



Employment Land & Premises Study

Blaby District Council

Final Report

October 2025

CONTENTS

EXECUTIVE SUMMARY	4
Introduction	4
Methodology	5
Findings – Policy and Strategy	5
Findings – FEMA	7
Findings – Property Market.....	9
Findings – Committed Employment Land Supply	11
Findings – Existing Employment Areas.....	12
Findings – Objectively Assessed Needs	13
Protecting Supplies and Meeting the Industrial/Warehouse Needs	18
Recommendations	20
1.0 INTRODUCTION	23
Study Objectives	23
Methodology	24
Employment Land Review Guidance	25
2.0 STRATEGIC AND POLICY CONTEXT	28
Introduction	28
National Planning Policy	28
Sub Regional Economic Policy	34
General Employment Land Needs	36
Strategic Logistics Land Needs	38
Local Planning Policy.....	42
Planning Policy Evidence Base	47
Other Local Policy.....	52
Neighbourhood Development Plans (NDP)	56
Summary	59
3.0 PROPERTY MARKET ASSESSMENT	62
Introduction	62
National and Regional Property Markets	62
The Leicester and Leicestershire Property Market	63
Skills and Innovation in Leicester and Leicestershire	65
Blaby District Council.....	66
Jobs and Business Change	66
Property Transactions.....	70
Property Supply	74
Valuation Office Data.....	76
Property Market Stakeholders	77
Summary	80
4.0 FUNCTIONAL ECONOMIC MARKET AREA.....	84
Introduction	84
Guidance on FEMA Definition.....	84
Analysis	85
The Blaby District FEMA.....	89
Neighbouring Areas	90
Summary	100
5.0 EXISTING EMPLOYMENT SITES AND PREMISES.....	102
Introduction	102
Land Supply.....	102
Site Scoring – Realistic Supply	111
Hinckley National Rail Freight Interchange	112
Employment Area Assessments	114
Summary	136
6.0 OBJECTIVELY ASSESSED NEEDS	138
Introduction	138
Model One Labour Demand – Baseline Forecast	140
Model Two Historic Land Take-Up.....	150

Summary of Blaby OAN and Further Adjustments.....	158
Differences Between the OAN Output and the HENA (2022)	162
Recommended Models	163
Summary	166
7.0 POTENTIAL EMPLOYMENT GROWTH OPPORTUNITIES	170
Introduction	170
Assessment	170
Summary	180
8.0 CONCLUSIONS	182
Introduction	182
Policy and Strategy	182
The Functional Economic Market Area	184
Property Market Assessment.....	185
Employment Land Supply	189
Existing Employment Areas	191
Objectively Assessed Needs	192
Protecting Employment Land Supplies and Meeting the Needs	199
9.0 RECOMMENDATIONS	200
Introduction	200
Employment Sites and Premises	200
Future Employment Land Needs	207
Meeting Needs.....	209
Other Recommendations	212

Appendix 1 – List of Consultees	
Appendix 2 – Jobs Change Analysis	
Appendix 3 – Employment Site Proformas	
Appendix 4 – Blaby Site Scoring System	
Appendix 5 – Blaby Sites Scoring Assessment	
Appendix 6 – Blaby Employment Areas Mapping	
Appendix 7 – Forecast Working	
Appendix 8 – Potential Employment Opportunities Mapping	
Appendix 9 – Developer Marketing Standards	

EXECUTIVE SUMMARY

Introduction

- i) This report provides an Employment Land and Premises Study (ELPS, this Study) for the District of Blaby (Blaby District, the district). It was commissioned to update the 2011 Employment Land Study, also completed by BE Group. It has been carried out on behalf of Blaby District Council (the Council).

- ii) It should be noted that this study considers the local need for, and supply of, employment land in Blaby District only. Strategic needs for B8 logistics, across Leicester and Leicestershire, are considered separately in the 'Warehousing and Logistics in Leicester and Leicestershire: Managing Growth and Change (2022)' study and the ongoing 'Leicester and Leicestershire: Strategic Distribution Floorspace Needs Update and Apportionment' study.

- iii) The Overarching Study Objectives, as set out in the Study Brief, are:
 - 1. "To identify the quantity of local employment land (B1 [now E(g)], B2 and B8) required in Blaby District during the plan period up to 2041 and 2046. The evidence contained in the report will inform policies and allocations in the emerging Local Plan
 - 2. To identify recent economic and employment trends and how these might impact on future development in the area and whether the existing employment allocations and sites are fit for purpose to meet this growth
 - 3. To understand the overall employment market within the district, across the different sectors."

- iv) The study should be mindful of, and align with, other studies that provide evidence relating to the provision of employment land. These include the Housing and Employment Needs Assessment, employment land and premises studies for neighbouring Local Planning Authorities within the Functional Economic Market Area and the Warehousing and Logistics in Leicester and Leicestershire study."

Methodology

- v) The ELPS comprised several stages:
- Market Assessment – Reviewed the current market demand for employment land and premises analysing socio-economic data on sectoral change and transactional/vacancy data, sourced from EGi Radius. This quantitative data was supported by engagement with property market stakeholders to provide a full picture of the market. The district level analysis was expanded upon to review the property market within Blaby District’s wider Functional Economic Market Area (FEMA) through desktop analysis of employment and planning strategies, and consultations with officers from the constituent local authorities
 - Assessment of Employment Sites and Premises – Reviewed the developed and committed supply of employment land and premises which can meet both present demand and future needs. Work included analysis of developed Employment Areas and undeveloped sites through site visits, reviews of planning consents, physical constraints and past sales/lettings on sites, via the Nimbus database and utilising Valuation Office (VOA) data. Landowners, developers and their agents were interviewed to identify plans for change
 - Future Need – Used recognised methods of Labour Demand, utilising Cambridge Econometrics forecasting, and Past Take Up analysis to project the future employment land needs to 2041 and 2046
 - Comparing Need/Demand and Supply – Identifying what additional/alternative supply may be required. Included consideration of the deliverability and market fit of potential employment growth opportunities which may meet additional needs, comprising options submitted in Call for Sites exercises.
- vi) The methodology follows Planning Practice Guidance on employment land reviews and with consideration of national, sub-regional and local planning policy, research and policy guidance.

Findings – Policy and Strategy

- vii) The existing National Planning Policy Framework (NPPF) requires a presumption in favour of sustainable development, to support sustainable development and ensure that Objectively Assessed Needs for uses including employment land are met (Section 2). Planning policy should also “help create the conditions in which businesses can invest, expand and adapt” (Section 6). Section 11 on making “Effective Use of Land” encourages reallocating land, including employment land, where there is no reasonable prospect of

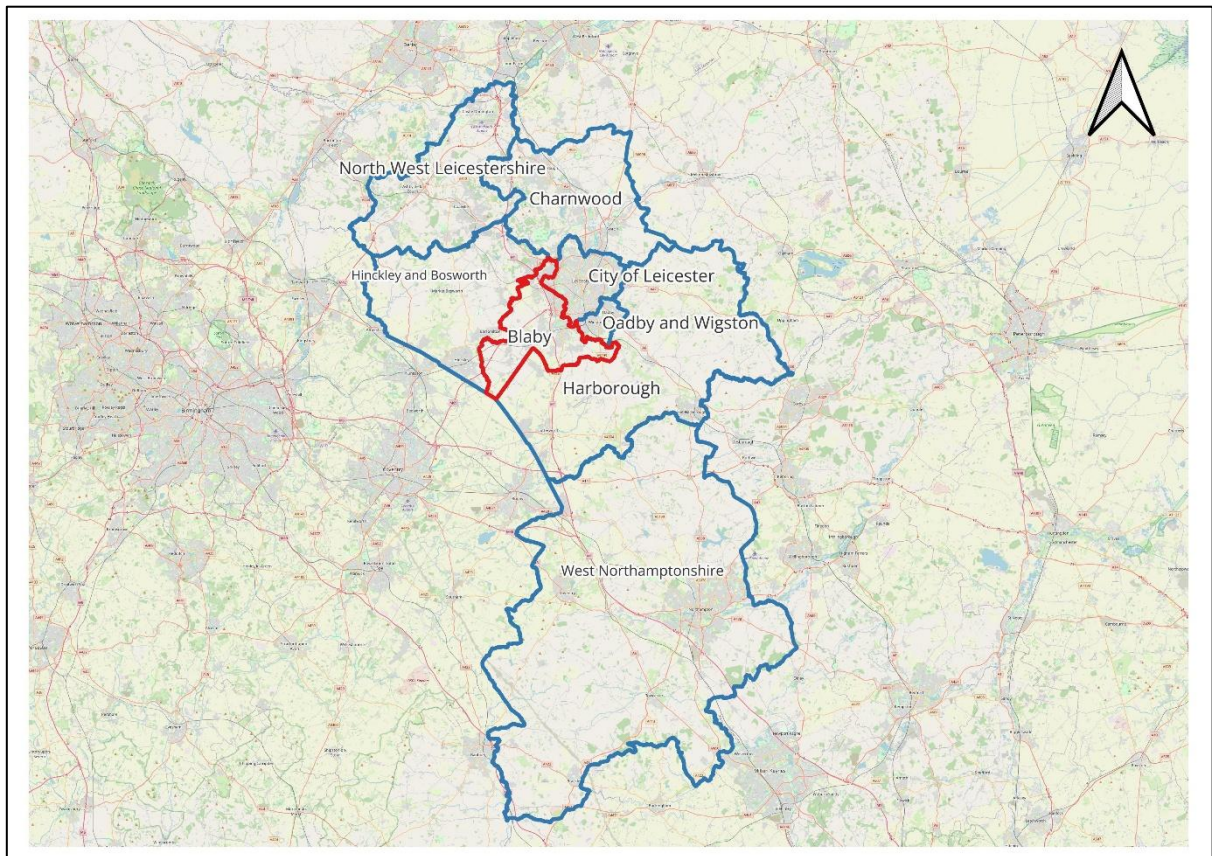
an application coming forward for the allocated use.

- viii) Amendments to the NPPF, consulted on and amended during the period of this Study, provide changes to guidance on housing matters, particularly stricter targets for delivery. Increased housing needs may lead to pressure to change some employment land allocations to residential, or mixed-use.
- ix) The 2020 Use Classes Order Amendment combines the B1 Office/Research/Light Industrial Uses along with the A and partly D1/ D2 uses into a single 'E' Use Class. For Blaby District, the practical effects are likely to include some greater pressure to convert town centre offices to other uses. The Use Class change has no spatial considerations and therefore will apply outside of town centres as well. It thus has the potential to result in the introduction of non-office/non-industrial type activities, including retail, in out of centre business parks, and industrial estates, although this is a trend which has been ongoing for some time and can, in moderation, beneficially diversify local economic activity.
- x) The 'Warehousing and Logistics in Leicester and Leicestershire: Managing Growth and Change study (2022) identified logistics needs, net of supply, of 768,000 sqm or 307 ha was identified for rail-served needs and 392,000 sqm or 112 ha for road (non-rail) need, to 2041. The M69 and adjacent rail links are identified as areas of opportunity for rail and road connected sites. The M1 Corridor, extending south from approx. Narborough, into Harborough, is identified for road linked logistics. It is noted that the Logistics Study is being refreshed, however, so all figures are subject to change.
- xi) The latest Leicester and Leicestershire Housing and Economic Needs Assessment (HENA) (2022) utilised a mixture of Labour Demand and Past Take Up modelling to identify needs of 38.0-60.5 ha for the forecast periods 2021-2036, 2021-2041 and 2021-2050. This 2025 district level study provides a Blaby District specific update to the HENA and, where possible, utilises a forecast methodology consistent with that used in the multiple HENA Studies completed since 2017.

Findings – FEMA

- xii) A FEMA exercise has been completed, bespoke for this Study and distinct from that completed in the HENA Studies which considered a FEMA for the whole of Leicester and Leicestershire. This included consideration of commuting patterns, identified Housing Market Areas, cross boundary services and infrastructure and the former Leicester and Leicestershire Local Enterprise Partnership. The FEMA for Blaby District was identified as comprising all of Leicester and Leicestershire apart from Melton. Blaby District also has strong commuting links with West Northamptonshire along the M1 and A5 Corridors (see Figure ES1).

Figure ES1 – The Blaby District FEMA



Source: BE Group, 2025

xiii) Within this wider FEMA area, the following larger than local economic issues, which may impact on Blaby District, are noted:

- Charnwood – In Charnwood, a range of larger E(g)/B-Class employment schemes are proposed, most of which link to the Leicester Principal Urban Area and to Loughborough and so interrelate and compete with equivalent schemes in the east of Blaby District. If brought forward, Loughborough Science Park would meet science and technology requirements from across Leicester and Leicestershire, however, there has been no delivery here, to date and full take up of the 73 ha of allocated land will likely be a long term prospect.
- Charnwood, Harborough, North West Leicestershire and Hinckley and Bosworth – Along with Blaby District, these are the established foci for non-rail related strategic logistics, in Leicester and Leicestershire and is expected to be the focus for such strategic development moving forward.
- Leicester – Unsurprisingly, Blaby District has very strong linkages with Leicester, with 18,418 commuter movements recorded between the two locations in 2021. Leicester is a long established centre of the office market in the East Midlands, both in terms of the City Centre generally and the associated high tech centre of Pioneer Park. Historically, that market has extended west to include Grove Park, supporting businesses that need more direct access to the motorway corridors. Overall, this will not change, limiting the capacity for private sector office sector growth in the surrounding county. Recent years have seen the successful development of some Grade A offices in the City Centre, boosting confidence about future growth. The overall net gain of stock is still expected to be modest though, and it remains to be seen if equivalent gains on the periphery of the Leicester Principal Urban Area are possible.
- Oadby and Wigston – Growth and change here is expected to be at the local level only.
- West Northamptonshire – At present, SEGRO Logistics Park East Midlands Gateway, North West Leicestershire and Daventry International Rail Freight Terminal (DIRFT) in West Northamptonshire are the only rail related logistics schemes in the FEMA. SEGRO Logistics Park is now full and the existing DIRFT phases are also nearing capacity, although a DIRFT IV is proposed it is not yet known if it will be identified in the next West Northamptonshire Local Plan.

Findings – Property Market

- xiv) This Study has assessed the regional and local commercial market through a quantitative review of past reports, socio-economic and transactional data from the last decade, the local supply of vacant premises, alongside up to date market knowledge from consultations carried out with Council/County Council officers, developers, scheme managers and property agents.
- xv) **Industrial Property Market** – Regionally, the market for larger industrial and warehouse stock remains strong and there is a lack of modern, high grade buildings to meet needs. Conversely there is an oversupply of older, second hand units. Supply shortages are encouraging business to refurbish or expand their existing units.
- xvi) In Leicester and Leicestershire, the investment market in the west of the city and county has been dominated by the logistics sector. This boom has delivered growth to Blaby District, supporting the fast take up of Optimus Point and the New Lubbesthorpe Strategic Employment Site, although there remain shortages for local firms, particularly for grow on space and freehold options. Another growth area, with demand more evenly spread across Leicester and Leicestershire, is advanced manufacturing industries, including green sector businesses. Companies in such sectors typically want 2,000-3,000 sqm units, but smaller high tech properties are also popular and achieving high rents.
- xvii) In Blaby District, for the last decade at least, vast majority of market activity was for sub-5,000 sqm units, and particularly units of 201-500 sqm and 1,001-5,000 sqm. Stakeholders report good local demand for leasehold premises of 300-700 sqm and freehold premises of up to 1,000 sqm to allow local business growth. Such demand is found across the district, including into rural areas, but is focused on the main transport routes.
- xviii) Demand for larger industrial and warehouse premises is focused on the M1 Corridor generally and on Meridian Business Park more specifically. In the north and west of Meridian there is a healthy market for larger units of 15,000-30,000 sqm both from existing large employers and investors who may be looking across the Leicester Conurbation. The quality of the local stock, in Blaby District, is generally good and there are no employment areas where low grade stock is a particular issue.

- xix) Rural stock is relatively accessible, including via bus routes, and the more rural settlements in the west of the district, including Stoney Stanton, Sharnford and Croft, as well as Cosby in the east, have at least one industrial estate. These serve broad rural catchments and meet a lot of needs. Their availability means there tends to be less pressure for farm conversions.
- xx) **Office Property Market** – Hybrid working practices are encouraging businesses to review their office property holdings. Where companies are seeking space in 2024, there is a much greater focus on buildings that are sustainable and energy efficient.
- xxi) There is also a strong demand for serviced and co-working space from established businesses that wish to lease short-term space. While little new Grade A stock, is being developed, or becoming available, within the East Midlands, this need is being met in good quality second-hand stock, increasing the confidence of landlords that refurbishments of older properties will be repaid by swift lettings. Conversely, low grade offices are increasingly surplus to requirements and being converted to other uses.
- xxii) In terms of offices, Blaby District generally forms part of the common market area with Leicester and has historically been successful at attracting major employers to schemes like Grove Park. Today, however, both Blaby District and the city locations lack the Grade A space to compete with cities such as Nottingham for such uses, while viability is a barrier to further development. Even in a recovering market, the development of large scale new offices is unlikely to be viable anywhere in Leicester and Leicestershire, without public sector support.
- xxiii) In Blaby District, most market transactions, over the last decade, were for sub 500 sqm units, and particularly sub 200 sqm properties. The local office market has improved significantly since the end of the Covid-19 Pandemic and associated Lockdowns. Businesses have a clear idea about the quantum of space they need, releasing surplus space but also seeking out higher grade alternatives.

- xxiv) Blaby District has a good offer of modern office premises, in very accessible locations around Enderby and Braunstone Town. As elsewhere, there has been little recent growth in the offer in Blaby District which might attract new businesses and allow existing businesses to grow. The prospects of significant new development remain modest, and it is more likely business needs will be met through the refurbishment and remodelling of stock. As businesses practicing hybrid working generally require smaller suites, there are now opportunities to increase the density of office units. Local firms generally require suites of up to 500 sqm while larger businesses will frequently invest in a more substantial, freehold/long leasehold property of up to 2,000 sqm.
- xxv) Stakeholders also report a healthy rural demand for smaller offices, generally smaller than 200 sqm each. This is also true in the other Leicestershire authorities, with markets extending across boundaries, overlapping between Blaby District, Hinckley and Bosworth and Harborough. Blaby District is reasonably well served by rural schemes, including Narborough Wood Park, Desford Road, Enderby and a quite comprehensive offer in Croft. These offer high grade accommodation but are usually near to capacity so there is always demand for more stock.

Findings – Committed Employment Land Supply

- xxvi) An assessment of the committed employment land supply, excluding land unlikely to be brought forward, proposed for alternative uses or held for specific occupiers suggests a realistic figure of 44.03 ha, in seven sites across the district. 98.1 percent of that realistically available supply is within Enderby and adjacent New Lubbethorpe. Provision elsewhere, and particularly outside of the Leicester PUA is negligible, with only two very small sites – Site 9: John Brindley Transport, Aston Lane, Sharnford (0.18 ha) and Site 10: Land Southwest of Junction with Stanton Lane and Pingle Lane, Potters Marston (0.15 ha) serving the rural west of the district.
- xxvii) By far the largest site is Site 1: Land West of St Johns, Enderby which now benefits from Outline consent for a strategic scheme, for the full 33.30 ha, and is controlled by an experienced owner and land promoter. The Report “Warehousing and Logistics in Leicester and Leicestershire: Managing growth and change, 2022” identifies the site at Land West of St Johns as a commitment in terms of strategic B8. If the District Council considers that the Land West of St Johns site forms part of the ‘strategic’ supply required to meet wider B8 needs (thereby removing 33.3ha from the potential ‘local’ supply), the emerging Local Plan will need to make provision for additional employment land to meet the residual local requirement identified by this study

- xxviii) 1.99 ha of this supply, comprising Site 6: Land At Everards Meadows, Cooper Way, Enderby, is consented for offices only. The supply specifically for industrial and warehouse uses is thus **42.04 ha in six sites, assuming Site 1: Land West of St Johns, Enderby remains in the local supply.**
- xxix) In September 2023 an application for a Development Consent Order (DCO) for the 850,000 sqm Hinckley National Rail Freight Interchange was submitted for Examination by the Planning Inspectorate. The main Hinckley National Rail Freight Interchange Site covers an area of approximately 187 ha and is located north west of Junction 2, M69, between the Leicester to Hinckley railway line and the M69, south of Elmesthorpe and north east of Hinckley.
- xxx) However, the scheme was refused by the Secretary of State for Transport on 10th March 2025, due to its negative impact on highways safety at several adjoining locations. At the time of writing it is not clear if a revised scheme will be put forward here, but the existing proposal cannot be considered as part of either the local or strategic employment land supply.

Findings – Existing Employment Areas

- xxxi) 26 Employment Areas (industrial estates and business parks, including 20 locations allocated in the existing Local Plan) in the district have been appraised and assessed through a combination of site visits, local intelligence and the views of those involved in the property market in those areas. The Areas are mapped in Appendix 6 and proformas are provided, for each Area, in Section 5.0 of the Main Report.
- xxxii) The 26 employment areas assessed, comprise 382.28 ha of mostly developed employment land. By far the largest Employment Area is Braunstone Town Meridian Business Park (with Osiers Business Park and Lubbesthorpe Gateway), Braunstone Town (81.92 ha). They include 826,292 sqm of premises in 553 properties. 43.9 percent of these properties are offices while 38.0 percent are industrial, and 15.0 percent are warehouses.
- xxxiii) Across the 26 Areas, there was no external evidence of dereliction in any property and most stock is of average or good quality, being built after 1990. On average, the Areas are 93 percent occupied which indicates a high level of local economic activity. The study recommends that all but three Areas be protected in the next Local Plan. The exceptions are:

- Hazel Drive, Braunstone Town which comprises two properties in motor trade, rather than traditional E(g)/B-Class use
- Watergate Lane, Braunstone Town, where again premises is in trade/wholesale rather than traditional E(g)/B-Class use
- Croft Quarry Offices, Huncote Road, Croft which, while 75 percent occupied, only comprises four properties in a mostly backland position with constrained access.

xxxiv) Additionally, there will need to be a reduction in the size of The Whittle Estate, Whetstone, to allow for the loss of land in the north west to housing.

Findings – Objectively Assessed Needs

xxxv) Two alternative forecast options have been produced and considered for the periods of 2024-2041 and 2024-2046 for Blaby District.

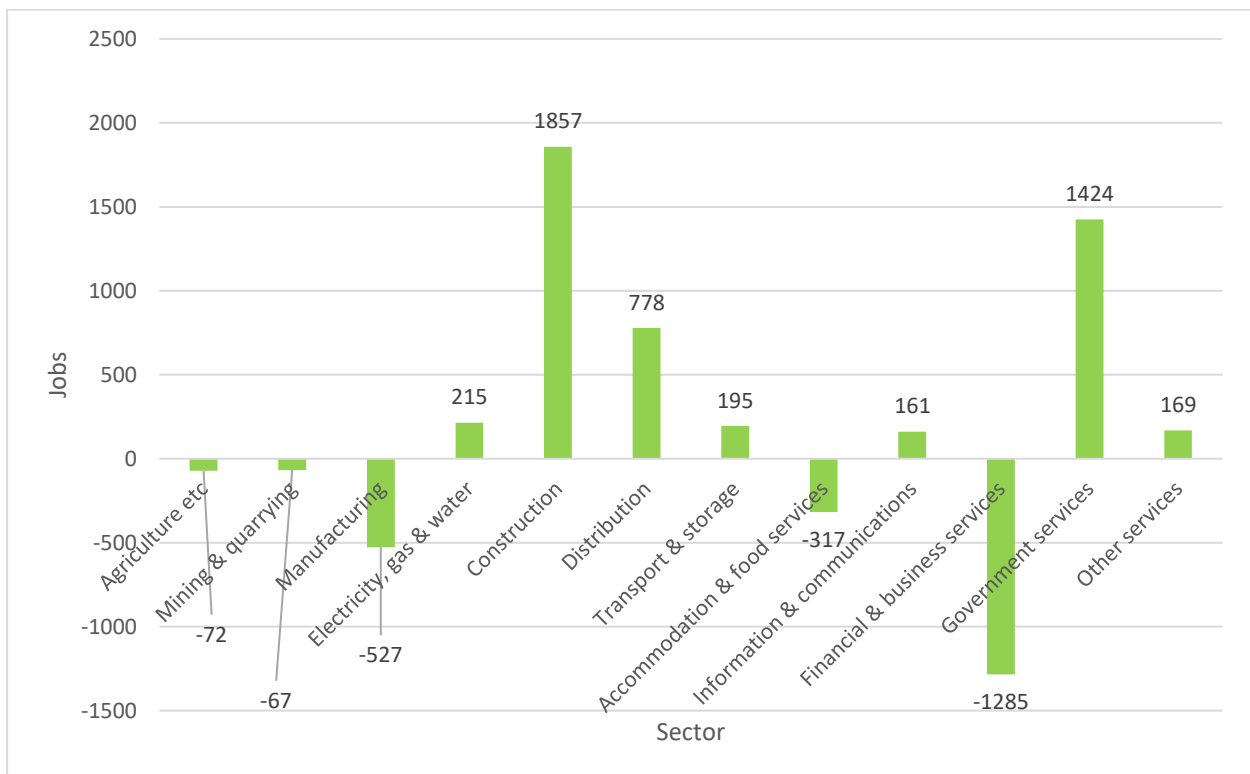
Labour Demand

xxxvi) Model One is Labour Demand, a baseline or Policy-Off forecast which makes no allowance for major public policy interventions in Blaby District. It uses, as its base, the Cambridge Econometrics forecast of jobs change, by sector, over 2024-2041, and 2024-2046. The Cambridge forecast projects the following overall growth:

- 2024-2041: 2,062 extra jobs
- 2024-2046: 2,531 extra jobs.

xxxvii) Figure ES2 shows the forecast jobs change, to 2046, by sector. It shows that the most significant growth will be in Construction, followed by Distribution. By comparison, significant overall declines are projected for Manufacturing employment and most private office sectors. These losses influence the model outputs for the industrial and office sectors, as is highlighted below.

Figure ES2 – Projected Sector Growth/Decline, 2024-2046



Source: Cambridge Econometrics, 2024

xxxviii) To use these figures to forecast OAN in Blaby District, several adjustments must be made to allow for real world conditions:

- An allowance is made for part time working in the labour force, by converting the forecasts for total employment, by sector, into forecasts for Full-Time Equivalent (FTE) jobs by sector
- Deductions are made for homeworking based on 2021 Census data.
- The FTE jobs change figures are converted into a floorspace and land need using standard estimates of jobs density, the floorspace each job requires, and estimates of what proportion of the jobs will be accommodated in E(g)/B-Class property.

xxxix) The FTE jobs change figures are converted into a floorspace and land need using standard estimates of jobs density, the floorspace each job requires, and estimates of what proportion of the jobs will be accommodated in E(g)/B-Class property. When the resulting land needs from the office, industrial and warehouse sectors are combined, the following OAN can be identified, with and without a deduction homeworking (see Table ES1). As mentioned, as the jobs forecasts project declines in industrial and office employment, the resulting land requirements are also negative.

Table ES1 – Forecast Outputs, Hectares

Use	2024-2041	2024-2046
Gross of Homeworking		
Office (inc. Research and Development) Land Need	-0.2	-0.2
Industrial Land Need	-4.6	-4.6
Warehouse Land Need	1.7	1.7
Total Land Need	-3.2	-3.2
Net of Homeworking		
Office (inc. Research and Development) Land Need	-0.4	-0.2
Industrial Land Need	-5.5	-5.5
Warehouse Land Need	2.1	2.1
Total Land Need	-3.8	-3.6

Source: Cambridge Econometrics, Blaby District Council, BE Group, 2024

Historic Land Take Up

- xl) Model Two is Past Take Up, the forward projection of historic take up in Blaby District since 2006/2007.
- xli) A separate assessment of needs for strategic logistics land, for premises larger than 9,000 sqm, is currently underway entitled 'Leicester and Leicestershire: Strategic Distribution Floorspace Needs Update and Apportionment' updating previous research and covering the whole of Leicester and Leicestershire. To avoid double counting of needs, five completions larger than 9,000 sqm each were removed from the Take Up data for this analysis.
- xlii) The last national recession left significant and lasting impacts on the UK property market, including viability impacts on the delivery of office premises and growing demand for logistics accommodation which has continued into the 2020s. To consider how the recession has changed the property market in Blaby District, a second 'short term' Past Take Up Model has been completed which only reviews take up over the 11 post recession years 2013-2014 to 2023-2024.
- xliii) Tables ES2 and ES3 summarise the outputs of Models One and Two. A buffer of 5 years is also applied to all the OAN figures to provide a choice of sites by size, quality and location, allow for exceptional losses, particularly through Permitted Development, and to provide a continuum of supply beyond the end of the forecast period.

Table ES2 – Blaby OAN Projections – Labour Demand Models – With a 5-Year Buffer, Hectares*

Use	2024-2041	2024-2046
Gross of Homeworking		
Office (inc. Research and Development) Land	-0.2	-0.2
Industrial Land	-4.6	-4.6
Warehouse Land	2.2	2.2
Total Land Need	-2.6	-2.6
Net of Homeworking		
Office (inc. Research and Development) Land	-0.4	-0.2
Industrial Land	-5.5	-5.5
Warehouse Land	2.7	2.7
Total Land Need	-3.2	-3.0

Source: Cambridge Econometrics, Blaby District Council, BE Group, 2024 *Buffer not applied to negative figures.

Table ES3 – Blaby OAN Projections – Past Take Up Model, Net of Losses – With a 5-Year Buffer, Hectares*

Take Up Model	Forecast Period	Average Take Up Rate Projected Over the Forecast Periods: Office (inc. Research and Development) Land	Average Take Up Rate Projected Over the Forecast Periods: Industrial Land	Average Take Up Rate Projected Over the Forecast Periods: Warehouse Land	Average Take Up Rate Projected Over the Forecast Periods: Total Land Need
Long Term Take Up Period – 2006-2024	2024-2041 (x23 (years))	7.82	-1.84	23.46	29.44
Long Term Take Up Period – 2006-2024	2024-2046 (x28 (years))	9.52	-2.24	28.56	35.84
Short Term Take Up Period – 2013-2024	2024-2041 (x23 (years))	5.06	-3.91	30.82	31.97
Short Term Take Up Period – 2013-2024	2024-2046 (x28 (years))	6.16	-4.76	37.52	38.92

Source: BE Group, 2025 *Based on past local take up only, excluding all past completions of B8 units larger than 9,000 sqm in size.

- xliv) In terms of a preferred OAN for offices, experience suggests that the quantum of office space required by businesses is strongly driven by the number of staff they must accommodate. Thus, the jobs-based Labour Demand model is likely to best project office sector needs moving forward. As most of the projected jobs growth is in office based sectors, utilising Labour Demand modelling for offices also means that OAN will account for the bulk of the employment change moving forward. Given changing working practices it would be logical to use figures which allow for homeworking.

- xlv) As forecasts of office jobs change are negative overall, reflecting projected losses in Financial and Business Services, there is no requirement to allocate any land specifically to meet office needs. This does not imply that no offices will be built in Blaby District, to 2046, only that there is not a need to allocate sites specifically to meet office requirements. Rather, where viable, offices will be brought forward in mixed-use schemes or through redevelopment/refurbishment.
- xlvi) Requirements for industrial and warehouse premises are more driven by needs for production and storage space than the need to accommodate changing staffing levels. Thus, such companies may have ongoing property requirements even when they are reducing the numbers they employ, particularly if automation is improving productivity per worker. This results in a weaker link to the jobs-based Labour Demand modelling that was true for offices. Additionally, the Labour Demand model forecasts negative or negligible land needs in the industrial sector, in Blaby District, which is at odds with identified market demand. Here, therefore, the Past Take Up model is preferred as it is independent of jobs change projections and based on real world trends. Consequently, the recommended industrial and warehouse sector OAN, with and without the inclusion of larger historical completions of larger than 9,000 sqm each, is:
- 2024-2041 – 21.62-26.91 ha
 - 2024-2046 – 26.32-32.76 ha.
- (N.B. Figures shown represent the warehouse need less the negative industrial need).
- xlvi) In terms of whether the Past Take Up Model should be based on the analysis of short term (2013-2024) or long term (2006-2024) historic completions, (or potentially the period 2011/2012 to 2019/2020 which was used in the HENA, 2022) BE Group would argue the longer period should be favoured. The maximum analysis period, 2006-2024, takes in several periods of growth and recession in the national economy which occurred and which may happen again. In this regard using longer term take up would be consistent with Planning Practice Guidance, specifically Para 027 of 'Housing and Economic Needs Assessments' which indicates that "Authorities will need to take account of longer term economic cycles in assessing this data..."

- xlviii) Although the national recession certainly impacted on the property market since 2013, there will doubtless be further changes to 2046, and while we cannot know what they will be, taking the broadest view on the available data provides the best chance of accounting for uncertainties about the future. Finally, it should also be noted that the differences in outputs between the short and long term forecast models are modest, with the largest variation being an extra 5 ha of requirement on the warehouse need under the short term forecast.
- xlix) For these reasons the full Take Up figures, including larger B2/B8 take up be used to calculate industrial OAN. **This gives needs of 21.62 ha to 2041 and 26.32 ha to 2046.**

Protecting Supplies and Meeting the Industrial/Warehouse Needs

- i) With a realistic 2024 committed employment land supply scenario of to 42.04 ha (assuming Site 1: Land West of St Johns, Enderby remains in the local supply), Blaby District has sufficient employment land to meet its local needs, assuming all sites remain in the local supply. However, this study has still reviewed 15 potential future employment sites through its Call for Sites exercises and plan-making which could meet local needs. Six of the 15 sites are proposed for a mixture of residential, likely including some services, and E(g)/B-Class uses. These sites extend up to 448.48 ha each, in size overall and where possible we have used information provided by site promoters to identify the area of land proposed just for E(g)/B-Class employment. Where such information is not available, assumptions have been made about the amount of local employment land likely to be realistically provided, based on large local employment land allocations elsewhere in Leicestershire.
- ii) Based on available data, and assumptions about the likely size of some sites, gives realistic net supply figure of 116.49 ha. These 15 locations were assessed in terms of their physical constraints, fit to market demand and deliverability and then graded A+ to E, as set out in Table ES4.

Table ES4 – Site Submissions Appraisal by Category

Category	Number of Sites	Land Supply, ha*	Sites Included
<u>A+</u> Unconstrained/Limited Constraints – Strategic/Local Development Options	-	-	-
<u>A-</u> Constrained – Strategic/Local Development Options	6	72.73	<ul style="list-style-type: none"> • EAST001: Land west of the M69, Junction 2 – 20.0 ha • GLE031: Western Park Golf Course – 0.73 ha • GLE032: Land north of Glenfield – 7.0 ha • WHE02: Whetstone Pastures – 15.0 ha (max) • STO026: Land West of Stoney Stanton – 15.0 ha (max) • EELM001: Land north of Junction 2, M69 (Elmesthorpe Parish) – 15.0 ha (max)
<u>B+/B-</u> Unconstrained/Limited Constraints or Constrained – Local Development Options	5	34.19	<ul style="list-style-type: none"> • EBLA002: Land off Lutterworth Road – 3.43 ha • EBLA003: Land west of the A426, Blaby (1) – 4.70 ha (falls within ELB004) • ELB004: Land west of the A426, Blaby (2) – 9.50 ha • ELUB002: Land East of Narborough Wood Park – 7.20 ha • ESHA001: Aston Lane, Sharnford – 14.06 ha.
<u>C</u> Local Scale Mixed Use Sites/Proposed to Meet Specific Business Needs	2	5.40	<ul style="list-style-type: none"> • WHE031: Land south of Whetstone – 4.00 ha • ETHU001: Thurlaston Saw Mill – 1.40 ha.
<u>D</u> Limited suitability for B-Class Uses	-	-	-
<u>E</u> Unlikely to be deliverable development site	2	4.17	<ul style="list-style-type: none"> • EWHE001: Land off Enderby Road – 1.67 ha • BLA034: Land at Hospital Lane, Blaby – 2.50 ha.
TOTAL	15	116.49	

Source: BE Group, 2025

*Land specifically identified for E(g)/B-Class employment uses.

- iii) This Study has analysed these sites and graded them A+ to E. Sites graded A+-B- can be said to represent realistic options for employment land supply, measured against market and deliverability criteria.

Recommendations

liii) This report has had full regard to the requirements of the NPPF and the PPGs to encourage and deliver employment growth through the planning system. The key recommendations are:

- **Recommendation One – Existing Employment Areas to be Retained** – It is recommended that 23 Areas receive protection under the new Local Plan, comprising both previously adopted employment areas, and four other locations identified in this Study
- **Recommendation Two – Defining and Protecting the Current Realistic Land Supply** – For this study, the current realistically available committed employment land supply in Blaby District was 44.03 ha in seven sites. This reduces to 42.04 ha, in six sites, when land only suited for offices is excluded. Sites outside of this realistic employment land supply, were judged not to be readily available to meet employment land needs. In the case of Site 1: Land West of St Johns, Enderby which has a consent for a major B2/B8 scheme and will be the main focus for development, in Blaby District in the short-mid term, it is recommended that Site 1 be protected in the Key Employment Sites policy in the new Blaby District Local Plan. This reflects how previous significant sites the Lubbсторpe Strategic Employment Site, Glenfield Park / Optimus Point and Everards Meadows were protected as Key Employment Sites in the Blaby District Local Plan, Local Plan (Delivery) Development Plan Document (DPD) (2019)
- **Recommendation Three – Defining the Objectively Assessed Need** – It is recommended that Blaby District Council use the Labour Demand model as the main measure of future office land need for the periods 2024-2041 and 2024-2046. This generates no net needs for office employment land, assuming existing stock is retained. In terms of industrial and warehouse needs, it is recommended that Blaby District Council use the roll forward of all Past Take Up, with a 5 year buffer. This indicates needs of:
 - 2024-2041 – 21.62 ha
 - 2024-2046 – 26.32 ha.

Deducting the realistic 2024 committed employment land supply scenario, for industrial/warehouse uses, of 42.04 ha, Blaby District has sufficient land to meet local needs, to 2046 assuming Site 1: Land West of St Johns, Enderby remains in the local supply. If the District Council considers that the Land West of St Johns site forms part of the 'strategic' supply required to meet wider B8 needs, the

emerging Local Plan will need to make provision for additional employment land to meet the residual local requirement identified

The Council should also continue to monitor losses of existing employment land, to non E(g)/B-Class uses, and adjust the supply, if required, to ensure sufficient land is provided to meet the identified needs for the Local Plan period

- **Recommendation Four – Meeting Office Needs** – There is no specific Office OAN in Blaby District. This does not mean that no offices will be developed in the district, only that no specific office based employment land allocations need to be provided for. New office needs will likely be met through the refurbishment of existing premises and the inclusion of office components in mostly industrial/warehouse schemes. However, delivering new offices viably remains difficult, even in Leicester City Centre. Accordingly, it is recommended that the District Council, LCC and other relevant partners support office development in Blaby District. Planning policy should be supportive of office provision in appropriate locations
- **Recommendation Five – Meeting Overall Industrial/Warehouse Needs** – It is not recommended that the Local Plan allocate any further local employment sites, additional to those identified in this Study, unless land West of St Johns is not considered to form part of ‘local’ employment supply and/or there is a need to mitigate the loss of existing local employment land to other, non E(g)/B-Class uses or to strategic employment land allocation. In terms of the quantum and location of strategic needs, the Council will be guided by the Leicester and Leicestershire: Strategic Distribution Floorspace Needs Study as to what strategic employment allocations may be required within the district
- **Recommendation Six – Meeting Local Needs** – To allow further growth away from Enderby and New Lubbethorpe, it is recommended that the Local Plan seek to support the small scale growth and expansion of the 23 Employment Areas identified previously. As noted, opportunities for infill development appear modest and accordingly small scale expansion, appropriate to the scale and location of the area should also be supported, particularly in the rural west of the district
- **Recommendation Seven – Meeting Needs – Encouraging Rural Diversification** – A rural diversification policy is recommended in Blaby District Local Plan Policy which indicates support for E(g)/B2/B8 developments which are appropriate to their location

- **Recommendation Eight – Future Reviews** – Review and monitor the employment land and premises position and undertake the study again in about five years
- **Recommendation Nine – Maintain Awareness of External Influences** – The Councils should continue to work with neighbouring authorities on issues in which interests will overlap.

1.0 INTRODUCTION

- 1.1 This report provides an Employment Land and Premises Study (ELPS) for the District of Blaby (Blaby District, the district). It has been carried out on behalf of Blaby District Council (the Council).
- 1.2 In 2011 BE Group, economic development and property consultants, completed an Employment Land Study to inform the then emerging Blaby District Local Plan Core Strategy. That Core Strategy was adopted in 2013 and is now accompanied by a Delivery Development Plan Document (DPD), adopted in 2019.
- 1.3 The Council is now updating its Local Plan which will provide a blueprint for development in the district up to 2041 and 2046.
- 1.4 Reflecting this, the Council commissioned BE Group to complete an updated evidence base document on employment policy matters. This Study determines overall economic development land needs to 2041 and 2046. The Study was completed over August 2024 – October 2025.
- 1.5 It should be noted that this study considers the local need for, and supply of, employment land in Blaby District only. Strategic needs for B8 logistics, across Leicester and Leicestershire, are considered separately in the ‘Warehousing and Logistics in Leicester and Leicestershire: Managing Growth and Change (2022)’ study and the ongoing “Leicester and Leicestershire: Strategic Distribution Floorspace Needs Update and Apportionment” study.

Study Objectives

- 1.6 The Overarching Study Objectives, as set out in the Study Brief, are:
1. “To identify the quantity of local employment land (B1, B2 and B8) required in Blaby District during the plan period up to 2041 and 2046. The evidence contained in the report will inform policies and allocations in the emerging Local Plan
 2. To identify recent economic and employment trends and how these might impact on future development in the area and whether the existing employment allocations and sites are fit for purpose to meet this growth
 3. To understand the overall employment market within the district, across the different sectors.

- 1.7 The study should be mindful of, and align with, other studies that provide evidence relating to the provision of employment land. These include the Housing and Employment Needs Assessment, employment land and premises studies for neighbouring Local Planning Authorities within the Functional Economic Market Area and the Warehousing and Logistics in Leicester and Leicestershire study.”

Methodology

- 1.8 The ELPS comprised several stages:
- Market Assessment – Reviewed the current market demand for employment land and premises analysing socio-economic data on sectoral change and transactional/vacancy data, sourced from EGi Radius. This quantitative data was supported by engagement with property market stakeholders to provide a full picture of the market. The district level analysis was expanded upon to review the property market within Blaby District’s wider Functional Economic Market Area (FEMA) through desktop analysis of employment and planning strategies, and consultations with officers from the constituent local authorities
 - Assessment of Employment Sites and Premises – Reviewed the developed and committed supply of employment land and premises which can meet both present demand and future needs. Work included analysis of developed Employment Areas and undeveloped sites through site visits, reviews of planning consents, physical constraints and past sales/lettings on sites, via the Nimbus database and utilising Valuation Office (VOA) data. Landowners, developers and their agents were interviewed to identify plans for change
 - Future Need – Used recognised methods of Labour Demand, utilising Cambridge Econometrics forecasting, and Past Take Up analysis to project the future employment land needs to 2041 and 2046
 - Comparing Need/Demand and Supply – Identifying what additional/alternative supply may be required. Included consideration of the deliverability and market fit of potential employment growth opportunities which may meet additional needs, comprising options submitted in Call for Sites exercises.
- 1.9 The methodology follows Planning Practice Guidance on employment land reviews and with consideration of national, sub-regional and local planning policy, research and policy guidance.
- 1.10 A list of those consulted is provided at Appendix 1.

Employment Land Review Guidance

- 1.11 A key reason for undertaking the updated ELR is to take account of updated Planning Practice Guidance (PPG), which provides guidance on how local authorities should approach both housing and employment land reviews. Two guidance notes were produced in 2014 and updated over 2018/19 – “Housing and Economic Land Availability Assessment” which provides a methodology of reviewing suitable land, and “Housing and Economic Needs Assessments”, which provides guidance on how future needs can be determined. A third PPG “Effective Use of Land” (2019) provides advice on assessing whether existing employment allocations should be protected or reallocated for a more deliverable use.
- 1.12 The assessment process takes the form of a five-stage methodology under the following headings:
- **Stage 1: Identification of sites and broad locations** to provide an audit of available land of 0.25 ha and above. This will be a review identifying as wide a range as possible of sites and broad locations for development (including those existing sites that could be improved, intensified or changed). Identification methods may include a public ‘Call for Sites’ exercised by the local authority. The outcome of this stage is to understand key employment land supply issues and generate a portfolio of potential employment sites to take forward for more detailed review.
 - **Stage 2: Site/broad location assessment** to estimate the development potential. This will include a re-appraisal of the suitability of previously allocated land, and the potential to designate allocated land for different or a wider range of uses. This stage entails a qualitative review of all significant sites and premises for their ‘suitability’, ‘availability’ and ‘achievability’ to confirm which of them are unsuitable for/unlikely to continue in E(g)/B2/B8 employment use; to establish the extent of ‘gaps’ in the portfolio; and if necessary, identify additional sites to be allocated or safeguarded. This exercise will help to inform whether a site is ‘deliverable’, ‘developable’ or neither. In assessing the portfolio, factors which need to be considered include:
 - “The best fit functional economic market area
 - The existing stock of land within the area - this will indicate a baseline for land in employment uses
 - The recent pattern of employment land supply and loss, based on planning permissions/planning applications (or loss to permitted development)

- Market demand – sourced from market intelligence from local data and discussions with developers and property agents, recent surveys of business needs or engagement with business and economic forums including locational and premises requirements of particular types of business
- Market signals – based on projected growth in the certain markets and demographic changes and
- Oversupply and evidence of market failure – such as physical or ownership constraints that prevent the employment site being used effectively.”
- When considering whether there is a realistic prospect of an existing employment site being developed for its intended use, PPG Effective Use of Land suggests that the following factors be considered:
 - “The length of time since the site was allocated in the development plan
 - The planning history of the site including any planning applications or pre-application enquiries
 - Whether there is evidence that the site has been actively marketed for its intended use for a reasonable period, and at a realistic price; and
 - Whether there are any changes of circumstance that mean that take-up of the site for its intended use is now unlikely.
- Where an alternative use for the allocated site is proposed, it will also be relevant to consider the extent to which evidence suggests the alternative use would address an unmet need, as well as the implications for the wider planning strategy for the area and other development plan policies.”
- **Stage 3: Windfall assessment** Not applicable as relates to housing only.
- **Stage 4: Assessment review** ascertaining the need for economic development uses. To understand the future quantity of land required across the main business sectors; to provide a breakdown of that analysis in terms of quality and location and provide an indication of ‘gaps’ in supply through economic forecasting, consideration of recent trends and/or assessment of local property market circumstances. Preferred forecast methods include:
 - “Sectoral and employment forecasts and projections (labour demand)
 - Demographically derived assessments of future employment needs (labour supply techniques)
 - Analysis based on the past take-up of employment land and property and/or future property market requirements”

This is combined with “consultation with relevant organisations, studies of business trends, and monitoring of business, economic and employment statistics.”

The outcome of this stage is to provide broad quantitative employment land requirements across the principal market segments covering the district’s Local Plan period and an analysis of the likely ‘gaps’ in supply that need to be filled

- **Stage 5: Final evidence base**, the outcome of which will be the completion of the employment land review, to be taken forward in the Local Plan. The ELPS is prepared in line with this advice.

1.13 Table 1 shows how the ELPS aligns with this Guidance. The link between the report and the PPG methodology is not always clear cut, with different sections overlapping, indeed certain steps overlap.

Table 1 – Employment Land Reviews – PPG Guidance

Stage 1 – Site / Broad Location Identification	
Determine assessment area and site size	Undertaken by Blaby District Council
Desktop review of existing information	Review of the policy position, socio-economic position, local/sub-regional property market and the 2024 land supply (Covered in Sections 2, 3, 4, 5)
Call for sites / broad locations	Call for Sites exercises completed internally by the Council.
Site / broad location survey	Review of available employment sites. Broad locations to meet future land needs completed in Conclusions and Recommendations. (Covered in Sections 6, 8, 9 and Appendices)
Stage 2 – Site / Broad Location Assessment	
Estimating the development potential in parallel with assessing suitability, availability, achievability – including viability	Covered in Section 5 and Appendices
Overcoming constraints	Covered in Section 5 and Appendices
Stage 3 – Windfall Assessment	
Determine housing / economic development potential of windfall sites (where justified)	N/A
Stage 4 – Assessment Review	
Review assessment and prepare draft trajectory; enough sites / broad locations?	Section 6
Stage 5 – Final Evidence Base	
Step 12 – Evidence Base and monitoring	ELPS produced by BE Group and monitoring undertaken by the Council

Source: BE Group, 2025

2.0 STRATEGIC AND POLICY CONTEXT

Introduction

- 2.1 This section focuses on national, regional, sub regional and local reports and strategies that measure supply and demand, for employment land in Blaby District. More general policy is not reviewed unless it has specific relevance to sites or key aspects of the local property market.
- 2.2 Please note that strategies relating to Blaby District's neighbours are included in Section 4.0 on the Functional Economic Market Area. Data from relevant Authority Monitoring Reports is incorporated into Objectively Assessed Needs (OAN) forecasting undertaken in Section 6.0.

National Planning Policy

- 2.3 This sub-section considers national policy, relevant to the completion of this Employment Land and Premises Study. Planning Practice Guidance, relevant to Employment Land and Premises Reviews, was considered in Section 1.0.

National Planning Policy Framework (NPPF), December 2024 (including minor amendments as of February 2025)

- 2.4 The framework set out planning policies for England and the ways in which they can be applied. The NPPF has been updated with the change of government in 2024, including new direction on development, particularly regarding driving housing growth.
- 2.5 The NPP introduction states that it *“provides a framework within which locally prepared plans can provide for housing and other development in a sustainable manner”* (Paragraph 1). The NPPF must be considered when developing local authority development plans and is a material consideration in planning decisions.
- 2.6 Section 2 ‘Achieving Sustainable Development’ notes that “The purpose of the planning system is to contribute to the achievement of sustainable development, including the provision of homes, commercial development, and supporting infrastructure in a sustainable manner. At a very high level, 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” (Paragraph 7).

- 2.7 Three overarching objectives are given to help the planning system achieve sustainable development. Most relevant here is the economic objective (Objective a) which requires that planning policy and practice "...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" (Paragraph 8).
- 2.8 Planning should also operate with a presumption in favour of sustainable development (Paragraph 11). For plan making, this means:
- "a) all plans should promote a sustainable pattern of development that seeks to: meet the development needs of their area; align growth and infrastructure; improve the environment; mitigate climate change (including by making effective use of land in urban areas) and adapt to its effects
 - 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."
- 2.9 The Framework also now requires local plans to look 30 years ahead where large-scale development forms part of the areas strategic policy, "to take into account the likely timescale for delivery" (Paragraph 22).
- 2.10 Chapter 6 'Building a Strong, Competitive Economy' states that "planning policies and decisions should help create the conditions in which businesses can invest, expand and adapt. Significant weight should be placed on the need to support economic growth and productivity, considering both local business needs and wider opportunities for development" (Paragraph 85). The chapter outlines how planning policies should support economic growth including through having a clear vision and strategy, identifying strategic sites, meeting the needs of the modern economy, addressing barriers to investment and incorporating flexibility.

- 2.11 “Planning policies and decisions should account for locational requirements of difference sectors, including making provision for:
- a. clusters or networks of knowledge and data-driven, creative or high technology industries; and for new, expanded or upgraded facilities and infrastructure that are needed to support the growth of these industries (including data centres and grid connections)
 - b. storage and distribution operations at a variety of scales and in suitably accessible locations that allow for the efficient and reliable handling of goods, especially where this is needed to support the supply chain, transport innovation and decarbonisation; and
 - c. the expansion or modernisation of other industries of local, regional or national importance to support economic growth and resilience” (Paragraph 87).
- 2.12 Guidance for the use of land for employment, and other sites, is contained in Chapter 11 on ‘Making Effective Use of Land.’ “Strategic policies should set out a clear strategy for accommodating objectively assessed needs, in a way that makes as much use as possible of previously developed or ‘brownfield’ land” (Paragraph 124).
- 2.13 Paragraph 127 encourages reallocating land where there is no reasonable prospect of an application coming forward for the allocated use. Specifically Local Planning Authorities should:
- “As part of plan updates, reallocate the land for a more deliverable use that can help to address identified needs (or, if appropriate, deallocate a site which is undeveloped)
 - In the interim, prior to updating the plan, applications for alternative uses on the land should be supported, where the proposed use would contribute to meeting an unmet need for development in the area.”
- 2.14 Local planning authorities should also take a positive approach to applications for alternative uses of land which is currently developed but not allocated for a specific purpose in plans, where this would help to meet identified development needs. In particular, they should support proposals to ... use retail and employment land for homes in areas of high housing demand, provided this would not undermine key economic sectors or sites or the vitality and viability of town centres, and would be compatible with other policies in this Framework” (Paragraph 128).

Use Class Order Amendments, September 2020

- 2.15 As of September 2020, changes have been made to the Use Classes Order which mean that Use Classes A1, A2, A3 and B1 are now to be treated as Class E. The B1 class has been changed to E(g) and defined as “ [Employment] Uses which can be carried out in a residential area without detriment to its amenity.” E(g) is further separated into three sub-categories which reflect the previous a, b, c division of the B1 Use Class:
- E(g)(i): Offices to carry out any operational or administrative functions (former B1(a))
 - E(g)(ii): Research and development of products or processes (former B1(b))
 - E(g)(iii): Industrial processes. (former B1(c)).
- 2.16 Class D (Non-residential Institutions, and Assembly and Leisure) has also been redefined to newly introduced Classes E and F, with Class F comprising of Local Community and Learning premises. D1 is split out and replaced by the new Classes E(e-f) and F1. D2 is split out and replaced by the new Classes E(d) and F2(c-d) as well as several newly defined ‘Sui Generis’ uses, including:
- Pubs, wine bars and other drinking establishments (including those with expanded food provision) (Former A4)
 - Hot food takeaways (Former A5)
 - Live music venues
 - Cinemas, concert halls, bingo halls and dance halls.
- 2.17 The residential (C classes), general industrial (B2) and storage and distribution (B8) use classes remain unchanged.
- 2.18 The E Class brackets together a wide variety of uses, all of which are now considered to be in the same use class:
- Retail
 - Restaurants
 - Financial, professional, or other commercial services
 - Publicly accessible indoor sport, recreation, or fitness
 - Publicly available medical or health services
 - Crèches, day nurseries and day centers
 - Offices, including research and development
 - Industrial uses which do not harm amenity.

- 2.19 Planning permission is not required for changes of use within the same use class, including the new E Use Class, unless local planning authorities create some locally specific restrictions in local policy. This means that many types of business user will be able to change the uses of properties without seeking planning permission. For example, under the new use class order, a shop will be able to change to an office and then to a gym and back again, without planning permission. Amongst other impacts, this will make it more difficult for local planning authorities to monitor changes of use within local commercial premises as there is no longer an automatic requirement for property owners/occupiers to engage with councils when making now permitted changes.
- 2.20 In order to change the uses within a class, there must have been actual and lawful use (If the building is not being used or occupied for the use permitted under an existing planning permission, it will need to be brought into that use before it can then change to another use within Class E).
- 2.21 The government has said that the main driver of the changes has been the need to enable the repurposing of buildings on high streets and town centres. The new Class E allows for a mix of uses to reflect changing retail requirements. It will allow a building to be used flexibly by having several uses taking place concurrently or by allowing different uses to take place at different times of the day. The aim is for this to support the high street revival and allow greater flexibility to change uses within town centres without the need for planning permission.
- 2.22 The Government has also implemented separate changes to permitted development rights. These include allowing the demolition and rebuilding of single and detached vacant and redundant office and light industrial buildings into dwellings, without planning permission subject to a number of restrictions and limitations set out in the General Permitted Development Order.
- 2.23 To implement this will require prior approval from the local authority prior to commencement of the development. This includes approval in respect of transport and highway matters, contamination risks, flood risk, the design of the new building, the external appearance of the new building, the provision of adequate natural light in all habitable rooms of the new dwellings, impact on amenity of the existing building and neighbouring premises including overlooking, privacy and loss of light, impact of noise from commercial premises on intended occupiers, impact upon heritage and archaeology, method of demolition of the old building, plans for landscaping, air traffic and defence asset impacts, and the impact on any protected vistas.

2.24 For Blaby District, the practical effects are likely to include:

- Some impacts on the supply of town centre office stock, with some properties converted from office to retail, leisure and other town centre services. However, as many local retail and leisure markets continue to remain suppressed following the Covid-19 Pandemic and reflecting ongoing economic uncertainty, the real impacts on the comparatively small town centres of Blaby District are likely to be modest.
- This new flexibility has no spatial considerations and therefore will apply outside of town centres as well. It thus has the potential to result in the introduction of non-office type activities, including retail, in out of centre business parks, which runs contrary to national and local planning policies designed to protect town/city centre retail. It is unlikely that Grove Park, a well occupied office and logistics park, of strategic scope, will see large scale changes of use, particularly as there are so many retail/leisure services on adjoining sites. However, lower quality local industrial and office schemes may prove more vulnerable.
- Some conversion of light industrial stock to retail/leisure uses is likely, on sites with good main road access, or in settlement locations, particularly as retail/leisure uses may be able to pay higher rents than traditional industrial and warehouse businesses. However, this continues existing trends which have seen uses such as gyms be accommodated on industrial estates. On a small scale such conversions can be welcome as they deliver useful services on local industrial estates, generate footfall outside of normal business hours, provide viable uses for older stock and increase the attractiveness of estates to occupiers. Large scale conversions would have a significant impact on the stock available to meet the needs of industrial and warehouse businesses and create incompatibilities between uses (for example, retail next to heavy industry) although in the short term, a depressed retail/leisure market makes extensive losses unlikely.

2.25 There will also be policy impacts as Local Plan policies which seek to protect specific uses in the town centre, or office space within designated areas, will no longer be up to date.

2.26 Landlords will also need to be particularly aware of the new arrangements when looking at leases and the extent of use that is authorised. Allowing too broad a permitted use could now result in undesirable changes of use within the scope of the lease, and landlords will not be able to fall back on the planning system to prevent such changes.

- 2.27 The changes will also have an impact on property valuation. For example, a property which has achieved a desirable change of use may now find that any such extant permission is unnecessary and does not result in an uplift in value. Similarly, there is likely to be a levelling-out of values for properties within the new use class, given the interchangeability of uses therein.
- 2.28 A detailed breakdown of losses, from employment land monitoring is not available to see if losses of E(g)/B-Class stock to other uses have increased overall since 2020. However, in Section 5.0, 26 defined Employment Areas (industrial estate, business parks, etc.) are reviewed considering, amongst other factors, what proportion of the premises are in uses other than E(g), B2, B8 and if that proportion in other uses has increased recently.

Sub Regional Economic Policy

- 2.29 Relevant economic policy documents produced by Leicestershire County Council (including the former the Leicester and Leicestershire Local Enterprise Partnership (LLEP)) and/or the Leicester and Leicestershire local authorities working together, are reviewed here. Key are the assessments of sub-regional employment land needs, both general office, industrial and warehouse requirements and strategic logistics requirements.

Strategic Growth Plan: Leicester and Leicestershire 2050: Our Vision for Growth – LLEP and Leicester and Leicestershire Authorities (2018)

- 2.30 The vision of the Strategic Growth Plan is that: “By 2050, Leicester and Leicestershire will have established itself as a driver of the UK economy, exploiting opportunities for linkages across its diverse economic base, supporting its urban and rural centres, and taking advantage of its exceptional location. Growth will contribute to people’s health, happiness and well-being through the timely delivery of well-designed and high quality development, raising the bar in terms of environmental standards, quality of life and local distinctiveness.”
- 2.31 The four priorities of the Strategic Growth Plan are:
- “Creating conditions for investment and growth - balancing the need for new housing and jobs with protection of our environment and built heritage
 - Achieving a step change in the way that growth is delivered – focusing more development on strategic locations and less on non-strategic sites
 - Securing essential infrastructure that is needed to make this happen, taking advantage of proposals to improve national and regional networks

- Maintaining the essential qualities of Leicester and Leicestershire and delivering high quality development.”

2.32 The overall strategic development strategy “proposes to build more development in major strategic locations and to reduce the amount that takes place in existing towns, villages and rural areas. This will allow us to plan for new housing and employment together with new and improved roads, public transport, schools, health services, local shops and open space.” Appropriate infrastructure will be provided to deliver strategic sites.

2.33 A common agenda in Leicester and Leicestershire will be delivering garden towns, villages and suburbs within its strategic growth areas along transportation corridors. “This reflects the settlement pattern of the City and County and establishes a framework for protecting the valuable assets that we have. It also allows us to develop a strong agenda around social, economic and environmental priorities.”

2.34 Blaby District, and its settlements, are not directly referred to in the Plan, although its definition of Leicester, the ‘Central City’, extends into the Leicester Principal Urban Area (PUA) of Blaby District and Charnwood. Leicester has a pivotal role to play in the strategy and “should develop its role as the ‘central city’ supporting the market towns and rural areas around it.” Developing housing, employment facilities and other infrastructure in the City Centre will “relieve development pressures in other parts of the surrounding authorities. Given the scale of development on the fringes of Leicester, any growth would need to be accompanied by measures to increase capacity on the radial roads and improve public transport, cycling and walking.”

2.35 The Plan also discusses the A46 Expressway scheme, but this was subsequently cancelled in 2020. Improvements to the A5 Corridor are discussed, primarily in relation to the major industrial and logistics schemes now in place in Harborough and Hinckley and Bosworth, but with economic benefits extending into Blaby District. “Improvement of the A5 corridor is essential to reduce congestion in the area, to deliver already planned housing growth and to support delivery of major industrial sites which already have Local Plan allocations and/or planning permission. There are long-standing proposals, promoted by the A5 Partnership, to improve the A5 from Dodwells to Longshoot, widening to dual carriageway a short section of the A5 near Hinckley, which carries the traffic of both the A5 and the A47. The A5 Partnership proposals also call for improvements to upgrade the A5 between the A38 and the M1 to ‘expressway’ standard. This is supported by the Midlands Connect Strategy and will provide an efficient alternative route to the M6.”

General Employment Land Needs

Leicester and Leicestershire Housing and Economic Needs Assessment – Leicester and Leicestershire Authorities (2022)

- 2.36 A Housing and Economic Needs Assessments (HENA) was commissioned jointly by all the local authorities within Leicester and Leicestershire to assess future housing needs, the scale of future economic growth and the quantity of land and floorspace required for B-class economic development uses between 2021 and 2036, 2041 and 2050. “The Assessment is intended to provide updated evidence regarding the overall need for housing, and type and mix of housing needed; together with an assessment of the quantity and type of employment land needed to inform local and strategic plans in Leicester and Leicestershire. It is intended to support a coordinated approach across the Functional Economic Market Area (FEMA) to providing employment opportunities to help with economic recovery / growth following Brexit and the COVID19 pandemic.” It updates the 2017 HENA report.
- 2.37 The HENA considers the need for B-class employment land (B1, B2 and B8 units up to 9,000 sqm in size) across the Functional Economic Market Area. “It considers labour demand (baseline and growth) scenarios provided by Cambridge Econometrics, as well as completions trends using Local Planning Authority (LPA) monitoring data. Consideration is also given to margins for flexibility, vacancy and replacement demand.” These assumptions are summarised in Table 2 below:

Table 2 – Overview of Modelling Assumptions

Scenario	Key Assumptions
Labour Demand	<ul style="list-style-type: none"> Based on a 45 sector Cambridge Econometrics Employment densities (sqm per FTE job) from HCA Employment Densities Guide: 3rd Edition Plot ratio assumptions of 2.0 for offices in Leicester, and 0.35 elsewhere; with a ratio of 0.40 for industrial and warehouse uses A sensitivity test is undertaken, reducing the office need by 30 percent, to allow for increased homeworking post the Covid-19 Pandemic
Past Completions	<ul style="list-style-type: none"> Projection of past gross completions based on local authority monitoring data.

Source: Leicester and Leicestershire Authorities, 2022

2.38 The preferred modelling for offices is Labour Demand, allowing for projected jobs change, with a 30 percent reduction to allow for the impacts of homeworking. Past completions are the preferred model for industrial/warehouse needs, reflecting the strong ongoing demand for industrial/warehouse premises and the high real world growth seen in completions trends. Further margins are added to the preferred needs to allow for flexibility/choice for businesses (5 years on the industrial/distribution need) and a margin to ensure an ongoing element of vacancy in the stock, again to provide business choice (7.5 percent increase on the industrial/distribution need). Table 3 summarises the resulting needs, for Blaby District, over the three forecast periods.

Table 3 – Blaby District Employment Land Needs 2021-2036, 2041 and 2050, ha

Forecast Period	Premises Type: Offices incl. R and D	Premises Type: Industrial and Distribution	Premises Type: All Employment Land
2021-2036	9.1	29.0	38.0
2021-2041	11.4	34.7	46.1
2021-2050	15.5	45.0	60.5

Source: Leicester and Leicestershire Authorities, 2022

2.39 It is expected that office needs, outside of Leicester at least, will be met through small flexible spaces in the short term, likely refurbishments rather than new builds, reflecting viability issues. Larger office requirements are likely later in the plan period(s) assuming employment growth achieves levels forecast. The potential to repurpose redundant retail space to deliver office floorspace in town centres should be supported. Research and Development (R and D) is possible in higher end business parks and distribution parks but will likely be focused on the sub-region's science parks.

2.40 The key locations of demand for industrial and local distribution uses are accessible locations close to the labour force ideally at motorway or A road junctions. Mid-sized and smaller stock opportunities should be considered as intensification or extensions of existing estates around the sub-region.

**Leicester and Leicestershire Housing and Economic Development Needs
Assessment: Employment Distribution Paper – Leicester and Leicestershire
Authorities (2022)**

- 2.41 This study provides advice on the distribution of unmet employment needs (2021-36) drawing on emerging evidence from the HENA study as well as that provided in Local Plans, supporting evidence and other planning commitments. For Blaby District the identified needs were for 9.1 ha of office land and 29.0 ha of industrial/distribution needs to 2036. Against this need, the identified supply in Blaby District, as of this Study, was 10.5 ha of office land and 13.3 ha of industrial/distribution land. Thus, Blaby District had a supply shortfall of 15.7 ha of industrial land, but sufficient land to meet office needs.
- 2.42 The general recommendations for meeting needs were that “Mid-sized and smaller stock opportunities should be considered as intensification or extensions of existing estates around the FEMA often in proximity to local settlements... Urban extensions or other future growth locations such as Leicester south-eastern growth corridor present an opportunity to support the delivery of new employment spaces of smaller and mid-sized units where well connected to the road network. Smaller units tend to rely on closer proximity to the population centres due to the nature of occupiers.”
- 2.43 Separately, the study considers how the further needs of Leicester, some 23.3ha, can be met in the wider sub-region. The core conclusion is that well connected sites in Charnwood, Blaby District, Harborough, Oadby and Wigston are best placed to meet that need. Ultimately, land in Charnwood was designated to meet this requirement (as set out in the Statement of Common Ground relating to Housing and Employment Land Needs – Leicester and Leicestershire Authorities (2022)) and the Charnwood Local Plan which sets this out is currently the subject of an Examination in Public (See Section 5.0).
- 2.44 “In the longer-term strategic infrastructure improvements could open up new opportunities for employment development around the south and east of the Leicester Urban Area. Consideration might also suitably be given to whether further sites in Blaby on the west of the city can also be brought forward in due course to contribute to maintaining a longer-term supply of attractive employment sites in the Leicester area.”

Strategic Logistics Land Needs

- 2.45 It should be noted that work on the need for, and distribution of the supply of, logistics land in Leicester and Leicestershire is ongoing. The studies discussed here show the sub-regional position as of autumn 2024.

Warehousing and Logistics in Leicester and Leicestershire: Managing Growth and Change – Leicester and Leicestershire Authorities (2022)

- 2.46 This Study considered the current and future needs for rail and non-rail related logistics (premises of more than 9,000 sqm) in Leicester and Leicestershire, against supply, over the period 2020 to 2041.
- 2.47 The need for strategic logistics was assessed through labour demand forecasting and recent completions trends. The labour demand model, based on an employment forecasting model produced by Oxford Economics (OE), estimated the number of jobs predicted to exist across the Leicester and Leicestershire local authorities to 2041. Job growth was converted into full time equivalent (FTE) jobs, then to floorspace using employment densities in accordance with HCA guidance. Finally, a plot ratio of 40 percent was used to arrive at a surplus of need of 12.2 ha to 2041, across Leicester and Leicestershire. A sensitivity was undertaken where specific two-digit sectors that would be associated with strategic warehousing are isolated (growth only model) were used, giving an increased land need from those sectors only, of 40.8 ha to 2041.
- 2.48 The forward projection of past completions since 2012/2013 suggested a need of 2.7 million sqm of floorspace or 701 ha of land to 2041.
- 2.49 Additionally, the Study estimated that around 70 percent of the existing warehouse stock in the region will require replacement based on a 30 year lifespan of units, as historic stock is unable to meet the demands of modern needs (power, height, size etc). This could generate replacement stock needs of 1.215 million sqm to 1.620 million sqm. At the same time an extra 5.2 million tonnes of freight can be expected to pass through large scale distribution centres in 2041 compared with 2019. For road data, an additional 7.8 million tonnes can be expected to pass through large scale distribution centres in 2041 compared with 2019. This through-put of goods, or traffic growth, was considered as the primary driver of demand for additional floorspace alongside replacement demand under this model. For Leicestershire the 'high replacement, forecast traffic growth sensitivity' scenario could be expected to generate a gross new-build need of just over 1.9 million sqm to 2041 which was recommended as the preferred rate for planning policy development.

- 2.50 Of these models the use of the Replacement and Traffic Growth model for forecasting appeared most reasonable going forwards. Allowing for a high replacement demand, higher sensitivity traffic growth need, a figure of 2.571 million sqm is the recommended need, to 2041 (including a flexible margin of 643,000 sqm based on average 5 year completions).
- 2.51 Net of existing supply, the further needs of 768,000 sqm or 307 ha was identified for rail-served needs and 392,000 sqm or 112 ha for road (non-rail) need. This assumes that 43 percent of needs will be on rail related sites, which reflects an expected increase in rail orientated freight in the future.
- 2.52 Areas of opportunity for development sites which could meet those needs included locations with the following attributes:
- Good connections with the strategic highway network
 - Appropriately located relative to the markets to be served
 - Offer modal choice
 - Sufficiently large and flexible
 - Served from an electricity supply grid with sufficient capacity
 - Accessible to labour
 - Located away from incompatible land-uses.
- 2.53 “It is recognised that future needs may be met by refurbished units built since the 1990s however insufficient evidence exists at the present time to indicate whether this will be sufficient to reduce the overall demand for new sites.”

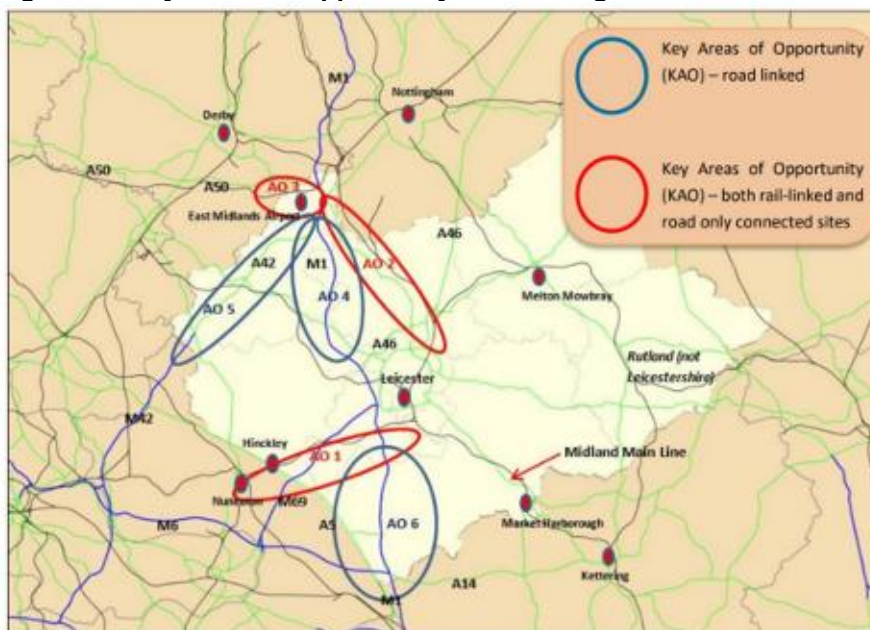
**Statement of Common Ground relating to Strategic Warehousing and Logistics
Need – Leicester and Leicestershire Authorities (2021)**

- 2.54 This Statement of Common Ground considered how the needs identified in the above Warehousing and Logistics in Leicester and Leicestershire: Managing Growth and Change study can be planned for in Leicester and Leicestershire. Net of supply, the identified need was for 768,000 sqm or 307 ha of rail-served needs and 392,000 sqm or 112 ha for road (non-rail) need. The latter need figure reduces to 301,293 sqm not including the recent consents in North West Leicestershire.

2.55 In this Statement of Common Ground, the Combined Leicester and Leicestershire Authorities agreed that the current supply of large warehousing and logistics was strong. “For rail served sites a supply shortfall starts to emerge around the mid-2020s. For non-rail served sites a supply shortfall starts to emerge in the mid-2030s.”

2.56 It is first assumed that all identified needs for Leicester and Leicestershire will be met inside the sub-region. The Hinckley National Rail Freight Interchange (NRFI), in Blaby District, would have met rail-related needs but has not been approved. This project is discussed further in Section 5.0. For non-rail served sites the agreed Key Areas of Opportunity (KAO) are identified in Figure 1. In the case of Blaby District, the M69 and adjacent rail links are identified as KAO (AO1) for rail and road connected sites. The M1 Corridor, extending south from approx. Narborough, into Harborough, is identified for road linked logistics (AO6).

Figure 1 – Key Areas of Opportunity to Meet Logistics Needs



NB: Boundaries of key areas are not definitive and are shown for indicative purposes only
Source: Leicester and Leicestershire Local Authorities, 2021

- 2.57 Moving forward the authorities agree to do the following (in no specific order):
- “Develop an appropriate system to monitor progress in site allocation, consents and delivery at the L and L level
 - Develop a collective understanding of the geographical distribution and phasing of the current supply
 - Develop a collective understanding of deliverable and developable sites for large warehousing, including through the commissioned Strategic Growth Options and Constraints Study (and other work as appropriate)

- This will help inform an approach to meeting the L and L need which maintains an appropriate supply across the area, in terms of geography and trajectory, as recommended by the study.”

Local Planning Policy

Blaby District Local Plan, Local Plan (Core Strategy) Development Plan Document (DPD) – Blaby District Council (2013)

- 2.58 The Blaby Local Plan, Core Strategy DPD provides a spatial plan for the district up to 2029. It is complimented by the Delivery DPD (2019) which is discussed below. The employment element of the Core Strategy Vision is that “Blaby District will have a prosperous economy, where adequate provision is made for the employment needs of its residents and those who work in the district.”
- 2.59 The Strategic Objectives of the Core Strategy, in terms of the Economy were:
- “10. To provide the appropriate quantity, quality and mix of employment opportunities to meet the needs of the district’s current and future populations, and to meet strategic employment, education and training needs
11. To deliver the transport needs of the district and to encourage and develop the use of more sustainable forms of transport (Including walking, cycling, other forms of non-motorised transport and public transport)
12. To maintain, and where appropriate improve, the position of retail centres within the retail hierarchy. To make sure that the existing centres, primarily Blaby Town Centre, have opportunities to grow in order to enhance their vitality and viability and to prevent expansion of out of town centres (Including the Motorways Retail Area) where this would result in an unacceptable impact on existing centres.”
- 2.60 The Spatial Strategy highlights that “The northern and central areas will be the focus for employment growth. The provision of new employment land will be focussed around the Principal Urban Area. These are the areas of greatest growth and have the greatest potential source of employees. A Strategic Employment Site (of some 30 hectares) has been granted planning permission around junction 21a of the M1. Other large scale employment sites are required to meet identified need. In order to be attractive to the market (and deliverable) they must have strong connections with the strategic road network. A Strategic Employment Site (SES) is proposed as part of the Strategic Growth Area at Lubbesthorpe.

- 2.61 Smaller scale employment opportunities of key employment sites will be allowed in the larger Central villages and the retention of key existing sites encouraged... Rural employment opportunities (mainly in the southern Parishes of the District) will primarily be focussed on re-using former agricultural buildings and sites and the provision and retention of small scale facilities within and adjacent to 'better served' villages."
- 2.62 Policy CS1 – 'Strategy for Locating New Development' notes that most new development will take place within and adjoining the PUA of Leicester. "The PUA comprises the 'built-up' areas of Glenfield, Kirby Muxloe, Leicester Forest East, Braunstone Town and Glen Parva." Development here will include at least 5,750 homes (out of a total district target of 8,740) and 57 ha of employment land (out of a total district target of 68 ha).
- 2.63 Outside of the PUA, development will be focussed within and adjoining Blaby and adjoining 'Larger Central villages' of Enderby, Narborough, Whetstone and Countesthorpe.
- 2.64 "Lower levels of growth will be allowed in the Rural Centre, Medium Central Villages and Smaller Villages where the scale of development will reflect the settlement's range of available services and facilities and public transport alternatives. In each settlement, encouragement will be given to the use of Previously Developed Land (brownfield) and underused land and buildings."
- 2.65 Policy CS3 – 'Sustainable Urban Extension' identifies land west of the M1 as the preferred location for a mixed-use Sustainable Urban Extension (SUE), now known as New Lubbethorpe. Proposals include at least 4,250 new homes, two primary schools, a secondary school, a District Centre, two Local Centres and other small scale retail in locations not served by the other centres and Green Infrastructure. Employment provision is to include up to 2,000 sqm of offices in the District Centre and small workspaces (E(g) Use) in the District and Local Centres. Opportunities for 'live work' accommodation, are also encouraged.
- 2.66 Policy CS4 – 'Strategic Employment Site' identifies Land east of the Warrens (south of the M69) at Enderby as the preferred location for a 21 ha Strategic Employment Site (SES), linked to the SUE mentioned above. The location is proposed for range of E(g), B2, B8 uses. Planning applications for office uses of 2,500 sqm or more "shall be subject to a sequential test and accompanied by an impact assessment."

2.67 Policy CS6 – ‘Employment’ identifies the following provision to meet identified employment land needs:

- A 21 ha (net) Strategic Employment Site (SES) at Enderby
- Some 2,000 sqm high quality office uses and / or research and development premises associated with the development of a District Centre at the Lubbethorpe SUE
- A high quality 30 ha (gross) Strategic Employment Site at Glenfield Park (adjacent to junction 21a of the M1 motorway, now developed as Optimus Point).

2.68 The policy also seeks to enable development of new smaller scale employment uses in other settlements, including office uses of less than 2,500 sqm in defined Town, Village and District centres. “The scale and type of development will be determined by the needs of the area and the ability to accommodate employment growth in light of physical, policy or other constraints.... Suitability of sites will be informed by their ability to accommodate employment growth:

- Without significant harm to amenity
- Which are commercially attractive to the market
- Which are on sites which can be satisfactorily accessed by commercial vehicles (for movement of goods)
- Which are accessible by sustainable modes of transport (including public transport) for employees
- Which are not ‘out of scale’ with their host community in terms of the quantity of additional employment land and the scale of new buildings.”

2.69 The Policy seeks to protect developed employment sites, including industrial estates and business parks, “from non-employment uses (including piecemeal changes to non-employment use), unless it can be demonstrated that such a change of use:

- Could be achieved without resulting in an underprovision of employment land at a local and / or district level
- Would result in demonstrable ‘environmental’ benefits to the immediate area
- Would result in loss of land and/or premises where an independent assessment has indicated that the site is no longer viable and attractive to the market for employment purposes.”

2.70 The re-use of agricultural buildings in rural areas for employment purposes is allowed, where the building is:

- “...structurally sound and capable of conversion without the need for substantial rebuilding or alteration
- Suitable for conversion
- Capable of being developed (including associated external storage, plant or access) without detriment to the residential or environmental amenity of the locality.”

2.71 Also allowed and encouraged is:

- The provision of live-work units on residential proposals, “subject to these being capable of implementation without adverse impacts on amenity”
- Local labour agreements with developers to enable local people to secure employment and skills development
- Local businesses seeking to improve their environmental performance.

**Blaby District Local Plan, Local Plan (Delivery) Development Plan Document (DPD)
– Blaby District Council (2019)**

2.72 The Local Plan Delivery DPD is the second part of the Local Plan. It includes site allocations for housing and employment uses and development management policies that apply across the district.

2.73 Policy SA3 – ‘Employment Land Provision – New Allocation’ notes that out of the Core Strategy target of 68 ha, set out in 2013, only 25.38 ha of that need remained unmet by 2019, after completed sites, land with planning permission and actual and proposed losses of existing employment land and premises, to other uses, were accounted for.

2.74 To meet this need a 33 ha (gross) site, Land West of St Johns, Enderby, is allocated, primarily for B8 storage and distribution uses. “Ancillary uses and B1 (b and c) and B2 uses will be allowed where it can be demonstrated that any adverse transport impacts can be mitigated. Planning applications for B1(a) office uses of 2,500 square metres or more shall be subject to a sequential test and accompanied by an impact assessment.”

2.75 Policy SA5 – ‘Key Employment Sites and Other Existing Employment Sites’ highlights that “Key Employment Sites, as set out on the Policies Map, will be protected for employment uses within use classes B1, B2 and B8 unless it can be demonstrated that:

- a. The change of use is in line with Core Strategy Policy CS6 Employment; and
- b. The property is vacant and has been the subject of genuine marketing for use classes B1, B2 and B8 for at least 18 months, at reasonable market values, and which has proved unsuccessful.”

2.76 The Key Employment Sites are:

- Blaby Industrial Estate, Blaby
- Rose Business Park, Blaby
- Hazel Drive, Braunstone Town
- Braunstone Town Meridian Business Park (with Osiers Business Park and Lubbesthorpe Gateway), Braunstone Town
- Everards Meadow and Police HQ, Enderby
- Grove Park, Enderby
- Mill Hill Industrial Estate, Enderby
- Next PLC, Enderby
- Warren Business Park, Enderby
- County Hall, Glenfield
- Mill Lane Industrial Estate, Glenfield
- Optimus Point, Glenfield
- Oak Spinney Park and Ratby Lane, Kirby Muxloe
- Lubbesthorpe Strategic Employment Site, Lubbesthorpe
- Carlton Park, Narborough
- Coventry Road Industrial Estates, Narborough
- Foxbank Industrial Estate, Station Road, Stoney Stanton
- Cambridge Road Industrial Estates, Whetstone
- Enderby Road Industrial Estates and Grange Business Park, Whetstone
- The Whittle Estate, Whetstone.

2.77 “For other existing employment sites, proposals for non-employment development will be supported where it can be demonstrated that:

- i) The property is vacant and has been the subject of genuine marketing for use classes B1, B2 and B8 for at least 6 months, at reasonable market values, and which has proved unsuccessful
- ii) The site is no longer capable of meeting modern business needs
- iii) The change of use would result in demonstrable ‘environmental’ benefits to the immediate area.”

- 2.78 Finally, Development Management Policy 3 – ‘Employment Development on Unallocated Sites’ notes that “Proposals for new employment development will be directed to employment land allocations, Key Employment Sites and other suitable locations within the settlement boundaries. Where no suitable sites are available, proposals for new employment development (Use Classes B1b and B1c, B2 or B8) will be supported on unallocated sites on the edge of the built up area of the Principal Urban Area, Blaby, the Larger Central Villages, the Medium Central Villages and the Rural Centre where the following criteria are met. Such proposals will:
- a) Demonstrate that the proposal cannot reasonably be accommodated on suitable alternative sites, identified as vacant or developable, within the settlement boundary
 - b) Benefit the local economy and not undermine the delivery of the employment allocations. In particular, proposals that provide affordable accommodation for small and medium sized businesses will be supported;
 - c) Be in line with the criteria set out in Core Strategy Policy CS6 concerning the suitability of sites
 - d) Avoid an increase in traffic generation that would result in severe harm to the local road network
 - e) Give priority to previously developed land and premises.
- 2.79 Non ancillary B1(a) offices is a main town centre use and as such is excluded from the provisions of this policy.”

Planning Policy Evidence Base

Blaby Employment Land Study Refresh – Blaby District Council, 2011

- 2.80 This report assessed the demand, supply and need for employment land and premises (Use Class B) in the District of Blaby. It was carried out by BE Group, for Blaby District Council to underpin and inform the Council’s (then) Local Development Framework and analyse employment land demand, supply and need to 2029.
- 2.81 In terms of the property market, the main Study finding was that industrial need far outweighed office need, certainly in the local market. Requirements were for smaller properties up to 200 sqm for offices; 1,000 sqm for industrial. However, there were much larger office and distribution requirements, as Blaby also had a regional role, attracting companies that would prefer an out-of-town location or that need to be close to the M1. Against this need there were few industrial units on the market.

2.82 The existing land supply as of 31st March 2011 was 23.64 ha, across ten sites, mostly near Leicester if not formally within the PUA.

2.83 The gross land requirement was calculated using a variety of scenarios, including historic take-up, employment-based forecasts and labour supply forecasts. The different scenarios provided a variety of estimates for Objectively Assessed Needs for Blaby District, ranging from a shortfall of 68.2 ha to a surplus of 20.46 ha. All scenario results can be seen in Table 4 below.

Table 4 – Forecast Land Scenarios, 2011-2029

Scenario	Gross Land Need, ha	Existing Land Supply, ha	Net Land Need, ha
Historic Land Take-up	+91.8	23.6	+68.2
Employment Change (including sectoral reductions)	+21.6	23.6	-2.0
Employment Change (no allowance for reductions)	+23.8	23.6	+0.2
Labour Supply Change (100 percent work in Blaby)	+8.25	23.6	-15.35
Labour Supply Change (existing 38 percent ratio of those working in Blaby)	+3.14	23.6	-20.46

Source: BE Group, 2011

2.84 As can be seen in Table 4, the largest estimate for net land need was based on historic land take-up trends. In the Study, BE Group recommended that Blaby District Council use the roll forward of historic take-up as the main measure of Blaby District's future land needs for the period up to 2029. This indicated a need of 91.8 ha to 2029. Measured against the District's then employment land supply, there was a need for a further 68.2 ha.

2.85 To meet the 68.2 ha of further need, reduced to 38 ha following the consent at Glenfield Park, the following recommendations were made:

- Reconsider the district's employment land supply situation, especially for industrial/distribution space, in the PUA and M1 Corridor. "This will allow Blaby to play a stronger role in the sub-regional and regional market and to help address land shortages in neighbouring Leicester"
- Future allocations should include a Strategic Employment Site of 20 ha or more, to meet regional needs

- “Land needs to be allocated close to the strategic highway network where possible. This includes the provision of freehold land and premises (available independent of developers direct to owner-occupiers), which should account for around 20 percent of the total
- Two-thirds of this land needs to be geared towards B1 light industrial, B2 and B8 uses, to compensate for the weight of office sites (or sites that are marketed for offices) that exist currently
- Should any existing sites prove to be undevelopable, then the Council should consider replacing them with more appropriate (and viable) alternatives.
- Consider the feasibility of developing more small, office accommodation and industrial units of up to 500 sqm, to meet the identified shortage of such space
- Continue to encourage rural diversification by allowing conversion of agricultural space for employment uses, this may require public sector support.”

Blaby District: Assessment of Key Employment Sites – Blaby District Council, 2016

2.86 This Study was commissioned in 2016 to provide a “qualitative assessment of existing and proposed employment land in Blaby District.” Such land was assessed in terms of its suitability (fitness for purpose) and deliverability (viability) and measured against a range of physical and market based criteria.

2.87 26 Employment Areas were reviewed comprising:

- Key employment sites: Eighteen assessments for the sixteen key employment sites identified in the above mentioned Blaby Employment Land and Premises Study (2011)
- Primarily employment/business areas: Several Areas, which were identified in the Local Plan 1999 Proposals Map, but not included in the Blaby Employment Land and Premises Study (2011). These comprised the Croft Quarry offices, Croft; Everards Brewery, Enderby; Police Headquarters, Enderby; and County Hall, Glenfield
- Major new and other employment sites: Specifically:
 - Optimus Point, Glenfield
 - Lubbesthorpe, Strategic Employment Site, north of Leicester Lane, Enderby
Everards Meadow, Soar Valley Way
 - Rose Business Park, Blaby.

2.88 The main recommendation of the Study was that the following 21 Employment Areas be designated as key employment sites under Policy CS6 entitled 'Protecting Employment Land,' of the Blaby District Local Plan, Local Plan (Core Strategy) (DPD):

Key Employment Sites: Business Parks

- Carlton Park
- County Hall
- Grove Park
- Next plc.

Key Employment Sites: Strategic Distribution

- Lubbethorpe SES
- Mill Lane Industrial Estate
- Optimus Point.

Key Employment Sites: Mixed Use Commercial

- Blaby Industrial Estate, Blaby
- Cambridge Road Industrial Estates, Whetstone
- Coventry Road Industrial Estates, Narborough
- Enderby Road Industrial Estates and Grange Business Park, Whetstone
- Everards Brewery, Enderby
- Everards Meadow and Police HQ
- Foxbank Industrial Estate, Station Road, Stoney Stanton
- Hazel Drive, Braunstone
- Meridian Business Park (with Osiers Business Park and Lubbethorpe Gateway), Braunstone
- Mill Hill Industrial Estates, Enderby
- Oak Spinney Park and Ratby Lane, Braunstone Frith
- Rose Business Park, Blaby
- The Whittle Estate, Whetstone
- Warren Business Park, Enderby.

2.89 Also that the following five sites be designated as existing employment sites:

Existing Employment Sites: Offices

- Croft Quarry Offices, Croft

- Narborough Wood Park.

Existing Employment Sites: Mixed Use Commercial

- Watergate Lane, Braunstone
- Winston Avenue, Croft
- Wharf Way, Glen Parva.

2.90 The Study also identified the following proposed key employment sites as still having land suitable for development for E(g)/B-class employment uses:

Sites with Planning Permission

- Lubbethorpe Strategic Employment Site, Enderby – Planning permission for 21 ha of employment uses
- Lubbethorpe Gateway – Planning permission for 4,600 sqm of offices
- Lubbethorpe proposed district centre – Planning permission for 2,000 sqm of high quality offices and/or research and development premises associated with the district centre

Development Plots within Recommended Key Employment Sites

- Carlton Park – 1.22 ha is allocated for E(g)/B-Class uses
- LE3, Oak Spinney Park – Planning permission for 2,787 sqm of offices
- Meridian Business Park – 1.89 ha plot to be released by the Highways Agency
- National Grid land, Enderby – Planning permission for 3,739 sqm of industrial and 2,350 sqm of offices for the development for National Grid conditioned storage facility and ancillary offices
- Optimus Point – 10 ha balance of a 26.57 ha site available for E(g)/B-Class uses
- Rose Business Park – Outline planning permission for intensification of the site for E(g)/B-Class uses.

2.91 Other, Area specific recommendations included:

- Meridian Business Park – That the Council should work with the Highways Agency to prepare a concept plan for development of the 1.89 ha site “with a view to identifying access arrangements and most effective site utilisation including opportunities for extension land for existing development The Council is recommended to identify requirements of proposals for in site redevelopment for strategic distribution warehousing units”

- Mill Lane Industrial Estate, Glenfield – The Council should “identify with the owner long term redevelopment options of this 10 ha site to meet requirements for strategic distribution, these include possible reconfiguration of the existing site and new vehicle access arrangements”
- The Whittle Estate, Whetstone – The Council should “prepare Supplementary Planning Guidance setting out requirements for a masterplan for comprehensive mixed use redevelopment of the site for employment and residential uses including guidance on access arrangements, open space and landscaping to separate uses and community facilities”
- Wharf Way, Glen Parva – The Council should “prepare planning guidance for the derelict plot in order to secure a design, layout and landscaping proposals that do not prejudice further regeneration of the area together with contributions towards reconstruction of Wharf Way to a standard for adoption as public highway”
- Quarry Lane, Mill Hill, Enderby The Council should consider deallocation of land at Quarry Lane allocated for employment uses as development is unlikely to proceed.

Other Local Policy

Blaby District Corporate Plan 2024-2028 – Blaby District Council, 2024

2.92 The Vision of the Blaby District Corporate Plan “is to ensure that Blaby District is a great place to live work and visit.” Strategic Themes to meet this Vision include, “Growing and supporting our economy.” To grow the local economy, the Council will look to:

- “...facilitate business growth and development, foster innovation, and promote overall prosperity within our district through economic recovery and growth”
- Improve and extend “the skills of the district’s workforce, thereby creating more opportunities for success. We are equally dedicated to attracting and retaining businesses in our district, cultivating a sense of pride in our district and pinpointing attractive investment prospects. Furthermore, we seek to highlight the unique attributes of our location and what it offers to businesses”
- Set the goal “for the district to be one of Leicestershire’s leading and most welcoming and sustainable tourism destinations, attracting staying and day visitors from across the UK.”

2.93 This will be achieved by:

- “Implement[ing] the actions set out in the Economic Development Framework
- Deliver[ing] the actions set out in the Tourism Growth Plan

- By providing a strong leisure and visitor economy with well-maintained and accessible attractions to encourage visitors to the district.”

Economic Development Framework – Blaby District Council, 2023

- 2.94 “The Economic Development Framework sets out the aspirations of the Council and provides a framework that brings together all economic development activities that are occurring within the district and considers how they complement each other to maximise the benefits for our residents, businesses and visitors.”
- 2.95 The Vision of the Economic Development Framework is: “For Blaby District to be a great place to live, work and visit, with a strong, successful economy where everyone can build dynamic businesses, careers and lives, supported in a green and environmentally friendly way, with superb connectivity.”
- 2.96 To achieve this vision, four overarching objectives are set out:
- “We will focus on attracting higher and better paid jobs, making sure our residents are equipped to access employment in a diverse and Green Economy
 - We will support innovative and enterprising ideas, and make sure businesses of all sizes receive the support they need to thrive and grow
 - We will maximise investment and opportunities by encouraging partnership working and appropriate developments that support sustainable growth
 - The Local Plan will allocate additional employment land to enable growth of the economy over the next 20 years.”
- 2.97 Actions to meet the Vision and Objectives are organised around five Priority Themes:
- Supporting local businesses and innovation
 - Shaping our work and skills agenda
 - Growing and supporting the Green Economy
 - Building pride in place
 - Identifying investable propositions.
- 2.98 Table 5 identifies the challenges to, and opportunities for, growth in relation to the five Priority Themes. Also, the Priority Aims linked to those Themes.

Table 5 – Priority Themes and Relevant Associated Challenges, Opportunities and Priority Aims

Priority Theme	Challenges/Opportunities	Priority Aims
Priority Theme 1: Supporting local businesses and innovation	<p>UK Shared Prosperity Funding – funding to deliver a range of supporting local business initiatives:</p> <ul style="list-style-type: none"> • Tailored business support provision – With a focus on key growing firms • Innovation support • Generic support and membership – Provide opportunity for networking and support through external partnerships and forums • LLEP Growth Hub – “The Business Gateway Growth Hub is an umbrella organisation which brings together business support delivered by multiple agents. Further funding has been awarded to allow continued provision, but with opportunities to shape the support and target areas” • Leicester and Leicestershire Key Account Management Programme – Will deliver a bespoke package of support, tailored to businesses located in our region considered to be key strategic businesses. 	<ul style="list-style-type: none"> • “Develop a programme and initiatives to support innovation and enterprise, that are well signposted • Focus on helping our SMEs to grow and provide a steady source of employment • Consider ways to encourage a diverse range of employment opportunities for our residents.”
Priority Theme 2: Shaping our work and skills agenda	<p>UK Shared Prosperity Funding – funding to deliver a range of supporting local business initiatives:</p> <ul style="list-style-type: none"> • Improve people’s life chances to succeed – Chance to refine, influence and shape the Employment and Skills training • Community, Work and Skills – Work with partners to overcome barriers and provide training, careers advice, apprenticeships and T levels and to help set up a business” • Workplace Digital Skills – The LLEP established a Digital Skills Partnership (DSP) in 2021. “The core funding to support a DSP would be a contribution towards an area-wide co-ordinator and contribution towards a grant scheme for local businesses and local skills delivery partners.” <p>Multiply funding – The current allocation for Multiply funding provides a refreshed basis to work with education and training providers on bespoke training schemes.</p>	<ul style="list-style-type: none"> • “Understand what is meant by “better paid” jobs – what are these and how can this be achieved? • Develop Pathway Model, with a menu of resources • Increase work experience opportunities and voluntary and community sector placements • Increase partnership with providers, schools and higher education facilities • Identify and deliver a range of communications campaigns • upskilling workforce of the future.”
Priority Theme 3: Growing and supporting the Green Economy	<p>UK Shared Prosperity Funding – funding to deliver a range of supporting community and place initiatives:</p> <ul style="list-style-type: none"> • Narborough Station Sustainable Transport – “Feasibility study to support the work being undertaken to establish the options for sustainable transport at Narborough Station” • Rural EV Infrastructure – “As part of the existing FLEX D project to fund pilot 7 solar canopy EV Charge Points across Leicestershire, we are proposing to install public rural chargers and help fund community run EV Car clubs” • Mental Health Plans – New Neighbourhood Mental Health Plans will be created to allow residents to access mental health support from within their local community • Social Prescribing Project – Funding will extend and develop the Social Prescribing service in partnership with our local Primary Care Networks (PCN’s). 	<ul style="list-style-type: none"> • “Develop a programme and initiatives to support businesses within the Green Economy sector • Consider way to encourage further innovation and creative ideas to reduce the Council and district’s carbon emissions • Consider the increasing demand for low carbon, environmentally friendly experiences and the potential opportunities these bring.”

Priority Theme	Challenges/Opportunities	Priority Aims
<p>Priority Theme 4: Building pride in place</p>	<p>Levelling Up Funding – “Potential funding streams which are available that could be secured for the district.”</p> <p>Tourism Growth Plan 2020-2025 – “Aims to increase the number of visitors to the district by 1.3m by 2025, increase the number of tourism jobs by 40% and to grow the value of tourism by £50m by delivering cultural and visitor interventions/projects”</p> <p>Visitor economy jobs – Visitor economy jobs are often low value and seasonal.</p> <p>UK Shared Prosperity Funding – funding to deliver a range of community and place related projects:</p> <ul style="list-style-type: none"> • Tourism Build Back project – To drive forward tourism projects which will support the sector • Business Support Coordinator – Full time officer to be appointed to support the town centre businesses across the district • Sustainable visitor economy campaign – To support tourism and hospitality businesses in reducing their carbon footprints and promoting a greener visitor economy offer in line with local and national climate targets • Taste the Place scheme – Showcasing sub-regional food and drink both to eat, drink, buy, see in production and experience through activities and events • Levelling Up Funding – Potential funding streams which are available • New and existing developments – Such as Fosse Park an Everard Meadows which attract visitors to the area • Accommodation review – To assess the demand for a higher quantity and quality accommodation • Role of technology – Look to create a visitor digital journey to enhance the visitor experience • Connectivity – The district is well connected • Challenges with Perception – There is limited narrative or Sense of Place in Blaby District. 	<ul style="list-style-type: none"> • “To develop new and improve existing products/experiences, which are targeted at the needs and expectations of current and future visitors • To promote Blaby District’s image to local, domestic and international visitors • To support visitor economy operators to develop the business and people skills needed to compete and innovate • To develop a seamless visitor service to create an exceptional visitor experience • To develop and implement future campaigns and initiatives to increase pride in place.”
<p>Priority Theme 5: Identifying investable propositions</p>	<p>Commercial Strategy 2022-2027 – “This strategy sets out the aspirations of the Council and provides a framework that brings together commercial activities that are being pursued across the Council, whilst retaining the clear focus on the customers we serve”</p> <p>UK Shared Prosperity Funding – funding to deliver a range of supporting local business initiatives:</p> <ul style="list-style-type: none"> • Priority Investment Areas Feasibility – Consider to creating action and masterplans for the main priority investment areas • Blaby Civic Buildings Review – “To undertake a review of the civic buildings (but could be extended to include sport, community centres and village halls) and to explore the option of a new Enterprise Hub.” <p>Levelling Up Funding – potential funding streams which are available</p> <p>What does success look like?</p> <p>Gain inward investment through business growth</p> <p>Secure further external funding</p> <p>Be proactive in identifying opportunities for further investments.</p>	<ul style="list-style-type: none"> • “To prepare a clear understanding of the investable opportunities. • To position the council to secure external funding opportunities and inward investment if/when they arise • To focus on partnership working where there are potential inward investment and commercial opportunities on brownfield and/or underused sites • To encourage development which is well considered, sustainable and brings economic benefits to the district • Align aims to aspirations within the Local Plan.”

Source: Blaby District Council, 2023

Neighbourhood Development Plans (NDP)

2.99 Five made plans have been reviewed:

- Blaby Neighbourhood Plan (2018)
- Glenfield Neighbourhood Plan 2022 – 2029 (2023)
- Cosby Neighbourhood Plan (2022)
- Fosse Villages Neighbourhood Plan: Update (Made Version) 2018-2029 (2024)
- Leicester Forest East Neighbourhood Plan (2022).

2.100 Table 6 looks at policy and other comments, relevant to local economies and employment land. The Blaby and Cosby NDPs do not have any specific policies on E(g)/B2/B8 uses. The Glenfield and Leicester Forest East NDPs have specific policies on protecting existing employment uses, supporting new employment development and the physical changes associated in making a dwelling suitable for homeworking.

2.101 Only the Fosse Villages NDP identifies any employment development land, the cement area of Croft Quarry, which is suitable for E(g)/B2/B8 development subject to certain access, environmental and design criteria being met. It also identifies 10 other Employment Areas for more general protection. Of these ESS1 Foxbank Industrial Estate, Stoney Stanton is already protected in the Local Plan Delivery DPD. Two more – EC1 Winston Avenue, Croft and EC2 Riverside Court, Croft – are well established Employment Areas which were identified in the Blaby District: Assessment of Key Employment Sites (2016), discussed above. These are analysed further, along with other established Employment Areas, in Section 5.0.

2.102 The other seven Employment Areas, generally comprise small rural/edge of settlement employment locations, accommodating only a few micro firms, or larger rural facilities but occupied by one business only such as ESS3 Calor gas Centre, Stoney Stanton. These are not reviewed further in this Study, but they do have a role in supporting the rural economy in the west of the district and meeting business needs.

Table 6 – NDP Review

NDP	Economic/Employment Comments
Blaby Neighbourhood Plan	Policies in the Blaby NDP focus on greenspace, housing and design matters. They do not directly discuss E(g)/B-Class employment
Glenfield Neighbourhood Plan 2022 – 2029	<p>Three of the NDP's nine objectives are relevant to E(g)/B-Class Employment:</p> <p>“3) New employment initiatives that are sensitive to the character of the Plan area and avoid harmful impacts such as increased traffic (without mitigation), parking problems, air quality, the preservation of historic/heritage assets, residential amenity and the local environment will help to boost and diversify the local economy.</p> <p>4) The Neighbourhood Plan seeks to up-skill the workforce as overall Glenfield has a disproportionate percentage of warehousing, distribution and service jobs which with the demographics of the village mean a lot of people travel into the village to work. The absence of suitable jobs also involves residents travelling elsewhere to work and this adds to the traffic problems and pollution levels</p> <p>5) Home working is supported to promote opportunities within the village to allow businesses to develop and grow. The provision of business hubs, meeting spaces and workshops could create opportunities for villagers. The Neighbourhood Plan recognises the need to extend or convert suitable buildings to accommodate such businesses provided it does not adversely affect neighbours. It will be important that any future housing and developments within the parish should consider accommodation that can promote home working and local employment.”</p> <p>‘Policy CC4: Homeworking’ notes that proposals, outside of Permitted Development rights, to use of part of a dwelling for office and/or light industrial uses will be supported were the new use will “not result in unacceptable traffic movements” or parking impacts; will not result in dust, noise of other issue which might affect the amenity of neighbouring dwellings and any extension or free standing structure resulting will be appropriate to its location in design terms.</p> <p>The NDP also has two specific employment policies:</p> <ul style="list-style-type: none"> • ‘Policy E1: Support for Existing Employment Opportunities’ – Provides for a presumption against the loss of existing commercial premises or land (E(g)/B-Class), which provide employment opportunities, unless the premises/land “has not been in active use for at least 12 months” and cannot be reoccupied or redeveloped for employment-generating uses (as demonstrated through a valuation report and a marketing campaign lasting at least six months). • ‘Policy E2: Support For New Employment Opportunities’ – Supports new development where: <ul style="list-style-type: none"> a) It falls within the settlement boundary of Glenfield b) Where possible, it should be sited in existing buildings or on previously developed land c) It is of a size and scale not adversely affecting the character, infrastructure and environment of the area d) It does not involve the loss of dwellings e) It does generate unacceptable amounts of noise, light, etc. pollution f) It contributes to the character and vitality of the local area g) It complements existing businesses and meets design requirements.
Cosby Neighbourhood Plan	Policies in the Cosby NDP focus on greenspace, retail and design matters. They do not directly discuss E(g)/B-Class employment
Fosse Villages Neighbourhood Plan	<p>The NDP includes two employment policies:</p> <ul style="list-style-type: none"> • ‘Policy FV14: Croft Quarry’ – E(g), B2, B8 proposals at the cement area of Croft Quarry will be supported provided: <ol style="list-style-type: none"> 1. “The only vehicular access is from Marion’s Way” 2. The development has a ‘sensitive and responsive’ design

NDP	Economic/Employment Comments
	<p>3. The development proposal is subject to a flood risk assessment</p> <p>4. Within the development proposal, “the potential for multifunctional green infrastructure networks and significant long term positive effects should be maximised.”</p> <ul style="list-style-type: none"> • ‘Policy FV15: Employment Areas’ – Ten Employment Areas are identified in the Policy, which should be safeguarded for E(g)/B-Class uses. These are: <ul style="list-style-type: none"> ○ EC1 Winston Avenue, Croft ○ EC2 Riverside Court, Croft ○ ESH Haulage Site, Aston Lane, Sharnford; ○ ESS1 Foxbank Industrial Estate, Stoney Stanton ○ ESS2 Highfields Farm Enterprise Centre, Stoney Stanton ○ EH1 Elms Farm Industrial Estate, Huncote ○ EH2 Green’s Lodge Farm, Huncote ○ EPM1 Dovecote Court Business Park, Potters Marston ○ ESS3 Calor gas Centre, Stoney Stanton ○ ET1 Sawmill, Thurlaston.
Leicester Forest East Neighbourhood Plan	<p>The NDP includes three employment policies:</p> <ul style="list-style-type: none"> • ‘Policy BE1: Support for Existing Employment Opportunities’ • ‘Policy BE2: Support for New Employment Opportunities’ • ‘Policy BE3: Working from Home.’ <p>The wording of each policy is identical to that of Policies E1/E2 and CC4 of the Glenfield NDP.</p>

Source: Various, 2024

Summary

- 2.103 This section reviewed national, regional and local reports and strategies that have a relevance to the allocation and need for employment land and premises. It is distinct from the consideration of Socio-Economic matters in the section to follow.
- 2.104 The NPPF (Section 2) requires a presumption in favour of sustainable development, to support sustainable development and ensure that Objectively Assessed Needs for uses including employment land are met. Section 6 on 'Building a strong, competitive economy' indicates that planning policy should "help create the conditions in which businesses can invest, expand and adapt" supporting economic growth and productivity and accounting for both local business needs and opportunities for development. Section 11 on making 'Effective Use of Land' encourages reallocating land where there is no reasonable prospect of an application coming forward for the allocated use. Specifically, sites should not be held for E(g)/B-Class Uses if there is no prospect of development being progressed.
- 2.105 The 2020 Use Classes Order Amendment combines the B1 Office/Research/Light Industrial Uses along with the A and partly D1/ D2 uses into a single 'E' Use Class. For Blaby District, the practical effects are likely to include some greater pressure to convert town centre offices to other uses, although the market for many of those alternative uses is suppressed at this time. The Use Class change has no spatial considerations and therefore will apply outside of town centres as well. It thus has the potential to result in the introduction of non-office/non-industrial type activities, including retail, in out of centre business parks, and industrial estates, although this is a trend which has been ongoing for some time and can, in moderation, beneficially diversify local economic activity.
- 2.106 The Leicester and Leicestershire Strategic Growth Plan identifies Leicester, extending to include the Leicester PUA, as the 'Central City' of the county. Developing housing, employment facilities and other infrastructure in the City Centre will "relieve development pressures in other parts of the surrounding authorities." The latest, 2022, HENA Study for the city and county identifies the following employment land (office and industrial/warehouse) needs for Blaby District:
- 2021-2036 – 38.0 ha (9.1 ha for offices/R and D and 29.0 ha for industrial/distribution)

- 2021-2041 – 46.1 ha (11.4 ha for offices/R and D and 34.7 ha for industrial/distribution)
- 2021-2050 – 60.5 ha (15.5 ha for offices/R and D and 45.0 ha for industrial/distribution).

2.107 It is expected that office needs, outside of Leicester at least, will be met through small flexible spaces in the short term, likely refurbishments rather than new builds, reflecting viability issues. Larger office requirements are likely later in the plan period(s) assuming employment growth achieves levels forecast. The potential to repurpose redundant retail space to deliver office floorspace in town centres should be supported. Research and Development (R and D) is possible in higher end business parks and distribution parks but will likely be focused on the sub-region's science parks.

2.108 The key locations of demand for industrial and local distribution uses, to meet these needs, are accessible locations close to the labour force ideally at motorway or A road junctions. Mid-sized and smaller stock opportunities should be considered as intensification or extensions of existing estates. Against identified need figures, Leicester has a requirement of 23 ha which cannot be met within the city boundary. It is agreed that this additional need will be met within Charnwood Borough only.

2.109 The latest, 2022, Leicester and Leicestershire logistics study identifies needs, net of existing supply, of 768,000 sqm or 307 ha for rail-served needs and 392,000 sqm or 112 ha for road (non-rail) need. The M69 and adjacent rail links are identified as an area of search for rail and road connected logistics sites. The M1 Corridor, extending south from approx. Narborough, into Harborough, is identified for road linked logistics.

2.110 The adopted Blaby District Local Plan (Core Strategy) identified a land need of 68 ha, to 2029, reflecting the findings of the 2011 Blaby Employment Land Study Refresh. The bulk of that need is to be met within and adjoining the PUA of Leicester. Key sites to meet this need include the Land east of the Warrens (south of the M69) at Enderby (21 ha) and a high quality 30 ha (gross) Strategic Employment Site at Glenfield Park (adjacent to junction 21a of the M1 motorway, now developed as Optimus Point) as well as employment provision within the New Lubbethorpe SUE.

- 2.111 By the time the Blaby District Local Plan (Delivery) DPD was completed in 2019, only 25.38 ha of the 68 ha need remained unmet. To meet this need a 33 ha (gross) site, Land West of St Johns, Enderby, was allocated, primarily for B8 storage and distribution uses.
- 2.112 The Local Plan (Delivery) DPD also seeks to protect 20 employment areas for B1 (now use class E(g)), B2, B8 and appropriate ancillary uses. These were informed by the 'Blaby District: Assessment of Key Employment Sites' (2016) Study.
- 2.113 Of the five made NDPs in the district, the Glenfield and Leicester Forest East NDPs have specific policies on protecting existing employment uses, supporting new employment development and the physical changes associated in making a dwelling suitable for homeworking. The Fosse Villages NDP identifies the cement area of Croft Quarry as suitable for E(g)/B2/B8 development subject to certain criteria being met. It also identifies ten other Employment Areas for more general protection, the most significant of which are analysed further in Section 5.0.

3.0 PROPERTY MARKET ASSESSMENT

Introduction

3.1 This section considers the demand for and supply of industrial and office property within Blaby District. Commentary is given on national, regional and sub-regional market trends which may impact on the local demand for land and premises. The local commercial market is assessed through a quantitative review of socio-economic and transactional data from the last decade, the local supply of vacant premises, alongside up to date market knowledge from consultations carried out with developers, scheme managers and property agents.

National and Regional Property Markets

3.2 Some brief comments on the wider market are provided below regarding the industrial, logistics and office sectors, along with the wider investment market.

National and Regional Industrial/Warehouse Market	
<ul style="list-style-type: none">• The East Midlands commercial property market enjoyed almost £1.2 billion of investment in 2023, remaining resilient against wider downturns, with continuing investment opportunities (Innes England, 2024).• Strategic scale take-up in, in the East Midlands, in the first half of 2024 has already reached 5.02 million sqft (466,000 sqm) across 11 transactions compared to take-up in 2023 of 8.12m sqft (754,000 sqm) across 26 transactions. The focus of take up is on larger, high specification properties (Savills, 2024).• By comparison, there has been a recent increase in second hand supply returning to the market, which is contributing to growth in vacancy rates in the East Midlands. Generally, these are older B8 units, built before 2000. Recent trends suggest these units may remain unoccupied as occupiers prefer top-tier or custom facilities to enhance supply chain resilience. There will thus be a prolonged period of higher vacancy rates as second-hand supply is absorbed, although new development in the pipeline will address this over time (Savills, 2024).• Demand in the East Midlands continues to be led by retail and wholesale logistics businesses, particularly food and drinks operators, which have accounted for 39-40 percent of regional deals since 2020 (Knight Frank, 2023)• Overall, there remains an imbalance between supply and demand in the East Midlands and whilst some speculatively built space is still in situ and not occupied, there are numerous conversations going on in the background and there is a real lack of good quality or even mid-range second-hand space available across all areas of the Midlands, and much of the rest of England (FHP, 2023).	

National and Regional Office Market

- The longer-term impacts of the working-from-home revolution mean that many businesses have been assessing their real estate footprint, releasing surplus premises, and the three-day office week has emerged as the new normal
- Where companies are seeking space there is a much greater focus on buildings that are sustainable and energy-efficient, as occupiers try to meet increasingly ambitious Environmental, Social, and Governance (ESG) aspirations. There is also a strong demand for serviced and co-working space from established businesses that wish to lease short-term space
- 2024 has, so far, seen a considerable uptick in demand on 2023, by +7 percent as of Quarter 2. This growth has focused on Greater London, but prime markets elsewhere, including Leicester, have also seen benefits (Carter Jonas, 2024).
- While little new Grade A stock, is being developed, or becoming available, within the East Midlands, good quality second-hand stock remains popular, with growing confidence by landlords that refurbishments of older properties will be repaid by swift lettings.
- Despite increasing refurbishment activity there remains a significant amount of poor quality and dated stock, particularly within city centres. More and more, though, these buildings are being converted to other uses though, particularly into student accommodation.
- As noted, new build offices are desirable by occupiers, but development remains rare. To viably build new offices requires rents of in the region of £18-20/sqft (£194-215/sqm) to support the financial viability combined with a long-term lease commitment. Rents/leases at this level remain unachievable, even in cities like Derby and Leicester (Innes England, 2023).

The Leicester and Leicestershire Property Market

- 3.3 Officers of Leicestershire County Council and LLEP were contacted to discuss the property market across Leicester and Leicestershire, as it relates to Blaby District.
- 3.4 Stakeholders report that there is an east-west divide in Leicester and Leicestershire's property market. In the west, investment is dominated by logistics (road, rail and airport related) on the main transport corridors. Demand for units of 10,000 sqm or more has been extensive, with rental values reaching £8.75-9/sqft (£94-97/sqm) in mid-2022. This boom has delivered growth to Blaby District, supporting the fast take up of Optimus Point and the New Lubbethorpe Strategic Employment Site.

- 3.5 The macro-economic issues of the last two years, such as increasing inflation and high interest rates, have hit the B8 investment market hard, making securing development finance harder, while increased construction costs also inhibit the development of premises. Thus, while occupier demand remains strong, achieving viable development schemes to meet that demand can be challenging, particularly where developers bought land at the peak of the market and are struggling to recoup those purchase costs in 2024. It is expected that these issues will abate in 2024 though, with the logistics market returning to previous trends by 2025. In the short term though, these issues are holding up a lot of major investments.
- 3.6 Another growth area, with demand more evenly spread across Leicester and Leicestershire, is advanced manufacturing industries, including green sector businesses. Companies in such sectors typically want 2,000-3,000 sqm units, but smaller high tech units are also popular. High grade small high tech units have achieved high rents, ranging from £13/sqft (£140/sqm) up to £30/sqft (£323/sqm) for brand new Grade A, Net Zero buildings which makes them viable to develop even in a constrained market.
- 3.7 Related to this, the national Department of Trade and Industry is giving priority to inward investment requirements in the sciences. Such uses are pushed towards the UK's science parks. This gives some benefit to Pioneer Park in Leicester, Loughborough Science Park and MIRA in Hinckley and Bosworth. While Blaby District is home to some advanced manufacturing employers, in locations including The Whittle Estate, Whetstone, it doesn't have any purpose built science facilities to compete with these locations.
- 3.8 In terms of the more general industrial demand, there is strong interest, across the city and county, for freehold industrial units of around 2,000 sqm each but little availability. Also, buyers generally want to buy both the unit and the plot, which is not always possible.
- 3.9 Weaker industrial sectors include textiles, focused on Leicester, which suffers from a lack of cheap labour and gained a reputation for poor working practices during the Covid period. The sector needs to move up the value chain and increase its reputation for quality to remain competitive.

3.10 In terms of offices, Blaby District generally forms part of the common market area with Leicester and has historically been successful in attracting major employers to schemes like Grove Park. Today, however, both Blaby District and the city locations lack the Grade A space to compete with cities such as Nottingham for such uses. The best Grade A would need to achieve £30/sqft (£323/sqm) to be viable. Rents in Leicester peak at £22-26/sqft (£237-280/sqm) and it is not clear how much higher they can be pushed.

Skills and Innovation in Leicester and Leicestershire

3.11 90-95 percent of Leicester and Leicestershire's businesses are micro or small firms, employing one to nine staff. While often very innovative, such businesses can struggle to promote that innovation and attract investment. As a result, the LLEP area has one of the lowest innovation rates in Britain.

3.12 Leicester and Leicestershire's businesses are held back by a lack of skills in key areas. There is a shortage of skilled workers in STEM subjects. The LLEP area will need some 15,000 extra STEM workers by 2030. Some related issues include that:

- By 2030, it is forecast that 42 percent of jobs within Leicester and Leicestershire will require Level 4+, or University level qualifications
- Of the 16,900 additional jobs forecast to be created in Leicester and Leicestershire by 2030, 9,100 are expected to require Level 4 skills as a minimum entry standard on average
- In contrast, a further 4,900 additional jobs are expected to only require Level 2 skills as a minimum entry standard on average. This reflects the significant forecast growth in activities relating health and care, tourism and hospitality, and business services, where such lower level qualification standards are prevalent
- Leicestershire's technology and knowledge sectors are expected to see a decline in their workforce, largely a result of automation, digitisation and outsourcing, which could be accelerated post the Covid-19 Pandemic. This has the potential to boost productivity growth though, driving robust GVA growth.

3.13 As of 2022 Blaby District had a total of 57,700 individuals in employment, according to BRES data. Over 2015-2022, Blaby District saw jobs growth well above wider averages, albeit with some fluctuations. As of 2023, there was 4,075 VAT registered businesses operating in Blaby District, and these were mostly micro in size.

Blaby District Council

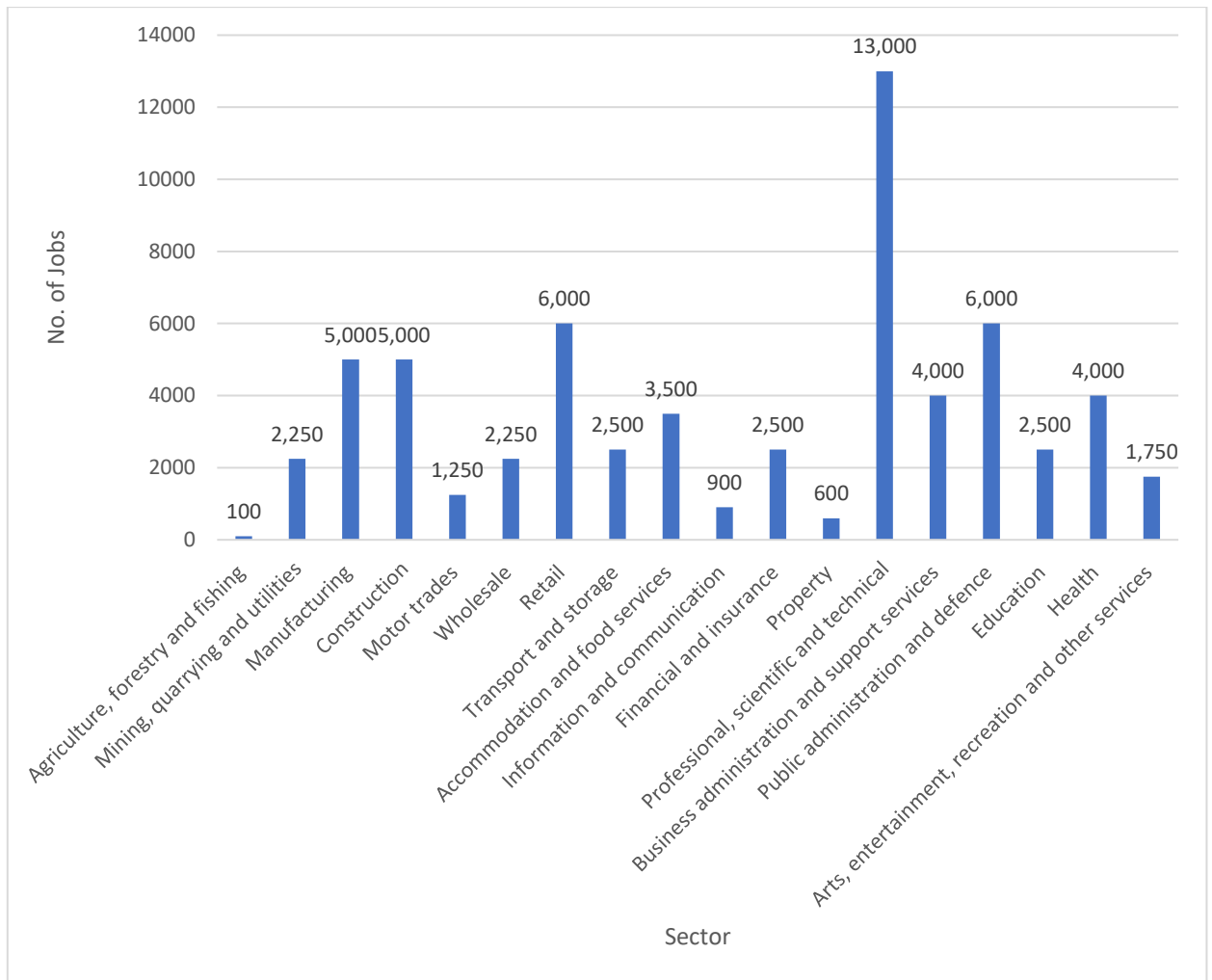
- 3.14 Blaby District Council Business Growth Officers were consulted for this Study on the local property market. They report receiving a modest six to seven enquiries annually from inward investors into the district. These can be from a diverse range of businesses ranging from micro-breweries to dentists. It can be difficult to find appropriate property for such diverse organisations in Blaby District.
- 3.15 Overall, Blaby District has a good supply of larger industrial and warehouse properties, in schemes such as Optimus Point, but lacks grow on space in the 150-500 sqm range to allow local business expansion. Another issue is the cost of premises. Rents in Blaby District are the highest, on a per sqft basis, in the county, reflecting the district's strong position on the M1 and M69 Corridors (local rents are discussed further below).
- 3.16 Finally, there is good freehold demand in the industrial and warehouse sectors. Established businesses will frequently look to invest in a second unit to allow for growth although this can generate extra costs through Business Rates, which will inhibit some investment.
- 3.17 For local businesses, Enderby and Countesthorpe tend to be the most popular locations, reflecting their strong positions on the strategic road network. However, Blaby District also benefits from a large offer of rural industrial estates, business parks and serviced schemes, extending west to Croft (many identified in the Fosse Villages Neighbourhood Plan: Update (2018-2019), which meet most rural needs. Larger businesses tend to go to Meridian Business Park or Grove Park, where the property offer is best aligned to their needs.
- 3.18 In terms of offices, Grove Park and Carlton Park have historically been the most successful business parks in the county, frequently out competing Leicester City Centre for inward investment. However, these parks are also too expensive for local firms, who tend to go to smaller, multi-occupancy schemes in rural areas.

Jobs and Business Change

- 3.19 This section looks at changes in local employment and business numbers as one measure of the market, and how demand for industrial, warehouse and office premises may be changing. It summarises the full analysis which is provided at Appendix 2.

3.20 As of 2022, Blaby District had 63,100 in employment. As Figure 2 shows, Blaby District has a clear strength in Professional, scientific and technical work, which is office based. In 2022 at least, it accounted for 20.3 percent of employment, against wider averages of 6.7-9.0 percent. Overall, 21,000 staff or nearly a third of the workforce were employed in private office sectors locally. Across Leicester and Leicestershire, only around a quarter of people were employed equivalent sectors, illustrating the importance of private offices to Blaby District.

Figure 2 – Economic Activity 2022



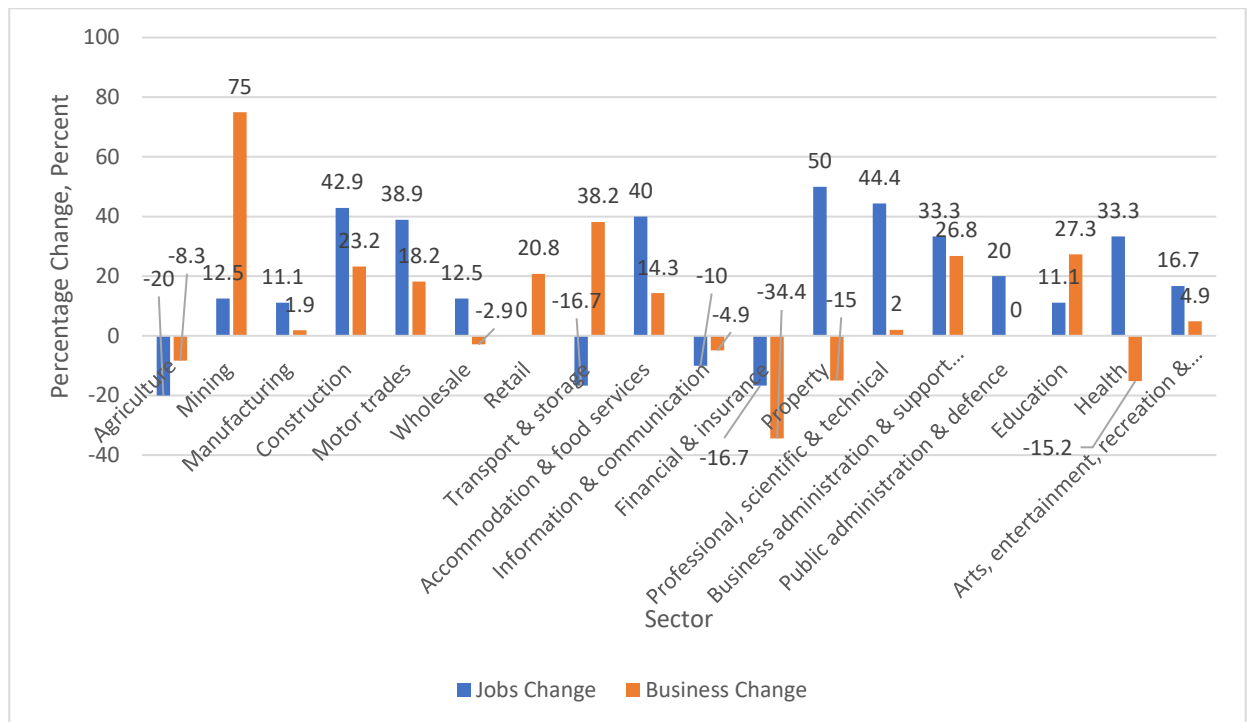
Source: BRES, 2022

3.21 Construction, which will require a mixture of offices and B8 storage, appears to be a local strength, accounting for 7.8 percent of local employment, compared to wider averages of around 5 percent.

- 3.22 Perhaps surprisingly given Blaby District's position on the M1 Corridor and range of associated B2/B8 schemes here, Transport and storage only accounted for 3.9 percent of local employment nearly half the Leicester and Leicestershire average. Employment in ICT, Health and Education was also well below wider averages. In the case of Health, this will partially reflect the fact that Glenfield Hospital falls outside of the district boundary.
- 3.23 Manufacturing had a modest role locally, employing 5,000 in 2022, or 7.8 percent of local employment. This was proportionally in line with the national average but well below county or regional averages of just over 11 percent. Thus the focus of local, private sector, employment is towards office uses.
- 3.24 As of 2023, there were 4,075 VAT registered businesses operating in Blaby District. 88.5 percent of the district's businesses employed less than ten people (micro businesses), and 9.2 percent of businesses were classified as small (10-49 employees). This suggests that most local firms will require smaller accommodation, something discussed further in the transaction and stakeholder engagement sections below.
- 3.25 The split of existing local businesses, by business sector, is set out in Appendix 2 but generally reflects the employment patterns with the largest numbers of businesses being in Construction (795), Professional, scientific and technical (500) and private offices more generally (1,470 or 36.1 percent of the total). Transport and storage has similar numbers of businesses, 240-250 respectively.
- 3.26 Figure 3 shows the proportionate change in employment (blue) and business numbers (orange) over 2015-2022 to illustrate were the recent economic growth, and thus property demand, has occurred in Blaby District over the last decade.
- 3.27 In terms of economic change in key sectors, the following trend can be noted:
- Over 2015-2022, the Professional, scientific and technical sector had the largest gains by jobs numbers, gaining 4,000 extra jobs or a 44.4 percent uplift on 2015. However, only 10 extra businesses were recorded over the same period. This suggests that the office employment increases occurred within the existing businesses of Blaby District rather than reflecting new businesses starting up here or coming into the district. Thus the number of additional office property requirements generated by this growth may prove modest, although expanding firms will have some premises needs

- The property sector saw a similarly large proportionate increase in in jobs numbers, 260 extra jobs or a 50.0 percent uplift, but saw a reduction in business numbers. Again this is not likely to generate high numbers of premises requirements
- By comparison, the Financial and insurance sector lost both jobs and businesses, over this period, suggesting that this is a sector in local decline. As will be discussed in Section 6.0, forecasting suggests that Blaby District will continue to lose financial services labour over the Local Plan period.
- Construction saw steady growth, adding 1500 jobs and 145 companies, which shows the strength of this sector in Blaby District and likely generates demand for further premises options in terms of offices and storage
- The Manufacturing sector gained 500 jobs over 2015-2022, but only five companies. Thus, barring some very significant inward investment, it is assumed that the jobs growth was mostly in existing firms
- The Transport and storage sector saw a good increase in business numbers, an extra 65 or a gain of over a third which will generate premises requirements. This is surprising since the sector lost jobs since 2015. The employment reductions may be a result of an increase in efficiency of logistics activities and increasing automation within the sector.

Figure 3 – Jobs and Business Percentage Change, 2015-2022



Source: ONS UK Business Counts and BRES, 2024

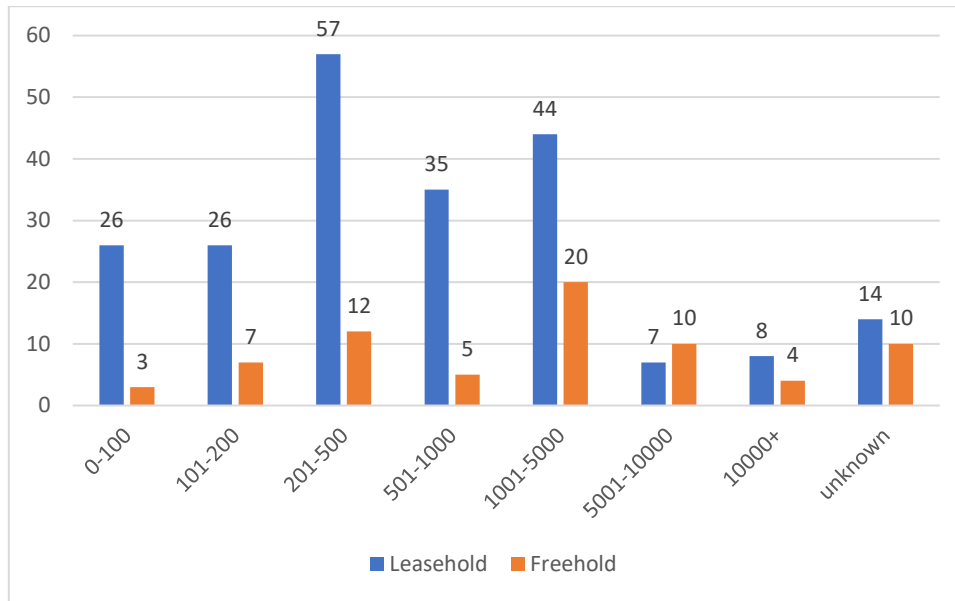
Property Transactions

3.28 Transactional information has been sourced from Radius Data Exchange property database for industrial units and offices, which have been sold or let in Blaby District in the last ten years. Transactional data provides evidence of trends, popular locations, along with prime rents which have been achieved in the area.

Industrial/ Warehouse

3.29 288 industrial deals have been completed within Blaby District in the past decade, comprising 580,178 sqm of floorspace. Figure 4 provides a breakdown of these deals by size band.

Figure 4 – Blaby District Transactions 2014-2024, by Size Band, Sqm

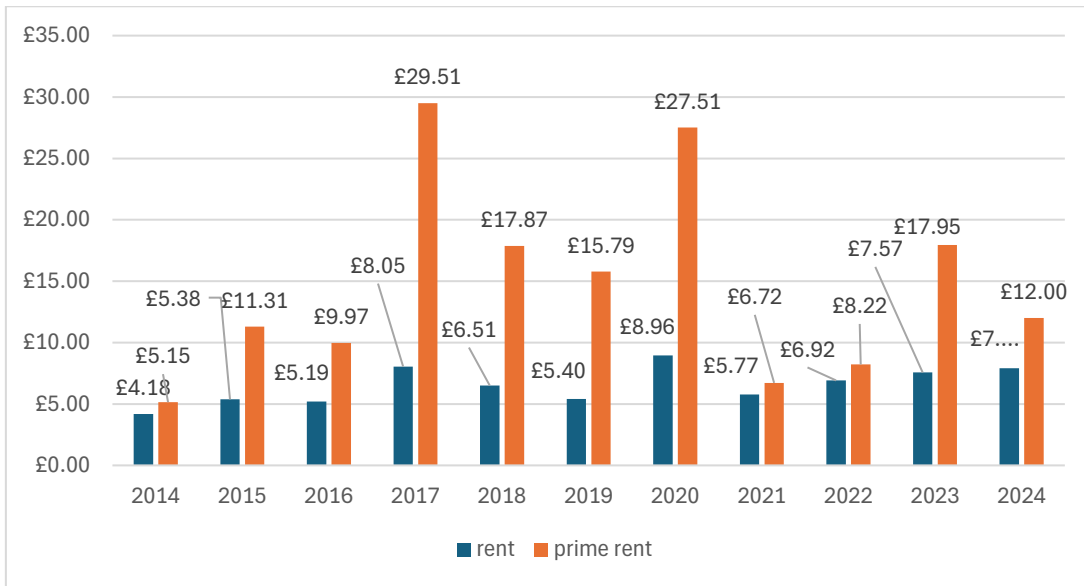


Source: EGi Radius, 2024

- 3.30 Most deals were for units of less than 5,000 sqm each and particularly units of 201-500 sqm and 1,001-5,000 sqm. This demand pattern has been relatively consistent over the last decade.
- 3.31 2018 and 2019 saw the highest number transactions occur within a single year at 49 in each year, 34.02 percent of the decade total. Since then, market activity has decreased to an average of 10 deals/year, likely a result of the Covid-19 Pandemic of 2020-2021 and the macro-economic issues which have occurred since then. The largest amount of floorspace transacted during a single deal was the letting of the 25,778 sqm Unit 277, Optimus Point, Ratby Lane in 2018. Seven other deals of comparable scale were recorded at Optimus Point, over this period, most in 2016-2019. All were lettings, for 10-20 year periods, and achieved rents of around £6/sqft (£65/sqm) for a 10 year letting and £5/sqft (£54/sqm) for a 20 year letting.
- 3.32 Of the 288 deals, three quarters were leasehold, and the other quarter were freehold sales.
- 3.33 Of the freehold sales the largest investment deal recorded was for 44,761 sqm of floorspace, two units of 25, 000 sqm of each, at Optimus Point, purchased by M and G Real Estate in 2018.

3.34 Figure 5 shows the average rents being achieved for industrial units over the last decade, as well as the prime (highest) rents achieved for each year. Average rents fluctuated somewhat but reached a decade peak of £8.96/sqft (£96/sqm) in 2020, before reducing noticeably in 2021, the Pandemic year. Since then, average rents do seem to have gradually recovered and now stand at £7.90/sqft (£85/sqm). Excluding 2017 and 2020, when the Prime Rents came from exceptionally small units being let, the best industrial rents achieved, over the decade, do not generally exceed £18/sqft (£194/sqm).

Figure 5 – Blaby District Achieved Industrial Rents 2014-2024, £/sqft

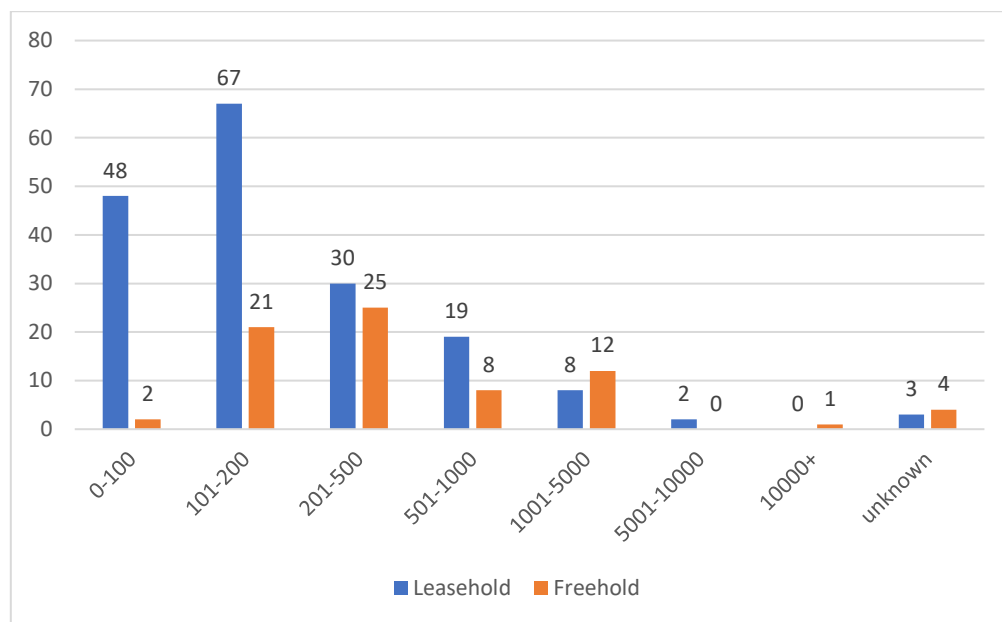


Source: EGi Radius, 2024

Office

3.35 Since the start of 2014, 250 office deals have been completed within Blaby, comprising 137,918 sqm of floorspace. Figure 6 below shows a breakdown, by size band, leasehold and freehold of the recorded transactions.

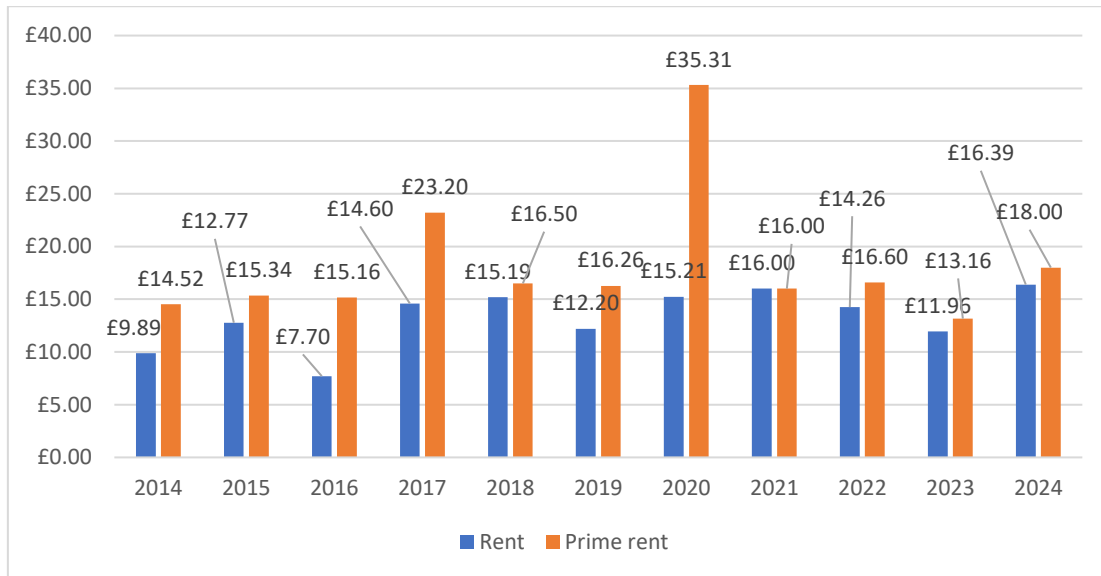
Figure 6 – Blaby District Office Transactions, 2014-2024, by Size Band, Sqm



Source: EGi Radius, 2024

- 3.36 Most deals were for sub 5000 sqm units, with around half of the transactions being within the 0-500 sqm size bands and suites of 101-200 sqm most commonly transacted. 2015 saw the highest number of deals occur within a single year, 38, 15.2 percent of the decade total. 2014 was the second highest number of deals, 34, or 13.6 percent. Since 2021 and the end of the Lockdowns associated with the Covid-19 Pandemic, the annual transaction rate has been far lower at 6-10 deals/year.
- 3.37 The largest deal of the decade was the investment sale of the 34,000 sqm Next Headquarters to British Gas. The largest occupational letting was of the 7,990 sqm 3 Penman Way, Grove Park, Enderby, to Synter Group for 22 years. 177 (70.8 percent) of the deals were lettings, the rest freehold sales.
- 3.38 Figure 7 shows the average and prime rents being achieved within the office sector for Blaby District over the past decade. As with the industrial sector, average rents fluctuated but reached a peak in 2021 of £16.00/sqft (£172/sqm). Average rents reduced noticeably in 2022 and 2023, but do seem to have recovered in 2024, with an average of £16.39/sqft (£176/sqm) the peak of the decade. In terms of prime rents, again excluding obvious outliers in 2017 and 2020, these rarely peaked above £16.50/sqft (£179/sqm) until 2024 when £18/sqft (£194/sqm) was achieved for the 1,947 sqm Fosse House, Grove Park, 6 Smith Way, Grove Park. Thus interestingly, Blaby District has so far seen some of its best office market performance this year.

Figure 7 – Blaby District Achieved Office Rents 2014-2024, £/sqft



Source: EGi Radius, 2024

Property Supply

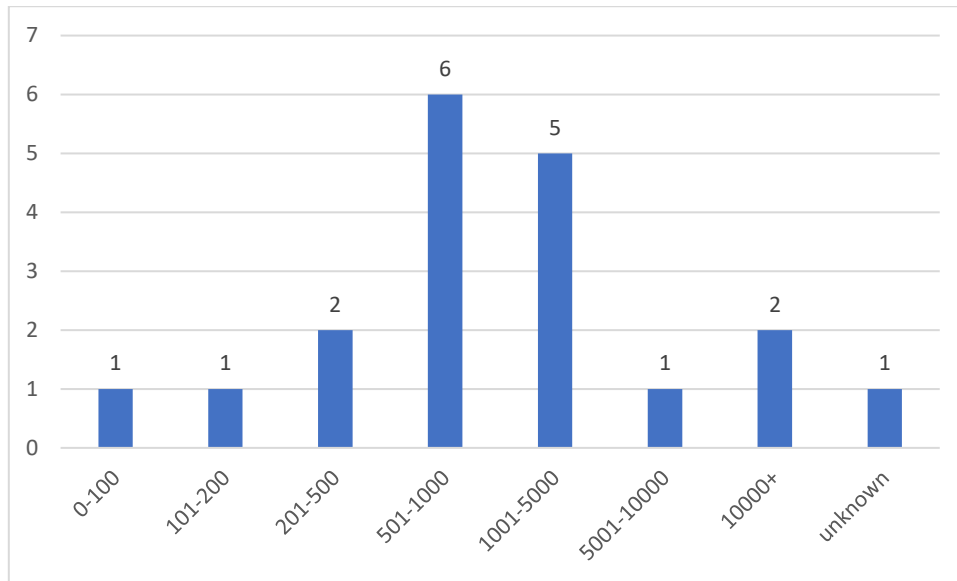
3.39 A schedule of the vacant floorspace being marketed within Blaby District, (as of November 2024) has been compiled mainly from physical survey, a trawl of commercial property agents websites and consultations with agents. The marketed space is taken to be a reasonably close approximation to that which is vacant - although there may be occupiers waiting for interest in their property before moving, and empty units not actually being marketed.

Industrial/Warehouse

3.40 22 industrial premises were on the market in Blaby District in November 2024, comprising 73,828 sqm of floorspace. However, of this 51,557 sqm or 69.8 percent comprises just two large B8 units available at Optimus Point – Unit C2 and Optimus 277 – both of around 26,000 sqm each. All the marketed units are available to let, only.

3.41 As Figure 8 shows, the current offer of marketed premises is focused in the 501-5,000 sqm range, which have seen plenty of past transactions. However, availability in smaller size ranges, which might support micro and small businesses, are limited.

Figure 8 – Blaby District Marketed Industrial Units, by Size Band, Sqm



Source: EGi Radius, 2024

3.42 Past transaction rates suggest the district sees 29 industrial deals/year, comprising 58,000 sqm/year of floorspace. Against that rate of take up, the marketed properties, as of November 2024 equate to less than a year’s supply by premises. By floorspace, the marketed premises equates to 1.2 years supply although, as noted, most of that floorspace is in just two units.

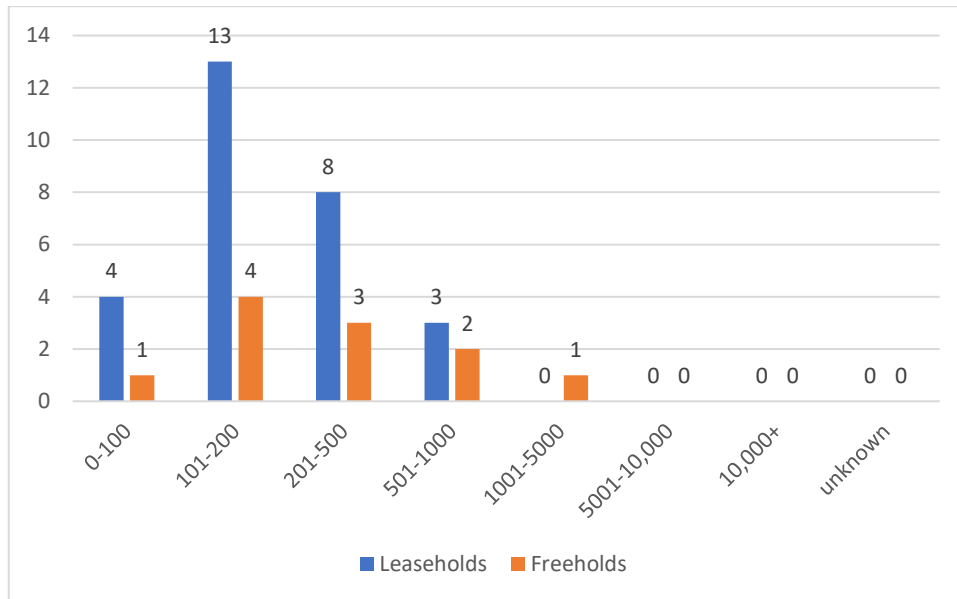
Offices

3.43 There were 39 office premises being marketed within Blaby District, in November 2024, totalling to 11,195 sqm. As Figure 9 shows, most of the available offices were in the 0-500 sqm size range, particularly of 100-200 sqm, which reflects past transaction patterns.

3.44 Unlike the industrial supply there were 11 freehold premises available, found across the size bands.

3.45 Past transaction rates suggest the district sees 25 office deals/year, comprising 13,800 sqm/year of floorspace. Against that rate of take up, the marketed properties, as of November 2024 equate to 1.6 years’ supply by premises. By floorspace, the marketed premises equates to 1.2 years supply.

Figure 9 – Blaby District Marketed Office Units, by Size Band



Source: EGi Radius, 2024

Valuation Office Data

- 3.46 The Valuation Office Agency (VOA) provides data on the overall number of business premises (hereditaments) and overall floorspace by broad use type, including offices and industrial/warehousing. According to the latest VOA statistics (2023), there were 740 industrial hereditaments and 620 office hereditaments within Blaby District at that time, totalling 854,000 sqm and 187,000 sqm respectively.
- 3.47 Comparing these VOA figures to the vacancy schedules above can provide an indication of the overall occupancy rate of the commercial premises. The occupancy rates calculated are estimates only due to the different timeframes of the two sets of data (VOA data and the vacancy schedules) and that some floorspace may be being sold off-plan (not yet built). However, they do provide a reasonable indication of the overall performance of the market.
- 3.48 In Blaby District, as of November 2024, there were some 73,828 sqm of industrial space and 11,195 sqm of office space on the market, which equates to occupancy rates of 91.4 percent for industrial and 94.0 percent for office space. By premises the figures are 97.0 percent for industrial and 93.7 percent for offices.

- 3.49 Occupancy rates of 90-95 percent can be considered a reasonable balance between a vibrant, active market, providing good returns to landlords and providing capacity for churn and growth in the market. A higher occupancy rate is an indicator of a full market with businesses having difficulties in finding adequate premises. A lower occupancy rate indicates long-term unoccupied and derelict stock and poor business growth.
- 3.50 By this measure, Blaby District has some shortage of available industrial premises, when considered by premises numbers, but otherwise has reasonable occupancy rates.

Property Market Stakeholders

- 3.51 This section provides qualitative evidence of the demand, activity levels in relation to spatial and size differences, key market interests and weaknesses in the market for industrial and office property within the study area. This data was gained through consultations with active commercial property agents and developers in Blaby District. A full list of consultees is provided at Appendix 1. These views are the opinions of the representatives of the consulted organisations at the time of the consultations, and they are not the views of Blaby District Council, or BE Group (the Consultants).

Industrial/Warehouse

- 3.52 Stakeholders report good local demand for leasehold premises of 300-700 sqm and freehold premises of up to 1,000 sqm to allow local business growth in a range of sectors. Such demand is found across the district but is focused on the main transport routes. As most of Blaby District's rural areas have reasonable main road access, demand extends much further into the countryside than might be true elsewhere.
- 3.53 Demand for larger industrial and warehouse premises is focused on the M1 Corridor specifically and on Meridian Business Park more generally. In the north and west of Meridian there is a healthy market for larger units of 15,000-30,000 sqm both from existing large employers and investors who may be looking across the Leicester Conurbation. Given constrained supply in Leicester City, the main competition for Meridian is schemes in the south of Charnwood. Industrial estates in Charnwood still retain growth capacity while schemes in Blaby District are largely full. In this regard developing the Land West of St Johns, Enderby will be key to allow Blaby District to remain competitive in terms of allowing ongoing business growth and investment.

3.54 The quality of the local stock, in Blaby District, is generally good and there are no employment areas where low grade stock is a particular issue. As mentioned, rural stock is relatively accessible, including via bus routes, and the more rural settlements in the west of the district, including Stoney Stanton, Sharnford and Croft, as well as Cosby in the east, have at least one industrial estate (many identified in the Fosse Villages Neighbourhood Plan: Update (2018-2019)). These serve broad rural catchments and meet a lot of needs. Their availability means there tends to be less pressure for farm conversions, which tend to only meet requirements for affordable storage space which is not available in the larger industrial estates.

3.55 However, there are still unmet requirements across the district and a need for a pipeline of development, particularly in rural areas where less development has happened recently.

3.56 Average rents, for new industrial are:

- Smaller units, 400-800 sqm – £8.24-8.50/sqft (£89-91/sqm) extending up to £10/sqft (£108/sqm)
- For a larger unit, 1,400 sqm at the prime location of Meridian – £9.35/sqft (£101/sqm)
- A more general larger units of 1,000-2,000 sqm – £7.75/sqft (£83/sqm)

3.57 Rents for second hand space are around £5.00/sqft (£54/sqm).

Office

3.58 The office market has improved significantly since the end of the Covid-19 Pandemic and associated Lockdowns. Business have generally adapted to hybrid working practices and have a clear idea about the quantum of space they need, releasing surplus space but also seeking out higher grade alternatives. Sustainability policies are also pushing businesses towards modern stock with higher EPC Ratings, against older options.

- 3.59 Blaby District has a good offer of modern premises, in very accessible locations around Enderby and Braunstone Town. There has been little recent growth in the offer in Blaby District which might attract new businesses and allow existing businesses to grow. The prospects of significant new development remain modest, and it is more likely business needs will be met through the refurbishment and remodelling of stock. As businesses practicing hybrid working generally require smaller suites, there are now opportunities to increase the density of office units. Local firms generally require suites of up to 500 sqm while larger businesses will frequently invest in a more substantial, freehold/long leasehold property of up to 2,000 sqm.
- 3.60 Best rents for existing premises are seen at Grove Park at £14.50-18.00/sqft (£156-194/sqm) while £15/sqft (£161/sqm) will be a more normal average for good quality space elsewhere. Lower grade space may only achieve £7/sqft (£75/sqm) in this more limited market. A peak rent of £18.00/sqft (£194/sqm) would not be high enough to make new build development viable. However, some stakeholders indicated that new build Grade A space, delivered at locations such as Grove Park might achieve £27.50-£30.00/sqft (£269-323/sqm), a rate at which development may become deliverable and comparable to the best rates which might be achieved in Leicester City Centre. Experience in the City Centre, however, suggests that chances of new development remain modest, at least without public sector support or investment from a major new employer coming into the area, or expanding locally. It is more likely business needs will be met through the refurbishment and remodelling of stock. As businesses practicing hybrid working generally require smaller suites, there are now opportunities to increase the density of office units.
- 3.61 Healthy demand is reported in rural parts of Blaby District, something also true in the other Leicestershire authorities, with markets extending across boundaries. Blaby District is reasonably well served by rural schemes, including Narborough Wood Park, Desford Road, Enderby and a quite comprehensive offer in Croft (many identified in the Fosse Villages Neighbourhood Plan: Update (2018-2019)). These offer high grade accommodation but are usually near to capacity so there is always demand for more stock. As mentioned, given the rental level's businesses are able to pay, such demand is likely to be met through refurbishment of existing stock rather than new development which might generate an employment land requirement.

Summary

- 3.62 Regionally, the market for larger industrial and warehouse stock remains strong and there is a lack of modern, high grade buildings to meet needs. Conversely there is an oversupply of older, second hand units. Supply shortages are encouraging business to refurbish or expand their existing units.
- 3.63 Hybrid working practices are encouraging businesses to review their office property holdings. Where companies are seeking space in 2024, there is a much greater focus on buildings that are sustainable and energy-efficient.
- 3.64 There is also a strong demand for serviced and co-working space from established businesses that wish to lease short-term space. While little new Grade A stock, is being developed, or becoming available, within the East Midlands, this need is being met in good quality second-hand stock, increasing the confidence of landlords that refurbishments of older properties will be repaid by swift lettings. Conversely, low grade offices are increasingly surplus to requirements and being converted to other uses.
- 3.65 In Leicester and Leicestershire, the investment market in the west of the city and county has been dominated by the logistics sector. Demand is for units of 10,000 sqm or more has been extensive, with rental values reaching £8.75-9/sqft (£94-97/sqm) in mid-2022. This boom has delivered growth to Blaby District, supporting the fast take up of Optimus Point and the New Lubbethorpe Strategic Employment Site, although their remain shortages for local firms, particularly for grow on space and freehold options.
- 3.66 Another growth area, with demand more evenly spread across Leicester and Leicestershire, is advanced manufacturing industries, including green sector businesses. Companies in such sectors typically want 2,000-3,000 sqm units, but smaller high tech properties are also popular and achieving high rents. Related to this is growth in the science sectors, although demand here is focused on Leicester and Leicestershire's Science Parks, which fall outside of Blaby District.
- 3.67 In terms of the more general industrial demand, there is strong interest, across the city and county, for freehold industrial units of around 2,000 sqm each, but little availability.

3.68 In terms of offices, Blaby District generally forms part of the common market area with Leicester and has historically been successful at attracting major employers to schemes like Grove Park. Today, however, both Blaby District and the city locations lack the Grade A space to compete with cities such as Nottingham for such uses, while viability is a barrier to further development.

Socio-Economic Change/Market Transactions/Supply

3.69 Manufacturing had a modest role locally, employing 5,000 in 2022, or 7.8 percent of local employment. Manufacturing jobs numbers have grown over the last decade but the increase in the number of businesses has been limited, suggesting the growth reflected the expansion of existing firms rather than incomers to the district, so is not likely to generate large numbers of additional property requirements (although some local firms may need larger property options, if they are expanding).

3.70 By comparison Construction and Transport and storage did see growth in both business numbers and, in the case of Construction, jobs. This growth will generate premises needs, particularly for B8 options, in a range of sizes.

3.71 Market transactions for the last decade, in Blaby District, have been reviewed. In terms of the industrial market most of the market activity was for sub-5,000 sqm units, and particularly units of 201-500 sqm and 1,001-5,000 sqm. Three quarters of the recorded deals were leasehold. Average rents fluctuated somewhat but reached a decade peak of £8.96/sqft (£96/sqm) in 2020, before reducing in 2021. Rents now stand at £7.90/sqft (£85/sqm). The high average rents also suggest that Blaby District does not have a significant problem with lower grade industrial stock.

3.72 In 2022, 21,000 staff or nearly a third of the workforce were employed in private office sectors locally, particularly professional services. Key office sectors are growing in terms of jobs, but again the gain in business numbers is limited suggesting premises requirements will be modest. The exception is the Financial and insurance sector lost both jobs and businesses, over 2015-2022, suggesting that this is a sector in local decline. As will be discussed in Section 6.0, forecasting suggests that Blaby District will continue to lose financial services labour over the Local Plan period.

- 3.73 In terms of office transactions, half of the recorded deals for the decade were within the 0-500 sqm size bands and suites of 101-200 sqm most transacted. Larger deals were rarer but occupational transactions for up to 8,000 sqm of office space have occurred. Average rents reduced noticeably in 2022 and 2023, but do seem to have recovered in 2024, with an average of £16.39/sqft (£176/sqm) recorded, the peak of the decade. 2024 also saw the highest prime rent for the decade, £18/sqft (£194/sqm). Thus interestingly, Blaby District has so far seen some of its best office market performance this year.
- 3.74 In November 2024, a total of 73,828 sqm of industrial floorspace was being marketed comprised of 22 individual premises, although much of this floorspace comprised two very large units on the market at Optimus Point. Past transaction rates suggest the district sees 29 industrial deals/year, comprising 58,000 sqm/year of floorspace. Against that rate of take up, the marketed properties, as of November 2024 equate to less than a year's supply by premises. By floorspace, the marketed premises equates to 1.2 years supply although, as noted, most of that floorspace is in just two units. The current offer of marketed premises is focused in the 501-5,000 sqm range, which have seen plenty of past transactions. However, availability in smaller size ranges, which might support micro and small businesses, are limited.
- 3.75 There were 39 office premises being marketed within Blaby District totalling 11,195 sqm, in November 2024. Past transaction rates suggest the district sees 25 office deals/year, comprising 13,800 sqm/year of floorspace. Against that rate of take up, the marketed properties, as of November 2024 equate to 1.6 years' supply by premises. By floorspace, the marketed premises equates to 1.2 years supply. Most of the available offices were in the 0-500 sqm size range, particularly of 100-200 sqm, which reflects past transaction patterns.
- 3.76 The occupancy rates for Blaby District suggest that it has some shortage of available industrial premises, when considered by premises numbers, but otherwise has reasonable occupancy rates.

Property Market Stakeholders

- 3.77 Stakeholders report good local demand for leasehold premises of 300-700 sqm and freehold premises of up to 1,000 sqm to allow local business growth. Such demand is found across the district but is focused on the main transport routes.

- 3.78 Demand for larger industrial and warehouse premises is focused on the M1 Corridor specifically and on Meridian Business Park more generally. In the north and west of Meridian there is a healthy market for larger units of 15,000-30,000 sqm both from existing large employers and investors who may be looking across the Leicester Conurbation.
- 3.79 The quality of the local stock, in Blaby District, is generally good and there are no employment areas where low grade stock is a particular issue. Rural stock is relatively accessible, including via bus routes, and the more rural settlements of the district have at least one industrial estate. Their availability means there tends to be less pressure for farm conversions, which will normally only mean low grade requirements for storage space. However, there are still unmet requirements across the district and a need for a pipeline of development.
- 3.80 The local office market has improved significantly since the end of the Covid-19 Pandemic and associated Lockdowns. Businesses have a clear idea about the quantum of space they need, releasing surplus space but also seeking out higher grade alternatives.
- 3.81 Blaby District has a good offer of modern premises, in very accessible locations around Enderby and Braunstone Town. There has been little recent growth in the offer in Blaby District which might attract new businesses and allow existing businesses to grow. The prospects of significant new development remain modest, and it is more likely business needs will be met through the refurbishment and remodelling of stock. As businesses practicing hybrid working generally require smaller suites, there are now opportunities to increase the density of office units. Local firms generally require suites of up to 500 sqm while larger businesses will frequently invest in a more substantial, freehold/long leasehold property of up to 2,000 sqm.
- 3.82 Healthy demand is reported in rural parts of Blaby District, something also true in the other Leicestershire authorities, with markets extending across boundaries. Blaby District is reasonably well served by rural schemes which offer high grade accommodation but are usually near to capacity so there is always demand for more stock.

4.0 FUNCTIONAL ECONOMIC MARKET AREA

Introduction

- 4.1 This section defines and reviews Blaby's role in the wider economy of Leicester and Leicestershire and the East Midlands (and West Midlands where there is an overlap). It provides a definition and quantitative review of the Blaby District Functional Economic Market Area (FEMA).
- 4.2 It should be noted that this FEMA exercise is bespoke to this study and identifies a FEMA for Blaby District only, as part of the unique evidence base of the Blaby Local Plan. It is distinct from the same exercise completed in the HENA (2017) and discussed in subsequent HENA Studies. The HENA (2017) considered a FEMA for the whole of Leicester and Leicestershire and thus operated at a much larger scale, with differing data sources. It could be expected to reach differing conclusions.
- 4.3 The HENA studies ultimately identified a 'best-fit' housing market area based on local authority boundaries including Leicester and all the Leicestershire authorities. The HENAs however also recognise "that the economic geography can vary for different sectors of the economy, and that for the logistics and distribution sector in particular, the area forms part of a wider Midlands market area, with a particular concentration of activity and demand within the 'Golden Triangle' formed broadly by the M42, M1 and M6 motorways which sit at the heart of the country with strong accessibility to the major UK consumer markets and represents an optimum location for National Distribution Centres." This Section explores these relationships in more detail, for Blaby District only.

Guidance on FEMA Definition

- 4.4 Paragraph 19 of the Planning Practice Guidance Note "*Plan-making*" (2021) identifies that: "Since patterns of economic activity vary from place to place, there is no standard approach to defining a functional economic market area, however, it is possible to define them taking account of factors including:
- extent of any Local Enterprise Partnership within the area
 - travel to work areas
 - housing market area
 - flow of goods, services and information within the local economy

- service market for consumers
- administrative area
- catchment areas of facilities providing cultural and social well-being
- transport network.”

4.5 All definitions of the FEMA are approximations of the interrelationships of a local economy with areas outside the local authority. Analysis cannot account for all relationships in the economy, rather it is a representation of the key economic, workforce and consumer flows for the local economy.

Analysis

Local Enterprise Partnership

4.6 Blaby fell within the Leicester and Leicestershire LEP. This reflected Blaby District's established role within the county, but also very significant economic interrelationships as is shown in the commuting data below.

4.7 In 2023, the National Government announced that it would cease funding LEPs nationwide. Accordingly, as of 1st April 2024, LEP functions were transferred to Leicester City Council and Leicestershire County Council. The economic functions of the LEP still cover the whole city and county, however.

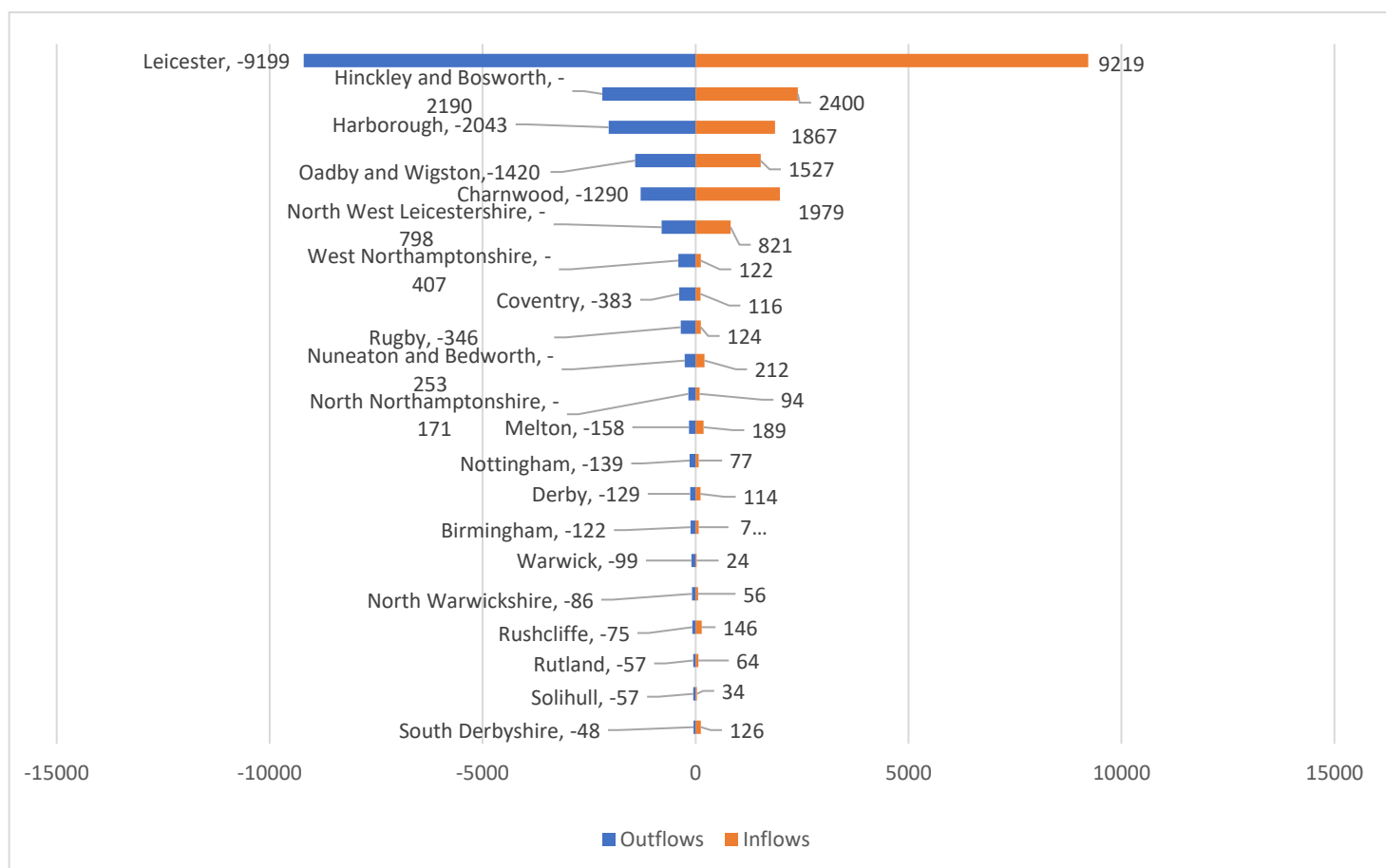
Travel to Work Area

4.8 The commuting patterns of the working residents of Blaby District and the workforce employed in the local authority area is important in understanding the housing and employment role of Blaby District in the context of the broader sub-region. This has implications for the definition and understanding of the Blaby District FEMA.

4.9 Figure 10 and Table 7 summarise the in and out commuting patterns of Blaby District at the time of the 2021 Census. The 2021 commuting data will be skewed by the Covid-19 Pandemic and related lockdowns, that were ongoing in 2021, and which encouraged far greater levels of homeworking than might have occurred naturally. Accordingly, the figures given below should be taken as indicative of wider patterns rather than definitive.

4.10 Overall, in 2021 at least, Blaby was a modest net exporter of labour, with a net loss of -129 workers.

Figure 10 – In and Out Flows of Blaby District Commuters



Source: ONS 2021 Census

Table 7 – In and Out Flows of Blaby District Commuters – Net Flow of Workers*

Settlement	Net Flow of Workers into Blaby District
Leicester	20
Hinckley and Bosworth	210
Harborough	-176
Oadby and Wigston	107
Charnwood	689
North West Leicestershire	23
West Northamptonshire	-285
Coventry	-267
Rugby	-222
Nuneaton and Bedworth	-41
North Northamptonshire	-77
Melton	31
Nottingham	-62
Derby	-15

Settlement	Net Flow of Workers into Blaby District
Birmingham	-45
Warwick	-75
North Warwickshire	-30
Rushcliffe	71
Rutland	7
Solihull	-23
South Derbyshire	78
Elsewhere in England and Wales	-47
Total	-129

Source: ONS 2021 Census

*Inflows less outflows

- 4.11 When considering the Blaby District's combined relationship to other local authority areas, by far the largest flows of workers were, unsurprisingly, with neighbouring Leicester. Around 9,200 workers commuted into the city to work in 2021, and a similar number commuted out to Blaby District. Sizable flows, both positive and negative were also recorded between Blaby District and neighbouring Hinckley and Bosworth and Harborough, as well as more distant Oadby and Wigston, Charnwood and North West Leicestershire. This shows the strength of economic interrelationships across west and central Leicestershire with nearly 35,000 workers commuting to and from Blaby District, to/from these local authority areas in 2021.
- 4.12 The only part of the county which did not appear to have particularly strong economic interrelationships with Blaby District, at least in terms of labour flows, was Melton. Only 347 commuter movements between Melton Borough and Blaby District were recorded in 2021. This likely reflects the practical distance between Blaby and Melton and the more modest transport linkages between the two Leicestershire local authority areas.
- 4.13 Outside of Leicester and Leicestershire, Blaby District's strongest relationship was perhaps surprisingly with West Northamptonshire. Blaby District was a net exporter of labour to West Northamptonshire in 2021, and 529 labour movements were recorded overall, between this location and Blaby District. This likely reflects economic linkages along the M1 and A5 Corridors, particularly to the major logistics facilities at Junction 18, M1, which fall into West Northamptonshire.

- 4.14 Linkages to Blaby District's more immediate neighbours in Warwickshire were more limited with, for example, only 470 commuter movements recorded to/from neighbouring Rugby, in 2021. Only 216 movements were recorded between Blaby and Nottingham, also suggesting limited economic linkages.
- 4.15 Overall, Blaby District had strong economic linkages – which can be defined as more than 500 commuter movements, in and out of the district, to or from that location – with its Leicester and Leicestershire neighbours of Leicester, Hinckley and Bosworth and Harborough as well as more distant Oadby and Wigston, Charnwood and North West Leicestershire. Links with Melton were more modest. Strong links can also be observed between West Northamptonshire (529 commuter movements in total).

Housing Market Area

- 4.16 Housing Market Assessments can be useful in defining FEMAs as they review population and travel to work/migration patterns to understand defined areas of economic activity, which inform housing market area geographies.
- 4.17 As noted, the HENA (2017) examined the extent of the Housing and Functional Economic Market Areas, of the city and county in detail, concluding a 'best-fit' housing market area based on local authority boundaries included Leicester and all the Leicestershire authorities. This reflected a high degree of commuting self-containment within the Leicester and Leicestershire LEP area, the coordination of wider administrative functions at the LEP/county level, the retail hierarchy and role of Leicester City Centre and Fosse Park as higher order centres which attract shoppers from across Leicestershire, as well as the concentration of leisure/cultural facilities in Leicester (and to a lesser extent Loughborough).
- 4.18 The updated Leicester and Leicestershire HENA (2022) also found that the main towns of Leicestershire all fall within the boundaries of a Leicester-focused Travel to Work Area. This reinforced the findings of the 2017 HENA, which identified a Leicestershire FEMA comprising a central city (Leicester) and wider hinterland; with market towns including Coalville, Loughborough, Melton Mowbray, Hinckley and Market Harborough sitting within this.

- 4.19 However, both Studies also identified the role of Leicester and Leicestershire’s logistics sector in the wider Golden Triangle which extends along the M1 from Milton Keynes to Nottingham/Derby and across to Birmingham. “The prime location within this area – the core Golden Triangle – stretches from Leicester to Rugby and Coventry. This geography reflects the area’s central location within England and strategic road and rail connectivity (with most major population centres within a 4.5 hour drivetime).”

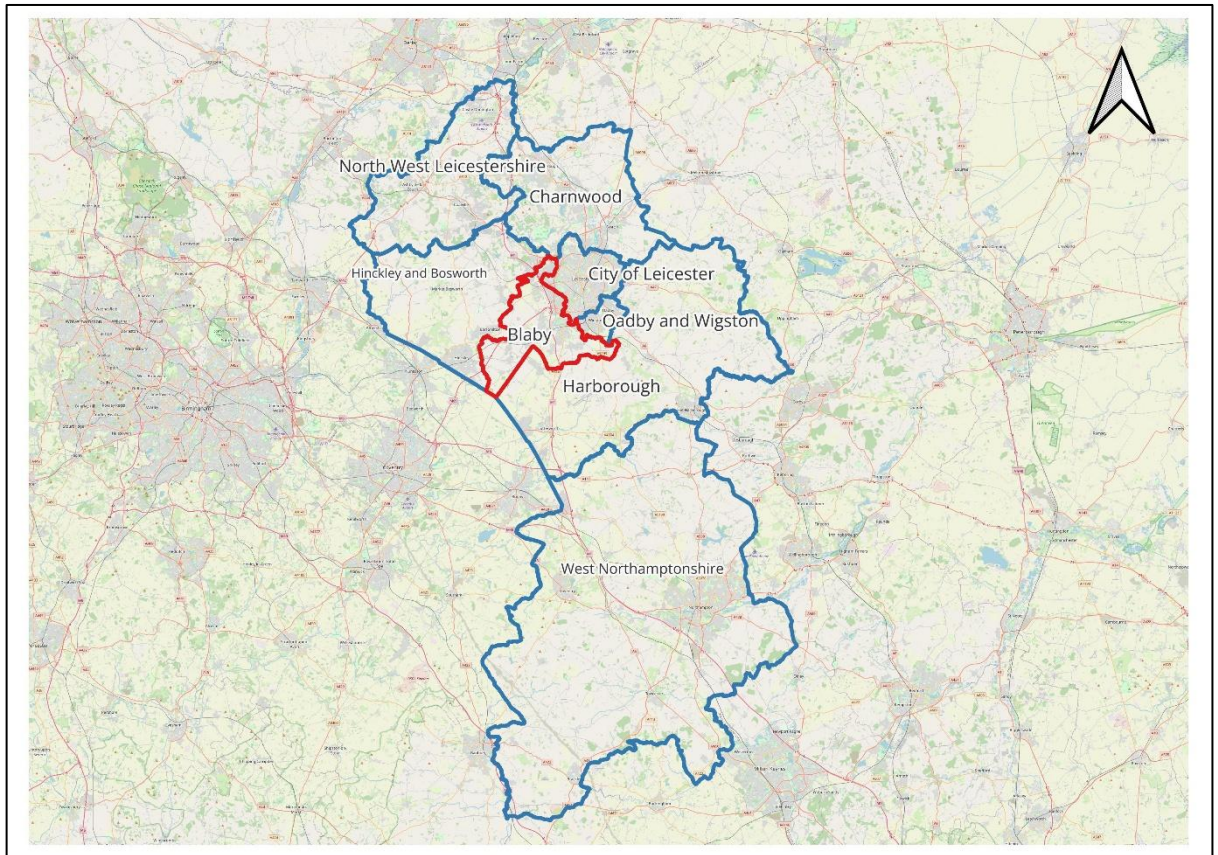
Services and Infrastructure

- 4.20 Key cross country road links include the M1 and M69, which links to the M6. These two motorways meet at Junction 21, M1, in Blaby District, which also links to the A563 Leicester Ring Road and the A5460 Narborough Road into Leicester. The A47 runs from Hinckley/M69 across the north of Blaby District into Leicester. The A426 runs south from Leicester, through Blaby town/Whetstone and then Lutterworth, before continuing south to Rugby and beyond. The A5199 also passes south, from Leicester, through the east of Blaby District, and on through rural Harborough and ultimately heading south to Northampton. Finally, Blaby District’s south western boundary links to the A5 cross country route. Locally, the A5 provides a link south to the strategic logistics facility of Magna Park, in Harborough and then on to equivalent facilities on the edge of Rugby at Junction 18, M1.
- 4.21 Narborough Railway Station falls on the Leicester to Birmingham New Street line. No other Blaby town falls on a passenger railway line.
- 4.22 In terms of services, Fosse Park has established itself as one of the largest out of town retail locations in the UK. It is a higher order centre, alongside Leicester City Centre. Town centres in Blaby District generally offer only local scale services.

The Blaby District FEMA

- 4.23 Based on the above evidence, the Blaby District FEMA clearly includes the west Leicestershire settlement area of Leicester, Hinckley and Bosworth and Harborough (see Figure 11). Nearly 35,000 commuter movements were recorded to and from those locations in 2021. The three locations also benefit from strong road links, while Leicester, extending to include Fosse Park in Blaby District, is a regional centre for retail and services.

Figure 11 – The Blaby District FEMA



Source: BE Group, 2025

- 4.24 Commuting also showed strong links with Oadby and Wigston, Charnwood and North West Leicestershire, with the latter two sharing the M1 Corridor with Blaby District. Strong commuting and road links were also noted with West Northamptonshire.
- 4.25 Blaby had a weaker relationship with other parts of Leicestershire, such as Melton, as well as Warwickshire, and accordingly these locations are not reviewed further. The purpose of the FEMA is to consider key economic relationships rather than all possible cross boundary relationships.

Neighbouring Areas

- 4.26 Having reviewed the FEMA of Blaby District, the remainder of this section considers each of the districts which fall within that FEMA on an individual basis, to understand strategic and cross boundary issues which may impact on Blaby District. In all cases, BE Group consulted with the relevant local authorities on their policy positions as of Autumn 2024. In the case of the Leicester and Leicestershire authorities, BE Group completed much of the employment land evidence base which informs their emerging Local Plans.

Leicester and Leicestershire

Charnwood

- 4.27 The new Charnwood Local Plan EiP, is nearing conclusion and a Main Modifications consultation closed in September. The Inspectors are currently considering the representations received. Plan adoption is anticipated by the end of 2024.
- 4.28 The new Plan proposes ten employment allocations for 66 ha of industrial land and 15.8 ha of offices plus the 73 ha Loughborough Science Park, aimed at the high tech and science market. This is to meet needs of 11.92 ha for offices and 43.55 ha for general industrial and small-scale warehouse units as identified in the Leicester and Leicestershire HENA (2022). Charnwood Council also agreed to take 23 ha of Leicester's unmet need, which is additional to the local requirement. This is the only external employment land Leicester City requires to support its emerging Local Plan (see below). There is no further requirement of Blaby to address.
- 4.29 The main strategic sites are located around Loughborough and the Leicester Principal Urban Area, and include:
- Loughborough Science Park – Loughborough University is undertaking an updated masterplan of opportunities here. The University now owns all the land and duelling on adjoining A-Roads is now completed. No development has occurred, to date, however
 - West of Loughborough SUE – Now has consent for a very large B2/B8 unit. Access is in place for delivery and housing development has started
 - North East of Leicester SUE – Housing development has started. No employment development is expected till later in the Local Plan period though
 - North of Birstall SUE: (Broadnook Garden Village) – Masterplan in place showing an employment option at the A6/A46. Housing development has started
 - Watermead Business Park, Syston – 12 ha of employment land on the A46, identified at the A46/A607 Hobby Horse Roundabout. A Phase II development of up to 61,000 sqm of warehouse/industrial space, known as The Boundary Real Estate (Boundary) received Outline consent in April 2024.
- 4.30 Charnwood and Blaby, along with North West Leicestershire and Harborough, will compete for strategic B2/B8 requirements along the M1 Corridor. Charnwood presently has a larger quantum of land to offer such businesses.

4.31 As noted above, Charnwood is a net exporter of labour to Blaby District, likely reflecting the attractiveness of Blaby District's employment facilities around Junction 21/21a, M1 and labour interrelations in the Leicester Principal Urban Area more generally.

Harborough

4.32 Harborough Council adopted the Local Plan 2011-2031 in April 2019. The next Local Plan was subject to an Issues and Options public consultation in early 2024. A full draft Plan is now being produced which will be subject to further consultation in early 2025.

4.33 The adopted Local Plan allowed for 59 ha of employment land, with supply focused on Market Harborough and Lutterworth, particularly:

- Airfield Business Park, Market Harborough (6 ha) – Partially developed allocation. The Business Park includes the Harborough Innovation Centre, which offers 53 serviced office suites ranging from 15-100 sqm. An application for an additional 11 business units and two drive-thru food and drink units, on the adjoining Airfield Farm allocation, was approved in July 2024. One of the commercial units is set to be leased to Bramble Foods, a fine foods manufacturer and distributor employing more than 150 people in Market Harborough
- Compass Point Business Park – Only infill plots remaining
- Lutterworth East Strategic Development Area – Proposed for 2,750 new homes, schools, shops and 10 ha for E(g)/B2 uses, 13 ha for B8. The main scheme was consented in 2020, but no significant delivery has occurred to date. LCC is now pursuing a revised approach which will see the business space developed first, marketing the 2.4 ha Swift Valley Business Park and investing in infrastructure to open up the wider area for development
- Kibworth (6 ha) – Now under development as Beauchamp Business Park. Construction of Phase One began in September 2023, and Phase Two began in summer 2024 with completion in early 2025. The Business Park will offer freehold and leasehold light/general industrial units of 119-937 sqm each.

4.34 Magna Park, Lutterworth is Europe's largest dedicated distribution park, providing some 700,000 sqm of warehouse and distribution space. It accommodates 29 major distribution operators including Asda, Nissan, Toyota, Argos, DHL and Lidl. In April 2019, consent was granted, at appeal, for a further 280,000 sqm of B8 warehousing here, referred to as Magna Park North. To date, B8 units have been completed and occupied here by Amazon, Wayfair, Bleckmann and Iron Mountain. A biomethane refuelling station, petrol filling station with ancillary retail and drive through restaurants is also consented at the A5/Mere Lane Junction.

4.35 B8 facilities here will compete with their equivalents along the A5 and M1 Corridors, including road-related schemes in Blaby District. Magna Park retains considerable short-term growth potential. In the long term, however, the site is nearing its capacity.

Hinckley and Bosworth

4.36 BE Group completed an Employment Land and Premises Study for Hinckley and Bosworth Borough Council in 2020. These identified needs of 54.46 ha, to 2036, based on average past take-up rates of 2.84 ha/year since the mid-1990s.

4.37 The emerging Local Plan saw a Regulation 18 Consultation over July-September 2024. The production of Local Plan evidence base is programmed to be complete by February 2025 while public consultation on submission Draft Plan (Regulation 19) is programmed for January – February 2025 and Submission of the Plan for examination by summer 2025.

4.38 In Hinckley and Bosworth a lot of recent strategic scale growth has been at Bardon, overlapping the boundary with North West Leicestershire. Falling north of Blaby District, this area never the less links back to Blaby via the M1. Recent developments of primarily B8 units here include Mountpark Bardon II and Former Nailstone Colliery, Nailstone (Interlink South) and are now home to major facilities for Amazon and VF Corporation.

4.39 Another area of overlap is along the A5/A69 Corridor which is home to several large B2/B8 facilities including Hinckley Commercial Park (Logix Park) and the more recently completed Hinckley Park (31 ha, 121,033 sqm of space).

4.40 Hinckley and Bosworth has two identified SUEs, in Barwell and Earl Shilton, but delivery of employment uses is only likely on the Barwell SUE.

- 4.41 In Barwell, a consortium of developers, including Taylor Wimpey, Ainscough Strategic Land and Barwood, received outline planning consent, in 2013, to bring forward the SUE, subject to a Section 106 agreement. The consent allows the in-principle delivery of up to 24,800 sqm of B2 and B8 accommodation, on a 6.2 ha area immediately west of Barwell Industrial Estate. However, ongoing discussions and disputes between the landowners to get them to sign up to the Section 106 (which amongst other clauses, commits the relevant parties to deliver an employment element) have delayed the project for over a decade now and it remains unclear when, and under what circumstances delivery will occur.
- 4.42 The Motor Industry Research Association (MIRA) facility on the A5, HORIBA MIRA, was awarded Enterprise Zone status in August 2011 and subsequently secured a £19.5 million Regional Growth Fund Grant. Since that time over 12,000 sqm of B-Class floorspace has been developed, with some 59 ha of development land remaining. HORIBA MIRA now has 35 tenant companies, providing some 800 jobs, including several Tier One automotive manufacturers such as Aston Martin, Bentley and Jaguar Land Rover. In the 2020s, developments have included the opening of a £1.4 million Large Climatic Vibration Library, an ASSURED CAV facility for combined engineering and testing and new crash testing facility This major facility has larger than local influence and draws labour from a wide catchment. However, the focus of HORIBA MIRA is on the automotive sector, which links more to facilities in Coventry than anything in Blaby District.
- 4.43 Broadly the eastern settlements of Hinckley and Bosworth – Groby, Ratby, Desford and Markfield – are strongly linked to the Leicester Principal Urban Area, with high rates of in commuting to/from both Blaby District, relevant areas of Charnwood and Leicester, as noted above. Western settlements, including Hinckley town, have stronger economic links to Warwickshire.

Leicester

- 4.44 Leicester Local Plan 2020 to 2036 reached Submission (Regulation 19 publication) stage in early 2023 and is now subject to EIP. Over 2019-2020 BE Group completed an Economic Development Needs Assessment for Leicester identifying needs of 65 ha to 2036. The Local Plan proposes 29.08 ha of land within the city boundary to help meet this need, in six sites:
- Former Western Park Golf Course (9.74 ha)

- Beaumont Park (7.53 ha)
- North of Birstall Golf course /East of Ashton Green (2.4 ha)
- Eastern part of Thurcaston Road/Hadrian Road open space (2.7 ha)
- Mountain Road (2.1 ha)
- East of Samworth's Bradgate Bakery (5.0 ha).

4.45 It is expected that these sites will be delivered at quite a high density and so will ultimately produce floorspace equivalent to over 34 ha of land. These locations are found in the north and west of the city, close to the boundaries with Charnwood and Blaby.

4.46 Charnwood Borough Council has also agreed to provide 23 ha to help meet this need, as referenced above, and as set out in the Leicester and Leicestershire Statement of Common Ground on Housing and Employment Need (June 2022).

4.47 Locations with a larger than local influence in Leicester will include locations which fall into the Leicester and Leicestershire Enterprise Zone, including Pioneer Park, the former John Ellis site, Waterside and St. Margaret's in, and around, Leicester City Centre. Historically, that market has extended west to include Grove Park, supporting businesses that need more direct access to the motorway corridors. Leicester remains a major regional centre for the office economy, with some 34,000 employed in office-based sectors, within the city, many of those drawn from the wider County, including Blaby District. To help ensure the ongoing strength of Leicester's office economy the EDNA (2020) identified a need for 46,000 sqm of additional office space, with 20,000 sqm of new offices proposed at the Railway Station and 20,000 sqm of office floorspace in the Cultural Quarter at St George's. The other 6,000 sqm is now developed in the Waterside Character Area, including the 3,065 sqm No1 Great Central Square, Vaughan Way.

- 4.48 Most City Centre office occupiers are micro-firms, employing less than 10 staff each, with comparatively few larger businesses present. However, despite a limited critical mass of big firms, the view of Stakeholders in the EDNA (2020) was still that Leicester was of interest to larger regional and national businesses. Demand was from traditional financial services firms and companies who provide business to business services, plus the high-tech specialisms of the Enterprise Zone. London and Nottingham were common sources of large enquiries, and one attraction of Leicester is its large body of skilled graduates. The New Walk area was a focus for market interest although there was a shortage of Grade A space to meet needs.
- 4.49 Leicester's hub for tech and knowledge economy businesses is Pioneer Park. It is home to the National Space Centre and the DOCK incubator, supporting 42 innovative, knowledge-based technology businesses. Future developments here will include Space Park Leicester, a global hub and collaborative community focusing on space, space-enabled technologies and data developed by the University of Leicester. In addition, further managed workspace adjacent to and opposite the existing DOCK will be delivered by Leicester City Council. The adjacent National Space Centre is also building a new conference facility to add to the visitor destination and educational offer within their complex.
- 4.50 The St. George's Character Area or the Cultural Quarter is a focus for creative industries in Leicester and Leicestershire.
- 4.51 Although its economy is focused on service sector uses, Leicester still employed 20,000 in manufacturing, in 2018. This was proportionally in line with East Midlands averages though. Requirements were for units up to 10,000 sqm each with larger industrial demand focused on the major established industrial estates in the west and north of the city.
- 4.52 Leicester also has a strong concentration of textile uses in and around the Spinney Hills area, as well as a high number of other textile businesses throughout the city. Although frequently located in older buildings, such businesses still employ large numbers and utilise modern machinery is evident inside.

North West Leicestershire

- 4.53 The North West Leicestershire Local Plan was adopted in 2017 and provides the current planning policies for the district for the 2011 to 2031 period. A review has now commenced with a broad strategy for employment and housing identified in 2022. The Council is now progressing Proposed Policies, Proposed Housing and Employment Allocations and a review of 'Proposed Limits to Development' as well as draft Local Plan Policy Maps, with Reg 18 stage Local Plan consultation held over February-March 2024. The intention is to submit the plan for Examination before December 2026, the cut off for submissions under the current NPPF system.
- 4.54 The broad approach of the new Plan would be to focus growth on the core settlements of Coalville, Ashby and Castle Donnington, plus local service centres such as Kegworth, Measham and Ibstock.
- 4.55 The identified employment land need, to 2040, is for 75,125 sqm of offices, of which 10,506 sqm or 1.75 ha was outstanding as of 2023. The industrial and small warehouse requirement was 339,794 sqm, of which 114,562 sqm or 28.64 ha was outstanding as of 2023. As discussed in Section 2.0, there is also a Leicester and Leicestershire wide strategic logistics requirement based on the Warehousing and Logistics in Leicester and Leicestershire: Managing Growth and Change study (2022). For the period 2020-2041 this identified county wide residual needs for 307 ha of rail related logistics and 112 ha of non-rail related. Further work is underway apportioning that need, by local authority area, and it is expected that North West Leicestershire will accommodate a sizable share it.
- 4.56 The strategic sites, set out in the Proposed Housing and Employment Allocations DPD, are:
- Site EMP90 (part): Land south of East Midlands Airport (81 ha, including landscaping) – The wider East Midlands Airport site contains several large-scale distribution premises, the largest being DHL Cargo Terminal and Distribution Hub. It is part of East Midlands Freeport along with SEGRO Logistics Park East Midlands Gateway, the Ratcliffe-on-Soar Power Station site in Rushcliffe, Nottinghamshire and the East Midlands Intermodal Park (EMIP) in South Derbyshire. The development land is promoted by SEGRO for some 300,000 sqm of B8 logistics although the Freeport benefits expire in 2026

- Site EMP82: Land to the north of J11 A/M42 (28 ha) – Growth land building on the Mercia Park scheme which is home to Jaguar Land Rover and DSV Group.
- 4.57 Other strategic locations including East Midlands Distribution Park, Castle Donnington (Former Castle Donnington Power Station) and Segro East Midlands Gateway Logistics Park, alongside Bardon Industrial Estate at Junction 22, M1 are largely complete.
- 4.58 Overall, North West Leicestershire is expected to remain a focus for at least road related B8 logistics activity, in Leicester and Leicestershire, competing with its neighbours along the M1. North West Leicestershire clearly has strong linkages to Blaby District and the rest of Leicester and Leicestershire, but its commuting and economic connections to Nottingham and Derbyshire are also strong.

Oadby and Wigston

- 4.59 Oadby and Wigston completed a Reg. 18 Consultation on a Preferred Options Document over April/May 2024. The next round of public consultation is due to take place in Winter 2024/25 on the Pre-Submission Draft Local Plan (Reg 19), and it will be that document that will contain information on proposed site allocations and associated Policies. It is intended to take the Local Plan to Examination by Autumn 2025, with estimated Plan adoption by Summer/Autumn 2026.
- 4.60 The HENA (2022) identified that Oadby and Wigston had a total need, to 2041, of just 4.3 ha of employment land, equating to 1.3 ha of Offices as well as 3.1 ha of Industrial and Distribution. Given the lack of market interest in the 8+ ha allocated in the current Local Plan to 2031 and the reduced projected need of 4.3 ha up to 2041, the Council's strategy for the emerging Plan period will be to retain and roll forward the current Local Plan employment allocations. Therefore, no further land will be allocated for employment development as the existing sites are in the most appropriate locations to meet the Borough's local need.
- 4.61 Both previous employment land allocations and the existing industrial estates/business parks of Oadby and Wigston are of a purely local scale and are unlikely to have significant cross boundary impacts beyond the areas of eastern Blaby District which immediately adjoin Wigston and South Wigston.

West Northamptonshire

- 4.62 West Northamptonshire Council is currently preparing a new local plan for the period up to 2041, which will replace the West Northamptonshire Joint Core Strategy Local Plan (Part 1), 2014 and the Part 2 Local Plans which were adopted for the Daventry, Northampton and South Northamptonshire areas in the 2020s. Consultation on a Regulation 18 Draft Plan ran between April and June 2024. The 2014 Adopted Core Strategy made provision for a minimum net increase of 28,500 jobs in the period 2008-2029
- 4.63 West Northamptonshire is a large and diverse district, with its main town, Northampton, being some distance from Blaby District. Most influential for Leicester and Leicestershire will be Daventry International Rail Freight Terminal (DIRFT), located at Junction 18, M1 and connected to the A5, which sits south east of Rugby.
- 4.64 The original DIRFT I development of approximately 120 ha was built during the 1990s, of which only DIRFT South (DIRFT Railport) had a direct rail connection. An extension, often referred to as DIRFTII, of about 54 ha, received planning permission in 2005, and is designed to have all facilities rail connected, the first occupier of DIRFTII was Tesco, whose distribution centre reached completion in late 2011. DIRFT III in the north has been developed in the 2020s by Prologis on a design and build basis. It is dominated by the 21.5 ha Royal Mail Midlands Super Hub, which is the Royal Mail's largest automated parcels facility, capable of processing up to 90,000 items an hour. Other large scale logistics facilities for the NHS, Warrens, Inditex and Dunelm have also been completed over the last two years, while DIRFT III has its own rail freight terminal.
- 4.65 Collectively, the three phases of DIRFT employ over 10,000 people with DIRFT IV now proposed on land east of the M1. These facilities will clearly compete with their equivalents in Leicester and Leicestershire.
- 4.66 As mentioned, links to more distant Northampton are likely to be more modest although the town includes some sizable industrial estates at Junction 15A, M1 which will likely draw some labour from Leicester and Leicestershire. Northampton also has a strong office economy, linked to the Northampton Waterside Enterprise Zone, which includes 120 ha of land with the potential to create over 420,000 sqm of high value commercial and industrial floorspace. This is likely to be secondary, in the Blaby context, compared to the more immediate economy of Leicester.

Summary

- 4.67 Based on a mix of geographic evidence and commuting data, the FEMA of Blaby District includes all of Leicester and Leicestershire apart from Melton. Blaby District also has strong commuting links with West Northamptonshire along the M1 and A5 Corridors. The other areas of the East Midlands have more limited relationships with Blaby District.
- 4.68 In Charnwood, a range of larger schemes are proposed, most of which link to the Leicester Principal Urban Area and to Loughborough and so interrelate and compete with equivalent schemes in the east of Blaby District. If brought forward, Loughborough Science Park would meet science and technology requirements from across Leicester and Leicestershire, however, there has been no delivery here, to date and full take up of the 73 ha of allocated land will likely be a long term prospect.
- 4.69 The strongest link to Harborough is Magna Park, Lutterworth, an established strategic scale B8 logistics scheme which will provide considerable competition to equivalent schemes across Leicester and Leicestershire. In the short term Magna Park has further growth potential, in the longer term it is close to capacity, opening opportunities elsewhere. Also, its existence has clearly not prevented logistics sector growth elsewhere along M1 Corridor.
- 4.70 Hinckley and Bosworth has seen the development of new strategic B2/B8 units at Bardon and around the A5/M69 Junction, but that is now complete.
- 4.71 Unsurprisingly, Blaby District has very strong linkages with Leicester, with 18,418 commuter movements recorded between the two locations in 2021. Leicester is a long established centre of the office market in the East Midlands, both in terms of the City Centre generally and the associated high tech centre of Pioneer Park. Historically, that market has extended west to include Grove Park, supporting businesses that need more direct access to the motorway corridors. Overall, this will not change, limiting the capacity for private sector office sector growth in the surrounding county. Recent years have seen the successful development of some Grade A suites in the City Centre, boosting confidence about future growth. The overall net gain of stock is still expected to be modest though, and it remains to be seen if equivalent gains on the periphery of the Leicester Principal Urban Area are possible.

- 4.72 North West Leicestershire has been a historic focus for strategic B8 development in the county. While existing B2/B8 schemes here are now largely full, North West Leicestershire retains considerable long term growth capacity, most notably at East Midlands Airport where 81 ha (gross) is available as part of the East Midlands Freeport. As other strategic schemes in the sub-region reach capacity, this area will likely be the main competition for equivalent logistics schemes in Blaby District, long term.
- 4.73 At present, SEGRO Logistics Park East Midlands Gateway, North West Leicestershire and DIRFT in West Northamptonshire are the only rail related logistics schemes in the FEMA. SEGRO Logistics Park is now full and the existing DIRFT phases are also nearing capacity, although a DIRFT IV is proposed it is not yet known if it will be identified in the next West Northamptonshire Local Plan.
- 4.74 In Oadby and Wigston there are inevitably some cross boundary movements with immediately adjoining parts of Blaby District, but further economic growth here is expected to be at the local scale only.

5.0 EXISTING EMPLOYMENT SITES AND PREMISES

Introduction

- 5.1 This section reviews the existing portfolio of undeveloped employment land (land supply), comprising commitments in terms of planning permissions and allocations. This is distinct from the opportunities for additional employment land which are considered in Section 7.0. It also reviews 26 developed Employment Areas comprising industrial estates, business parks, rural and urban businesses centres and facilities for larger individual businesses.
- 5.2 Blaby District needs a balanced portfolio of land to accommodate a sustainable, growing economy that can respond to dynamic market conditions, changing business needs and working practices.

Land Supply

- 5.3 The Council tracks 'New Employment Land Granted Permission since 1st April 2011' as part of its annual monitoring. The latest, 2023/2024 data indicates an overall supply of 64.74 ha. However, that includes now completed consents. Excluding completions leaves commitments, comprising consented sites not started or under construction, of 15.04 ha in nine sites.
- 5.4 Additionally, Policy SA3 – 'Employment Land Provision – New Allocation' of the adopted Blaby District Local Plan, Local Plan (Delivery) DPD (2019) allocates a 33 ha (gross) site, Land West of St Johns, Enderby, primarily for B8 storage and distribution uses. This land remains undeveloped and is also considered here.¹ The report 'Warehousing and Logistics in Leicester and Leicestershire: Managing growth and change, 2022' also identifies the site at Land West of St Johns as a commitment in terms of strategic B8. Thus, if the District Council considers that the Land West of St Johns site forms part of the 'strategic' supply required to meet wider B8 needs (thereby removing 33.3ha from the potential 'local' supply), the emerging Local Plan will need to make provision for additional employment land to meet the residual local requirement identified by this study (as is discussed in Section 6.0).

¹ This site is included in the analysis as the main Local Plan allocation. It also has an Outline planning consent although that was after the latest 2023/2024 Monitoring Data was produced, hence it is considered separately from sites identified in monitoring.

- 5.5 Table 8 schedules the employment sites in the land supply in Blaby District. It outlines their size; provides comments on status (for example, owner intentions) and any development proposals on some or all the land; together with an assessment as to when they might come forward for development or use (and an explanation of how that period has been arrived at). This assessment of timescale is based upon several factors – market demand, overview (from discussions with stakeholders and site owners), ownership situation, planning status, infrastructure and services required. Proformas for each site are provided at Appendix 3.
- 5.6 Site 1: Land West of St Johns, Enderby now benefits from Outline consent for a strategic scheme, for the full 33.30 ha, and is controlled by an experienced owner and land promoter. The ongoing good demand for larger B2/B8 uses along the M1 Corridor gives it a strong chance of delivery, subject to securing Reserved Matters planning consent(s).
- 5.7 In terms of the other consented sites, there appears to be no realistically available land at Site 2: Glenfield Park / Optimus Point, Ratby Lane / Kirby Road Residual, Glenfield. Site 7: Land at Enderby Substation, Desford Road, Enderby is under development for a specialist use and not available to meet broader development needs. At Site 8: Former Railway Embankment, Coventry Road, Narborough a historic planning consent has seen no progress for some years, and the land does not appear realistically available.
- 5.8 Elsewhere the land is available, with limited constraints and at least a high level path to delivery even if the details of development (who will deliver, with what funding and to what timetable) have yet to be established. This includes Site 3: Land north of Leicester Lane, Lubbesthorpe SES Residual, Lubbesthorpe; Site 4: Sustainable Urban Extension at Lubbesthorpe, Lubbesthorpe and Site 6: Land at Everards Meadows, Cooper Way, Enderby.
- 5.9 Excluding Sites 2, 7 and 8, but assuming continued availability at the others gives a realistic committed employment land supply of 44.03 ha in seven sites. This comprises 33.30 ha from Site 1: Land West of St Johns, Enderby and 10.73 ha from other consents.

Table 8 – Employment Sites Schedule

Name	Initial Size, ha	Proposal	Constraints	Status	Realistic Size, ha	Availability, years/ Comment on Availability/ Deliverability
Site 1: Land West of St Johns, Enderby	33.30	<p>Site Allocations 'Policy SA3 – Employment Site Allocation' allocates this site primarily for B8 (storage and distribution) uses. Ancillary uses and light/general industrial uses will be allowed "where it can be demonstrated that any adverse transport impacts can be mitigated." Planning applications for office uses of 2,500 sqm or more shall be subject to a sequential test and accompanied by an impact assessment.</p> <p>The report 'Warehousing and Logistics in Leicester and Leicestershire: Managing growth and change, 2022' identifies the site at Land West of St Johns as a commitment in terms of strategic B8. If the District Council considers that the Land West of St Johns site forms part of the 'strategic' supply required to meet wider B8 needs (thereby removing 33.3ha from the potential 'local' supply), the emerging Local Plan will need to make provision for additional employment land to meet the residual local requirement identified by this study (as discussed in Section 6.0).</p> <p>The site has Outline Consent (App. No. 23/1066/OUT)</p> <p>The proposal is for a B2/B8 industrial park, providing 106,568 sqm of gross external space. The illustrative Masterplan shows five main B2/B8 units of 14,098-43,938 sqm and a scheme of smaller industrial units in the south east. Also referred to as the Enderby Logistics Hub</p>	<ul style="list-style-type: none"> • Trees on site • Public rights of way cross the site • Housing adjacent • Includes 'best and most versatile agricultural land' 	Now being marketed to developers by the Drummond Estate and land promoter Landchain	33.30	<p>1-5</p> <p>The land now has Outline Consent and is being promoted for development by an experienced land promoter. Given the ongoing demand for larger B2/B8 premises in the M1 Corridor, as discussed in Section 4.0, the chances of delivery here are very high</p>
Site 2: Glenfield Park / Optimus Point, Ratby Lane / Kirby Road Residual, Glenfield	0.59	<p>The site falls within the wider Outline consent for E(g)/B-Class employment development (App. No. 12/0457). With eight key Reserved Matters Consents making up the main development. Part of the Key Employment Site Optimus Point, Glenfield under Policy SA5 – 'Key Employment Sites and Other Existing Employment Sites' Blaby District Local Plan, Local Plan (Delivery) Development Plan Document (2019).</p>	N/A	With the completion of Unit 20, Optimus Point appears practically full.	-	<p>-</p> <p>Although some units have space for expansion, within their own curtilages, there are no</p>

Name	Initial Size, ha	Proposal	Constraints	Status	Realistic Size, ha	Availability, years/ Comment on Availability/ Deliverability
		<p>The last large scale unit, of 8,800 sqm (Unit 20) is currently at a late stage of construction. It is intended to be occupied by Geary's Bakeries. With the completion of that property all main development plots with Optimus Point will be complete. Other, undeveloped land within the Employment Area falls into the curtilage of occupied properties or is used for environmental mitigation/landscaping.</p>				<p>longer any defined development plots.</p>
<p>Site 3: Land north of Leicester Lane, Lubbesthorpe SES Residual, Lubbesthorpe</p>	<p>5.52</p>	<p>Part of the Key Employment Site Lubbesthorpe Strategic Employment Site, Lubbesthorpe under Policy SA5 – 'Key Employment Sites and Other Existing Employment Sites' Blaby District Local Plan, Local Plan (Delivery) Development Plan Document (2019).</p> <p>No planning consents cover the residual area, but it is covered in the main Outline Consent for New Lubbesthorpe (App. No. 11/0100). This established the principle of the wider 21 ha Strategic Employment Site, of which 5.52 ha remains.</p> <p>Land to the south was developed for two large B8 logistics units, totalling 53,023 sqm, covered under planning App. No. 17/0431. Both units are now developed and let as Leicester Commercial Park.</p> <p>There are no identified plans to develop the residual land. However, this land would be opened up by the new link road, from Dorsey Way north across the M69 to New Lubbesthorpe. This is programmed for the Third Phase of the New Lubbesthorpe development., likely in the later 2020s.</p>	<ul style="list-style-type: none"> • Areas of woodland on the site • Public right of way passes through the site • Farm buildings adjacent • Pond on site 	<p>Available land, not subject to any specific plans for change, but with a good prospect of being opened up by infrastructure investment this decade.</p>	<p>5.52</p>	<p>5-10 Market demand for B2/B8 units remains strong, as demonstrated by the recent consent at nearby Site 1: Land West of St Johns, Enderby, making its eventual take up likely. It is most likely to be taken up when the new access route is completed. The link road is programmed in Phase 3 of the New Lubbesthorpe programme, in years' 10-13 since</p>

Name	Initial Size, ha	Proposal	Constraints	Status	Realistic Size, ha	Availability, years/ Comment on Availability/ Deliverability
						development started in 2016.
Site 4: Sustainable Urban Extension at Lubbesthorpe, Lubbesthorpe	2.37	<p>The wider Outline Consent (App. No. 11/0100), secured in 2014, was for:</p> <ul style="list-style-type: none"> • 4,250 dwellings • The Strategic Employment Site (Discussed in Site 3) • The Gateway Business Centre of 4,600 sqm for E(g) Uses • A District Centre, containing a mix of retail, commercial, employment (2,000 sqm of E(g)), community, leisure, waste and residential uses • Two smaller Local Centres containing a mix of retail, community, health, leisure and residential uses. Potentially including 250 sqm of flexible E(g) workspace each • Schools • Health Centre. <p>Development commenced in 2016. As of 30th September 2024, 1,128 homes are occupied, with a primary school, community centre and health facilities completed. None of the E(g) employment facilities have been completed to date, and no Reserved Matters applications have been submitted on the subject.</p> <p>The Business Gateway is programmed for Phase 2, or 7-10 years after scheme start in 2026. While the Outline Consent commits to the ultimate delivery of this scheme, it does allow for it to be brought forward at a later phase if demand does not support its immediate delivery. Thus, this scheme, and other employment floorspace in the District/Local Centres may not ultimately come forward until the 2030s.</p>	Assumed none on the specific sites to be developed for E(g) Uses	Land remains available, subject to commitments made in the Outline planning application. However, there are no clearly defined plans as to how these specific elements of the wider New Lubbesthorpe scheme will be brought forward. The Council should seek greater clarity on exactly when, and by whom, the main E(g) uses will be brought forward, and any barriers to delivery.	2.37	5-10 Although there are no specific plans for delivery currently, these uses are committed to in the wider masterplan/consent. The scale of the New Lubbesthorpe development also allows opportunities for cross funding development here, and creates sizable local demand, although public sector bodies may need to encourage/support ultimate development.

Name	Initial Size, ha	Proposal	Constraints	Status	Realistic Size, ha	Availability, years/ Comment on Availability/ Deliverability
		Road access, Meridian Way, is in place to the identified site for the Gateway.				
Site 5: Airmans Rest Business Park, Ratby Lane, Kirby Muxloe	0.52	<p>Full planning consent (App. No. 21/0303)</p> <p>Proposal is for a 2,237 sqm industrial building, to be developed as a second facility for Reflex Label Group, developed to the north of the existing factory.</p> <p>Development has not commenced as of October 2024.</p> <p>The development will be for the use of Reflex, on the Reflex site, but the position of the unit means that it could be made available to other businesses, if it became surplus to requirements. Thus, it remains part of the broader land supply for the district.</p>	<ul style="list-style-type: none"> Foundations of previous buildings on the site 	<p>Fully consented, but no evidence of delivery to date.</p> <p>Development will likely be driven by the internal operational needs of Reflex, linked to business performance and existing production capacity.</p>	0.52	<p>1-5</p> <p>Development will likely be driven by the internal operational needs of Reflex, making it difficult to identify an exact timetable for delivery. However, subject to that business's internal decision making there appear to be no barriers to delivery and the land remains available to meet needs.</p>
Site 6: Land At Everards Meadows, Cooper Way, Enderby	1.99	<p>Outline planning consent (App. No. 22/0110)</p> <p>The proposal is for an office campus with a GFA of up to 9,290 sqm together with a hotel of up to 5,575 sqm. This would represent Phase II of the Everards redevelopment, with Phase I being the Brewery and associated leisure, hot food and retail uses which are completed. The new office campus is identified as comprising seven buildings of 372-697 sqm each, to be</p>	None, development plots are serviced	The land benefits from an Outline Consent. Delivery will be dependent on securing developer and,	1.99	<p>5-10</p> <p>Delivery could prove challenging in the present market, however,</p>

Name	Initial Size, ha	Proposal	Constraints	Status	Realistic Size, ha	Availability, years/ Comment on Availability/ Deliverability
		<p>developed on land in the west, in two defined development plots.</p> <p>No development has commenced as of October 2024.</p> <p>A reserved matters application for the hotel was submitted in early November 2024 (App. No. 24/0945/RM), suggesting that this will be progressed quite quickly as Phase 2A of Everards Meadows. The offices will comprise Phase 2B and will be the subject of a separate Reserved Matters application.</p> <p>It remains to be seen how quickly the second Reserved Matters application, and the office development will come forward. Experience suggests that office schemes can be difficult to viably deliver, even in prime locations on the strategic road network. High construction costs against the level of rents achievable are frequently an issue. However, new offices have been delivered on nearby employment areas, including Grove Park providing evidence that this scheme can ultimately be achieved. It may require securing developer partners, pre-let/pre-sale occupiers or funding support, however.</p>		assumed, investor input.		experience on adjacent sites suggests that the right mix of E(g)(i) offices can be delivered at this prime location, particularly if occupiers can be secured in advance of development. The retail, leisure, hotel uses already delivered/proposed may also generate capital receipt to cross fund an office development here.
Site 7: Land at Enderby Substation, Desford Road, Enderby	2.16	<p>Full planning consent (App. No. 20/0896/FUL), subject to some variation of conditions consents.</p> <p>Consent is for a Battery Storage Facility with an export capacity of up to 50MW (later increased to 57MW) and associated infrastructure, north of the existing National Grid facility. It will include Battery Storage containers totalling some 51 sqm. The scheme was under construction as of October 2024.</p>	Assumed none as the scheme is under construction	N/A	-	- Specialist development, not part of the realistic supply, and under construction.

Name	Initial Size, ha	Proposal	Constraints	Status	Realistic Size, ha	Availability, years/ Comment on Availability/ Deliverability
		<p>Proposal is for a specialist use, for the main existing occupier. The land, or the developed facility cannot be offered to other businesses or meet general requirements for E(g)/B2/B8 accommodation. For these reasons it is not considered part of the realistic employment land supply for the purposes of this Study.</p>				
<p>Site 8: Former Railway Embankment, Coventry Road, Narborough</p>	<p>1.40</p>	<p>Full planning consent (App. No. 92/1358) Proposal for eight industrial units (historic permission)</p> <p>Notwithstanding the view of monitoring that this site is under construction there appears to be little evidence of progress here for some years. The land appears to be in full use for various open storage uses.</p> <p>If it has not been delivered, in full, over 30 years since it was first consented it is unlikely to be so now. Thus, this site is not counted as part of the available supply, for the purposes of this Study.</p>	<ul style="list-style-type: none"> • Land in use for open storage • Possible contamination from existing and previous uses 	<p>N/A</p>	<p>-</p>	<p>-</p> <p>The consent does not appear to be progressing, and the land is in other uses, so the site does not appear to be realistically available employment land</p>
<p>Site 9: John Brindley Transport, Aston Lane, Sharnford</p>	<p>0.18</p>	<p>The site has full planning consent (App. No. 20/1081)</p> <p>The proposal is for the erection of 4 linked portal framed light industrial units which will sit adjacent to the existing commercial light industrial units within the existing commercial complex of buildings at The Farm, the commercial base for John Brindley Transport. These total 1,856 sqm, or 464 sqm each, with two proposed for E(g)(iii) light industrial use and two propose for B8 storage and distribution use.</p> <p>The proposal would comprise an extension to the existing offer of 10 units here (4,900 sqm of floorspace) which are used for third party storage, distribution, light industrial processes and the maintenance of Brindley Transport vehicles. It will meet increased demand from existing commercial tenants and</p>	<p>None (The land is outside of the Flood Risk area for the River Soar)</p>	<p>Fully consented intensification of an existing Employment Area. The implementation will likely be driven by the needs of John Brindley and the relevant other tenants.</p>	<p>0.18</p>	<p>1-5</p> <p>Development prospects are good, reflecting the identified demand for the space and the likelihood of development on land owned and operated by the developer,</p>

Name	Initial Size, ha	Proposal	Constraints	Status	Realistic Size, ha	Availability, years/ Comment on Availability/ Deliverability
		existing John Brindley clients, for longer term storage and distribution to enable stock piling of goods. Development had not commenced as of October 2024.				John Brindley Transport, which appears unconstrained.
Site 10: Land Southwest of Junction with Stanton Lane and Pingle Lane, Potters Marston	0.31	The site has Full Planning Consent (App. No. 22/0595) The change of use of agricultural land to B8 open storage use with 110 storage containers (extension to the existing site). The consent appears to have been partially implemented in the north, which is now in use for container storage in a layout consistent with the application drawings.	Assumed none given the partial implementation.	The scheme has been partially implemented; it is assumed implementation of the remainder will be driven by demand for space and the capacity of the existing containers.	0.15 (land still to be developed)	1-5 Scheme is already partly implemented, showing the deliverability of the concept.
Total	48.34				44.03	

Source: BE Group/Blaby District Council, 2024

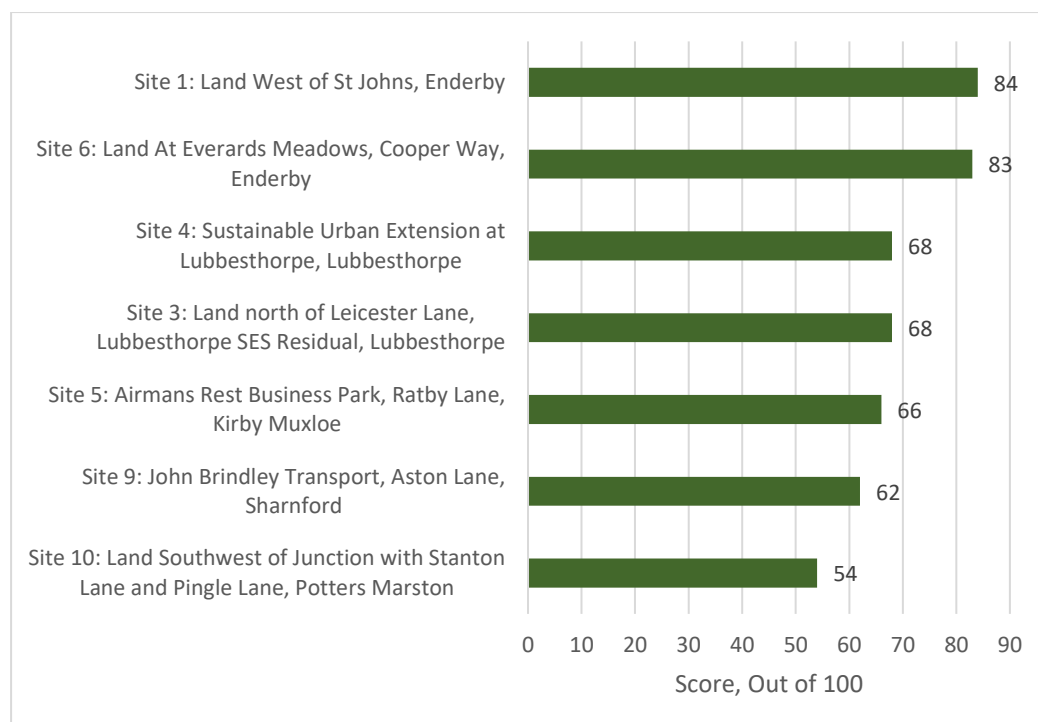
5.10 Of the 44.03 ha, 43.18 ha or 97.8 percent of the realistically available supply is within Enderby and adjacent New Lubbesthorpe. Provision elsewhere, and particularly outside of the Leicester PUA is negligible, with only two very small sites – Site 9: John Brindley Transport, Aston Lane, Sharnford (0.18 ha) and Site 10: Land Southwest of Junction with Stanton Lane and Pingle Lane, Potters Marston (0.15 ha) serving the rural west of the district.

5.11 1.99 ha of this supply, comprising Site 6: Land at Everards Meadows, Cooper Way, Enderby, is consented for offices only. The supply specifically for industrial and warehouse uses is thus **42.04 ha in six sites, assuming Site 1: Land West of St Johns, Enderby remains in the local supply.**

Site Scoring – Realistic Supply

5.12 Each Site outlined within Table 8 has been scored against ten criteria relating to Site Location and Access, Development Prospects, Site Conditions and Availability. The maximum score possible is 100. The Scoring Criteria can be found in Appendix 4 and individual Site scores can be found in Appendix 5. Figure 12 shows the scoring for the five sites identified as comprising the realistic long-term supply. The assessment gives an appraisal of the overall quality of the land resource.

Figure 12 – Blaby District Sites Scoring – Realistic Supply



Source: BE Group, 2024

- 5.13 Unsurprisingly Site 1: Land West of St Johns, Enderby scores best overall, highlighting that this is the main development opportunity of the district. Benefitting from Outline planning consent, the land is very prominently located close to the junction of multiple strategic routes and has a strong prospect of delivery in a short timeframe. Site 6: Land At Everards Meadows, Cooper Way, Enderby also enjoys excellent strategic road access, Outline consent and unconstrained development plots. Even if delivery of the consented office scheme proves challenging, the land remains available to meet needs.
- 5.14 The residual land associated with New Lubbethorpe scores somewhat lower, reflecting its slightly greater distance from the strategic road network, also that there is greater uncertainty about exactly when in the long development process of the SUE they might be brought forward.
- 5.15 The rural Sites, 9 and 10, score lowest, reflecting their more isolated position and very small size. As noted, however, their prospects for delivery remain good.

Hinckley National Rail Freight Interchange

- 5.16 Over September 2023 – March 2025 an application for a Development Consent Order (DCO) for the Hinckley National Rail Freight Interchange was the subject of an Examination by the Secretary of State for Transport. This strategic scheme, put forward by developer Tritax Symmetry (now Tritax Big Box), was located on 187 ha north west of Junction 2, M69, between the Leicester to Hinckley railway line and the M69, south of Elmesthorpe and north east of Hinckley (see Figure 13). It was proposed to comprise:
- Up to 850,000 sqm (gross internal area) of warehousing and ancillary buildings with a total footprint of up to 650,000 sqm and up to 200,000 sqm of mezzanine floorspace, including the potential for some buildings to be directly rail connected if required by occupiers. Initial layouts show nine units of 26,524-135,637sqm each
 - An intermodal freight terminal or ‘railport’ capable of accommodating up to 16 trains per day, plus associated rail infrastructure
 - On site energy generation facilities, including roof-mounted photovoltaic arrays and a gas-fired combined heat and power plant
 - Various access, HGV parking and environmental and landscaping features

- Major off-site highways works including works to M69 Junction 2 comprising the reconfiguration of the existing roundabout and its approach and exit lanes, the addition of a southbound slip road for traffic joining the M69 motorway and the addition of a northbound slip road for traffic leaving the M69 motorway at Junction 2. Also, a new road ('the A47 Link Road') from the modified M69 Junction 2 to the B4668 / A47 Leicester Road with a new bridge over the railway, providing vehicular access to the proposed scheme from the strategic highway network.

Figure 13 – Hinckley National Rail Freight Interchange – Location and Illustrative Layout



Source: Tritax Symmetry, 2023

5.17 However, the scheme was refused by the Secretary of State for Transport on 10th March 2025, due to its negative impact on highways safety at several adjoining locations. At the time of writing it is not clear if a revised scheme will be put forward here, but the existing proposal cannot be considered as part of either the local or strategic employment land supply.

Employment Area Assessments

5.18 BE Group have reviewed the 20 Employment Areas (industrial estates, business parks, rural and urban businesses centres and facilities for larger individual businesses) identified in Policy SA5 – ‘Key Employment Sites and Other Existing Employment Sites’ of The Blaby Local Plan, Core Strategy DPD. These are:

- Blaby Industrial Estate, Blaby
- Rose Business Park, Blaby
- Hazel Drive, Braunstone Town
- Braunstone Town Meridian Business Park (with Osiers Business Park and Lubbesthorpe Gateway), Braunstone Town
- Everards Meadow and Police HQ, Enderby
- Grove Park, Enderby
- Mill Hill Industrial Estate, Enderby
- Next PLC, Enderby
- Warren Business Park, Enderby
- County Hall, Glenfield
- Mill Lane Industrial Estate, Glenfield
- Optimus Point, Glenfield
- Oak Spinney Park and Ratby Lane, Kirby Muxloe
- Lubbesthorpe Strategic Employment Site, Lubbesthorpe
- Carlton Park, Narborough
- Coventry Road Industrial Estates, Narborough
- Foxbank Industrial Estate, Station Road, Stoney Stanton
- Cambridge Road Industrial Estates, Whetstone
- Enderby Road Industrial Estates and Grange Business Park, Whetstone
- The Whittle Estate, Whetstone

5.19 Site visits around Blaby District, combined with analysis of the 2016 report ‘Blaby District: Assessment of Key Employment Sites’ also identified the following additional Areas which accommodate multiple E(g)/B-Class Premises:

- Winston Avenue, Croft
- Croft Quarry Offices, Huncote Road, Croft
- Riverside Court, Croft
- Wharf Way, Glen Parva
- Narborough Wood Park, Desford Road, Enderby

- Watergate Lane, Braunstone Town.

5.20 These additional six areas are also reviewed to determine if they should be protected for E(g)/B2/B8 class uses in the emerging Blaby Local Plan.

5.21 The 26 combined Employment Areas have been appraised and assessed through a combination of site visits, local intelligence and the views of those involved in the property market in those areas. The Areas are mapped in Appendix 6.

5.22 Proformas have been completed for each area and are accompanied by site plans. The proformas adopt the following format, to simplify the data and make it easier to interpret:

- 'Area Name' the Council's designated title for the area, including where necessary the main street and town
- The size of the area, in hectares, is provided based on GIS plans provided by the local authority
- A brief 'Description' is provided in the form of BE Group's comment on the area, the uses it contains and how it relates to adjoining areas
- 'Access Issues' reviews access issues in the area, which will be a key factor that businesses will consider when making relocation decisions. This includes the availability of parking and loading facilities generally and specifically for larger sites
- Valuation Office Agency (VOA) and Nomis data, site surveys and property data is used to provide the following:
 - The total number of units in the area
 - The total floorspace of all premises in the area, in sqm
 - Comparing the previous two figures to give an 'Occupancy Rate'
 - A split of the number of premises, by 'Type' – office, industrial, warehouse and 'other'
 - An indication is provided of the age of properties in each of four categories assessed in 'Buildings Age'. These are pre-1945; post-1945; post-1990 and 'New' (Post 2010)
 - 'Buildings Quality' is also broken down into four category assessments. 'Derelict' is as expected. 'Poor' represents low quality design, externals, and condition. 'Good' equates to modern design, building condition, parking and external area provision. The remaining category is 'Average', covering properties that do not fit any of the other three headings

- The 'Total Floorspace' in the area, in sqm.
- In 'Opportunities for redevelopment/ expansion', vacant land is identified, as is the scope for redevelopment of particular vacant/derelict properties or sites. Greenfield expansion possibilities are also included, showing opportunities for the growth and intensification of the E(g)/B-Class uses here. Reflecting Paragraph: 009 of the PPG Note '*Housing and Economic Land Availability Assessment*' only sites larger than 0.25 ha are considered as opportunities large enough to support growth of significance
- Finally, 'Recommendations' are given on the Area, any key issues and constraints which need to be addressed, and whether the location should be protected, for E(g)/B-Class uses in the next Local Plan.

5.23 The proforma is included at Table 9. The work builds upon a database of premises, derived from VOA data and originally created for the 2006 Blaby District Employment Land Study. It was then updated for the 2011 Blaby District Employment Land Study Refresh. The 2006 Study identified 485 premises in the district's main E(g), B2 and B8 Employment Areas, increasing to 533 by 2011.

Table 9 – Area Assessment Template

Area Name							
Area Size, ha							
Description							
Access Issues							
Total Number of Units		Vacant/Derelict Units			Occupancy Rate, percent		
Buildings Type, number of units		Office (inc. R and D)		Industrial		Warehouse	Other
Buildings Age, number of units		Pre 1945		Post 1945		Post 1990	New
Buildings Quality, number of units		Derelict		Poor		Average	Good
Total Floorspace, sqm							
Opportunities for Redevelopment/ expansion							
Recommendations							

Source: BE Group, 2024

Area Assessment Proformas – Allocated Key Employment Sites and Other Existing Employment Sites

Area Name	Blaby Industrial Estate, Blaby
Area Size, ha	5.65

Area Name		Blaby Industrial Estate, Blaby							
Description		Moderate quality, purpose built linear industrial estate made up of units from the 1970s, 80s and 90s. Self-contained site, focused along a single access road. Blaby Industrial Estate is on an edge of settlement location. It is partly overlooked by housing in the west (Foulds Lane) although some landscape buffering is in place to separate the closest properties. Includes Westleigh Business Park, a scheme of 12, moderate quality, terraced offices, in the east.							
Access Issues		Good prominence to the A426, although junctions can be congested at peak times. The access road through the area is in good condition but constrained by on street parking.							
Total Number of Units	40	Vacant/Derelict Units			9	Occupancy Rate, percent		77	
Buildings Type, number of units		Office (inc. R and D)	12	Industrial	28	Warehouse	-	Other	-
Buildings Age, number of units		Pre 1945	-	Post 1945	18	Post 1990	22	New	-
Buildings Quality, number of units		Derelict	-	Poor	-	Average	40	Good	-
Total Floorspace, sqm		25,263							
Opportunities for Redevelopment/expansion		All land within the boundary is in use. Expansion to the north is blocked by the railway line. Wooded land between Winchester Avenue and the A426 Blaby Bypass appears too narrow, at 5-10 metres wide, to support the development of further units. The total site area is also only 0.17 ha.							
Recommendations		Protect in the Local Plan as an employment area for E/B2/B8 (and appropriate ancillary) uses. See main Recommendation One, Section 9.0 for further details.							

Area Name		Rose Business Park, Blaby							
Area Size, ha		2.91							
Description		Modern business park on an edge of settlement location, comprising mid-sized industrial/warehouse uses plus some offices at the entrance. Includes some trade businesses, but the bulk of the Area is still in office and industrial use. The Area is adjacent to, but generally screened from, a golf course in the north and a caravan storage site to the east. To the south is agricultural land.							
Access Issues		The Business Park is located on a gateway route into Blaby town, close to a junction with the A462. It has a wide, modern internal access road.							
Total Number of Units	10	Vacant/Derelict Units			0	Occupancy Rate, percent		100	
Buildings Type, number of units		Office (inc. R and D)	3	Industrial	5	Warehouse	1	Other	1
Buildings Age, number of units		Pre 1945	-	Post 1945	-	Post 1990	-	New	10
Buildings Quality, number of units		Derelict	-	Poor	-	Average	-	Good	10
Total Floorspace, sqm		7,685							
Opportunities for Redevelopment/expansion		There one undeveloped plot in the Industrial Estate, larger than 0.25 ha – Land south of Rose Way, fronting Lutterworth Road (in front of the Daisy Chain Nursery) (0.37 ha). This falls within two Call for Sites submissions – EBLA003 and EBLA004: Land west of the A426, Blaby, where this and adjoining land was proposed for mixed employment uses.							
Recommendations		Although Rose Business Park includes some trade uses, the bulk of the Area is in E(g)/B-Class uses and is good source of high grade, modern space for Blaby town and surrounding settlements. Protect in the Local Plan as an employment area for E/B2/B8 (and appropriate ancillary) uses. See main Recommendation One, Section 9.0 for further details.							

Area Name		Hazel Drive, Braunstone Town							
Area Size, ha		4.58							
Description		Older former factory space, with good prominence on the main route through Braunstone Town. All space is in motor trade use. The frontage is a large Audi car showroom, service centre and workshop facilities. Lacks critical mass and surrounded by residential. This will limit the scale and nature of business operations which can be accommodated here.							
Access Issues		The Area has a direct access off the A5460 Narborough Road, although only southbound due to the layout of the road here. The Audi showroom has its own access.							
Total Number of Units	3	Vacant/Derelict Units			0	Occupancy Rate, percent		100	
Buildings Type, number of units		Office (inc. R and D)	-	Industrial	-	Warehouse	-	Other	3
Buildings Age, number of units		Pre 1945	-	Post 1945	2	Post 1990	-	New	1
Buildings Quality, number of units		Derelict	-	Poor	-	Average	2	Good	1
Total Floorspace, sqm		10,915							
Opportunities for Redevelopment/expansion		Area is in full use and tightly bound by housing.							
Recommendations		Although protected for employment uses in the adopted Local Plan, all premises now appear to be in motor trade use. The location is isolated from other employment areas and constrained by surrounding housing. For these reasons it is not recommended that the location continue to be protected for E(g)/B-Class uses in the next Local Plan.							

Area Name		Braunstone Town Meridian Business Park (with Osiers Business Park and Lubbesthorpe Gateway), Braunstone Town							
Area Size, ha		81.92							
Description		Good quality business location, with a mix of industrial/distribution and office developments, the largest such business park in the district and one of the largest in the Leicester Conurbation. Major occupiers include Royal Mail, Paramount Knitwear and Charles Church Developments. The Area has critical mass and prominence, being at near capacity. The allocation also includes Osiers Business Park, a small modern office park to the east and the undeveloped Lubbesthorpe Gateway site which sits to the north west, at the entrance to the New Lubbesthorpe SUE. It is separated from surrounding uses by the strategic roads that border it, while higher impact industrial uses are found deeper within the Business Park as well away from housing and the estate's hotel.							
Access Issues		Meridian Business Park and Osiers Business Park fall along the A563 Lubbesthorpe Way Corridor, which gives dual carriageway access to the M1 and M69, as well as the main wester routes into Leicester. Internal estate roads are wide and unobstructed. The Lubbesthorpe Gateway site also falls onto a main road into New Lubbesthorpe.							
Total Number of Units	112	Vacant/Derelict Units			12	Occupancy Rate, percent		89	
Buildings Type, number of units		Office (inc. R and D)	64	Industrial	25	Warehouse	21	Other	2
Buildings Age, number of units		Pre 1945	1	Post 1945	33	Post 1990	57	New	22
Buildings Quality, number of units		Derelict	-	Poor	-	Average	85	Good	28
Total Floorspace, sqm		195,120							

Area Name	Braunstone Town Meridian Business Park (with Osiers Business Park and Lubbesthorpe Gateway), Braunstone Town		
Opportunities for Redevelopment/ expansion	In Meridian Business Park, one unit is under construction on Meridian North Road. On Centurion Way 0.79 ha of land is undeveloped, to the rear of Harrison Carr, HC House, 28c Centurion Way. All other undeveloped land is in use for landscaping and areas of environmental quality, most notably Blue Bell Wood, Meridian East and is assumed undevelopable. Osiers Business Park is fully developed and tightly bound by the Osiers Nature Area. The Lubbesthorpe Gateway site, of 1.70 ha is undeveloped. It is linked to linked to Outline planning consent App. No. 11/0100. This land forms part of the existing Employment Land Supply discussed above.		
Recommendations	Protect in the Local Plan as an employment area for E(g)/B2/B8 (and appropriate ancillary) uses. See main Recommendation One, Section 9.0 for further details.		

Area Name		Everards Meadow and Police HQ, Enderby						
Area Size, ha		13.66 (around 8.70 ha without Everards Meadow)						
Description		Dispersed employment area, on a main road position, includes the Everards Meadow Site in the north which has been redeveloped for leisure and public open space uses. In the south is the large, older, secure facilities for Leicestershire Police and Leicestershire Search and Rescue. The Area is mostly bounded by strategic roads and open space. There is a small area of housing to the south of the Police HQ, but this appears well screened from the secure Police site.						
Access Issues		Both sites have good access onto the B4114 St Johns, and/or the A563 Soar Valley Way, mostly by signal controlled junctions. These roads provide almost immediate access to the M1/M69. Internal roads are modern and unobstructed. The Police HQ is secure.						
Total Number of Units	14	Vacant/Derelict Units			0	Occupancy Rate, percent		100
Buildings Type, number of units	Office (inc. R and D)	9	Industrial	-	Warehouse	2	Other	3
Buildings Age, number of units	Pre 1945	-	Post 1945	11	Post 1990		New	3
Buildings Quality, number of units	Derelict	-	Poor	-	Average	11	Good	3
Total Floorspace, sqm		Everards Meadow is 4,952. The size of the Police HQ is Confidential						
Opportunities for Redevelopment/ expansion		1.99 ha in the east of the Everards Meadow site has Outline Consent for a hotel and offices (App. No. 22/0110). This land forms part of the existing Employment Land Supply discussed above.						
Recommendations		Although Everards Meadow is primarily in leisure and retail uses it retains a substantial consent for offices on the undeveloped land while the Police HQ remains mostly in E(g)(i) office use. Accordingly, it is recommended to protect in the Local Plan as an employment area for E(g)/B2/B8 (and appropriate ancillary) uses. The Council may wish to consider excluding the leisure and retail area. See main Recommendation One, Section 9.0 for further details						

Area Name	Grove Park, Enderby
Area Size, ha	42.06

Area Name		Grove Park, Enderby							
Description		High quality business park situated adjacent to J21 of the M1 motorway. Major occupiers include British Gas, Selfridges, Topps Tiles and Thermo Fisher. Good prominence on multiple major routes into Leicester. Scheme also includes a Marriott Hotel and a pub/restaurant (Grove Farm). Grove Park is bounded by strategic roads on three sides which separate it from nearby uses.							
Access Issues		Area access from Leicester Lane in the south and A563 Lubbesthorpe Way in the East, giving access to the M1 and M69. Both routes appear unconstrained. Access routes through the area are well maintained and clear of obstructions.							
Total Number of Units	42	Vacant/Derelict Units			8	Occupancy Rate,		81	
Buildings Type, number of units		Office (inc. R and D)	36	Industrial	-	Warehouse	4	Other	2
Buildings Age, number of units		Pre 1945	-	Post 1945	-	Post 1990	36	New	6
Buildings Quality, number of units		Derelict	-	Poor	-	Average	-	Good	42
Total Floorspace, sqm		83,106							
Opportunities for Redevelopment/expansion		The 3.64 ha of land, bounded by Barton close in the south, Smith Way in the east, Frances Way in the north and Barnsdale Way in the west, undeveloped as of the 2011 Study, has now been developed for five offices and a pub/restaurant (7,343 sqm of additional office premises). All other undeveloped land within the Area boundary appears in use for landscaping/environmental mitigation or car parking/overflow parking. The allocated employment site 'Land West of B4114, Enderby' is located to the immediate south.							
Recommendations		Protect in the Local Plan as an employment area for E(g)/B2/B8 (and appropriate ancillary) uses. See main Recommendation One, Section 9.0 for further details.							

Area Name		Mill Hill Industrial Estate, Enderby							
Area Size, ha		5.65							
Description		Small, older industrial estate, mostly comprising concrete batching and waste processing plants, but still serving a purpose accommodating bad neighbour uses which may struggle to find affordable space elsewhere. There are high value, lower impact warehouses to the south, which partly adjoin housing.							
Access Issues		The Industrial Estates are located on the B582 Mill Hill Road, part of a larger cluster of employment areas, with access into Enderby and Blaby town. The access road in the north, Granite Close, is narrow and winding, making HGV access difficult.							
Total Number of Units	16	Vacant/Derelict Units			0	Occupancy Rate,		100	
Buildings Type, number of units		Office (inc. R and D)	-	Industrial	6	Warehouse	10	Other	-
Buildings Age, number of units		Pre 1945	-	Post 1945	15	Post 1990	-	New	1
Buildings Quality, number of units		Derelict	-	Poor	10	Average	6	Good	-
Total Floorspace, sqm		10,705							
Opportunities for Redevelopment/expansion		There are some large open storage sites in the Area which might provide redevelopment sites in the long term but appear in full use at present. Expansion elsewhere would require the loss of surrounding woodland and incursion into the countryside.							

Area Name	Mill Hill Industrial Estate, Enderby	
Recommendations	Protect in the Local Plan as an employment area for E/B2/B8 (and appropriate ancillary) uses. See main Recommendation One, Section 9.0 for further details.	

Area Name	Next, Mill Hill, Enderby	
Area Size, ha	10.36	
Description	Next headquarter offices. Good quality buildings, which have seen some investment and new development over the last decade. Self-contained site with high prominence on the B582. The Area mostly adjoins open countryside, plus one farm to the north and the M69 to the south.	
Access Issues	B582 provides access to motorway network via J21 of the M1. The site is secure, with no constraints on access.	
Total Number of Units	5	Vacant/Derelict Units 0 Occupancy Rate, percent 100
Buildings Type, number of units	Office (inc. R and D) 5	Industrial - Warehouse - Other -
Buildings Age, number of units	Pre 1945 -	Post 1945 - Post 1990 4 New 1
Buildings Quality, number of units	Derelict -	Poor - Average - Good 5
Total Floorspace, sqm	34,329	
Opportunities for Redevelopment/expansion	Around half the site is car parking, plus a small area of container storage, which might support some intensification of the existing use. In the short term, however, the parking is well used.	
Recommendations	Protect in the Local Plan as an employment area for E(g)/B2/B8 (and appropriate ancillary) uses. See main Recommendation One, Section 9.0 for further details.	

Area Name	Warren Business Park, Enderby	
Area Size, ha	17.26	
Description	Large industrial area with units from 1960s onwards. There is also a variety of businesses in the area utilising varying types of space, including open storage and trade businesses, along with modern manufacturing and offices. The number and range of businesses provides this area with high critical mass. Prominence is high, with frontage on to the M69. There is some housing on the Mill Hill Road frontage, but heavy industrial uses are well screened by trees.	
Access Issues	The Industrial Estate is located on the B582 Mill Hill Road, part of a larger cluster of employment areas, with access into Enderby and Blaby town. The access roads are wide but constrained by on street parking and poorly surfaced in places.	
Total Number of Units	64	Vacant/Derelict Units 2 Occupancy Rate, percent 97
Buildings Type, number of units	Office (inc. R and D) 29	Industrial 33 Warehouse 1 Other 1
Buildings Age, number of units	Pre 1945 -	Post 1945 21 Post 1990 43 New -
Buildings Quality, number of units	Derelict -	Poor - Average 52 Good 12
Total Floorspace, sqm	11,018	

Area Name		Warren Business Park, Enderby	
Opportunities for expansion	Redevelopment/	There are some large open storage sites in the Area which might provide redevelopment sites in the long term but appear in full use at present. Expansion elsewhere would require the loss of surrounding woodland and incursion into the countryside. Some expansion north, towards the M69 would have lower impacts but would still require the loss of areas of woodland which bound the Area, to the north.	
Recommendations		Protect in the Local Plan as an employment area for E/B2/B8 (and appropriate ancillary) uses. See main Recommendation One, Section 9.0 for further details.	

Area Name		County Hall, Glenfield	
Area Size, ha		16.07	
Description		Primarily offices for Leicestershire County Council but also provides space for several other public sector organisations including Leicestershire Fire and Rescue Services, East Leicestershire and Rutland Clinical Commissioning Group and Registrars' Office. Part of a wider complex of public facilities with the adjoining hospital. There is some housing to the north west, but mostly the use is well screened by surrounding greenspace.	
Access Issues		The Area is accessed via a long access road from a roundabout on the A50. The access appears unconstrained but may struggle with capacity at peak times.	
Total Number of Units	6	Vacant/Derelict Units	0
Occupancy Rate, percent		100	
Buildings Type, number of units	Office (inc. R and D) 6	Industrial	-
Warehouse		-	
Other		-	
Buildings Age, number of units	Pre 1945 -	Post 1945	6
Post 1990		-	
New		-	
Buildings Quality, number of units	Derelict -	Poor	-
Average		6	
Good		-	
Total Floorspace, sqm		32,644	
Opportunities for expansion	Redevelopment/	Space within the main County Hall buildings has been made available to other public sector organisations and other space may be release in the future. In terms of development land, greenfield sites in the north and west are in use as sports pitches. Other undeveloped land appears in full use for car parking.	
Recommendations		Protect in the Local Plan as an employment area for E/B2/B8 (and appropriate ancillary) uses. See main Recommendation One, Section 9.0 for further details.	

Area Name		Mill Lane Industrial Estate, Glenfield	
Area Size, ha		5.64	
Description		Linear row of six large, reasonable quality large units, mostly in use for local scale B8 logistics use. The Area is located north of the Glenfield settlement area, extending into the countryside. It is bounded by greenfield land, on all sides, with public open space to the south. The development of Optimus Point to the south mean that it now links to a wider area of employment, than was true previously.	
Access Issues		The estate has a very wide access road with proximity to the M1 via J21A, and the A46.	
Total Number of Units	7	Vacant/Derelict Units	1
Occupancy Rate, percent		86	
Buildings Type, number of units	Office (inc. R and D) 1	Industrial	-
Warehouse		6	
Other		-	
Buildings Age, number of units	Pre 1945 -	Post 1945	5
Post 1990		2	
New		-	

Area Name		Mill Lane Industrial Estate, Glenfield							
Buildings Quality, number of units	Derelict	-	Poor	-	Average	7	Good	-	
Total Floorspace, sqm		62,615							
Opportunities for Redevelopment/ expansion		The Employment Area is fully developed; further expansion would not be possible without incursions into the surrounding countryside.							
Recommendations		Protect in the Local Plan as an employment area for E/B2/B8 (and appropriate ancillary) uses. See main Recommendation One, Section 9.0 for further details.							

Area Name		Optimus Point, Glenfield							
Area Size, ha		40.84							
Description		Strategic logistics park, the largest such park in the district. A recent development of modern, mostly B8 units, home to a range of major employers including DPD, Godis, Boden and Co and Mattel. Optimus has strong prominence at the A46/M1 Junction. A low-density development, it is separated from nearby housing by large areas of open land although the large warehouses will still be visible from nearby homes.							
Access Issues		The Area benefits from recently developed, expanded access roads which can support the HGV traffic generated and with immediate access to the strategic road network.							
Total Number of Units	10	Vacant/Derelict Units			1	Occupancy Rate, percent		90	
Buildings Type, number of units	Office (inc. R and D)	-	Industrial	1	Warehouse	9	Other	-	
Buildings Age, number of units	Pre 1945	-	Post 1945	-	Post 1990	-	New	10	
Buildings Quality, number of units	Derelict	-	Poor	-	Average	-	Good	10	
Total Floorspace, sqm		75,445							
Opportunities for Redevelopment/ expansion		Development is nearing completion on the last remaining plot, north east of Optimus Way. This land forms part of the existing Employment Land Supply discussed above. Elsewhere, undeveloped land is in use for landscaping and environmental mitigation. Further large-scale expansion is prevented by the surrounding road network, housing and a golf course.							
Recommendations		Protect in the Local Plan as an employment area for E(g)/B2/B8 (and appropriate ancillary) uses. See main Recommendation One, Section 9.0 for further details.							

Area Name		Oak Spinney Park and Ratby Lane, Kirby Muxloe							
Area Size, ha		11.64							
Description		The Area forms an extension to Braunstone Frith Industrial Estate, (in Leicester). The northern section is occupied by three industrial and one retail unit. The main occupier is Saladworks in a large, modern industrial facility. The south comprises a new build development of eight terraced office units, marketed as Le3. The Area is well screened from adjoining uses by trees and separated from housing to the south, by the railway line.							
Access Issues		This area has a high level of prominence to the M1 and Ratby Lane and is close to J21a of the M1, as well as the wider Braunstone Frith Industrial Estate. Within the area, Saladworks has a secure site while the northern two units have independent access off Ratby Lane that appears unconstrained.							
Total Number of Units	12	Vacant/Derelict Units			3	Occupancy Rate, percent		75	

Area Name		Oak Spinney Park and Ratby Lane, Kirby Muxloe						
Buildings Type, number of units	Office (inc. R and D)	8	Industrial	3	Warehouse	-	Other	1
Buildings Age, number of units	Pre 1945	-	Post 1945	-	Post 1990	4	New	8
Buildings Quality, number of units	Derelict	-	Poor	-	Average	1	Good	11
Total Floorspace, sqm		14,446						
Opportunities for Redevelopment/ expansion		The main expansion plot here comprises Site 5: Airmans Rest Business Park, Ratby Lane, Kirby Muxloe (0.52 ha) and is discussed above in relation to the employment land supply.						
Recommendations		Protect in the Local Plan as an employment area for E(g)/B2/B8 (and appropriate ancillary) uses. See main Recommendation One, Section 9.0 for further details.						

Area Name		Lubbesthorpe Strategic Employment Site, Lubbesthorpe						
Area Size, ha		27.54						
Description		Small logistics park, with two modern strategic scale units completed at this time and further development land in the north. A greenfield site, it is mostly bounded by countryside and farm buildings, with the M1 to the east. Marketed as Leicester Commercial Park by developer Goodman.						
Access Issues		The Strategic Employment Site benefits from a purpose-built estate road, Dorsey Way, and junction with Leicester Lane. Leicester Lane, in turn, links to the A563 and the M1/M69.						
Total Number of Units	2	Vacant/Derelict Units		0	Occupancy Rate, percent		100	
Buildings Type, number of units	Office (inc. R and D)	-	Industrial	-	Warehouse	2	Other	-
Buildings Age, number of units	Pre 1945	-	Post 1945	-	Post 1990	-	New	2
Buildings Quality, number of units	Derelict	-	Poor	-	Average	-	Good	2
Total Floorspace, sqm		53,023						
Opportunities for Redevelopment/ expansion		5.52 ha of greenfield agricultural land remains undeveloped, in the north. This land forms part of the existing Employment Land Supply discussed above.						
Recommendations		Protect in the Local Plan as an employment area for E(g)/B2/B8 (and appropriate ancillary) uses. See main Recommendation One, Section 9.0 for further details.						

Area Name		Carlton Park, Narborough						
Area Size, ha		24.03						
Description		High quality, low density self-contained office park, dominated by Santander and including data centres/document stores for that business. Also provides regional and national HQ offices for businesses including Watches of Switzerland and Honeywell, as well as a gym and nursery, in an open business park setting. There are medical facilities to the immediate north west, otherwise Carlton Park is separated from surrounding uses by large areas of greenspace. Also, its uses are office based and likely to have limited environmental impact on the surrounding area.						
Access Issues		The Area benefits from an extensive access road network off the B4114 King Edward Avenue with considerable capacity to support any traffic generated.						
Total Number of Units	9	Vacant/Derelict Units		0	Occupancy Rate, percent		100	

Area Name		Carlton Park, Narborough							
Buildings Type, number of units	Office (inc. R and D)	7	Industrial	-	Warehouse	-	Other	2	
Buildings Age, number of units	Pre 1945	-	Post 1945	-	Post 1990	6	New	3	
Buildings Quality, number of units	Derelict	-	Poor	-	Average	-	Good	9	
Total Floorspace, sqm		31,327 (N.B. The size details of some secure Santander facilities are not disclosed)							
Opportunities for Redevelopment/expansion		One undeveloped plot remains within the Area boundary, 0.67 ha in the west, north of the western Santander Data Centre and the Busy Bees Nursery. This land is closer to the housing of Forest Road however, and links to a smaller office for Santander (Croft House). The need to keep a secure perimeter around the Data Centre may also discourage its development.							
Recommendations		Protect in the Local Plan as an employment area for E(g)/B2/B8 (and appropriate ancillary) uses. See main Recommendation One, Section 9.0 for further details.							

Area Name		Coventry Road Industrial Estate, Narborough							
Area Size, ha		10.08							
Description		Coventry Road Industrial Estate is made up of relatively modern industrial units. There are various sized units with smaller units on the Oaks Industrial Estate and larger units opposite, with both areas forming the designation of Coventry Road Industrial Estate. The combined Employment Area has prominence to Coventry Road, is self-contained and has a critical mass, due to its size. The Area is tightly bound by housing to the north, east and south east which may limit the scale and nature of what can be accommodated here, but this does not appear to have inhibited business activity here, to date.							
Access Issues		The Area is prominently located on the B4114 Coventry Road into Narborough. There are no major constraints to access, although pulling off and on the side roads, from Carlton Road, may be difficult at peak times.							
Total Number of Units	37	Vacant/Derelict Units			0	Occupancy Rate, percent		100	
Buildings Type, number of units	Office (inc. R and D)	-	Industrial	26	Warehouse	11	Other	-	
Buildings Age, number of units	Pre 1945	-	Post 1945	31	Post 1990	6	New	-	
Buildings Quality, number of units	Derelict	-	Poor	-	Average	32	Good	5	
Total Floorspace, sqm		42,092							
Opportunities for Redevelopment/expansion		The Area is fully developed and tightly bounded by housing, a farm, railway line and the River Soar.							
Recommendations		Protect in the Local Plan as an employment area for E(g)/B2/B8 (and appropriate ancillary) uses. See main Recommendation One, Section 9.0 for further details.							

Area Name		Foxbank Industrial Estate, Station Road, Stoney Stanton							
Area Size, ha		8.58							

Area Name		Foxbank Industrial Estate, Station Road, Stoney Stanton							
Description		Quite a substantial mixed, moderate quality area in small rural village, dominated by transport and construction firms. Low prominence, in a mostly residential area although most of the estate is well screened by trees. ESS1 Foxbank Industrial Estate, Stoney Stanton is identified under Policy FV15: 'Employment Areas' of the Fosse Villages Neighbourhood Plan: Update (2018-2029) to be safeguarded for E(g)/B-Class development.							
Access Issues		The Area is accessed via mostly residential streets while the access road is narrow in places and would struggle to support a significant increase in traffic.							
Total Number of Units	9	Vacant/Derelict Units			0	Occupancy Rate, percent		100	
Buildings Type, number of units		Office (inc. R and D)	1	Industrial	6	Warehouse	2	Other	-
Buildings Age, number of units		Pre 1945	-	Post 1945	5	Post 1990	4	New	-
Buildings Quality, number of units		Derelict	-	Poor	-	Average	9	Good	-
Total Floorspace, sqm		31,913							
Opportunities for Redevelopment/ expansion		The Area is fully developed; further expansion would necessitate the loss of some of the woodland which bounds the Area.							
Recommendations		Protect in the Local Plan as an employment area for E/B2/B8 (and appropriate ancillary) uses. See main Recommendation One, Section 9.0 for further details.							

Area Name		Cambridge Road Industrial Estates, Whetstone							
Area Size, ha		18.26							
Description		Large estate of modern, mostly mid-sized industrial warehouse units, on a main road location, on the edge of Whetstone. Part of a larger industrial area, with the Whittle Estate to the north. It comes close to housing in places but is usually separated by a main road or by trees, except around Dog and Gun Lane where housing and industrial units are more closely linked.							
Access Issues		Access is from Cambridge Road which links to the A426 in the north, through the main settlements of Blaby District. Access roads are wide and unconstrained.							
Total Number of Units	25	Vacant/Derelict Units			0	Occupancy Rate, percent		100	
Buildings Type, number of units		Office (inc. R and D)	-	Industrial	20	Warehouse	5	Other	-
Buildings Age, number of units		Pre 1945	-	Post 1945	9	Post 1990	11	New	-
Buildings Quality, number of units		Derelict	-	Poor	-	Average	9	Good	-
Total Floorspace, sqm		51,848							
Opportunities for Redevelopment/ expansion		The Estate is in full use and tightly bound by other uses.							
Recommendations		Protect in the Local Plan as an employment area for E(g)/B2/B8 (and appropriate ancillary) uses. See main Recommendation One, Section 9.0 for further details.							

Area Name		Enderby Road Industrial Estates and Grange Business Park, Whetstone							
Area Size, ha		7.29							

Area Name		Enderby Road Industrial Estates and Grange Business Park, Whetstone							
Description		Enderby Road Industrial Estate is a local industrial estate, reasonably modern, well maintained. Comprising mostly 1970s/1980s terraced units and fully occupied. Although not particularly prominent, it is sustainable and provides important function. It includes a modern depot for Blaby District Council. The Industrial Estate is adjacent to a water treatment facility which may slightly reduce its attractiveness to some occupiers, but the Estate continues to have a role accommodating bad neighbour uses which may struggle to find affordable space elsewhere. Located south of the railway line, Grange Business Park is a modern office park. It adjoins housing to the east but is likely to have a limited impact on residential areas.							
Access Issues		Both locations have unconstrained access off the B582 Enderby Road.							
Total Number of Units	43	Vacant/Derelict Units			5	Occupancy Rate, percent		88	
Buildings Type, number of units		Office (inc. R and D)	20	Industrial	19	Warehouse	3	Other	1
Buildings Age, number of units		Pre 1945	-	Post 1945	-	Post 1990	40	New	3
Buildings Quality, number of units		Derelict	-	Poor	-	Average	40	Good	3
Total Floorspace, sqm		15,528							
Opportunities for Redevelopment/expansion		Uses north of Enderby Road Industrial Estate include a Severn Trent water Treatment works and a Maxi Readymix Concrete depot. In the long term these might provide some brownfield regeneration opportunities but, at present, both appear to be in use. In practice, land contamination would also likely prove a significant barrier to the deliverability and viability of any E(g)/B-Class scheme proposed here.							
Recommendations		Protect in the Local Plan as an employment area for E/B2/B8 (and appropriate ancillary) uses. See main Recommendation One, Section 9.0 for further details.							

Area Name		The Whittle Estate, Whetstone							
Area Size, ha		16.87 (Reducing to 14.36 excluding land now developed for housing)							
Description		Secure, multi-let industrial and office scheme owned by Canmoor. It mostly comprises high quality, mid-large sized industrial units including some advanced manufacturing uses, such as Cavendish Nuclear and Babcock. The area is self-contained, and was separate from the surrounding residential area but a new residential development in the north west (The Villers) brings housing much closer to the scheme, potentially leading to noise and visual impacts							
Access Issues		Access is from Cambridge Road which links to the A426 in the north, through the main settlements of Blaby District. Access roads are wide and unconstrained. The site is secure.							
Total Number of Units	16	Vacant/Derelict Units			5	Occupancy Rate, percent		69	
Buildings Type, number of units		Office (inc. R and D)	1	Industrial	13	Warehouse	2	Other	-
Buildings Age, number of units		Pre 1945	-	Post 1945	8	Post 1990	3	New	5
Buildings Quality, number of units		Derelict	-	Poor	-	Average	8	Good	8
Total Floorspace, sqm		13,255							
Opportunities for Redevelopment/expansion		The site is densely developed and tightly bound by other uses. Previously vacant land has now been developed for housing.							

Area Name	The Whittle Estate, Whetstone
Recommendations	Protect in the Local Plan as an employment area for E(g)/B2/B8 (and appropriate ancillary) uses. See main Recommendation One, Section 9.0 for further details. Exclude from any allocation, land now lost to housing.

Area Assessment Proformas – Additional Areas

Area Name	Winston Avenue, Croft						
Area Size, ha	3.07						
Description	<p>Winston Avenue is a small, self-contained industrial estate with relatively modern units. It is a key source of premises for Croft and the rural west of Blaby District. The estate adjoins housing and recreation areas to the west and south, which directly overlook the business units, likely leading to some issues of noise and other impacts from the main industrial occupiers.</p> <p>EC1 Winston Avenue, Croft is identified under Policy FV15: 'Employment Areas' of the Fosse Villages Neighbourhood Plan: Update (2018-2029) to be safeguarded for E(g)/B-Class development.</p>						
Access Issues	It is located midway between J2 of the M69 and J21 of the M1 with the B4114 providing reasonable access to both, however that access is through Croft village centre. Winston Avenue is shared between housing and residential uses and is poorly suited for HGV access. Any intensification of uses here would likely lead to significant transport issues.						
Total Number of Units	8	Vacant/Derelict Units		0	Occupancy Rate,		100
Buildings Type, number of units	Office (inc. R and D)	-	Industrial	8	Warehouse	-	Other -
Buildings Age, number of units	Pre 1945	-	Post 1945	-	Post 1990	-	New -
Buildings Quality, number of units	Derelict	-	Poor	-	Average	8	Good -
Total Floorspace, sqm	7,519						
Opportunities for Redevelopment/expansion	The area is fully developed and tightly bound by housing, railway line and public open space.						
Recommendations	Protect in the Local Plan as an employment area for E/B2/B8 (and appropriate ancillary) uses. See main Recommendation One, Section 9.0 for further details.						

Area Name	Croft Quarry Offices, Huncote Road, Croft						
Area Size, ha	0.83						
Description	Three office buildings, one historic two modern (plus a small storage unit) of moderate quality in a backland position surrounding a church, on the edge of Croft. The offices fall into a Conservation area and adjoin various historic buildings including St Michael's and All Angels Church and the Heathcote Arms, as well as areas of greenspace linked to Croft Quarry.						
Access Issues	Access to the Area is via the narrow rural Huncote Road, with immediate site access routes becoming even narrower. As uses here are office based, likely with minimal HGV activity this is unlikely to be a significant issue.						
Total Number of Units	4	Vacant/Derelict Units		1	Occupancy Rate,		75
Buildings Type, number of units	Office (inc. R and D)	3	Industrial	-	Warehouse	1	Other -
Buildings Age, number of units	Pre 1945	2	Post 1945		Post 1990	2	New -
Buildings Quality, number of units	Derelict	-	Poor		Average		Good 4

Area Name	Croft Quarry Offices, Huncote Road, Croft		
Total Floorspace, sqm	1,044		
Opportunities for Redevelopment/expansion	The Alltruck office in the west includes a large garden which could support some infill development. However, the protected historic nature of the area and access constraints make it unlikely that growth could be supported here.		
Recommendations	Three local offices of moderate quality, but with constrained access and partly in a backland position. The offices are occupied and in use but overall would not be a priority for protection in the Local Plan compared to larger local Employment Areas such as Riverside Court.		

Area Name	Riverside Court, Croft						
Area Size, ha	0.39						
Description	Small scheme of eight modern terraced offices, prominently located on the main road north of Croft. The Area is bounded by greenfield land to the north and the railway line to the south and is thus disconnected from other uses. EC2 Riverside Court, Croft is identified under Policy FV15: 'Employment Areas' of the Fosse Villages Neighbourhood Plan: Update (2018-2029) to be safeguarded for E(g)/B-Class development.						
Access Issues	Riverside Cort has good access in the rural context, being based off Station Road and with new build internal access roads.						
Total Number of Units	8	Vacant/Derelict Units		0	Occupancy Rate,		100
Buildings Type, number of units	Office (inc. R and D)	8	Industrial	-	Warehouse	-	Other -
Buildings Age, number of units	Pre 1945	-	Post 1945	-	Post 1990	-	New 8
Buildings Quality, number of units	Derelict	-	Poor	-	Average	-	Good 8
Total Floorspace, sqm	944						
Opportunities for Redevelopment/expansion	In the long term there could be scope to extend the scheme north and east, into brownfield land presently used for open storage and vehicle parking. Most of this land falls into Flood Zones 2 and 3, however, associated with the adjacent River Soar. This land also appears in use by Croft Quarry and so any expansion would be dependent on when, and if, the quarry chooses to release land. In this regard, it is understood that Aggregate Industries UK has recently submitted plans to restart extraction in the quarry in a 10 plus years timeframe, including moving aggregates via the rail link which is directly adjacent to Riverside Court. Thus, expansion land is unlikely to become available over the next Local Plan period.						
Recommendations	Protect in the Local Plan as an employment area for E/B2/B8 (and appropriate ancillary) uses. See main Recommendation One, Section 9.0 for further details.						

Area Name	Wharf Way, Glen Parva
Area Size, ha	5.23

Area Name		Wharf Way, Glen Parva							
Description		Small, average quality industrial area, to the rear of housing in an edge of settlement area. Since the 2011 Study, the south east of the Area has been redeveloped as Wharf Way Business Park, for industrial units. Some existing properties have also seen investment, significantly improving the quality of the location. Wharf Way is fronted by housing, and some properties back onto industrial space which will place some limits on the scale and nature of the businesses which can operate here. Existing uses include a windows/doors manufacturer and a bed manufacturer, as well as offices and do not appear particularly high impact.							
Access Issues		The Area has some prominence onto the A426. Wharf Way includes some housing, but the road itself as seen some investment and appears adequate for the scale of the area.							
Total Number of Units	20	Vacant/Derelict Units			1	Occupancy Rate, percent		95	
Buildings Type, number of units		Office (inc. R and D)	1	Industrial	17	Warehouse	2	Other	-
Buildings Age, number of units		Pre 1945	1	Post 1945	14	Post 1990	-	New	5
Buildings Quality, number of units		Derelict	-	Poor	-	Average	15	Good	5
Total Floorspace, sqm			18,786						
Opportunities for Redevelopment/expansion		The Area is fully developed and tightly bound by adjoining uses including housing, a canal and public greenspace.							
Recommendations		Protect in the Local Plan as an employment area for E/B2/B8 (and appropriate ancillary) uses. See main Recommendation One, Section 9.0 for further details.							

Area Name		Narborough Wood Park, Desford Road, Enderby							
Area Size, ha		1.07							
Description		Densely developed, rural office scheme comprising multiple rows of good quality offices, a mixture of property conversions and purpose-built units, part of a wider estate which includes some homes and landscaped grounds. Part from homes connected with the estate, the scheme is surrounded by open countryside. The single storey offices will have a limited impact on the surrounding greenspace.							
Access Issues		Narborough Wood Park has a degree of prominence on the B582 Desford Road, with links to the A47 in the north and to Enderby in the south. The Park is some distance from the road, however, accessed by a long single-track estate road and one way system which may prove difficult to navigate at peak times. It would not support extensive HGV traffic, but that is unlikely in this office scheme.							
Total Number of Units	29	Vacant/Derelict Units			1	Occupancy Rate, percent		97	
Buildings Type, number of units		Office (inc. R and D)	29	Industrial	-	Warehouse	-	Other	-
Buildings Age, number of units		Pre 1945	-	Post 1945	-	Post 1990	29	New	-
Buildings Quality, number of units		Derelict	-	Poor	-	Average	-	Good	29
Total Floorspace, sqm			1,936						
Opportunities for Redevelopment/expansion		Existing Area is fully developed; further expansion would require the loss of estate gardens or expansion into open countryside							
Recommendations		Protect in the Local Plan as an employment area for E(g)(i) office uses. See main Recommendation One, Section 9.0 for further details.							

Area Name		Watergate Lane, Braunstone Town							
Area Size, ha		0.80							
Description		Two older units, one occupied by a motor trade company one by a wholesaler, in an otherwise residential area, bounded by housing. This will limit the scale and nature of business operations which can be accommodated here.							
Access Issues		Although close to the A5460 Narborough Road, immediate access is via local residential roads, which are narrow in places and could not support extensive HGV trips.							
Total Number of Units	2	Vacant/Derelict Units			0	Occupancy Rate, percent		100	
Buildings Type, number of units		Office (inc. R and D)	-	Industrial	-	Warehouse	1	Other	1
Buildings Age, number of units		Pre 1945		Post 1945	2	Post 1990		New	
Buildings Quality, number of units		Derelict	-	Poor	-	Average	2	Good	-
Total Floorspace, sqm		4,319							
Opportunities for Redevelopment/expansion		Area is in full use and tightly bound by housing.							
Recommendations		A small area, accommodating two businesses, both in motor trade/wholesale use. The location is isolated from other employment areas and constrained by surrounding housing. For these reasons it is not recommended to be designated as an employment area in the new Local Plan (given its scale and uses) at this stage.							

5.24 The 26 employment areas assessed, comprise 382.28 ha of mostly developed employment land, 370.89 ha in the 20 allocated Areas, 11.39 ha from the other six sites. By far the largest Employment Area is Braunstone Town Meridian Business Park (with Osiers Business Park and Lubbesthorpe Gateway), Braunstone Town (81.92 ha). This is followed by Grove Park, Enderby (42.06 ha) and Optimus Point, Glenfield (40.84 ha). Together these areas comprise 43.1 percent of the total developed land. Only two other areas – Lubbesthorpe Strategic Employment Site, Lubbesthorpe and Carlton Park, Narborough – comprise more than 20 ha of land while the district average for an industrial estate, business park, etc. is 14.70 ha.

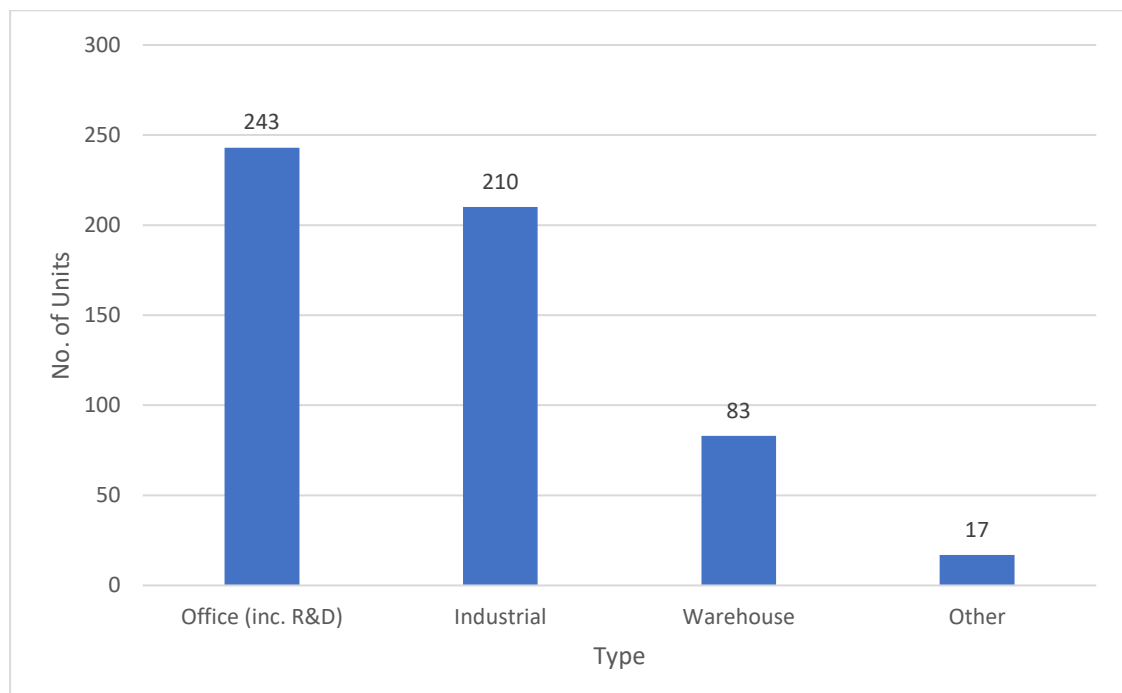
5.25 Analysis of VOA data identifies a supply of 553 properties in these 26 Employment Areas, 482 in just the 20 Allocations. This compares to 533 properties identified in the 2011 Study, although as that Study considered a smaller number of Employment Areas the figures are not directly comparable.

5.26 The 553 properties comprise 826,292 sqm of premises, 791,744 sqm in just the 20 Allocations. Again, Braunstone Town Meridian Business Park (with Osiers Business Park and Lubbesthorpe Gateway), Braunstone Town dominates with 112 properties comprising 195,120 sqm of floorspace. Collectively, it comprises 20.3 percent and 23.6 percent of the respective totals.

5.27 Across the 26 Areas, there was no external evidence of dereliction in any property and, as is noted below, most stock is of average or good quality. On average, the Areas are 93 percent occupied which indicates a high level of local economic activity whilst still allowing some free space for business growth and churn as well as available premises for inward investment. The vacant and marketed properties were considered further in Section 3.0. 14 of the 26 Areas, or 53.8 percent, are fully occupied whilst The Whittle Estate, Whetstone has the lowest occupancy level at 69 percent.

5.28 Figure 14 shows a split of the 553 identified units by type. This shows that 43.9 percent of units in the Areas are offices while 38.0 percent are industrial, and a more modest 15.0 percent are warehouses (although this will include the strategic scale properties of Optimus Point).

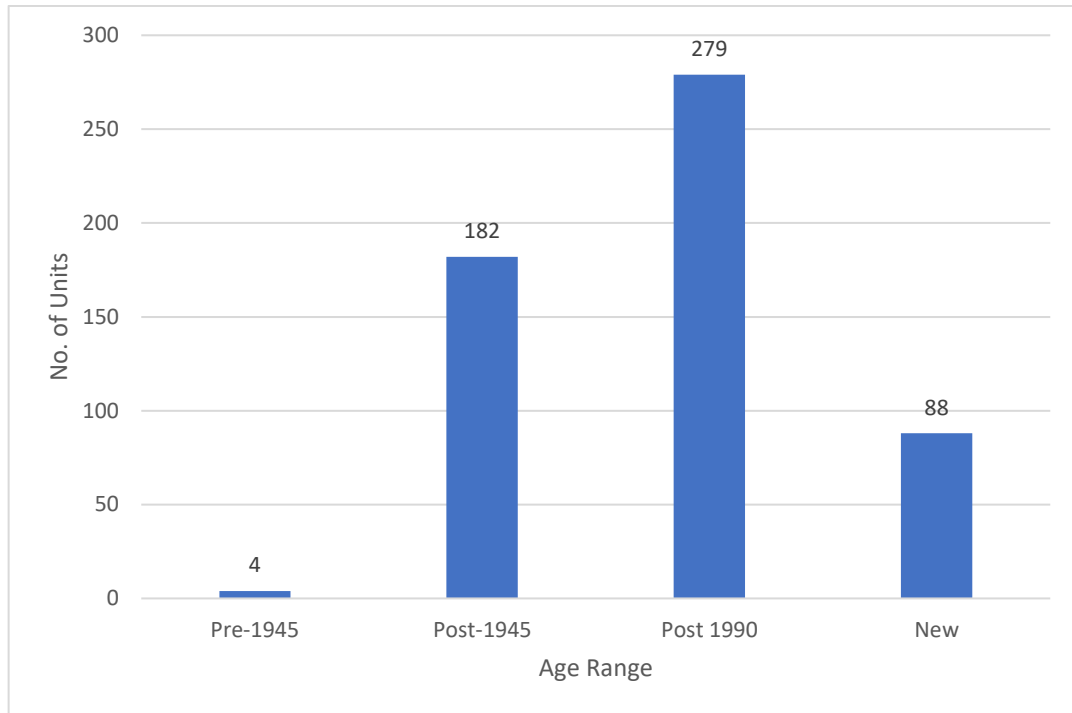
Figure 14 – Blaby District Employment Area Stock – By Property Type



Source: BE Group and VOA, 2024

- 5.29 Only 12 properties fell into 'other', non E(g)/B-Class use categories. This is an increase from the eight units in other uses identified in the 2011 Blaby Employment Land Study Refresh, but not a significant one given the 553 premises reviewed here. It suggests that Blaby District does not have an excessive problem with properties being converted non E(g)/B-Class uses. Also that the 2020 changes to the Use Classes Order do not seem to have led to any significant growth in other uses, within defined industrial estates and business parks at least. Generally, other uses were limited to single properties in nursery or hot food uses, in various Employment Areas.
- 5.30 The 'Other' category will not include properties in trade use, where specialist products are sold direct to consumers from B8 warehouses. Such trade uses did not appear to dominate any Employment Area, other than Watergate Lane, Braunstone Town which is discussed separately below.
- 5.31 As Figure 15 shows, Blaby District has a reasonably modern stock with only four units clearly predating 1945. This is unsurprising as, unlike Leicester or Hinckley and Bosworth, Blaby District almost completely lacks historic mills or similar premises. Around half the stock can be dated to the period 1990-2010 and another third from the period 1945-1990. 88 units have been built since 2010, approximately since the 2011 Study was completed. This is quite a high rate of new development, equating to 15.9 percent of all stock. It reflects significant growth at Rose Business Park, Blaby and Grove Park, Enderby as well as the development of the Lubbethorpe Strategic Employment Site, Lubbethorpe and most significantly Optimus Point, Glenfield.

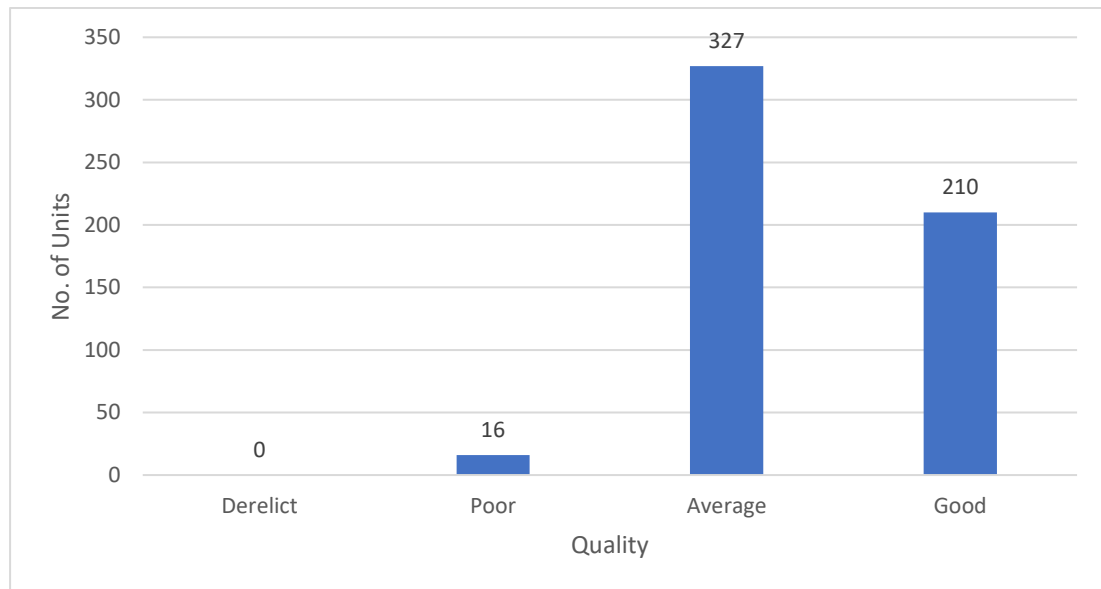
Figure 15 – Blaby District Employment Area Stock – By Age Range



Source: BE Group, 2024

5.32 In terms of quality, as Figure 16 shows, all but 16 units were classed as average or good quality. Blaby District has only a few poor-quality units and, as mentioned nothing which is obviously derelict. Thus, Blaby District has no significant issue with older, low grade and/or extensively vacant premises, while 38.0 percent of the stock is classified as good quality. This includes the new build premises mentioned above but more generally large parts of Grove Park, Enderby; Braunstone Town Meridian Business Park (with Osiers Business Park and Lubbethorpe Gateway), Braunstone Town and Optimus Point, Glenfield. These are high grade schemes which offer a diverse range of premises and can be marketed to regional and national investors.

Figure 16 – Blaby District Employment Area Stock – By Quality Range



Source: BE Group, 2024

5.33 As a result of the generally high quality of most of the District’s E(g)/B-Class stock there are few opportunities for regeneration, refurbishment or infill development. Excluding sites already highlighted at the beginning of this section as part of the undeveloped employment land supply, only the following could provide additional opportunities for brownfield development:

- Rose Business Park, Blaby – Land south of Rose Way, fronting Lutterworth Road (in front of the Daisy Chain Nursery) (0.37 ha). This falls within two Call for Sites submissions – EBLA003 and EBLA004: Land west of the A426, Blaby, where this and adjoining land was proposed for mixed employment uses.
- Braunstone Town Meridian Business Park (with Osiers Business Park and Lubbesthorpe Gateway), Braunstone Town – In Meridian Business Park, one unit is under construction on Meridian North Road. On Centurion Way 0.79 ha of land is undeveloped, to the rear of Harrison Carr, HC House, 28c Centurion Way
- Carlton Park, Narborough – One undeveloped plot remains within the Area boundary, 0.67 ha in the west, north of the western Santander Data Centre and the Busy Bees Nursery. This land is closer to the housing of Forest Road however, and links to a smaller office for Santander (Croft House). The need to keep a secure perimeter around the Data Centre may also discourage its development.

- 5.34 Overall, the 20 Allocated Employment Areas are well used and offer reasonable quality premises. It is recommended that all but one should continue to be protected in the next Local Plan. The exception is Hazel Drive, Braunstone Town which comprises two properties in motor trade, rather than traditional E(g)/B-Class use.
- 5.35 Of the six additional Employment Areas, four are active and well used local industrial and office schemes which should also be protected in the Local Plan. The exceptions are Watergate Lane, Braunstone Town, where again premises is in trade/wholesale rather than traditional E(g)/B-Class use. Also Croft Quarry Offices, Huncote Road, Croft which, while 75 percent occupied, only comprises four properties in a mostly backland position with constrained access.

Summary

- 5.36 The committed employment land supply for Blaby District was 48.34 ha, comprising recorded planning consents and Local Plan allocations. However, this supply includes areas of land that are unlikely to be developed in their present form or are already developed/under development (for highly specialist uses in one case). Removing such land reduces the net land supply to 44.03 ha, in seven sites.
- 5.37 Around three quarters of the supply comprises the 33.30 ha, allocated Site 1: Land West of St Johns, Enderby. This large site now benefits from Outline consent for a major scheme and is controlled by an experienced owner and land promoter. The ongoing good demand for larger B2/B8 uses along the M1 Corridor gives it a strong chance of delivery, subject to securing Reserved Matters planning consent(s). It is also noted that the Report 'Warehousing and Logistics in Leicester and Leicestershire: Managing growth and change, 2022' identifies the site at Land West of St Johns as a commitment in terms of strategic B8. If the District Council considers that the Land West of St Johns site forms part of the 'strategic' supply required to meet wider B8 needs (thereby removing 33.3ha from the potential 'local' supply), the emerging Local Plan will need to make provision for additional employment land to meet the residual local requirement identified by this study (as discussed in Section 6.0).
- 5.38 Another 10.73 ha remains available elsewhere from other consents, which show some evidence of deliverability.

- 5.39 1.99 ha of this supply, comprising Site 6: Land at Everards Meadows, Cooper Way, Enderby, is consented for offices only. The supply specifically for industrial and warehouse uses is thus 42.04 ha in six sites, assuming Site 1: Land West of St Johns, Enderby remains in the local supply.
- 5.40 The application for a Development Consent Order (DCO) for the 850,000 sqm Hinckley National Rail Freight Interchange has been refused by the Secretary of State for Transport in March 2025, it is thus not considered as part of either the local or strategic employment land supply.
- 5.41 A review of 26 Employment Areas in Blaby, 20 allocated in the Core Strategy DPD and six identified through other research, indicates that most are established office and industrial areas, of good quality, with few voids or premises which appear surplus to modern business requirements. Conversely, this means that there are few opportunities for regeneration and growth, at least within the defined area boundaries. All but 17 of the 553 properties were in E(g)/B-Class use, suggesting that the district has not been losing much stock to alternative uses, even given increased Permitted Development Rights since 2020.
- 5.42 Overall, the 20 Allocated Employment Areas are well used and offer reasonable quality premises. All but one should continue to be protected in the next Local Plan. The exception is Hazel Drive, Braunstone Town which comprises two properties in motor trade, rather than traditional E(g)/B-Class use. Additionally, there will need to be a reduction in the size of The Whittle Estate, Whetstone, to allow for the loss of land in the north west to housing.
- 5.43 Of the six additional Employment Areas, four are active and well used local industrial and office schemes which should also be protected in the Local Plan. The exceptions are Watergate Lane, Braunstone Town, where again premises is in trade/wholesale rather than traditional E(g)/B-Class use. Also Croft Quarry Offices, Huncote Road, Croft which, while 75 percent occupied, only comprises four properties in a mostly backland position with constrained access.

6.0 OBJECTIVELY ASSESSED NEEDS

Introduction

- 6.1 In this Section we consider the Objectively Assessed Need (OAN) for employment land and floorspace over the periods from 2024 to 2041 and 2046 for Blaby District. Paragraph 27 of the Planning Practice Guidance “Housing and Economic Needs Assessment” notes that “Strategic policy making authorities will need to develop an idea of future needs based on a range of data which is current and robust, such as:
- Sectoral and employment forecasts and projections which take account of likely changes in skills needed (labour demand)
 - Demographically derived assessments of current and future local labour supply (labour supply techniques)
 - Analysis based on the past take-up of employment land and property and/or future property market requirements...”
- 6.2 Reflecting that Guidance, the approach that has been adopted in this study is to consider the appropriateness of two models, the Labour Demand and Past Take Up, to determine the OAN for Blaby District. Trends and forecasts must also reflect market signals and therefore they are considered in the context of the market overview undertaken as part of this study.
- 6.3 **Labour Demand** relies on the econometric forecasts which use a model that projects the likely jobs growth in different industry sectors. The jobs figures are then translated to land using a formula based on a jobs to floorspace density which, in turn, can be translated into the projected land need. This scenario uses as its base the economic forecasts produced by Cambridge Econometrics (September 2024). These forecasts accounted for macro-economic conditions as understood at the time and the projected long-term impacts of issues like the Covid-19 Pandemic and inflation on the local economy. The use of Cambridge Econometrics is also consistent with LEP area studies, specifically the Leicester and Leicestershire HENA studies completed since 2017.

- 6.4 The above is a 'policy off' forecast, which is the outcome which, given national trends in the economy, might be expected to occur locally anyway without any intervention from public policy and programmes. Blaby does not include any large-scale public policy initiatives which will impact on jobs growth (Labour Demand) moving forward and could support additional 'policy on' Labour Demand modelling.
- 6.5 The econometric forecasts are useful in that they analyse each industry sector and, in conjunction with other market data, the forecasts can identify where sectors may be growing or shrinking which in turn can inform land and property needs. However, they also have several limitations. They are based on national and regional trends with some local adjustments for some industry sectors, which means, at a local level, economic activity is not always accurately represented. Also, merely translating jobs to land needs will not always reflect local property trends or changing working practices, which may alter jobs densities.
- 6.6 **Labour Supply**, also referenced in the PPG Note, is a variation on Labour Demand that uses the same method of forecasting as the Employment based method but takes forecast changes in the working population, labour supply, rather than jobs – labour demand. However, it ideally requires, as a base, the up to date and bespoke forecasts of working age population change which will specifically inform agreed projections of housing need in Blaby, to allow a link to be made between housing and employment land requirements.
- 6.7 Such bespoke population forecasts are not available for Blaby District, at this time. Accordingly, the Labour Supply Model is not used in this Study. This is not a particular concern since Labour Supply modelling only identifies employment land needs from the extra working age population, identified to 2046. It does not analyse change across the wider economy to provide complete projections of OAN.

6.8 **Historic Land Take-Up** reviews the actual take-up of employment land in the local authority area over a period. The method is not wholly reliable as there will be peaks and troughs and different time periods taken can also result in different outcomes. For example, a period of sustained growth may show a high average take-up whereas looking over a recessionary period could well reflect low or even nil take-up. Additionally, the monitoring of employment land take up has become more challenging for Councils since 2020, given changes in Permitted Development Rights and the Use Classes Order, which allow more changes of use within, and from, the E(g)/B-Class uses without the need to seek planning consent. Councils are also under pressure to prioritise the monitoring of housing take up, a factor given more importance in national policy and local authority resourcing, over employment land take up.

6.9 The methods, and calculations, are considered in turn.

Model One Labour Demand – Baseline Forecast

6.10 Work has been completed using forecasts provided by Cambridge Econometrics. Created in September 2024, this forecast accounts for the projected impacts of macro-economic trends such as the Covid-19 Pandemic of 2020-2022, Brexit, inflation and the risks of a recession, as they were understood in autumn 2024.

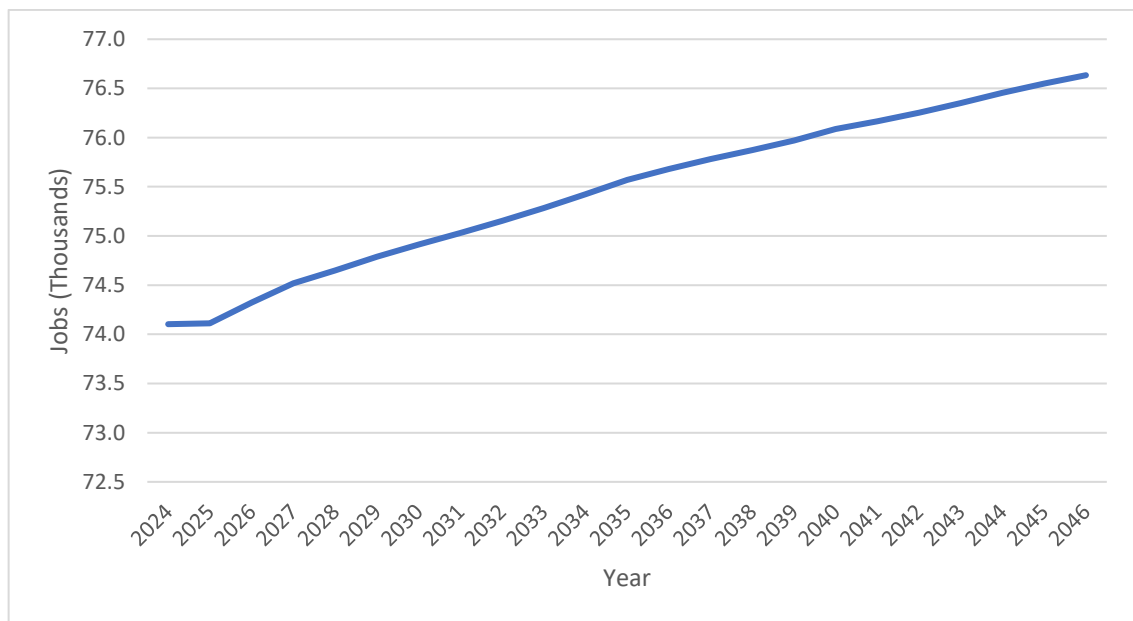
6.11 Cambridge Econometrics forecast modelling was chosen, over other forecast models, for consistency with the Leicester and Leicestershire HENA (2022) and with Employment Land Studies completed in neighbouring districts, which also used Cambridge forecasting. The baseline scenario in the Cambridge forecast projects the following growth, in Blaby District:

- 2024-2041: 2,062 extra jobs
- 2024-2046: 2,531 extra jobs

6.12 As Figure 17 shows, that growth is projected to be relatively steady through the Local Plan periods, with a gain of 100-200 jobs every year. The forecast does not assume there will be a significant recession, at least one that impacts on jobs growth, in the next few years. As will be discussed below, that growth is driven by an expanding Construction sector, as well as growth in Government services and logistics.

6.13 The gain of 2,531 jobs to 2046 is modest compared to 2021-based projections in the HENA 2022 which, for example, suggests Blaby District will gain 6,500 jobs over 2020-2041, on a Baseline Scenario, or 8,800 jobs over 2020-2050. The exact reason for this difference is unclear but clearly this latest (2024) forecast is more cautious on growth following the Covid-19 Pandemic, more recent periods inflation and ongoing global economic uncertainties. Certainly the HENA forecasts seem to have projected a stronger economic recovery from the 2020/2021 Covid-19 Pandemic, and associated lockdowns, than occurred.

Figure 17 – Employment Estimates and Forecasts for Blaby



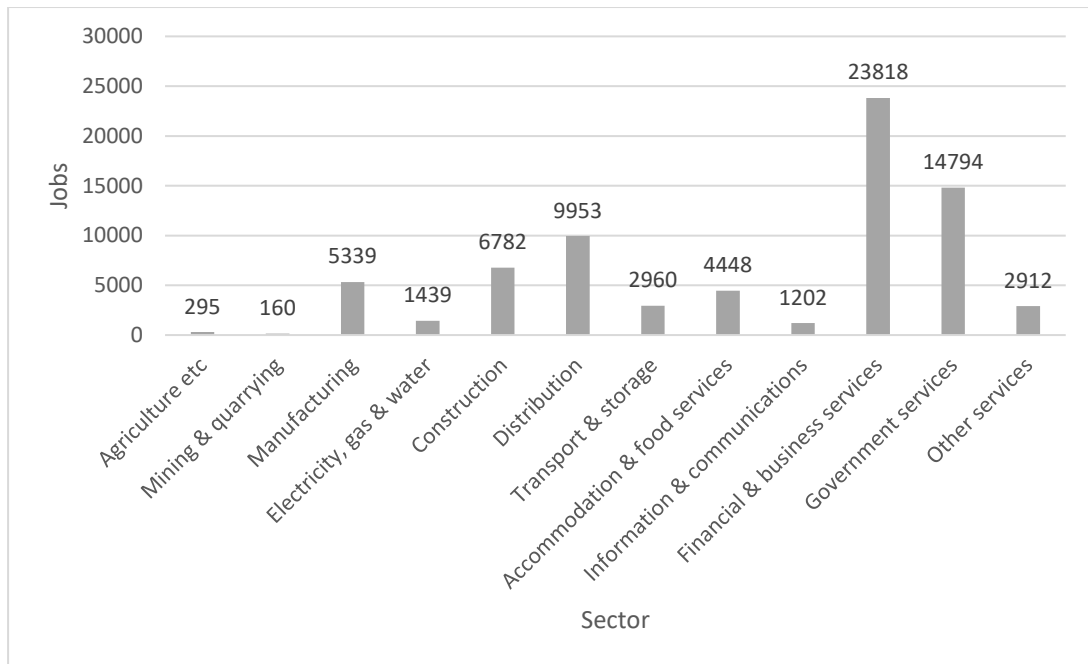
Source: Cambridge Econometrics, 2024

6.14 The projected change of jobs can be disaggregated to 12 business sectors (See Figures 18 to 20). For simplicity, just the longer forecast period to 2046 is shown here.

6.15 Blaby District is projected to lose some 527 manufacturing jobs to 2046, a reduction of 9.9 percent. This is somewhat inconsistent with trends over 2015-2022, which saw a gain of 500 manufacturing jobs, but broadly assumes that increasing automation and efficiency in the sector will reduce employment over time. This trend has been seen in equivalent forecasts across Leicester and Leicestershire, including in the HENA Studies.

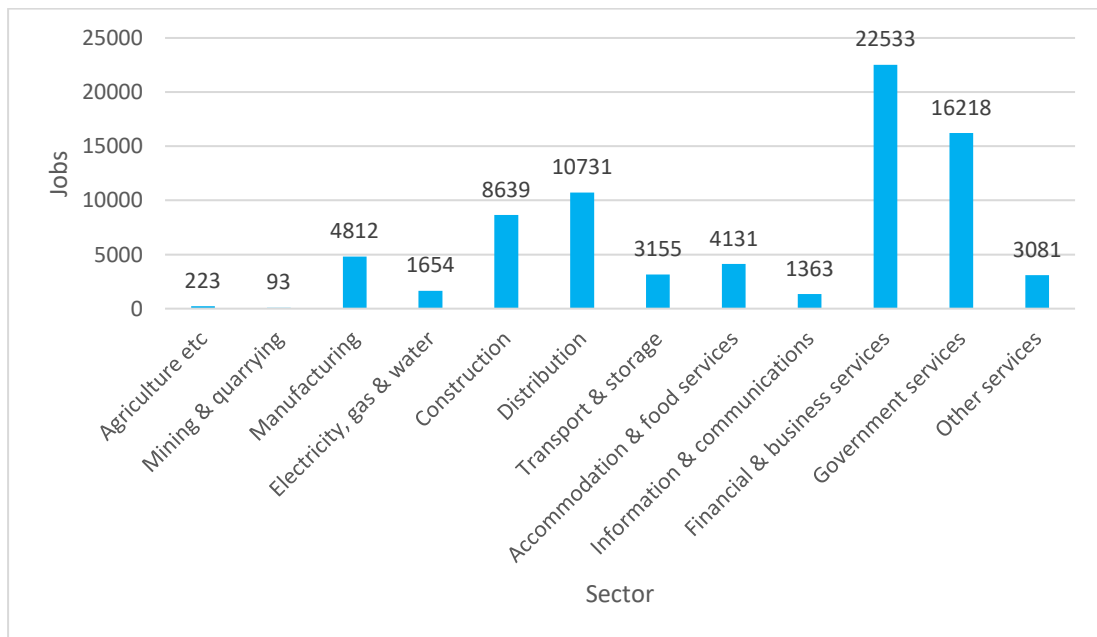
6.16 As is discussed elsewhere in this Study, a reduction in manufacturing employment does not automatically translate into reduced needs for industrial premises as manufacturing firms may expand their physical footprint for a range of reasons unrelated to how many they employ.

Figure 18 – Projected Employment by Sector, 2024



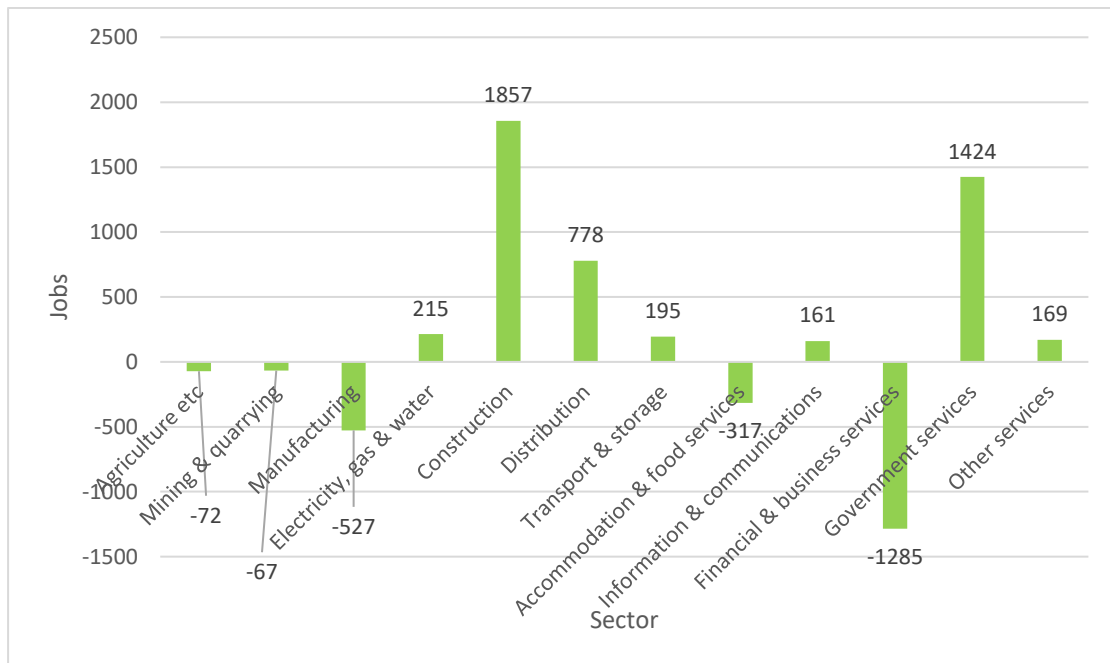
Source: Cambridge Econometrics, 2024

Figure 19 – Projected Employment by Sector, 2046



Source: Cambridge Econometrics, 2024

Figure 20 – Projected Sector Growth/Decline, 2024-2046



Source: Cambridge Econometrics, 2024

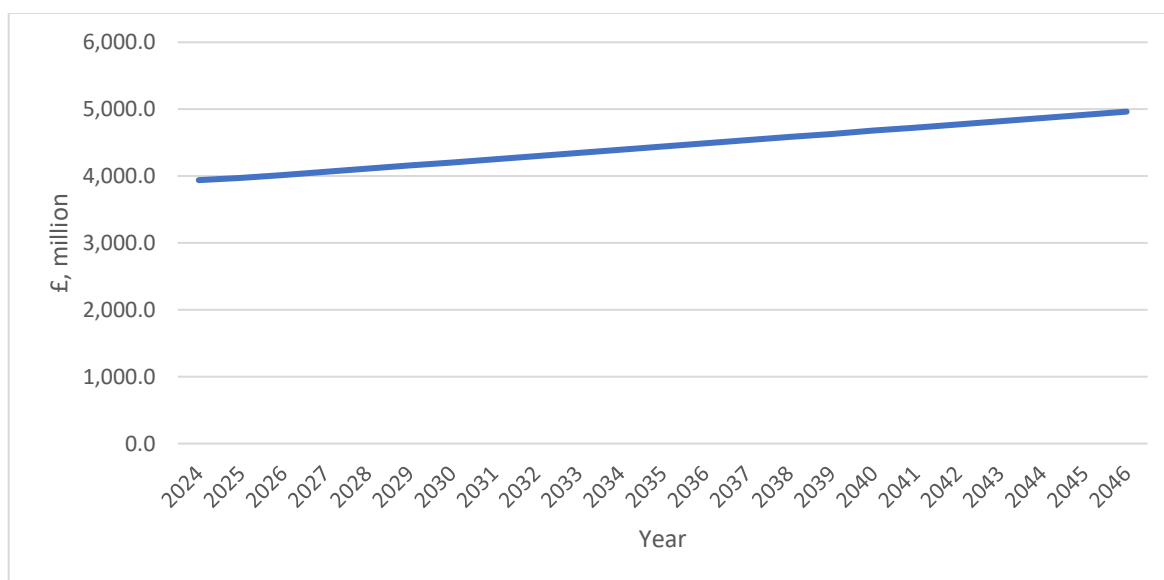
- 6.17 It is worth noting that even with these losses manufacturing will still employ 4,812 locally in 2046, 6.3 percent of local employment, against 7.2 percent, under this dataset, in 2024.
- 6.18 In terms of private office sector jobs, a gain of 161 jobs in ICT is partially offset by a loss of 1,285 jobs in Financial and business services. Over 2015-2022, declines in Financial services employment were observed, although growth in other parts of the office economy was observed. Even with these losses 22,533 will be employed in Financial and business services in 2046, 29.4 percent of employment in that year, compared to just under a third of employment in 2024.
- 6.19 Elsewhere, Agriculture, Mining and quarrying and Accommodation and food are forecast to see some declines. By comparison, Construction is forecast to see strong growth to 2046 which continues the growth seen over 2015-2022 and again highlights the importance of this sector in the local economy.
- 6.20 The logistics sectors – distribution and transport and storage – will see a gain of 983 jobs. Recently, the sector has lost jobs, but did gain 65 companies over 2015-2022, an increase of over a third. This highlights the sector’s potential to support the further employment growth forecast. Elsewhere, sizable growth is projected in Government services.

GVA

6.21 Growth across the sectors is not measured by jobs growth alone. Changes in Gross Value Added (GVA) measures the contribution to the economy of each sector and can show how jobs growth compares with economic growth.

6.22 The Cambridge forecast set out predictions for GVA growth and these are illustrated in Figure 21 and Table 10. It projects consistent GVA growth for Blaby District to 2046, an overall increase of £1,024.6million or a 26.0 percent improvement on 2024. This GVA growth is spread across all sectors, including manufacturing and Financial and business services which are forecast to lose jobs over the same period. This suggests that a lot of the growth will come from productivity improvements in the different sectors, rather than expansions of their respective labour pools.

Figure 21 – Forecast GVA Growth to 2046 (£million)



Source: Cambridge Econometrics, 2024

Table 10 – GVA Growth Forecasts Plan Period 2024-2046, £

Total GVA 2024, Million	Total GVA 2046, Million	GVA Change 2024-2046, Million	GVA (Percent increase 2024-2046)
3,938.9	4,963.5	1,024.6	26.0

Source: Cambridge Econometrics, 2024

Labour Demand Forecast Modelling

6.23 To use the figures provided in the forecasts, several adjustments must be made to allow for real world conditions. Firstly, an allowance is made for part time working in the labour force, by converting the forecasts for total employment, by sector, into forecasts for FTE jobs by sector². This is achieved through an analysis of the proportion of full-time and part-time jobs in each sector in Blaby District as of 2022, using BRES data on the broad industrial sectors.

6.24 Tables 11 and 12 show the total employment change by sector projected by the Cambridge Econometrics forecast along with the conversion into FTE jobs. By forecast period the FTE jobs change for Blaby District is projected to be:

- 2024-2041: 1,792 extra jobs
- 2024-2046: 2,224 extra jobs.

Table 11 – Cambridge Econometrics Total FTE Jobs Change by Sector 2024-2041

Cambridge Forecast Change - Employment by Industry	Total Change 2024-2041	Percentage of Total Jobs likely to be FTE*	FTE Jobs Change 2024-2041
Agriculture etc	-56	73.7	-41
Mining and quarrying	-57	83.3	-47
Manufacturing	-442	90	-398
Electricity, gas and water	155	83.3	129
Construction	1,534	85.7	1,315
Distribution	628	82.5	518
Transport and storage	155	82.5	128
Accommodation and food services	-212	35.7	-76
Information and communications	132	83.3	110
Financial and business services	-1015	70.6	-717
Government services	1,102	73.1	806
Other services	140	47	66
Total	2,062	-	1,792

Source: Cambridge Econometrics/BE Group, 2024

*Full time jobs, as a percentage of all jobs in BRES 2022 data.

² N.B. An FTE job is equal to the number of hours a full-time employee works for an organization. The concept is used to count "hours worked" rather than the number of employees to budget, forecast, staff and calculate wages for in an organisation. For example, if an organisation considers 40 hours per week as full-time and there are four employees who work 10 hours each per week, the hours for those four employees add up together to make 1.0 FTE job. This is considered further in relation to Labour Demand modelling below.

Table 12 – Cambridge Econometrics Total FTE Jobs Change by Sector 2024-2046

Cambridge Forecast Change - Employment by Industry	Total Change 2024-2046	Percentage of Total Jobs likely to be FTE*	FTE Jobs Change 2024-2046
Agriculture etc	-72	73.7	-53
Mining and quarrying	-67	83.3	-56
Manufacturing	-527	90	-474
Electricity, gas and water	215	83.3	179
Construction	1,857	85.7	1,591
Distribution	778	82.5	642
Transport and storage	195	82.5	161
Accommodation and food services	-317	35.7	-113
Information and communications	161	83.3	134
Financial and business services	-1,285	70.6	-907
Government services	1,424	73.1	1,041
Other services	169	47	79
Total	2,531	-	2,224

Source: Cambridge Econometrics/BE Group, 2024

*Full time jobs, as a percentage of all jobs in BRES 2022 data.

6.25 The second consideration is homeworking, which affects the number of new jobs which need to be accommodated in commercial premises and therefore need employment land. The latest data on homeworking, by local authority area, is derived from the 2021 Census. This identifies homeworking rates of 30.2 percent in Blaby District. The 2021 Census does not split homeworking rates by business sector, but it can be assumed that, after the lockdowns associated with the Covid-19 Pandemic have ended at least, homeworking will primarily be found in office-based sector. Also, in Construction where a lot of companies will be micro firms or the self-employed, and home based.

6.26 Reducing the relevant, office-based, sectors by the above proportion, to exclude jobs which would be mostly home based reduces the FTE employment growth to:

- 2024-2041: 1,323 extra jobs
- 2024-2046: 1,641 extra jobs.

- 6.27 2021 Census data was collected at a time when the UK was still experiencing lockdowns associated with the Covid-19 Pandemic, it may therefore exaggerate present homeworking rates, much less homeworking levels moving forward to 2046. However, it was the view of stakeholders, contacted for this study, that large scale homeworking and hybrid working continues to remain a key part of office sector working in Blaby District, but stakeholders could not confirm what proportion of their staff now work mostly from home and what proportion work on a hybrid basis (partly from home, partly from the office). Hybrid workers will still require some office accommodation.
- 6.28 Given the uncertainties around present and future homeworking rates, two scenarios are shown below which illustrate premises and land needs, gross and net of a deduction for homeworking.
- 6.29 In terms of future employment land requirements, only certain sectors will translate jobs into a requirement for employment land. The model assesses what percentage of jobs in each sector translates to floorspace. For example, in transport and storage a percentage of jobs will be warehouse based, whilst the remainder will be drivers not operating on site. Thus, this model is likely to be affected by several key factors:
- The future mix of activities in respect of office, manufacturing and warehousing employment within different sectors. It is not possible to predict the impact of evolving technical change over the period to 2046, and we have therefore assumed that this mix will not change over the period
 - The percentage of employees in each sector that will translate to floorspace. The proportion of people in each industry sector that occupy E(g), B2 or B8 space conforms to those ratios used in other studies and accepted in comparable locations and are sourced from the South East Regional Planning Conference's 'The Use of Business Space'
 - The average space each employee occupies – the employment density. We have assumed no variation in the density rates through to 2046 and have used those densities identified in the HCA 2015 published Employment Densities Guide 3rd Edition. With changing work practices, the densities will vary, but in the absence of more locally sourced or up-to-date data (including post-pandemic workplace practices) this industry accepted data is used

- The average development floorspace per hectare for office, manufacturing and warehousing activities. We have applied the following ratios, which are consistent with those used in the Leicester and Leicestershire HENA and Strategic Distribution Studies:
 - 0.35 (3,500 sqm of floorspace equates to 1 ha of land) for E(g)(i)/(ii) offices and research and development uses outside of Leicester
 - 0.42 (4,200 sqm of floorspace equates to 1 ha of land) for E(g)(iii) and B2 industrial uses
 - 0.40 (4,000 sqm of floorspace equates to 1 ha of land) for B8 storage and distribution uses.

6.30 These assumptions are summarised in Table 13.

Table 13 – Model Assumptions

Industry Sector	Percentage of Staff Occupying E(g), B2, B8 Floorspace (percent)	Floorspace Occupied per Person (sqm)	Other Comments
Agriculture/Mining	5	14	The five percent will comprise managerial, admin, thus E(g)(i) office space. This office space assumes an average of 14 sqm of gross external area per employee based on a blend between business park, serviced office and general office floorspace and assuming that the gross external area of buildings is on average 20 percent higher than the net internal area.
Manufacturing	100	49	Completions data shows that, over the last 17 years at least, Blaby District has lost more B2 general industrial land and premises than it has gained. Overall growth has thus been for E(g)(iii) light industrial units. Ling industrial properties have an average of 49 sqm gross external area per employee. This assumes that the gross external area of buildings is on average 5 percent higher than the net internal area.
Utilities	26	14	The 26 percent will comprise managerial, admin, thus E(g)(i) office space. This office space assumes an average of 14 sqm of gross external area per employee based on a blend between business park, serviced office and general office floorspace and assuming that the gross external area is on average 20 percent higher than the net internal area.
Construction	26	14	The 26 percent will comprise managerial, admin, thus E(g)(i) office space. This office space assumes an average of 14 sqm of gross external area per employee based on a blend between business park, serviced office and general office floorspace and assuming that the gross external area is on average 20 percent higher than the net internal area.

Industry Sector	Percentage of Staff Occupying E(g), B2, B8 Floorspace (percent)	Floorspace Occupied per Person (sqm)	Other Comments
Transport and Distribution	48	77	Warehouses, offices. Given Blaby District's position on the M1 and good prospects for strategic warehouse growth. it is assumed that development in Blaby District will primarily be for Regional Distribution Centres, with an average gross external area of 77 sqm/job.
Private office sectors for example, Financial and Legal, Professional Services	100	14	This office space assumes an average of 14 sqm of gross external area per employee based on a blend between business park, serviced office and general office floorspace and assuming that the gross external area of buildings is on average 20 percent higher than the net internal area.
Government and Other Services	22	14	Local Government, Public Administration for E(g)(i) offices. This office space assumes an average of 14 sqm of gross external area per employee based on a blend between business park, serviced office and general office floorspace and assuming that the gross external area of buildings is on average 20 percent higher than the net internal area.
Wholesale and Retail	5	77	It is assumed that five percent of this employment is within the Wholesale sector within industrial areas. A job density of 77 sqm per job has been applied, equivalent to that of a Regional Distribution Centre.

Source: SERPLAN and Homes England, 2015

- 6.31 Using the adjustments shown in Table 13, the net job figure for each sector is calculated to reflect the proportion of jobs occupying 'E(g) or B' floorspace. That figure is then multiplied by the floorspace per person to give total floorspace for each sector.
- 6.32 Once a total floorspace is calculated, the sqm figures are then translated to a land requirement using the identified ratios. The calculations are provided at Appendix 7. Table 14 shows the resulting land needs, by use.

Table 14 – Forecast Outputs, Hectares

Use	2024-2041	2024-2046
Gross of Homeworking		
Office (inc. Research and Development) Land Need	-0.2	-0.2
Industrial Land Need	-4.6	-4.6
Warehouse Land Need	1.7	1.7
Total Land Need	-3.2	-3.2
Net of Homeworking		

Use	2024-2041	2024-2046
Office (inc. Research and Development) Land Need	-0.4	-0.2
Industrial Land Need	-5.5	-5.5
Warehouse Land Need	2.1	2.1
Total Land Need	-3.8	-3.6

Source: BE Group, 2024

- 6.33 The forecasts project a negative need for employment land, for example the district needs slightly less employment land than it already has.
- 6.34 However, the net outputs are severely limited by the large declines in manufacturing employment predicted in the models, and a smaller net projected decline in office employment (mostly a decrease in Financial and Business Services employment). Even if this decrease does occur as forecast, there is no reason to assume that a decline in employment will lead to a significant loss of employment land. Experience suggests that even where businesses are contracting, in labour terms, they will continue to hold onto sites in anticipation of future improvement and change. Also, where manufacturing jobs are being lost to automation, those new automated processes will still require land on which to operate and can lead to higher productivity and growth.
- 6.35 Thus, there is a case for looking at the land need resulting from sectors predicted to grow only, for example just the warehouse need from Table 14 above. This gives needs of 1.7-2.1 ha to 2041 and 2046.
- 6.36 However, even in a growth only scenario, the figures fall significantly below the forecasts based on historic take-up, discussed next.

Model Two Historic Land Take-Up

- 6.37 Employment land take-up annually is recorded by Blaby District Council. Table 15 shows the schedule of completions between 2006/2007 and 2023/2024, as both floorspace (sqm) and land take up (hectares), split by use class. All figures are net of recorded losses of land in E(g)/B-Class use to other non-employment uses.
- 6.38 It should be noted all figures used here represent the most up to date calculations of completions by Blaby District Council and figures may differ from historical data used in the 2011 Blaby Employment Land Study Refresh.

Table 15 – Employment Land Take-Up 2006/2007-2022/2023. Figures Net of Losses

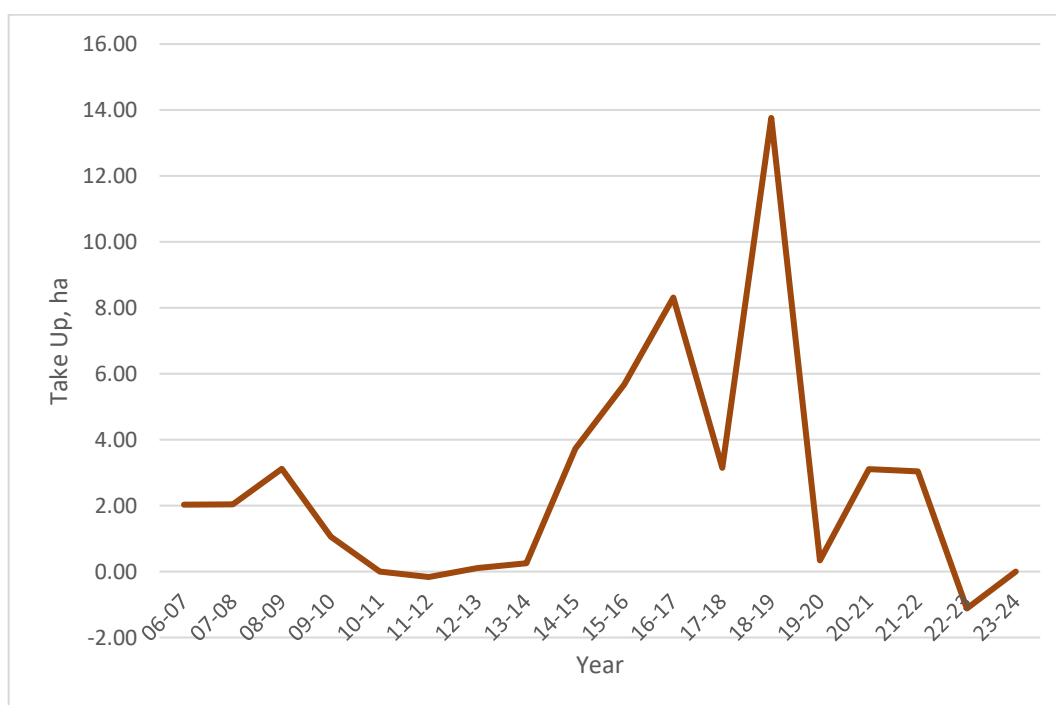
Monitoring Year	Floorspace (sqm): E(g)(i)	Floorspace (sqm): E(g)(ii)	Floorspace (sqm): E(g)(iii)	Floorspace (sqm): B2	Floorspace (sqm): B8	Total Floorspace (sqm)	Land (ha): E(g)(i)	Land (ha): E(g)(ii)	Land (ha): E(g)(iii)	Land (ha): B2	Land (ha): B8	Total Site Area (ha)
2006-2007	8,783.00	0.00	0.00	0.00	0.00	8,783.00	2.03	0.00	0.00	0.00	0.00	2.03
2007-2008	5,372.00	0.00	0.00	-2,040.00	1,320.00	4,652.00	1.21	0.00	0.00	-0.37	1.20	2.04
2008-2009	0.00	0.00	0.00	4,925.00	1,070.00	5,995.00	0.00	0.00	0.00	2.62	0.50	3.12
2009-2010	704.00	0.00	0.00	-1,572.00	2,557.00	1,689.00	0.18	0.00	0.00	-0.41	1.29	1.06
2010-2011	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
2011-2012	560.00	0.00	0.00	-780.00	4,750.00	4,530.00	0.14	0.00	0.00	-1.35	1.05	-0.16
2012-2013	569.00	0.00	0.00	0.00	0.00	569.00	0.11	0.00	0.00	0.00	0.00	0.11
2013-2014	1,282.00	0.00	0.00	0.00	0.00	1,282.00	0.22	0.00	0.00	-0.26	0.29	0.25
2014-2015	-73.00	0.00	30,010.00	2,187.00	-5,628.00	26,496.00	-0.01	0.00	4.96	0.00	-1.22	3.73
2015-2016	3,790.00	0.00	0.00	-9,783.00	44,738.00	38,745.00	0.16	0.00	0.00	-4.58	10.10	5.68
2016-2017	3,125.00	0.00	1,015.00	-199.00	31,473.00	35,414.00	0.64	0.00	0.21	0.79	6.67	8.31
2017-2018	0.00	0.00	0.00	7,316.00	6,236.00	13,552.00	0.00	0.00	0.00	1.84	1.31	3.15
2018-2019	817.00	0.00	557.00	-9,510.00	45,600.00	37,464.00	0.17	0.00	0.12	-5.37	18.84	13.76
2019-2020	1,705.00	0.00	0.00	1,636.00	1,938.00	5,279.00	0.27	0.00	0.00	0.07	0.00	0.34
2020-2021	859.80	0.00	0.00	7,131.80	3,776.00	11,767.60	0.73	0.00	0.00	1.78	0.60	3.11
2021-2022	639.00	0.00	1,605.00	2,778.00	5,947.00	10,969.00	0.25	0.00	0.64	0.00	2.15	3.04
2022-2023	0.00	0.00	-2,500.00	0.00	4,074.00	1,574.00	0.00	0.00	-2.12	0.00	1.00	-1.12
2023-2024	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
-	28,132.80	0.00	30,687.00	2,089.80	147,851.00	208,760.60	6.10	0.00	3.81	-5.24	43.78	48.45

Source: Blaby District Council, 2024

6.39 Based on this data Blaby District has seen 48.45 ha of net take up over the 18-year period for which completions data is available. This equates to **2.69 ha/year**.

6.40 As Figure 22 shows Blaby District's take-up has varied year on year, as to be expected given the discrete nature of land take-up. Before 2014/2015, total completion levels were generally well below 1 ha/year. Between 2014/2015 and 2018/2019 there was then a notable spike in completions, peaking at 13.76 ha in 2018/2019 and reflecting large scale completions at Glenfield Park (Optimus Point). Take up since 2018/2019 has been more modest, with no completions recorded in the latest monitoring year, 2023-2024.

Figure 22 – Employment Land Take-Up 2006/2007-2022/2023



Source: Blaby District Council, 2025

Excluding Strategic Scale Completions

6.41 A separate assessment of needs for strategic logistics land, for premises larger than 9,000 sqm, is currently underway entitled 'Leicester and Leicestershire: Strategic Distribution Floorspace Needs Update and Apportionment' updating previous research and covering the whole of Leicester and Leicestershire. Therefore, there is a case to remove these very large completions from the Take Up data to avoid the double counting of identified need between the strategic logistics needs study and this Blaby District specific local Employment Land and Premises Study.

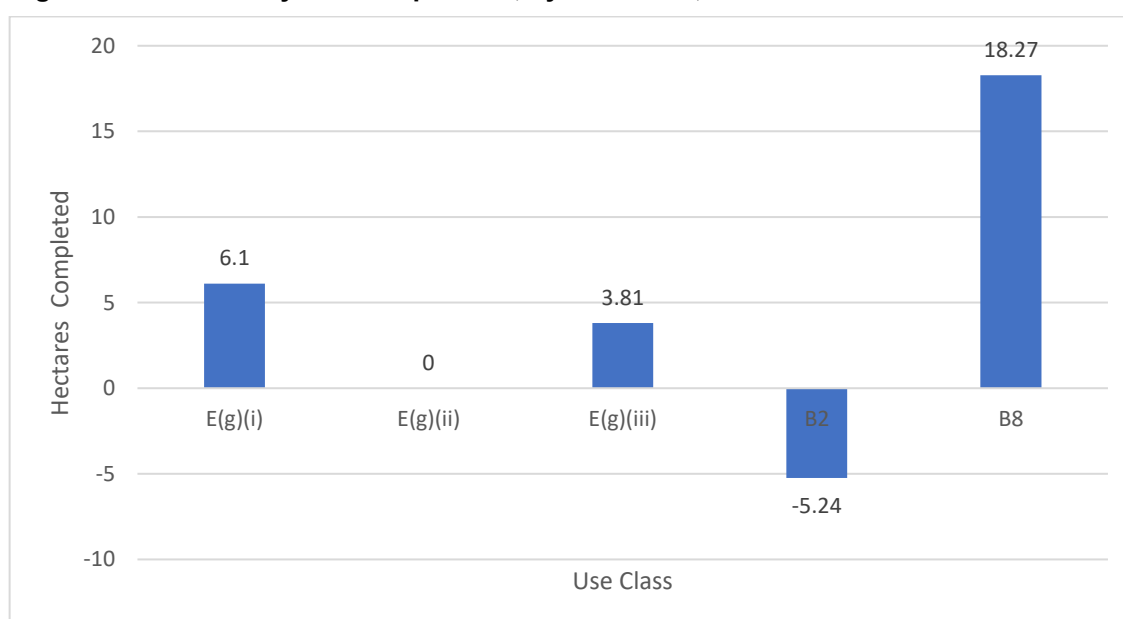
6.42 A review of the take up schedule, cross checked against data provided by the District Council for the strategic logistics studies, shows that the completions data set out in Table 15 above, includes five mostly B8 buildings larger than 9,000 sqm each:

- Two buildings totalling 31,112 sqm at Land north of Leicester Lane, Lubbesthorpe in 2018.
- One building of 26,200sqm at Plot 80, Optimus Point in 2016/17.
- Two buildings totalling 44,738 sqm at Land off Kirby Road / Ratby Lane, Glenfield in 2015/16.

6.43 These completions total 102,050 sqm, which equates to 25.51 ha at a standard ratio of 4,000 sqm/hectare. Excluded from the B8 warehousing total, as these are primarily B8 logistics properties, reduces that total 18.27 ha or 1.02 ha/year. Overall take up, across all the Use Classes, reduces to **22.94 ha or 1.27 ha/year**.

6.44 Figure 23 splits that 22.94 ha of local take up by Use Class. It shows that, even with the strategic completions removed, over three quarters of the take up (18.27 ha) was for B8 warehousing. The remainder comprised a mixture of office and light industrial development. Overall, the district has lost B2 general industrial land and premises as older factories are redeveloped for other uses. 26.6 percent of take up was for E(g)(i) offices, with 2006/2007 seeing the highest rate of office completions, and 16.6 percent for E(g)(iii) light industrial uses

Figure 23 – Local Only Net Completions, by Use Class, hectares



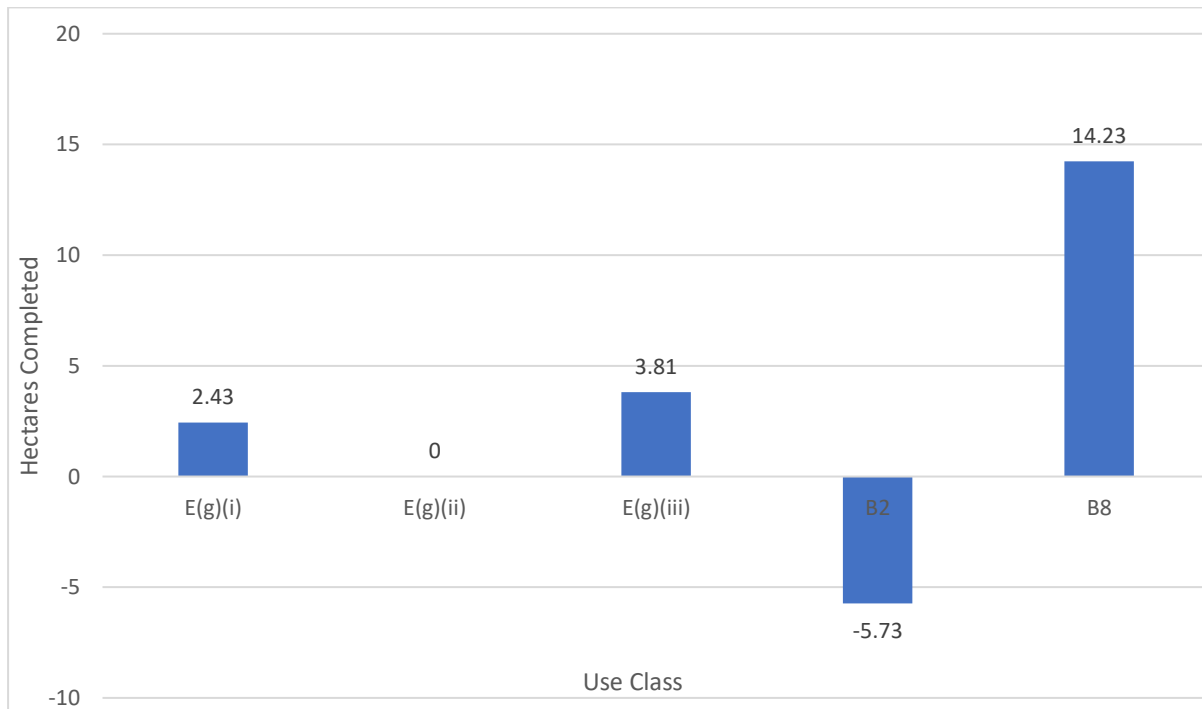
Source: Blaby District Council, 2025

Sensitivity Testing – Reviewing Take Up Post the 2008-2013 National Recession

6.45 The last national recession left significant and lasting impacts on the UK property market, including viability impacts on the delivery of office premises and growing demand for logistics accommodation which has continued into the 2020s. To consider how the recession has changed the property market in Blaby District, this scenario only reviews take up over the 11 post recession years 2013-2014 to 2023-2024.

6.46 Since 2013-2024, the district saw 14.74 ha of recorded net local take up or 1.34 ha/year. As Figure 24 shows, trends by Use Class are similar to the full take up period discussed above, if even more pronounced. Allowing for the fact that some figures are negative, then 96.5 percent of the recorded completions were for B8 warehousing. 16.5 percent of take up was for E(g)(i) offices and 25.8 percent was for E(g)(iii) light industrial uses. Again the trend for B2 general industry was a net negative, with the district losing more factory floorspace than it gained. Thus while B8 warehousing development did dominate over this period, there were still some completions of offices and light industry which were sizable, at least in proportionate terms.

Figure 24 – Net Local Completions 2013-2024, by Use Class, hectares



Source: Blaby District Council, 2025

6.47 The sections below provide local take up models for both the full (2006-2024) and reduced (post-recession) take up periods.

Comparing Take Up to Employment Levels

6.48 One point to highlight is that it is not possible to link take up levels to jobs change in the district. To illustrate this, Table 16 converts recorded local completions in Blaby District, since 2006/2007 to jobs using standard densities from the Homes England 'Employment Densities Guide' (2015). These can be compared to the jobs which were generated in the district, in relevant sectors, over that same period.

Table 16 – Jobs Generated in Period vs Local Employment Land Take-Up 2006/2007-2023/2024

Year	Office (inc. Research and Development)	Industrial (inc. Light Industrial)	Warehousing	Total
Local Floorspace Completed, Net of Losses, Sqm	28,132.80	32,776.80	45,801	106,711
Jobs Density Applied (Sqm per Job)	14	49	77	-
Jobs Generated*	2,009	669	595	3,273
Actual Jobs Generated, as identified in Cambridge Forecasts (FTE Jobs which would occupy relevant space)	10,410	1,097	-279	11,228

Source: Cambridge Econometrics, Blaby District Council, BE Group, 2025

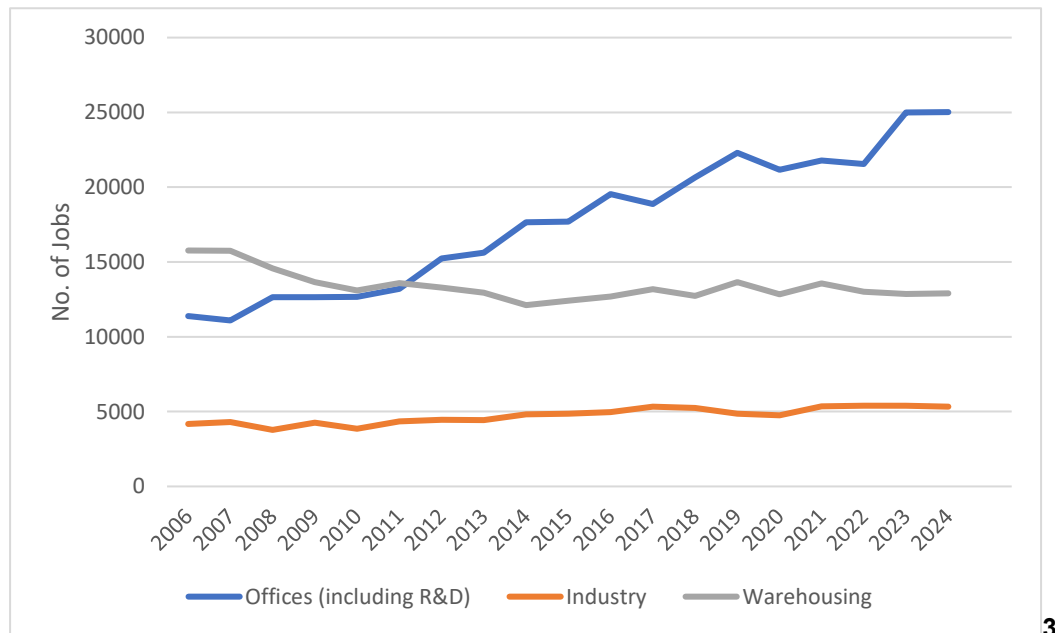
*Jobs Densities discussed further in Table 13 above.

6.49 Table 16 shows there is little relationship between take up and the number of jobs generated. A simple division of the floorspace created suggests that 3,273 jobs should have been created, in relevant sectors, when in reality, 11,228 Full Time Equivalent (FTE) jobs were, for example more than triple. Even if the strategic Take Up is put back into the calculation, job numbers only increase to 4,599.

6.50 However, Table 16 also shows that there are extensive differences between the use classes in terms of jobs generated which is why the use of a single jobs/hectare figure for all E(g)/B-Class sectors is unrealistic. In terms of the office sector, as is shown in Table 16, the significant gain of 10,410 jobs (most of which, 9,500, was in Financial and business services) has not been reflected in the floorspace take-up figures. This suggests that most of these jobs have been accommodated in existing or refurbished office properties rather than prompting extensive new build development or redevelopment.

- 6.51 There is also a limited linkage between the figures for industrial jobs and even less so for warehousing where the real-world change was a net loss of jobs. This illustrates that businesses in industrial and warehousing sectors will seek premises for reasons other than jobs change, including to accommodate new production processes and/or storage uses. This is something highlighted throughout this Section.
- 6.52 Finally, Figure 25 shows jobs change, by sectors relevant to the E(g)/B Use Classes over 2006-2024, as identified by the Cambridge Forecasts. As can be seen, the fluctuations in jobs numbers have little relation the sharp changes in employment land completions recorded in Figure 20 above.

Figure 25 – Jobs Change, Split by Use Class (Main Relevant Sectors) 2006-2024



Source: Cambridge Econometrics, 2024

Testing Labour Demand Model Using Actual Take Up and Employment Figures

- 6.53 Comparing the take up data from 2006/2007 to 2023/2024 with the FTE employment figures from 2006-2024 gives an indicator as to the effectiveness of the labour demand model when it comes to predicting employment land need. Running the past employment figures provided by Cambridge through the model gives the following results, as set out in Table 17. The 2006-2024 jobs forecast is set out in Appendix 7.

Table 17 – Labour Demand Forecast Need 2006-2024 Compared to Actual Local Take Up 2006/2007-2023/2024, Hectares

Use Class	Labour Demand Forecasting Predicted Need	Actual Local Take Up, Net of Losses
Office (inc. Research and Development)	42.00	6.10
Industrial Land	12.20	-1.43
Warehouse Land	-5.10	18.27
Totals	49.10	22.94 (Inc. strategic 48.45)

Source: Cambridge Econometrics, Blaby District Council, BE Group, 2025

- 6.54 The results of this exercise find that the Labour Demand Model projects an overall land need very close to that which was ultimately delivered over 2006-2023, although only if the strategic B8 take up is also included, 49.10 ha against 48.45 ha. However, Labour Demand Modelling also indicates that most of the land take up should have been for office development, followed by industrial development, with a net loss of warehousing land. In practice, almost the exact opposite occurred with 79.6 percent of real-world development being for B8 storage and distribution, even if strategic logistics developments are included. 26.6 percent was for offices and industrial saw a net loss of land.
- 6.55 Thus, while the Labour Demand Model does not appear inaccurate overall, it does place undue emphasis on office sector growth, which is unsurprising as this is where most relevant jobs growth has occurred, in Blaby District, since 2006. In practice, most of that extra office employment appears to have been accommodated in existing or refurbished buildings with only modest new build development, or redevelopment, occurring. It also does not account for the fact that, net of losses, Blaby District has lost more industrial land than it has gained
- 6.56 The Labour Demand Model also significantly underestimates warehousing take up. As was discussed previously, this can be explained by requirements for warehouse premises being more driven by needs for storage space than the need to accommodate changing staffing levels. Thus, such companies may have ongoing property requirements even when they are reducing the numbers they employ, particularly if automation is improving productivity per worker.

Summary of Blaby OAN and Further Adjustments

6.57 This Section has undertaken Past Take-Up (for the full 2006-2024 forecast period and for a shorter period post the last national recession, 2013-2024) and Labour Demand modelling to consider the OAN for Blaby District. The findings are summarised in Tables 18 to 19.

Table 18 – Blaby OAN Projections – Labour Demand Models, Hectares

Use	2024-2041	2024-2046
Gross of Homeworking		
Office (inc. Research and Development) Land Need	-0.2	-0.2
Industrial Land Need	-4.6	-4.6
Warehouse Land Need	1.7	1.7
Total Land Need	-3.2	-3.2
Net of Homeworking		
Office (inc. Research and Development) Land Need	-0.4	-0.2
Industrial Land Need	-5.5	-5.5
Warehouse Land Need	2.1	2.1
Total Land Need	-3.8	-3.6

Source: Cambridge Econometrics, MBC, BE Group, 2024

Table 19 – Blaby OAN Projections – Past Take Up Model, Hectares*

Take Up Model	Forecast Period	Average Take Up Projected Over the Forecast Periods: Office (inc. Research and Development) Land	Average Take Up Projected Over the Forecast Periods: Industrial Land	Average Take Up Projected Over the Forecast Periods: Warehouse Land	Average Take Up Rate Projected Over the Forecast Periods: Total Land Need
Long Term Take Up Period – 2006-2024	2024-2041 (x23 (years))	6.10	-1.43	18.27	22.94
Long Term Take Up Period – 2006-2024	2024-2046 (x28 (years))	7.82	-1.84	23.46	29.44
Short Term Take Up Period – 2013-2024	2024-2041 (x23 (years))	3.96	-3.06	24.12	25.02
Short Term Take Up Period – 2013-2024	2024-2046 (x28 (years))	5.06	-3.91	30.82	31.97

Source: BE Group, 2025

*Based on past local take up only, excluding all past completions of B8 units larger than 9,000 sqm in size.

6.58 Clearly there are substantial differences in the outputs of the different models. Take up modelling suggests that Blaby District will need additional office land, while jobs forecasting suggests no such land would be required. All the models do suggest that less industrial land is required, however. Most dramatically, take up projections suggest that up to 30.82 ha of B8 warehousing land is needed while jobs forecasting suggests the requirement is only 1.7-2.1 ha. Before consideration of a preferred model, further adjustments are made as below to allow the models to better reflect real world conditions.

Further Adjustments

6.59 To provide an indication of the final need for employment land, it is appropriate to make some allowance for frictional vacancy within employment floorspace and to provide some margin within the supply of land to provide a choice of sites.

Vacancy

6.60 It is widely accepted that 5-10 percent vacancy is always required in commercial markets. A level of vacant floorspace is necessary to ensure churn and choice for companies, allowing innovation, inward investment, resizing of existing business requirements and refurbishments. BE Group have therefore assumed a need to achieve a 7.5 percent vacancy rate within the local stock, a mid-point between 5-10 percent, to achieve a well-functioning commercial property market.

6.61 As was noted in Section 3.0, overall industrial (including warehouse) vacancy rates, by floorspace, as of October 2024 were close to that mid-point at 8.50 percent. That vacancy is focused on a modest number of larger units which is why, by premises, the industrial vacancy rate was only 2.40 percent. However, overall, there is still a reasonable amount of floorspace on the market at this time. This, combined with the modest forecast of jobs growth in industrial/warehouse sectors, and the fact that the district has seen a net loss of B2 land over the last 18 years make it harder to justify the building in an allowance for more vacancy in the OAN. Even if a further buffer was included it could not be guaranteed that the extra land would be used to deliver the smaller industrial and warehouse properties which appear to be missing from the existing vacant supply.

- 6.62 A further allowance to increase vacancy in the office market is also not considered necessary given uncertainties around office demand post the Covid-19 Pandemic, evidence that local office employment may decline slightly overall and the difficulties in viably delivering private sector office stock. Such an adjustment would likely over inflate need and the extra OAN could be hard to deliver.

Buffer

- 6.63 A buffer in supply should be applied to reflect a choice of sites by size, quality and location and to provide a continuum of supply beyond the end of the forecast period. This makes some allowance for the exceptional loss of further employment land to non E(g)/B-Class uses, over and above, that already allowed for. It also allows for increasing difficulty in monitoring losses moving forward as changes of use, away from E(g), B2, B8 uses, increasingly occur via the enhanced permitted development rights available under the 2020 Use Classes Order.
- 6.64 There is no set guidance on how long this buffer should be, however, in over 70 employment land studies completed by BE Group over the last 20 years, a buffer of 5 years has usually been applied.
- 6.65 A five-year buffer has been identified as an acceptable margin in Local Plan Examinations in Public (EIPs), in which BE Group's employment land reviews have been appraised. Most recently this included the Leicester Local Plan 2020-2036 EIP of 2024, at which BE Group both produced the employment land evidence and then defended that evidence at EIP sessions.

Replacement Demand

- 6.66 Many employment land studies consider whether there is a need to make an allowance for replacing future losses that may follow past patterns, or to compensate for past losses. They may therefore apply Gross Take Up figures (gross of recorded losses) which would assume that all losses need to be replaced with new development over the forecast period.

- 6.67 However, not all losses automatically need to be replaced. While some losses may solely reflect the desire of landowners to convert sites/buildings to higher value uses, the properties lost may also be of a specification, quality, tenure or in a location that is no longer desired by the market. The survey of Employment Areas, summarised in Section 5.0, suggests that Blaby District does not have a particular problem with large amounts of low grade stock and while the district has certainly seen losses, particularly of B2 premises, there is no evidence that such losses are displacing large numbers of businesses who might otherwise not wish to relocate. Stakeholders report that the market for smaller industrial and warehouse buildings is strong and there are only 18 units on the market at this time. Thus, it is likely that if the individual buildings recorded lost were still needed by the market, they would have been occupied.
- 6.68 Reflecting this, it is the view of this Study that the Net Take Up rates used throughout this section are correct and should continue to be applied, if day to day losses do not need to be replaced. In taking this view, it should be noted that the five year buffer, applied above, makes some allowance for exceptional losses, which fall outside regular patterns of change.

Adjusted OAN Figures

- 6.69 The revised findings, including five-year buffer on all need figures and utilising Net Past Take Up figures only are set out in Tables 20 to 21.

Table 20 – Blaby OAN Projections – Labour Demand Models – With a 5-Year Buffer, Hectares*

Use	2024-2041	2024-2046
Gross of Homeworking		
Office (inc. Research and Development) Land	-0.2	-0.2
Industrial Land	-4.6	-4.6
Warehouse Land	2.2	2.2
Total Land Need	-2.6	-2.6
Net of Homeworking		
Office (inc. Research and Development) Land	-0.4	-0.2
Industrial Land	-5.5	-5.5
Warehouse Land	2.7	2.7
Total Land Need	-3.2	-3.0

Source: Cambridge Econometrics, MBC, BE Group, 2024

*Buffer not applied to negative figures.

Table 21 – Blaby OAN Projections – Past Take Up Model, Net of Losses – With a 5-Year Buffer, Hectares*

Take Up Model	Forecast Period	Average Take Up Projected Over the Forecast Periods: Office Research and Development) Land	Average Take Up Projected Over the Forecast Periods: Industrial Land	Average Take Up Projected Over the Forecast Periods: Warehouse Land	Average Take Up Projected Over the Forecast Periods: Total Land Need
Long Term Take Up Period – 2006-2024	2024-2041 (x23 (years))	7.82	-1.84	23.46	29.44
Long Term Take Up Period – 2006-2024	2024-2046 (x28 (years))	9.52	-2.24	28.56	35.84
Short Term Take Up Period – 2013-2024	2024-2041 (x23 (years))	5.06	-3.91	30.82	31.97
Short Term Take Up Period – 2013-2024	2024-2046 (x28 (years))	6.16	-4.76	37.52	38.92

Source: BE Group, 2025

*Based on past local take up only, excluding all past completions of B8 units larger than 9,000 sqm in size.

Differences Between the OAN Output and the HENA (2022)

- 6.70 The OAN need identified in this study, for 21.62-32.76 ha of exclusively local industrial and warehouse land is very different from the need identified in the 2022 HENA. For Blaby District, over the period 2021-2041, which is most comparable to the timeframes of this Study, the HENA identified needs of 46.1 ha, some 19-24 ha more than the present need. Within that 46.1 ha requirement the HENA also identified 11.4 ha of office need while this Study has no requirement for office land.
- 6.71 The HENA’s OAN for offices is based on Labour Demand modelling forecast jobs change. As was discussed previously the Cambridge Econometrics forecasting used for this 2024/2025 study is more pessimistic about jobs growth compared to 2021-based projections in the HENA 2022. Specifically, the more recent forecast suggests that Blaby District will lose more office jobs, particularly Financial services jobs, than it will gain. Thus it is the view of this more recent forecast that financial services in Blaby District will peak, and reduce somewhat over the period to 2046, at least in terms of jobs. This likely reflects factors such as growing use of AI to replace workers, business relocation and a weaker UK services economy and more national economic headwinds generally. The more historic HENA 2022 forecast clearly anticipated a stronger service sector economy moving forward, with less impact from these factors. While the most recent forecast projection may be the most pessimistic, it is still preferable to use the most up to date projections of growth to inform this Study, however.

6.72 The HENA's OAN for industrial and distribution, 34.7 ha over 2021-2041 is based on the forward projection of local only past take up. The take up used by HENA was both net and gross of past losses, whereas this study has only used net completions data (as this best reflects real world change in the district, in which space is both gained and lost). The past take up period used in the HENA is 2011/2012 to 2019/2020 compared to this Study which uses a wider period of take up – 2006/2007 to 2023/2024 (2013/2014 to 2023/2024 for the Post Recession scenario). The differing take up periods analysed, utilising both gross and net data in the case of HENA, with varying periods of high and low completion levels will inevitably lead to different forecast outputs. Certainly the period 2011-2020, used in HENA, saw some of Blaby District's highest levels of annual completions, even excluding units greater than 9,000 sqm in size, while completion rates in the late 2000s and early 2020s were more modest. It is discussed further below whether, Past Take Up projections should be based on some, or all, of the historic take up period available for modelling.

Recommended Models

6.73 **Office OAN:** Experience suggests that the quantum of office space required by businesses is strongly driven by the number of staff they must accommodate, something best reflected in the jobs-based Labour Demand model. As noted above, a focus on jobs change can lead to an overestimate of the amount of office land needed, when compared to real world take up, but that is clearly not the case here, with the need figures being a net negative.

6.74 As most of the projected jobs growth is in office based sectors, utilising Labour Demand modelling for offices also means that OAN will account for the bulk of the employment change moving forward. In this regard, it allows linkages to be made between employment land and housing needs as the latter will also be informed, at least in part, by forecasts of jobs change.

6.75 As forecasts of office jobs change are negative overall, reflecting projected losses in Financial and Business Services, there is no requirement to allocate any land specifically to meet office needs. This does not imply that no offices will be built in Blaby District, to 2046, only that there is not a need to allocate sites specifically to meet office requirements. Rather, where viable, offices will be brought forward in mixed-use schemes or through redevelopment/refurbishment.

- 6.76 It should also be noted that a proportion of the additional E(g)(i) jobs which are forecast will be accommodated in any B2/B8 properties developed. Modern industrial and warehouse units increasingly combine administrative functions with production and logistics functions, on single sites for greater efficiency. For example, the 2023 research paper 'Critical Infrastructure: Driving Employment Growth within the UK's Logistics Sector' by Prologis indicates that an average 46,450 sqm B8 unit will employ 67 office staff and 45 managerial staff. This represented just under a quarter of the 480 total staff employed in that example facility.
- 6.77 Although less relevant in this context, as all figures are negative, it should still be noted that demand models net of homeworking are more realistic at this time. Discussions with stakeholders suggest that some three years after the end of the Covid-19 Pandemic and associated Lockdowns, homeworking and hybrid working practices are here to stay with impacts on the quantum of space businesses need. This, together with the current viability issues associated with office development, suggests that office take up will take place at a structurally lower rate than the past take up model would suggest, which is another reason why Labour Demand modelling is preferred here.
- 6.78 **Industrial and Warehouse OAN:** It should first be noted that industrial and (non-strategic) warehouse needs can be linked together as, at the local scale at least, demand for industrial/warehouse space is frequently interchangeable, particularly on industrial estates where outline consents are usually for general B Class Units, with the ultimate use determined by the occupier.
- 6.79 As referenced above, requirements for industrial and warehouse premises are more driven by needs for production and storage space than the need to accommodate changing staffing levels. Thus, such companies may have ongoing property requirements even when they are reducing the numbers they employ, particularly if automation is improving productivity per worker. Industrial and warehouse companies are also more likely to acquire and hold onto expansion land and premises, even in times of contraction in the business, than office sector companies, in anticipation of future growth. This results in a weaker link to the jobs-based Labour Demand modelling that was true for offices, again as illustrated by analyses above. Additionally, the Labour Demand model forecasts negative or negligible land needs in the industrial sector which is at odds with identified market demand and the largely industrial committed local employment land supply.

6.80 Here therefore the Past Take Up model is recommended as it is independent of jobs change projections and based on real world trends. It accounts for periods of growth and recession in the local economy since 2006/2007, allowing that such economic growth and decline will continue to 2046. It is thus likely to be better in tune with real market demand than the Labour Demand model. As office sector need has already been accounted for, the industrial and warehouse sector OAN excludes office provision, to avoid double counting. Consequently, the recommended industrial and warehouse sector OAN is:

- **2024-2041 – 21.62-26.91 ha**
- **2024-2046 –26.32-32.76 ha.**

(N.B. Figures shown represent the warehouse need less the negative industrial need).

6.81 In terms of whether the Past Take Up Model should be based on the analysis of short term (2013-2024) or long term (2006-2024) historic completions (or potentially the period 2011/2012 to 2019/2020 which was used in the HENA, 2022), BE Group would argue the longer period should be favoured. The maximum analysis period, 2006-2024, takes in several periods of growth and recession in the national economy which occurred and which may happen again. In this regard using longer term take up would be consistent with Planning Practice Guidance, specifically Para 027 of 'Housing and Economic Needs Assessments' which indicates that "Authorities will need to take account of longer term economic cycles in assessing this data..."

6.82 Although the national recession certainly impacted on the property market since 2013, there will doubtless be further changes to 2046, and while we cannot know what they will be, taking the broadest view on the available data provides the best chance of accounting for uncertainties about the future. Finally, it should also be noted that the differences in outputs between the short and long term forecast models are modest, with the largest variation being an extra 5 ha of requirement on the warehouse need under the short term forecast.

6.83 **For these reasons it is recommended that the Take Up figures for the full recorded period 2006-2024, be used to calculate industrial OAN. This gives needs of 21.62 ha to 2041 and 26.32 ha to 2046.**

6.84 Section 5.0 identifies a realistic 2024 committed employment land supply scenario of to 42.04 ha, if just sites suited for industrial and warehouse use are included. Thus, Blaby District has sufficient land to meet local needs, to 2046.

Summary

6.85 Two alternative forecast options have been produced and considered for the 2024-2041, 2024-2046 period for Blaby District. These models include a Past Take Up model (reviewing completions data over 2006-2024, and the shorter, post-recession period of 2013-2024) and a Cambridge Labour Demand model. The need calculated in each model allows for a five-year buffer to allow for choice and potential change in needs during the Plan Period as well as accounting for exceptional further losses in the supply. The outputs of the models are summarised in Table 22 and 23.

Table 22 – Blaby OAN Projections – Labour Demand Models – With a 5-Year Buffer, Hectares*

Use	2024-2041	2024-2046
Gross of Homeworking		
Office (inc. Research and Development) Land	-0.2	-0.2
Industrial Land	-4.6	-4.6
Warehouse Land	2.2	2.2
Total Land Need	-2.6	-2.6
Net of Homeworking		
Office (inc. Research and Development) Land	-0.4	-0.2
Industrial Land	-5.5	-5.5
Warehouse Land	2.7	2.7
Total Land Need	-3.2	-3.0

Source: Cambridge Econometrics, MBC, BE Group, 2024

*Buffer not applied to negative figures.

Table 23 – Blaby OAN Projections – Past Take Up Model, Net of Losses – With a 5-Year Buffer, Hectares*

Take Up Model	Forecast Period	Average Take Up Projected Over the Forecast Periods: Office Research and Development) Land	Average Take Up Projected Over the Forecast Periods: Industrial Land	Average Take Up Projected Over the Forecast Periods: Warehouse Land	Average Take Up Projected Over the Forecast Periods: Total Land Need
Long Term Take Up Period – 2006-2024	2024-2041 (x23 (years))	7.82	-1.84	23.46	29.44
Long Term Take Up Period – 2006-2024	2024-2046 (x28 (years))	9.52	-2.24	28.56	35.84
Short Term Take Up Period – 2013-2024	2024-2041 (x23 (years))	5.06	-3.91	30.82	31.97
Short Term Take Up Period – 2013-2024	2024-2046 (x28 (years))	6.16	-4.76	37.52	38.92

Source: BE Group, 2025

*Based on past local take up only, excluding all past completions of B8 units larger than 9,000 sqm in size.

- 6.86 **Office OAN:** Experience suggests that the quantum of office space required by businesses is strongly driven by the number of staff they must accommodate, something best reflected in the jobs-based Labour Demand model. As noted above, a focus on jobs change can lead to an overestimate of the amount of office land needed, when compared to real world take up, but that is clearly not the case here, with the need figures being a net negative.
- 6.87 As most of the projected jobs growth is in office based sectors, utilising Labour Demand modelling for offices also means that OAN will account for the bulk of the employment change moving forward. In this regard, it allows linkages to be made between employment land and housing needs as the latter will also be informed, at least in part, by forecasts of jobs change.
- 6.88 As forecasts of office jobs change are negative overall, reflecting projected losses in Financial and Business Services, there is no requirement to allocate any land specifically to meet office needs. This does not imply that no offices will be built in Blaby District, to 2046, only that there is not a need to allocate sites specifically to meet office requirements. Rather, where viable, offices will be brought forward in mixed-use schemes or through redevelopment/refurbishment while industrial and warehouse developments increasingly accommodate large components of administrative, ICT and managerial staff.

- 6.89 Although less relevant in this context, as all figures are negative, it should still be noted that demand models net of homeworking are more realistic at this time. Discussions with stakeholders suggest that some three years after the end of the Covid-19 Pandemic and associated Lockdowns, homeworking and hybrid working practices are here to stay with impacts on the quantum of space businesses need. This, together with the current viability issues associated with office development, suggests that office take up will take place at a structurally lower rate than the past take up model would suggest, which is another reason why Labour Demand modelling is preferred here.
- 6.90 **Industrial and Warehouse OAN:** It should first be noted that industrial and (non-strategic) warehouse needs can be linked together as, at the local scale at least, demand for industrial/warehouse space is frequently interchangeable, particularly on industrial estates where outline consents are usually for general B Class Units, with the ultimate use determined by the occupier.
- 6.91 As referenced above, requirements for industrial and warehouse premises are more driven by needs for production and storage space than the need to accommodate changing staffing levels. Thus, such companies may have ongoing property requirements even when they are reducing the numbers they employ, particularly if automation is improving productivity per worker. Industrial and warehouse companies are also more likely to acquire and hold onto expansion land and premises, even in times of contraction in the business, than office sector companies, in anticipation of future growth. This results in a weaker link to the jobs-based Labour Demand modelling that was true for offices, again as illustrated by analyses above. Additionally, the Labour Demand model forecasts negative or negligible land needs in the industrial sector which is at odds with identified market demand and the largely industrial committed local employment land supply.
- 6.92 Here therefore the Past Take Up model is recommended as it is independent of jobs change projections and based on real world trends. It accounts for periods of growth and recession in the local economy since 2006/2007, allowing that such economic growth and decline will continue to 2046. It is thus likely to be better in tune with real market demand than the Labour Demand model. As office sector need has already been accounted for, the industrial and warehouse sector OAN excludes office provision, to avoid double counting. Consequently, the recommended industrial and warehouse sector OAN is:

- 2024-2041 – 21.62-26.91 ha
- 2024-2046 –26.32-32.76 ha.

(N.B. Figures shown represent the warehouse need less the negative industrial need).

6.93 It is argued that the figures based on an analysis of all take up since 2006 provide the broadest assessment of market change, reflecting Planning Practice Guidance. This gives needs of 21.62 ha to 2041 and 26.32 ha to 2046.

6.94 Section 5.0 identifies a realistic 2024 committed employment land supply scenario of to 42.04 ha, if just sites suited for industrial and warehouse use are included. Thus, Blaby District has sufficient land to meet local needs, to 2046.

7.0 POTENTIAL EMPLOYMENT GROWTH OPPORTUNITIES

Introduction

- 7.1 This section considers other employment opportunity sites which could be adopted in the new Blaby District Local Plan, as required and as judged appropriate by the Council, while balancing other issues, to meet the local needs identified in Section 6.0. Any such provision would be additional to the realistic committed supply of existing employment land identified in Section 5.0.
- 7.2 The potential employment growth opportunities comprise employment candidate sites that Blaby District Council received through Call for Sites and SHELAA exercises for the emerging Local Plan. These sites were submitted with E(g)/B-Class employment as at least one of the preferred uses listed by the respondent.

Assessment

- 7.3 The 15 sites were appraised against high-level constraints (accessibility, stated physical issues, etc.); their 'fit' with identified market demand/ability to fill a defined supply gap and potential ability to deliver premises within the next Local Plan period. Based on how well the site performs against these criteria, it is graded A-E. Grades and resulting recommendations are set out in Table 24. The results of the site review are outlined in Table 25. Relevant sites are mapped in Appendix 8.

Table 24 – Grades A to E Definitions

Grade	Definition	Recommendation
A+	<p>Site has no large-scale constraints</p> <p>It is well placed, and of a size, to meet strategic and/or local demand and attract inward investment</p> <p>Site is in developer control, or has other strong indications of deliverability early in the Plan Period</p>	<p>Subject to other considerations, site represents a strong candidate for inclusion in the Local Plan to meet needs for E(g)/B2/B8 uses and attract inward investment. The site could meet either strategic and/or local needs depending on the scale and nature of the land ultimately allocated and the focus of any development consented.</p>
A-	<p>Site has some, possibly significant constraints, although these can potentially be overcome with investment</p> <p>It is well placed, and of a size, to meet strategic and/or local demand and attract inward investment</p> <p>Site is in developer control, or has other strong indications of deliverability in the Plan Period</p>	<p>Constraints raise some questions over deliverability but there remains a way forward to development if certain issues can be addressed.</p> <p>Subject to other considerations, site represents a strong candidate for inclusion in the Local Plan to meet needs for E(g)/B2/B8 uses and attract inward investment. The site could meet</p>

Grade	Definition	Recommendation
		either strategic and/or local needs depending on the scale and nature of the land ultimately allocated and the focus of any development consented.
B+	<p>Site has no large-scale constraints</p> <p>It is well placed, and of a size, to meet local demand</p> <p>It meets defined market needs in a relevant geographic area</p> <p>Site is in developer control, or has other indications of deliverability early in the Plan Period</p>	<p>Subject to other considerations, site represents a strong candidate for inclusion in the Local Plan to meet local needs for E(g)/B2/B8 uses</p>
B-	<p>Site has some, possibly significant constraints, although these can be overcome with investment</p> <p>It is well placed, and of a size, to meet local demand</p> <p>It meets defined market needs in a relevant geographic area</p> <p>Site is in developer control, or has other indications of deliverability early in the Plan Period</p>	<p>Constraints raise some questions over deliverability but there remains a way forward to development if certain issues can be addressed.</p> <p>Subject to other considerations, site represents a strong candidate for inclusion in the Local Plan to meet local needs for E(g)/B2/B8 uses</p>
C	<p>Few/moderate site constraints</p> <p>Site could meet some local demand but:</p> <ol style="list-style-type: none"> 1. Delivery of employment uses would be dependent on development of additional uses, likely housing, in a mixed-use scheme, or 2. Size and position mean that it is most likely to support the growth/relocation of a single firm 	<p>Mostly small scale local sites which would be a low priority for E(g)/B-Class allocation. Additionally:</p> <ol style="list-style-type: none"> 1. If tied to a mixed-use scheme, confirmation that the wider development package is acceptable and deliverable, is required 2. If take up tied to a single firm, it may be preferable to review applications for growth of that firm on a case by case basis through the planning system
D	<p>Site constraints</p> <p>What demand exists primarily for lower value uses – waste, open storage, etc.</p> <p>Conversely, higher demand but likely insufficient to overcome site constraints.</p> <p>Moderate evidence that B-Class uses would be deliverable here in Local Plan Period</p>	<p>Low priority for E(g)/B-Class allocation. Subject to further review may suit other uses.</p>
E	<p>Significant site constraints</p> <p>Location and size offer negligible scope for meeting local demand or supply gaps</p> <p>Significant barriers to delivery</p>	<p>Do not allocate for E(g)/B2/B8 uses.</p>

Source: BE Group, 2024

- 7.4 Six of the 15 sites are proposed for a mixture of residential, likely including some services, and E(g)/B-Class uses. These sites extend up to 448.48 ha each, in size overall and where possible we have used information provided by site promoters to identify the area of land proposed just for local scale E(g)/B-Class employment. Where such information is not available, assumptions have been made about the amount of employment land likely to be realistically provided.
- 7.5 Experience suggests that for a local employment allocation, around 15 ha is the largest site likely. In Charnwood, for example, in the emerging Charnwood Local Plan 2021-37 (currently at Main Modifications Stage) local (not aimed at strategic needs) greenfield employment allocations range from 12-16 ha in the relevant SUEs, and elsewhere (see Table 3, Page 22 of the Draft Plan). Historic allocations in Hinckley and Bosworth have been up to 14 ha in SUE sites. Existing and proposed allocations in Leicester are generally smaller, no more than 7.4 ha reflecting the more constrained nature of the city.
- 7.6 Thus for sites where site promoter information is not available, an indicative figure of 15 ha is provided to illustrate the maximum amount of employment land which might be provided on a local scale site in a greenfield area. Clearly the final amount of local employment land which might be allocated, at any location, will be subject to the full range of site assessments and negotiations with landowners, and their agents, as well as other planning factors.

Table 25 – Call for Sites Site Review Summaries

Ref	Site Name/ Address	Site Description	Site Size, ha	Proposed Use(s) (Net Capacity, where stated (sqm))	Constraints	Market 'Fit'/Supply Gap Filled	Deliverability	Grade
EBLA002	Land off Lutterworth Road	An area of agricultural land, regular in shape, south of Rose Business Park at a main junction of the A426 Lutterworth Road	3.43	Industrial/warehouse	<ul style="list-style-type: none"> Grade 3 predicted Agricultural Land Classification Some land at risk of surface water flooding in the south In Green Wedge 	The site represents a logical growth option for Rose Business Park, an allocated Employment Area which has been a local focus of local development, for a mix of offices and mid-sized industrial/warehouse units, many of which are now in trade use.	Flat, largely unconstrained plot adjacent to an established and growing local industrial estate. The main barrier to development would likely come from Planning Policy, for example, it represents an incursion into the Green Wedge.	B+
EBLA003	Land west of the A426, Blaby (1)	Area of land fronting Rose Business Park, including a nursery and surrounding greenfield land.	4.70	Mixed employment uses (18,330)	<ul style="list-style-type: none"> Some land at risk of surface water flooding in the west, fronting the main road In Green Wedge Trees onsite Children's nursery on the site 	The site represents a logical growth option for Rose Business Park, an allocated Employment Area which has been a local focus of local development, for a mix of offices and mid-sized industrial/warehouse units, many of which are now in trade use. This site (or ELB004) would likely be particularly desirable to developers as it would provide Rose Business Park with much improved frontage onto Lutterworth Road and the A426, close to a major junction. However, there may also be demand to build retail, leisure and trade uses on this main road corridor.	Flat, largely unconstrained plot adjacent to an established and growing local industrial estate. Its development would surround the existing nursery although that use is already effectively part of Rose Business Park and it is likely the nursery would not be retained, were this site to be developed in its entirety. The main barrier to development would likely come from Planning Policy, for example, it represents an incursion into the Green Wedge.	B+
EBLA004	Land west of the A426, Blaby (2)	Area of land fronting Rose Business Park, including a nursery and surrounding greenfield land. Larger version of EBLA003, extending further south into greenfield land.	9.50 (N.B. As ELBA003 falls within this site, only this figure is used within net supply calculations, to avoid double counting)	Mixed employment uses	<ul style="list-style-type: none"> Some land at risk of surface water flooding in the west, fronting the main road In Green Wedge Trees onsite Children's nursery on the site 	As with EBLA003, the site represents a logical growth option for Rose Business Park, an allocated Employment Area which has been a local focus of local development, for a mix of offices and mid-sized industrial/warehouse units, many of which are now in trade use. This site (or ELB003) would likely be particularly desirable to developers as it would provide Rose Business Park with much improved frontage onto Lutterworth Road and the A426, close to a major junction. However, there may also be demand to build retail, leisure and trade uses on this main road corridor.	Flat, largely unconstrained plot adjacent to an established and growing local industrial estate. Its development would surround the existing nursery although that use is already effectively part of Rose Business Park and it is likely the nursery would not be retained, were this site to be developed in its entirety. The main barrier to development would likely come from Planning Policy, for example, it represents an incursion into the Green Wedge. At 9.50 ha its development would represent a significant increase in the size of Rose Business Park, which is presently 2.91 ha. However, the larger site would also allow the delivery of a greater range of employment premises, including some larger B2/B8 options, which are also needed by the market.	B+
EAST001	Land west of the M69, Junction 2	Agricultural land south west of Junction 2, M69, bounded by the B4669 in the north and Aston Lane in the south. Includes a large pond.	20.00	Industrial/warehouse	<ul style="list-style-type: none"> Large pond on the site Trees onsite Housing adjacent Grade 3 predicted Agricultural Land Classification 	The land has a prominent position at a motorway junction and is close to several large B2/B8 schemes, around the M69/A5 Interchange which have seen extensive investment in recent years. This site would be a	As the DCO for the Hinckley National Rail Freight Interchange has now been refused, due to its negative impact on highways safety at several adjoining locations, this site might provide a smaller and lower impact	A-

Ref	Site Name/ Address	Site Description	Site Size, ha	Proposed Use(s) (Net Capacity, where stated (sqm))	Constraints	Market 'Fit'/Supply Gap Filled	Deliverability	Grade
					<ul style="list-style-type: none"> Includes areas at risk from surface water flooding Overhead lines and pylons cross the south east of the site Woodland to the north is a SSSI and Ancient Woodland which partly falls into a Local Nature Reserve – Burbage Common and Woods Country Park 	<p>logical location for larger industrial and warehouse units, for which there remains reasonable demand both locally and regionally.</p> <p>If this site was progressed to meet local needs, then the requirement would be before industrial and warehouse units of sub-5,000 sqm each, reflecting demand. Such a location on a Motorway junction would be popular with businesses which require prominence and strategic road access. However, in terms of economic benefits, the site links more closely to the main settlements of Hinckley and Bosworth than Blaby District.</p>	<p>alternative. For comparison, this site could deliver some 80,000 sqm of floorspace at a 40 percent site coverage, against the up to 850,000 sqm proposed for the Rail Freight Depot. A detailed, transport assessment would thus be needed to confirm that this far smaller option would avoid the issues raised by the Rail Freight Depot. Other studies would also need to confirm that the other site constraints, noted here, would not represent significant barriers to delivery and clarify the net developable area, after mitigation.</p> <p>Subject to these issues, the experience of the National Rail Freight Interchange suggests that this would be a desirable location for a B2/B8 scheme, of local or strategic scope, building on its motorway position and reflecting similar developments further west on the M69 and extending along the A5.</p>	
ELUB002	Land East of Narborough Wood Park	Regularly shaped area of agricultural land, north east of Narborough Wood Park.	7.20	Offices	<ul style="list-style-type: none"> Grade 3 predicted Agricultural Land Classification Narrow access to the wider Narborough Wood Park Some land at risk of surface water flooding in the south 	Narborough Wood Park is a popular and successful rural office scheme, serving a wide catchment. Market demand is increasingly focused on smaller, flexible office suites which better allow modern flexible working practices while stakeholders report that office demand in rural areas of Blaby District frequently exceeds that in more urban areas. This is evidenced by the fact that Narborough Wood Park is nearly fully occupied, indicating a lack of capacity in the existing scheme.	The site is largely unconstrained. There can be viability constraints in delivering offices, but the expansion of an existing scheme would likely be more achievable, particularly if at least some occupiers have been identified for the space. The biggest barrier to development is likely to be the existing access to Narborough Wood Park, a single track road which could not support a significant increase in traffic.	B-
EWHE001	Land off Enderby Road	Regularly shaped area of agricultural land, on the edge of the Whetstone settlement area, with some houses adjoining it in the west.	1.67	Mixed employment uses (6,513)	<ul style="list-style-type: none"> Housing adjacent Grade 3 predicted Agricultural Land Classification Includes areas at risk from surface water flooding Grade II Whetstone Grange to the south In Green Wedge 	<p>The site is located close to Enderby Road Industrial Estates and Grange Business Park, Whetstone, two successful local schemes, the former of which has seen some recent investment in new premises.</p> <p>The site is comparatively small but would be large enough to support a small scheme of industrial units of less than 1,000 sqm each, which stakeholders report to be a main area of local demand.</p>	<p>Applications for both housing and smaller industrial units have been refused here, most consistently on impacts on the Green Wedge and on the Grade II Listed Whetstone Grange, to the south – App. 20/1346/FUL (employment) and 16/1085/FUL (housing, refused at appeal).</p> <p>Unless it can be shown that these previous grounds for refusal can be addressed, this site does not appear deliverable for relevant uses.</p>	E

Ref	Site Name/ Address	Site Description	Site Size, ha	Proposed Use(s) (Net Capacity, where stated (sqm))	Constraints	Market 'Fit'/Supply Gap Filled	Deliverability	Grade
GLE031	Western Park Golf Course	Large golf course, south east of Optimus Point, and north of Braunstone Frith Industrial Estate, Leicester, with housing to the north and east and a potential access at Kirby Lane in the west.	0.73 of employment land on a total site of 73.11 (20.21 in Blaby, the rest in Leicester)	Mixed use and residential Site promoter estimates approximately 330 residential units and 0.73 ha of employment land within Blaby District	<ul style="list-style-type: none"> Includes areas at risk from surface water flooding Trees on site Blaby District area of the site is in the Green Wedge 	This site enjoys a very strong position between Optimus Point, which is nearing completion having attracted a range of major employers to large B2/B8 units, and Braunstone Frith Industrial Estate, Leicester's prime industrial employment area which has also seen considerable recent investment. The site's strong links to the M1 and A46, and adjoining uses, would make this a desirable location for B2/B8 units of up to 5,000 sqm, the focus of local demand.	Leicester City Council owns the whole site, including the portions in Blaby District. The City Council is actively progressing its portion of the site through its Local Plan, which recently completed Examination in Public with no significant issues for this site. The City Council indicate that the site will require an allowance for ecological mitigation, but its portion could still deliver some 32,000 sqm of floorspace. Most of the land is owned by the City Council, allowing the public sector to lead on any scheme. Development on the City Council land would provide a strong precedent for expansion into Blaby District, its development would require the removal of the Green Wedge designation in the Local plan, however.	A-
GLE032	Land north of Glenfield	Large area of agricultural land, extending north from Glenfield to the A46 Leicester Western Bypass. The site is located north east of Mill Lane Industrial Estate and adjoins other housing in the east.	7.00 of employment land (assumed to be all falling into Blaby District, close to the existing Mill Lane Industrial Estate) on a total site of 74.34 (51.50 in Blaby, the rest in Hinckley and Bosworth)	Mixed use and residential Site promoter estimates 900 dwellings and 7 hectares of employment land for whole site.	<ul style="list-style-type: none"> Grade 3 predicted Agricultural Land Classification Includes areas at risk from surface water flooding Rothley Brook, to the south and east includes areas of high flood risk Trees on site Public right of way crosses the centre of the site north to south Overhead lines and pylons cross the south east of the site Blaby District area of the site is in the Green Wedge 	Although Mill Lane, a well-functioning and popular local industrial estate, is the closest industrial scheme, it is the links to Optimus Point which would make it most desirable. The land is well located on several strategic routes and close to a M1 Junction. It could be popular with local industrial occupiers, for units of up to 5,000 sqm each. However, this would depend somewhat on the level of prominence the site enjoyed and how simple access back to M1 was (for example, would access be through the existing Mill Lane Industrial Estate, a separate access or through a wider housing scheme).	Site constraints, including Flood Risk and pylons, would reduce the net developable area and it would need to be confirmed that the 7 ha identified for employment was ultimately developable. If this was not the case, 7 ha would need to be found elsewhere in the wider 74 ha site. Subject to this, however, experience at Optimus Point shows that B2/B8 units, in a range of sizes, are deliverable in this area.	A-
BLA034	Land at Hospital Lane, Blaby	A range of agricultural plots, falling east and west of Countesthorpe Road, south of the River Sence and the Grand Union Canal, which separate the plots from the nearest settlement, South Wigston.	2.50 of employment land on a total site of 98.78 (81.88 in Blaby, the rest in Oadby and Wigston)	Mixed use and residential The site promoter indicates a mixed use scheme of 1,500 – 2,000 dwellings, 10,000sqm of employment floorspace (equating to 2.50 ha at 4,000 sqm/hectare) and 5,000 sqm retail floorspace	<ul style="list-style-type: none"> Trees on site Includes several homes Includes areas at risk from surface water flooding Mixed Grade 3 and 4 predicted Agricultural Land Classification North of the site is in Flood Zones 2/3 Multiple pylons and overhead lines cross the site 	This site is distant from strategic transport routes and existing employment areas within Blaby District, while road connections to nearby settlements such as Blaby are narrow and may not support a big increase in HGV traffic. The land links well to Oadby and Wigston, but demand in that District does not appear to support a large development here, as discussed in relation to the FEMA. Thus, while there is some demand for industrial and warehouse units, of less than	The site has some significant constraints including electricity pylons, flood risk and likely some limits on road capacity which will significantly reduce the net developable area and could render the whole location undevelopable.	E

Ref	Site Name/ Address	Site Description	Site Size, ha	Proposed Use(s) (Net Capacity, where stated (sqm))	Constraints	Market 'Fit'/Supply Gap Filled	Deliverability	Grade
						5,000 sqm each across the district, this site would be a low priority for developers and businesses, compared to the other options put forward.		
WHE031	Land south of Whetstone	Area of agricultural land, extending south from Whetstone to Countesthorpe Road and east of the M1. Includes one large farm.	4.00	Industrial/warehouse. Mixed use and residential The site promoter estimates 660 to 880 dwellings, 4 ha of employment floorspace, primary school and community facilities	<ul style="list-style-type: none"> Trees on site One large farm on the site Housing adjacent Grade 3 predicted Agricultural Land Classification Includes areas at risk from surface water flooding Whetstone Brook to the east, includes areas of high flood risk 	The site links to the Cambridge Road and Whittle Estate employment areas to the north. Both are well occupied and successful, with the Whittle Estate, being a focus for advanced manufacturing investment into Blaby District. Further growth of these locations would be desirable to the market. However, consideration would need to be given as to how this site could link to Cambridge Road and benefit from the critical mass of existing premises. At present, access is through the residential areas in the south of Whetstone.	The physical constraints will not significantly inhibit development, if land in an area of Flood Risk is excluded. However, only a small portion of the site appears to be proposed for E(g)/B-Class employment. Most of it is likely to be for housing as evidenced by the consent now being sought for 68 homes on land in the north east (App. No. 24/0869/FUL). Thus, this site firstly needs to be considered on its merits as housing location.	C
WHE027	Whetstone Pastures	Very large area of greenfield, agricultural land in the south of Blaby District, extending east and west of the M1 and A426, and distant from any settlement.	Proposals include a logistics park of 372,000 which equates to 93 ha at 4,000 sqm/hectare for B8 uses Total: 448.84 (379.84 in Blaby, the rest in Harborough) A local employment site of no more than 15 ha is assumed here.	Warehouse Mixed use and residential (372,000)	<ul style="list-style-type: none"> Trees on site Farms on the site One building in the area Whetstone Pastures Residential Homes is Grade II Listed Grade 3 predicted Agricultural Land Classification Includes areas at risk from surface water flooding Areas of land in Flood Zones 2/3, in the east The adjacent settlement of Willoughby Waterleys is mostly a Conservation Area Various Public Rights of Way cross the site 	Proposals are for a logistics park, which would fall into one of the Key Areas of Opportunity (AO6) for strategic sites, as identified in the county-wide logistics studies. If a local employment site was proposed here, it would likely fall in the west of the site, on the A426 Lutterworth Road. The site is presently rural and distant from the existing settlements of Blaby District and M1 Junctions but would benefit from an A-Road position between Lutterworth (inc. Magna Park and Junction 20, M1) and Blaby/Whetstone. This could be attractive to industrial and smaller logistics businesses who want to be on the strategic road network, centrally located in the county, but do not have to be in an immediate settlement area (or may prefer not to be because of the nature of their operations). Clearly if a larger housing scheme and/or strategic logistics park was also provided here it would boost the critical mass of companies and workers in the immediate location, as well as providing for transport options other than the private car.	Proposals here are for a new Garden Village, albeit one with a sizable employment site associated with it. Thus, any scheme here is likely to be housing led and firstly needs to be considered against housing needs. The site promoters are seeking strategic logistics scheme here and the scheme is supported by Tritax Big Box. Tritax specialise in strategic scale B2/B8 but have produced more local units in the 900-2,500 sqm range, for example at Gatwick Gate Industrial Estate, Crawley. A local scale employment development, in the west would avoid many of the constraints highlighted. However, the A426 appears relatively narrow here and it would need to be confirmed that the road could support the HGV traffic generated, and what level of infrastructure investment would be needed.	A-
STO026	Land West of Stoney Stanton	Very large area of greenfield, agricultural land, falling between the M69 in the east and Stoney Stanton in the west, north east of Junction 2, M69	A local employment site of no more than 15 ha is assumed here.	Mixed use and residential Site promoter indicates a strategic development of around 5000 houses plus employment land,	<ul style="list-style-type: none"> Trees on site Farms on the site Grade 3 predicted Agricultural Land Classification 	The land has a prominent position at a motorway junction and is close to several large B2/B8 schemes, around the M69/A5 Interchange which have seen extensive investment in	As the DCO for the Hinckley National Rail Freight Interchange has now been refused, due to its negative impact on highways safety at several adjoining locations, this site might provide	A-

Ref	Site Name/ Address	Site Description	Site Size, ha	Proposed Use(s) (Net Capacity, where stated (sqm))	Constraints	Market 'Fit'/Supply Gap Filled	Deliverability	Grade
			Total 280	primary and secondary schools, and associated infrastructure	<ul style="list-style-type: none"> Includes areas at risk from surface water flooding Various Public Rights of Way cross the site Overhead lines and pylons cross the site north to south 	<p>recent years. This site would be a logical location for larger industrial and warehouse units, for which there remains reasonable demand both locally and regionally.</p> <p>If this site was progressed to meet local needs, then the requirement would be before industrial and warehouse units of sub-5,000 sqm each, reflecting demand. Such a location on a Motorway junction would be popular with businesses which require prominence and strategic road access. However, in terms of economic benefits, the site links more closely to the main settlements of Hinckley and Bosworth than Blaby District</p>	<p>a smaller and lower impact alternative. For comparison, this site could deliver some 60,000 sqm of floorspace at a 40 percent site coverage, against the up to 850,000 sqm proposed for the Rail Freight Depot. A detailed, transport assessment would thus be needed to confirm that this far smaller option would avoid the issues raised by the Rail Freight Depot. Other studies would also need to confirm that the other site constraints, noted here, would not represent significant barriers to delivery and clarify the net developable area, after mitigation.</p> <p>Subject to these issues, the experience of the National Rail Freight Interchange suggests that this would be a desirable location for a B2/B8 scheme, of local or strategic scope, building on its motorway position and reflecting similar developments further west on the M69 and extending along the A5.</p>	
EELM001	Land north of Junction 2, M69 (Elmesthorpe Parish)	Very large area of greenfield, agricultural land, comprising the site of the Hinckley National Rail Freight Interchange, bounded by the M69 in the east and the railway line in the north, located north west of Junction 2, M69.	15 (Reduced from 224 in the Hinckley National Rail Freight Interchange submission, see the comments in the Market Fit and Deliverability columns)	Mixed B-Class (639,400 originally proposed)	<p>Constraints for the full area are covered in the DCO application. If a smaller 15 ha site was proposed, close to Junction 2, M69, the constraints would be:</p> <ul style="list-style-type: none"> Caravan site and stables adjacent Farm on site Trees on site Ancient Woodland adjacent, surrounding Castlewood Park. Burbage Common and Woods Country Park, Local Nature Reserve to the west Includes areas at risk from surface water flooding Smithy Lane is a Public Right of Way 	<p>The fact that the Hinckley National Rail Freight Interchange was proposed here shows that the location is of interest to strategic B2/B8 operators and developers, and the land remains under option to developer partners.</p> <p>A smaller site here, 15 ha accommodating some 60,000 sqm, would attract a more limited range of smaller scale operators, but the location, off the M69 between the M6 and M1 would still be very desirable to industrial and warehouse companies seeking an East Midlands location outside of urban areas. However, in terms of economic benefits, the site links more closely to the main settlements of Hinckley and Bosworth than Blaby District</p>	<p>The Hinckley National Rail Freight Interchange was refused by the Secretary of State for Transport on 10th March 2025, due to its negative impact on highways safety at several adjoining locations. Assuming the original scheme will not be revised then a smaller site of some 15 ha could be considered here. This would need to be as close to Junction 2, M69 as possible to take advantage of the strategic location and be attractive to B2/B8 occupiers. While a smaller site would hopefully avoid some of the traffic impacts of the National Rail Freight Interchange it will still face constraints from the adjacent caravan park and Ancient Woodland. It would also need to be clear how it would access Junction 2 and if that access can be viably delivered. It would thus need to be confirmed that all these issues could be addressed before any allocation was made here. Conversely, two alternatives have been put forward around Junction 2, M69 - EAST001: Land west of the M69, Junction 2, STO026: Land West of Stoney Stanton.</p>	A-

Ref	Site Name/ Address	Site Description	Site Size, ha	Proposed Use(s) (Net Capacity, where stated (sqm))	Constraints	Market 'Fit'/Supply Gap Filled	Deliverability	Grade
ETHU001	Thurlaston Saw Mill	Small brownfield site, including a large industrial building occupied by Silvan Floors, north east of Thurlaston.	1.40	Industrial/warehouse.	<ul style="list-style-type: none"> One house adjacent 	<p>Active local employment area, with a single occupier at present, but with a unit and yard large enough to meet a range of local scale E(g)/B-Class options, if it became vacant.</p> <p>ET1 Sawmill, Thurlaston is identified under Policy FV15: 'Employment Areas' of the Fosse Villages Neighbourhood Plan: Update (2018-2029) to be safeguarded for E(g)/B-Class development.</p>	The site appears to be in active employment use at present, but redevelopment of the main unit would provide a sizable rural employment site.	C
ESHA001	Aston Lane, Sharnford	Area of agricultural land, north of John Brindley Commercials and north west of Sharnford.	14.06	Industrial/warehouse. A range of building sizes to provide employment space for John Brindley and several tenants. (Approximately 21,600 sqm for B2 and B8 uses and up to 5,400 sqm of Use Class E floorspace)	<ul style="list-style-type: none"> Grade 3 predicted Agricultural Land Classification Parts of the east of the site are at risk for surface water flooding Overhead lines and pylons cross the site diagonally from north east to south west. 	A rural site in a reasonable location next to John Brindley Commercials and proposed, at least in part, to allow the growth of that business and other tenants. The existing John Brindley Commercials site already accommodates several local businesses and has consent for further growth, establishing it as a key source of affordable workshop space in the west of the district. There remains good demand for rural workspace, which this site can capitalise on.	The pylons crossing the site split it in half, but deliverable land remains on either site. The most deliverable use here would be industrial and warehouse units, expanding on the existing offer to the south and aimed at supporting the rural economy. The site was submitted by John Brindley Commercials who aspire to expand north onto this land but also providing growth space for other firms.	B-
		Total	116.49 (Employment land falling within Blaby District. See assumptions on individual sites)					

Source: BE Group, 2024

- 7.7 Reflecting the assumptions set out in Table 25, the 15 sites could provide up to 116.49 ha of local employment land, assuming maximum likely delivery on all sites.
- 7.8 Within those 15 options, sites graded A+-B- can be said to represent the best options for employment land supply, measured against market and deliverability criteria. Within these sites, the following can be noted:
- No sites received an A+ grade meaning they were strategic and/or local level options with limited constraints which could be made available almost immediately, subject to planning.
 - Six sites were Graded A-, in that they have the potential to be developed to meet strategic and/or local needs but there is more uncertainty in deliverability, more constraints to overcome and they require greater infrastructure investment. They total **72.73 ha (gross) of land specifically identified for E(g)/B-Class employment and include:**
 - Three sites, totalling 50.0ha, or up to 15-20.0 ha each, are located at Junction 2, M69 – EAST001: Land west of the M69, Junction 2, STO026: Land West of Stoney Stanton and EELM001: Land north of Junction 2, M69 (Elmesthorpe Parish). They represent smaller scale alternatives to the Hinckley National Rail Freight Interchange, which are likely to have more limited physical impacts, particularly on the local transport network. However, they still have a range of constraints which need to be understood before any Local Plan allocation could be progressed. Additionally, these sites are distant from the main settlements of Blaby District
 - GLE031: Western Park Golf Course (0.73 ha) falls primarily into Leicester and its allocation, for employment uses, is actively being progressed by the City Council. Some delivery here, likely extending in to Blaby District is thus very likely
 - WHE02: Whetstone Pastures (assumed 15 ha max for a local site) proposes a strategic scale employment site within a new Garden Village. Such development would be housing led and would thus firstly need to be assessed against housing needs. A local employment site could be delivered, in the west, but present stated interest is for a large logistics park This is likely also true for GLE032: Land north of Glenfield (7.0 ha). WHE02: Whetstone Pastures is well located close to the M1 but would need very significant infrastructure investment to realise, likely a new M1 Junction

- In the context of Leicestershire, such options might better meet strategic logistics needs, which are the subject of the separate and ongoing Leicester and Leicestershire: Strategic Distribution Floorspace Needs Update and Apportionment Study. However, this at least identifies which locations may fall into this category
- **34.19 ha** in five sites, graded B+/B-, represents good quality land which could meet more local needs. These are – EBLA002: Land off Lutterworth Road (3.43 ha), EBLA003/EBLA004: Land west of the A426, Blaby (9.50 ha max), ELUB002: Land East of Narborough Wood Park (7.20 ha), ESHA001: Aston Lane, Sharnford (14.06 ha). They comprise greenfield expansion sites to existing Employment Areas.

7.9 Ultimately, **106.92 ha** of land specifically identified for E(g)/B-Class employment is potentially available in the options graded A+ to B-. However, most sites would represent primarily greenfield developments, often close to features of landscape/ecological value and including land in flood risk and would be subject to planning and other considerations.

Summary

7.10 BE Group has reviewed 15 sites, as identified through Call for Sites, etc where E(g)/B-Class employment uses were proposed, either individually or as one of several possible uses. These have been appraised and graded A-E, as defined in Table 24 above, with assumptions made about the amount of employment land large mixed-use sites can realistically provide.

7.11 Table 26 summarises the 15 opportunity sites by each of the above grades. Sites suitable for further consideration in the Local Plan Process are graded A+ to B-, and Grade C sites where they could help to meet local needs and support sustainable communities.

Table 26 – Site Submissions Appraisal by Category

Category	Number of Sites	Land Supply, ha*	Sites Included
A+ Unconstrained/Limited Constraints – Strategic/Local Development Options	-	-	-
A-	6	72.73	<ul style="list-style-type: none"> • EAST001: Land west of the M69, Junction 2 – 20.0 ha

Category	Number of Sites	Land Supply, ha*	Sites Included
Constrained – Strategic/Local Development Options			<ul style="list-style-type: none"> • GLE031: Western Park Golf Course – 0.73 ha • GLE032: Land north of Glenfield – 7.0 ha • WHE02: Whetstone Pastures – 15.0 ha (max) • STO026: Land West of Stoney Stanton – 15.0 ha (max) • EELM001: Land north of Junction 2, M69 (Elmesthorpe Parish) – 15.0 ha (max)
<u>B+/B-</u> Unconstrained/Limited Constraints or Constrained – Local Development Options	5	34.19	<ul style="list-style-type: none"> • EBLA002: Land off Lutterworth Road – 3.43 ha • EBLA003: Land west of the A426, Blaby (1) – 4.70 ha (falls within ELB004) • ELB004: Land west of the A426, Blaby (2) – 9.50 ha • ELUB002: Land East of Narborough Wood Park – 7.20 ha • ESHA001: Aston Lane, Sharnford – 14.06 ha.
<u>C</u> Local Scale Mixed Use Sites/Proposed to Meet Specific Business Needs	2	5.40	<ul style="list-style-type: none"> • WHE031: Land south of Whetstone – 4.00 ha • ETHU001: Thurlaston Saw Mill – 1.40 ha.
<u>D</u> Limited suitability for B-Class Uses	-	-	-
<u>E</u> Unlikely to be deliverable development site	2	4.17	<ul style="list-style-type: none"> • EWHE001: Land off Enderby Road – 1.67 ha • BLA034: Land at Hospital Lane, Blaby – 2.50 ha.
TOTAL	15	116.49	

Source: BE Group, 2025

*Land specifically identified for E(g)/B-Class employment uses.

7.12 Ultimately, 106.92 ha of employment land supply is potentially available in the options graded A+ to B-. However, most sites would represent mostly greenfield developments, often close to features of landscape/ecological value and including land in flood risk and would be subject to planning and other considerations.

8.0 CONCLUSIONS

Introduction

- 8.1 This study has included a wide-ranging look at the factors affecting Blaby District's local economy, with reference to those that are likely to affect the future need for land and property within the district. It does not review consider strategic employment land needs, especially for B8 logistics which is the subject of separate and ongoing research. This section draws together the main issues that will need to be addressed in support of the recommendations set out in Section 9.0.

Policy and Strategy

- 8.2 The study has been undertaken in line with both the National Planning Policy Framework (2024) and relevant Planning Practice Guidance.
- 8.3 The 2020 Use Classes Order Amendment combines the B1 Office/Research/Light Industrial Uses along with the A and partly D1/ D2 uses into a single 'E' Use Class. For Blaby District, the practical effects of this are likely to include some greater pressure to convert town centre offices to other uses, although the market for many of those alternative uses is suppressed at this time. The Use Class change has no spatial considerations and therefore will apply outside of town centres as well. It thus has the potential to result in the introduction of non-office/non-industrial type activities, including retail, in out of centre business parks, and industrial estates, although this is a trend which has been ongoing for some time and can, in moderation, beneficially diversify local economic activity.
- 8.4 Large scale conversions of office and industrial uses are unlikely in modern industrial estates/business parks which are well occupied, still meeting business needs and generating a reasonable return for owners. As noted, in Section 5.0, only 17 of 553 premises in the 26 Employment Areas reviewed were in uses other than E(g)/B-Class employment. This is only slightly increased on the position in 2011

- 8.5 The ‘Warehousing and Logistics in Leicester and Leicestershire: Managing Growth and Change study (2022) identified logistics needs, net of supply, of 768,000 sqm or 307 ha was identified for rail-served needs and 392,000 sqm or 112 ha for road (non-rail) need, to 2041. The M69 and adjacent rail links are identified as areas of opportunity for rail and road connected sites. The M1 Corridor, extending south from approx. Narborough, into Harborough, is identified for road linked logistics.
- 8.6 Thus, even without the Hinckley National Rail Freight Interchange, which has been refused at Inquiry, something discussed in Section 5.0, it is likely that Blaby District will be asked to meet some of Leicester and Leicestershire’s logistics needs. However, a revised version of the Logistics Study is under production, at the time of writing, which may alter the overall needs and areas of search for supply.
- 8.7 The latest Leicester and Leicestershire HENA (2022) utilised a mixture of Labour Demand and Past Take Up modelling to identify needs of 38.0-60.5 ha for the three forecast periods (see Table 27).

Table 27 – Blaby District Employment Land Needs 2021-2036, 2041 and 2050, ha

Forecast Period	Premises Type: Offices incl. R and D	Premises Type: Industrial and Distribution	Premises Type: All Employment Land
2021-2036	9.1	29.0	38.0
2021-2041	11.4	34.7	46.1
2021-2050	15.5	45.0	60.5

Source: Leicester and Leicestershire Authorities, 2022

- 8.8 This Study provides a Blaby District specific update to the HENA and, where possible, utilises a forecast methodology consistent with that used in the multiple HENA Studies completed since 2017. Specifically, this Study also utilises a Labour Demand model to project office needs, based on Cambridge Econometrics forecasting, and a Past Take Up based model to project industrial and warehouse requirements, excluding take up of strategic premises larger than 9,000 sqm.

- 8.9 The 2024 based Cambridge Econometrics forecast, utilised for this Blaby Employment Land and Premises Study is clearly less positive about future jobs growth than that used in the 2022 HENA, as this latest Study suggests no need for office land, compared to needs of 9.1-15.5 ha in the HENA. This likely reflects greater national economic uncertainty today, than was true in 2021-2022, resulting in more cautious jobs growth forecasts.
- 8.10 The projections for industrial and warehouse need are also somewhat lower in this Study than in the HENA, with the HENA suggesting that Blaby District will need 1.7-1.9 ha/year of land against 1.22 ha/year in this Study. One reason for this is that Blaby District has seen lower rates of take up since 2019, than was true in the preceding decade. This lower rate of recent completions will be better reflected in the Take Up modelling in this most recent Blaby Employment Land and Premises Study.

The Functional Economic Market Area

- 8.11 Based on evidence on services, infrastructure and commuting data the FEMA of Blaby District includes all of Leicester and Leicestershire apart from Melton. Blaby District also has strong commuting links with West Northamptonshire along the M1 and A5 Corridors. The other areas of the Midlands, including neighbouring parts of Warwickshire, have more limited relationships with Blaby District. The main overlapping issues with Blaby District are identified in the Table 28 below.

Table 28 – FEMA Issues Summary

Area	Comments
Leicestershire - Charnwood	A range of larger schemes are proposed, most of which link to the Leicester Principal Urban Area and to Loughborough and so interrelate and compete with equivalent schemes in the east of Blaby District. If brought forward, Loughborough Science Park would meet science and technology requirements from across Leicester and Leicestershire, however, there has been no delivery here, to date and full take up of the 73 ha of allocated land will likely be a long term prospect. Charnwood Council also agreed to take 23 ha of Leicester's need, and this is the only external employment land Leicester City requires to support its emerging Local Plan. There is no further requirement of Blaby to address.
Leicestershire - Harborough	The strongest link to Harborough is Magna Park, Lutterworth, an established strategic scale B8 logistics scheme which will provide considerable competition to equivalent schemes across Leicester and Leicestershire. In the short term Magna Park has further growth potential, in the longer term it is close to capacity, opening opportunities elsewhere. Also, its existence has clearly not prevented logistics sector growth elsewhere along M1 Corridor.
Leicestershire – Hinckley and Bosworth	Hinckley and Bosworth has seen the development of new strategic B2/B8 units at Bardon and around the A5/M69 Junction, but that is now complete.
Leicester	Blaby District has very strong linkages with Leicester, with 18,418 commuter movements recorded between the two locations in 2021. Leicester is a long established centre of the office market in the East Midlands, both in terms of the City Centre generally and the associated high

Area	Comments
	<p>tech centre of Pioneer Park. Historically, that market has extended west to include Grove Park, supporting businesses that need more direct access to the motorway corridors. Overall, this will not change, limiting the capacity for private sector office sector growth in the surrounding county. Recent years have seen the successful development of some Grade A suites in the City Centre, boosting confidence about future growth. The overall net gain of stock is still expected to be modest though, and it remains to be seen if equivalent gains on the periphery of the Leicester Principal Urban Area are possible.</p> <p>Leicester has further employment land needs which cannot be met inside the city boundary. As mentioned, it is expected that these needs will be met within Charnwood.</p>
Leicestershire - North West Leicestershire	<p>North West Leicestershire has been a historic focus for strategic B8 development in the county. While existing B2/B8 schemes here are now largely full, North West Leicestershire retains considerable long term growth capacity, most notably at East Midlands Airport where 81 ha (gross) is available as part of the East Midlands Freeport. As other strategic schemes in the sub-region reach capacity, this area will likely be the main competition for equivalent logistics schemes in Blaby District, long term.</p>
Leicester – Oadby and Wigston	<p>Cross boundary movements between Oadby and Wigston and adjoining areas of Blaby District are well established. Oadby and Wigston’s existing employment areas are generally of the local scale, however and are likely to see negligible growth moving forward.</p>
West Northamptonshire	<p>As Northampton is some distance from Blaby District the main overlapping strategic feature will be Daventry International Rail Freight Terminal (DIRFT), located at Junction 18, M1 and connected to the A5, which sits south east of Rugby. The existing three phases of DIRFT employ over 10,000 people with DRIFT III now proposed on land east of the M1. A major rail linked facility, its main competition in Leicester and Leicestershire is the SEGRO Logistics Park East Midlands Gateway, North West Leicestershire.</p>

Source: BE Group, 2024

Property Market Assessment

Industrial/Warehouse Market

- 8.12 Regionally, the market for larger industrial and warehouse stock remains strong and there is a lack of modern, high grade buildings to meet needs. Conversely there is an oversupply of older, second hand units. Supply shortages are encouraging business to refurbish or expand their existing units.
- 8.13 In Leicester and Leicestershire, the investment market in the west of the city and county has been dominated by the logistics sector. This boom has delivered growth to Blaby District, supporting the fast take up of Optimus Point and the New Lubbethorpe Strategic Employment Site, although their remain shortages for local firms, particularly for grow on space and freehold options. Another growth area, with demand more evenly spread across Leicester and Leicestershire, is advanced manufacturing industries, including green sector businesses. Companies in such sectors typically want 2,000-3,000 sqm units, but smaller high tech properties are also popular and achieving high rents. Related to this is growth in the science sectors, although demand here is focused on Leicester and Leicestershire’s Science Parks, which fall outside of Blaby District.

- 8.14 In terms of local employment, Manufacturing had a modest role locally, employing 5,000 in 2022, or 7.8 percent of local employment. Manufacturing jobs numbers have grown over the last decade but the equivalent increase in the number of businesses has been limited, suggesting the growth reflected the expansion of existing firms rather than incomers to the district, so is not likely to generate large numbers of additional property requirements (although some local firms may need larger property options, if they are expanding).
- 8.15 By comparison Construction and Transport and storage did see growth in both business numbers and, in the case of Construction, jobs. This growth will generate premises needs, particularly for B8 options, in a range of sizes.
- 8.16 In Blaby District, for the last decade at least, vast majority of market activity was for sub-5,000 sqm units, and particularly units of 201-500 sqm and 1,001-5,000 sqm. Three quarters of the recorded deals were leasehold. Average rents fluctuated somewhat but reached a decade peak of £8.96/sqft (£96/sqm) in 2020, before reducing in 2021. Rents now stand at £7.90/sqft (£85/sqm). The high average rents also suggest that Blaby District does not have a significant problem with lower grade industrial stock.
- 8.17 Stakeholders report good local demand for leasehold premises of 300-700 sqm and freehold premises of up to 1,000 sqm to allow local business growth. Such demand is found across the district but is focused on the main transport routes.
- 8.18 Demand for larger industrial and warehouse premises is focused on the M1 Corridor generally and on Meridian Business Park more specifically. In the north and west of Maridian there is a healthy market for larger units of 15,000-30,000 sqm both from existing large employers and investors who may be looking across the Leicester Conurbation. The quality of the local stock, in Blaby District, is generally good and there are no employment areas where low grade stock is a particular issue

Office Market

- 8.19 Hybrid working practices are encouraging businesses to review their office property holdings. Where companies are seeking space in 2024, there is a much greater focus on buildings that are sustainable and energy efficient.

- 8.20 There is also a strong demand for serviced and co-working space from established businesses that wish to lease short-term space. While little new Grade A stock, is being developed, or becoming available, within the East Midlands, this need is being met in good quality second-hand stock, increasing the confidence of landlords that refurbishments of older properties will be repaid by swift lettings. Conversely, low grade offices are increasingly surplus to requirements and being converted to other uses.
- 8.21 In terms of offices, Blaby District generally forms part of the common market area with Leicester and has historically been successful at attracting major employers to schemes like Grove Park. Today, however, both Blaby District and the city locations lack the Grade A space to compete with cities such as Nottingham for such uses, while viability is a barrier to further development. Even in a recovering market, the development of large scale new offices is unlikely to be viable anywhere in Leicester and Leicestershire, without public sector support.
- 8.22 In 2022, 21,000 staff or nearly a third of the workforce were employed in private office sectors locally, particularly professional services. Key office sectors are growing in terms of jobs, but again the gain in business numbers is limited suggesting premises requirements will be modest. The exception is the Financial and insurance sector which lost both jobs and businesses, over 2015-2022, suggesting that this is a sector in local decline. Forecasting, completed for this study also suggests that Blaby District will continue to lose financial services labour over the Local Plan period.
- 8.23 In Blaby District most market transactions were for sub 500 sqm units, and particularly sub 200 sqm properties. Larger deals were rarer but occupational transactions for up to 8,000 sqm of office space have occurred. Average rents reduced noticeably in 2022 and 2023, but do seem to have recovered in 2024, with an average of £16.39/sqft (£176/sqm) recorded, the peak of the decade.
- 8.24 The local office market has improved significantly since the end of the Covid-19 Pandemic and associated Lockdowns. Businesses have a clear idea about the quantum of space they need, releasing surplus space but also seeking out higher grade alternatives.

8.25 Blaby District has a good offer of modern premises, in very accessible locations around Enderby and Braunstone Town. There has been little recent growth in the offer in Blaby District which might attract new businesses and allow existing businesses to grow. As elsewhere, the prospects of significant new development remain modest, and it is more likely business needs will be met through the refurbishment and remodelling of stock. As businesses practicing hybrid working generally require smaller suites, there are now opportunities to increase the density of office units. Local firms generally require suites of up to 500 sqm while larger businesses will frequently invest in a more substantial, freehold/long leasehold property of up to 2,000 sqm.

The Rural Property Market

8.26 In terms of the industrial market, demand is for local scale for leasehold premises of 300-700 sqm and freehold premises of up to 1,000 sqm, as is true elsewhere in the district. As most of Blaby District's rural areas have reasonable main road access, demand extends much further into the countryside than might be true elsewhere.

8.27 Rural stock is relatively accessible, including via bus routes, and the more rural settlements in the west of the district, including Stoney Stanton, Sharnford and Croft, as well as Cosby in the east, have at least one industrial estate (many identified in the Fosse Villages Neighbourhood Plan: Update (2018-2019)). These serve broad rural catchments and meet a lot of needs. Their availability means there tends to be less pressure for farm conversions, which tend to only meet requirements for affordable storage space which is not available in the larger industrial estates.

8.28 However, there are still unmet requirements across the district and a need for a pipeline of development, particularly in rural areas where less development has happened recently.

- 8.29 Stakeholders also report a healthy rural demand for smaller offices, generally smaller than 200 sqm each. This is also true in the other Leicestershire authorities, with markets extending across boundaries, overlapping between Blaby District, Hinckley and Bosworth and Harborough. Blaby District is reasonably well served by rural schemes, including Narborough Wood Park, Desford Road, Enderby and a quite comprehensive offer in Croft. These offer high grade accommodation but are usually near to capacity so there is always demand for more stock.
- 8.30 It should also be noted that this Study has not identified any demand for Live Work premises in Blaby District. Experience suggests that Live Work is only needed in very isolated locations, with no access to more conventional premises. This is not the case even for the rural areas of the district.

Occupancy Rates

- 8.31 By floorspace occupancy rates are 91.4 percent for industrial and 94.0 percent for office space. By premises the figures are 97.0 percent for industrial and 93.7 percent for offices. Occupancy rates of 90-95 percent can be considered a reasonable balance between a vibrant, active market, providing good returns to landlords and providing capacity for churn and growth in the market. By this measure, Blaby District has some shortage of available industrial premises, when considered by premises numbers, but otherwise has reasonable occupancy rates.

Employment Land Supply

- 8.32 An initial committed supply of 48.34 ha was identified, comprising recorded planning consents and Local Plan allocations. Excluding areas of land that are unlikely to be developed in their present form, held for the use of specific businesses or are already developed/under development gives a reduced realistic committed employment land supply of 44.03 ha in seven sites.

- 8.33 Of the 44.03 ha, 43.18 ha or 98.1 percent of the realistic committed employment land supply is within Enderby and adjacent New Lubbesthorpe. Provision elsewhere, and particularly outside of the Leicester PUA is negligible. By far the largest site is Site 1: Land West of St Johns, Enderby which now benefits from Outline consent for a strategic scheme, for the full 33.30 ha, and is controlled by an experienced owner and land promoter. The ongoing good demand for larger B2/B8 uses along the M1 Corridor gives it a strong chance of delivery, subject to securing Reserved Matters planning consent(s). It is also noted that the Report 'Warehousing and Logistics in Leicester and Leicestershire: Managing growth and change, 2022' identifies the site at Land West of St Johns as a commitment in terms of strategic B8. If the District Council considers that the Land West of St Johns site forms part of the 'strategic' supply required to meet wider B8 needs (thereby removing 33.30 ha from the potential 'local' supply), the emerging Local Plan will need to make provision for additional employment land to meet the residual local requirement identified by this study.
- 8.34 Another 7.89 ha is associated with New Lubbesthorpe and remains available even if the details of delivery have yet to be established.
- 8.35 1.99 ha of this supply, comprising Site 6: Land at Everards Meadows, Cooper Way, Enderby, is consented for offices only. Since the need, as discussed below, is only for industrial and warehouse land then this site should be deducted from the committed employment land supply, giving a revised total of **42.04 ha in six sites, assuming Site 1: Land West of St Johns, Enderby remains in the local supply.**
- 8.36 In September 2023 an application for a Development Consent Order (DCO) for the Hinckley National Rail Freight Interchange was submitted for Examination by the Planning Inspectorate. The proposal being considered is for up to 850,000 sqm (gross internal area) of warehousing and ancillary buildings, plus a rail freight terminal, on 187 ha at Junction 2, M69.
- 8.37 However, the scheme was refused by the Secretary of State for Transport on 10th March 2025, due to its negative impact on highways safety at several adjoining locations. At the time of writing it is not clear if a revised scheme will be put forward here, but the existing proposal cannot be considered as part of either the local or strategic employment land supply.

Existing Employment Areas

- 8.38 BE Group have reviewed the 20 Employment Areas (industrial estates, business parks, rural and urban businesses centres and facilities for larger individual businesses) identified in Policy SA5 – ‘Key Employment Sites and Other Existing Employment Sites’ of The Blaby Local Plan, Core Strategy DPD. Another six locations were identified by BE Group through site visits and from past research. Collectively they comprise 382.28 ha of mostly developed employment land. By far the largest Employment Area is Braunstone Town Meridian Business Park (with Osiers Business Park and Lubbesthorpe Gateway), Braunstone Town (81.92 ha). This is followed by Grove Park, Enderby (42.06 ha) and Optimus Point, Glenfield (40.84 ha). Together these areas comprise 43.1 percent of the total developed land.
- 8.39 Across the 26 Areas, there was no external evidence of dereliction in any property and most stock is of average or good quality, having been built since 1945. On average, the Areas are 93 percent occupied which indicates a high level of local economic activity whilst still allowing some free space for business growth and churn as well as available premises for inward investment. The vacant and marketed properties were considered further in Section 3.0. 14 of the 26 Areas, or 53.8 percent, are fully occupied whilst The Whittle Estate, Whetstone has the lowest occupancy level at 69 percent, although as there are only 16 properties here this only equates to five vacant units, still a modest number overall.
- 8.40 43.9 percent of units in the Areas are offices while 38.0 percent are industrial, and a more modest 15.0 percent are warehouses (although this will include the strategic scale properties of Optimus Point). Only 17 properties fell into ‘other’, non E(g)/B-Class use categories, suggesting that Blaby District does not have an excessive problem with properties being converted non E(g)/B-Class uses, even given increased Permitted Development Rights since 2020. Generally, other uses were limited to single properties in nursery or hot food uses, in various Employment Areas.

- 8.41 As a result of the generally high quality of most of the District's E(g)/B-Class stock, opportunities for regeneration, refurbishment or infill development are limited to a small number of infill plots, most less than 0.33 ha in size, at Rose Business Park, Blaby; Braunstone Town Meridian Business Park (with Osiers Business Park and Lubbethorpe Gateway), Braunstone Town; Oak Spinney Park and Ratby Lane, Kirby Muxloe and Carlton Park, Narborough.
- 8.42 Overall, the 20 Allocated Employment Areas are well used and offer reasonable quality premises. All but one should continue to be protected in the next Local Plan. The exception is Hazel Drive, Braunstone Town which comprises two properties in motor trade, rather than traditional E(g)/B-Class use.
- 8.43 The existing Allocated Employment Areas are focused on the main settlements of Blaby District, generally falling east of Narborough. However, the six additional Employment Areas do show that there is a reasonable offer of E(g)/B-Class premises in the rural west of the district, including good quality schemes in Croft and Narborough Wood Park, Desford Road, Enderby a high quality office scheme. Overall, four of the six additional Areas should be protected in the Local Plan for E(g)/B-Class uses. The exceptions are Watergate Lane, Braunstone Town, where again premises is in trade/wholesale rather than traditional E(g)/B-Class use. Also Croft Quarry Offices, Huncote Road, Croft which, while 75 percent occupied, only comprises four properties in a mostly backland position with constrained access.

Objectively Assessed Needs

- 8.44 Cambridge Econometrics forecasting projects that Blaby District will gain 2,531 jobs to 2046, 3.4 percent growth. Those new jobs will be focused on Construction, with a net gain of 1,857 jobs forecast, continuing a trend of sectoral growth seen since 2015, and in the public sector. By comparison, Blaby District is projected to lose some 527 manufacturing jobs to 2046, a reduction of 9.9 percent. This is inconsistent with trends over 2015-2022, which saw a gain of manufacturing jobs, but broadly assumes that increasing automation and efficiency in the sector will reduce employment over time. In terms of private office sector jobs, a gain of 161 jobs in ICT is marginally offset by a loss of 1,285 jobs in Financial and business services. The logistics sector will see a gain of 983 jobs, reversing the recent trend of jobs reduction.

- 8.45 There is no definitive model for forecasting future employment land need. Here future employment land provision has been assessed using a projection forward of historic land take-up as well as 'Policy Off' forecasts based on employment sector change from the Cambridge forecast.
- 8.46 Two alternative forecast options have been produced and considered for the periods 2024-2041, and 2024-2046 for Blaby District.
- 8.47 Model One is Labour Demand, a baseline or Policy-Off forecast which makes no allowance for major public policy interventions in Blaby District. It uses, as its base, the Cambridge Econometrics forecast of jobs change, by sector, over 2024-2041, and 2024-2046. The Cambridge forecast projects the following growth:
- 2024-2041: 2,062 extra jobs
 - 2024-2046: 2,531 extra jobs.
- 8.48 To use these figures to forecast OAN in Blaby District, several adjustments must be made to allow for real world conditions:
- An allowance is made for part time working in the labour force, by converting the forecasts for total employment, by sector, into forecasts for Full-Time Equivalent (FTE) jobs by sector. This is achieved through an analysis of the proportion of full-time and part-time jobs in Blaby District as of 2022, using BRES data. By forecast period the FTE jobs change is projected to be:
 - 2024-2041: 1,792 extra jobs
 - 2024-2046: 2,224 extra jobs.
 - The second consideration is homeworking, which affects the number of new jobs which need to be accommodated in commercial premises and therefore need employment land. The 2021 Census identified homeworking rates 30.2 percent in Blaby District, mostly impacting on office based sectors. Reducing the relevant, office-based, sectors by the above proportion, to exclude jobs which would be mostly home based reduces the FTE employment growth to:
 - 2024-2041: 1,323 extra jobs
 - 2024-2046: 1,641 extra jobs.

- However, 2021 Census data was collected at a time when the UK was still experiencing lockdowns associated with the Covid-19 Pandemic, it may therefore exaggerate present homeworking rates. Stakeholders argue that homeworking and particularly hybrid working is continuing in office based businesses locally although it they were unable to define the exact amounts of contemporary, or future, home based working. Reflecting this uncertainty, scenarios are presented with and without a deduction for homeworking.

8.49 The FTE jobs change figures are converted into a floorspace and land need using standard estimates of jobs density, the floorspace each job requires, and estimates of what proportion of the jobs will be accommodated in E(g)/B-Class property. When the resulting land needs from the office, industrial and warehouse sectors are combined, the following OAN can be identified, with and without a deduction homeworking (see Table 29).

Table 29 – Forecast Outputs, Hectares

Use	2024-2041	2024-2046
Gross of Homeworking		
Office (inc. Research and Development) Land	-0.2	-0.2
Industrial Land	-4.6	-4.6
Warehouse Land	1.7	1.7
Total Land Need	-3.2	-3.2
Net of Homeworking		
Office (inc. Research and Development) Land	-0.4	-0.2
Industrial Land	-5.5	-5.5
Warehouse Land	2.1	2.1
Total Land Need	-3.8	-3.6

Source: BE Group, 2024

8.50 However, the outputs are severely limited by the large declines in manufacturing employment, and a smaller net projected decline in office employment (mostly a decrease in Financial and Business Services employment), predicted in the model, which does not reflect a real world position in which manufacturing firms may seek growth for a range of reasons unrelated to how many they employ. Accordingly, there is a case for excluding the industrial change in this scenario and looking at the office and warehouse forecasts, where growth is projected.

- 8.51 Model Two is Past Take Up, the forward projection of historic take up in Blaby District since 2006/2007. Figures net of losses have been provided by the Council.
- 8.52 A separate assessment of needs for strategic logistics land, for premises larger than 9,000 sqm, is currently underway entitled 'Leicester and Leicestershire: Strategic Distribution Floorspace Needs Update and Apportionment' updating previous research and covering the whole of Leicester and Leicestershire. To avoid double counting of needs, five completions larger than 9,000 sqm each were removed from the Take Up data for this analysis.
- 8.53 The last national recession left significant and lasting impacts on the UK property market, including viability impacts on the delivery of office premises and growing demand for logistics accommodation which has continued into the 2020s. To consider how the recession has changed the property market in Blaby District, a second 'short term' Past Take Up Model has been completed which only reviews take up over the 11 post recession years 2013-2014 to 2023-2024.
- 8.54 Tables 30 and 31 summarise the outputs of Models One and Two.

Table 30 – Blaby OAN Projections – Labour Demand Models – With a 5-Year Buffer, Hectares*

Use	2024-2041	2024-2046
Gross of Homeworking		
Office (inc. Research and Development) Land	-0.2	-0.2
Industrial Land	-4.6	-4.6
Warehouse Land	2.2	2.2
Total Land Need	-2.6	-2.6
Net of Homeworking		
Office (inc. Research and Development) Land	-0.4	-0.2
Industrial Land	-5.5	-5.5
Warehouse Land	2.7	2.7
Total Land Need	-3.2	-3.0

Source: Cambridge Econometrics, MBC, BE Group, 2024

*Buffer not applied to negative figures.

Table 31 – Blaby OAN Projections – Past Take Up Model, Net of Losses – With a 5-Year Buffer, Hectares*

Take Up Model	Forecast Period	Average Take Up Projected Over the Forecast Periods: Office Research and Development) Land	Average Take Up Rate Over the Forecast Periods: Industrial Land	Average Take Up Rate Projected Over the Forecast Periods: Warehouse Land	Average Take Up Rate Projected Over the Forecast Periods: Total Land Need
Long Term Take Up Period – 2006-2024	2024-2041 (x23 (years))	7.82	-1.84	23.46	29.44
Long Term Take Up Period – 2006-2024	2024-2046 (x28 (years))	9.52	-2.24	28.56	35.84
Short Term Take Up Period – 2013-2024	2024-2041 (x23 (years))	5.06	-3.91	30.82	31.97
Short Term Take Up Period – 2013-2024	2024-2046 (x28 (years))	6.16	-4.76	37.52	38.92

Source: BE Group, 2025

*Based on past local take up only, excluding all past completions of B8 units larger than 9,000 sqm in size.

- 8.55 A buffer of 5 years is also applied to the above OAN figures to provide a choice of sites by size, quality and location, allow for exceptional losses, particularly through Permitted Development, and to provide a continuum of supply beyond the end of the forecast period.
- 8.56 In terms of a preferred **OAN for offices**, experience suggests that the quantum of office space required by businesses is strongly driven by the number of staff they must accommodate. Thus, the jobs-based Labour Demand model is likely to best project office sector needs moving forward. As most of the projected jobs growth is in office based sectors, utilising Labour Demand modelling for offices also means that OAN will account for the bulk of the employment change moving forward.
- 8.57 Discussions with stakeholders suggest that some two years after the end of the Covid-19 Pandemic and associated Lockdowns, homeworking and hybrid working practices are here to stay with impacts on the quantum of space businesses need. While it is not possible to say exactly how working practices will evolve to 2046, Labour Demand models with an allowance for homeworking are more realistic at this time.

- 8.58 As forecasts of office jobs change are negative overall, reflecting projected losses in Financial and Business Services, there is no requirement to allocate any land specifically to meet office needs. This does not imply that no offices will be built in Blaby District, to 2046, only that there is not a need to allocate sites specifically to meet office requirements. Rather, where viable, offices will be brought forward in mixed-use schemes or through redevelopment/refurbishment.
- 8.59 It should also be noted that a proportion of the additional E(g)(i) jobs which are forecast will be accommodated in any B2/B8 properties developed. Modern industrial and warehouse units increasingly combine administrative functions with production and logistics functions, on single sites for greater efficiency. For example, the 2023 research paper 'Critical Infrastructure: Driving Employment Growth within the UK's Logistics Sector' by Prologis indicates that an average 46,450 sqm B8 unit will employ 67 office staff and 45 managerial staff. This represented just under a quarter of the 480 total staff employed in that example facility.
- 8.60 Requirements for **industrial and warehouse** premises are more driven by needs for production and storage space than the need to accommodate changing staffing levels. Thus, such companies may have ongoing property requirements even when they are reducing the numbers they employ, particularly if automation is improving productivity per worker. Industrial and warehouse companies are also more likely to acquire and hold onto expansion land and premises, even in times of contraction in the business, than office sector companies, in anticipation of future growth. This results in a weaker link to the jobs-based Labour Demand modelling that was true for offices. Additionally, the Labour Demand model forecasts negative or negligible land needs in the industrial sector, which is at odds with identified market demand and the almost exclusively industrial committed local employment land supply.

8.61 Here therefore the Past Take Up model is recommended as it is independent of jobs change projections and based on real world trends. It accounts for periods of growth and recession in the local economy since 2006/2007, allowing that such economic growth and decline will continue to 2046. It is thus likely to be better in tune with real market demand than the Labour Demand model. As office sector need has already been accounted for, the industrial and warehouse sector OAN excludes office provision, to avoid double counting. Consequently, the recommended industrial and warehouse sector OAN is:

- **2024-2041 – 21.62-26.91 ha**
- **2024-2046 –26.32-32.76 ha.**

(N.B. Figures shown represent the warehouse need less the negative industrial need).

8.62 In terms of whether the Past Take Up Model should be based on the analysis of short term (2013-2024) or long term (2006-2024) historic completions (or potentially the period 2011/2012 to 2019/2020 which was used in the HENA, 2022), BE Group would argue the longer period should be favoured. The maximum analysis period, 2006-2024, takes in several periods of growth and recession in the national economy which occurred and which may happen again. In this regard using longer term take up would be consistent with Planning Practice Guidance, specifically Para 027 of 'Housing and Economic Needs Assessments' which indicates that *"Authorities will need to take account of longer term economic cycles in assessing this data..."*

8.63 Although the national recession certainly impacted on the property market since 2013, there will doubtless be further changes to 2046, and while we cannot know what they will be, taking the broadest view on the available data provides the best chance of accounting for uncertainties about the future. Finally, it should also be noted that the differences in outputs between the short and long term forecast models are modest, with the largest variation being an extra 5 ha of requirement on the warehouse need under the short term forecast.

8.64 For these reasons it is recommended that the full Take Up figures, including larger B2/B8 take up be used to calculate industrial OAN. **This gives needs of 21.62 ha to 2041 and 26.32 ha to 2046.**

Protecting Employment Land Supplies and Meeting the Needs

- 8.65 With a realistic 2024 committed employment land supply scenario of to 42.04 ha, Blaby District has sufficient employment land to meet its local needs assuming Site 1: Land West of St Johns, Enderby remains in the local supply. If the District Council considers that the Land West of St Johns site forms part of the 'strategic' supply required to meet wider B8 needs (thereby removing 33.3 ha from the potential 'local' supply), the emerging Local Plan will need to make provision for additional employment land to meet the residual local requirement identified by this study (21.62ha up to 2041). This would amount to approximately 13 ha once committed potential 'local' industrial and warehouse supply is taken into account. However, it is worth highlighting that out of the 15 further supply options, identified through Call for Sites, 11 receive a grading of A- to B- and might meet at least some local needs

9.0 RECOMMENDATIONS

Introduction

- 9.1 This section sets out the consultants' recommendations arising from the Blaby Employment Land and Premises Study in terms of local needs for, and supply of, employment land and premises. The recommendations in this report have had full regard to the requirements of the new NPPF and PPGs to encourage and deliver growth through the planning system. It updates and supersedes previous Employment Land Studies produced by the Council.

Employment Sites and Premises

Recommendation One – Existing Employment Areas to be Retained

- 9.2 26 Employment Areas have been assessed. All, with three exceptions, remain well occupied, viable local and strategic employment locations. They are particularly key in meeting the needs of local businesses, in locations where new development, on the Employment Sites, is proving slow to bring forward. **It is recommended that these continue to receive protection under the new Local Plan. For clarity the 23 areas which should be protected, comprising both previously adopted employment areas, and four other locations identified in this Study:**

Previously Adopted Areas

- **Blaby Industrial Estate, Blaby**
- **Rose Business Park, Blaby**
- **Braunstone Town Meridian Business Park (with Osiers Business Park and Lubbesthorpe Gateway), Braunstone Town**
- **Everards Meadow and Police HQ, Enderby**
- **Grove Park, Enderby**
- **Mill Hill Industrial Estates, Enderby**
- **Next PLC, Enderby**
- **Warren Business Park, Enderby**
- **County Hall, Glenfield**
- **Mill Lane Industrial Estate, Glenfield**
- **Optimus Point, Glenfield**

- **Oak Spinney Park and Ratby Lane, Kirby Muxloe**
- **Lubbesthorpe Strategic Employment Site, Lubbesthorpe**
- **Carlton Park, Narborough**
- **Coventry Road Industrial Estates, Narborough**
- **Foxbank Industrial Estate, Station Road, Stoney Stanton**
- **Cambridge Road Industrial Estates, Whetstone**
- **Enderby Road Industrial Estates and Grange Business Park, Whetstone**
- **The Whittle Estate, Whetstone – *Exclude land now developed for housing in the north west.***

Other Areas

- **Winston Avenue, Croft**
- **Riverside Court, Croft**
- **Wharf Way, Glen Parva**
- **Narborough Wood Park, Desford Road, Enderby.**

9.3 Protection should best come through an updated version of Policy SA5 – ‘Key Employment Sites and Other Existing Employment Sites’, as set out in the Local Plan (Delivery) DPD (2019). Such a policy should only allow losses, of employment premises to other uses, if an applicant can demonstrate exceptional circumstances and that the proposals will not have a significant adverse impact on surrounding local uses. Such development should however not prejudice the efficient and effective uses of the remainder of the employment site. Proposals to upgrade facilities and improve the quality of the stock should be supported to ensure the need for E(g)/B2/B8 use space is met.

9.4 At Appendix 9, Developer Marketing Standards, created by BE Group from its own experience in marketing commercial premises, are set out that provide the template for delivering the evidence that premises or sites have been appropriately marketed without success by owners for their existing use (E(g)/B2/B8), are not needed by the market for that use, and could therefore be considered for alternative uses.

9.5 Generally, a marketing period of 12 months should be allowed for as sufficient time to provide evidence that land/premises is surplus to requirements as, in a relatively strong market like that in Blaby, a desirable plot should have seen some market interest in over this period. Larger plots, over approx. 2 ha in size, should be allowed a longer marketing period of up to 18 months, to reflect the fact that they will need to be promoted at the regional and national levels. Attracting an inward investor to a site can take time, particularly if that site is competing with a range of other options in the strategic marketplace. Large regional/national firms can also be slow in their decision making regarding their land and premises need.

9.6 These Employment Areas include areas of undeveloped/vacant land and property, as identified in Section 5.0, which provide regeneration opportunities for the Borough. Some of these locations have consents for E(g)/B-Class uses, others are likely to be proposed for mixed use schemes or even residential proposals. Overall, they are integral parts of the wider Employment Area, and it **is recommended that they be protected against loss to non E(g)/B-Class uses along with the developed parts of the Employment Areas, as is discussed above. If judged appropriate and reflecting the full range of planning factors, undeveloped land within the Employment Areas could be identified for allocation as employment development land in the next Local Plan.** Within the 26 Employment Areas reviewed in this Study, three Areas offer development plots, larger than 0.25 ha in size, which could meet E(g)/B-Class needs:

- Rose Business Park, Blaby – Land south of Rose Way, fronting Lutterworth Road (in front of the Daisy Chain Nursery) (0.37 ha)
- Braunstone Town Meridian Business Park (with Osiers Business Park and Lubbesthorpe Gateway), Braunstone Town – 0.79 ha of land is undeveloped, to the rear of Harrison Carr, HC House, 28c Centurion, Centurion Way
- Carlton Park, Narborough – 0.67 ha in the west, north of the western Santander Data Centre and the Busy Bees Nursery is undeveloped. This may need to remain undeveloped to maintain a secure perimeter around data centres, however.

Permitted Development Rights

9.7 Changes of use from the E(g) Use Classes to other the E Use Classes, are now permissible without a Change of Use Consent, on these existing employment areas and elsewhere. It is still possible to limit changes of use outside of Permitted Development (where planning consent is still required) and Figure 26 shows an example policy produced by Amber Valley Borough Council, to protect its high quality Employment Areas. If an equivalent protection was provided for in Blaby District, the Employment Areas which might benefit include the following which are home to the bulk of the district's high grade stock, particularly of modern offices and strategic logistics premises, and of its regional/national employers:

- Braunstone Town Meridian Business Park (with Osiers Business Park and Lubbethorpe Gateway), Braunstone Town – A strategic scale employment location, a focus for inward investment and a key source of larger offices
- Everards Meadow and Police HQ, Enderby – Home to the key Police HQ facility and with consent for the development of major new offices. Any allocation would need to recognise the leisure and retail uses already present, and consented, in the Area
- Grove Park, Enderby – Key source of modern, high grade office and industrial/warehouse premisses, accommodating a range of major employers
- Next PLC, Enderby – HQ office and warehouse facilities, home to one of the district's largest employers
- County Hall, Glenfield – HQ offices, home to a major employer
- Optimus Point, Glenfield – Established strategic scale logistics scheme, a key facility within the county's wider offer of B2/B8 premises
- Oak Spinney Park and Ratby Lane, Kirby Muxloe – A small area, but accommodating several major employers, including Saladworks, as well as a scheme of high quality self-contained offices and which links to the neighbouring strategic scale Employment Area of Braunstone Frith Industrial Estate (in Leicester)
- Lubbethorpe Strategic Employment Site, Lubbethorpe – Established strategic scale logistics scheme, with further growth potential
- Carlton Park, Narborough – High grade office park, home to multiple national/international employers including Santander as well as several secure data centres

- Cambridge Road Industrial Estates, Whetstone and The Whittle Estate, Whetstone – Collectively these two Employment Areas provide a strong offer of high quality industrial and warehouse premises, accommodating a number of advanced manufacturing businesses including Cavendish Nuclear
- Narborough Wood Park, Desford Road, Enderby – Key source of good quality offices, serving the rural economy.

Figure 26 – Amber Valley Example Development Policy – Amber Valley Borough Local Plan 2022-2040. Pre-Submission Local Plan, Subject to Modifications Following Regulation 19 and Examination

Policy ED1 Development Within Existing Business and Industrial Areas

Development will be permitted for E (Commercial, Business and Service), B2 (General Industrial) and B8 (Storage and Distribution) uses within designated Existing Business and Industrial Areas, as shown on the Policies Map, including the redevelopment of land and buildings or the expansion of existing premises.

Within the designated Existing Business and Industrial Areas, development will only be permitted for uses other than E (Commercial, Business and Service), B2 (General Industrial) and B8 (Storage and Distribution), if the proposals:-

- a) relate to land or premises not currently in E, B2 or B8 use, and
- b) would not lead to a shortfall in the availability of business and industrial land within the Borough.

Proposals that would result in a loss of land from E and B uses to another use or uses whether in a designated employment area or not, will only be permitted where:

- c) It can be demonstrated through active, extensive and realistic marketing over a period of 12 months that the land or premises are no longer required to meet future employment land needs and that there is a lack of demand for the land or premises in that location;
- d) The proposed use is compatible with neighbouring uses and, where applicable, would not prejudice the continued use of neighbouring land for employment; and
- e) they provide facilities that are supportive of Class B or Class E(g) uses

In relation to the above, E(g) use should apply instead of E use, within the following Existing Business and Industrial Areas:...

Source: Amber Valley Borough Council, 2025

9.8 It should be noted that to limit changes of use within Permitted Development Rights (that do not require planning consent to implement) the relevant areas would need to be protected via Article 4 Directives. At the time of writing, Amber Valley intends to monitor the rate of losses it experiences in key locations before deciding whether to pursue any Article 4 Directives.

Other Employment Locations

9.9 A range of employment uses, both solus business properties and in small groups, can be found across Blaby District, outside of the allocated/proposed Employment Areas. A key example of this is the John Brindley Commercials site at Sharnford, which does accommodate some other businesses.

9.10 In terms of protecting employment properties that do not sit within existing employment areas, **it is recommended that the redevelopment of employment land and premises for non B-Class employment uses should be allowed in the following circumstances, if:**

- **The present (or previous, if vacant or derelict) use causes significant harm to the character or amenities of the surrounding area, and it is demonstrated that, through an appropriate period of marketing and viability testing, (again subject to Permitted Development Rights) no other appropriate viable alternative E(g)/B2/B8 employment uses could be attracted to the site (see Appendix 9 for guidance on appropriate marketing periods), or**
- **Mixed-use redevelopment would provide important community and/or regeneration benefits with no significant loss of jobs, potential jobs, and the proposed mix of uses accords with other planning policies.**

9.11 This advice is offered without consideration of other planning, traffic/highways issues, etc. which might render some uses or mixed-use developments inappropriate on existing employment areas. It is clearly for the Council to judge proposals on their merits taking account of these factors.

Recommendation Two – Defining and Protecting the Current Realistic Land Supply

- 9.12 For this study, the current realistically available employment land supply in Blaby District was 44.03 ha in seven sites. Sites outside of this realistic employment land supply, were judged not to be readily available to meet employment land needs.
- 9.13 Three quarters of the supply comprises Site 1: Land West of St Johns, Enderby which now benefits from Outline consent for a strategic scheme, for the full 33.30 ha, and is controlled by an experienced owner and land promoter. The ongoing good demand for larger B2/B8 uses along the M1 Corridor gives it a strong chance of delivery, subject to securing Reserved Matters planning consent(s). It is also noted that the Report 'Warehousing and Logistics in Leicester and Leicestershire: Managing growth and change, 2022' identifies the site at Land West of St Johns as a commitment in terms of strategic B8. If the District Council considers that the Land West of St Johns site forms part of the 'strategic' supply required to meet wider B8 needs (thereby removing 33.3 ha from the potential 'local' supply), the emerging Local Plan will need to make provision for additional employment land to meet the residual local requirement identified by this study (21.62 ha up to 2041). This would amount to approximately 13 ha once committed potential 'local' industrial and warehouse supply is taken into account.
- 9.14 Another 7.89 ha is associated with New Lubbesthorpe and remains available even if the details of delivery have yet to be established.
- 9.15 Overall, the existing supply is almost completely focused on the Enderby and New Lubbesthorpe area. While this does reflect the focus of market demand in the district overall, it provides few opportunities for growth elsewhere, particularly in rural parts of the district, something discussed further below.
- 9.16 However, it is still **recommended that the Council seek to protect its existing employment land supply from loss to alternative, non-E(g)/B2/B8, uses.** Undeveloped employment land should be protected alongside developed land, as discussed in Recommendation One, and subject to the same criteria for when it can be released to alternative uses.

- 9.17 This particularly applies to Site 1: Land West of St Johns, Enderby which has a consent for a major B2/B8 scheme and will be the main focus for development, in Blaby District in the short-mid term. Reflecting the site's importance it is therefore **recommended that Site 1 be protected in the Key Employment Sites policy in the new Blaby District Local Plan**. This reflects how previous significant sites the Lubbсторpe Strategic Employment Site, Glenfield Park / Optimus Point and Everards Meadows, which had planning consents for major developments at the time, were protected as Key Employment Sites in the Blaby District Local Plan, Local Plan (Delivery) Development Plan Document (DPD) (2019). This would remain relevant even if it was determined that Site 1: Land West of St Johns, Enderby will meet strategic rather than local needs as Site 1 would still be a Key Employment Site, albeit now for the county rather than just the district.

Future Employment Land Needs

Recommendation Three – Defining the Objectively Assessed Need

- 9.18 OAN has been calculated based on two models – Policy Off Labour Demand, both with and without a deduction for the impacts of homeworking, and a forward projection of Past Take Up.
- 9.19 In terms of the preferred OAN for offices, the Policy Off Labour Demand model is chosen. This reflects the fact that:
- Unlike industrial/warehouse uses, the quantum of office space required by businesses is strongly driven by the number of staff they have to accommodate, so a forecast based on jobs change is most likely to be relevant here
 - As most of the projected jobs' growth, gross of losses, is in office-based sectors, utilising Labour Demand modelling for offices also means that OAN will account for the bulk of the employment change moving forward.
- 9.20 Discussions with stakeholders suggest that some two years after the end of the Covid-19 Pandemic and associated Lockdowns, homeworking and hybrid working practices are here to stay with impacts on the quantum of space businesses need. While it is not possible to say exactly how working practices

will evolve to 2046, Labour Demand models with an allowance for homeworking are more realistic at this time.

- 9.21 It is therefore **recommended that Blaby District Council use the Labour Demand model as the main measure of future office land need for the periods 2024-2041 and 2024-2046. As the jobs change figures show a net negative change, this means there is no employment land requirement specifically for offices.**
- 9.22 Requirements for industrial and warehouse premises are more driven by needs for production and storage space than the need to accommodate changing staffing levels. Improvements in productivity and increasing automation in manufacturing are also changing jobs densities and reducing the link between numbers employed and land and property needs. This makes jobs-based, Labour Demand, modelling less relevant. Additionally, the Labour Demand model forecasts negative or negligible land needs in the industrial sector, which is at odds with identified market demand and the almost exclusively industrial committed local employment land supply.
- 9.23 Here, therefore, the Past Take Up model is preferred as it is independent of jobs change projections and based on real world trends. It accounts for periods of growth and recession in the local economy since 2006/2007, allowing that such economic growth and decline will continue to 2046. It is thus likely to be better in tune with real market demand than the Labour Demand model.
- 9.24 In terms of industrial and warehouse needs, **it is therefore recommended that Blaby District Council use the roll forward of Past Take Up, with a five-year buffer. This indicates needs of:**
- **2024-2041 – 21.62 ha**
 - **2024-2046 – 26.32 ha.**
- 9.25 Deducting the realistic 2024 committed employment land supply scenario, for industrial/warehouse uses, of 42.04 ha, Blaby District has sufficient land to meet local needs, to 2046 assuming Site 1: Land West of St Johns, Enderby remains in the local supply. If the District Council considers that the Land West of St Johns site forms part of the 'strategic' supply required to meet wider B8 needs (thereby removing 33.3 ha from the potential 'local' supply), the emerging Local

Plan will need to make provision for additional employment land to meet the residual local requirement identified by this study.

- 9.26 **Although losses of employment land, to non E(g)/B-Class uses, have not been a significant issue historically, the Council should still continue to monitor losses and ensure that the broader supply of local employment land it needs is protected.**

Meeting Needs

Recommendation Four – Meeting Office Needs

- 9.27 As noted in Recommendation Two, there is no specific Office OAN in Blaby District, reflecting projections that office sector jobs will experience some net decline to 2046. This does not mean that no offices will be developed in the district, only that no specific office based employment land allocations need to be provided for. Office sectors, potentially excluding Financial and insurance, will still gain jobs, local businesses will still wish to grow, and new inward investment will take place. New office needs will likely be met through the refurbishment of existing premises, particularly in designated town centres (such as Blaby Town Centre), where the expansion of such uses would be particularly appropriate as well as the inclusion of office components in mostly industrial/warehouse schemes. Existing Employment Site 6: Land at Everards Meadows, Cooper Way, Enderby also has Outline Consent for offices while at least some office development remains likely at New Lubbethorpe.
- 9.28 However, delivering new offices viably remains difficult, even in Leicester City Centre. Accordingly, **it is recommended that the District Council, LCC and other relevant partners support office development in Blaby District, for example by providing advice and support to developers, landowners and businesses in areas such as planning, marketing, land and property acquisition, construction and skills. More direct public sector financial support is also encouraged, where possible.**
- 9.29 **Planning policy should be supportive of office provision in appropriate locations. This should include appropriate rural conversions and developments, given the success of existing rural office schemes such as Narborough Wood Park and schemes in Croft.**

Recommendation Five – Meeting Overall Industrial/Warehouse Needs

- 9.30 With 42.04 ha of supply, against needs of no more than 26 ha, Blaby District has sufficient land to meet local needs, to 2046. **Accordingly, it is not recommended that the Local Plan allocate any further local employment sites, unless land West of St Johns is not considered to form part of ‘local’ employment supply and/or there is a need to mitigate the loss of existing local employment land to other, non E(g)/B-Class uses or to strategic employment land allocation.**
- 9.31 Requirements for strategic employment sites will be driven by the ‘Leicester and Leicestershire: Strategic Distribution Floorspace Needs Update and Apportionment’ Study and what, if any strategic logistics needs is apportioned to Blaby District. At the time of writing the findings of that study remain incomplete but it is still **recommended that the Council be guided by the Leicester and Leicestershire: Strategic Distribution Floorspace Needs Study as to what strategic employment allocations may be required within the district.**

Recommendation Six – Meeting Local Needs

- 9.32 The fact that no further local employment allocations are recommended here (subject to the approach taken in respect of Land West of St Johns and/or any significant losses), does not mean that Blaby District will not see any industrial or local warehousing developments to 2046. As noted, there is healthy local demand for properties of up to 1,000 sqm and even up to 5,000 sqm. While some 42 ha of employment land remains undeveloped, this supply is heavily concentrated in Enderby and New Lubbethorpe. To allow economic growth elsewhere **it is recommended that the Local Plan seek to support the small scale growth and expansion of the 23 Employment Areas identified previously. As noted, opportunities for infill development appear modest and accordingly small scale expansion, appropriate to the scale and location of the area should also be supported, particularly in the rural west of the district.**

Recommendation Seven – Encouraging Rural Diversification

- 9.33 Blaby District has a diverse range of well occupied rural E(g)/B2/B8 employment schemes, which meet a high proportion of the district’s business needs. Thus,

rural conversions appear to be less of a feature of Blaby District's economy than might be true in neighbouring areas, but it will still have a role in the economy particularly in providing affordable storage space that might not be available in larger industrial estates.

- 9.34 Agricultural diversification will be a key source of such premises, but it is about more than the reuse of farm buildings. Solus rural commercial properties will also provide opportunities for reuse or redevelopment to meet rural needs for B-Class premises or other uses appropriate to this location and subject to Local Plan Policies.
- 9.35 **A broader rural diversification policy is therefore recommended in the Local Plan which indicates support for E(g)/B2/B8 developments which are appropriate to their location in terms of:**
- **Access and traffic generation**
 - **Scale and intensity of use**
 - **Local landscape quality and environmental/ecological issues**
 - **Impacts on neighbouring uses**
 - **Signage requirements (both directional signage on surrounding roads and onsite signage)**
 - **Sustainable development principles.**
- 9.36 Reuse of existing premises is always desirable but new development may also be needed to address all requirements and, subject to the above, should not be discouraged.
- 9.37 Policy should also encourage development for a mix of E(g)/B-Class uses, not purely for office or industrial uses and, where possible, for a mix of tenures and price ranges. Rural businesses will need a diverse mix of premises, but experience suggests that rural schemes can concentrate too much on either high-end accommodation or very low-grade industrial space. While policy cannot enforce how much developers charge for space it can encourage a greater diversity of provision.
- 9.38 This expands upon the Agricultural Conversion policy already found in 'Policy CS6: Employment' of the Adopted Core Strategy.

- 9.39 As mentioned, this Study has not identified any demand for Live Work space in Blaby District and their development locally is considered unlikely. A specific reference to Live Work facilities in policy appears unnecessary.

Other Recommendations

Recommendation Eight – Future Reviews

- 9.40 This report has shown how market conditions in Blaby District have changed in the approx. 14 years since the completion of the last local Employment Land Study, particularly over the last few years because of the Covid-19 Pandemic. In 2024/2025 there remains economic uncertainty over the long-term impacts of inflation, supply shortages and the risks of national recession, as well as local issues such as whether an alternative to the Hinckley National Rail Freight Interchange will come forward.
- 9.41 In view of these factors, **it is recommended that the Council reviews the local employment land portfolio at intervals of around five years.** This is also in accordance with the NPPF which recommends Local Plan, and evidence base, reviews at least once every five years.

Recommendation Nine – Maintain Awareness of External Influences

- 9.42 As a first point, Blaby District Council must recognise its role, together with its neighbours, in developing the economy of its FEMA. In this respect, they are interconnected, to varying degrees, on several levels.
- 9.43 Key overlapping issues, in the FEMA, which will need further consideration and monitoring include:
- The ongoing strategic need for B8 logistics across Leicester and Leicestershire and what share of that need Blaby District will need to support, even without the Hinckley National Rail Freight Interchange
 - Science parks in Loughborough and Leicester will likely take up a lot of demand for high tech uses in the city and county, impacting on demand in Blaby District
 - Leicester has further employment land needs which cannot be met within the city boundary. At the time of writing, it is assumed these will be met in Charnwood, however

- Several of Blaby District's neighbours have, or are proposing, very significant employment land allocations which will impact on demand locally.

9.44 **Accordingly, a high level of joint working between these authorities and Blaby District Council is recommended.**

Appendix 1

List of Consultees

Appendix 1 – List of Consultees

Andrew and Ashwell

APB Chartered Surveyors

Blaby District Council

Cerda

Charnwood Borough Council

Eddisons

Harborough District Council

Hinckley and Bosworth Borough Council

Leicester City Council

Leicestershire County Council

North West Leicestershire District Council

Oadby and Wigston Borough Council

West Northamptonshire Council

Appendix 2

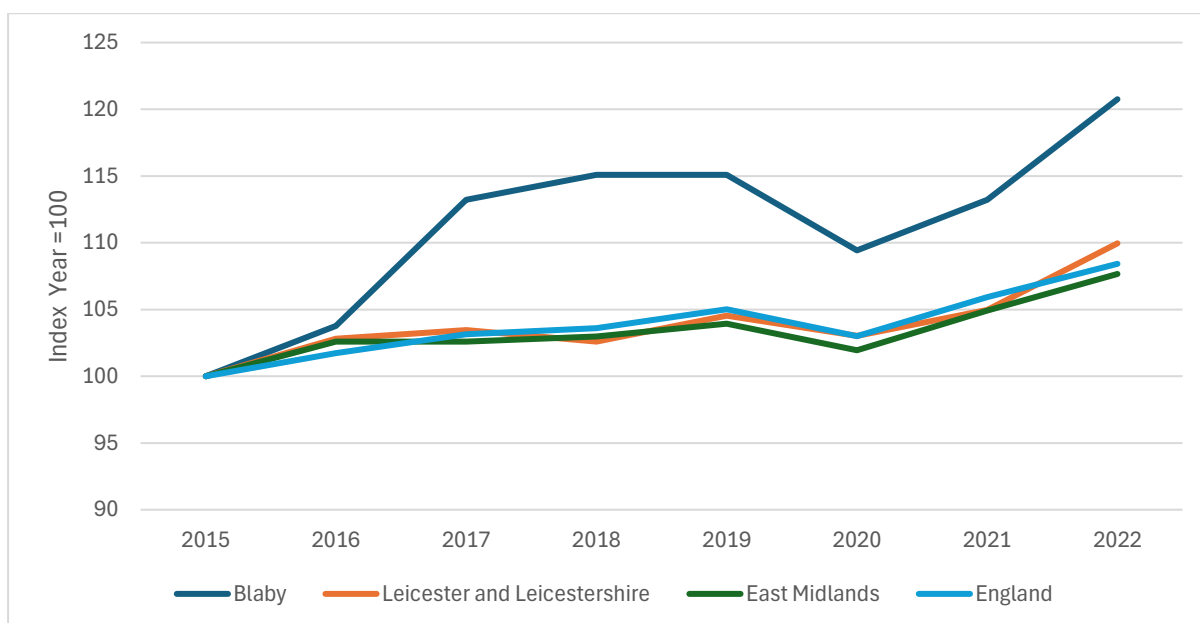
Jobs Change Analysis

Appendix 2 – Jobs Change Analysis

Introduction

- A2.1 This Appendix provides an analysis of the change in employment and business levels, in Blaby District since 2015, by sector. This provides evidence on the scale and nature of business demand, and how that demand has changed over the last decade.
- A2.2 The Business Register and Employment Survey (BRES) data provides details on the number of jobs within differing industry sectors within a local authority area. It should be noted that BRES is a measure of all jobs in a local authority area, including those staffed by in-commuters, not just residents employed locally.
- A2.3 In BRES latest data, 2022, Blaby District had a total of 63,100 individuals in employment. Figure 2.1 compares the growth of employment in Blaby District with the Leicester and Leicestershire total, 508,000 jobs in 2022, over the region and the nation over the 2015-2022 period with 2015 as the base year. The city and county, region and nation saw reasonably steady growth over this period, with a drop in the Pandemic year 2020. Blaby District saw strong growth over from 2016-2019, specifically a steep increase over 2016-2017, followed by a drop in 2020 which is accredited to the Covid 19, Pandemic year. The recovery since 2020 has been proportionately much stronger in Blaby District than elsewhere.

Figure 2.1 – Employment Growth, 2015-2022



Source: BRES, 2024

A2.4 Table 2.1 measures local economic activity by sector within the study area, as of 2022. The figure shows that the Professional, scientific and technical sector accounted for by far the largest number of employees at 13,000 or 20.3 percent of employment as of 2022. Proportionally, this is more than double the average for Leicester and Leicestershire, the East Midlands and Great Britain. Most of this total, 10,000, is in the 'activities of head offices; management consultancy activity' which will reflect the established offer of HQ offices at Grove Park.

Table 2.1 – Economic Activity 2022

Sector	Blaby		Leicester and Leicestershire	East Midlands	Great Britain
	Number	Percent	Percent	Percent	Percent
Agriculture, forestry and fishing	100	0.2	0.4	0.8	0.7
Mining, quarrying and utilities	2,250	3.5	1.6	1.4	1.3
Manufacturing	5,000	7.8	11.6	11.3	7.6
Construction	5,000	7.8	5.1	5.5	4.9
Motor trades	1,250	2.0	2.4	2.7	1.7
Wholesale	2,250	3.5	4.5	4.5	3.7
Retail	6,000	9.4	7.7	8.3	8.5
Transport and storage	2,500	3.9	7.7	6.6	5.0
Accommodation and food services	3,500	5.5	6.5	7.5	8.0
Information and communication	900	1.4	2.8	2.7	4.5
Financial and insurance	2,500	3.9	2.2	1.7	3.3
Property	600	0.9	1.4	1.3	1.8
Professional, scientific and technical	13,000	20.3	8.7	6.9	9.0
Business administration and support services	4,000	6.2	9.6	9.0	9.0
Public administration and defence	6,000	9.4	3.9	4.0	4.7
Education	2,500	3.9	9.3	8.5	8.6
Health	4,000	6.2	11.2	13.7	13.5
Arts, entertainment, recreation and other services	1,750	2.7	3.3	3.5	4.4
Total	63,100	100	100	100	100

Source: BRES, 2022

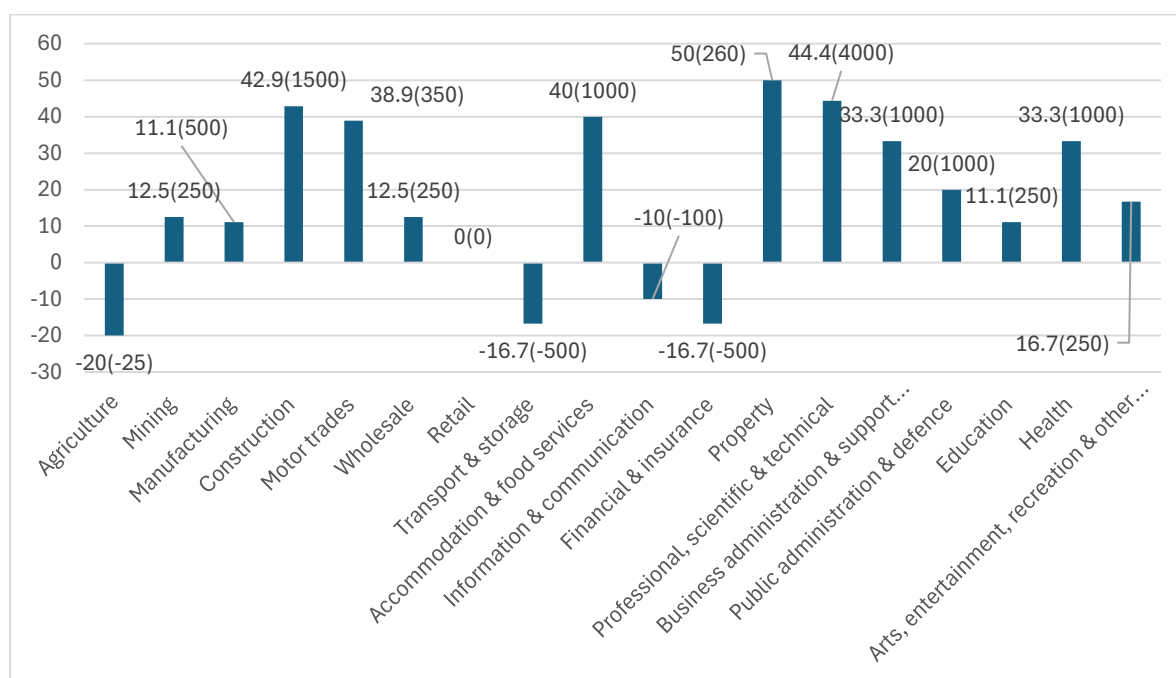
A2.5 Overall, 21,000 staff or nearly a third of the workforce were employed in private office sectors locally. Across Leicester and Leicestershire, only around a quarter of people were employed equivalent sectors, illustrating the importance of private offices to Blaby District.

- A2.6 The next biggest sectors were the retail and public administration which both had 9.4 percent of total employment or 6,000 employees each, again above wider averages, particularly for public administration. The strength of public administration will reflect the fact that LCC, and Leicestershire Police, have their headquarters in Blaby District.
- A2.7 Construction appears to be a local strength, accounting for 7.8 percent of local employment, compared to wider averages of around 5 percent.
- A2.8 Perhaps surprisingly given Blaby District's position on the M1 Corridor and range of associated B2/B8 schemes here, Transport and storage only accounted for 3.9 percent of local employment nearly half the Leicester and Leicestershire average. Employment in ICT, Health and Education was also well below wider averages. In the case of Health, this will partially reflect the fact that Glenfield Hospital falls outside of the district boundary.
- A2.9 Manufacturing had a modest role locally, employing 5,000 in 2022, or 7.8 percent of local employment. This was proportionally in line with the national average but well below county or regional averages.

Growth and decline of sectors, 2015-2022

- A2.10 Figure 2.2 breaks down the change in the number of jobs by sector, over 2015-2022. The Professional, scientific and technical sector saw the greatest increases in jobs over the period observed, with an addition of 4,000 jobs, a 44.4 percent increase. This further shows the local strength this sector.
- A2.11 The other office-based sector to experience large scale growth was Business administration which saw an increase of a third or 1,000 jobs. The Property sector saw an increase of 250 jobs which represented a doubling of employment over 2015-2022.
- A2.12 ICT saw a decline of 10 percent, or 100 jobs and 16.7 percent in Financial and insurance (500 job loss). Overall, the trend in private office sectors has been growth, even allowing for the impacts of the Covid-19 Pandemic and resulting Lockdowns.
- A2.13 Construction which saw a growth of 1500 jobs, although this only represented a modest increase of 11.1 percent.

Figure 2.2 – Change in Employees by Sector, 2015-2022



Source: BRES, 2024 *Left number refers to the percentage change while the right number in brackets is the number of jobs which were gained/lost.

A2.14 Overall trends were for growth, with only four sectors showing decline. Agriculture saw a 20 percent decline, but this only equates to 25 jobs. However, the Transport and storage sector had a 16.7 percent decline and job loss of 500 which was similar to the decline in the Financial and insurance sector. ICT lost 100 jobs, suggesting these are Blaby District’s weaker sectors, in terms of employment.

Number and Sizes of Businesses

A2.15 ONS data identified that as of 2023, there was 4,075 VAT registered businesses operating in Blaby District (see Table 2.2).

Table 2.2 – UK Business Counts, 2023

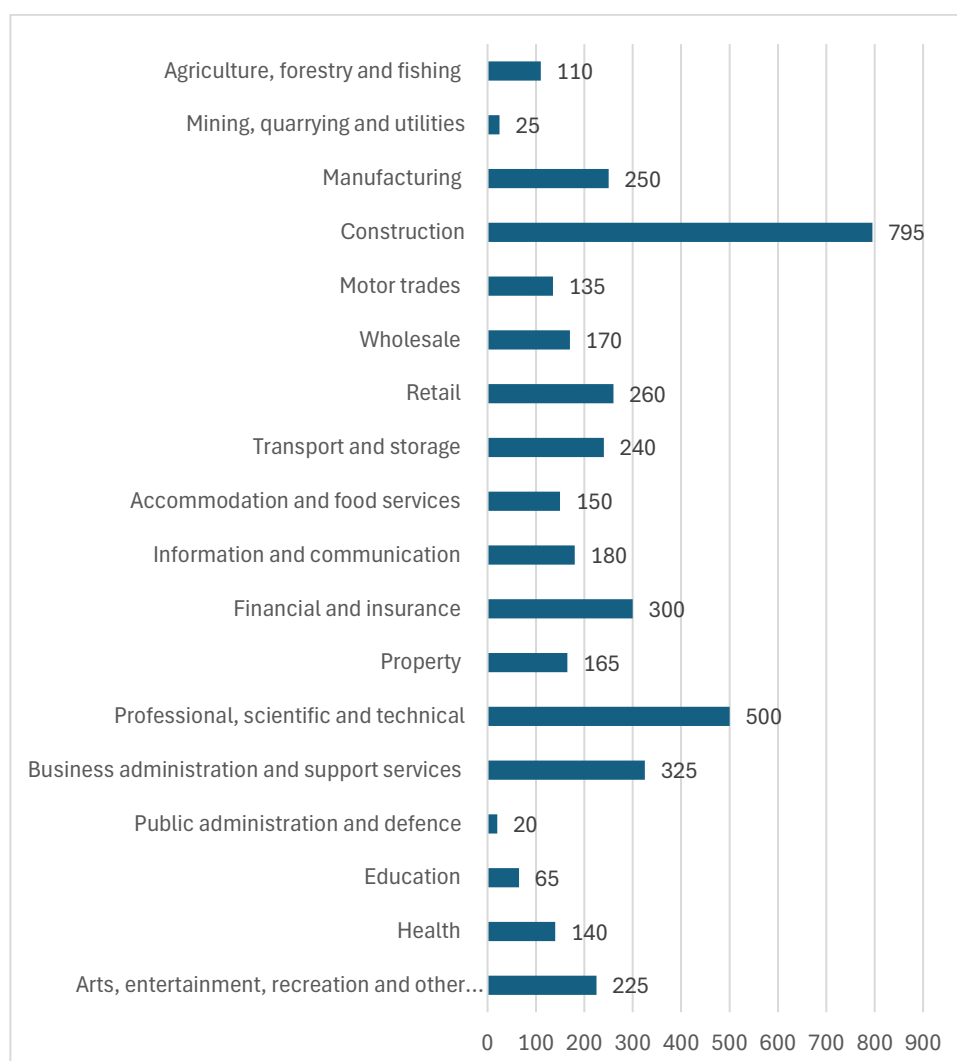
Employment Size band	Blaby		Leicester and Leicestershire	East Midlands	Great Britain
	number	percent	percent	percent	percent
Micro (0 to 9)	3,610	88.5	88.8	88.8	89.1
Small (10 to 49)	375	9.2	9.1	9.2	9
Medium-sized (50 to 249)	70	1.71	1.6	1.6	1.6
Large (250+)	20	0.4	0.4	0.4	0.4
Total	4,075	100	100	100	100

Source: ONS, 2024

A2.16 89.1 percent of businesses in Great Britain employed less than ten people (micro businesses), and 9.0 percent of businesses were classified as small (10-49 employees). Blaby followed the National trend and pattern for both size bands, having 88.5 percent in Micro and 9.2 percent in the small business size band. Next, within the Medium to Large size band, Blaby had 1.7 percent and 0.4 respectively. On the medium sized business, 70 local business were identified, whilst 20 local business were identified as having more than 250 employees. These large businesses may include the head offices noted from the Business structure within Blaby District.

A2.17 The total number of businesses can also be broken down by industry sector, as seen in Figure 2.3.

Figure 2.3 – Business Count by Sector, Numbers (2023)



Source: ONS UK Business Counts, 2024

A2.18 The Construction sector had the highest number of businesses in Blaby District at 750 or 19.6 percent, as noted above, the sector employs reasonable numbers locally and has seen a modest jobs growth since 2015.

A2.19 The Professional and scientific sector accounted for the second largest number of firms, at 500 or 12.3 percent. And as noted above, the sector employs reasonable numbers locally and has seen good jobs growth since 2015. It is clearly a strong sector for the district. Business services, another growth sector in terms of jobs, accommodated another 325 firms locally, eight percent of all local firms. Overall, Blaby District had 1,470 private office-based businesses, equating to almost a third of local firms.

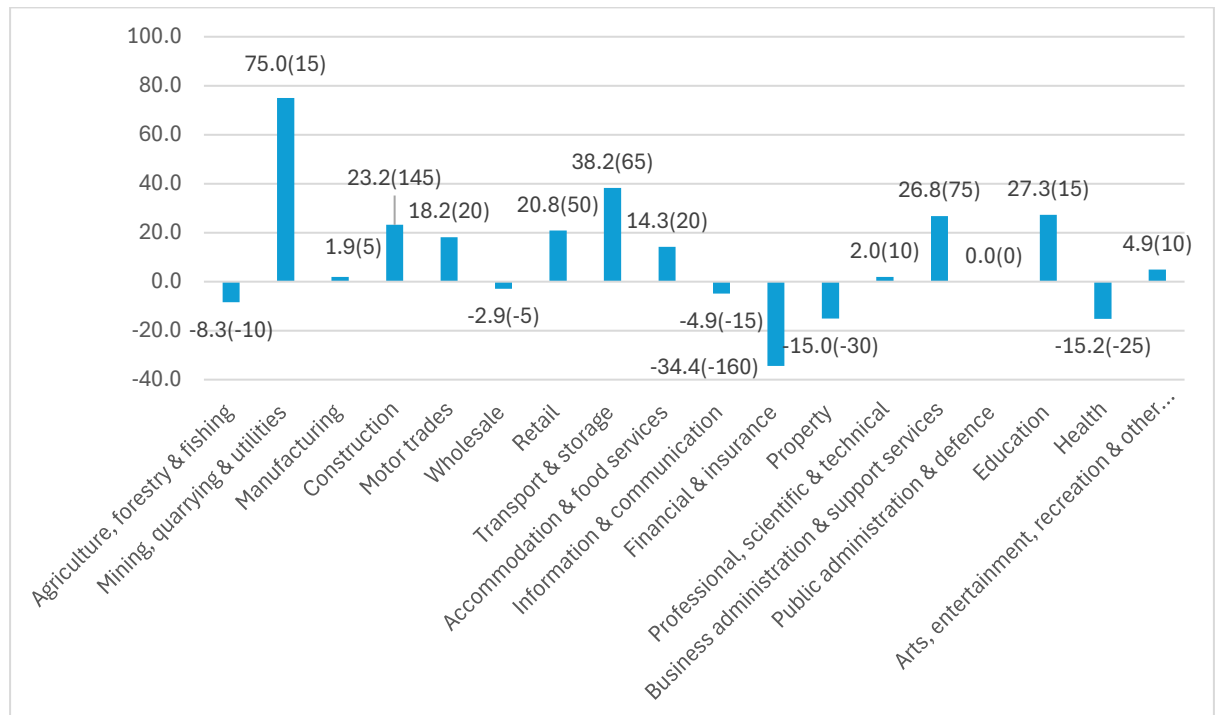
A2.20 There were 250 manufacturing firms locally, a reasonable, but not exceptional number of firms. Notably, there were far fewer Manufacturing firms locally than there were Construction businesses. There were another 240 businesses in the Transport and storage sector.

Business Change by Sector

A2.21 Figure 2.4 illustrates how the total number of businesses within each sector has fluctuated between 2015-2022. 2022 data is used here to allow a comparison between employment growth and business growth and employment growth numbers come from BRES data, the latest release of which is 2022.

A2.22 Whereas, most office sectors, bar ICT and Financial Services, saw strong jobs growth over 2015-2022, only Business administration saw a significant gain in business numbers, and many sectors saw a decline in business numbers. This suggests that the office employment increases occurred within the existing businesses of Blaby District rather than reflecting new businesses starting up here or coming into the district. The Financial and insurance sector lost both jobs and businesses, over this period, suggesting that this is a sector in local decline. The losses have been in pension funding businesses. ICT has also seen a modest decline in local employment and businesses.

Figure 2.4 – Change in Business Numbers, 2015-2022*



Source: ONS UK Business Counts, 2024

*Left number refers to the percentage change while the right number in brackets is the number of businesses/firms which were gained/lost.

A2.23 Comparing change in jobs and business numbers allows the following other key trends to be identified:

- Construction saw steady growth, adding 1500 jobs and 145 companies, which shows the strength of this sector in Blaby District
- The Manufacturing sector gained 500 jobs over 2015-2022, but only five companies. Thus, barring some very significant inward investment, it is assumed that the jobs growth was mostly in existing firms
- The Transport and storage sector saw a good gain in business numbers, an extra 65 or a gain of over a third. This is surprising since the sector lost jobs since 2015. The employment reductions may be a result of an increase in efficiency of logistics activities and increasing automation within the sector.

Appendix 3

Employment Site Proformas

Appendix 3 – Employment Site Proforma

Blaby District Local Plan, Local Plan (Delivery) DPD (2019) Allocations

Site Name	Site 1: Land West of St Johns, Enderby
Owner	Multiple with Drummond Estate and The Inverrock Trust being the main owners.
Agent	The development is being promoted by the Drummond Estate and Landchain,
Size, ha (Net Area to be Developed, ha. Where relevant)	33.30
Planning Status	The site has Outline Consent (App. No. 23/1066/OUT)
Proposal	The proposal is for a B2/B8 industrial park, providing 106,568 sqm of gross external space. The illustrative Masterplan shows five main B2/B8 units of 14,098-43,938 sqm and a scheme of smaller industrial units in the south east. Also referred to as the Enderby Logistics Hub.
Proposed Use Classes	E(g), B2, B8
Constraints	Trees on site Public rights of way cross the site Housing adjacent Includes 'best and most versatile agricultural land'
Comments	The land now has Outline Consent and is being promoted for development by an experienced land promoter. Given the ongoing demand for larger B2/B8 premises in the M1 Corridor, as discussed in Section 3.0, the chances of delivery here are very high.
Availability, years	1-5
Justification for Availability Estimate	Assumes that the site is now being promoted to developers, with the benefit of the Outline Consent. Subject to other planning matters, the ongoing good levels of demand support deliver in a short-mid term time frame.

Other Consented Sites

Site Name	Site 2: Glenfield Park / Optimus Point, Ratby Lane / Kirby Road Residual, Glenfield
Owner	Various
Agent	Various
Size, ha (Net Area to be Developed, ha. Where relevant)	0.59
Planning Status	The site falls within the wider Outline consent for E(g)/B-Class employment development (App. No. 12/0457). With eight key Reserved Matters Consents making up the main development. Part of the Key Employment Site Optimus Point, Glenfield under Policy SA5 – ‘Key Employment Sites and Other Existing Employment Sites’ Blaby District Local Plan, Local Plan (Delivery) Development Plan Document (2019)
Proposal	The last large scale unit, of 8,800 sqm (Unit 20) is currently at a late stage of construction. It is intended to be occupied by Geary’s Bakeries. With the completion of that property all main development plots with Optimus Point will be complete. Other, undeveloped land within the Employment Area falls into the curtilage of occupied properties or is used for environmental mitigation/landscaping.
Proposed Use Classes	N/A
Constraints	N/A
Comments	With the completion of Unit 20, Optimus Point appears practically full.
Availability, years	N/A
Justification for Availability Estimate	

Site Name	Site 3: Land north of Leicester Lane, Lubbesthorpe SES Residual, Lubbesthorpe
Owner	Drummond Estate
Agent	N/A
Size, ha (Net Area to be Developed, ha. Where relevant)	5.52
Planning Status	Part of the Key Employment Site Lubbesthorpe Strategic Employment Site, Lubbesthorpe under Policy SA5 – ‘Key Employment Sites and Other Existing Employment Sites’ Blaby District Local Plan, Local Plan (Delivery) Development Plan Document (2019) No planning consents cover the residual area, but it is covered in the main Outline Consent for New Lubbesthorpe (App. No. 11/0100). This established the principal of the wider 21 ha Strategic Employment Site, of which 5.52 ha remains.
Proposal	Land to the south was developed for two large B8 logistics units, totalling 53,023 sqm, covered under planning App. No. 17/0431. Both units are now developed and let as Leicester Commercial Park. There are no identified plans to develop the residual land. However, this land would be opened up by the new link road, from Dorsey Way north across the M69 to New Lubbesthorpe. This is programmed for the Third Phase of the New Lubbesthorpe development., likely in the later 2020’s.
Proposed Use Classes	None
Constraints	Areas of woodland on the site Public right of way passes through the site Farm buildings adjacent Pond on site
Comments	There are no identified development plans for this land, but it remains available to meet some needs, building on the critical mass of premises which has now been delivered to the south and its strong access to the strategic road network. It now benefits from road access, Dorsey Way, up to the edge of the site. The 5.52 ha site could provide up to 22,000 sqm of gross additional space, large enough to support another larger B2/B8 unit. Its development will be made more likely by the completion of the access route through to New Lubbesthorpe, which will integrate it better into the wider strategic development.
Availability, years	5-10
Justification for Availability Estimate	Market demand for B2/B8 units remains strong, as demonstrated by the recent consent at nearby Site 1: Land West of St Johns, Enderby, making its eventual take up likely. It is most likely to be taken up when the new access route is completed. The link road is programmed in Phase 3 of the New Lubbesthorpe programme, in years’ 10-13 since development started in 2016.

Site Name	Site 4: Sustainable Urban Extension at Lubbesthorpe, Lubbesthorpe
Owner	Primarily the Drummond Estate
Agent	Various
Size, ha (Net Area to be Developed, ha. Where relevant)	2.37
Planning Status	Outline consent (App. No. 11/0100)
Proposal	<p>The wider Outline Consent, secured in 2014, was for:</p> <ul style="list-style-type: none"> • 4,250 dwellings • The Strategic Employment Site (Discussed in Site 3) • The Gateway Business Centre of 4,600 sqm for E(g) Uses • A District Centre, containing a mix of retail, commercial, employment (2,000 sqm of E(g)), community, leisure, waste and residential uses • Two smaller Local Centres containing a mix of retail, community, health, leisure and residential uses. Potentially including 250 sqm of flexible E(g) workspace each • Schools • Health Centre. <p>Development commenced in 2016. As of 30th September 2024, 1,128 homes are occupied, with a primary school, community centre and health facilities completed. None of the E(g) employment facilities have been completed to date, and no Reserved Matters applications have been submitted on the subject.</p> <p>The Business Gateway is programmed for Phase 2, or 7-10 years after scheme start in 2026. While the Outline Consent commits to the ultimate delivery of this scheme, it does allow for it to be brought forward at a later phase if demand does not support its immediate delivery. Thus, this scheme, and other employment floorspace in the District/Local Centres may not ultimately come forward until the 2030s.</p> <p>Road access, Meridian Way, is in place to the identified site for the Gateway.</p>
Proposed Use Classes	E(g)
Constraints	Assumed none on the specific sites to be developed for E(g) Uses
Comments	The Council should seek greater clarity on exactly when, and by whom, the main E(g) uses will be brought forward, and any barriers to delivery.
Availability, years	5-10
Justification for Availability Estimate	Assumes that delivery of E(g) uses is delayed but does ultimately come forward, reflecting commitments made in the Planning Consents, even if the ultimate nature of what is delivered differs from what was originally proposed, to reflect changing demand patterns.

Site Name	Site 5: Airmans Rest Business Park, Ratby Lane, Kirby Muxloe
Owner	Reflex Label Group
Agent	SK Design
Size, ha (Net Area to be Developed, ha. Where relevant)	0.52
Planning Status	Full planning consent (App. No. 21/0303)
Proposal	Proposal is for a 2,237 sqm industrial building, to be developed as a second facility for Reflex Label Group, developed to the north of the existing factory. Development has not commenced as of October 2024.
Proposed Use Classes	B2
Constraints	Foundations of previous buildings on the site
Comments	The development will be for the use of Reflex, on the Reflex site, but the position of the unit means that it could be made available to other businesses, if it became surplus to requirements. Thus, it remains part of the broader land supply for the district.
Availability, years	1-5
Justification for Availability Estimate	Development will likely be driven by the internal operational needs of Reflex, linked to business performance and existing production capacity.

Site Name	Site 6: Land At Everards Meadows, Cooper Way, Enderby
Owner	Everards Brewery
Agent	Marrons Planning
Size, ha (Net Area to be Developed, ha. Where relevant)	1.99
Planning Status	Outline planning consent (App. No. 22/0110)
Proposal	The proposal is for an office campus with a GFA of up to 9,290 sqm together with a hotel of up to 5,575 sqm. This would represent Phase II of the Everards redevelopment, with Phase I being the Brewery and associated leisure, hot food and retail uses which are completed. The new office campus is identified as comprising seven buildings of 372-697 sqm each, to be developed on land in the west, in two defined development plots. No development has commenced as of October 2024
Proposed Use Classes	E(g)(i), C1
Constraints	None, development plots are serviced.
Comments	A reserved matters application for the hotel was submitted in early November 2024 (App. No. 24/0945/RM), suggesting that this will be progressed quite quickly as Phase 2A of Everards Meadows. The offices will comprise Phase 2B and will be the subject of a separate Reserved Matters application. It remains to be seen how quickly the second Reserved Matters application, and the office development will come forward. Experience suggests that office schemes can be difficult to viably deliver, even in prime locations on the strategic road network. High construction costs against the level of rents achievable are frequently an issue. However, new offices have been delivered on nearby employment areas, including Grove Park providing evidence that this scheme can ultimately be achieved. It may require securing developer partners, pre-let/pre-sale occupiers or funding support, however.
Availability, years	5-10
Justification for Availability Estimate	As mentioned, while the office scheme remains deliverable over the long term, it may require the securing of occupiers, developer partners or other forms of funding support, which can be time consuming.

Site Name	Site 7: Land at Enderby Substation, Desford Road, Enderby
Owner	National Grid
Agent	HB197END or Harbour Energy
Size, ha (Net Area to be Developed, ha. Where relevant)	2.16
Planning Status	Full planning consent (App. No. 20/0896/FUL), subject to some variation of conditions consents.
Proposal	Consent is for a Battery Storage Facility with an export capacity of up to 50MW (later increased to 57MW) and associated infrastructure, north of the existing National Grid facility. It will include Battery Storage containers totalling some 51 sqm. The scheme was under construction as of October 2024.
Proposed Use Classes	Specialist but broadly B8
Constraints	Assumed none as the scheme is under construction
Comments	Proposal is for a specialist use, for the main existing occupier. The land, or the developed facility cannot be offered to other businesses or meet general requirements for E(g)/B2/B8 accommodation. For these reasons it is not considered part of the realistic employment land supply for the purposes of this Study.
Availability, years	N/A
Justification for Availability Estimate	

Site Name	Site 8: Former Railway Embankment, Coventry Road, Narborough
Owner	Private Individual
Agent	N/A
Size, ha (Net Area to be Developed, ha. Where relevant)	1.40
Planning Status	Full planning consent (App. No. 92/1358)
Proposal	Proposal for eight industrial units (historic permission) Notwithstanding the view of monitoring that this site is under construction there appears to be little evidence of progress here for some years. The land appears to be in full use for various open storage uses.
Proposed Use Classes	B2
Constraints	Land in use for open storage Possible contamination from existing and previous uses
Comments	Historic planning consent, if it has not been delivered, in full, over 30 years since it was first consented it is unlikely to be so now. Thus, this site is not counted as part of the available supply, for the purposes of this Study.
Availability, years	N/A
Justification for Availability Estimate	

Site Name	Site 9: John Brindley Transport, Aston Lane, Sharnford
Owner	John Brindley
Agent	Wells McFarlane
Size, ha (Net Area to be Developed, ha. Where relevant)	0.18
Planning Status	The site has full planning consent (App. No. 20/1081)
Proposal	<p>The proposal is for the erection of 4 linked portal framed light industrial units which will sit adjacent to the existing commercial light industrial units within the existing commercial complex of buildings at The Farm, the commercial base for John Brindley Transport. These total 1,856 sqm, or 464 sqm each, with two proposed for E(g)(iii) light industrial use and two propose for B8 storage and distribution use.</p> <p>The proposal would comprise an extension to the existing offer of 10 units here (4,900 sqm of floorspace) which are used for third party storage, distribution, light industrial processes and the maintenance of Brindley Transport vehicles. It will meet increased demand from existing commercial tenants and existing John Brindley clients, for longer term storage and distribution to enable stock piling of goods. Development had not commenced as of October 2024.</p>
Proposed Use Classes	E(g)(iii) and B8
Constraints	None (The land is outside of the Flood Risk area for the River Soar)
Comments	<p>Expansion of an existing rural employment area. Most land and premises are in use for John Brindley Transport, but it includes space for other businesses. Development is to meet identified demand so appears likely to progress.</p> <p>ESH Haulage Site, Aston Lane, Sharnford is identified under Policy FV15: 'Employment Areas' of the Fosse Villages Neighbourhood Plan: Update (2018-2029) to be safeguarded for E(g)/B-Class development.</p>
Availability, years	1-5
Justification for Availability Estimate	Reflects the identified demand for the space and the likelihood of development on land owned and operated by the developer, John Brindley Transport, which appears unconstrained.

Site Name	Site 10: Land Southwest of Junction with Stanton Lane and Pingle Lane, Potters Marston
Owner	Dovecote Storage and a Private Individual
Agent	The Planning Hub
Size, ha (Net Area to be Developed, ha. Where relevant)	0.31 (approx. 0.15 ha still uncompleted at this time)
Planning Status	The site has Full Planning Consent (App. No. 22/0595)
Proposal	The change of use of agricultural land to B8 open storage use with 110 storage containers (extension to the existing site). The consent appears to have been partially implemented in the north, which is now in use for container storage in a layout consistent with the application drawings.
Proposed Use Classes	B8
Constraints	Assumed none given the partial implementation
Comments	-
Availability, years	1-5
Justification for Availability Estimate	The scheme has been partially implemented; it is assumed implementation of the remainder will be driven by demand for space and the capacity of the existing containers.

Appendix 4

Blaby Sites Scoring System

Appendix 4 – Blaby Site Scoring System

Site Location and Access	Proximity to strategic highway network	<ul style="list-style-type: none"> • Site adjacent to primary route (strategic highways network) - M1, M69, A5, A46, A47, A50, A563 – score 10 • Site 0.5 km from primary route – score 9 • Site 1.0 km from primary route – score 8 • For each further half km distance from the junction, reduce score by one point. Any site 5.0 km or further from primary route scores zero.
	Proximity to routes within the local network	<p>Proximity to key local highways route (A5460, A426, A582, B4114, B581):</p> <ul style="list-style-type: none"> • Site within 1.0 km from key local highways route junction – score 10 • Site within 5.0 km from key local highways route junction – score 6 • Site within 10.0 km from key local highways route junction – score 3 • Site more than 10.0 km from key local highways route junction – score 0.
	Prominence	<ul style="list-style-type: none"> • Site adjacent to, and visible from M1, M69, A5, A46, A47, A50, A563 – score 10/9 • Site adjacent to, and visible from key routes within the local network (A5460, A426, A582, B4114, B581 – score 8/7 • Site adjacent to, and visible from another A road – score 6/5 • Site has local prominence, for example, within its industrial location – score 4/3 • Site located in 'backlands' – score 2/1/0
	Public Transport	<ul style="list-style-type: none"> • Site close to bus route (within 0.5 km) and near to rail station (within 2 km) – score 10 • Site within 0.5 km of a bus route – score 5 • Limited public transport – score 0
Planning Status		<ul style="list-style-type: none"> • If site has detailed/full planning status – score 10 • If site has outline planning status – score 8 • If site allocated in the development plan – score 4 • If site is available, subject to planning – score 1
Site Conditions	Services Availability	<ul style="list-style-type: none"> • If all services are provided and in place – score 10 • If priority services are available with no abnormal costs – score 7 • If all priority services are available, but with abnormal costs – score 3 • Some services are unavailable – score 0
	Constraints	<p>May be physical (including access), planning, or legal</p> <p>Reduce score by 2 for each constraint</p> <p>If there are none – score 10</p>
	Environmental Setting	<p>Subjective, score 0 to 10, examples:</p> <ul style="list-style-type: none"> • Good quality business park/greenfield location – score 10 • Moderate quality industrial estate – score 5

		<ul style="list-style-type: none"> • Poor quality industrial estate/in-fill location – score 2
	Flexibility	<p>Subjective, score 0 to 10: Score site in terms of site shape and ability to sub-divide to suit smaller occupiers. Consider the site within its context/category. Score 10 if it is flexible, 0 if it is inflexible.</p>
Site Availability		<ul style="list-style-type: none"> • Site available to develop within 0-1 year – score 10 • Site available to develop within 1-5 years – score 8 • Site available to develop 5-10 years – score 6 • Site available to develop 1-15 years – score 4 • Site available to develop 15+ years – score 0

Source: BE Group, 2024

Appendix 5

Blaby Sites Scoring Assessment

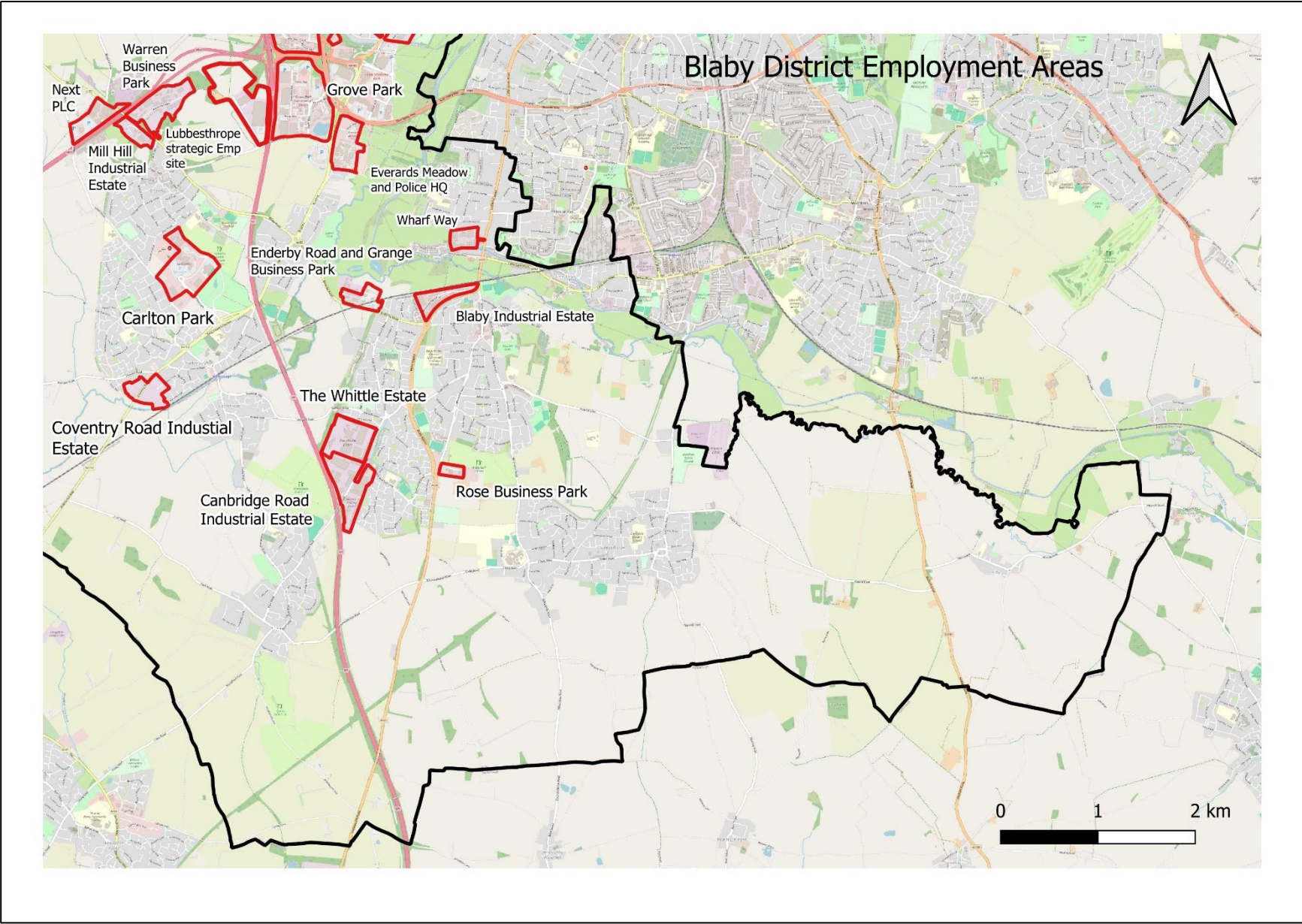
Appendix 5 - Blaby District Sites Scoring Assessment - Realistic Supply

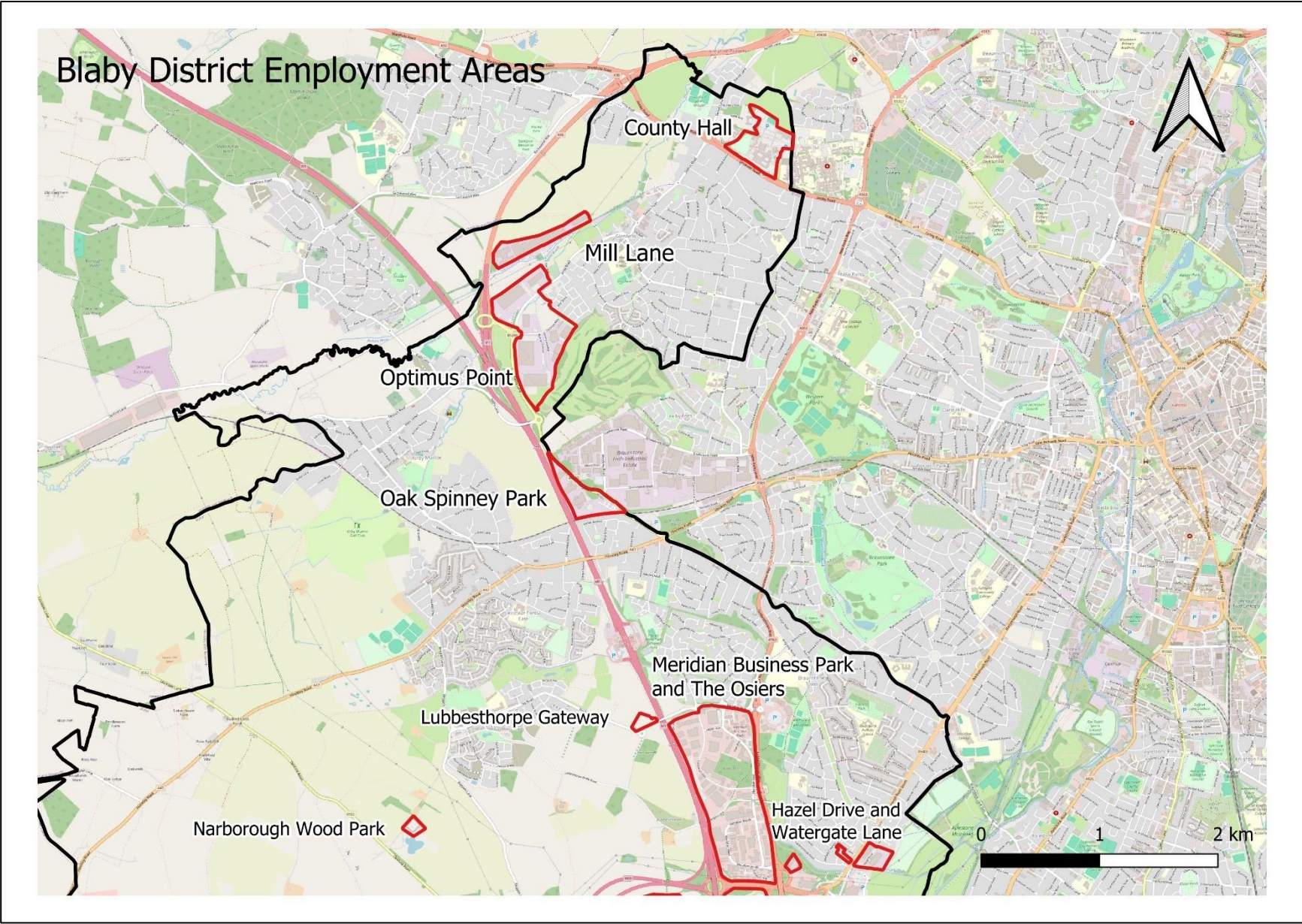
Site Name	Site Size, ha	Strategic Highway Proximity	Key Local Route Proximity	Prominence	Public Transport	Planning Status	Services Availability	Constraints	Environmental Setting	Flexibility	Site Availability	Total	Constraints
Site 1: Land West of St Johns, Enderby	33.30	9	10	10	10	8	7	2	10	10	8	84	<ul style="list-style-type: none"> • Trees on site • Public rights of way cross the site • Housing adjacent • Includes 'best and most versatile agricultural land'
Site 6: Land At Everards Meadows, Cooper Way, Enderby	1.99	10	10	10	5	8	10	10	10	4	6	83	None, development plots are serviced
Site 3: Land north of Leicester Lane, Lubbesthorpe SES Residual, Lubbesthorpe	5.52	6	6	10	5	8	7	2	10	8	6	68	<ul style="list-style-type: none"> • Areas of woodland on the site • Public right of way passes through the site • Farm buildings adjacent • Pond on site
Site 4: Sustainable Urban Extension at Lubbesthorpe, Lubbesthorpe	2.37	8	6	4	5	8	7	10	10	4	6	68	None
Site 5: Airmans Rest Business Park, Ratby Lane, Kirby Muxloe	0.52	8	6	4	5	10	10	8	5	2	8	66	<ul style="list-style-type: none"> • Foundations of previous buildings on the site
Site 9: John Brindley Transport, Aston Lane, Sharnford	0.18	3	10	2	5	10	10	10	3	1	8	62	None (The land is outside of the Flood Risk area for the River Soar)
Site 10: Land Southwest of Junction with Stanton Lane and Pingle Lane, Potters Marston	0.15	0	6	2	5	10	7	10	5	1	8	54	Assumed none given the partial implementation.

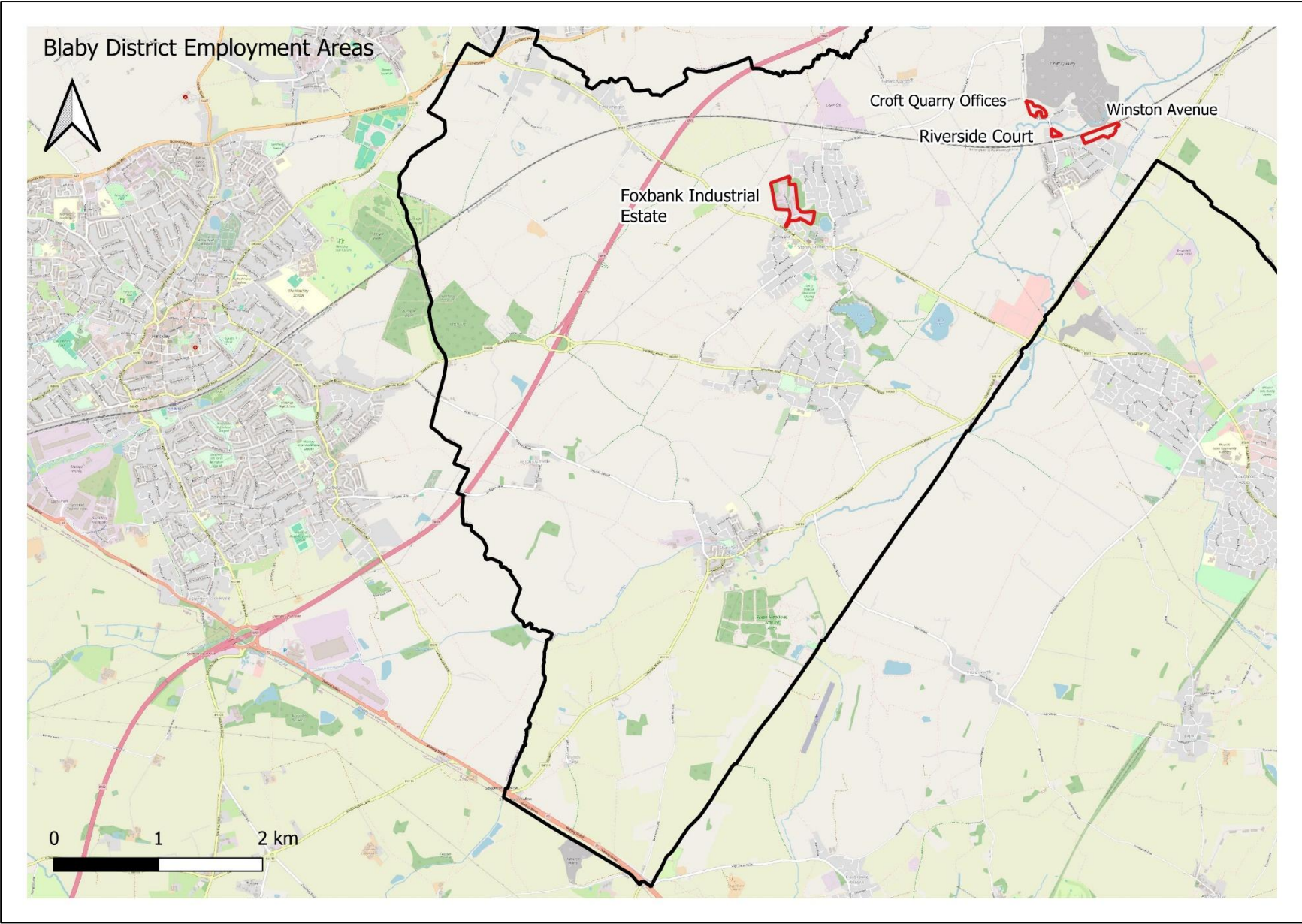
Source: BE Group, 2025

Appendix 6

Blaby Employment Areas Mapping







Appendix 7

Forecast Working

Appendix 7 – Forecast Working

Table A7.1 – Forecast 2024-2041 Gross of Homeworking

SIC Group	Workforce Growth 2024-41	Percentage Occupying B1/2/8 Space	Growth Number of Jobs on B1/2/8 Space	Floorspace Per Job (sqm)	Floorspace Required (sqm)
Agriculture etc	-41	5	-2	14	-29
Mining and quarrying	-47	5	-2	14	-33
Manufacturing	-398	100	-398	49	-19,502
Electricity, gas and water	129	26	34	14	470
Construction	1315	26	342	14	4,787
Distribution	518	5	26	77	1,994
Transport and storage	128	48	61	77	4,731
Accommodation and food services	-76	0	0		0
Information and communications	110	100	110	14	1,540
Financial and business services	-717	100	-717	14	-10,038
Government services	806	22	177	14	2,482
Other services	66	0	0		0
Total	1792		-369		
Increase in Floorspace – Growth Sectors (sqm)					15,975
Decline in Floorspace – Declining Sectors (sqm)					- 29,602
Net Change in Floorspace Demand (sqm)					- 13,626
Office (inc. Research and Development) Land Need					-0.2
Industrial Land Need					-4.6
Warehouse Land Need					1.7

Table A7.2 – Forecast 2024-2041 Net of Homeworking

SIC Group	Workforce Growth 2024-41	Percentage Occupying B1/2/8 Space	Growth Number of Jobs on B1/2/8 Space	Floorspace Per Job (sqm)	Floorspace Required (sqm)
Agriculture etc	-29	5	-1	14	-20
Mining and quarrying	-33	5	-2	14	-23
Manufacturing	-398	100	-398	49	-19,502
Electricity, gas and water	90	26	23	14	328
Construction	918	26	239	14	3,342
Distribution	518	5	26	77	1,994
Transport and storage	128	48	61	77	4,731
Accommodation and food services	-76	0	0		0
Information and communications	77	100	77	14	1,078
Financial and business services	-500	100	-500	14	-7,000
Government services	562	22	124	14	1,731
Other services	66	0	0		0
Total	1323		-351		
Increase in Floorspace – Growth Sectors (sqm)					13,203
Decline in Floorspace – Declining Sectors (sqm)					- 26,545
Net Change in Floorspace Demand (sqm)					- 13,342
Office (inc. Research and Development) Land Need					-0.2
Industrial Land Need					-4.6
Warehouse Land Need					1.7

Table A7.3 – Forecast 2024-2046 Gross of Homeworking

SIC Group	Workforce Growth 2024-41	Percentage Occupying B1/2/8 Space	Growth Number of Jobs on B1/2/8 Space	Floorspace Per Job (sqm)	Floorspace Required (sqm)
Agriculture etc	-53	5	-3	14	-37
Mining and quarrying	-56	5	-3	14	-39
Manufacturing	-474	100	-474	49	-23,226
Electricity, gas and water	179	26	47	14	652
Construction	1591	26	414	14	5,791
Distribution	642	5	32	77	2,472
Transport and storage	161	48	77	77	5,951
Accommodation and food services	-113	0	0		0
Information and communications	134	100	134	14	1,876
Financial and business services	-907	100	-907	14	-12,698
Government services	1041	22	229	14	3,206
Other services	79	0	0		0
Total	2224		-454		
Increase in Floorspace – Growth Sectors (sqm)					19,947
Decline in Floorspace – Declining Sectors (sqm)					- 35,963
Net Change in Floorspace Demand (sqm)					- 16,016
Office (inc. Research and Development) Land Need					-0.4
Industrial Land Need					-5.5
Warehouse Land Need					2.1

Table A7.4 – Forecast 2024-2046 Net of Homeworking

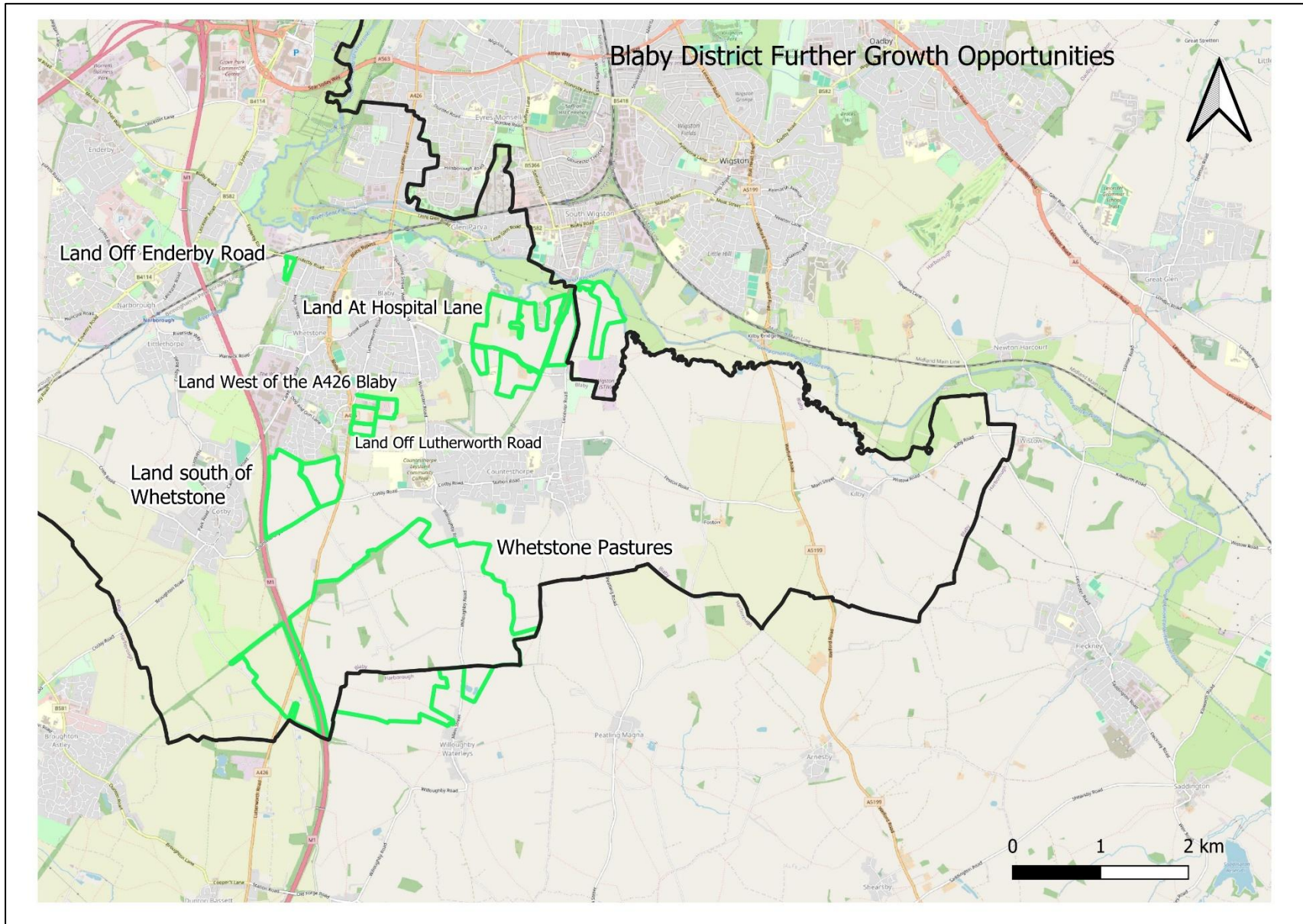
SIC Group	Workforce Growth 2024-41	Percentage Occupying B1/2/8 Space	Growth Number of Jobs on B1/2/8 Space	Floorspace Per Job (sqm)	Floorspace Required (sqm)
Agriculture etc	-37	5	-2	14	-26
Mining and quarrying	-39	5	-2	14	-27
Manufacturing	-474	100	-474	49	-23,226
Electricity, gas and water	125	26	33	14	455
Construction	1111	26	289	14	4,044
Distribution	642	5	32	77	2,472
Transport and storage	161	48	77	77	5,951
Accommodation and food services	-113	0	0		0
Information and communications	94	100	94	14	1,316
Financial and business services	-633	100	-633	14	-8,862
Government services	727	22	160	14	2,239
Other services	79	0	0		0
Total	1641		-426		
Increase in Floorspace – Growth Sectors (sqm)					16,476
Decline in Floorspace – Declining Sectors (sqm)					- 32,141
Net Change in Floorspace Demand (sqm)					- 15,665
Office (inc. Research and Development) Land Need					-0.2
Industrial Land Need					-5.5
Warehouse Land Need					2.1

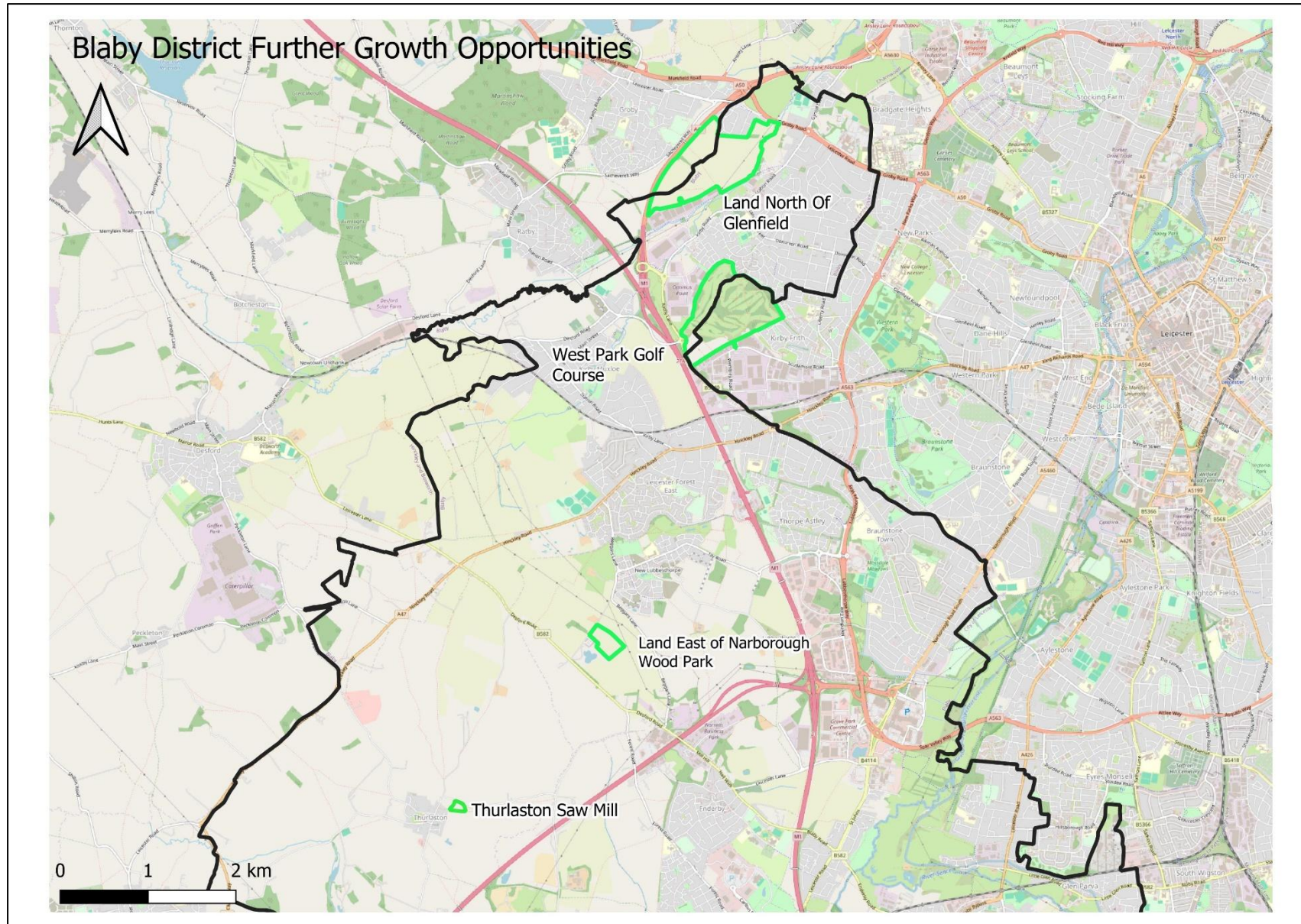
Table A7.5 – Historic Forecast 2006-2024

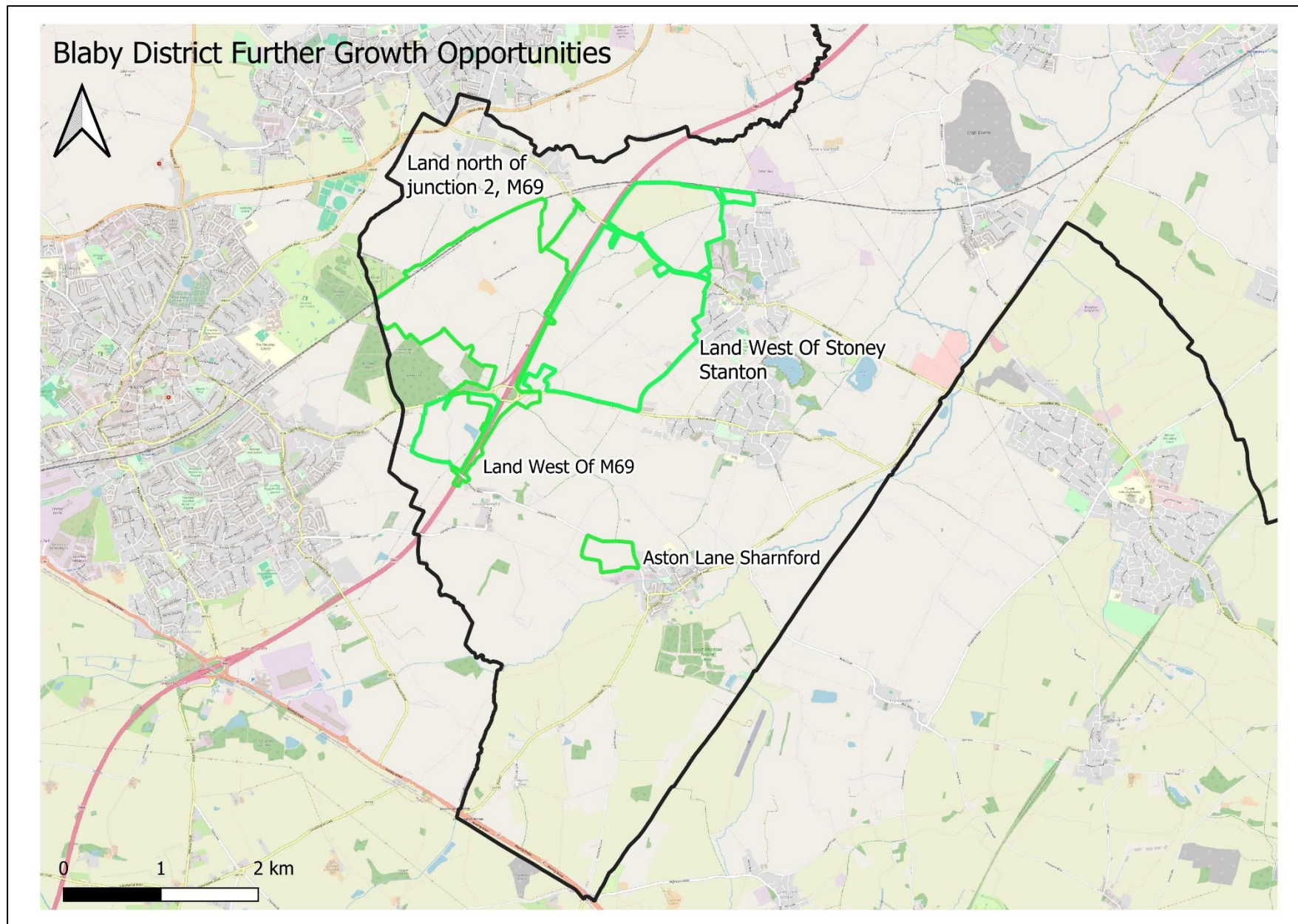
SIC Group	Workforce Growth 2006-24	Percentage Occupying B1/2/8 Space	Growth Number of Jobs on B1/2/8 Space	Floorspace Per Job (sqm)	Floorspace Required (sqm)
Agriculture etc	-77	5	-4	14	-54
Mining and quarrying	-46	5	-2	14	-32
Manufacturing	1049	100	1,049	49	51,401
Electricity, gas and water	-221	26	-57	14	-804
Construction	2035	26	529	14	7,407
Distribution	-2016	5	-101	77	-7,762
Transport and storage	-341	48	-164	77	-12,603
Accommodation and food services	546	0	0		0
Information and communications	123	100	123	14	1,722
Financial and business services	9514	100	9,514	14	133,196
Government services	1806	22	397	14	5,562
Other services	422	0	0		0
Total	12795		11,284		
Increase in Floorspace – Growth Sectors (sqm)					199,289
Decline in Floorspace – Declining Sectors (sqm)					- 21,256
Net Change in Floorspace Demand (sqm)					178,033
Office (inc. Research and Development) Land Need					42.0
Industrial Land Need					12.2
Warehouse Land Need					-5.1

Appendix 8

Blaby Further Growth Options Mapping







Appendix 9

Developer Marketing Standards

Appendix 9 – Developer Marketing Standards

A9.1 Where a sites or premises' owner is applying to a Local Authority for change of use from employment to an alternative use, they must prove there is a lack of demand for that site or premises.

A9.2 This table itemises the various marketing tools that should typically be used to market the interest.

A9.3 Should these tools fail to identify potential purchasers or occupiers then it may be considered that there is a lack of employment demand for the site or premises in question.

Table A9.1 – Developer Marketing Standards

Marketing Tool	Premises	Site, 0-2 ha	Site, 2+ ha
On-site Marketing Board in prominent position	✓	✓	✓
Local Property Agent	✓	✓	✓
Regional Property Agent (joint or sole)	✓		✓
Liaise with Blaby District Council	✓	✓	✓
Produce Marketing Particulars (in hard copy/PDF)	✓	✓	✓
Targeted mailing to Local/County/Regional Property Agents (Internet)	✓	✓	✓
Targeted mailing to Local/County/Regional Property Developers/Investors (Internet)	✓	✓	✓
Targeted mailing to UK Property Agents/Developer/Investors (Internet/postal)			✓
Targeted mailing to selected potential occupiers (large local companies) (Postal)	✓	✓	✓
Advertise in Local/County/Regional Business Press		✓	✓
Advertise in UK Property Press			✓
Website	✓	✓	✓
Internet Mailing to Targeted Business Sectors (e-shot type mailing)	✓	✓	✓
Marketing Period, months	6-12	6-12	9-18

Source: BE Group, 2024