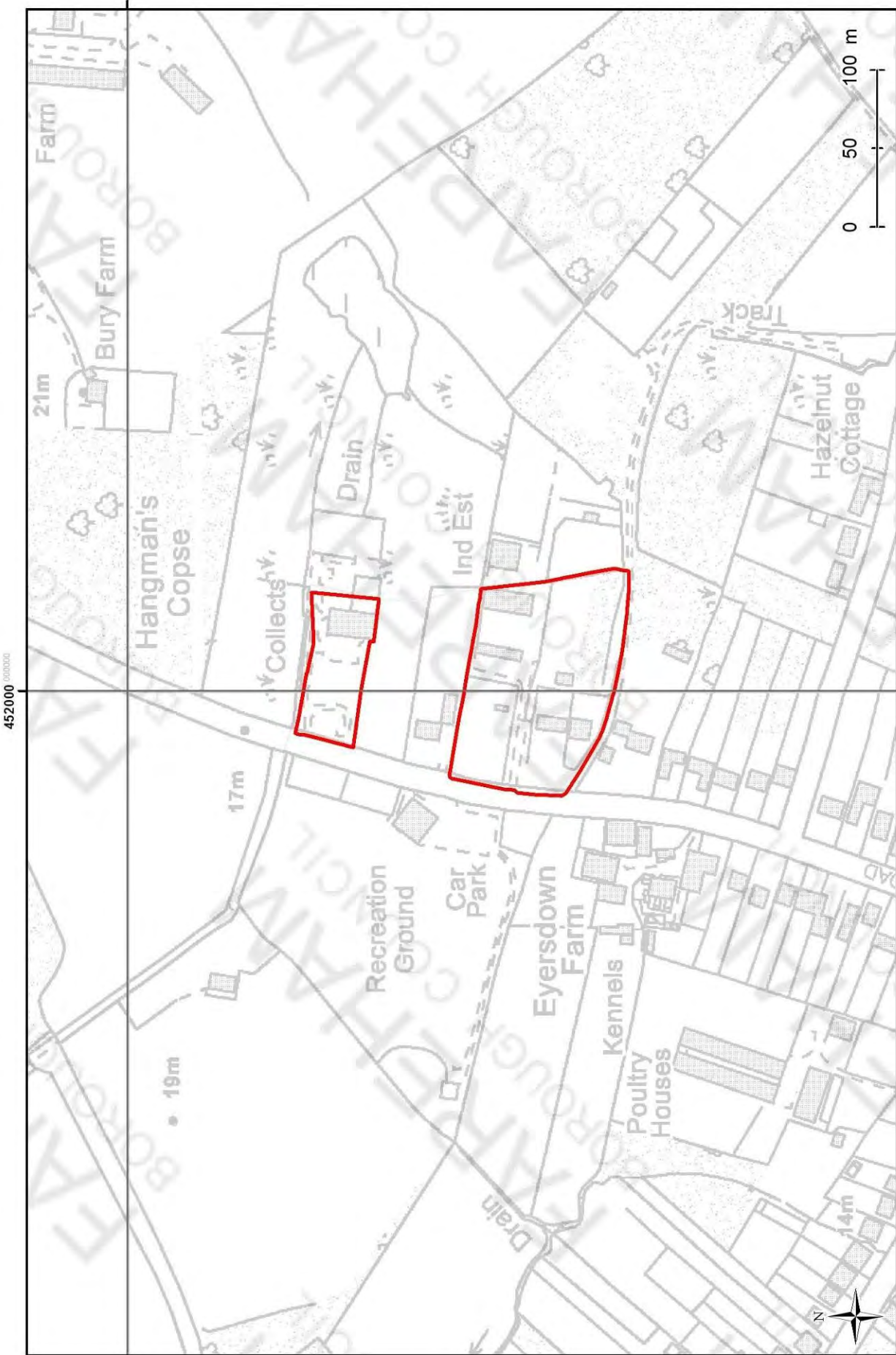
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Site ID:186 - Albany Business Centre

FBC EMPLOYMENT LAND STUDY – 2018

Site Address 310A-312 & 316 Botley Road			
Site Ref	187		
Ward	Sarisbury	Size	1.59 Ha
Market Segment	B1, B2 & B8		
Description of Site and Location:	<p>1,747 sq m The sites are located on Botley Road (A3051) in Swanwick and comprise SML Technologies office and mix of employment buildings behind 310A-312 Botley Road. 316 Botley Road is a purpose single storey office block with associated parking and landscaping of reasonable quality. 310A-312 Botley Road is a more mixed site with a range of low density uses including some apparent open storage.</p>		
Market Attractiveness Criteria			
1.1: Has the site been formally identified for employment for at least 10 years?	Yes		
1.2: Has there been any recent development activity, within the last 5 years?	No		
1.3: Is the site being actively marketed as an employment site?	Yes		
1.4: Is the site owned by a developer or another agency known to undertake employment development?	No		
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?	Yes		
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?	Yes		
1.7: Is the site immediately available?	Yes		
Market Appraisal	The layout of the area is simple and road access is good. The site lacks prominence and is poorly served by public transport.		
Adjacent land use and conflicts	The site is in a relatively isolated location near the northern boundary with Winchester District.		
Known constraints and infrastructure requirements	No known constraints.		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.	No		
2.2: Is the site identified or likely to be required for a specific user or specialist use?	No		
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?	No		
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?	N/A		
Strategic Planning and Access	Various		
Recommendation	<p>Site Score D – Below Average. The sites, whilst in an isolated location, have relatively good road access along Botley Road, however they lack local amenities and public transport. 310A-312 Botley Road is a low density site with a large area of hardstanding currently used by the occupier for car sales display. We anticipate in the medium to long term this site will be considered for redevelopment for alternative uses.</p>		



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Site ID:187 - 310a-312 & 316 Botley Road

FBC EMPLOYMENT LAND STUDY – 2018

Site Address Land North of St Margaret's Roundabout			
Site Ref	205		
Ward	Titchfield	Size	1.23 Ha
Market Segment	Potential for extension to Segensworth South employment area.		
Description of Site and Location:	<p>The land is located on the corner of Southampton Road and Cartwright Drive.</p> <p>The site comprises a small paddock area north of St Margaret's roundabout and south of the former ATC buildings.</p> <p>Access to the site could potentially be provided from Cartwright Drive, Southampton Road or the access road to the former ATC buildings.</p>		
Market Attractiveness Criteria			
1.1: Has the site been formally identified for employment for at least 10 years?			No
1.2: Has there been any recent development activity, within the last 5 years?			No
1.3: Is the site being actively marketed as an employment site?			No
1.4: Is the site owned by a developer or another agency known to undertake employment development?			Yes
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?			No
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?			Yes
1.7: Is the site immediately available?			No
Market Appraisal	<p>Whilst the site is not currently identified as employment land its location within close proximity to the road network, would deem it suitable for B2/B8 uses, however it will be important to provide a sufficient buffer to the residential.</p>		
Adjacent land use and conflicts	<p>Residential development has recently been permitted on the former ATC buildings area to the north of the site.</p>		
Known constraints and infrastructure requirements	<p>Although the site is located in close proximity the A27 and the larger Segensworth South employment area, the recent permission for residential development to the north isolates this site from employment neighbours. This, combined with its location outside of the urban area, means that recommending the site for allocation for employment uses is considered inappropriate, especially considering the potential oversupply for B2/B8 uses in the Borough.</p>		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.			No
2.2: Is the site identified or likely to be required for a specific user or specialist use?			No
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?			No
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?			N/A
Strategic Planning and Access	No relevant planning history.		
Recommendation	<p>Site Score A – High. Although this site is outside the urban boundary, the sites location and access would make this site attractive to B2/B8 occupiers and we would recommend it is considered for these uses.</p>		



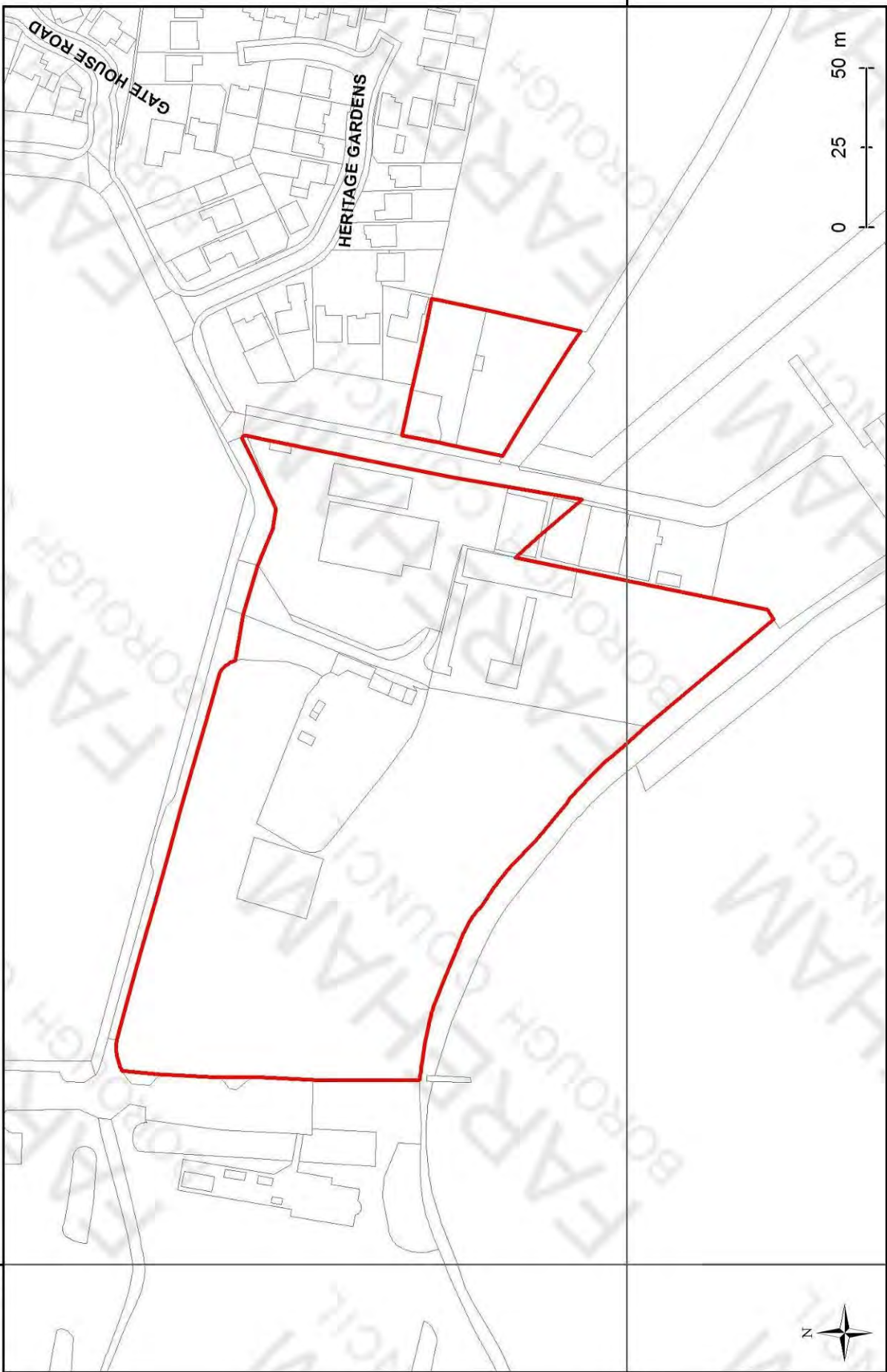
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Site ID:205 - Grazing Land North of A27 Roundabout

FBC EMPLOYMENT LAND STUDY – 2018

Site Address Cranleigh Road, Portchester (includes Wicor Farm, Lake Works and The Yard)			
Site Ref	1261		
Ward	Portchester East	Size	2.39 Ha
Market Segment	B2, B8 and sui generis		
Description of Site and Location:	<p>2,953 sq m This site comprises a mix of uses and is located at the end of Cranleigh Road on Wicor Lake in Porchester. The Lake Works is a mix of large corrugated sheds and small converted stables to form a mix of employment uses. The Yard is mainly an open storage paved area and Wicor Farm is a previous farm building in poor repair which is currently vacant.</p>		
Market Attractiveness Criteria			
1.1: Has the site been formally identified for employment for at least 10 years?			Yes
1.2: Has there been any recent development activity, within the last 5 years?			No
1.3: Is the site being actively marketed as an employment site?			Yes
1.4: Is the site owned by a developer or another agency known to undertake employment development?			No
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?			Yes
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?			Yes
1.7: Is the site immediately available?			Yes
Market Appraisal	Poorly arranged site in a countryside location which is a real restriction on intensification. Site suffers from an isolated location and the poor quality of the majority of the existing buildings.		
Adjacent land use and conflicts	Countryside site, within coastal zone, adjacent to boatyard and site of nature conservation value.		
Known constraints and infrastructure requirements	The site is in a countryside location and within a coastal zone which would restrict intensification on this site.		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.			No
2.2: Is the site identified or likely to be required for a specific user or specialist use?			No
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?			No
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?			No
Strategic Planning and Access	Discharge of residential conditions.		
Recommendation	<p>Site Score E – Low. The western part of the site is predominantly vacant and given its proximity to the Wicor Recreation Ground and its isolated location the site would be worthwhile considering for alternative uses such as residential. The Lake Works is poorly configured and access and parking is challenging however it does currently offer small business units within close proximity to Wicor Marine Yacht Haven.</p>		



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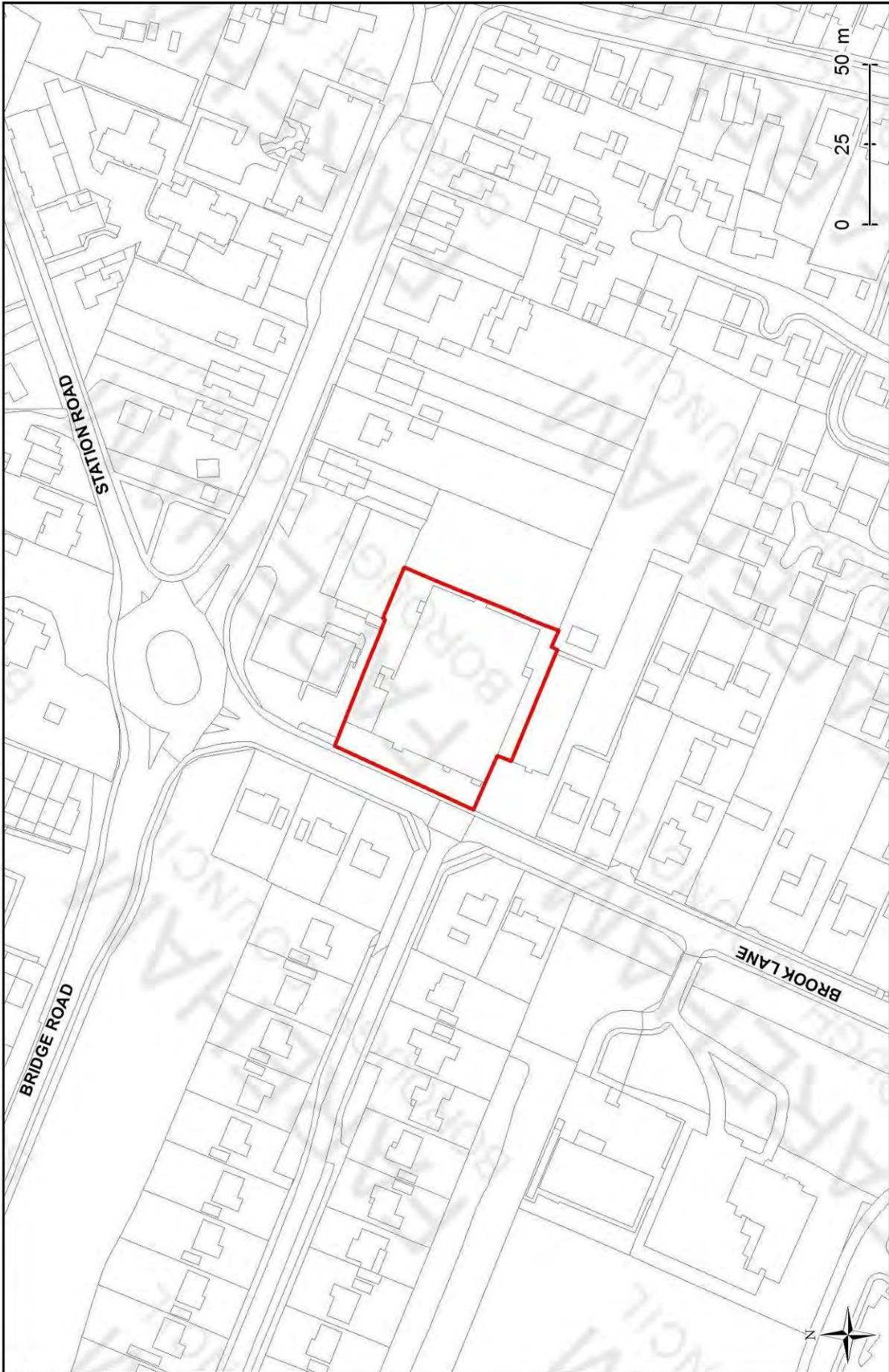
Site ID:1261 - Cranleigh Road

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FBC EMPLOYMENT LAND STUDY – 2018

Site Address Brook Lane, Park Gate			
Site Ref	1267		
Ward	Park Gate	Size	0.32 Ha
Market Segment	A1, B1, B2		
Description of Site and Location:	<p>2,960 sq m This site is located on Brook Lane, close to the roundabout where it meets the A27 and Station Road. The site comprises a large factory style building on east side of Brook Lane. It is a single large building split into smaller units. The building is single storey with multiple pitched roof and adequate parking to front.</p>		
Market Attractiveness Criteria			
1.1: Has the site been formally identified for employment for at least 10 years?			Yes
1.2: Has there been any recent development activity, within the last 5 years?			No
1.3: Is the site being actively marketed as an employment site?			Yes
1.4: Is the site owned by a developer or another agency known to undertake employment development?			No
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?			No
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?			Yes
1.7: Is the site immediately available?			Yes
Market Appraisal	<p>Site is located to the south of Park Gate Local Centre and thus benefits from good local amenities. The A27 is easily accessible although it can be congested at peak times. The existing building is relatively run down and lacks environmental quality. Long term vacancies point to a lack of market interest.</p>		
Adjacent land use and conflicts	<p>The site is located in an urban area and is surrounded by residential on all sides.</p>		
Known constraints and infrastructure requirements	<p>The site is within close proximity to residential.</p>		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.			No
2.2: Is the site identified or likely to be required for a specific user or specialist use?			No
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?			No
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?			No
Strategic Planning and Access	<p>No relevant planning history.</p>		
Recommendation	<p>Site Score D – Below Average. The site could be suitable for a small unit employment scheme, however due to its location and its proximity to residential it may be more suitable to consider alternative uses such as residential.</p>		



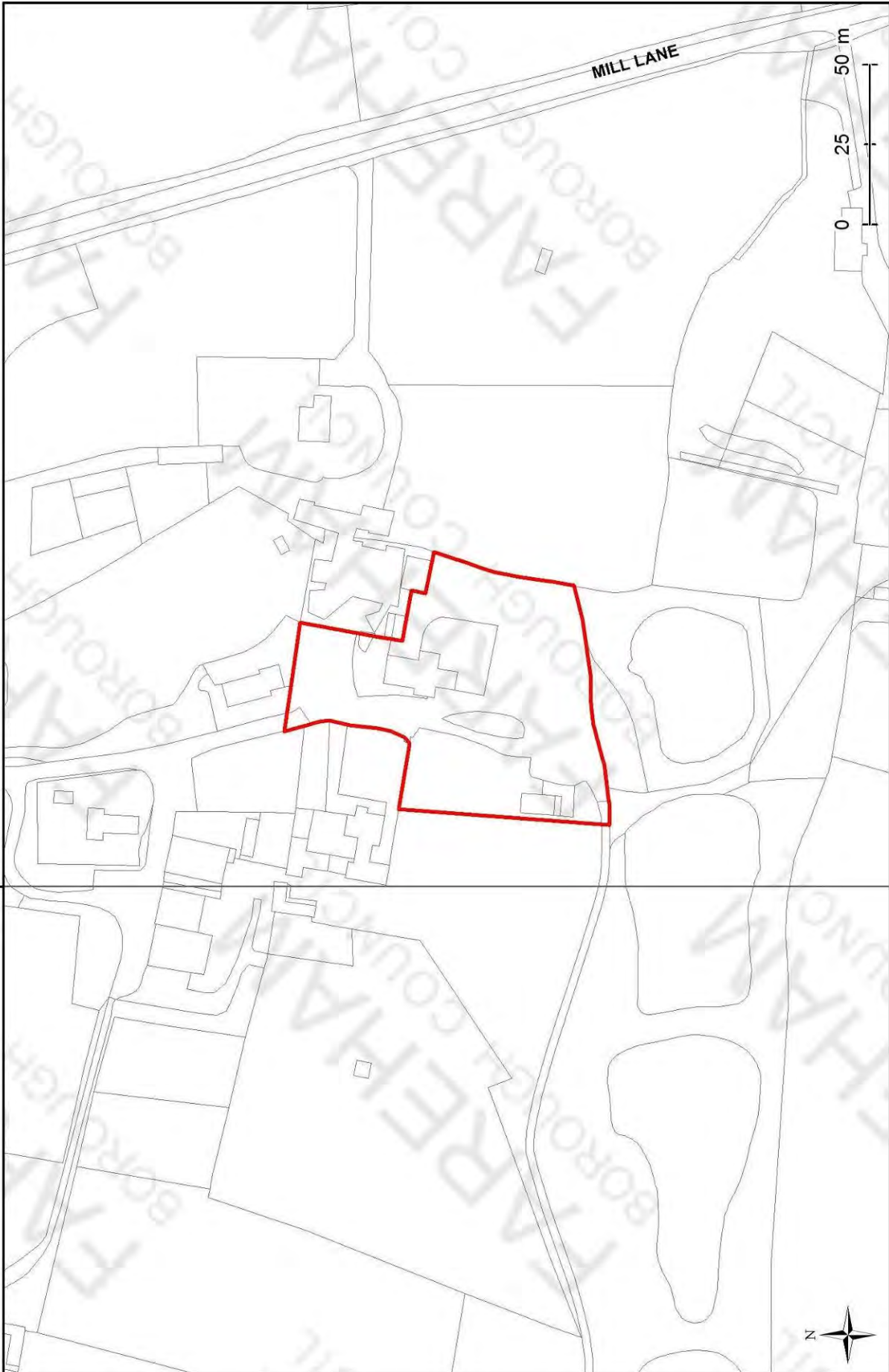
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Site ID:1267 - Brook Lane

FBC EMPLOYMENT LAND STUDY – 2018

Site Address Carron Row Farm			
Site Ref	1274		
Ward	Titchfield	Size	0.55 Ha
Market Segment	B1c		
Description of Site and Location:	<p>572 sq m of buildings Carron Row Farm is accessed from a single lane track off Segensworth Road in Titchfield. The site comprises former farm buildings associated with Carron Row Farm and includes a historic two storey farm building converted for business use with surrounding landscaping. Much of the land has been turned into parking spaces. Associated buildings have also been turned into business space.</p>		
Market Attractiveness Criteria			
1.1: Has the site been formally identified for employment for at least 10 years?			No
1.2: Has there been any recent development activity, within the last 5 years?			No
1.3: Is the site being actively marketed as an employment site?			No
1.4: Is the site owned by a developer or another agency known to undertake employment development?			No
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?			No
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?			No
1.7: Is the site immediately available?			No
Market Appraisal	<p>The site suffers from a poor layout and very poor prominence being tucked away from the main road. The existing buildings are of reasonable quality.</p>		
Adjacent land use and conflicts	<p>The Farm is a countryside site, within a Strategic Gap and partly within Titchfield Abbey conservation area. The site is located adjacent to a caravan park and Fareham Model Engineering Society site.</p>		
Known constraints and infrastructure requirements	<p>Its position within conservation area means future intensification is unlikely and its access is restricted.</p>		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.			No
2.2: Is the site identified or likely to be required for a specific user or specialist use?			No
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?			No
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?			No
Strategic Planning and Access	<p>Various change of use applications.</p>		
Recommendation	<p>Site Score E – Low. Carron Row Farm is a countryside site with restricted access and is currently predominantly used for parking in addition to a historic farm building which currently appears unused. Given its location and its poor access provision we would recommend alternative uses are considered for this site.</p>		



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Site ID: 1274 - Carron Row Farm

454000

FBC EMPLOYMENT LAND STUDY – 2018

Site Address St Margaret's Lane, Titchfield			
Site Ref	1275		
Ward	Titchfield	Size	0.44 Ha
Market Segment	B2, B8, A1		
Description of Site and Location:	<p>4,503 sq m of buildings These sites on St Margarets Lane, comprises B2, B8 buildings on the north side of St Margarets Lane, either side of St Margarets Cottage. The site has two parts; the northern part is a large single storey brick built depot, with attached two storey associated offices, with a smaller single storey B2 unit behind. The southern part is made up of two storey pitched roof units, one of which is currently in retail use.</p>		
Market Attractiveness Criteria			
1.1: Has the site been formally identified for employment for at least 10 years?			Yes
1.2: Has there been any recent development activity, within the last 5 years?			No
1.3: Is the site being actively marketed as an employment site?			Yes
1.4: Is the site owned by a developer or another agency known to undertake employment development?			No
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?			Yes
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?			Yes
1.7: Is the site immediately available?			Yes
Market Appraisal	<p>The site is relatively isolated, and is in a countryside location which restricts intensification of uses. The layout and prominence of both parts of the site are poor, although road access is good, with quick access to the A27 available. Parts of the site have been lost to alternative uses.</p>		
Adjacent land use and conflicts	<p>Residential and countryside location.</p>		
Known constraints and infrastructure requirements	<p>Countryside location which restricts intensification of uses.</p>		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.			No
2.2: Is the site identified or likely to be required for a specific user or specialist use?			No
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?			No
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?			No
Strategic Planning and Access	<p>No relevant planning history.</p>		
Recommendation	<p>Site Score E – Low. The northern site is currently Titchfield Festival Theatre and the southern part of the site is small business units. Its countryside location and lack of prominence will restrict its market appeal and in the long term should be considered for alternative uses.</p>		



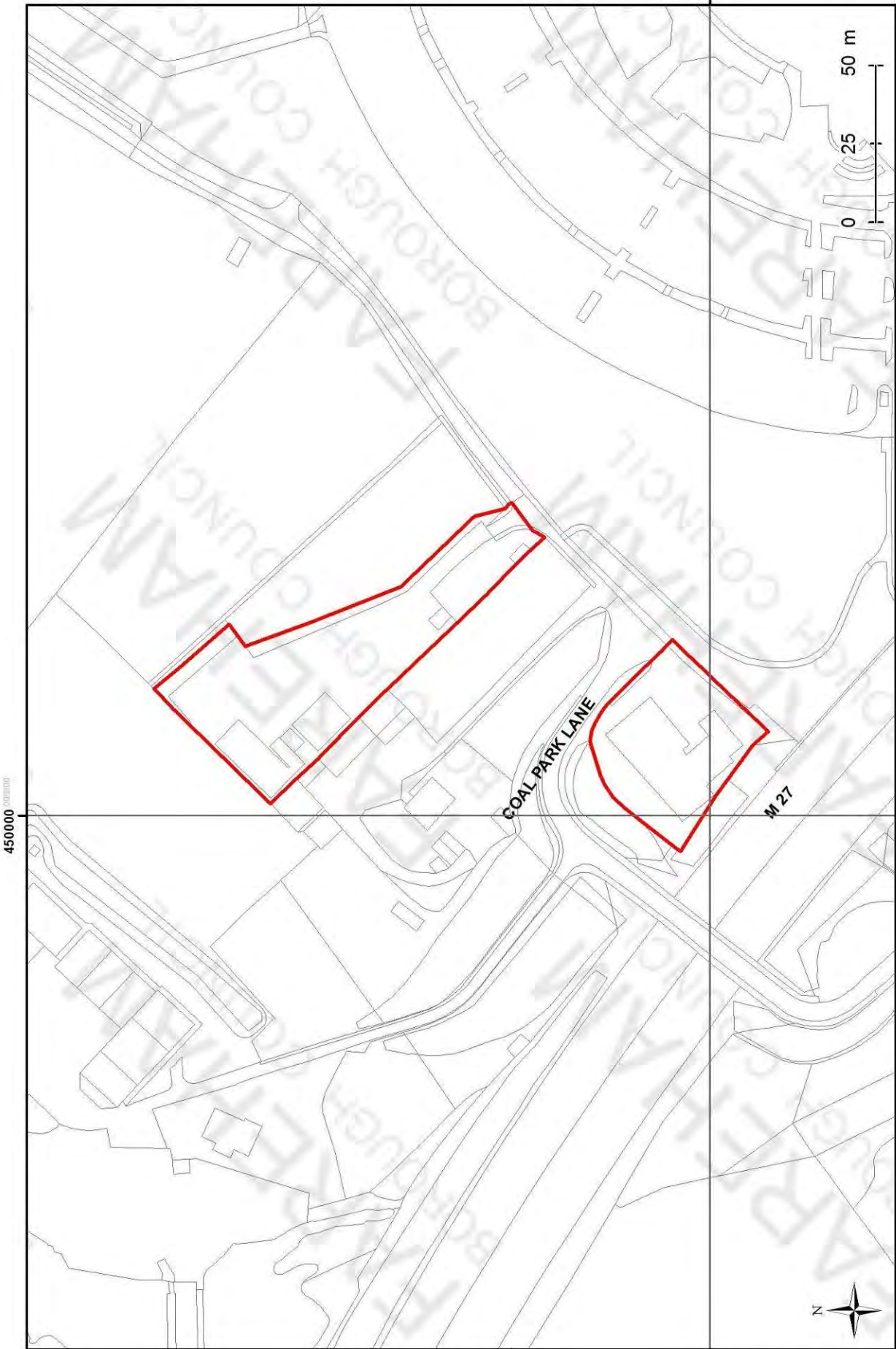
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FAREHAM
BOROUGH COUNCIL

Site ID:1275 - St Margarets Lane (North & South)

FBC EMPLOYMENT LAND STUDY – 2018

Site Address North Coal Park Lane			
Site Ref	1276		
Ward	Sarisbury	Size	0.6 Ha
Market Segment	B1-B8 use		
Description of Site and Location:	<p>1,674 sq m</p> <p>The site comprises two units let to Barncroft & Powell and Midas Revenger.</p> <p>Barncroft & Powell building is a two storey brick built structure with single storey extensions and outbuilding. The front area is paved with 2m high metallic fencing on all sides. Midas Revenger is a marine based business premises made up mainly of single storey green clad sheds.</p>		
Market Attractiveness Criteria			
1.1: Has the site been formally identified for employment for at least 10 years?			Yes
1.2: Has there been any recent development activity, within the last 5 years?			No
1.3: Is the site being actively marketed as an employment site?			Yes
1.4: Is the site owned by a developer or another agency known to undertake employment development?			No
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?			Yes
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?			Yes
1.7: Is the site immediately available?			Yes
Market Appraisal	<p>The site has no neighbour issues and the buildings are of reasonable B2/B8 quality; however the site is remote from the urban area and is difficult to access via narrow bridges over the railway and motorway, so it may be more suitable for alternative uses in the long term.</p>		
Adjacent land use and conflicts	<p>Countryside site in area of special landscape character. Adjacent to nature reserve.</p>		
Known constraints and infrastructure requirements	<p>The sites location outside of the urban area means expansion and/or intensification would not be supported.</p>		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.			No
2.2: Is the site identified or likely to be required for a specific user or specialist use?			No
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?			No
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?			No
Strategic Planning and Access	<p>No relevant planning history.</p>		
Recommendation	<p>Site Score E – Low. Whilst the sites suffer from access restrictions, the buildings are of reasonable quality and have no neighbour issues; therefore the sites are currently likely to be retained for employment uses. There is space for further intensification however as it is outside the urban area, it may not be feasible. The site offers redevelopment prospects in the medium to long term.</p>		



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FAREHAM
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Site ID:1276 - North Coal Park Lane

FBC EMPLOYMENT LAND STUDY – 2018

Site Address Great Brook			
Site Ref	1280		
Ward	Warsash	Size	1.09 Ha
Market Segment	B2, B8		
Description of Site and Location:	3,133 sq m This site includes former nursery buildings at Great Brook and comprises low intensive industrial uses in single storey former nursery buildings. Great Brook is set within landscaped areas and serviced by thin network of access roads. Part of site has yet to be converted.		
Market Attractiveness Criteria			
1.1: Has the site been formally identified for employment for at least 10 years?			Yes
1.2: Has there been any recent development activity, within the last 5 years?			No
1.3: Is the site being actively marketed as an employment site?			No
1.4: Is the site owned by a developer or another agency known to undertake employment development?			No
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?			No
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?			Yes
1.7: Is the site immediately available?			No
Market Appraisal	The site is a good distance from local amenities and poorly served by public transport. The existing nursery buildings are of reasonable quality and have been converted well. Road access is an issue given tight access into site off of Brook Lane. The site does serve local businesses but is not considered suitable for expansion or intensification due to countryside location.		
Adjacent land use and conflicts	Countryside site within local gap and adjacent to area of special landscape character and site of importance for nature conservation.		
Known constraints and infrastructure requirements	The site is not considered suitable for expansion or intensification due to countryside location.		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.			No
2.2: Is the site identified or likely to be required for a specific user or specialist use?			Yes – nursery buildings
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?			No
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?			No
Strategic Planning and Access	No relevant planning history.		
Recommendation	Site Score E – Low. The site is in a countryside location with poor access. The site currently comprises a number of nursery buildings that are of reasonable quality. In the long term this site may be considered for alternative uses.		



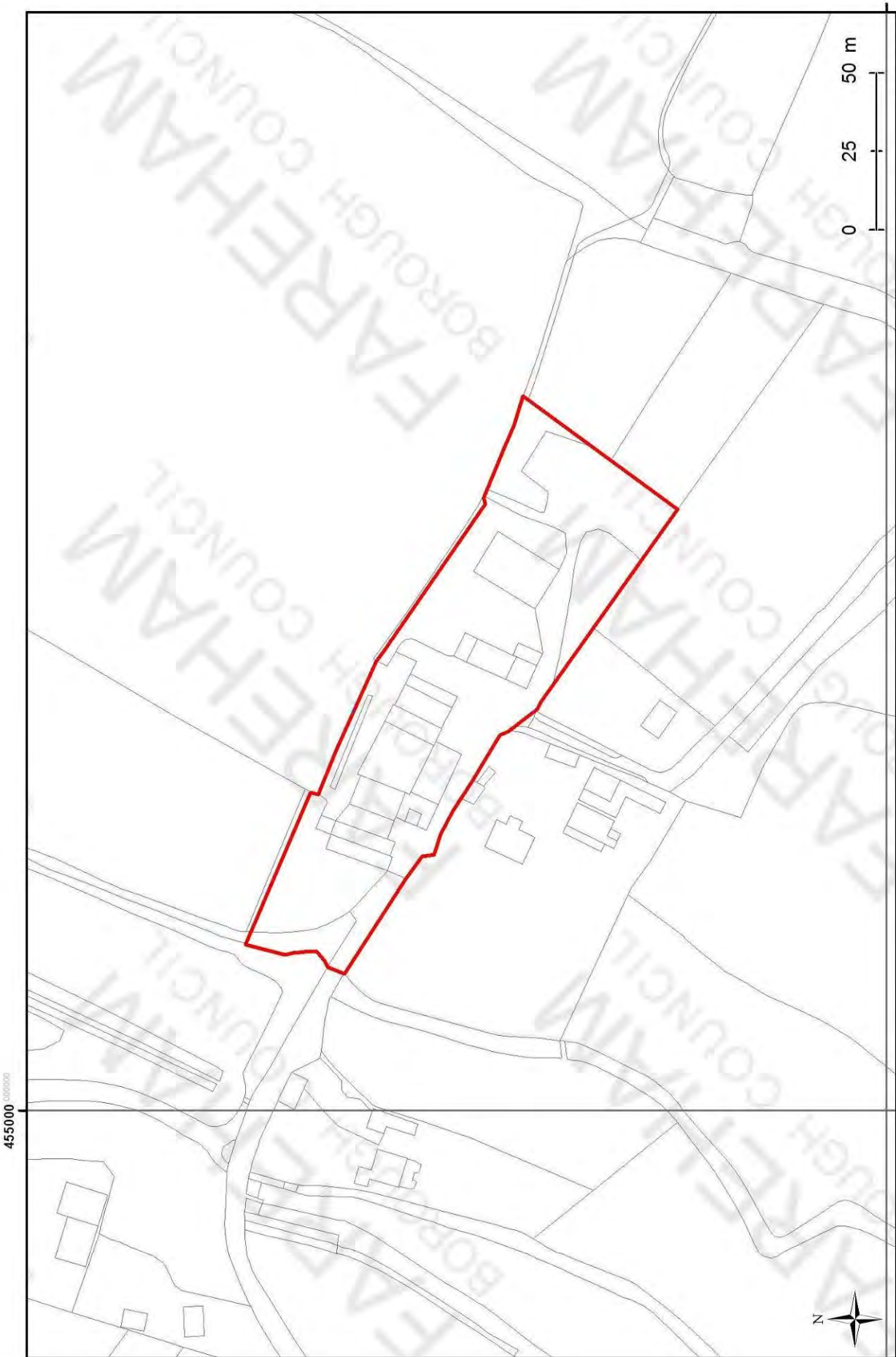
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Site ID:1280 - Great Brook

FBC EMPLOYMENT LAND STUDY – 2018

Site Address Fontley Farm House (Ironmill Lane)			
Site Ref	1281		
Ward	Fareham North	Size	0.86 Ha
Market Segment	B8		
Description of Site and Location:	<p>1,443 sq m Fontley Farm is situated in Funtley on Ironmill Lane which links to Fontley Road and Titchfield Lane. The site includes disused farm buildings and purpose built sheds adjacent to Fontley Farm House. It comprises a mixture of converted agricultural buildings and purpose built B8 sheds. Access is provided down very narrow private road; Iron Mill Lane.</p>		
Market Attractiveness Criteria			
1.1: Has the site been formally identified for employment for at least 10 years?			No
1.2: Has there been any recent development activity, within the last 5 years?			No
1.3: Is the site being actively marketed as an employment site?			No
1.4: Is the site owned by a developer or another agency known to undertake employment development?			No
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?			No
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?			No
1.7: Is the site immediately available?			No
Market Appraisal	Site has a severe access problem due to narrow private road being the only way in and out of the site. The site has no public transport links and is not in a prominent position. Converted buildings are of reasonable quality.		
Adjacent land use and conflicts	Countryside site only just within Borough boundary. Within strategic gap and area of special landscape character.		
Known constraints and infrastructure requirements	The site is constrained by poor access down a single track private road.		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.			No
2.2: Is the site identified or likely to be required for a specific user or specialist use?			No
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?			No
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?			No
Strategic Planning and Access	No relevant planning history.		
Recommendation	Site Score E – Low. Fontley Farm is a countryside site that is surrounded by fields. The access is constrained and visibility is poor. This site is not recommended for protection and may be suitable for alternative uses.		



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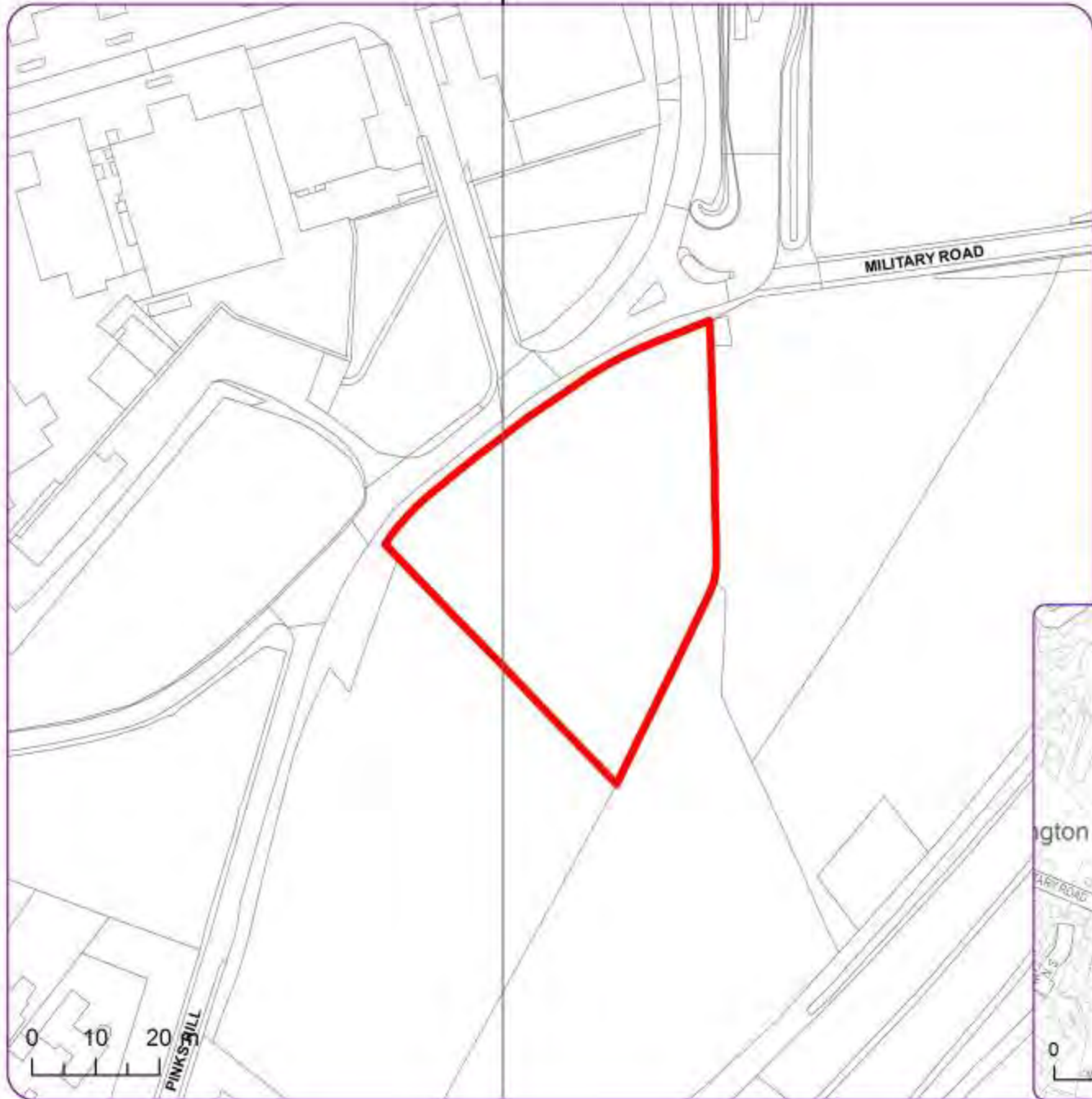
Site ID:1281 - Fontley Farm House

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FBC EMPLOYMENT LAND STUDY – 2018

Site Address Land at Pinks Hill			
Site Ref	1352		
Ward	Fareham East	Size	0.7 Ha
Market Segment	Suited to B8 open storage		
Description of Site and Location:	<p>Land at Pinks Hill is an open grazing paddock sitting at the top of the exposed knoll near to the historic Fort Wallington. The presence of large-scale industrial/ commercial buildings and infrastructure with associated parking (albeit mostly hidden behind the walls of Fort Wallington) gives this area a urban fringe character. As such the landscape resource is judged to be fairly low.</p>		
Market Attractiveness Criteria			
1.1: Has the site been formally identified for employment for at least 10 years?	No		
1.2: Has there been any recent development activity, within the last 5 years?	No		
1.3: Is the site being actively marketed as an employment site?	No		
1.4: Is the site owned by a developer or another agency known to undertake employment development?	No		
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?	No		
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?	No		
1.7: Is the site immediately available?	No		
Market Appraisal	<p>This site is considered suitable for employment uses (B2 or B8) as it is located in a low landscape sensitivity area, in close proximity to Fort Wallington Industrial Estate. Sufficient buffering will need to be considered to the neighbouring development proposed under Site 3013.</p>		
Adjacent land use and conflicts	<p>Pinks Hill / Military Road lies to the north-west / north, beyond which is North Wallington Industrial Estate and Wallington Recycling and Transfer Station. There is an open paddock to east, south and west.</p> <p>Adjoining land to the east, south and west is being promoted for residential development therefore employment uses on this site would not be compatible with adjoining residential.</p>		
Known constraints and infrastructure requirements	<p>Given the pressure for development in this area and the restricted access to the A27 and Fareham, a highways master planning exercise is required for the Fort Wallington area. Measures would need to be put in place to limit additional commercial vehicle activity on Pinks Hill.</p> <p>The site is likely to have a reptile population and possibly support foraging of Brent Geese & Wader birds. The site is also likely to support invertebrate community. The boundary features should be strengthened and buffered.</p>		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.	No		
2.2: Is the site identified or likely to be required for a specific user or specialist use?	No		
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?	No		
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?	No		
Strategic Planning and Access	No relevant planning history.		
Recommendation	<p>Site Score C - Average. This site would appear to be suitable for commercial development with access created from Military Road, clear of the junction with Fort Wallington.</p>		

459000



FAREHAM
BOROUGH COUNCIL

SITE ID 1352

LAND AT PINKS HILL, FAREHAM



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0 10 20

PINK'S HILL



ington

MILITARY ROAD

0

205

410 m

FBC EMPLOYMENT LAND STUDY – 2018

Site Address Land Adjoining Waste Transfer Station			
Site Ref	1365		
Ward	Fareham East	Size	1.05 Ha
Market Segment	Suited to B2 and B8 uses		
Description of Site and Location:	<p>The site comprises open pasture sitting at the top of the exposed knoll near to the historic Fort Wallington. The presence of large-scale industrial/ commercial buildings and infrastructure with associated parking (albeit mostly hidden behind the walls of Fort Wallington) gives this area a urban fringe feel. As such the landscape resource is judged to be fairly low.</p>		
Market Attractiveness Criteria			
1.1: Has the site been formally identified for employment for at least 10 years?			No
1.2: Has there been any recent development activity, within the last 5 years?			No
1.3: Is the site being actively marketed as an employment site?			No
1.4: Is the site owned by a developer or another agency known to undertake employment development?			No
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?			Yes
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?			No
1.7: Is the site immediately available?			No
Market Appraisal	<p>The site is considered suitable for B2 or B8 uses and should be developed in concert with site 3034 due to its location in a low landscape sensitivity area, in close proximity to motorway links and near to Fort Wallington Industrial estate. The site could be accessed via the entrance to the adjacent Waste Transfer Station subject to necessary land. It could also provide the opportunity for a comprehensive development with site ID 3034 to the east.</p>		
Adjacent land use and conflicts	<p>There is a Waste Transfer Station to north, grazing paddocks to east and south, Standard Way to west. Grassland parcels offer habitat areas, whilst run off from slope should avoid impact to Wallington River.</p>		
Known constraints and infrastructure requirements	<p>Given the pressure for development in this area and the restricted access to the A27 and Fareham, a highways master planning exercise is required for the Fort Wallington area. Measures would need to be put in place to limit additional commercial vehicle activity on Pinks Hill. The site is likely to have a reptile population and may support invertebrates and the potential for bats, badgers and dormouse.</p>		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.			No
2.2: Is the site identified or likely to be required for a specific user or specialist use?			No
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?			No
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?			No
Strategic Planning and Access	No relevant planning history.		
Recommendation	<p>Site Score C - Average. This site would appear to be suitable for commercial development with access created from Military Road, clear of the junction with Fort Wallington. This site could provide the opportunity for a comprehensive development with site ID 3034 to the east.</p>		

459000

107000

STANDARD WAY

MILITARY ROAD

0 20 40 m

FAREHAM
BOROUGH COUNCIL

SITE ID 1365

**LAND ADJOINING FORT
WALLINGTON INDUSTRIAL
ESTATE**



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FBC EMPLOYMENT LAND STUDY – 2018

Site Address South of Solent Way, Whiteley			
Site Ref	1628		
Ward	Sarisbury	Size	0.614 Ha
Market Segment	B2/B8		
Description of Site and Location:	<p>1,678 sq m</p> <p>The site is located at the southernmost section of the wider Solent Way development which is mostly within Winchester District's boundary. The site is located in close proximity to the M27 (via junction 9) and has easy access for HGV's.</p> <p>The site comprises 4 industrial sheds as part of the wider Solent Way development. The units are high quality B2/B8 facilities which have been completed within the last 5 years.</p> <p>The site was previously part of the wider Solent 2 allocation within the urban area.</p>		
Market Attractiveness Criteria			
1.1: Has the site been formally identified for employment for at least 10 years?	Yes		
1.2: Has there been any recent development activity, within the last 5 years?	Yes		
1.3: Is the site being actively marketed as an employment site?	Yes		
1.4: Is the site owned by a developer or another agency known to undertake employment development?	Yes		
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?	No		
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?	Yes		
1.7: Is the site immediately available?	Yes		
Market Appraisal	The site comprises 4 modern business sheds with surface parking to the front. There is little prospect of expansion of intensification within the boundaries of this site, although the neighbouring Solent 2 site has been considered for office development (site 1627).		
Adjacent land use and conflicts	Solent and Fulcrum industrial developments are to the north of the site and the M27 lies to the South of the site. Solent 2 (124) is to the west of the site.		
Known constraints and infrastructure requirements	No known constraints.		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.	No		
2.2: Is the site identified or likely to be required for a specific user or specialist use?	No		
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?	No		
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?	No		
Strategic Planning and Access	Erection of Lidl foodstore (Use Class A1) with customer car park and associated landscaping – 2017 (from Winchester City Council Planning site)		
Recommendation	Site Score A – High. The site offers quality B2/B8 units which are part of a wider employment development with excellent proximity to the M27 and easy access for HGV's.		



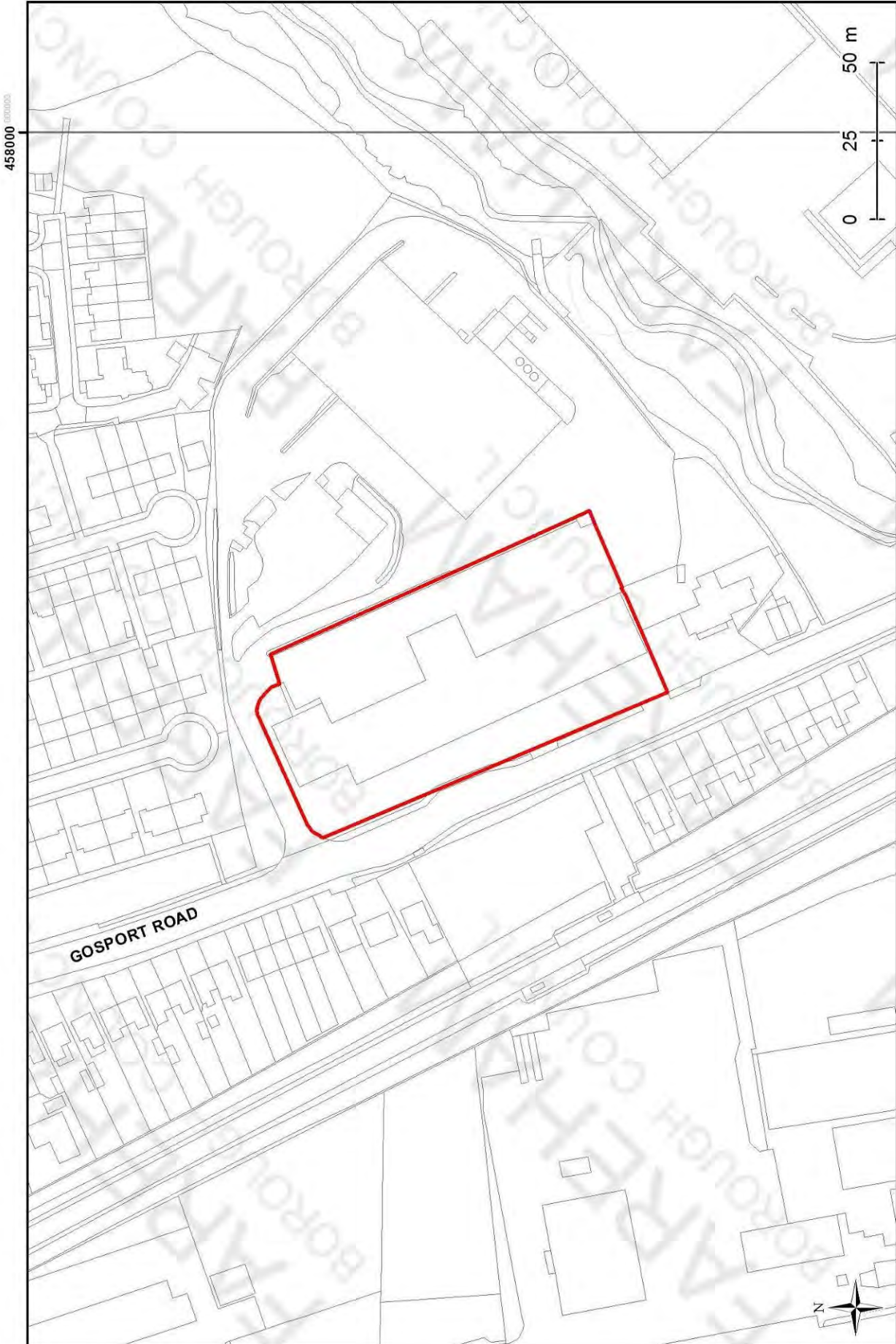
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Site ID:1628 - South of Solent Way, Whiteley

FBC EMPLOYMENT LAND STUDY – 2018

Site Address 242-248 Gosport Road			
Site Ref	1700		
Ward	Fareham East	Size	0.744 Ha
Market Segment	B2/B8, sui-generis, retail		
Description of Site and Location:	<p>2,781 sq m The site consists of a terraced row of units along Gosport Road, with access, servicing and parking to the rear via single access point to the north. The rear of the units is universally concrete, but the area fronting Gosport Road is landscaped with a tree line. The buildings are medium-large in scale and are relatively modern.</p>		
Market Attractiveness Criteria			
1.1: Has the site been formally identified for employment for at least 10 years?			Yes
1.2: Has there been any recent development activity, within the last 5 years?			No
1.3: Is the site being actively marketed as an employment site?			Yes
1.4: Is the site owned by a developer or another agency known to undertake employment development?			No
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?			No
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?			Yes
1.7: Is the site immediately available?			Yes
Market Appraisal	<p>The site suffers from congestion along the busy Gosport Road and is relatively isolated away from services, although there are additional employment buildings to the south over the Borough boundary with Gosport. The buildings are of a decent standard and the site is reasonably prominent along Gosport Road. The expansion opportunities are limited.</p>		
Adjacent land use and conflicts	<p>Smaller section of category A employment area within urban area. There is residential properties to the north of the site and employment sites to the west, east and south.</p>		
Known constraints and infrastructure requirements	<p>No known constraints.</p>		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.			No
2.2: Is the site identified or likely to be required for a specific user or specialist use?			No
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?			No
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?			No
Strategic Planning and Access	<p>No relevant planning history.</p>		
Recommendation	<p>Site Score C – Average. The site provides relatively modern units on the A32 adjacent to Fareham Reach. There is no further scope for expansion.</p>		



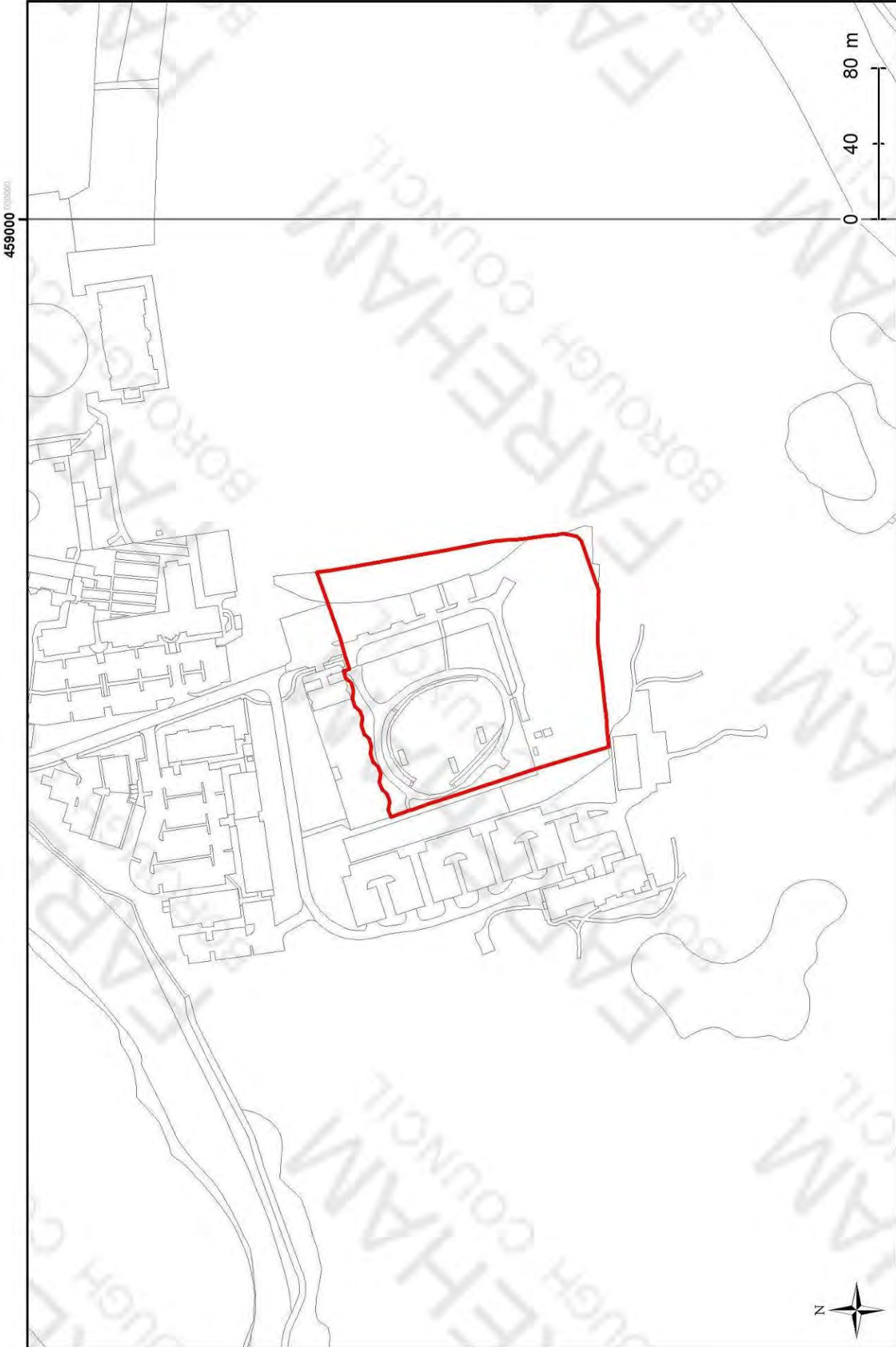
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Site ID: 1700 - 242-248 Gosport Road

FBC EMPLOYMENT LAND STUDY – 2018

Site Address Walled Garden, Cams Estate			
Site Ref	1999		
Ward	Fareham East	Size	1.66 Ha
Market Segment	B1		
Description of Site and Location:	Extant permission for 1,952 sq m of B1-B8 floor space. The site is currently an open garden set within high walls, which was originally part of wider Cams Estate. The business park is a large, high quality office location, part built part converted outbuildings of country house. It is set within a landscaped conservation area. The surrounding office buildings are a mix of materials but all are designed to fit within conservation area.		
Market Attractiveness Criteria			
1.1: Has the site been formally identified for employment for at least 10 years?			Yes
1.2: Has there been any recent development activity, within the last 5 years?			No
1.3: Is the site being actively marketed as an employment site?			No
1.4: Is the site owned by a developer or another agency known to undertake employment development?			Yes
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?			No
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?			Yes
1.7: Is the site immediately available?			Yes
Market Appraisal	The site is located within a wider employment site (Site 165) and therefore benefits from some local amenities. The site has previous permission for offices and is therefore considered suitable for an allocation for this use.		
Adjacent land use and conflicts	The site comprises land within the Walled Garden at Cams Hall Part of Cams Estate conservation area. The surrounding area now utilised for economic development uses and Golf Course.		
Known constraints and infrastructure requirements	There are no environmental constraints, but the heritage assets on site means that any new development will need to well-designed in order to remain respectful to original buildings.		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.			No
2.2: Is the site identified or likely to be required for a specific user or specialist use?			No
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?			No
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?			No
Strategic Planning and Access	No relevant planning history.		
Recommendation	Site Score B – Above Average. The site is set within a high quality office park offering premium office space. Complementary office space would be suitable on this site.		



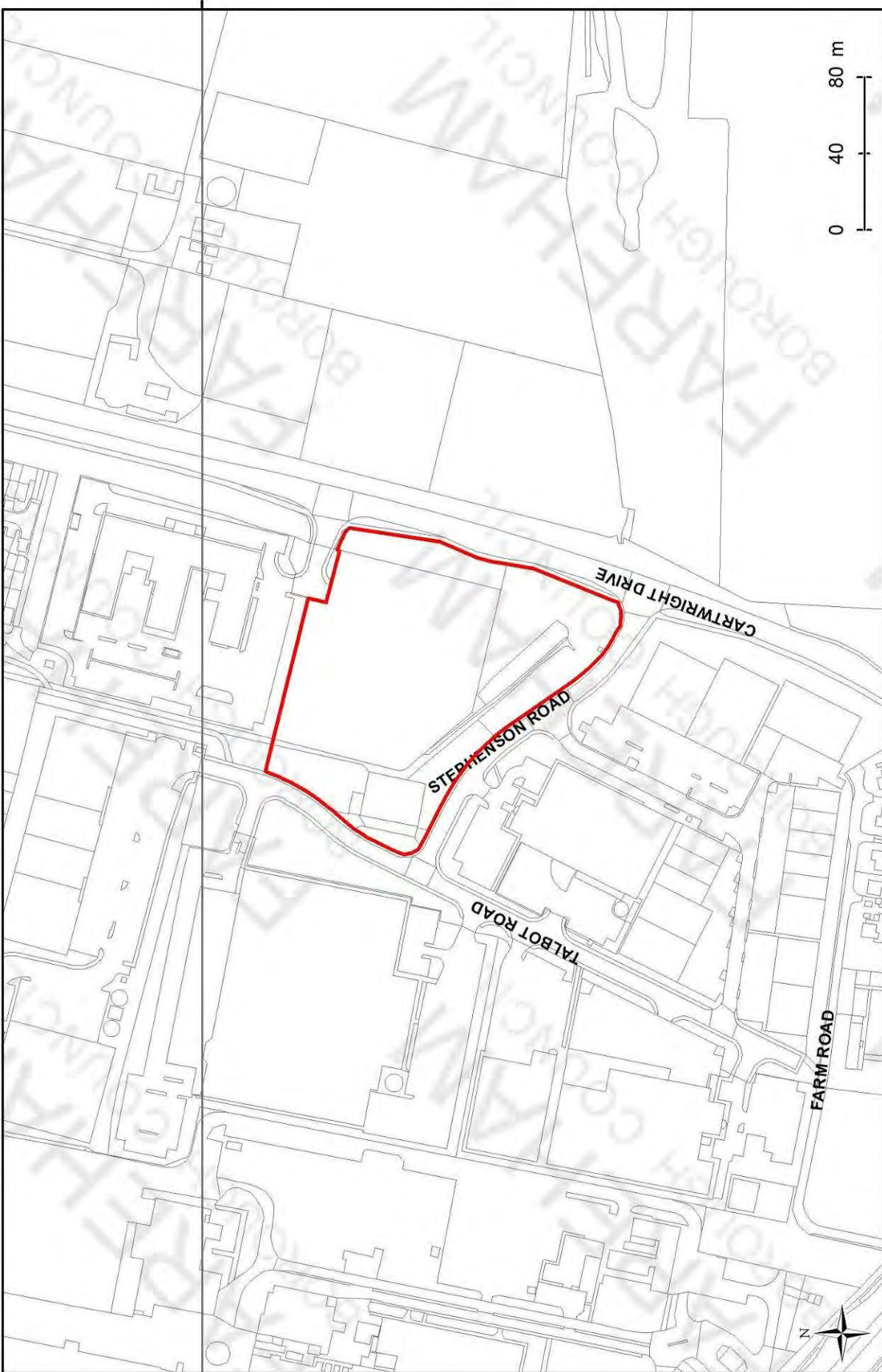
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Site ID:1999 - The Walled Garden, Cambs Hall

FBC EMPLOYMENT LAND STUDY – 2018

Site Address Midpoint 27 (J9 South), Segensworth South (Talbot Road)			
Site Ref	2001		
Ward	Titchfield	Size	1.843 Ha
Market Segment	B2/B8		
Description of Site and Location:	Original permission for 4,000 sq m unit The site comprises the remaining section of land in a larger employment site to the west of Cartwright Drive. The site is currently a large surface car park, serving the Town Centre, with easy access onto the A27 and A32 and has recently been sold on a long leasehold interest and a new 40,000 sq ft industrial unit is to be constructed on the site.		
Market Attractiveness Criteria			
1.1: Has the site been formally identified for employment for at least 10 years?			Yes
1.2: Has there been any recent development activity, within the last 5 years?			No
1.3: Is the site being actively marketed as an employment site?			Yes
1.4: Is the site owned by a developer or another agency known to undertake employment development?			Yes
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?			No
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?			Yes
1.7: Is the site immediately available?			Yes
Market Appraisal	The site is part of wider Segensworth South site (site 78) and benefits from no neighbour issues and access to reasonable employment related services. The site has easy access Cartwright Drive which links quickly to the A27 and wider strategic road network. Site has a previous permission for industrial uses and has been marketed. The site has been sold on a long leasehold interest and is being redeveloped for a new 40,000 sq ft industrial unit.		
Adjacent land use and conflicts	The site is within the Town Centre boundary.		
Known constraints and infrastructure requirements	No known constraints.		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.			No
2.2: Is the site identified or likely to be required for a specific user or specialist use?			No
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?			No
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?			No
Strategic Planning and Access	Erection of resi and business units for B1, B2, B8 use.		
Recommendation	Site Score A – High. The site is to be redeveloped for a new 40,000 sq ft unit.		



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Site ID:2001 - Midpoint 27, Cartwright Drive

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FBC EMPLOYMENT LAND STUDY – 2018

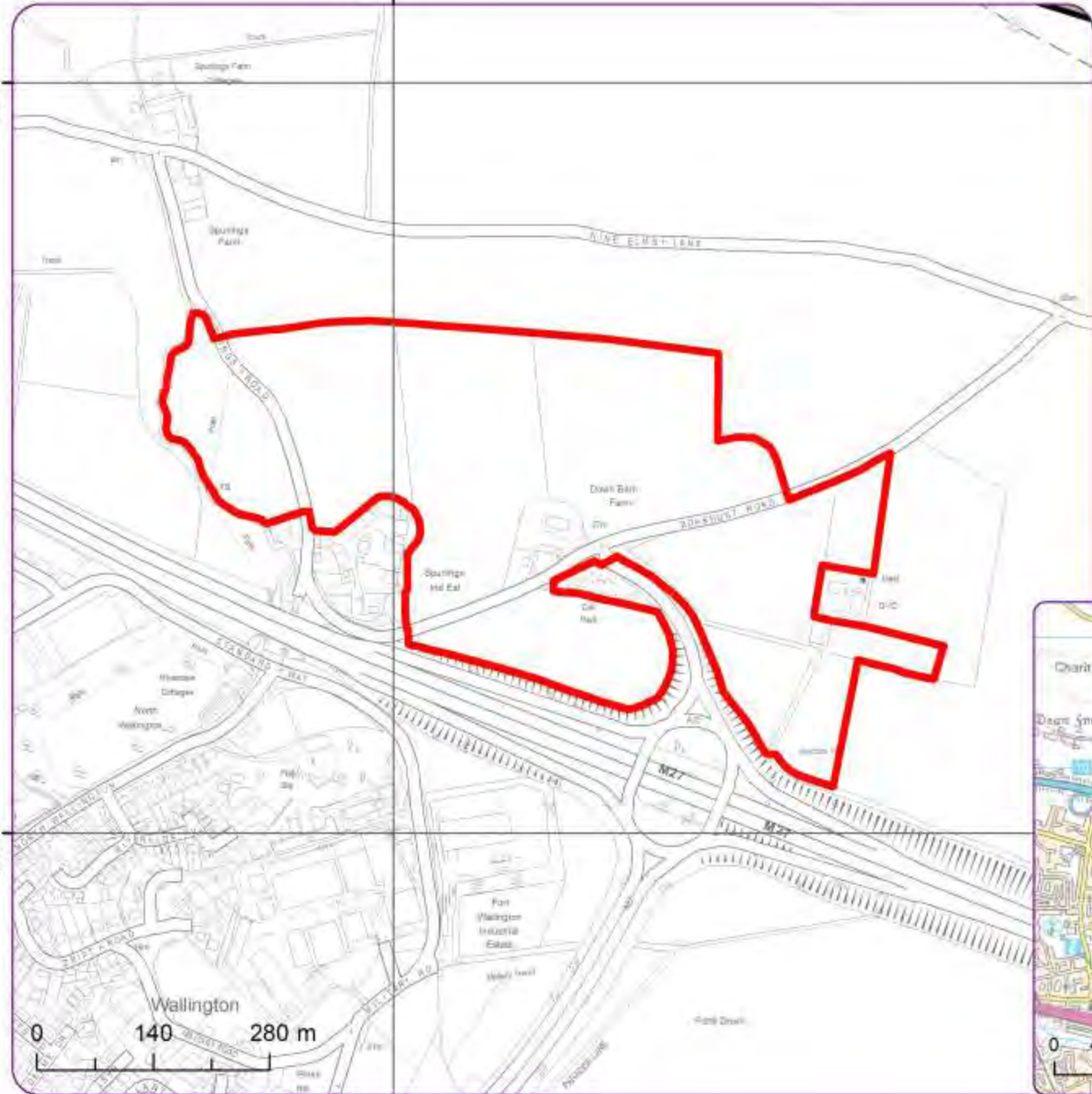
Site Address Down Barn Farm, Spurlings			
Site Ref	3011		
Ward	Fareham East	Size	32.85 Ha
Market Segment	Suited to B2 or B8 logistics and storage		
Description of Site and Location:	30,000 sq m The majority of the site is in agricultural use. It is located north of the M27 at junction 11. The landscape is judged to be of high sensitivity due to the lack of tree cover and exposed nature in this area making development difficult to integrate without unacceptable adverse effects.		
Market Attractiveness Criteria			
1.1: Has the site been formally identified for employment for at least 10 years?			No
1.2: Has there been any recent development activity, within the last 5 years?			No
1.3: Is the site being actively marketed as an employment site?			No
1.4: Is the site owned by a developer or another agency known to undertake employment development?			No
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?			No
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?			No
1.7: Is the site immediately available?			No
Market Appraisal	The high sensitivity landscape setting of this site makes proposed scale of development extremely difficult to integrate and poses viability issues. The site is recognised as being commercially attractive due to its proximity to the M27.		
Adjacent land use and conflicts	Down Barn Farm, which comprises a farmhouse, a barn and a modern barn is located in the south of the site. Spurlings Industrial Estate is located to the south-west of the site. The remainder of the site is surrounded by agricultural land.		
Known constraints and infrastructure requirements	The principle of employment development at this location is accepted with regards to highways access; however the precise location of the site access and its relationship to the existing haul road and the link to M27 J11 needs to be explored in further detail through highways modelling. The prospect of accessing the Spurlings Industrial Estate through the site should be explored. Significant highway improvement works are likely to be required.		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.			No
2.2: Is the site identified or likely to be required for a specific user or specialist use?			No
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?			No
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?			No
Strategic Planning and Access	Planning decisions of note within this site include: Land at Down Barn Farm Boarhunt Road Fareham PO17 6AJ Proposal: Generation Plant Comprising Containerised Gas Fuelled Generators, Ancillary Buildings And Security Columns Within Fenced Compound With Associated Landscaping And Earth Bund (Alternative To Approval Granted Under Reference P/16/0510/Fp & P/16/1043/Vc) Decision Date: 15/05/2018 Status: Approve Boarhunt Road – Down Barn Farm - Fareham PO17 6AJ		

	Proposal: Use For Hardcore/Concrete Recycling Solely For Graham Moyse Contractors Decision Date: 02/07/2009 Status: HCC Permission
Recommendation	Site Score D – Below Average. The site is conveniently located within close proximity to the M27 which would be commercially attractive to B1, B2 and B8 occupiers, however there are sensitivities to development due to its location and is some distance from local amenities.

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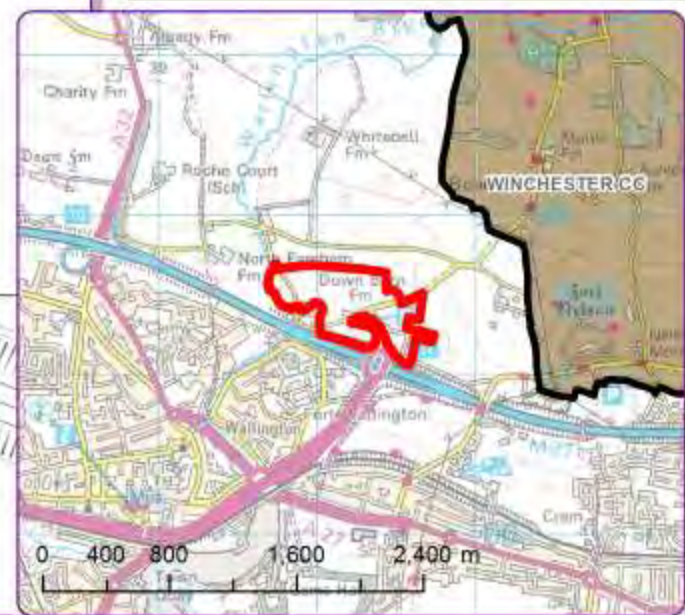
FAREHAM
BOROUGH COUNCIL

SITE ID 3011

LAND AT DOWN BARN FARM



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FBC EMPLOYMENT LAND STUDY – 2018

Site Address Land West of Newgate Lane, Peel Common			
Site Ref	3022		
Ward	Stubbington	Size	3.06 Ha
Market Segment	Suited to B2 or B8 uses		
Description of Site and Location:	10,000 sq m Site is comprised of two open paddocks, each with wooded boundaries.		
Market Attractiveness Criteria			
1.1: Has the site been formally identified for employment for at least 10 years?	No		
1.2: Has there been any recent development activity, within the last 5 years?	No		
1.3: Is the site being actively marketed as an employment site?	No		
1.4: Is the site owned by a developer or another agency known to undertake employment development?	No		
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?	No		
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?	Yes		
1.7: Is the site immediately available?	No		
Market Appraisal	The site is within strategic gap, but due to existing built infrastructure and development, development here could be integrated without impacting the integrity of the gap. The site would be suitable for employment uses given its location however there will be some local ecological issues (hedgerow dissecting the site) which will need to be taken into account which may reduce the site's capacity for development. Development should be designed within the existing structure of vegetation, to help integrate it into the landscape.		
Adjacent land use and conflicts	There is a solar farm to immediate north; Newgate Lane to east, beyond which is open arable/ grazing land. There is a gypsy & traveller site to immediate south of site and Peel Common Wastewater Treatment Works to west.		
Known constraints and infrastructure requirements	Suitable access could be achieved from Newgate Lane, which is to be by-passed by the new Newgate Lane South relief road. A loop road on-site is recommended, leading from an access located near the northern end of the frontage.		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.	No		
2.2: Is the site identified or likely to be required for a specific user or specialist use?	No		
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?	No		
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?	No		
Strategic Planning and Access	No relevant planning history.		
Recommendation	Site Score D – Below Average. The site would be suitable for employment uses given the neighbouring uses and ease of access from Newgate Lane. It is some distance from local amenities and the site would be subject to landscape restrictions limiting the scale of development.		

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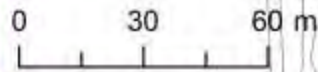
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SITE ID 3022

**LAND WEST OF NEWGATE LANE,
STUBBINGTON**



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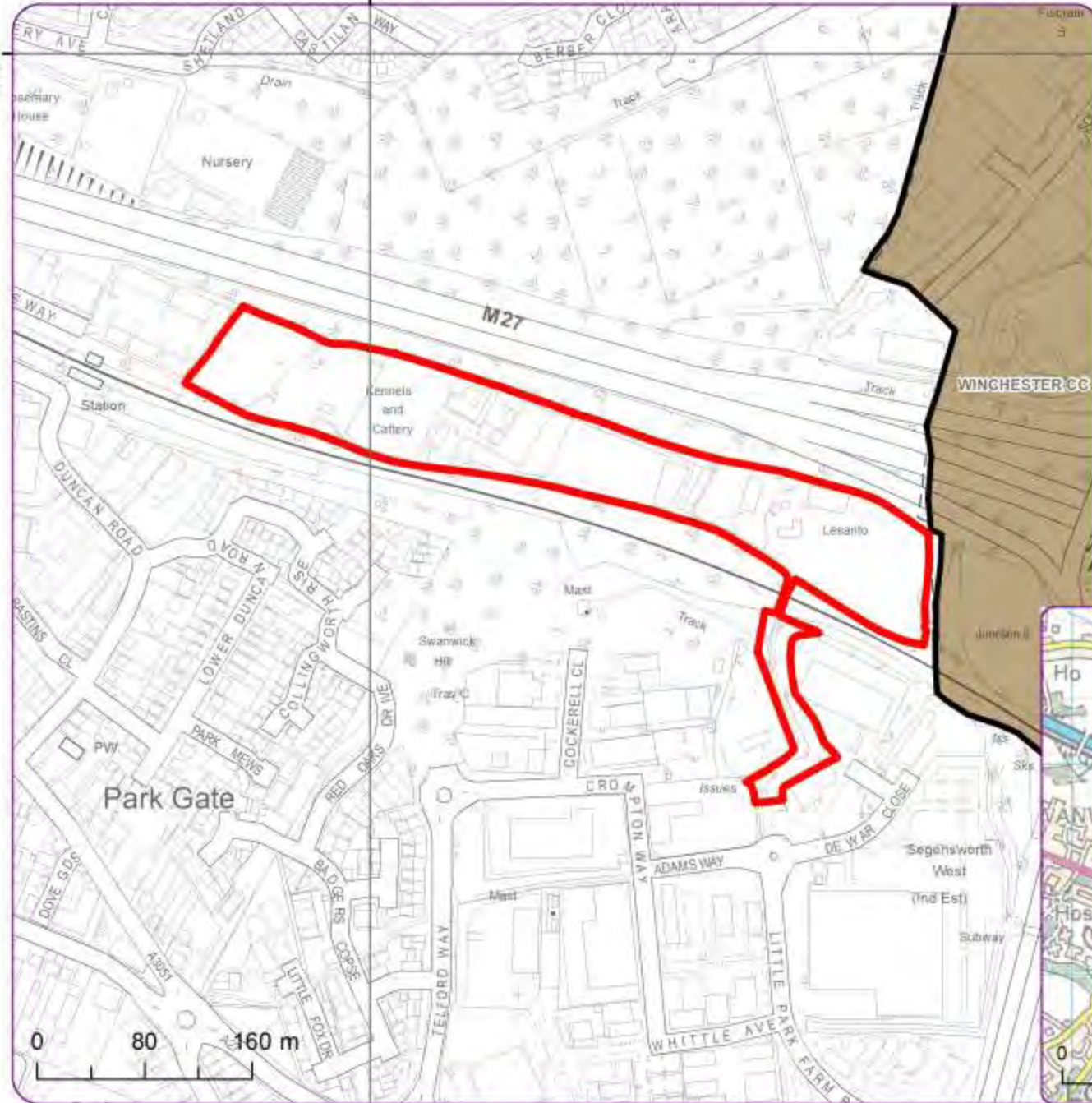


FBC EMPLOYMENT LAND STUDY – 2018

Site Address Little Park Farm			
Site Ref	3025		
Ward	Park Gate	Size	5.73 Ha
Market Segment	B1, B2, B8		
Description of Site and Location:	<p>11,200 sq m The site is located within a mixture of uses, including employment open storage, residential, kennels and amenity grazing. Site is an employment allocation within the adopted Local Plan 2015. Part of the site contains a B8 open storage use, which due to the restrictive highways access is likely to be site's main use.</p>		
Market Attractiveness Criteria			
1.1: Has the site been formally identified for employment for at least 10 years?			Yes
1.2: Has there been any recent development activity, within the last 5 years?			No
1.3: Is the site being actively marketed as an employment site?			Yes
1.4: Is the site owned by a developer or another agency known to undertake employment development?			Yes
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?			No
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?			No
1.7: Is the site immediately available?			Yes
Market Appraisal	<p>Site is an existing employment allocation within the urban area and has no neighbour constraints. However highways access constraints mean only low traffic generating uses can be achieved unless a significant highways solution can be found. The site is currently considered suitable for low intensity open storage, though highly constrained by access issues. Widening of the access would significantly improve its marketability and given its location would be a suitable employment site.</p>		
Adjacent land use and conflicts	<p>The site is located between the M27 to the north and the railway line to the south. The western boundary abuts the Chandlers Way employment area, whilst land to the east forms part of an employment allocation within Winchester district.</p>		
Known constraints and infrastructure requirements	<p>Site access is via a 3.7m wide rail underbridge, which would require control measures for vehicles and pedestrians. Traffic signals would appear to be feasible, linked to a separate pedestrian phase. There is a potential vulnerability if the underbridge became obstructed, such as by a large / high vehicle.</p>		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.			No
2.2: Is the site identified or likely to be required for a specific user or specialist use?			No
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?			No
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?			No
Strategic Planning and Access	No relevant planning history.		
Recommendation	<p>Site Score D – Below Average. The location of the site and the surrounding uses makes this site a viable employment site with further scope for development; however the access constraints are currently limiting further expansion of this site.</p>		

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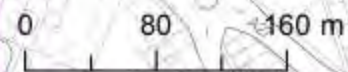
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BOROUGH COUNCIL

SITE ID 3025

LITTLE PARK FARM, PARK GATE



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FBC EMPLOYMENT LAND STUDY – 2018

Site Address Land at Peak Lane Nurseries			
Site Ref	3033		
Ward	Stubbington	Size	Ha 3.54
Market Segment			
Description of Site and Location:	<p>Indicative floor space of 15,000 sq ft The site is currently used as a horticultural nursery. The site is accessed from Peak Lane, almost opposite the junction with Mays Lane/Oakcroft Lane. A new access solution for the site and Mays Lane may however be necessary given the location and standard of the Mays Lane junction.</p>		
Market Attractiveness Criteria			
1.1: Has the site been formally identified for employment for at least 10 years?			Yes
1.2: Has there been any recent development activity, within the last 5 years?			No
1.3: Is the site being actively marketed as an employment site?			No
1.4: Is the site owned by a developer or another agency known to undertake employment development?			No
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?			No
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?			Yes
1.7: Is the site immediately available?			No
Market Appraisal	<p>The site is currently in use as an operational horticultural nursery, with extensive glasshouses and associated buildings on site. The glasshouses are prominent features of the landscape, but do not detract from the agricultural character of the area or its quality. It would be difficult to accommodate significant new development without affecting the distinctive qualities of the landscape, particularly as the views of the site are very open and expansive, particularly from vehicles travelling south along Peak Lane. Its location adjacent to the open countryside and residential properties also pose development constraints.</p>		
Adjacent land use and conflicts	<p>The site has open countryside to north, east and west of site and residential properties to south.</p>		
Known constraints and infrastructure requirements	<p>Due to the sites landscape setting would make it very difficult to accommodate the B2 or B8 employment use. Access to the site is also inhibited and is therefore considered unsustainable in transport terms for other employment uses. Bats, reptiles and badgers have potential to be on site. The buildings (not glasshouses) on site may also provide potential roosting opportunities for bats.</p>		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.			No
2.2: Is the site identified or likely to be required for a specific user or specialist use?			Yes
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?			No
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?			No
Strategic Planning and Access	No relevant planning history.		
Recommendation	Site Score E – Low. This site is not considered a suitable location for employment related uses due to its situation and access constraints.		

SITE ID 3033

**LAND AT PEAK LANE
NURSERIES, STUBBINGTON**



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FBC EMPLOYMENT LAND STUDY – 2018

Site Address Land at Military Road, rear of Waste Transfer Station, Wallington			
Site Ref	3034		
Ward	Fareham East	Size	1.23 Ha
Market Segment	Suited to B2, B8		
Description of Site and Location:	<p>The site comprises open pasture sitting at the top of the exposed knoll near to the historic Fort Wallington. The presence of large-scale industrial/ commercial buildings and infrastructure with associated parking (albeit mostly hidden behind the walls of Fort Wallington) gives this area a urban fringe feel and would represent an opportunity for an extension to an established employment area. Commercially the site would be attractive for B1,B2 or B8. Parts of the site are heavily treed with established habitats and would need to be carefully considered.</p>		
Market Attractiveness Criteria			
1.1: Has the site been formally identified for employment for at least 10 years?			No
1.2: Has there been any recent development activity, within the last 5 years?			No
1.3: Is the site being actively marketed as an employment site?			No
1.4: Is the site owned by a developer or another agency known to undertake employment development?			No
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?			No
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?			No
1.7: Is the site immediately available?			No
Market Appraisal	<p>The site is within an area of low landscape sensitivity with an overriding urban fringe character particularly given the adjoining waste transfer station. The site is enclosed on three sides by vegetation, obscuring it from view from the M27 corridor and Pinks Hill. The site has scope to accommodate some change without unacceptable adverse effects on any landscape resources, and opportunities to mitigate the effects of change by strengthening of the existing landscape framework.</p> <p>Site is considered suitable for employment uses due to its location in a low landscape sensitivity area, proximity to motorway links and proximity to Fort Wallington Industrial estate.</p>		
Adjacent land use and conflicts	<p>M27 and Junction 11 link to the north and the east of site; Military Road (and site frontage) to south; and the Waste Transfer Station and paddock (site 1365) is to west.</p>		
Known constraints and infrastructure requirements	<p>Given the pressure for development in this area and the restricted access to the A27 and Fareham, a highways master planning exercise is required for the Fort Wallington area. Measures would need to be put in place to limit additional commercial vehicle activity on Pinks Hill. Suitable improvements could be secured if the site were to come forward alongside site ID 1365. The site is likely to have a reptile population and may support invertebrates. Grassland parcels offer habitat areas, whilst run off from slope should avoid impact to Wallington River. There is also the potential for bats, badgers and dormouse.</p>		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.			No
2.2: Is the site identified or likely to be required for a specific user or specialist use?			No

2.3: Is the site part of a comprehensive or long term development or regeneration proposal?	No
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?	No
Strategic Planning and Access	No relevant planning history.
Recommendation	Site Score C - Average. This site would appear to be suitable for commercial development with access created from Military Road, clear of the junction with Fort Wallington. This site could provide the opportunity for a comprehensive development with site ID 1365 to the west.

SITE ID 3034

**LAND REAR OF WTS,
WALLINGTON**

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107000

STANDARD WAY

MILITARY ROAD

0 30 60 m



0 337.5 675 m

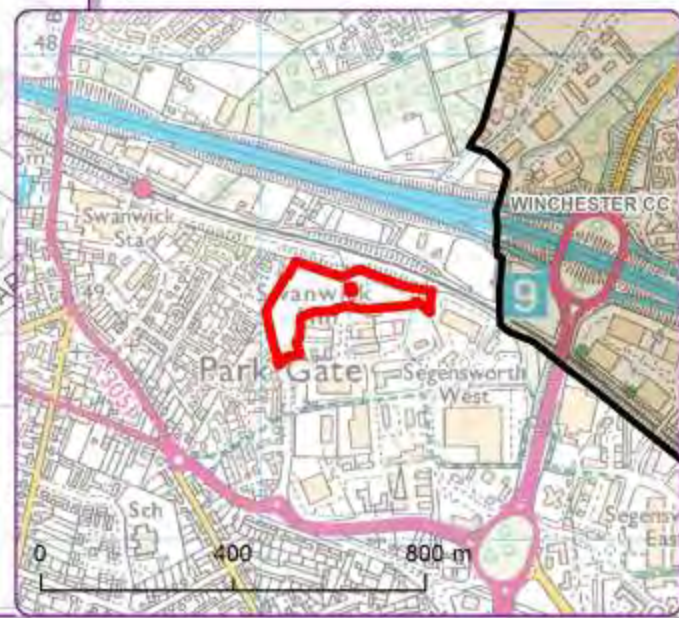
FBC EMPLOYMENT LAND STUDY – 2018

Site Address Land at Telford Way, Segensworth West			
Site Ref	3054		
Ward	Park Gate	Size	2.75 Ha
Market Segment	B1, B2, B8		
Description of Site and Location:	<p>The subject site is situated within the Segensworth West Industrial Estate which is located approximately ½ mile to the south of the M27 and 5 miles west of Fareham town centre. The estate has good access to J9 of the M27.</p> <p>The site comprises undeveloped land, in an urban area, that is not within a flood zone. The site is located predominantly within an existing employment designation.</p> <p>This large site has two possible connections to the highway. The principle access would be from the Telford Way/ Crompton Way roundabout in the south of the site.</p>		
Market Attractiveness Criteria			
1.1: Has the site been formally identified for employment for at least 10 years?			No
1.2: Has there been any recent development activity, within the last 5 years?			No
1.3: Is the site being actively marketed as an employment site?			No
1.4: Is the site owned by a developer or another agency known to undertake employment development?			No
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?			No
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?			Yes
1.7: Is the site immediately available?			No
Market Appraisal	<p>This site would represent an extension to an established employment area and would be commercially attractive for B1, B2 or B8 uses. Parts of the site are heavily treed with established habitats and would need to be carefully considered.</p>		
Adjacent land use and conflicts	<p>The site is situated with a railway to north; Segensworth West industrial and office area to east and south; residential dwellings to west.</p>		
Known constraints and infrastructure requirements	<p>The priority habitat woodland and scrub habitats on the site are likely to be used by dormice, reptiles, butterflies, invertebrates and bats.</p>		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.			No
2.2: Is the site identified or likely to be required for a specific user or specialist use?			No
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?			No
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?			No
Strategic Planning and Access	<p>No relevant planning history.</p>		
Recommendation	<p>Site Score C – Average. The site is located within an established employment area within the Segensworth West Industrial Estate. Whilst careful consideration needs to be made for the existing habitat the site would be commercially attractive for B1, B2 or B8 uses given its proximity to the M27.</p>		

SITE ID 3054

**LAND AT SEGENSWORTH WEST,
FAREHAM**

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FBC EMPLOYMENT LAND STUDY – 2018

Site Address Daedalus East (Faraday Business Park), Stubbington			
Site Ref	3113		
Ward	Stubbington	Size	44.25 Ha
Market Segment	B1 & B2		
Description of Site and Location:	<p>Faraday Business Park is located between Southampton and Portsmouth, west of Portsmouth Harbour on the South Coast. The Enterprise Zone connects to the motorway network at Junction 11 of M27 and the link road is being upgraded by an £8m improvement scheme, providing excellent connections to Southampton, Portsmouth and the M3 to London.</p> <p>Outline planning permission was granted in 2011 for up to 28,000 sq m of employment floorspace at Daedalus East. A range of serviced non-airside plots are available at Faraday Business Park, which are currently being marketed. The park is open to a variety of occupiers and benefits from the Solent Enterprise Zone. This employment area benefits from aircraft taxiways and airport infield.</p>		
Market Attractiveness Criteria			
1.1: Has the site been formally identified for employment for at least 10 years?			Yes
1.2: Has there been any recent development activity, within the last 5 years?			Yes
1.3: Is the site being actively marketed as an employment site?			Yes
1.4: Is the site owned by a developer or another agency known to undertake employment development?			Yes
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?			No
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?			Yes
1.7: Is the site immediately available?			Yes
Market Appraisal	<p>The site represents an extension and intensification to an established and permitted employment area. Site has upgraded access from Broom Way and will benefit from Stubbington Bypass and Newgate Lane South road schemes and provides quality employment space for advanced manufacturing, marine and aviation occupiers.</p>		
Adjacent land use and conflicts	<p>The site has public open space to north; Broom Way and undeveloped countryside to east; Lee-on-the-Solent to the south; Airport infield and main runway to west.</p>		
Known constraints and infrastructure requirements	<p>The site has limited constraints and benefits from improvements to the strategic road network.</p>		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.			Yes
2.2: Is the site identified or likely to be required for a specific user or specialist use?			Yes
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?			Yes
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?			Yes
Strategic Planning and Access	<p>The site has outline permission granted in 2011 for up to 28,000 sq m of employment floorspace at Daedalus East.</p>		

Recommendation	Site Score A – High. The site is currently being marketed and provides design and build opportunities for B1, B2 and B8 occupiers within advanced manufacturing, marine and aviation industries. It benefits from its unique location on an operating airfield and its access has been significantly improved following works to the strategic road network.
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BOROUGH COUNCIL

SITE ID 3113

**FARADAY BUSINESS PARK,
DAEDALUS EAST**



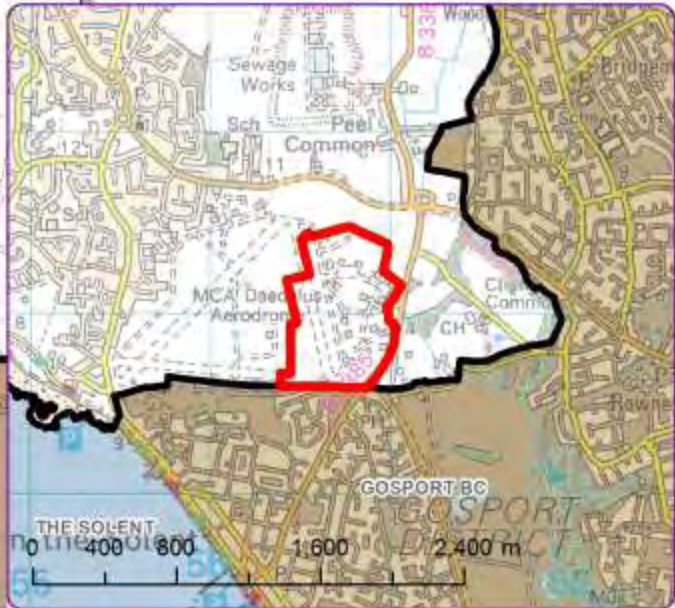
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Airfield

nt Airport at Daedalus

GOSPORT BC

0 125 250 m



FBC EMPLOYMENT LAND STUDY – 2018

Site Address Daedalus West (Swordfish Business Park), Stubbington			
Site Ref	3114		
Ward	Stubbington	Size	16.47 Ha
Market Segment	B1 & B2		
Description of Site and Location:	<p>Swordfish Business Park is located between Southampton and Portsmouth, west of Portsmouth Harbour on the South Coast. The Enterprise Zone connects to the motorway network at Junction 11 of M27 and the link road is being upgraded by an £8m improvement scheme, providing excellent connections to Southampton, Portsmouth and the M3 to London.</p> <p>Outline permission was granted in 2011 for up to 22,000 sq m of employment floorspace at Daedalus West. This site will provide design and build opportunities for B1, B2 and B8 occupiers within the aviation industry with access to an operating airfield.</p>		
Market Attractiveness Criteria			
1.1: Has the site been formally identified for employment for at least 10 years?			Yes
1.2: Has there been any recent development activity, within the last 5 years?			Yes
1.3: Is the site being actively marketed as an employment site?			Yes
1.4: Is the site owned by a developer or another agency known to undertake employment development?			Yes
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?			No
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?			Yes
1.7: Is the site immediately available?			Yes
Market Appraisal	This site represents an extension and intensification to an established and permitted employment area.		
Adjacent land use and conflicts	The site has Gosport Road and Crofton School to north; Public open space to east; Airport infield and main runway to east and south; Stubbington to west.		
Known constraints and infrastructure requirements	Site has limited constraints and benefits from improvements to the strategic road network.		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.			No
2.2: Is the site identified or likely to be required for a specific user or specialist use?			Yes
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?			Yes
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?			Yes
Strategic Planning and Access	Application For Approval Of Reserved Matter (Access) To Outline Approval P/11/0436/Oa. To Provide Internal Access Road From Daedalus West (Swordfish Business Park) To Gosport Road & Construction Of Aircraft Taxiway – 2017.		
Recommendation	Site Score B – Above Average. The site provides design and build opportunities for B1, B2 and B8 occupiers within the aviation industry with access to an operating airfield. Its access has been significantly improved following works to the strategic road network.		

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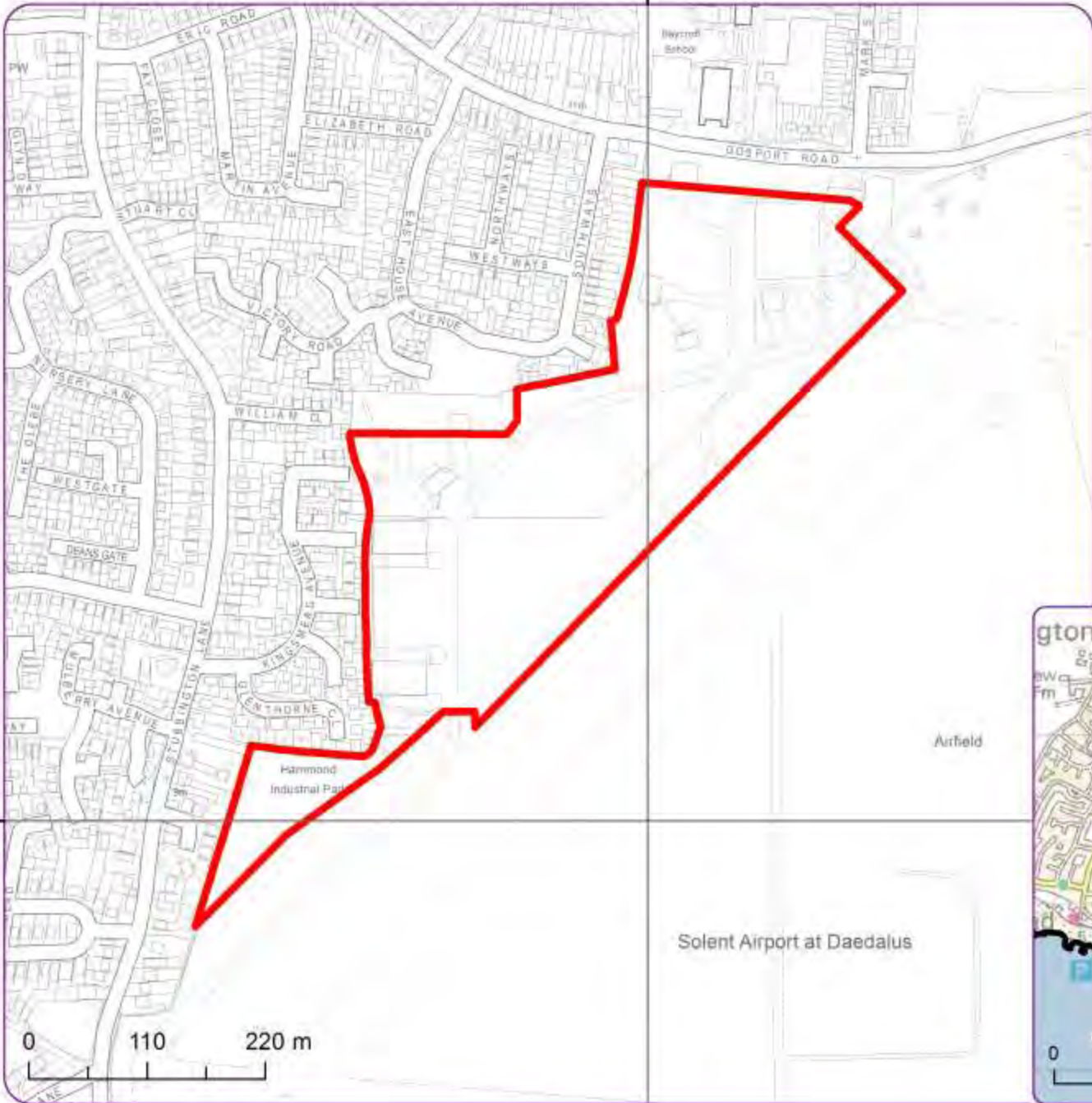
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SITE ID 3114

**SWORDFISH BUSINESS PARK,
DAEDALUS WEST**



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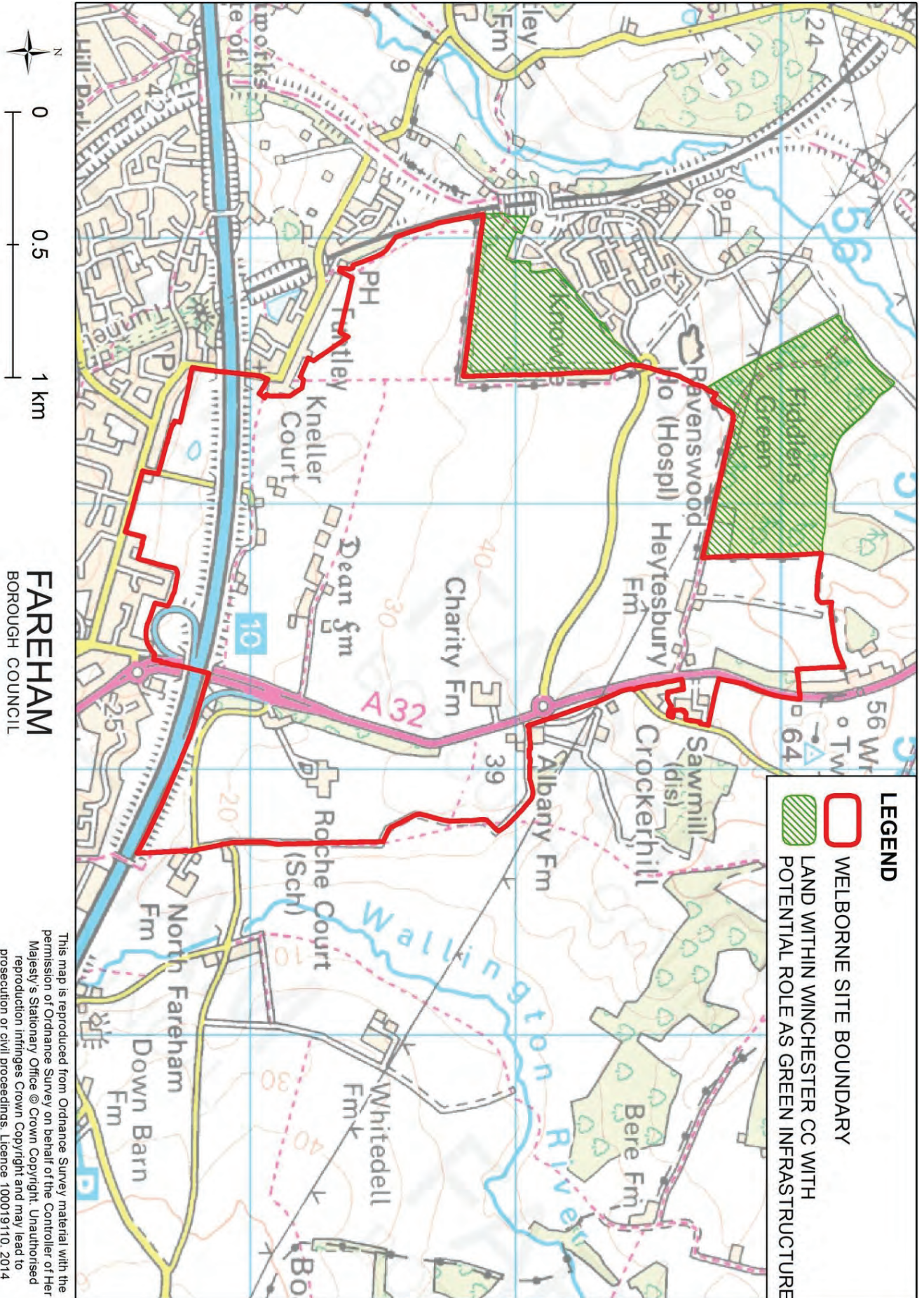


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FBC EMPLOYMENT LAND STUDY – 2018

Site Address Welborne			
Site Ref	xxxx		
Ward	Fareham	Size	20 Ha (approximately)
Market Segment	B1 & B2		
Description of Site and Location:	<p>Expected to deliver 97,250 sq m of employment space The Welborne site is currently predominantly used for arable farming with some light industrial and commercial buildings at Dean Farm, Charity Farm and Crockerhill. There are also farmsteads, a few isolated residential properties and an independent preparatory school, called Boundary Oak School, at Roche Court. The planning application includes commercial, industrial, warehousing and employment space comprising up to 30,000 sq m of commercial and employment space (B1); up to 35,000 sq m of general industrial use (B2); up to 40,000 sq m of warehousing space (B8) as part of the overall development.</p>		
Market Attractiveness Criteria			
1.1: Has the site been formally identified for employment for at least 10 years?			Yes
1.2: Has there been any recent development activity, within the last 5 years?			No
1.3: Is the site being actively marketed as an employment site?			Yes
1.4: Is the site owned by a developer or another agency known to undertake employment development?			Yes
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?			No
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?			No
1.7: Is the site immediately available?			Yes
Market Appraisal			
Adjacent land use and conflicts	<p>The site is mainly open countryside located to the north of the existing urban area of Fareham. The site is defined by the valley of the River Meon to the west and by the heavily wooded 'Forest of Bere' landscape to the north. The east is defined by the rolling, chalk downland landscape of Portsdown Hill and the valley of the Wallington River, whilst the M27 motorway and the urban area of Fareham define the south.</p>		
Known constraints and infrastructure requirements	<p>Known constraints on the site include traffic-derived noise from the M27, utilities infrastructure, flooding and groundwater, minerals safeguarding area, nature conservation, there are heritage and listed buildings on site, road network infrastructure works.</p>		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.			Yes
2.2: Is the site identified or likely to be required for a specific user or specialist use?			No
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?			Yes
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?			Yes
Strategic Planning and Access	<p>A planning application has been submitted reference P/17/0266/OA, which is currently under consideration.</p>		
Recommendation	<p>Site Score xx – Good. The site provides a significant area of employment land for the borough and will provide brand new, high quality commercial space, which will be conveniently located within close proximity to the M27.</p>		

Figure 3.1: The Welborne Site



Appendix 2
Existing Employment Site Grades and Assessment Criteria



	core-	Possible-Indicators-
5 C	High	Adjoining-main road-or-motorway-junction;-ease-of access-for-all vehicles;-access-to-rail,-air-or-sea-networks.-
4 C	Above-verage	Close-to-major-road-network;-ease-of access-for-all vehicles.
3 C	Average	Reasonable site-access-for-all vehicles;-indirect-or-restricted-access-to-major-road-network.-
2 C	Below-Average	Restricted-access-for-HGV's;-restricted-access-to-major-road-networks.-
1 C	Low	Restricted-access-for-all commercial vehicles;-severely-limited-access-to-major-road-networks.-



	core-	Possible-Indicators-
5 G	High	Designed-to-modern-standard;-attractive-landscaping-and-environment;-very-easy-manoeuving;-no-obstructions;-Gateway-site;-visible-from-major-road-network.-
4 G	Above-verage	Acceptable-design;-adequate-landscaping-and-environment;-easy-manoeuving;-no-obstructions;-visible-site;-on-a-main-road-or-prominent-frontage.-
3 G	Average	Acceptable-design-with-some-limitations;-inadequate-landscaping;-manoeuvring-compromised;-obstructions;-close-to-a-main-road-or-reasonably-prominent-estate-but-tucked-away-from-view.-
2 G	Below-Average	Poor-design,-old-standard-with-limitations;-inadequate-landscaping-and-manoeuving-restricted;-obstructions;-visible-to-a-minor-road-or-within-estate.-
1 G	Low	Historic-design-and-unacceptable-layout;-no-landscaping-and-manoeuving-severely-restricted;-obstructions;-on-a-minor-road-or-estate-tucked-away-from-view.-



	core-	Possible-Indicators-
5 G	High	Well established-commercial area;-compatibility-and-uniformity-of-uses.-
4 G	Above-verage	Established-commercial area;-mainly-compatible-and-uniformity-of-uses.-
3 G	Average	Mixed-commercial area-with-residential nearby;-mainly-compatible-uses.-
2 G	Below-Average	Mainly-residential with-few-commercial uses or-rural area;-incompatible-uses.-
1 G	Low	Mainly-residential with-very-few-commercial uses or-rural area;-non-conforming-uses.-

	core-	Possible-Indicators-
5 C	High	Close-to-a-wide-range-of-employment-related-services-(e.g.-shops,-leisure/recreation,-pubs/restaurants,-banks);-close-to-a-station-or-peak-time-bus-route-or-cycle-route,-on-a-pedestrian-route.- NB:- 'Close'=-within-about-10-minutes'-walk.-
4 C	Above-verage	Close-to-a-reasonable-range-of-employment-related-services;-close-to-a-station-or-peak-time-bus-route-or-cycle-route,-on-a-pedestrian-route.-
3 C	Average	Close-to-a-limited-range-of-basic-services;-close-to-either-a-station,-bus-route-or-cycle-route,-on-a-pedestrian-route.-
2 C	Below-Average	Car-journey-to-access basic-services;-not-near-a-station,-bus-route-nor-cycle-route,-not-on-a-pedestrian-route.-
1 C	Low	No-services-in-close-proximity;-not-on-a-pedestrian-route,-not-near-a-station,-bus-route-nor-cycle-route.-

	core-	Possible-Indicators-
5 C	Good	Detailed-or-outline-permission;-use-flexibility;-compliant-or-established-lawful use.-
3 C	atisfactory	Local Plan-allocation-or-protected-site-or-high-probability-of-granted-employment;-mainly-compliant-but-some-un-neighbourly-uses.-
1 C	Poor	No-allocation;-non-conforming-uses;-suit-change-of-use-to-non-'B'-class-employment-e.g.-residential.-

	core-	Possible-Indicators-
5 C	High	Highly-regarded;-very-good-market-appeal;-attracts-and-achieves-prime-values.-
4 C	Above-verage	Well regarded;-good-market-appeal;-attracts-close-to-prime-values.
3 C	Average	Displays-market-appeal;-day-to-day-churn;-attracts-secondary-values.
2 C	Below-Average	Occupier-resistance;-limited-market-appeal;-longer-void-rates;-command-below-secondary-values.-
1 C	Low	Virtually-no-market-appeal;-occupiers-highly-reluctant;-longest-void-periods;-tertiary-values.-

7- ge-and-suitability-of-built-stock-(fit-for-purpose)-

	core-	Possible-Indicators-
5 C	High	Built-2000-onwards;-quality-as-'Grade-A'-specification-to-attract-national/corporate-occupiers;-FRI-or-close-to-condition:- Industrial - 6.5m-plus-eaves;-adequate-loading-and-parking- Offices—open-plan-accommodation-on-single-floor-plates,-air-conditioning,-excellent-car-parking-ratio-and-fibre-optic-connectivity.-
4 C	Above-verage	Mainly-built-1990's-onwards;-modern-specification-may-attract-national occupiers;-FRI-or-75%-condition.- Industrial - 6m-plus-eaves;-adequate-parking-and-loading;- Office—mainly-open-plan-accommodation,-air-conditioning,-good-car-parking-ratio-and-broadband-connectivity.-
3 C	Median	Mainly-built-1980's-onwards;-adequate-specification,-more-suitable-to-local businesses.- Industrial - 5m-to-eaves-upwards;-adequate-loading-and-parking.- Office- mainly-open-plan-accommodation,-air-conditioning,-adequate-car-parking-ratio-and-broadband-connectivity.-
2 C	Below-Average	Built-before-1980;-inadequate-specification-compared-to-modern-units,-suitable-to-local businesses-and-un-neighbourly-uses.- Industrial - 5m-eaves-or-below;-poor-loading-and-parking;- Office—cellular-offices,-minimal parking-and-basic-fitout.-
1 C	Low	Built-before-1980,-old-stock;-inadequate-specification-suitable-for-refurbishment-or-redevelopment;-only-attract-smaller,-local-businesses-with-un-neighbourly-uses.-

	core-	Possible-Indicators-
5 G	Very-Low	Building-too modern-to-redevelop;-OMV-(Open-Market-Value)-far-exceeds-site-value.-
4 G	Long-Term	unlikely-within-next-25 years;-OMV-exceeds-site-value.-
3 G	Medium-Term	Potential to-redevelop-within-15 25-year-timescale;-OMV-closer-to-site-value.-
2 G	hort-Term	Redevelopment-likely-within-5 15 year-period;-OMV-marginally-above-site-value.-
1 G	Very-High	Redevelopment-highly-likely-within-next-5-years;-limited-constraints;-site-value-equal or-exceeds-OMV-of-existing-buildings.-

Replacement- ssesment-criteria-(for-Categories-7 &8)-to - scoring-system-in-respect-of-Potential- evelopment- ites-or- Existing- ites-meriting-consideration-for-Redevelopment.-

7- Viability-Test-/Infrastructure-Cost-

	core-	Possible-Indicators-
5 C	High	trong,-credible-appraisal;-profitable;-commercially-attractive;-good-risk-profile;-relatively-modest-infrastructure-required.-
4 C	Good	Positive,-credible-appraisal;-profitable;-commercially-attractive;-acceptable-risk-profile;-relatively-modest-infrastructure-costs.-
3 C	Medium	Credible-appraisal;-profitable;-reasonably-attractive;-higher-risk-profile;-infrastructure-cost-above-norm.-
2 C	Poor	Marginal appraisal;-likely-to-be-unprofitable;-unattractive;-high-risk;-infrastructure-costs-above-norm.-
1 C	Remote	Negative-appraisal;-unprofitable;-no-market-appetite;-high-risk;-unsustainable-infrastructure-costs.-

8- eliverability-

	core-	Possible-Indicators-
5 G	High	ingle-ownership;-no-title-nor-planning-constraints;-highway-access-and-infrastructure-readily-achievable;-timing-0-5 years.-
3 G	Reasonable	ingle-or-multiple-ownership;-any-title-or-planning-constraints-can-be-overcome;-highway-access-and-infrastructure-cost-and-timing-present-challenges;-timescale-5-10 years.-
1 G	Low	Ownership-or-title-issues-to-overcome;-severe-planning-constraints-and-infrastructure-challenges;-timescale-10-years-and-beyond.-

oring—overall-classification-

Quality-	core-	Total - core-
rG G C	High	35-and-over
rG G C	Above-verage	30 34.5
rG C C	Average	25 29.5
rG D C	Below-Average	20 24.5
rG E C	Low	19.5 and-under

Appendix 3
Individual Site Scoring Matrix – Existing and Potential

Reference	Site name/address	Size (Ha)	Size (sq m)	Type	Strategic Location	Layout/Prominence	Area Character	Local Amenities	Planning Status	Occupier Perception	Viability/Infrastructure Need	Deliverability	Total score	Grade A E
xxxx	Welborne	20	97,250	Development	5	5	5	5	3	5	3	3	34	A
205	Land North of St Margarets Roundabout	1.23	4,000	Development	5	5	4	3	3	5	5	5	35	A
2001	J9 South, Segensworth South (Talbot Road)	1,843	4,000	Development	5	5	4	3	5	5	5	5	37	A
124	Solent 2, Whiteley (Rookery Avenue)	9.84	23,500	Development	5	4	4	4	3	4	4	5	33	B
137	Swanwick Shore Road	0.36	2,279	Development	4	4	3	3	3	4	4	5	30	B
1999	Walled Garden, Cams Estate	1.66	1,952	Development	5	4	5	3	3	4	3	3	30	B
3113	Faraday Business Park, Daedalus East	44.25	28,000	Industrial/Development	4	5	5	3	3	5	4	5	34	B
3114	Swordfish Business Park, Daedalus West	16.47	22,000	Development	4	5	5	3	3	5	4	5	34	B
1352	Land at Pinks Hill	0.7	2,000	Development	3	4	4	2	3	3	4	3	26	C
1365	Land Adjoining Waste Transfer Station	1.05	4,000	Development	3	4	4	2	3	3	4	3	26	C
3034	Land at Military Road	1.23	4,750	Development	3	4	4	2	3	3	4	3	26	C
3054	Land at Telford Way	2.75	10,000	Development	5	4	5	3	3	5	3	1	29	C
20	Standard Way, Wallington	0.59	2,000	Development	3	3	3	2	3	3	3	3	23	D
3011	Down Barn Farm / Spurlings	32.85	30,000	Development	5	3	1	2	1	4	3	3	22	D
3022	Land West of Newgate Lane, Peel Common	3.06	10,000	Development	3	3	3	2	1	3	3	3	21	D
3025	Little Park Farm	5.73	11,200	Development	3	4	3	2	3	3	3	3	24	D

Reference	Site name/address	Size (Ha)	Size (sq m)	Type	Strategic Location 1	Layout/ Prominence 2	Area Character 3	Local Amenities 4	Planning Status 5	Occupier Perception 6	Age/ Suitability 7	Redevelopment Prospects 8	Total score	Grade A-E
78	Segensworth South Industrial Estate, North & South (Kites Croft) of Southampton Road	40.4	283,223	Industrial	5	4	5	3	5	5	4	5	36	A
79	Segensworth East Industrial Estate, Brunel Way & Barnes Wallis Road	35.2	195,492	Office/Industrial	5	4	5	3	5	5	4	5	36	A
80	Segensworth West Industrial Estate, off Little Park Farm Road	23.37	70,964	Office/Industrial	5	4	5	3	5	5	4	5	36	A
165	Cams Estate	6.77	18,952	Office	5	5	5	3	5	5	4	5	37	A
1628	South of Solent Way, Whiteley	0.614	1,678	Industrial	5	4	5	3	5	5	5	5	37	A
63	Murrills Estate	7.45	50,783	Industrial	4	4	3	4	5	4	3	4	31	B
74	Newgate Lane & Speedfields	27.04	125,234	Industrial	4	3	4	4	5	4	3	4	31	B
128	Furzehall Farm, Wickham Road	1.96	5,618	Office	4	3	3	3	5	4	4	4	30	B
2985 (39)	Fareham Industrial Estate and Broadcut	18.64	117,837	Industrial	4	4	5	3	5	4	3	4	32	B
63a	Castle Trading Estate	part of above	part of above	Industrial	4	2	3	4	5	3	2	2	25	C
76	Fort Fareham Industrial Estate, off Newgate Lane	4.26	14,228	Industrial	3	3	4	3	5	3	3	4	28	C
77	Palmerston Business Park, off Newgate Lane	2.84	16,816	Industrial	4	3	4	3	5	2	3	4	28	C
81	Park Gate Centre & North (Park Gate Employment Area, Botley Road and Duncan Road)	7.79	32,067	Office/Industrial	2	2	3	4	5	3	3	3	25	C
82	Park Gate Business Centre, Chandlers Way (off Botley Road)	1.7	11,658	Industrial	2	3	3	3	5	3	3	3	25	C
86	1&2 The Avenue	0.19	557	Industrial	4	3	3	3	5	3	2	2	25	C
87	West End (West), South of Station Roundabout	0.16	1,300	Office	4	3	3	3	5	3	2	2	25	C
95	Funtley Court, Funtley Hill	0.82	2,334	Office	3	3	2	3	5	3	3	3	25	C
100	Swanwick Business Park & Oslands Court, off Bridge Road	0.41	2,476	Industrial	4	3	3	3	5	4	3	3	28	C
127	Parkway, Wickham Road	1.34	5,790	Office	4	3	2	3	5	3	3	3	26	C
173	National Air Traffic Services (NATS), Sopwith Way	17.33	59,625	Office	3	3	4	2	5	4	4	4	29	C
186	Albany Business Centre	0.5	572	Industrial	4	3	2	2	5	3	3	3	25	C
1700	242-248 Gosport Road	0.744	2,781	Industrial	4	3	3	3	5	3	3	3	27	C
2960 (84)	Part of Fareham Point, Wickham Road & North End of High Street	2.2	Unknown	Office	3	3	3	4	5	3	3	2	26	C
40	Gosport Road Bus Depot	2.16	8,400	Industrial	4	2	3	3	3	2	1	2	20	D
65	Fort Wallington Industrial Estate (North Wallington, off Standard Way)	6.23	39,524	Industrial	3	2	4	2	5	3	2	3	24	D
85	Lysses Court	0.32	2,968	Industrial	1	1	2	5	5	2	2	2	20	D
88	West End (East), South of Station roundabout	part of above	part of above	Industrial	4	2	3	3	5	2	1	1	21	D
90	Boatyard Industrial Estate, Mill Road	0.42	2,297	Industrial	2	2	1	2	5	3	2	3	20	D
91	Lower Quay & Quayside	0.54	3,605	Office	2	2	2	2	5	2	2	3	20	D
92	Salterns & Delta Business Park, Salterns Lane	1.28	4,675	Office/Industrial	2	2	2	2	5	3	3	3	22	D
93	Hammond Industrial Park, Stubington Lane	0.43	1,168	Industrial	2	3	2	3	5	3	2	2	22	D
94	Corner of Stow Estate and Highlands Road	0.32	1,415	Industrial	3	3	2	3	5	3	2	2	23	D
96	The Tanneries, Titchfield Hill	0.61	6,558	Industrial	3	2	2	3	5	3	2	3	23	D
98	Brook Avenue/ Brook Lane (junction of)	0.34	1,632	Office	2	3	2	3	5	3	3	3	24	D
99	Warsash Village Centre, off of Shore Road	0.35	3,270	Industrial	2	2	3	3	5	3	2	3	23	D
138	Blackbrook Road Industrial Estate	1.69	9,804	Industrial	2	3	2	2	5	3	2	3	22	D
139	Waterside House, North of Delme Roundabout	1.28	3,796	Office	3	3	2	3	5	3	3	2	24	D
161	High Walls, North of East Street	0.23	1,431	Office	1	1	2	5	5	2	2	2	20	D
163	Castle Court, northern end of Castle Street	0.11	888	Office	3	2	3	4	5	2	2	2	23	D
187	310A-312 & 316 Botley Road	1.59	1,747	Industrial	3	2	2	2	5	2	2	2	20	D
1267	Brook Lane	0.32	2,960	Industrial	3	3	3	4	5	2	2	1	23	D
126	Kiln Acre, Wickham Road	2.38	15,644	Office/Industrial	4	3	3	3	5	3	2	1	24	D
97	R.O. Bridge Road Parade	0.27	988	Industrial	2	1	1	4	5	2	1	1	17	E
101	Coal Park Lane	0.24	950	Industrial	2	1	2	2	5	2	2	2	18	E
133	Barnbrook Systems	0.12	956	Office	1	1	1	3	5	1	2	2	16	E
179	Spurlings Road Industrial Estate	2.11	4,120	Industrial	3	1	2	1	5	2	2	2	18	E
1261	Cranleigh Road	2.39	2,953	Industrial	2	1	2	2	3	1	1	1	13	E
1274	Carron Row Farm	0.55	572	Industrial	1	1	1	1	3	1	1	1	10	E
1275	St Margarets Lane	0.44	4,503	Industrial	2	2	2	2	5	2	2	2	19	E
1276	North Coal Park Lane	0.6	1,674	Industrial	1	1	2	1	5	2	3	3	18	E
1280	Great Brook	1.09	3,133	Industrial	2	2	2	3	5	2	1	1	18	E
1281	Fontley Farm House (Ironmill Lane)	0.86	1,443	Industrial	1	1	1	1	3	2	2	2	13	E
3033	Land at Peak Lane Nurseries	3.54	15,000	Industrial	2	1	2	2	5	1	1	1	15	E

Appendix 4
LSH Credentials

LSH CREDENTIALS

LSH is the United Kingdom and Ireland's largest commercial property consultancy (a subsidiary of Countrywide Plc). We have a national network of offices across 31 locations and over 1,400 employees. Along the South Coast we have two offices at Fareham and Southampton with agency and valuation departments. We have an intuitive appreciation of the market dynamics and recently for the thirteenth consecutive year, have been awarded by the national Estate Gazette publication, the Most Active Agent in Hampshire and Dorset and in 2017 were ranked first by EGi the Most Active National Agent in the Industrial category and the Office category. During 2017 LSH's South Coast team transacted over 1.7 million sq ft of business space in the region.

The principal author of this report, Robin Dickens has during the past 30 years, built up a comprehensive knowledge of the industrial and commercial property market in South Hampshire, particularly in an agency and development advisory capacity within the Fareham conurbation and travel to work area and has resided at the Firms Manor Court offices at Segensworth since 1989. He has also participated directly in the local business community being an active member of the Shaping The Future Group (Development Committee), a Past President of the Portsmouth and South East Hampshire Chamber of Commerce, a founder Director of the Segensworth Business Forum, a former contributor to the Land and Property Task Group of Hampshire Economic Partnership, former Governor at Highbury College (2003 – 2013) and is currently a Board member of the Land, Infrastructure and Property Panel of the Solent LEP.

Notably, the author has advised and been instructed to market by private clients / institutional landlords etc, many surplus industrial and office premises in Fareham and South East Hampshire and has also acted on behalf of both local and corporate companies seeking new accommodation in the Solent region. This has informed from firsthand experience an insight into the mindset of a prospective occupier and the specific criteria they are looking for when selecting a new building or site. We have gained an in-depth knowledge of the dynamics of the local market and current and past projects have included the marketing of the Daedalus employment sites within the Solent

Enterprise Zone, Fort Wallington Industrial Estate, Premier Business Centre, iO Centre, Kites Croft, Segensworth East & West Estate, Radial 27, J9 South on Cartwright Drive, The Gardens, Cams Estate, Trilogy etc; and also recently handled the marketing of the former BAe Shipbuilding facility in HM Naval Base in Portsmouth; and undertaken property acquisitions for companies such as EADS Airbus, Snecma Turbomeca, Angelica Windows, Scania, Babcock International, Scottish and Southern Plc, PETA, Inchcape, Hampshire Police, Hendy Ford etc.

LSH is a multi-disciplinary practice, having expertise in industrial, offices, retail, roadside and leisure property. Our surveyors deal with day-to-day agency and disposals, development appraisals, company acquisition, investment and funding advice, property. Over the past 5 years, we have been investing selectively in geographic areas and service lines where we are seeing considerable demand for our services. Bringing BTWShiells (the sixth largest manager of shopping centres in the UK), Tushingham Moore (the largest retail agency outside of London), ES Group (a well-respected practice with a strong regional presence), Douglas Newman Good Commercial (one of Ireland's most successful commercial agencies) and most recently Hodgson Elkington (Lincolnshire's number 1 commercial property agency) and Lawrence Tattersall (Lead surveyors in Sheffield) into the Lambert Smith Hampton fold is perfectly aligned with this strategy; with each acquisition complementing the others and giving us critical mass in markets where there is significant potential.

Appendix 5
Supplementary Fareham Borough Demographics



PO16

Understanding Demographics

20 November, 2018

Contents

- Map showing your Area
- Understanding the Demographics of your Area
- Understanding the Residential Profile by Mosaic UK 6
- Understanding the Top 3 Mosaic UK 6 Groups
- Daytime Population Profile by Mosaic UK 6
- Population Growth
- Explanation - Population Projections
- Explanation - Mosaic UK 6
- Explanation - Mosaic UK 6 Daytime
- Explanation - Census

Describing Fareham in relation to United Kingdom
 Creation Date: November 20, 2018

Map showing your area



Geography Selection:

Fareham

Boundary Colour:

Geography Selection

Mapping data: © 2017 HERE.
 Copyright Experian 2017.

Date: 20/11/18

Summary of your area

There are 116,737 people living within Fareham of which 57,359 are male and 59,378 are female.
 Within this Population 61,399 are economically active whilst 23,082 are classed as economically inactive.
 79.10 % of houses are owner occupied whilst 11.81 % are privately rented.
 The three highest Mosaic groups are B Prestige Positions, E Senior Security and G Domestic Success.
 The Population of the area is expected to change by 3.63 % by 2022 .

Describing Fareham in relation to United Kingdom
Creation Date: November 20, 2018

Understanding the make-up of your area

	Area	Base	
Total Households	49,044	28,142,119	The current year estimates show a total resident population of 116,737 in the study area, compared to 66,745,948 in the base selection. When looking at households there are 49,044 in your area and 28,142,119 in your base selection. This was split by 50.86 % of the population being female and 49.14 % being male in the study area.
Total Population	116,737	66,745,948	
Total Males	57,359	32,933,023	
Total Females	59,378	33,812,925	

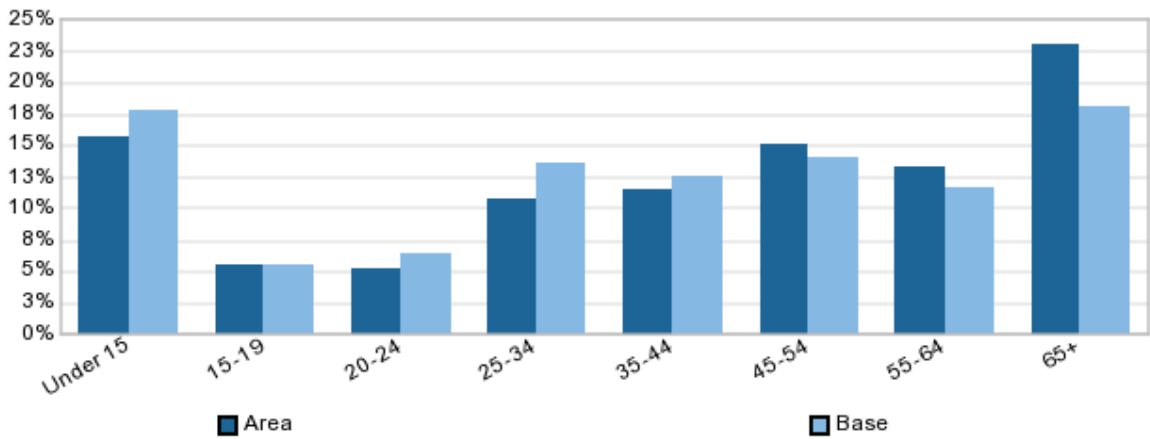
Source: Experian Current year estimates (Mid-year 2017).

Understanding who lives in your area

Age Bands	Area	Base	Index	Index Scale		
				76	100	129
Under 15	18,394	11,904,830	88	-----		
15-19	6,554	3,726,517	101	-----		
20-24	5,954	4,277,727	80	-----		
25-34	12,538	9,104,574	79	-----		
35-44	13,287	8,401,002	90	-----		
45-54	17,606	9,319,901	108	-----		
55-64	15,498	7,859,716	113	-----		
65+	26,906	12,151,681	127	-----		

Source: Experian Age and Gender Estimates (2017).

Chart explanation: The chart above represents the Index* value. This indicates the over or under representation of the area selection relative to the base.



The highest proportion fall into age band 65+ with a count of 26,906 representing 23.05 % of the study area. The smallest proportion is in age band 20-24 with a count of 5,954 which represents 5.10 %. In the study area the most over represented age band in comparison to the base selection is 65+ with an index value of 127. The band that is most under represented is 25-34 with an index of 79, where an index* of 100 represents the national average.

*An index of 100 indicates that the variable shown is represented to the same degree in the target area as it is in the base area. An index of 200 would show that it has twice the representation.

Understanding the Ethnic mix

Ethnic Mix	Area	Base	Index
White	112,808	57,844,833	112
Gypsy / Traveller / Irish Traveller	88	67,521	75
Mixed / Multiple Ethnic Groups	1,392	1,355,607	59
Asian / Asian British: Indian	705	1,546,191	26
Asian / Asian British: Pakistani	76	1,231,279	4
Asian / Asian British: Bangladeshi	129	500,030	15
Asian / Asian British: Chinese	496	490,816	58
Asian / Asian British: Other Asian	370	960,820	22
Black / African / Caribbean / Black British	413	2,101,045	11
Other Ethnic Group	260	647,806	23

Source: Experian Current Year Estimates based on ONS Census Data (2017).

Chart explanation: The chart above represents the Index* value. This indicates the over or under representation of the area selection relative to the base.

The ONS data shows the ethnic make up of your area is Compare this to your base ethnic diversity as follows: as follows:

96.63 % White	86.66 % White
0.08 % Gypsy / Traveller / Irish Traveller	0.10 % Gypsy / Traveller / Irish Traveller
1.19 % Mixed / Multiple Ethnic Groups	2.03 % Mixed / Multiple Ethnic Groups
0.60 % Asian / Asian British: Indian	2.32 % Asian / Asian British: Indian
0.07 % Asian / Asian British: Pakistani	1.84 % Asian / Asian British: Pakistani
0.11 % Asian / Asian British: Bangladeshi	0.75 % Asian / Asian British: Bangladeshi
0.42 % Asian / Asian British: Chinese	0.74 % Asian / Asian British: Chinese
0.32 % Asian / Asian British: Other Asian	1.44 % Asian / Asian British: Other Asian
0.35 % Black / African / Caribbean / Black British	3.15 % Black / African / Caribbean / Black British
0.22 % Other Ethnic Group	0.97 % Other Ethnic Group

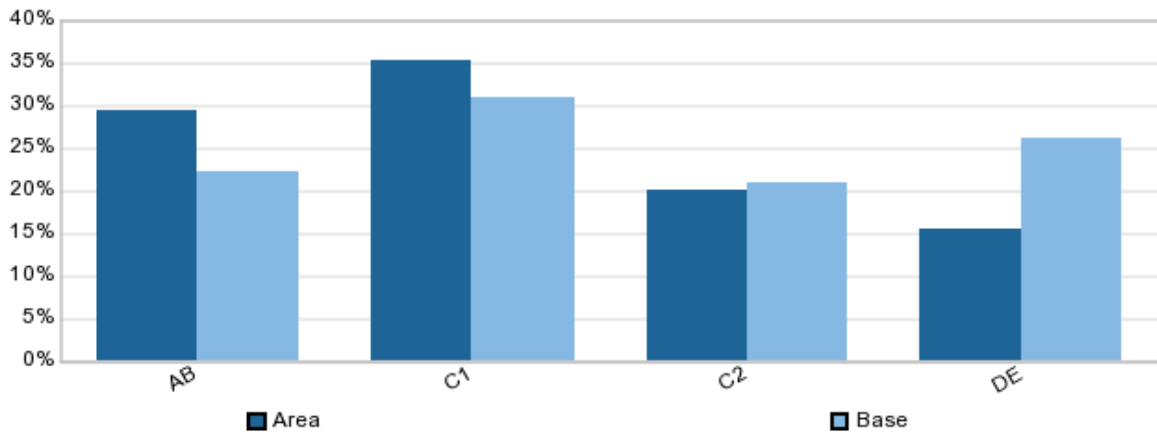
In the study area the largest ethnic group is White taking up 96.63 % of the population with a count of 112,808. This is in comparison to the selected base with 86.66 % of the population being White. The smallest ethnic representation in the study area was Asian / Asian British: Pakistani with a count of 76, compare this to the base selection where the smallest group was Gypsy / Traveller / Irish Traveller with a count of 67,521.

Understanding the Social Grade

Social Grade	Area	Base	Index
AB Higher & intermediate manage/admin/prof	10,001	4,656,792	132
C1 Supervisory, cleric, junior manage/admin/prof	11,967	6,457,466	114
C2 Skilled manual workers	6,760	4,346,904	96
DE Semi-skilled/unskilled manual workers; on state benefit, unemployed, lowest grade workers	5,200	5,420,042	59

Source: Experian Current Year Estimates based on ONS Census Data (2017).

Chart explanation: The chart above represents the Index* value. This indicates the over or under representation of the area selection relative to the base.



*An index of 100 indicates that the variable shown is represented to the same degree in the target area as it is in the base area. An index of 200 would show that it has twice the representation.

Within your area social grade C1 forms the largest proportion with 11,967 people falling into this group, which is 35.27 % of the overall distribution. The smallest proportion falls into grade DE with a count of 5,200 taking up 15.33 %. When comparing this to the selected base the most over represented grade is AB with an index* count of 132, whereas the most under represented group is DE with an index count of 59.

Understanding the Economic Activity

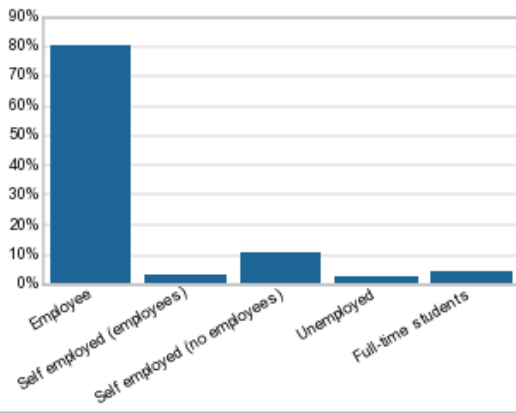
Economically Active	Area	Base	Index ⁵⁴
Employee	49,315	26,076,358	104
Self employed with employees	1,664	1,109,304	83
Self employed without employees	6,362	3,640,917	96
Unemployed	1,415	1,365,424	57
Full-time students	2,643	1,684,209	87

Economically Inactive	Area	Base	Index ⁵²
Retired	14,518	6,581,697	141
Student	2,779	2,819,256	63
Looking after home/ family	2,833	2,121,753	85
Permanently sick/ disabled	1,915	2,156,190	57
Other	1,037	1,082,958	61

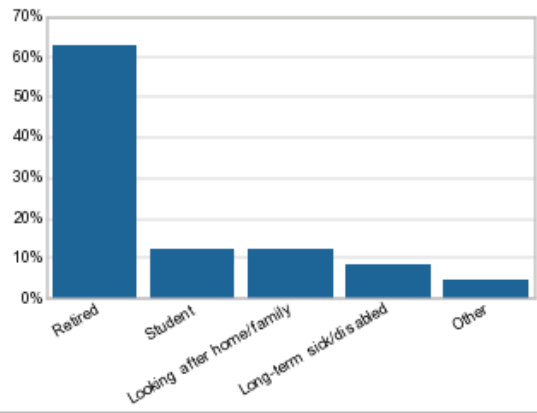
Source: Experian Current Year Estimates based on ONS Census Data (2017).

Chart explanation: The chart above represents the Index* value. This indicates the over or under representation of the area selection relative to the base.

Economically Active - % by Category



Economically Inactive - % by Category



Economic activity within the study area shows that 58.37 % of the population are employed, this is 49,315 people, compare this to your base where 53.61 % are employed. The smallest economically active group is Unemployed representing 1.67 %, compare this to the selected base where this group represents 2.81 %. When analysing index* values the most over represented group is None found with an index of 104, taking up 58.37 %.

When considering economic inactivity the largest proportion in the study area belongs to the Retired group with a count of 14,518 representing 17.18 %. The smallest inactive group is Other with 1,037 which is 1.23 %. When looking at the index values the group that is most over represented is Retired with an index of 141, representing 17.18 %.

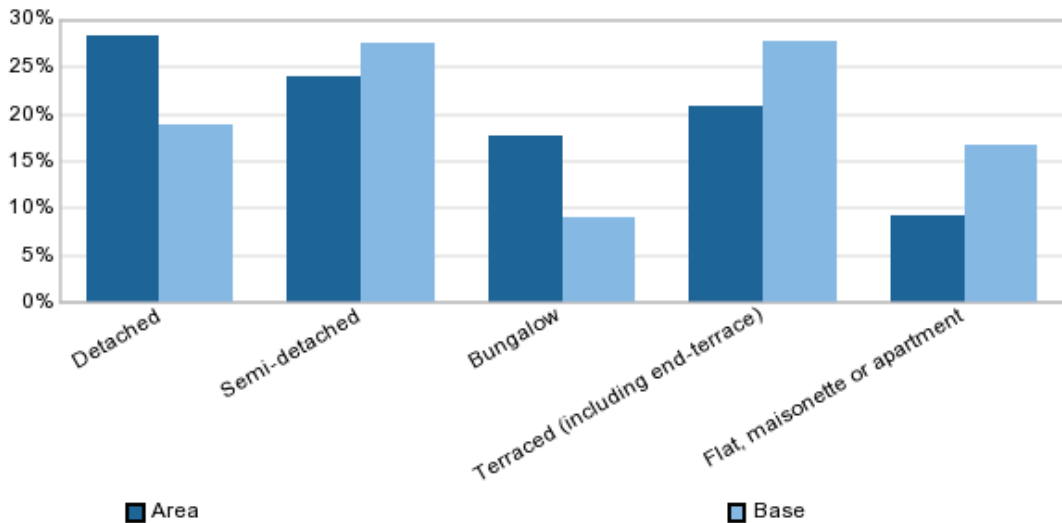
*An index of 100 indicates that the variable shown is represented to the same degree in the target area as it is in the base area. An index of 200 would show that it has twice the representation.

Understanding what type of households are in your area

Dwelling Type	Area	Base	Index
Detached	12,701	4,776,358	150
Semi-detached	10,729	7,000,011	87
Bungalow	7,918	2,328,763	192
Terraced (including end-terrace)	9,344	7,013,089	75
Flat, maisonette or apartment	4,216	4,231,207	56

Source: Experian ConsumerView Household Directory 2018 .

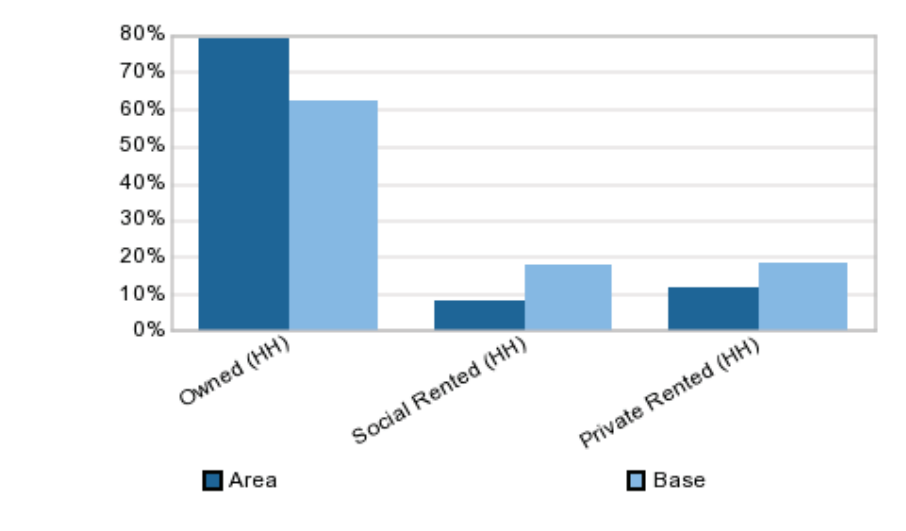
Chart explanation: The chart above represents the Index* value. This indicates the over or under representation of the area selection relative to the base.



Tenure	Area	Base	Index
Owned (HH)	38,793	17,529,474	127
Social Rented (HH)	4,045	4,960,995	47
Private Rented (HH)	5,794	5,283,863	63

Source: Experian Current Year Estimates based on ONS Census Data (2017).

Chart explanation: The chart above represents the Index* value. This indicates the over or under representation of the area selection relative to the base.



10,729 households within your area live in a Semi-detached dwelling, this is 23.89 %. Compare this to a figure of 7,000,011 in your base making up 27.61 %. The smallest number of households live in a Flat, maisonette or apartment dwelling, this is 4,216 households and makes up 9.39 %. When analysing the index* figures, we can deduce that the most over represented dwelling type is Bungalow with a figure of 192, this makes up 17.63 % in the study area.

When considering the tenure of households we can see that the largest proportion are Owned with a figure of 38,793 making up 79.10 %. The smallest amount fall into the Social rented at 8.25 %. When looking at the index figures the most over represented tenure type is Owned with an index of 127, 79.10 % of households fall into this category in the study area.

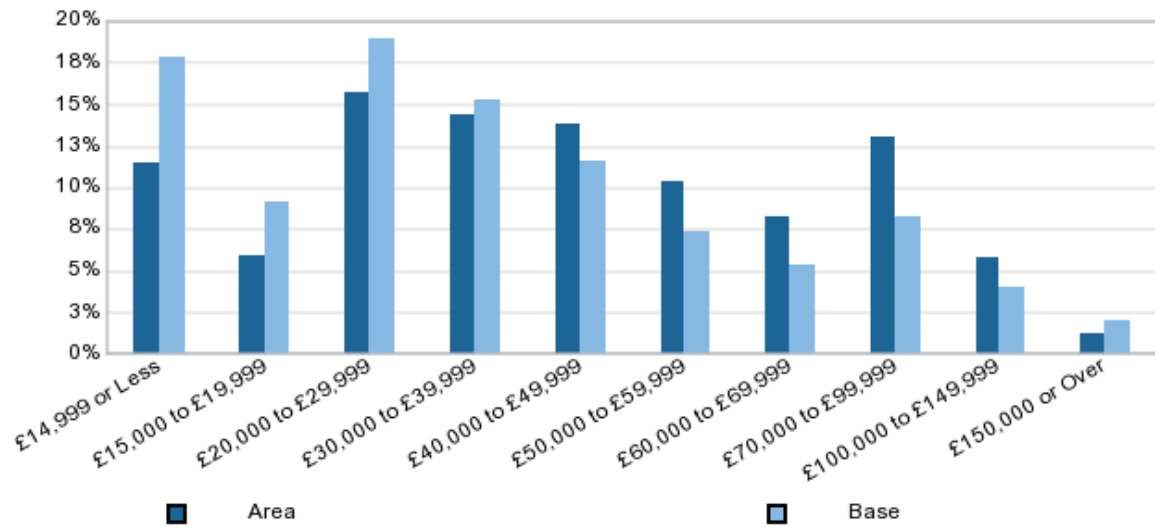
*An index of 100 indicates that the variable shown is represented to the same degree in the target area as it is in the base area. An index of 200 would show that it has twice the representation.

Understanding the Household Income

Household Income	Area	Base	Index
£14,999 or Less	5,663	5,033,061	65
£15,000 to £19,999	2,893	2,581,864	64
£20,000 to £29,999	7,673	5,311,802	83
£30,000 to £39,999	7,071	4,306,457	94
£40,000 to £49,999	6,812	3,278,453	119
£50,000 to £59,999	5,061	2,058,623	141
£60,000 to £69,999	4,063	1,520,803	153
£70,000 to £99,999	6,393	2,343,681	157
£100,000 to £149,999	2,848	1,118,876	146
£150,000 or Over	567	588,499	55

Source: Experian Income Bands 2016

Chart explanation: The chart above represents the Index* value. This indicates the over or under representation of the area selection relative to the base.



8,556 households within your area have an income of £19,999 or less, this forms 17.45 % of the overall distribution. The smallest count is 567 and these fall into household income band £150,000 or Over making up 1.16 %. When using your base as a comparison, most households fall into the income band £20,000 to £29,999 which makes up 18.87 % of the overall view. When using index* figures as a guide we can see that the income band £70,000 to £99,999 is over represented making up 13.04 % with an index of 157, the most under represented banding is £150,000 or Over with a figure of 55 making up 1.16 % of the distribution.

Index* - An index of 100 indicates that the variable shown is represented to the same degree in the target area as it is in the base area. An index of 200 would show that it has twice the representation.

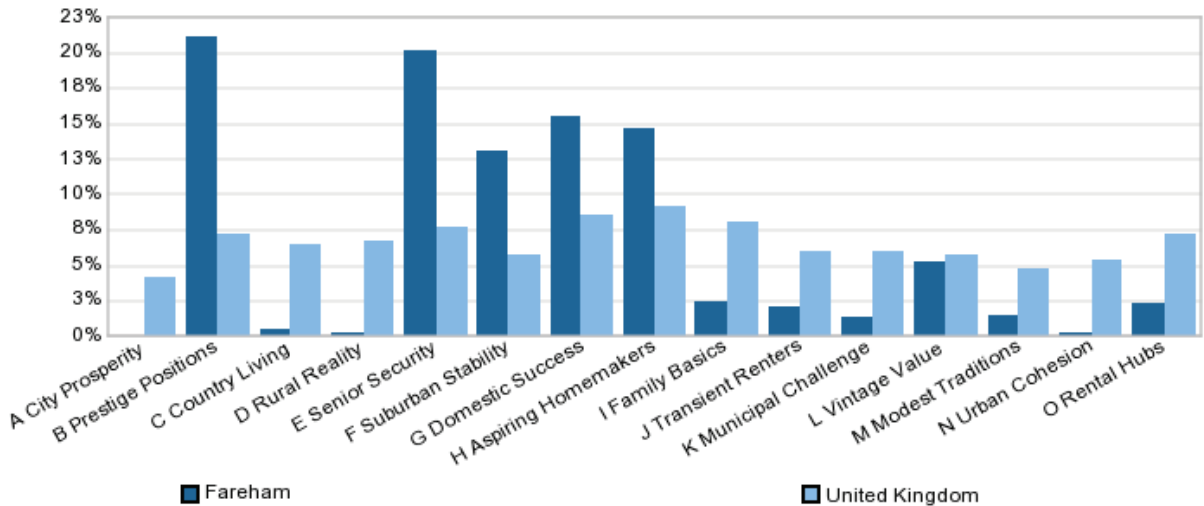
Understanding the residential profile by Mosaic UK 6

Mosaic UK 6 classifies all consumers in the United Kingdom by allocating them to one of 15 Groups and 66 Types. The 15 Groups are shown below as a profile using the Population data from your target area. The groups, types and the supporting descriptive information paint a detailed picture of UK consumers in terms of their socio-economic and socio-cultural behaviour.

Mosaic UK 6 Group	Area	Base	Index	0	100	307
A City Prosperity	2	2,770,370	0			
B Prestige Positions	24,574	4,803,854	292			
C Country Living	512	4,359,823	7			
D Rural Reality	233	4,519,380	3			
E Senior Security	23,488	5,117,591	262			
F Suburban Stability	15,233	3,884,529	224			
G Domestic Success	18,128	5,705,246	182			
H Aspiring Homemakers	17,033	6,118,369	159			
I Family Basics	2,853	5,316,990	31			
J Transient Renters	2,309	3,970,981	33			
K Municipal Challenge	1,509	4,027,620	21			
L Vintage Value	5,984	3,824,575	89			
M Modest Traditions	1,720	3,150,525	31			
N Urban Cohesion	317	3,595,280	5			
O Rental Hubs	2,613	4,833,973	31			
Totals	116,737	66,745,948				

Source: Experian Mosaic UK 6 Classification (2017).

Chart explanation: The chart above represents the index* value. This indicates the over or under representation of the area selection relative to the base.



The largest group is B Prestige Positions with a count of 24,574 representing 21.05 % of the overall distribution, in comparison to the base where 7.20 % fall into this group. The smallest group is A City Prosperity with a count of 2 which represents 0.00 %. The index* figures indicate that the most over represented group is B Prestige Positions taking up 21.05 % of the target area. In contrast the most under represented group is A City Prosperity with just 0.00 %.

*An index of 100 indicates that the variable shown is represented to the same degree in the target area as it is in the base area. An index of 200 would show that it has twice the representation.

Understanding the top three Mosaic UK 6 Groups

B Prestige Positions - 21.05 %



Established families in large detached homes living upmarket lifestyles.

Key Features

- High value detached homes
- Married couples
- Managerial and senior positions
- Supporting students and older children
- High assets and investments
- Online shopping and banking

E Senior Security - 20.12 %



Elderly people with assets who are enjoying a comfortable retirement.

Key Features

- Elderly singles and couples
- Homeowners
- Comfortable homes
- Additional pensions above state
- Don't like new technology
- Low mileage drivers

G Domestic Success - 15.53 %



Thriving families who are busy bringing up children and following careers.

Key Features

- Families with children
- Upmarket suburban homes
- Owned with a mortgage
- 3 or 4 bedrooms
- High Internet use
- Own new technology

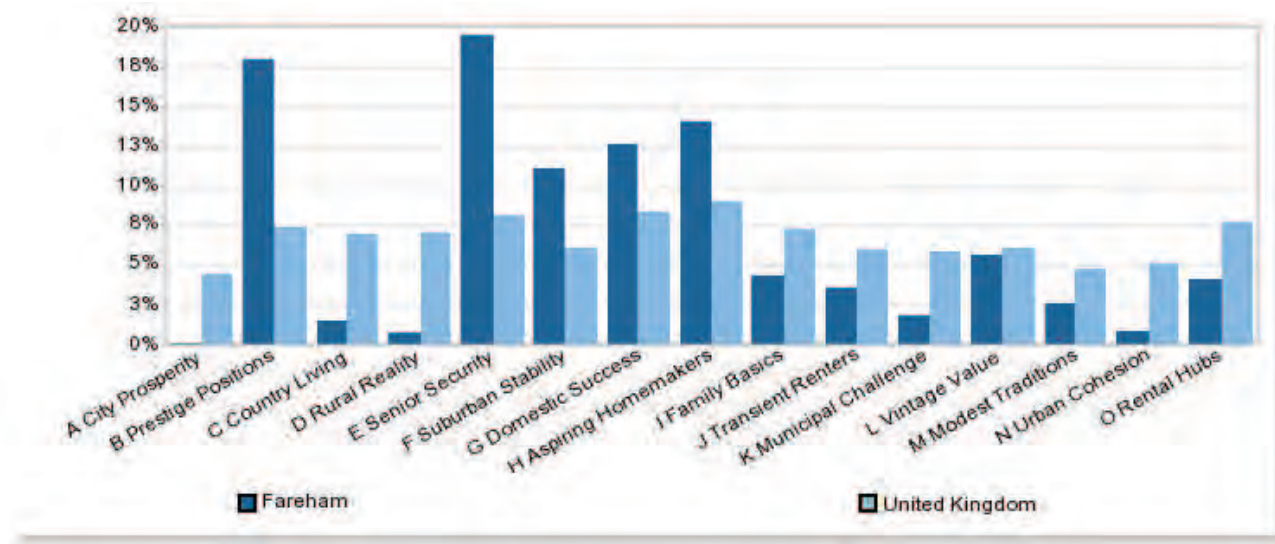
What is the daytime population profile by Mosaic UK 6?

Mosaic UK 6 classifies all consumers in the United Kingdom by allocating them to one of 15 Groups and 66 Types. The 15 Groups are shown below as a profile using data for Adults 16+ in your target area. The groups, types and the supporting descriptive information paint a detailed picture of UK consumers in terms of their socio-economic and socio-cultural behaviour.

Mosaic UK 6 Group	Area	Base	Index	0	100	254
A City Prosperity	119	2,332,028	3	<div style="width: 3%;"></div>		
B Prestige Positions	16,318	3,931,608	243	<div style="width: 243%;"></div>		
C Country Living	1,297	3,669,149	21	<div style="width: 21%;"></div>		
D Rural Reality	622	3,730,806	10	<div style="width: 10%;"></div>		
E Senior Security	17,796	4,372,553	238	<div style="width: 238%;"></div>		
F Suburban Stability	10,112	3,214,767	184	<div style="width: 184%;"></div>		
G Domestic Success	11,509	4,464,352	151	<div style="width: 151%;"></div>		
H Aspiring Homemakers	12,795	4,820,440	155	<div style="width: 155%;"></div>		
I Family Basics	3,916	3,866,269	59	<div style="width: 59%;"></div>		
J Transient Renters	3,289	3,182,472	60	<div style="width: 60%;"></div>		
K Municipal Challenge	1,614	3,113,515	30	<div style="width: 30%;"></div>		
L Vintage Value	5,115	3,216,723	93	<div style="width: 93%;"></div>		
M Modest Traditions	2,352	2,558,990	54	<div style="width: 54%;"></div>		
N Urban Cohesion	722	2,735,092	15	<div style="width: 15%;"></div>		
O Rental Hubs	3,707	4,131,300	52	<div style="width: 52%;"></div>		
Totals	91,283	53,340,064				

Source: Experian Mosaic UK 6 Daytime Classification (2017).

Chart explanation: The chart above represents the index* value. This indicates the over or under representation of the area selection relative to the base.



The largest group is E Senior Security with a count of 17,796 representing 19.50 % of the overall distribution, in comparison to the base where 8.20 % fall into this group. The smallest group is A City Prosperity with a count of 119 which represents 0.13 %. The index* figures indicate that the most over represented group is B Prestige Positions taking up 17.88 % of the target area. In contrast the most under represented group is A City Prosperity with just 0.13 %.

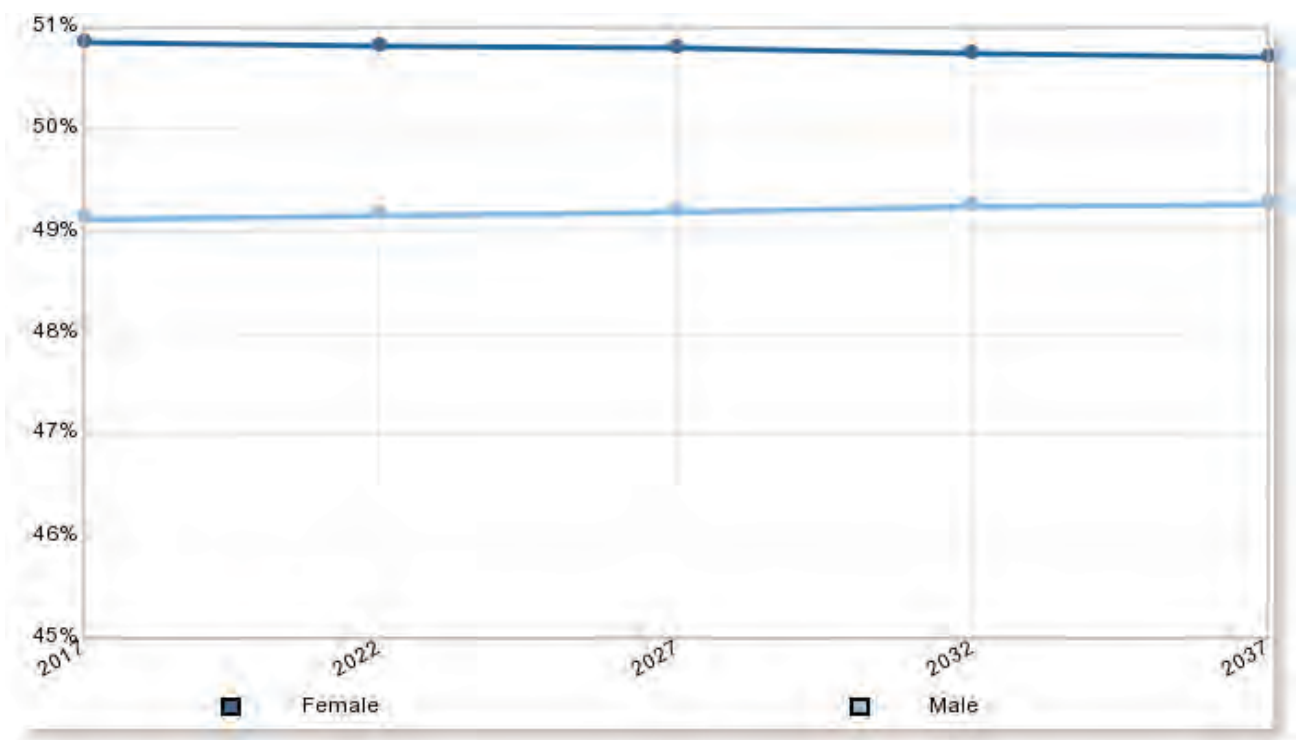
*An index of 100 indicates that the variable shown is represented to the same degree in the target area as it is in the base area. An index of 200 would show that it has twice the representation.

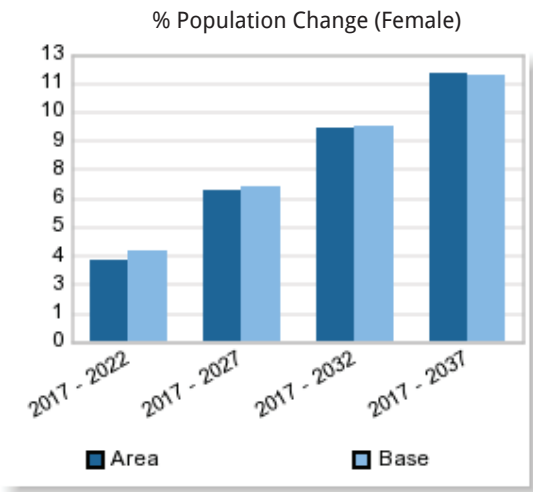
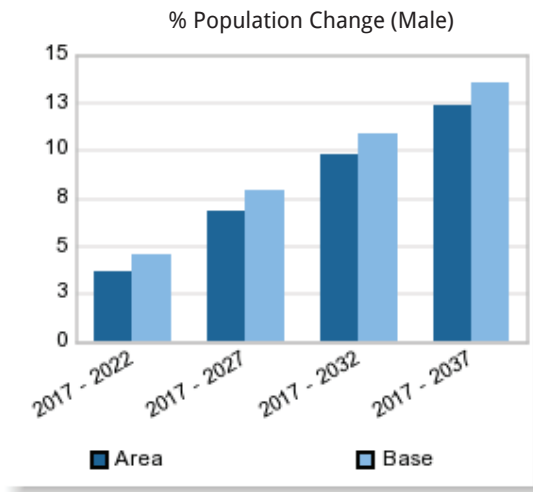
Will the population of the area grow or decline?

Population Projection	Area	% Change since 2017	Base	% Change since 2017
Population projection 2022	120,974		69,582,712	
Female Population projection 2022	61,492		35,148,021	
Male Population projection 2022	59,482		34,434,691	
Projected change from 2017	4,237	3.63	2,836,764	4.25
Population projection 2027	124,579		71,637,467	
Female Population projection 2027	63,281		36,107,308	
Male Population projection 2027	61,298		35,530,159	
Projected change from 2017	7,842	6.72	4,891,519	7.33
Population projection 2032	127,870		73,477,112	
Female Population projection 2032	64,900		36,970,150	
Male Population projection 2032	62,970		36,506,962	
Projected change from 2017	11,133	9.54	6,731,164	10.08
Population projection 2037	130,805		75,117,457	
Female Population projection 2037	66,338		37,732,889	
Male Population projection 2037	64,467		37,384,568	
Projected change from 2017	14,068	12.05	8,371,509	12.54

Source: Experian Population Projections (2017).

% Population Change by Gender





For 2017 the total population estimate is 116,737, this is divided into 49.14 % male and 50.86 % female. By 2022 the population is expected to have changed to 120,974, this is a projected change of 3.63 % over five years, and the gender split is predicted to be 50.83 % female and 49.17 % male. In the five years to 2027 the population is estimated to change to 124,579, this is a further 2.98 % change, and is expected to be divided into 50.80 % female and 49.20 % male. By 2032 the population is expected to be 127,870, a further change of 2.64 %, and split into 50.75 % female and 49.25 % male. By 2037 the population is expected to be 130,805, a change of 2.30 %, and divided into 50.72 % female and 49.28 % male.

Population change is an important element in fluctuations in consumer demand. Our population projections give a valuable insight into future demand in local areas, enabling you to predict future business performance, and plan accordingly.

The data is particularly useful if you are targeting specific age/gender ranges - for example, child care nurseries can find sites where the number of children is set to increase, and football clubs can target areas expecting growth in the number of teenagers.

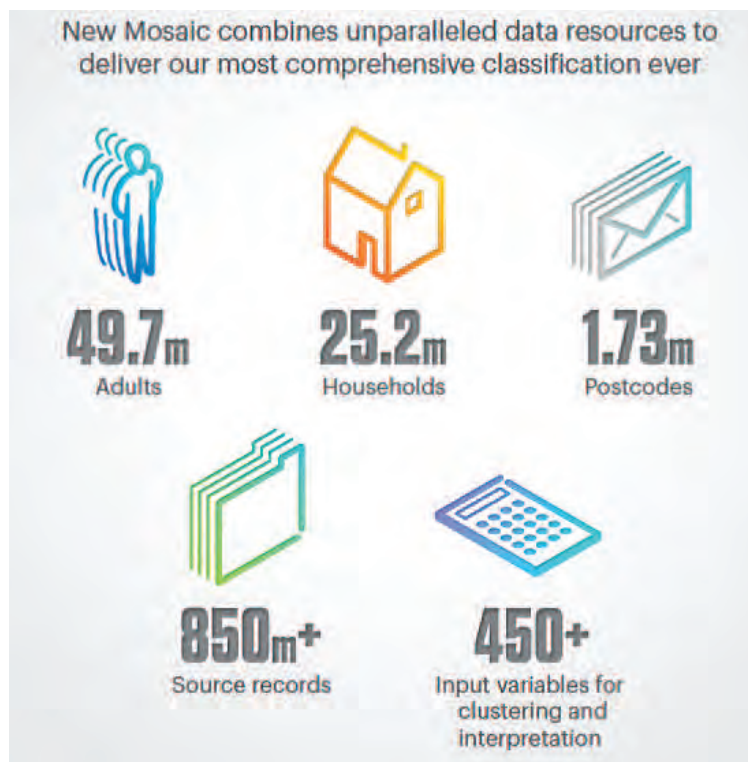
Projections of residential population are available for each year from 2018 to 2037 . These are split by gender and 18 age bands.

Mosaic UK 6

72 per cent of the information used to build Mosaic UK 6 is sourced from a combination of data that includes Experian's UK ConsumerView Database, which provides consumer demographic information for the UK's 50 million adults and 25 million households. This database is built from an unrivalled variety of privacy-compliant public and Experian proprietary data and statistical models. These include the edited Electoral Roll, Council Tax property valuations, house sale prices, self-reported lifestyle surveys, term time students from HESA, social housing information from NROSH, broadband speed information from OFCOM, and other compiled consumer data.

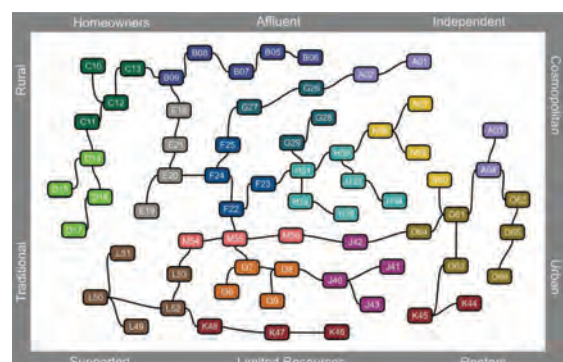
The remaining 28 per cent of the data are sourced from the 2011 Census which provides highly accurate neighbourhood level information.

All of the information used to build Mosaic is continuously updated. This enables Experian to verify and update the classification annually, and the segmentation has been built in such a way that new data can be added to provide further insight into the types.



The Mosaic UK 6 Family Tree

The Mosaic UK 6 family tree illustrates the major demographic and lifestyle polarities between the groups and types, and shows how the Mosaic types relate to each other.





Mosaic UK 6 Daytime provides small area estimates of the daytime population. This provides valuable information for retailers who rely on the surrounding 'weekday daytime population' for a significant proportion of their trade.

2014 mid-year estimates are available for each United Kingdom Output Area (OA) and Postal Sector. In addition, estimates are provided split down by the (residential) Mosaic UK 6 groups and types. This allows existing Mosaic UK 6 profiles of products and services to be combined with the 'small area' Mosaic UK 6 Daytime population profiles to estimate market sizes.

Mosaic UK 6 Daytime is created using the following key inputs:

- Experian's 2014 mid-year estimates of residential population at OA level.
- 2011 Census Origin-Destination (O-D) data relating to travel to work (and place of study for Scotland) at OA-to-OA level.
- See Travel to work questions asked across UK.

The Experian 2014 mid-year population estimates are split into sub-groups compatible with the 2011 Census O-D data, for example:

- All people aged 16-74 in employment (not including full-time students).
- All people aged 16-74 in employment (including full-time students).

For each sub-group, it is determined whether they are most likely to be:

- Located somewhere outside their home (or residential OA) during the day, or
- At home (or residential OA) during the day.

This takes into account the OA-to-OA 'Travel to Work' 2011 Census data.

For sub-groups which are likely to be away from home during the day, and where sufficient 2011 Census data on travel patterns exists, a reallocation from 'Origin OAs' to 'Destination OAs' is undertaken. The OA level Mosaic UK 6 Profile of the 2014 population sub-group is allocated to each 'Destination OA' using probabilities derived from the 2011 Census O-D data. These estimated flows are then aggregated to 'Destination OA' level to create the OA level data. Finally, data is accumulated from OA level to Postal Sector level to create the Postal Sector level dataset.

Census Data 2011

The Census is a government survey which is conducted every 10 years and covers the whole country. The information is collected on a single day. The government use the information to plan what local infrastructure is required in the future such as schools and hospitals.

Each decade the release of Census data for the UK provides analysts with a wealth of information that allows a rich and detailed picture to be created for each local area within the country. The most recent Census for the UK in 2011 covered a broad range of topics including population, households, employment, qualification, ethnicity and health.

A deep understanding of the demographics and socio-demographics of areas as diverse as neighbourhoods, store catchment areas, and sales or distribution territories can be gained by profiling and analysing suitable Census variable and can provide insight to help underpin decision making across a wide variety of sectors.

Census 2011 Current Year Estimates

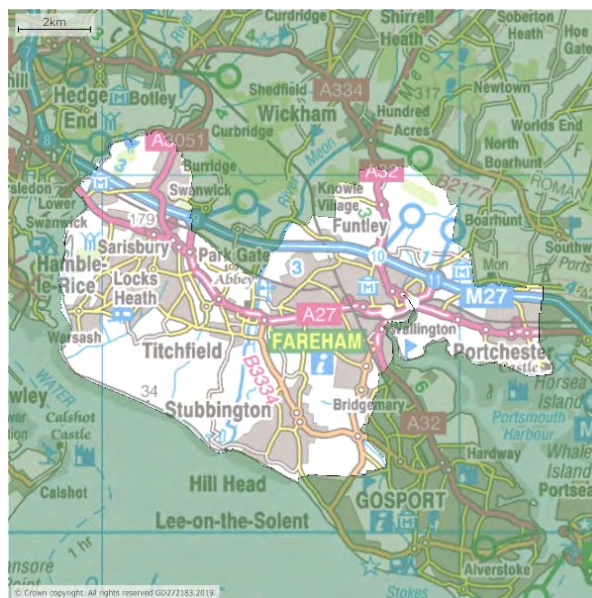
Recognising the Complexity of the Census and of modelling Census data, a range of methods and of other input data has been used to predict the amount of change since Census Day and to therefore create Census Current Year Estimates for these tables. For many of the Census tables modelled, more than one underlying method has been used, with final results being created via the weighted combination of the separate method results. This multi-model approach recognises the strengths and weaknesses of each underlying approach used. As such, it draws strength from the underlying separate methods in order to maximize accuracy.

Key non-Census input data used includes Government mid-year estimates of population by age by gender, other Government Open data sources including results of key surveys and reports such as the OND 'Families and Households' report, HM Land Registry information, Experian Economics estimates and projections, variables from Experian's ConsumerView database and variables that underpin Experian's Mosaic UK classification. The Experian '2011 Census-based Current Year Estimates' database has been designed to be one of a family of Experian '2011 Census and 2011 Census-based' databases. This family of databases provides views at different point in time of a range of UK-wide Local Area Data estimates of key demographics and socio-demographics.

Appendix 6
NOMIS Office for National Statistics 2017
Job Categories by Industry

Labour Market Profile - Fareham

The profile brings together data from several sources. Details about these and related terminology are given in the definitions section.



Resident Population

Total population (2018)

	Fareham (Numbers)	South East (Numbers)	Great Britain (Numbers)
All People	116,300	9,133,600	64,553,900
Males	56,900	4,500,300	31,864,000
Females	59,500	4,633,300	32,689,900

Source: ONS Population estimates - local authority based by five year age band

Population aged 16-64 (2018)

	Fareham (Numbers)	Fareham (%)	South East (%)	Great Britain (%)
All People Aged 16-64	69,500	59.8	61.5	62.7
Males Aged 16-64	34,500	60.6	62.2	63.4
Females Aged 16-64	35,000	58.8	60.8	62.0

Source: ONS Population estimates - local authority based by five year age band

Notes: % is a proportion of total population

Labour Supply

Employment and unemployment (Apr 2018-Mar 2019)

	Fareham (Numbers)	Fareham (%)	South East (%)	Great Britain (%)
All People				
Economically Active†	57,300	79.8	81.1	78.7
In Employment†	56,400	79.2	78.4	75.4
Employee‡	49,600	70.0	66.2	64.4
Self Employed‡	6,100	8.2	11.9	10.7
Unemployed (Model-Based)§	1,600	2.8	3.3	4.1
Males				
Economically Active†	32,500	89.4	85.3	83.5
In Employment†	32,000	89.4	82.6	79.9
Employee‡	28,900	80.3	67.0	65.5
Self Employed‡	#	#	15.3	14.2
Unemployed§	!	!	3.1	4.2
Females				
Economically Active†	24,800	70.0	77.0	73.9
In Employment†	24,400	68.8	74.2	70.8
Employee‡	20,800	59.5	65.4	63.4
Self Employed‡	#	#	8.5	7.2
Unemployed§	!	!	3.4	4.1

Source: ONS annual population survey

Sample size too small for reliable estimate

! Estimate is not available since sample size is disclosive

† - numbers are for those aged 16 and over, % are for those aged 16-64

§ - numbers and % are for those aged 16 and over. % is a proportion of economically active

Economic inactivity (Apr 2018-Mar 2019)

	Fareham (Level)	Fareham (%)	South East (%)	Great Britain (%)
All People				
Total	13,900	20.2	18.9	21.3
Student	6,100	43.9	26.8	26.8
Looking After Family/Home	#	#	24.1	23.6
Temporary Sick	!	!	1.5	1.9
Long-Term Sick	#	#	18.9	22.9
Discouraged	!	!	#	0.4
Retired	#	#	15.6	13.1
Other	#	#	12.9	11.3
Wants A Job	#	#	22.0	20.6
Does Not Want A Job	11,400	81.4	78.0	79.4

Source: ONS annual population survey

Sample size too small for reliable estimate

! Estimate is not available since sample size is disclosive

Notes: numbers are for those aged 16-64.

% is a proportion of those economically inactive, except total, which is a proportion of those aged 16-64

Workless Housholds (Jan-Dec 2018)

	Fareham	South East	Great Britain
Number Of Workless Households	#	320,500	2,919,800
Percentage Of Households That Are Workless	#	11.4	14.3
Number Of Children In Workless Households	#	105,200	1,259,000
Percentage Of Children Who Are In Households That Are Workless	#	6.0	10.3

Source: ONS annual population survey - households by combined economic activity status

Sample size too small for reliable estimate

Notes: Only includes those households that have at least one person aged 16 to 64.
Children refers to all children aged under 16.

Employment by occupation (Apr 2018-Mar 2019)

	Fareham (Numbers)	Fareham (%)	South East (%)	Great Britain (%)
Soc 2010 Major Group 1-3	28,000	49.6	51.2	46.8
1 Managers, Directors And Senior Officials	7,700	13.6	12.3	10.9
2 Professional Occupations	11,400	20.2	22.6	20.9
3 Associate Professional & Technical	8,900	15.8	16.2	14.8
Soc 2010 Major Group 4-5	11,600	20.6	19.7	20.1
4 Administrative & Secretarial	7,900	14.0	10.3	9.9
5 Skilled Trades Occupations	#	#	9.4	10.1
Soc 2010 Major Group 6-7	6,400	11.4	15.7	16.5
6 Caring, Leisure And Other Service Occupations	#	#	8.8	9.0
7 Sales And Customer Service Occs	#	#	6.9	7.4
Soc 2010 Major Group 8-9	10,400	18.4	13.4	16.6
8 Process Plant & Machine Operatives	4,200	7.4	4.7	6.3
9 Elementary Occupations	6,200	11.0	8.7	10.3

Source: ONS annual population survey

Sample size too small for reliable estimate

Notes: Numbers and % are for those of 16+
% is a proportion of all persons in employment

Qualifications (Jan 2018-Dec 2018)

	Fareham (Level)	Fareham (%)	South East (%)	Great Britain (%)
NVQ4 And Above	27,400	39.7	42.2	39.3
NVQ3 And Above	42,000	60.9	61.8	57.8
NVQ2 And Above	55,800	80.9	78.9	74.9
NVQ1 And Above	62,600	90.7	89.2	85.4
Other Qualifications	5,100	7.4	5.2	6.8
No Qualifications	#	#	5.6	7.8

Source: ONS annual population survey

Sample size too small for reliable estimate

Notes: For an explanation of the qualification levels see the definitions section.

Numbers and % are for those of aged 16-64

% is a proportion of resident population of area aged 16-64

Local authority profile for Fareham

Earnings by place of residence (2018)

	Fareham (Pounds)	South East (Pounds)	Great Britain (Pounds)
Gross Weekly Pay			
Full-Time Workers	615.4	614.5	571.1
Male Full-Time Workers	713.6	670.8	612.2
Female Full-Time Workers	538.7	541.9	510.0
Hourly Pay - Excluding Overtime			
Full-Time Workers	16.29	15.65	14.36
Male Full-Time Workers	19.01	16.61	14.89
Female Full-Time Workers	14.51	14.43	13.56

Source: ONS annual survey of hours and earnings - resident analysis

Notes: Median earnings in pounds for employees living in the area.

Out-Of-Work Benefits

Under Universal Credit a broader span of claimants are required to look for work than under Jobseeker's Allowance. As Universal Credit Full Service is rolled out in particular areas, the number of people recorded as being on the Claimant Count is therefore likely to rise.

Claimant count by sex - not seasonally adjusted (August 2019)

	Fareham (Numbers)	Fareham (%)	South East (%)	Great Britain (%)
All People	715	1.0	1.9	2.8
Males	395	1.1	2.2	3.3
Females	320	0.9	1.6	2.4

Source: ONS Claimant count by sex and age

Note: % is the number of claimants as a proportion of resident population of area aged 16-64 and gender

Claimant count by age - not seasonally adjusted (August 2019)

	Fareham (Level)	Fareham (%)	South East (%)	Great Britain (%)
Aged 16+	715	1.0	1.9	2.8
Aged 16 To 17	5	0.2	0.1	0.3
Aged 18 To 24	145	1.8	2.6	3.9
Aged 18 To 21	100	2.2	2.8	4.2
Aged 25 To 49	360	1.1	2.0	3.0
Aged 50+	210	0.9	1.6	2.4

Source: ONS Claimant count by sex and age

Note: % is number of claimants as a proportion of resident population of the same age

Working-age client group - main benefit claimants - not seasonally adjusted (November 2016) [Discontinued]

	Fareham (Numbers)	Fareham (%)	South East (%)	Great Britain (%)
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Local authority profile for Fareham

Total Claimants	4,240	6.1	8.3	11.0
By Statistical Group				
Job Seekers	260	0.4	0.7	1.1
ESA And Incapacity Benefits	2,350	3.4	4.4	6.1
Lone Parents	310	0.4	0.8	1.0
Carers	680	1.0	1.3	1.7
Others On Income Related Benefits	60	0.1	0.1	0.2
Disabled	440	0.6	0.8	0.8
Bereaved	140	0.2	0.2	0.2
Main Out-Of-Work Benefits†	2,980	4.3	6.1	8.4

Source: DWP benefit claimants - working age client group

† Main out-of-work benefits includes the groups: job seekers, ESA and incapacity benefits, lone parents and others on income related benefits. See the Definitions and Explanations below for details

Notes: % is a proportion of resident population of area aged 16-64

Figures in this table do not yet include claimants of Universal Credit

Labour Demand

Jobs density (2017)

	Fareham (Jobs)	Fareham (Density)	South East (Density)	Great Britain (Density)
Jobs Density	58,000	0.83	0.87	0.86

Source: ONS jobs density

Notes: The density figures represent the ratio of total jobs to population aged 16-64.

Total jobs includes employees, self-employed, government-supported trainees and HM Forces

Employee jobs (2017)

	Fareham (Employee Jobs)	Fareham (%)	South East (%)	Great Britain (%)
Total Employee Jobs	48,000	-	-	-
Full-Time	31,000	64.6	66.2	67.5
Part-Time	18,000	37.5	33.8	32.5

Employee Jobs By Industry

B : Mining And Quarrying	10	0.0	0.0	0.2
C : Manufacturing	4,000	8.3	6.2	8.2
D : Electricity, Gas, Steam And Air Conditioning Supply	20	0.0	0.5	0.5
E : Water Supply; Sewerage, Waste Management And Remediation Activities	300	0.6	0.8	0.7
F : Construction	3,000	6.2	5.5	4.8
G : Wholesale And Retail Trade; Repair Of Motor Vehicles And Motorcycles	8,000	16.7	16.3	15.2
H : Transportation And Storage	3,000	6.2	4.6	4.7
I : Accommodation And Food Service Activities	3,000	6.2	7.3	7.5
J : Information And Communication	2,000	4.2	5.9	4.4
K : Financial And Insurance Activities	1,500	3.1	2.8	3.5
L : Real Estate Activities	700	1.5	1.6	1.7

Local authority profile for Fareham

M : Professional, Scientific And Technical Activities	3,000	6.2	8.0	8.4
N : Administrative And Support Service Activities	4,000	8.3	8.7	9.1
O : Public Administration And Defence; Compulsory Social Security	3,500	7.3	3.2	4.3
P : Education	5,000	10.4	10.4	8.9
Q : Human Health And Social Work Activities	6,000	12.5	12.7	13.3
R : Arts, Entertainment And Recreation	1,000	2.1	2.7	2.6
S : Other Service Activities	1,250	2.6	2.5	2.0

Source: ONS Business Register and Employment Survey : open access

- Data unavailable

Notes: % is a proportion of total employee jobs excluding farm-based agriculture

Employee jobs excludes self-employed, government-supported trainees and HM Forces

Data excludes farm-based agriculture

Earnings by place of work (2018)

	Fareham (Pounds)	South East (Pounds)	Great Britain (Pounds)
Gross Weekly Pay			
Full-Time Workers	568.3	589.2	570.9
Male Full-Time Workers	644.5	635.0	611.8
Female Full-Time Workers	528.8	521.7	509.8
Hourly Pay - Excluding Overtime			
Full-Time Workers	14.65	14.91	14.35
Male Full-Time Workers	15.08	15.70	14.88
Female Full-Time Workers	14.42	13.85	13.55

Source: ONS annual survey of hours and earnings - workplace analysis

Notes: Median earnings in pounds for employees working in the area.

Civil service jobs as a proportion of employee jobs (2018)

	Fareham (Headcount)	Fareham (%)	South East (%)	Great Britain (%)
Total civil service jobs	2,440	4.9	0.9	1.5
Full-time	1,080	2.2	0.7	1.1
Part-time	1,360	2.7	0.2	0.3

Source: ONS Annual Civil Service Employment Survey

Note: Percentages based on % of total jobs in area that are civil service jobs

Composition of civil service jobs by sex and hours worked (2018)

	Fareham (Headcount)	Fareham (%)	South East (%)	Great Britain (%)
Total civil service jobs	2,440	-	-	-
Full-time	1,080	44.3	77.4	76.9
Part-time	1,360	55.7	22.6	23.1
Male	1,160	47.5	49.8	45.7
Full-time	560	23.0	44.6	41.5
Part-time	590	24.2	5.2	4.2
Female	1,290	52.9	50.2	54.3

Local authority profile for Fareham

Full-time	520	21.3	32.8	35.4
Part-time	770	31.6	17.4	18.9

Source: ONS Annual Civil Service Employment Survey

Note: Percentages based on % of Total Civil Service Jobs made up of each category

Businesses

UK Business Counts (2018)

	Fareham (Numbers)	Fareham (%)	South East (Numbers)	South East (%)
Enterprises				
Micro (0 To 9)	3,940	88.4	363,890	89.9
Small (10 To 49)	435	9.8	33,090	8.2
Medium (50 To 249)	70	1.6	6,035	1.5
Large (250+)	10	0.2	1,535	0.4
Total	4,455	-	404,555	-
Local Units				
Micro (0 To 9)	4,365	82.8	398,835	85.4
Small (10 To 49)	750	14.2	55,365	11.9
Medium (50 To 249)	140	2.7	11,340	2.4
Large (250+)	20	0.4	1,620	0.3
Total	5,270	-	467,160	-

Source: Inter Departmental Business Register (ONS)

Note: % is as a proportion of total (enterprises or local units)

Definitions And Explanations

Resident Population

The estimated population of an area includes all those usually resident in the area, whatever their nationality. HM Forces stationed outside the United Kingdom are excluded but foreign forces stationed here are included. Students are taken to be resident at their term-time address.

Labour Supply

Labour supply consists of people who are employed, as well as those people defined as unemployed or economically inactive, who can be considered to be potential labour supply. Information in this section relates to the characteristics of people living in an area.

Most labour supply data comes from the Annual Population Survey (APS). The APS is the largest regular household survey in the United Kingdom. It includes data from the Labour Force Survey (LFS), plus further sample boosts in England, Wales and Scotland. The survey includes data from a sample of around 256,000 people aged 16 and over.

As APS estimates are based on samples, they are subject to sampling variability. This means that if another sample for the same period were drawn, a different estimate might be produced. In general, the larger the number of people in a sample, the smaller the variation between estimates. Estimates for smaller areas such as

Local authority profile for Fareham

local authorities are therefore less reliable than those for larger areas such as regions. When the sample size is too small to produce reliable estimates, the estimates are replaced with a #.

Economically Active

Economically Active

People who are either in employment or unemployed.

Economic Activity Rate

People, who are economically active, expressed as a percentage of all people.

In Employment

People who did some paid work in the reference week (whether as an employee or self employed); those who had a job that they were temporarily away from (eg, on holiday); those on government-supported training and employment programmes; and those doing unpaid family work.

Employment Rate

The number of people in employment expressed as a percentage of all people aged 16-64.

Employees And Self Employed

The division between employees and self employed is based on survey respondents' own assessment of their employment status. The percentage show the number in each category as a percentage of all people aged 16-64. The sum of employees and self employed will not equal the in employment figure due to the inclusion of those on government-supported training and employment programmes, and those doing unpaid family work in the latter.

Unemployed

Refers to people without a job who were available to start work in the two weeks following their interview and who had either looked for work in the four weeks prior to interview or were waiting to start a job they had already obtained.

Model-Based Unemployed

As unemployed form a small percentage of the population, the APS unemployed estimates within local authorities are based on very small samples so for many areas would be unreliable. To overcome this ONS has developed a statistical model that provides better estimates of total unemployed for unitary authorities and local authority districts (unemployment estimates for counties are direct survey estimates). Model-based estimates are not produced for male or female unemployed.

The model-based estimate improves on the APS estimate by *borrowing strength* from the Claimant Count to produce an estimate that is more precise (i.e. has a smaller confidence interval). The number of people measured by the Claimant Count is not itself a measure of unemployment but is strongly correlated with unemployment, and, as it is an administrative count, is known without sampling error. The gain in precision is greatest for areas with smaller sample sizes.

Unemployment Rate

Unemployed as a percentage of the economically active population.

Economically Inactive

Economically Inactive

People who are neither in employment nor unemployed. This group includes, for example, all those who were looking after a home or retired.

Wanting A Job

People not in employment who want a job but are not classed as unemployed because they have either not sought work in the last four weeks or are not available to start work.

Not Wanting A Job

People who are neither in employment nor unemployed and who do not want a job.

Workless Households

Households

A household is defined as a single person, or a group of people living at the same address who have the address as their only or main residence and either share one main meal a day or share living accommodation (or both). For the purposes of this table, estimates only include those households where at least 1 person is aged 16 to 64.

Workless Households

Households where no-one aged 16 or over is in employment. These members may be unemployed or economically inactive. Economically inactive members may be unavailable to work because of family

Local authority profile for Fareham

commitments, retirement or study, or unable to work through sickness or disability.

Children

Children refers to all children under 16.

Occupation

Occupations are classified according to the Standard Occupation Classification 2010. Descriptions of the job titles included in each code are available in the [SOC manuals](#).

Qualifications

Qualifications data are only be available from the APS for calendar year periods, for example, Jan to Dec 2005. The variables show the total number of people who are qualified at a particular level and above, so data in this table are not additive. Separate figures for each NVQ level are available in the full Annual Population Survey data set (Query data).

The trade apprenticeships are split 50/50 between NVQ level 2 and 3. This follows ONS policy for presenting qualifications data in publications. Separate counts for trade apprenticeships can be obtained from the full APS data set (Query data).

No Qualifications

No formal qualifications held.

Other Qualifications

includes foreign qualifications and some professional qualifications.

NVQ 1 Equivalent

e.g. fewer than 5 GCSEs at grades A-C, foundation GNVQ, NVQ 1, intermediate 1 national qualification (Scotland) or equivalent.

NVQ 2 Equivalent

e.g. 5 or more GCSEs at grades A-C, intermediate GNVQ, NVQ 2, intermediate 2 national qualification (Scotland) or equivalent.

NVQ 3 Equivalent

e.g. 2 or more A levels, advanced GNVQ, NVQ 3, 2 or more higher or advanced higher national qualifications (Scotland) or equivalent.

NVQ 4 Equivalent And Above

e.g. HND, Degree and Higher Degree level qualifications or equivalent.

Earnings By Residence

The figures show the median earnings in pounds for employees living in the area who are on adults rates of pay and whose pay was not affected by absence. Figures for earnings come from the Annual Survey of Hours and Earnings (ASHE). The ASHE is based on a 1 per cent sample of employees, information on whose earnings and hours is obtained from employers. The survey does not cover self-employed. Information relates to a pay period in April.

The earnings information collected relates to gross pay before tax, national insurance or other deductions, and excludes payments in kind. It is restricted to earnings relating to the survey pay period and so excludes payments of arrears from another period made during the survey period; any payments due as a result of a pay settlement but not yet paid at the time of the survey will also be excluded.

Out-Of-Work Benefits

Claimant Count (Experimental Statistics)

The Claimant Count is the number of people claiming benefit principally for the reason of being unemployed. This is measured by combining the number of people claiming Jobseeker's Allowance (JSA) and National Insurance credits with the number of people receiving Universal Credit principally for the reason of being unemployed. Claimants declare that they are out of work, capable of, available for and actively seeking work during the week in which the claim is made.

The measure of the number of people receiving Universal Credit principally for the reason of being unemployed is still being developed by the Department for Work and Pensions. Consequently this component of the total Claimant Count does not yet correctly reflect the target population of unemployed claimants and is subject to revisions. For this reason the Claimant Count is currently designated as Experimental Statistics.

The Claimant Count is mostly derived from DWP administrative systems. For various reasons, e.g. a claimant's National Insurance number is not known, a small number of claims have to be dealt with manually. These clerical claims do not have as much detail as the computerised claims and therefore, whilst part of the claimant count by sex table, cannot be included the age breakdown.

Rates By Age

Unemployment benefits normally only apply to people aged 18 years and over. They can only be claimed by 16 and 17 year olds in exceptional circumstances. Consequently the counts for this age group are typically very low.

DWP Working-Age Client Group

From August 2017 DWP discontinued this dataset when they changed the way they publish their benefit statistics. The last period of data is the November 2016 figures published in May 2017.

The number of working-age people who are claiming one or more main DWP benefits. The main benefits are: bereavement benefit, carer's allowance, disability living allowance, ESA and incapacity benefit, severe disablement allowance, income support, jobseeker's allowance, and widow's benefit. The age at which women reach State Pension age is gradually increasing from 60 to 65 between April 2010 and April 2020. Throughout this period, only women below State Pension age are counted as working age benefit claimants."

The total count is broken down by statistical groups. These categorise each person according to the main reason why they are claiming benefit. Each client is classified to a single group.

Benefits are arranged hierarchically and claimants are assigned to a group according to the top most benefit they receive. Thus a person who is a lone parent and receives Incapacity Benefit would be classified as incapacity benefits. Consequently, the group lone parent will not contain all lone parents as some will be included in the incapacity benefits group and Job seekers groups.

Main out-of-work benefits consists of the groups: job seekers, ESA and incapacity benefits, lone parents and others on income related benefits.

These groups have been chosen to best represent a count of all those benefit recipients who cannot be in full-time employment as part of their condition of entitlement. Those claiming solely Bereavement Benefits or Disability Living Allowance (DLA) are not included as these are not out-of-work or income based benefits. DLA is paid to those needing help with personal care. These people can, and some will, be in full-time employment. If DLA claimants are also in receipt of JSA, IS, ESA or Incapacity Benefits in addition to DLA they will be counted under the relevant statistical group. In addition, we exclude those claiming solely carer's benefits or claiming carer's benefits alongside income support, as DWP does not pursue active labour market policies for this group. Carers benefits are paid to those with full time caring responsibilities. The group entitled to Carer's benefits alongside Income Support (IS) includes around 86,000 claimants and has been stable over time.

This Nomis series is different to that published in the Office for National Statistics (ONS) Labour Market Bulletin. The Nomis series uses DWP Jobseeker's Allowance numbers, whilst the Labour Market Bulletin uses the Claimant Count, using different methods, coverage and reference periods

Labour Demand

Labour demand includes jobs available within the area.

Jobs Density

The level of jobs per resident aged 16-64. For example, a job density of 1.0 would mean that there is one job for every resident aged 16-64.

The total number of jobs is a workplace-based measure and comprises employee jobs, self-employed, government-supported trainees and HM Forces. The number of residents aged 16-64 figures used to calculate jobs densities are based on the relevant mid-year population estimates.

Employee Jobs

The number of jobs held by employees. Employee jobs excludes self-employed, government-supported trainees and HM Forces, so this count will be smaller than the total jobs figure shown in the Jobs density table. The information comes from the Business Register and Employment Survey (BRES) - an employer survey conducted in September of each year. The BRES records a job at the location of an employee's workplace (rather than at the location of the business's main office).

Full-Time And Part-Time:

In the BRES, part-time employees are those working for 30 or fewer hours per week.

Note

All figures exclude farm-based agriculture

Earnings By Place Of Work

The figures show the median earnings in pounds for employees working in the area who are on adults rates of pay and whose pay was not affected by absence. Figures for earnings come from the Annual Survey of Hours and Earnings (ASHE). The ASHE is based on a 1 per cent sample of employees, information on whose earnings and hours is obtained from employers. The survey does not cover self-employed. In 2004 information related to the pay period which included 21 April.

The earnings information collected relates to gross pay before tax, national insurance or other deductions, and excludes payments in kind. It is restricted to earnings relating to the survey pay period and so excludes payments of arrears from another period made during the survey period; any payments due as a result of a pay settlement but not yet paid at the time of the survey will also be excluded.

Annual Civil Service Employment Survey

The Annual Civil Service Employment Survey (ACSES) is based on a census of civil service departments on 31 March. ACSES counts all home Civil Service employees. It excludes the Northern Ireland Civil Service, other Crown servants and employees of the wider public sector. There are home Civil Service employees based in Northern Ireland and Overseas. Headcount statistics are based on the number of employees with an employment contract who are being paid by the organisation. Employees can be permanent, on a fixed-term contract or employed on a temporary basis. The self-employed, contract workers and agency workers are excluded. Employees not on the payroll and not being paid during the reference period are also excluded, for example, those on unpaid maternity leave, unpaid sick absence and career breaks. Full-time employees are those who are contracted to work 37 hours per week (36 hours per week in London for employees employed prior to 2013. Employees in London substantively promoted since 2013, or who have joined the Civil Service subsequent to this date, are now contracted to work 37 hours per week if on a full-time basis). Part-time employees are those who work less than the normal contracted hours.

Note ACSES data is currently only available for local authorities in England and Wales.

UK Business Counts

The data contained in the table are compiled from an extract taken from the Inter-Departmental Business Register (IDBR) recording the position of units as at March of the reference year. The IDBR contains information on VAT traders and PAYE employers in a statistical register which provides the basis for the Office for National Statistics to conduct surveys of businesses.

The table presents analysis of businesses at both Enterprise and Local Unit level. An Enterprise is the smallest combination of legal units (generally based on VAT and/or PAYE records) which has a certain degree of autonomy within an Enterprise Group. An individual site (for example a factory or shop) in an enterprise is called a local unit.

The employment information on the IDBR is drawn mainly from the Business Register Employment Survey (BRES). Because this is based on a sample of enterprises, estimates from previous returns and from other ONS surveys have also been used. For the smallest units, either PAYE jobs or employment imputed from VAT turnover is used.

Estimates in the table are rounded to prevent disclosure.

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Local authority profile for Fareham

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Appendix 7
LSH National Industrial Report



NEW DAWN

THE TRANSFORMATION OF
UK INDUSTRIAL & LOGISTICS

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WELCOME



JAMES POLSON
National Head of
Industrial & Logistics

A new dawn is rising for the industrial and logistics sector.

Albert Einstein once famously said, “The definition of insanity is to do the same thing over and over again and expect a different result”. This could not be any more appropriate for the current industrial and logistics market.

The landscapes of the industrial and retail markets are shifting rapidly. Shopping habits have become more advanced in the digital age with consumers wanting, and expecting, to receive goods ever faster and more efficiently.

The industrial and logistics sector is now at a crossroads. In general terms, significant yield compression has left yields with little room for further movement, meaning attention must be resolutely focused on driving income. If yields can't fall any further, industrial land values in some areas can only be justified with further rental growth. Without changing the offering to the modern consumer, how is that rental growth going to be realised?

Surely good old-fashioned supply and demand dynamics will drive rental growth? Will a “build it and they will come” mentality prevail? But what do we build? A conventional logistics facility with 12 metre eaves, 45% site density, 1:10,000 sq ft loading door ratio and 350 kVA power supply? We have always done it this way, and it's what occupiers want...

Except for many, it is now not. The logistics market is splitting into a two-tier sector before our very eyes. Occupiers are having to cater for an ecommerce demand boom while also

continuing to operate efficiencies for the more traditional logistics model. How can one size now fit all? The answer is it can't.

What was once seen as a bottom line cost for businesses is now viewed as the single most important growth initiative – a business's entire supply chain operation and its warehouse efficiency.

New obstacles are emerging, which the sector will need to address. The rise of automation, driven by the need to satisfy ever-growing online demand, is bringing with it power capacity challenges. In relation to operations transport and fleet modelling, this is now having to cater for a wider range of solutions.

The mid box sector, which was benefiting from the boom times, now seems to be stagnating in some areas. Labour availability in core locations is another challenge for the sector, but the quality of labour is also a growing issue given the evolution of supply chains.

While immediate concerns such as Brexit are grabbing the headlines, there are clearly other issues that are likely to have a greater long-term impact on the sector. With land values at an all-time high and yields at an all-time low, unlocking future value is the challenge we face.

We hope you enjoy this report. LSH's market-leading experts will be happy to discuss with you any of the topics covered on the following pages.

SUMMARY AND OUTLOOK

As the dust settles on another remarkable year for the UK industrial and logistics market, the positive underlying fundamentals associated with the sector are presenting growing challenges for both occupiers and investors alike. Despite this, the sector is nonetheless set to continue to outperform the rest of the property market over the coming years.

SUPER-SIZE ME

Amid another record-breaking year for investment volume, viewed overall, 2018 was a decent year for occupier market activity. UK-wide take-up for the year was marginally down on 2017 and 4% below the five-year annual average. Given the slowdown seen in the UK economy in the second half of the year, and growing anxiety around Brexit generally, the result paints a picture of real resilience across the market.

The main take-away from 2018 was the reversal of fortunes between the mid box and logistics segments. Logistics activity was back to boom levels, fuelled by a proliferation of 'mega deals' to retailers, both pure play and omni-channel. Conversely, the mid box sector endured a real fall from grace, with take-up in 2018 falling to a nine-year low after a record year in 2017.

BREXIT UNCERTAINTY

Occupier market activity in 2019 to date has, understandably, been tempered by Brexit, with still no certainty as to whether a no deal will be avoided. Activity has not ground to a halt, with headline grabbing deals still to report, but inertia may continue until the end of March. Thereafter, assuming a no deal Brexit is avoided, we can be confident that pent-up demand will be released with a rebound in activity.

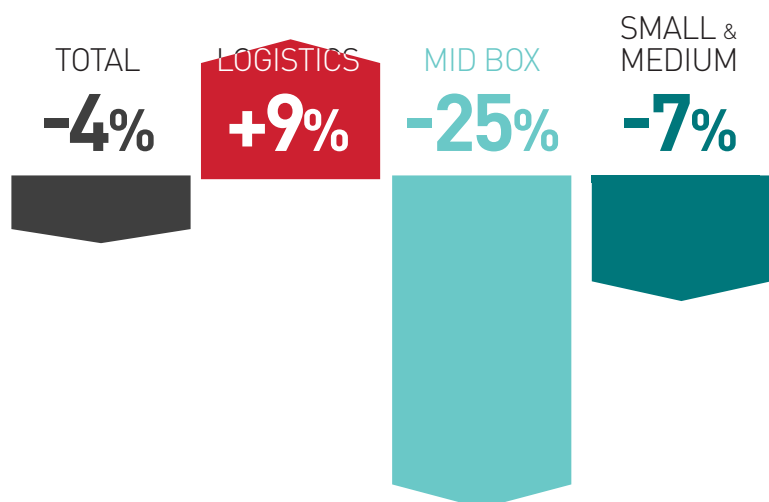
Amid the uncertainty, UK employment remains a major bright spot for the economy and has delivered consistently positive news in recent quarters. The tightness of the labour market has accelerated wage growth to an 11-year high of 3.4%, and a continuation of rising wages and low inflation could spur further spending growth, which would be significant boost to an otherwise uncertain outlook for the UK economy.

NO DEAL DISASTER?

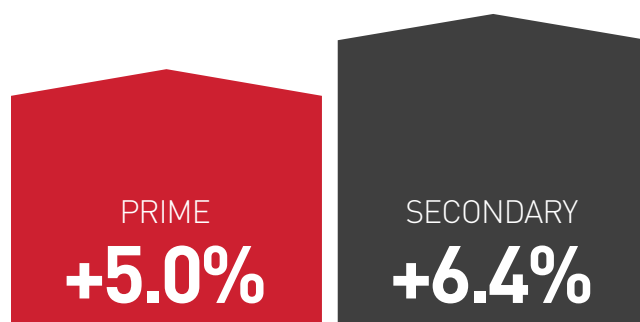
While the bookmakers continue to price a no deal Brexit outcome at the end of March as very much the outside bet, there are no guarantees. Reflecting the interdependency of supply chains across Europe, the initial disruption caused by a no deal would have massive short-term implications for logistics occupiers, while the expected hit to the economy more generally would put the brakes on occupier demand across the wider market.

Putting the short-term disruption aside, an end to frictionless trade with the EU would have both positive and negative ramifications for the logistics market and the manufacturing sector. While some occupiers could opt to retreat or consolidate their operations back to the European mainland, others will opt for a greater focus in the UK.

UK 2018 TAKE-UP VS FIVE-YEAR AVERAGE



AVERAGE UK RENTAL GROWTH 2018



Regardless of Brexit, it is important not to lose sight of the fact that the UK is home to over 60 million consumers. While the UK high street grapples with fundamental changes to shopping patterns, the growing challenges posed by ever more tech savvy and discerning UK consumers will continue to drive demand for logistics solutions from omni-channel retailers.

LABOUR PAINS

Ironically, perhaps the greatest challenge for occupiers and indeed developers is linked to the very fact that the UK employment market is in such strong shape. With the UK more or less at full employment, the days of easily tapping into large, largely unskilled pools of labour are long gone. Meanwhile, the prospect of stemming the flow of EU workers to the UK on the back of Brexit will only exacerbate the problem. Developers must consider prevailing supply levels in terms of both stock and labour in equal measure to minimise letting risk.

The move towards greater automation will mitigate some of the problem but, for the time-being, only a minority of market occupiers boast the sort of advanced facilities that are capturing public attention. We are aware of some prime locations which are now losing some of their competitive edge purely on the back of labour supply issues, with a number of occupiers exchanging higher transport costs for access to labour by moving into hitherto secondary locations.

RECORD (LOGISTICS) DEVELOPMENT

As predicted, a wave of speculative development has come through over the past 12 months and, at the end of 2018, a record 9.4m sq ft

of space was under construction in units above 50,000 sq ft. Development appetite has not waned either; a number of notable spec schemes started in the first weeks of 2019 while LSH's industrial agency network collectively anticipates 11.7m sq ft to come forward speculatively over the coming year.

While considerable development is gradually restoring the balance of supply at the larger end of the market, lower return expectations on smaller unit developments continue to act as a barrier to a meaningful supply response, reflecting the impact of build costs on development viability. This is looking increasingly like a classic case of market failure, with decent demand and uptake of new small unit schemes being seen when they do occur. Given local authorities' increasing exposure to property investing in recent years, this is arguably a potential area of opportunity to generate income and support local economies.

WHERE NEXT FOR PERFORMANCE?

The meteoric rise of investment interest in UK industrial & logistics was reflected in a second successive record year for volume, with £8.4bn of assets changing hands in 2018. Investors have also been able to reap substantial rewards over the past few years, with sector-leading returns for a third consecutive year seen in 2018, led by London & South East industrials, with returns at over 20%.

But where does the market go from here? With yield compression considered largely exhausted, one thing we can be sure of is that returns will begin to ease down to more 'normal' levels and, by 2020, we expect income to be the main driver of performance in sector

returns. UK industrial nonetheless remains forecast to continue to outperform the other key property sectors over the five year time horizon, albeit to a more modest degree than recent years.

2018 volume is also likely to represent the high watermark for investment activity. Whereas historically industrial developers tended to trade stock once complete, many are now retaining stock in their own funds and maximising income returns. Alongside greater caution towards shorter-leased secondary assets, we see this as a key contributing factor to a lowering of transactional volume in 2019.

BANKING ON RENTAL GROWTH

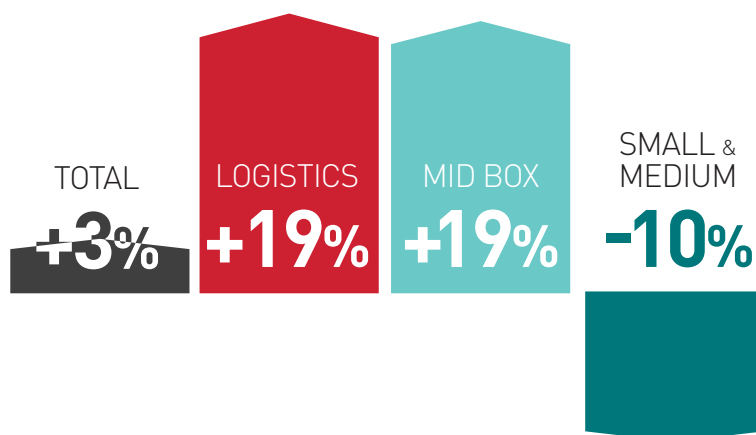
In the absence of yield compression, industrial's forecast outperformance is largely predicated on further rental growth coming through. For logistics, in certain parts of the country, the supply response we have seen will weigh down on further growth prospects. But, beyond that, there is continuing scope for robust growth and arguably even headroom for this to be stronger than portrayed in the forecasts.

What the econometrically-driven forecast model cannot readily factor in is the substitution effect, arising from the downturn in retailers' requirements for retail space in view of structural changes to shopping patterns. Just as UK retail warehousing rents went through a sustained two decade period of growth, could urban logistics be embarking on a similar journey? Moreover, with high void rates and falling rents being seen across many retail parks, there could just be a ready supply of future sites waiting in the wings. Food for thought.

2018 INVESTMENT



UK CHANGE IN SUPPLY, Y-ON-Y



DELIVERING INNOVATION



EDMOND LEAHY
Estates Manager,
Hermes

The parcel delivery business continues to grow exponentially. However, the increasing choice that consumers require poses real challenges, particularly in final mile delivery. To ensure these challenges become opportunities, Hermes is at the forefront of technological innovation.

According to Ofcom's latest update on the postal market, the volume of parcel deliveries in the UK increased by 11% between 2016/17 and 2017/18 to reach 2.4 billion. Hermes itself delivered more than 330m parcels in 2018 and has seen double digit growth every year for the past six years. The seemingly exponential rise in e-tailing is also characterised by discerning consumer expectations over delivery efficiency.

However, the conventional warehouse seems to struggle at a local level to efficiently serve the parcel delivery market. Properties available are sometimes not ideal for Hermes' needs; institutional, 1980s built, multi let industrial estates can be compromised or unsuitable, disproportionately expensive and, in a buoyant market, often only available on onerous and unacceptable terms. Particularly in London, the move to house a growing population has resulted in land being lost by commercial to residential, resulting in soaring rents.



A REVISED STRATEGY

In contrast to what is available, today's final mile parcel delivery strategies are increasingly agile and risk averse, requiring property solutions with a local community approach that involve flexible lease commitments. Put simply, the mantra is spread the risk and keep flexible.

As ideal property solutions become harder to find, parcel delivery businesses need to find innovative ways to meet customers' increasing expectations to receive what they want, when they want it. Greater automation will increase efficiency and productivity and final mile delivery is fast evolving. While this provides a real set of challenges, it may also provide opportunities.

INNOVATION

Hermes is trialling and exploring various cutting edge technologies. The emergence of 5G and artificial intelligence (AI) is bringing opportunities to offer more choice to customers. AI will introduce more automation, not just in delivery centres. In Southwark, Hermes trialled self driving robots in partnership with Starship Technologies to collect parcels from customers in 30 minute time slots. The robots have several advantages over aerial drones, from being able to carry heavier payloads to being less likely to fall foul of aviation laws.

Hermes was the first UK parcel delivery company to integrate its end to end tracking system with Amazon's Echo smart speakers, powered by Alexa. Customers can use voice commands to get an update on where their parcel is and view a photo of the parcel when it is delivered to a designated safe place.

As for customer choice, Hermes is exploring the areas of connected homes and one time keys. The homeowner gives the courier a one time passcode for their car or their front door, for example, so the parcel is delivered in a place convenient for them. Not only will the customer have more flexibility, but the courier can deliver the parcel at any time convenient to the rest of their journey.

5G will be widespread across the UK by 2022, which means we will be able to connect millions of devices at the same time, providing real time information on a parcel's location with granular accuracy. Vehicles will also be able to talk to each other, reducing overlap in delivery journeys.

SUSTAINABILITY

Sustainability is high on Hermes' agenda. Customer decisions are of course motivated by price and quality, but increasingly they consider sustainability. Hermes' new 81,000 sq ft flagship depot in Hemel Hempstead incorporates a long list of building sustainability criteria, including the sponsorship of indigenous tribes in Peru to preserve Amazonian rainforest and offset embedded carbon in the development.

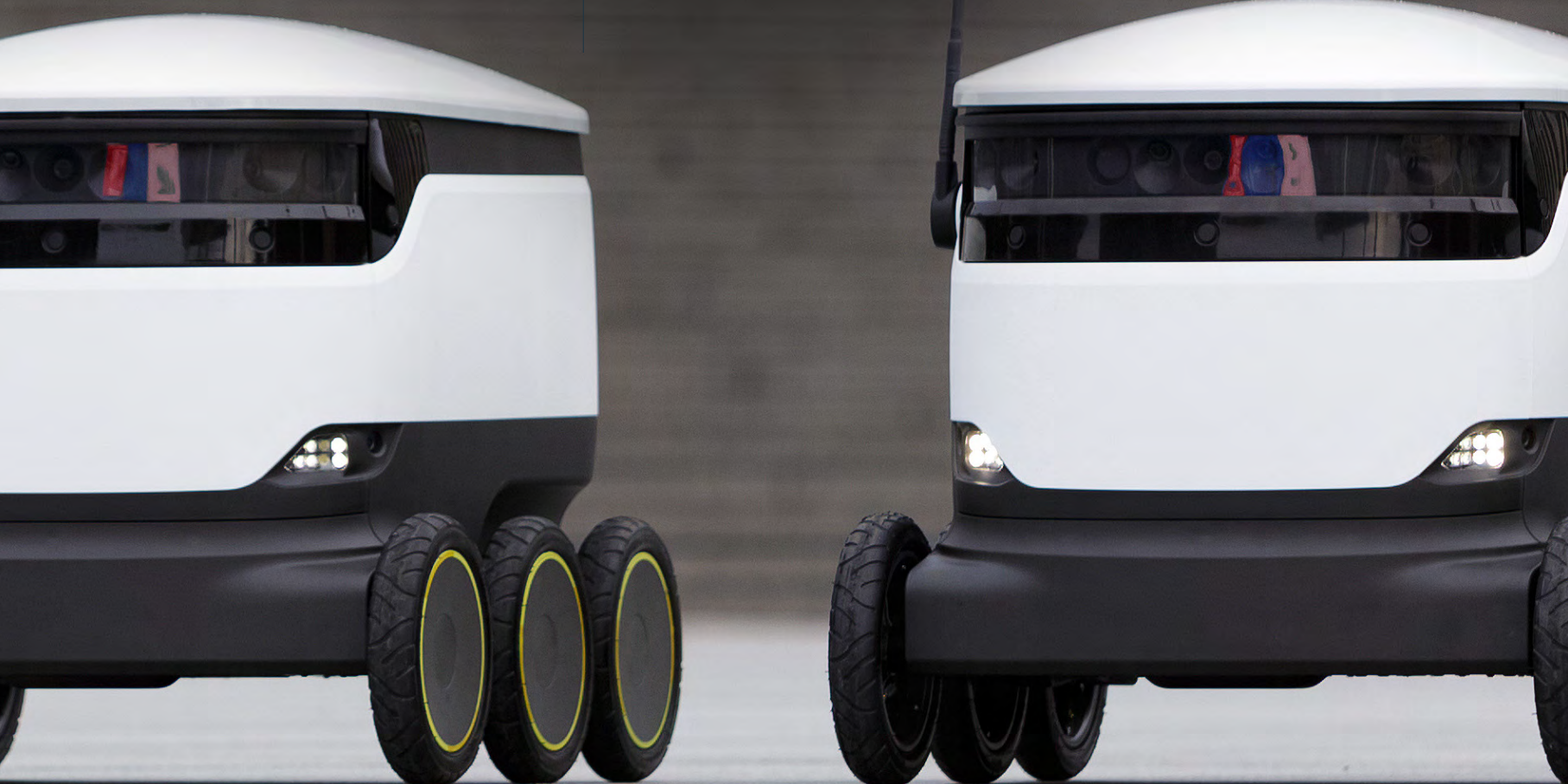
On 8 April 2019, an Ultra Low Emission Zone will be in place in central London, expanding to include inner London in 2021, and Hermes is prepared for this positive step. Most vehicles will need to meet tighter exhaust emission standards or pay a daily charge within the ULEZ, a phenomenon that will spread nationwide. Increased use of electric and compressed natural gas (CNG) vehicles is a key initiative if business as usual is to be maintained. In 2018, Hermes placed an order for 30 CNG vehicles in the UK, the largest initial order of any business to date, and plans to add a further 50 to its fleet this year.

A HAND FOR THE HIGH STREET?

While Hermes strives to offer increased choice to consumers, the ailing high street may provide an opportunity to help rather than merely observe bricks and mortar retailers, who are competing with pure play e tailers offering next day, or even same day, delivery. The concept of out of town consolidation centres may be a solution; parcel delivery firms could operate fulfilment centres, effectively storing stock for retailers.

The tough times that could lie ahead, not only for retailers, are particularly unclear as we face Brexit. No one yet knows what the full extent of any impact will be. There is real short term potential for the already rapid evolution in parcel delivery to increase as supply chains adjust.

What is not in doubt, however, is that the marketplace for parcel delivery will remain highly competitive and parcel volumes will continue to increase. Hermes is determined that innovation will counteract any lack in efficiency between final mile property and final mile customer requirements. ■



BIG BOXES ARE GETTING BIGGER



EDWARD PLUMLEY
Tritax Management LLP,
on behalf of Tritax Big Box REIT plc

In the five years since the launch of Tritax Big Box REIT Plc (TBBR) the big box market has grown – and so have the boxes themselves.

At launch in 2014, we had 14 assets with an average of 500,000 sq ft. Today it is 54 buildings and the average size has grown by 10%. That growth is reflected across the market.

ECOMMERCE AND AUTOMATION

The obvious reason for this is the rise of ecommerce, responsible for c. 18% of total retail sales last year and expected to grow to c. 27% by 2022. In the past six years, UK parcel delivery volumes have doubled, requiring three times as much big box space for online fulfilment.

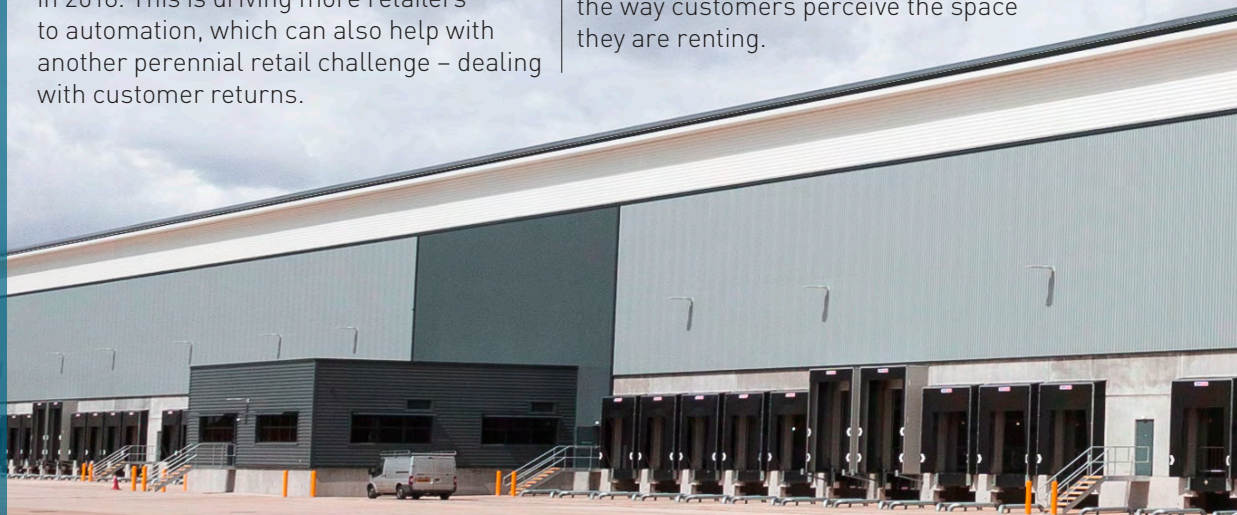
Spikes in demand are particularly challenging. Online retail sales during Black Friday week have increased from 33% in 2014 to 61% of total retail sales in 2018. This is driving more retailers to automation, which can also help with another perennial retail challenge – dealing with customer returns.

Approximately 80% of our assets over 500,000 sqft have automation, as does over 50% of our total portfolio by value.

EVOLVING OCCUPATIONAL NEEDS

Automation requires significant investment by our customers who therefore tend to take longer leases for these mission-critical buildings. Five years ago, our weighted average unexpired lease term was just under 14 years. It now stands at over 14 years, reflecting the longer lease trend.

This commitment is encouraging our customers to move towards larger volume facilities, sometimes with multiple floors for economies of scale. This could eventually see rents assessed on a volume rather than per sq ft basis, which would be more attuned to the way customers perceive the space they are renting.



BBOX FACILITY AT RAUNDS DELIVERED IN 2016 (658,971 SQ FT)



Larger, increasingly automated sites can still be people-heavy. Some of our big box facilities require over 3,000 warehouse staff to run efficiently in various shift patterns. This in turn shapes location requirements, which have broadened. Proximity to suitable and adequate population centres becomes more important, as does the need to be located near sufficient power. There is growing interest in onsite generation initiatives to power the automation.

COMPELLING INVESTMENT FUNDAMENTALS

Perhaps not surprisingly there remains a shortage of suitable big box supply for occupiers. This has meant that since 2011 the market has seen an overall headline rental increase of over 20% for modern facilities over 100,000 sq ft.

This has not gone unnoticed by investors and nor has ecommerce growth. The insatiable appetite for UK logistics investment opportunities and the weight of money in the sector have seen prime yields compress, although prime distribution yields still have a c. 300 bps spread over 10-year UK gilts. This suggests that yields are sustainable in the short-to-medium term in a low inflationary environment, even amid Brexit uncertainty.

BIG BOX AND BREXIT

Yes, we need to discuss Brexit. Last year we predicted an increase in take-up due to the challenges that Brexit presents to customer supply chains. In fact, for units over 250,000 sq ft, annual take-up increased by around 42%, according to our research.

As I write, the final UK position is no clearer and it still risks crashing out of the EU on WTO terms.

Lack of clarity has led many occupiers to stockpile products in additional facilities or increase existing volumes within current facilities. This is perfectly rational. Research has shown that a four-minute delay at Dover, which accounts for 30% of food imports from the EU, could potentially lead to a five-hour queue in the retail supply chain. This could have a meaningful impact on UK food flows.

Brexit aside, it is clear that investment fundamentals remain attractive and compelling for the big box subsector, with continuous strong occupational demand and a supply-demand imbalance for bigger and bigger boxes.

NEW DEVELOPMENT PARTNER

This makes TBBR's 87% purchase of DB Symmetry (DBS) all the more exciting. The deal offers shareholders an exciting pipeline of strategic sites that are well placed to capture new big box pre-let forward fundings over the next decade. These have a targeted yield on cost of between 7% and 8% (compared with the current 15-year prime distribution valuation yield of c. 4.5%).

The DBS portfolio offers opportunity to capitalise on over 2,500 acres, capable of delivering 38m sq ft of logistics space in strong and growing big box locations, complementing the existing 29m sq ft portfolio. It also gives us a 'best in class' development management team with the expertise required to capture these opportunities. The future remains bright. ■



MIXING IT UP



ALAN HOLLAND
Director
Greater London Business Unit
SEGRO

In a city of competing pressures, SEGRO's development at Nestlé's former site in Hayes, London is a pioneering example of co-locating residential and light industrial uses.

SEEING THE OPPORTUNITY

When Nestlé decided to close its factory in Hayes in 2014 and relocate the production of coffee and cocoa to Derbyshire there was uncertainty around the future development of the 30 acre site. While there was the potential to return the site to industrial use, we saw a unique opportunity to apply our thinking on mixed-use and deliver a mix of homes and industrial space aligned with the future needs of London.

With decades of experience in West London, we were well aware of the challenges facing local authorities in meeting demand for employment space, whilst delivering much-needed new homes. Indeed, our 2016 report, Keep London Working, highlighted the need to promote and protect the capital's industrial land to meet demand driven by ecommerce, despite the pressure to increase the delivery of housing.



AN INTEGRATED APPROACH

We embarked on the regeneration of the site with the clear objective to address these competing needs, whilst retaining elements of the art deco building which had been part of the community for several decades. To do this, we partnered with Barratt London, a residential specialist with a similar long-term outlook.

Together we advanced a masterplan for the site, collaborating on all aspects of the design to ensure the industrial and residential elements were complementary and integrated, as opposed to discrete developments side-by-side. The result is a scheme that delivers 240,000 sq ft of light industrial space, which will support up to 500 jobs, as part of a new neighbourhood of 1,400 homes set on the canalside.

It is worth remembering that the adjacency of industrial and residential uses is not new. It has been happening organically across London for some time with developers recognising the need for homes in areas of high employment, and vice versa. The key difference at Hayes is that our ownership of the 30-acre site allows us to properly integrate the two uses within an enhanced public realm. There will be areas of extensively landscaped public green space, improvements to the canal frontage and surrounding roads as well as a 3 km public trim trail, ensuring the residential and industrial zones are permeable and there is a coherency to the scheme overall.

FROM CHALLENGES TO SOLUTIONS

One of the primary challenges when integrating these uses is access and egress points. We have masterplanned the site so there are designated entrances for the warehouse units, separate to the entrance used by residents and in addition to pedestrian walkways and cycle paths which link the scheme to the canal.

Noise is also a consideration when marrying employment and residential uses. The term 'industrial' suggests heavy manufacturing, but in fact this type of modern light industrial space tends to be utilised by retailers, local SMEs or logistics companies who do not cause a lot of noise. Furthermore, we have invested in high quality design, including additional insulation for the residential units, which will mean noise from the workspace is barely audible from inside the apartments.

Looking ahead, one challenge in replicating this co-location elsewhere is the UK's rigid town planning rules which prescribe zones for land uses. The zoning of land makes it difficult to deliver this type of dynamic co-location, although we are encouraged by the latest draft of the new London Plan which is supportive of more innovative intensification of land. However, London still has some way to go to match the planning flexibility in some European cities.

In addition to planning flexibility, this type of mixed-use development requires scale, making the outer London boroughs most viable.

CONNECTIONS ARE KEY

Transport infrastructure is also crucial, not just for residents but also to enable the quick transit of goods. The site at Hayes benefits from good connections to the M4, M25 and A40 and is also within 5 miles of Heathrow Airport, which is a major pull for many logistics companies.

Moreover, the arrival of Crossrail at Hayes & Harlington in 2020 brings the site to within 20 minutes of Central London, considerably expanding the pool of workers occupiers can draw on.

With demolition now underway we are poised to begin construction of the 240,000 sq ft industrial space during 2019, with 1,400 homes to follow in phases over the coming three years. On completion we believe the scheme will offer a template for how London's diminishing land can be utilised to meet the growing need for homes as well as employment space. ■



REGIONAL MARKETS OVERVIEW

SCOTLAND

- Take-up decreased in all size bands in 2018.
- A lack of speculative development has constrained grade A activity.
- The availability rate of 7.3% is one of the highest in the UK.

NORTHERN IRELAND

- The sale of the former Michelin factory in Ballymena supported a 30% rise in take up.
- Despite a 38% increase in overall availability, grade A availability remains constrained.
- Prime and secondary rents were unchanged across the key Northern Irish markets.

NORTH EAST

- The North East saw the UK's two largest deals of 2018, both to Amazon.
- Big box take-up skyrocketed by over 700% to 5.3m sq ft.
- Grade A availability of 0.8m sq ft is the lowest of any UK region.

NORTH WEST

- A total of 10.6m sq ft was taken up in 2018, down by 13% on 2017.
- Bucking the overall trend, grade A take-up increased by 51%.
- Rental growth was recorded across the region, and was strongest in Crewe.

YORKSHIRE & THE HUMBER

- Take-up rebounded to 8.7m sq ft, 8% higher than 2017.
- Online retailers fuelled a 51% increase in big box logistics take-up.
- There is a growing cluster of speculative development near Doncaster's iPort.

EAST MIDLANDS

- Take-up hit a record 14.6m sq ft, the highest of any UK region in 2018.
- Big box logistics take-up increased by 93% to pass the 10m sq ft mark.
- Significant rental growth was recorded in the Golden Triangle markets.

WEST MIDLANDS

- Due to a lack of large logistics deals, take up dropped to a six year low in 2018.
- Mid box take-up was 1.3m sq ft, the highest total among the UK regions.
- Rental growth was widespread, led by Birmingham and Coventry.

EAST

- Boosted by several major build to suit deals, take up increased by 10%.
- Speculative development has increased, with Bedford being a key focus of activity.
- The availability rate of 2.6% is the lowest in the UK.

GREATER LONDON

- Despite a relative absence of large transactions, take up rose by 13%.
- Mid box take-up increased by 47%, the UK's strongest growth in this size-band.
- Prime rents rose by an average of 7.3%, with double-digit growth in several markets.

WALES

- Take-up fell to 4.3m sq ft in 2018, down 17% on the previous year.
- There is a severe shortage of grade A space, with just 0.4m sq ft available.
- The South Wales markets have been boosted by removal of the Severn bridges tolls.

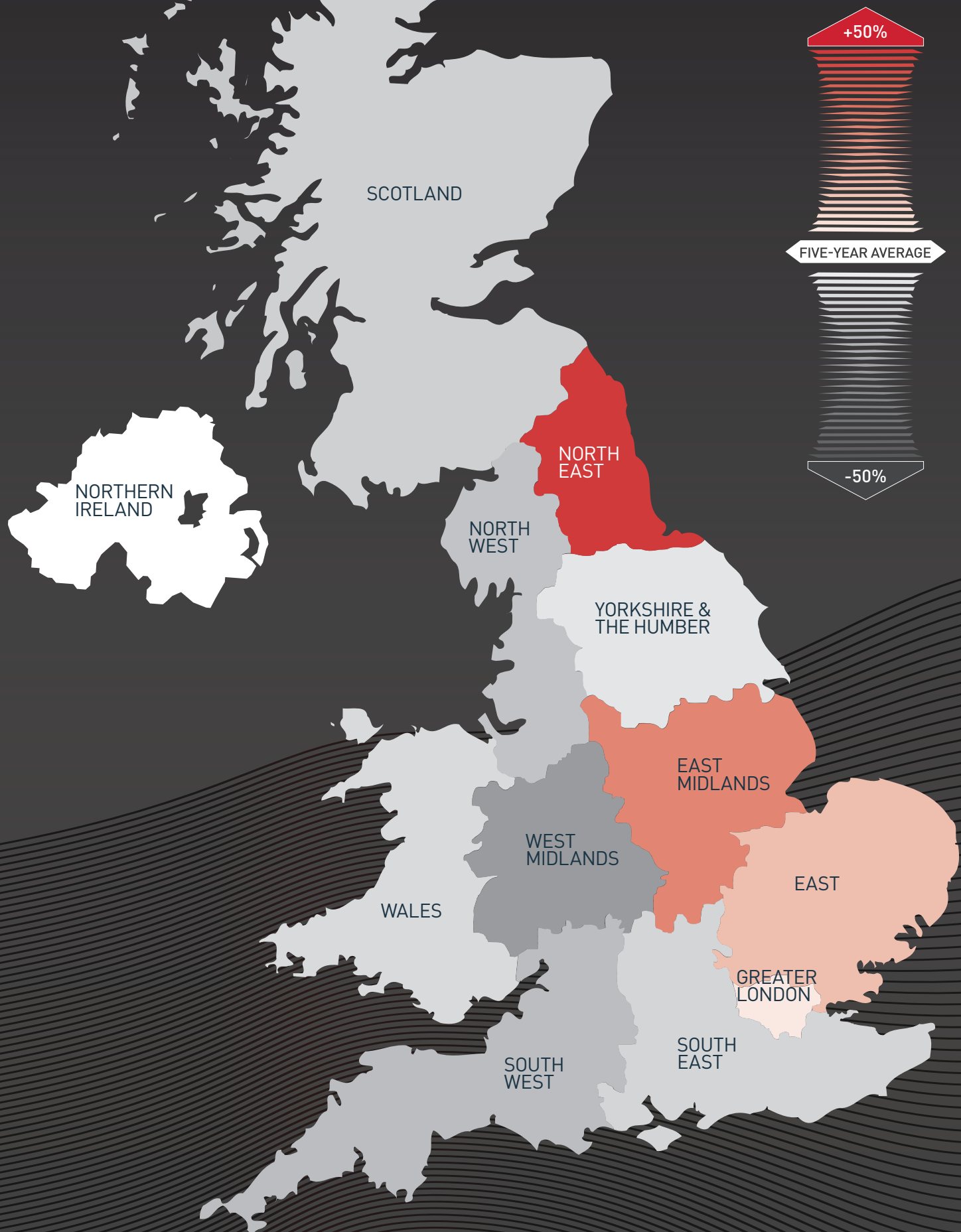
SOUTH EAST

- Take-up decreased by 14%, partly due to a lack of grade A deals.
- Logistics availability soared by 81%, on the back of new speculative deliveries.
- The margin between prime and secondary rents has narrowed significantly.

SOUTH WEST

- Take-up normalised, after being boosted by large-scale transactions in recent years.
- Availability increased by 17%, rising from an all-time low 12 months earlier.
- Secondary rents grew at a faster rate than prime rents across much of the region.

2018 TAKE-UP VS FIVE-YEAR AVERAGE



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Appendix 8
LSH South Coast Market Pulses Q1 and Q2 2019

SOUTH COAST INDUSTRIAL MARKET PULSE Q1 2019

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The start to 2019 shows little sign of retraction or faltering in a market which is seemingly awaiting the repercussions of Brexit. With take up levels tracking normal activity for this time of year, and a number of notable transactions under offer, we foresee a resilient H1 this year, despite a slight dip in enquiry levels.

AVAILABILITY

Availability of stock on the South Coast has increased by 20% when compared with the same period last year. This is primarily attributed to the secondary market, where we are continuing to witness a rise in availability quarter-on-quarter.

Several units from the secondary market, which have become available in this quarter, are located within the Fareham conurbation. This includes Unit 3 Crompton Way (40,311 sq ft), Electric Sawmills at Wickham Road (30,909 sq ft) and Units 32-34 Fareham Industrial Park (16,495 sq ft), Unit 3 Harbour Gate (34,000 sq ft).

In contrast the availability of prime stock is on the decline due to strong take, and several schemes currently under construction, which have not yet completed. The most sizable prime unit to have come to the market this quarter is Unit 1 Marine Employment at Centenary Quay in Southampton (31,881 sq ft); a unique offering of B1 and B2 use with wharf access. Other smaller prime units include Units H2-H3 Hermes at Daedalus Park (2,066 sq ft) and Unit K5 Keppel (2,594 sq ft).

The vital statistics have been summarised below:

	Q1 2019 (sq ft)	Q4 2018 (sq ft)	% change	% change Year on Year
Total stock	2,928,007	2,848,111	3	20
Prime stock	870,989	899,112	-3	-4
Secondary stock	2,057,018	1,948,999	6	35

TAKE UP

We have witnessed a positive start to 2019 in terms of take up, with an increase of 2%, when compared to the same period last year. In addition, there has been a significant shift in the number of transactions of prime stock, as tenants are grasping opportunities for more modern units to fulfil their occupational needs. The churn in the market is having a positive effect, seeing occupier relocate to new prime space and freeing up secondary stock.

As reported in our previous pulse, an influx of deals in Q4 2018, resulted in a strong year end, with take up marginally better than the same period last year.

There is also a significant amount of stock, which is under offer, that should continue this positive trend into Q2.

The vital statistics have been summarised below:

	Q1 2019 (sq ft)	Q4 2018 (sq ft)	% change	% change Year on Year
Total take up	441,695	574,999	-23	2
Prime take up	162,035	262,524	-38	104
Secondary take up	279,660	312,475	-11	-25

SIGNIFICANT OCCUPATIONAL TRANSACTIONS

PROPERTY	Size	Landlord/Vendor	Tenant	Terms	Rent / Price (per sq ft)
Police Investigation Centre, Merlin Park, Portsmouth	60,000 sq ft		Police and Crime Commissioner	50 year lease	Confidential
J9 South, Fareham	40,000 sq ft	Marick	Percival Aviation	Long leasehold sale	£143.75
Unit 2 Kites Croft, Fareham	35,058 sq ft	Aviva Investors	Cavendish Ship Stores Limited	15 year lease	£9.00
Imperial House, Southampton	31,104 sq ft	Pensworth Dairies	David Cover & Son Limited	Freehold sale	£66.70
Unit 42a Oriana Way, Nursling	19,289 sq ft	CBRE GI	Regional Express Limited	10 year lease	£9.50

ENQUIRIES

Enquiry levels witnessed an overall decline of 26% when compared to the same period last year or 5% when compared to the five yearly average. The only size bracket which outperformed Q1 2018, in enquiry numbers, was for units of 30,000 – 50,000 sq ft.

This is consistent with the current political and economic climate causing hesitance and uncertainty for occupiers.

DOUBLE DIGIT RENTS REACHED ON SOUTH COAST

As the availability of prime stock continues to be taken up, we anticipate rental levels for prime stock will continue to push rents into double digits on the South Coast, whilst good quality secondary rents will witness more marginalisation. This will include prime Portsmouth rents matching Southampton which is a significant milestone for the South Coast market. If lower grade secondary stock levels continue to increase, we expect these rents to stabilise.

About us

We are a commercial property consultancy working with investors, developers and occupiers in both the public and private sectors across the UK and Ireland. © 2019 Lambert Smith Hampton.

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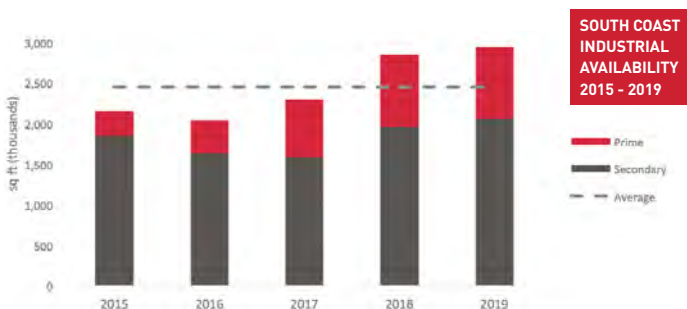
SOUTH COAST INDUSTRIAL MARKET PULSE Q2 2019

Lambert
Smith
Hampton

H1 2019 for the South Coast Industrial occupational market has upheld its reputation as a desirable strategic commercial hub, with strong performance indicators including; positive take up levels, maintained stock levels and increased numbers of enquiries. In a market with political uncertainty we are encouraged by the unflinching market forces that are being shown by developers and occupiers alike. The investment market as started to show some signs of caution amongst investors however assets with good fundamentals remain attractive.

AVAILABILITY

- Availability of stock on the South Coast has remained relatively static this quarter, with only a marginal increase of 13,342 sq ft, when compared with the same period last quarter, however the year on year figures are still on the rise with further new developments under construction.
- New schemes which have been brought to the market this quarter include **Phase 1 Proxima Park, Waterlooville** comprising **103,910 sq ft** and **Unit 2 Hermitage Park, Havant** totalling **32,500 sq ft**.
- There have been a number of enquiries in Q2 with various interested parties for pre-lets at **Dunsbury Park, Merlin Park**, owned by **BA Pension Fund** and developed by **Canmoor** has only **2 units left out of 7 units** on the scheme.
- Q2 saw **Fareham Borough council** obtain planning consent for a new speculative scheme comprising **3 industrial units totalling 50,000sqft**. Planning consent has also been granted for **3 units at Logistics City, Whitley** to be constructed speculatively **by Kier**. This scheme comprises **3 industrial units totalling 58,664sqft**.



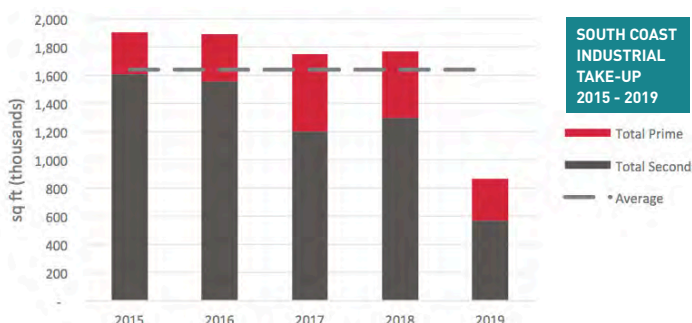
The vital statistics have been summarised below:

	Q2 2019 (sq ft)	Q1 2019 (sq ft)	% change	% change Year on Year
Total stock	2,941,349	2,928,007	0.46	12.41
Prime stock	883,284	870,989	1.41	-22.4
Secondary stock	2,058,065	2,057,018	0.05	39.2

TAKE UP

- As predicted 2019 has continued the positive trend, with take up levels remaining relatively consistent with Q1 and significantly improved when compared with the same period last year*.
- Availability and take up levels continue to show the resilience and strength of the south coast market. Prime take-up saw an increase of **637.67% (119,742 sq ft)** when compared to the same period last year, demonstrating the continued demand for prime stock, addressing the needs of the modern occupier seeking greater efficiency, reduced upkeep and lower operational costs.
- This also continues to have a positive effect on the industrial market as a whole, freeing up the secondary stock, which has also witnessed an increase in take up levels of **28.75% (64,067 sq ft)** when compared to Q2 2018.

*Q2 2018 was documented as a particularly quiet quarter with a significant number of deals under offer awaiting completion.



The vital statistics have been summarised below:

	Q2 2019 (sq ft)	Q1 2019 (sq ft)	% change	% change Year on Year
Total take up	425,464	441,695	-3.67	76.06
Prime take up	138,520	162,035	-14.51	637.67
Secondary take up	286,944	279,660	2.60	28.75

SIGNIFICANT OCCUPATIONAL TRANSACTIONS

PROPERTY	Size	Landlord/Vendor	Tenant	Terms	Rent / Price (per sq ft)
Optima 125, Hounslow Business Park, Totton	125,260 sq ft	TH Real Estates	Amazon UK Services Limited	10 year lease	£8.50
Units 7, 8 & 9 Test Valley Business Park, Southampton	48,936 sq ft	Draper Tools Limited	DSV Air & Sea Limited	3 year lease	£9.00
Unit 3 Compton Way, Southampton	40,311 sq ft	Threadneedle UK Property Authorised Investment	Trinart Limited	Freehold Sale	£83.10
Unit 200, Fareham Reach, Gosport	27,684 sq ft	Britel Fund Trustees Limited	Rainbow Designs Limited	10 year lease	£6.75
Unit 200, Fareham Reach, Gosport	27,684 sq ft	Britel Fund Trustees Limited	CPG Logistics Limited	10 year lease	£6.75
Unit 2 Merlin Park, Portsmouth	9,299 sq ft	Canmoor Developments Ltd	MGS Laboratories Limited	11 year lease	10.00

PRIME RENT CONTINUE TO MARGINALLY INCREASE

■ Rents remain relatively stable with a slight shift seen in prime rents in both Southampton and Portsmouth market, increasing in all size ranges. In the sub 5,000 sq ft market this is due to a lack of quality new build units and in the larger size sectors due to occupiers being prepared to pay more per sq ft for a new build with all its benefits as opposed to good quality secondary refurbishments.

■ The marginal rental gap between prime and secondary stock echoes the overall south coast market sentiment; that there is strong demand in this location and occupiers are willing to pay good rents for units in the right location, with sound building fundamentals.

	Prime capital value per sq ft	Prime headline rent per sq ft	Secondary capital value per sq ft	Secondary headline rent per sq ft
Under 5,000 sq ft				
Portsmouth & Havant	£135-£145	£10.00	£90-£100	£8.50
Southampton & Eastleigh	£150-£160	£12.00	£90-£100	£10.00
Bournemouth & Poole	£140-£150	£9.50	£95-£105	£8.50
5,000 – 20,000 sq ft				
Portsmouth & Havant	£125-£135	£9.50	£70-£80	£8.00
Southampton & Eastleigh	£130-£140	£9.50	£80-£95	£9.00
Bournemouth & Poole	£115-£120	£8.50	£85-£95	£7.50
Over 20,000 sq ft				
Portsmouth & Havant	£110-130	£9.00	£70-£80	£7.75
Southampton & Eastleigh	£115-£140	£10.00	£70-£85	£8.75
Bournemouth & Poole	£110-£120	£8.25	£65-£75	£7.25

ENQUIRIES

These positive market indicators have also been evident in the number of enquiries received. There has been a small increase in overall enquiry **levels of 8%** (an additional 11 enquiries) when compared to last quarter and 2%, when compared to the same period last year. This upward trend has continued for this quarter since 2016 (an additional 19 enquiries).

The majority of enquiries above 30,000 sq ft tend to be within the **logistic/last mile delivery companies** who are requiring supplementary accommodation to fulfil contract led requirements. Interestingly there are also enquiries from manufacturers, who are looking to take advantage of new builds in relocating to more modern and aesthetically pleasing industrial buildings.

INVESTMENT SUMMARY

■ As a result of Brexit uncertainty transactional activity over the course of H1 has seen a notable decline. That said, demand for prime well let product has remained relatively strong with assets continuing to command robust pricing. In contrast to this we have witnessed a heightened degree of caution around secondary assets with a notable mismatch between vendor and buyer expectations.

■ Since the start of the year our records show that **approximately £112m of industrial assets were made available to purchase**. Whilst a small number of these opportunities remain unsold, the **largest transaction**, which successfully closed in February 2019, was **the sale of Stanstead Road Trade Park and Boyatt Wood Industrial Estate for £34.725m** (4.35% NIY).

■ In conclusion, the South Coast continues to be an attractive location buoyed by the strength of the occupational market. Prime multi and single let industrial has remained resilient but there is a noticeable thinning in the buyer pool as a result of the political environment. **Prime yields stand at 4.25%.**

About us

We are a commercial property consultancy working with investors, developers and occupiers in both the public and private sectors across the UK and Ireland. © 2019 Lambert Smith Hampton.

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Appendix 9
LSH Employment B2/B8 Density Analysis

LSH Employment B2/B8 Density Analysis

The measures of beneficial economic impact are typically job numbers and GVA growth and employment densities are benchmarking data on the average number of employees who can be accommodated per unit of floor space provided. These benchmarks can then be applied to estimate the gross employment and GVA outcome of physical developments. Our research and other independent studies clearly demonstrates that the differential between B1c/B2 and B8 in terms of job creation is considerably more marginal than previously presumed, given the dynamic growth in the UK logistics sector in recent years, and the changing nature of B8 occupation. In order to sustain a cohesive and vibrant economy, logistics and distribution activity is essential to maintain an effective supply chain to service manufacturing, retail, leisure and the general consumer market.

We have conducted a sample analysis of employment densities within a range of Hampshire based businesses, to demonstrate the fluctuation in job numbers related to occupier activity and how densities have significantly increased as floor space is utilised more efficiently and occupiers derive greater value from their property overhead. The table below identifies the nature of the organisations' use, the category/categories the use would fall into, the number of FT employees and the approximate gross internal floor area and the resultant average employment density.

Occupier Activity	Employment Use Category	Estimated No. of Employees	Total Gross Floorspace Approx. SQ M	Average SQ M (SQ FT) per Employee
Distribution and packaging of fresh food produce	B8	65	3530	54
General engineering and assembly of aviation components	B2	292	19695	67
Warehousing and distribution of packaging materials	B8	25	2043	68
Injection moulding for automotive industry	B2	85	5574	65
Electrical component manufacture and distribution	B1C/B8	86	4180	48
Parcel delivery warehouse	B8	26	1115	41
Manufacture of credit card chips	B1C	120	6503	54
Assembly and distribution of specialist batteries	B1C/B8	79	4682	59
Manufacture and storage of water tanks	B2/B8	63	2322	38
Warehousing and distribution of pharmaceutical goods	B8	320	12077	37
Manufacture of air conditioning plant	B2	120	10219	85
Warehousing, distribution and 3 rd party logistics	B8	208	9290	45
Assembly, head office and distribution of fire detection equipment	B1C/B8	226	9173	41
Advanced engineering and production	B1B&C	95	5343	56
Packaging and distribution of clothing	B8	310	8590	28
Distribution and packaging of beauty products	B8	110	4865	44
Warehouse and distribution of	B8	210	7890	37

Occupier Activity	Employment Use Category	Estimated No. of Employees	Total Gross Floorspace Approx. SQ M	Average SQ M (SQ FT) per Employee
domestic appliances				
Specialist marine component manufacture	B2	90	4757	53
Distribution of food and drink	B8	181	6712	37
Production of food products	B2	95	4758	50
Manufacturers and distribution of motor vehicle parts	B2/B8	485	15232	31
Manufacture and warehousing of packaging materials	B1/B8	275	16200	58