

# Report

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## Employment Land Review

Selby District Council

August 2016 [with Sites update May 2018]



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**For and on behalf of GVA Grimley Ltd**

# 1. Introduction

## Background

1.1 This report dated August 2016 forms a revised Selby District Employment Land Review (ELR) that wholly replaces the Draft ELR prepared by GVA (GVA) that was the subject of public consultation in June 2015. The ELR has been updated for a number of reasons. These include:

- The preparation of the Selby Council Economic Strategy Consultation Draft August 2016;
- To reflect the most up to date economic modelling data;
- The setting up of the PLAN Selby sites database to inform the preparation of PLAN Selby;
- The development and adoption of the PLAN Selby site assessment criteria to inform the allocations process;
- To address the comments made on the 2015 Draft ELR where appropriate.

1.2 This revised report sets out the processes and findings of the updated ELR. The ELR has been produced taking into account the office of the Deputy Prime Minister (as was) guidance on conducting ELR's (Employment Land Reviews – Guidance Note, 2004) (referred to as 'the guidance') considered in light of more recent policy including the National Planning Policy Framework (NPPF) and National Planning Policy Guidance (PPG).

1.3 This ELR has since been further updated in May 2018 in Sections 3 and 5, only in relation to the sites included, to align with the PLAN Selby database.

## Report structure

1.4 The remainder of this report is structured as follows [with clarification as to the dates on which the sections were written noted]:

- Section 2 – Baseline review [August 2016]
- Section 3 – Employment land supply [May 2018]
- Section 4 – Projecting the demand for employment land [August 2016]
- Section 5 – Balancing supply and demand [May 2018]



## 2. Baseline review

2.1 The first part of the baseline review highlights the key themes and recommendations of relevance for the ELR identified in national, regional, sub-regional and local planning and economic policy. The second part of the review identifies the key socio-economic characteristics of Selby. The third part of the review sets out the key findings of our commercial market assessment. The fourth part of the review reflects the perspectives of local businesses. The fifth part of the review sets out the position of adjacent local authorities and their role in relation to Selby in the context of employment land supply. The sixth part of the review summarises the characteristics of the Functional Economic Areas identified for Selby.

### Planning Policy and Strategy

#### National Planning Policy

2.2 The recommendations within this ELR are directly informed by an understanding of the wider policy and strategy context in which it sits. This includes recognition of national through to sub-regional and local policy priorities.

2.3 The national policy position is set out within the National Planning Policy Framework (NPPF) and the National Planning Policy Guidance (PPG). Key principles within these documents include:

- the commitment to securing economic growth in order to create jobs and prosperity, including a presumption in favour of sustainable development;
- the need to plan proactively to meet the development needs of business and support an economy fit for the 21st century;
- the avoidance of long term protection of sites allocated for employment use where there is no reasonable prospect of it being used for that purpose;
- a duty for public bodies to co-operate on planning issues that cross administrative boundaries, including for strategic priorities such as economic development requirements and land supply; and

- a requirement to identify objectively assessed development need, on a functional economic area basis.
- 2.4 Key paragraphs of relevance in the NPPF include paragraphs 18 to 22 relating to ‘building a strong, competitive economy’.
- 2.5 Paragraph 18 states: The Government is committed to securing economic growth in order to create jobs and prosperity, building on the country’s inherent strengths, and to meeting the twin challenges of global competition and of a low carbon future.
- 2.6 Paragraph 19 states: The Government is committed to ensuring that the planning system does everything it can to support sustainable economic growth. Planning should operate to encourage and not act as an impediment to sustainable growth. Therefore significant weight should be placed on the need to support economic growth through the planning system.
- 2.7 Paragraph 20 states: To help achieve economic growth, local planning authorities should plan proactively to meet the development needs of business and support an economy fit for the 21st century.
- 2.8 Paragraph 21 states: Investment in business should not be over-burdened by the combined requirements of planning policy expectations. Planning policies should recognise and seek to address potential barriers to investment, including a poor environment or any lack of infrastructure, services or housing. In drawing up Local Plans, local planning authorities should:
- set out a clear economic vision and strategy for their area which positively and proactively encourages sustainable economic growth;
  - set criteria, or identify strategic sites, for local and inward investment to match the strategy and to meet anticipated needs over the plan period;
  - support existing business sectors, taking account of whether they are expanding or contracting and, where possible, identify and plan for new or emerging sectors likely to locate in their area. Policies should be flexible enough to accommodate needs not anticipated in the plan and to allow a rapid response to changes in economic circumstances;
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- plan positively for the location, promotion and expansion of clusters or networks of knowledge driven, creative or high technology industries;
  - identify priority areas for economic regeneration, infrastructure provision and environmental enhancement; and
  - facilitate flexible working practices such as the integration of residential and commercial uses within the same unit.
- 2.9 Paragraph 22 states: Planning policies should avoid the long term protection of sites allocated for employment use where there is no reasonable prospect of a site being used for that purpose. Land allocations should be regularly reviewed. Where there is no reasonable prospect of a site being used for the allocated employment use, applications for alternative uses of land or buildings should be treated on their merits having regard to market signals and the relative need for different land uses to support sustainable local communities.
- 2.10 The enactment of the Localism and Decentralisation Bill in November 2011 marked the end of employment targets and policy at the regional scale, emphasising the importance of having a credible and robust evidence base to justify employment requirements at the local level. This included the abolition of the regional planning structures in place across the country.

### Selby District Core Strategy (October 2013)

- 2.11 At local level, the adopted Selby District Core Strategy (October 2013) sets out the scale of distribution of new employment development to be planned for over the period, based on the recommendations of the 2007 Employment Land Study (produced by GVA Grimley) and the Selby District Employment Land Refresh 2010.
- 2.12 Core Strategy Policy SP13 states that the Council will support the provision for an additional 37 – 52 ha of land for employment development to be brought forward across the District in the period up to 2027.
- 2.13 The policy provides an Indicative Employment Land Distribution in the supporting text with:

- Selby and Hinterland providing 22-27 hectares,
- Tadcaster providing 5-10 hectares,
- Sherburn in Elmet providing 5-10 hectares, and
- The rural areas (including Eggborough and A19 corridor) providing 5 hectares.

2.14 The emphasis will be on focusing higher value Business, Professional and Financial Services/B1 office development in and around Selby town centre and the urban periphery. Tadcaster is seen as a suitable location for knowledge based employment activity, complementary to Selby. Outside Selby and the Local Service Centres, a continuing need for sustainable local employment opportunities in rural areas has been identified.

2.15 Core Strategy Policy SP13 also supports proposals for modernisation, expansions, redevelopment, re-use and intensification of existing employment sites and premises within defined Development Limits.

2.16 Core Strategy Policy SP7 states that within the provision, 23ha of employment land forms part of the Olympia Park mixed strategic housing/employment site to the east of Selby to meet the needs of both incoming and existing employment uses. The employment land will include B1 offices, B1 and B2 industrial units and B8 storage and distribution premises. Policy SP7 also safeguards 10.6 ha of land for longer term employment use.

2.17 In terms of housing approximately half of new housing will be located within or adjacent to Selby as the most sustainable settlement within the District (para 5.18). It is considered that the most sustainable way of delivering the number of new properties required is through a combined strategic housing / employment site to the east of the town in the area contained by the River Ouse and Selby bypass (Olympia Park). This will provide about 1,000 dwellings equivalent to 40% of the new allocations required in Selby urban area (para 5.19).

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## Core Strategy Background Paper – Promoting Economic Prosperity (January 2011)

- 2.18 The aim of this Background Paper was to set out how the Core Strategy policies have been developed throughout the LDF process.
- 2.19 The Background Paper set out that Selby District has important economic connections with the Leeds City Region and the York and North Yorkshire economy. It quotes the findings of the York and North Yorkshire Local Economic Assessment which suggests that Selby contributes 11 per cent to the York and North Yorkshire sub regional economy.

## Selby District Local Plan (February 2005)

- 2.20 The Selby District Local Plan (SDLP) was formally adopted 8 February 2005 with a number of the policies expiring on 7 February 2008. All other policies were saved by Direction of the Secretary of State. Further to this a number of other policies have been superseded by the Selby District Core Strategy when adopted in October 2013.
- 2.21 Saved Policy EMP2 states that new employment development will be concentrated in and around Eggborough, Selby, Sherburn in Elmet and Tadcaster and encouragement will be given to proposals for small-scale development in villages and rural areas in support of the rural economy.
- 2.22 Saved Policy EMP3 advises on sites which have planning permission for employment development and applications for the renewal of existing or expired planning consents for industrial and business development. It states that these will be permitted on such sites unless there has been a material change in circumstances since the previous permission or if a continued failure to begin the development will result in a shortfall of employment land supply within the locality before the end of the plan period.
- 2.23 Saved Policy EMP4 states that development proposals which would result in the loss of industrial/business floorspace within established employment areas will not be permitted unless there are significant environmental, highway or community benefits, the supply of industrial/business land and premises is sufficient to meet the requirements over the plan period or evidence can be provided that no suitable industrial / business occupier can be found.

- 2.24 Saved Policy EMP6 states that within allocated sites and established employment areas proposals for new industrial and business development will be permitted provided there is no significant adverse effect on existing businesses and they would not adversely affect highway safety or local amenity.
- 2.25 Elsewhere within the defined development limits such development will be permitted provided the nature and scale of the proposal is appropriate to the locality, it does not prejudice the future comprehensive development of the land and would not adversely impact on the character of the area or result in a loss of open space.
- 2.26 Saved Policy EMP9 states that proposals for the expansion and/or redevelopment of existing industrial and business uses outside development limits and established employment areas will be permitted provided it does not impact adversely on highway safety or on the character and appearance of the area, and it is of a high standard of design and would not result in the loss of best and most versatile agricultural land.
- 2.27 Saved Policy EMP11 states that in exceptional circumstances, large-scale business or industrial development for occupation by a single large operator may be permitted provided it would result in substantial employment benefits, it would not be situated within the Green Belt or other areas of significance and it would not result in loss of best and most versatile agricultural land.

## Employment Land Studies

### Employment Land Study (2007)

- 2.28 The Employment Land Study produced by GVA Grimley in 2007 identifies that Selby plays an important role in supplying skilled labour to surrounding towns and cities. This is a significant sub-regional role, however it results in the perpetuation of the District as a 'dormitory' location.
- 2.29 The Study recommended that the District sought to allocate additional land for B1 office development within the town centre. It also recommended that existing employment locations should be sufficiently protected from development for other uses (including specifically residential but also leisure and retail) through the LDF.
- 2.30 The Employment Land Study identified that 21 hectares of employment land should be provided by 2021.
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### Employment Land Review Refresh 2010

- 2.31 The Refresh reviews the potential of existing employment land to meet future requirements.
- 2.32 The document states that there is an over-representation of manufacturing and energy sector jobs and floorspace in Selby District, particularly around the settlements of Sherburn and Selby. Whilst the ELR identifies 224.49 ha of potentially available employment land, the majority of sites (75%) are clustered within the Selby Town sub area and 67% of the total supply is considered to be constrained.
- 2.33 108 employment related premises are identified by the report as being currently available but generally, the current stock of employment premises is considered to be out-dated and lacking in terms of purpose-built B1 office accommodation.
- 2.34 The report concludes that the district's current employment land supply may not be suitable for meeting all future business needs.

### Employment Land Review Consultation Draft (June 2015)

- 2.35 As stated above, a Draft ELR was prepared by GVA and was the subject of public consultation in June 2015. This ELR wholly replaces that consultation draft. Where relevant, the content of this 2015 ELR has been carried forward into this document.

## Economic Strategy

### Local Enterprise Partnerships (LEPs)

- 2.36 Local Authorities were invited by Government in June 2010 to submit proposals for Local Enterprise Partnerships (LEPs).
- 2.37 The definition of LEPs as stated by the Department for Communities and Local Government (DCLG) is locally-owned partnerships between local authorities and businesses formed to play a central role in determining local economic priorities and undertaking activities to drive economic growth and the creation of local jobs. It also sees them as a key vehicle in delivering Government objectives for economic growth and decentralisation, whilst also providing a means for local authorities to work together with business in order to quicken the economic recovery.

2.38 Selby District is covered by two LEPs – the Leeds City Region LEP, and the York, North Yorkshire and East Riding LEP.

### The Leeds City Region LEP

2.39 The Leeds City Region Local Enterprise Partnership (referred to as ‘the Leeds LEP’) covers the local authority districts of Barnsley, Bradford, Calderdale, Craven, Harrogate, Kirklees, Leeds, Selby, Wakefield and York. The Leeds City Region is the largest City Region economy outside London and has the potential to become an economic powerhouse. The Leeds LEP’s aim is to overcome barriers to private sector growth and create more opportunities for businesses to develop and provide jobs.

2.40 The Leeds City Region Strategic Economic Plan (SEP) was agreed with Government in July 2014 with the stated ambition to deliver an additional £5.2 billion in economic output and an extra 62,000 jobs in the Leeds City Region by 2021. It was updated to form the Leeds City Region SEP 2016 – 2036 in May 2016.

2.41 The SEP sets out 4 strategic priorities:

- Growing businesses;
- Skilled people, better jobs;
- Clean energy and environmental resilience;
- Infrastructure for growth.

2.42 The SEP identifies Selby District as having the following characteristics:

- Highly skilled residents and paid employees, many of whom travel each day to Leeds, York and beyond;
- Notable strengths in manufacturing, distribution, construction and energy production; drawing its employees from the district’s market towns and villages as well as neighbours including the East Riding, Wakefield and Doncaster;
- Large scale development sites offer significant scope for business growth.



- 2.43 Looking ahead, the SEP states that the district has a key role to play in providing space for business growth in the Leeds City Region. Three key sites provide the focus for this, including; 'Sherburn 2', adjacent to Sherburn Enterprise Park, on the border of Leeds and aligned to the growth aspirations set out for the east of the city; the redevelopment of Kellingley Colliery, a possible catalyst for large scale growth around junction 34 of the M62; and Olympia Park, a large mixed use strategic development site at the end of a potential growth corridor along the A19 for the bioscience and agricultural-technology sectors.
- 2.44 We have consulted directly with the LEP, who stated that at present the Leeds LEP are currently undertaking a Leeds City Region Employment Land Review, however this is not yet publically available.
- 2.45 The LEP stated that Selby District is a key part of the Leeds City Region, with inward investment opportunities, which has been demonstrated by the recent L&G investment in Sherburn in Elmet. The LEP believes that the L&G investment deal shows the "benefits of working collaboratively" with the LEP and neighbouring local authorities, which will inevitably maximise the benefits of inward investment in to the area.
- 2.46 Selby, like most other local authorities with interests in the Leeds LEP, is positioned for job growth. This is inherently intertwined with the housing market which is anticipated to see growth.
- 2.47 The energy sector (carbon capture & storage as well as power generation / opportunities at previously used mining sites), and manufacturing and distribution and logistics are identified as likely to be key contributors to the LEP economy.
- 2.48 The LEP has stated that Selby's key challenges for growth are likely to be change. The phasing out of old coal-fired power stations is an area will require a sympathetic response. However, on the other hand, transport related opportunities in Selby are likely to drive growth regardless.
- 2.49 In terms of barriers to growth, the LEP identified: challenges related to gaining planning permission, the ongoing effects of the market crash and global recession, and site owners holding out for unrealistic land prices.

- 2.50 The LEP stated that by working with partners, LEPS, local authorities and the combined authority to provide connected infrastructure and to promote the area as a whole, Selby will inevitably benefit in the long term with economic growth and employment development.
- 2.51 We also consulted with the LEP in 2015 via email. They stated that Selby is well positioned to contribute to the drive for 'more and better jobs' – increasing the number of high wage, highly skilled jobs within the City Region. The LEP noted that 40% of people in Selby are educated to degree level, compared to 35% nationally.
- 2.52 They stated that one of the LEP's key ambitions is to build a highly resource-efficient economy and Selby is deemed to be well placed to assist with meeting this ambition through the strengths of the energy sector in the locality.
- 2.53 It was noted that Selby has excellent transport links which are also a driver for the thriving transport and storage sector where employment is more than twice the national average, with 10% of employment in Selby in this sector; with the two main sectors being manufacturing and education.

### The York, North Yorkshire and East Riding (YNYER) LEP

- 2.54 The York, North Yorkshire and East Riding (YNYER) LEP brings together the business community and local authorities across the North Yorkshire County Council area (comprising the district/borough councils of Craven, Harrogate, Selby, Ryedale, Scarborough, Hambleton and Richmondshire) and the unitary authority areas of the City of York and the East Riding of Yorkshire.
- 2.55 Their Strategic Economic Plan (SEP) was submitted to the Government on 31<sup>st</sup> March 2014 and the stated vision is to make it the place in England to grow a small business, combining a quality business location with a great quality of life. The 5 key priorities stated within the SEP are to support
- Profitable and ambitious small and micro businesses.
  - A global leader in food manufacturing agri-tech and biorenewables.
  - Inspired people.

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- Successful and distinctive places.
  - A well connected economy.
- 2.56 The SEP states that businesses in the agricultural sector are around 3.5 times more concentrated in the LEP areas than the national average. It comments on Drax, the largest coal-fired power station in the UK, and Eggborough power station, which are both located within Selby District Council.
- 2.57 The LEP identifies four Core Activity areas with the one most appropriate to Selby being the A1/A19 Growth Corridor. Selby is identified as one of the growth towns. At the south of the Corridor, Drax, the UK's largest cleanest coal powered power station is investing over £1 billion in converting to biomass and developing the emerging technology around carbon capture and storage.
- 2.58 The SEP states that within this corridor there are major strategic sites, allocated within Local Plans and with approved planning, but where exceptional infrastructure costs are stopping or delaying development. Removing these barriers is essential to delivering their aim of providing employment land to support future growth.
- 2.59 In Selby, Olympia Park and the Proving Ground at Sherburn are identified as key sites to facilitate the growth of the district.
- 2.60 The SEP also comments on the proposed electrification of the Leeds-Selby-Hull train line which presents the opportunity for additional stations and service improvements.
- 2.61 The SEP Update 2016 has recently been published. This reinforces the 2014 SEP priorities and identifies the need to fast track employment sites with market demand for high value sector growth, and to drive inward investment on a site specific basis through relationships with the property industry and key intermediaries.
- 2.62 We have engaged with the YNYER LEP in 2015 and they stated that they see bio-economy, renewables and logistics as the main sectors within Selby. In terms of the region they see Selby as an area capable of accommodating growth due to connections to motorways and limited constraints to development like landscape designations that are an issue in the other areas of the LEP. In particular there is a need to seize an opportunity with Drax to assist the Selby economy.
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## York and North Yorkshire Economic Assessment 2010 (January 2011)

- 2.63 This document reviews the profile of Selby District Local Authority. The document identifies the same five Labour Market Areas as within the ELR Refresh; Selby Rural, Selby Town, Sherburn, South Selby and Tadcaster.
- 2.64 The key points for the District are that over the last ten years there has been an increase in jobs and enterprises, with relatively high levels of employment in manufacturing (including food and drink) and energy and water with less reliance on public sector employment (in relative terms).
- 2.65 The district has a very 'un self-contained' labour market. It was concluded that there are 7,000 more working residents than there are jobs within the District. Residents typically commute out to Leeds, York and Wakefield.
- 2.66 28% of the 32,000 jobs within the District are within the manufacturing and energy and water sectors, which is significantly higher than the national figure of 11%. There is therefore a high employment dependency on manufacturing and energy sectors and the main drivers in the future are expected to be in low carbon and energy businesses.
- 2.67 This document identifies five employment sub-areas ('Labour Market Areas') in the District (the same five Labour Market Areas as within the ELR Refresh) which are:
- Selby town – Principal Town for the District with a greater proportion of jobs within public administration;
  - Tadcaster – has a number of businesses and jobs within finance, however has experienced minimal employment development in the last five years;
  - Sherburn in Elmet – high proportion of employment growth within manufacturing and construction and has been the main location for employment development since 2004;
  - Selby Rural – has the highest proportion of small businesses of any labour market area within the York and North Yorkshire sub region;
  - South Selby – has the highest employment within manufacturing, energy and water, with almost half of all employment in these sectors.

Figure 2.1: Map showing Employment Sub-Areas

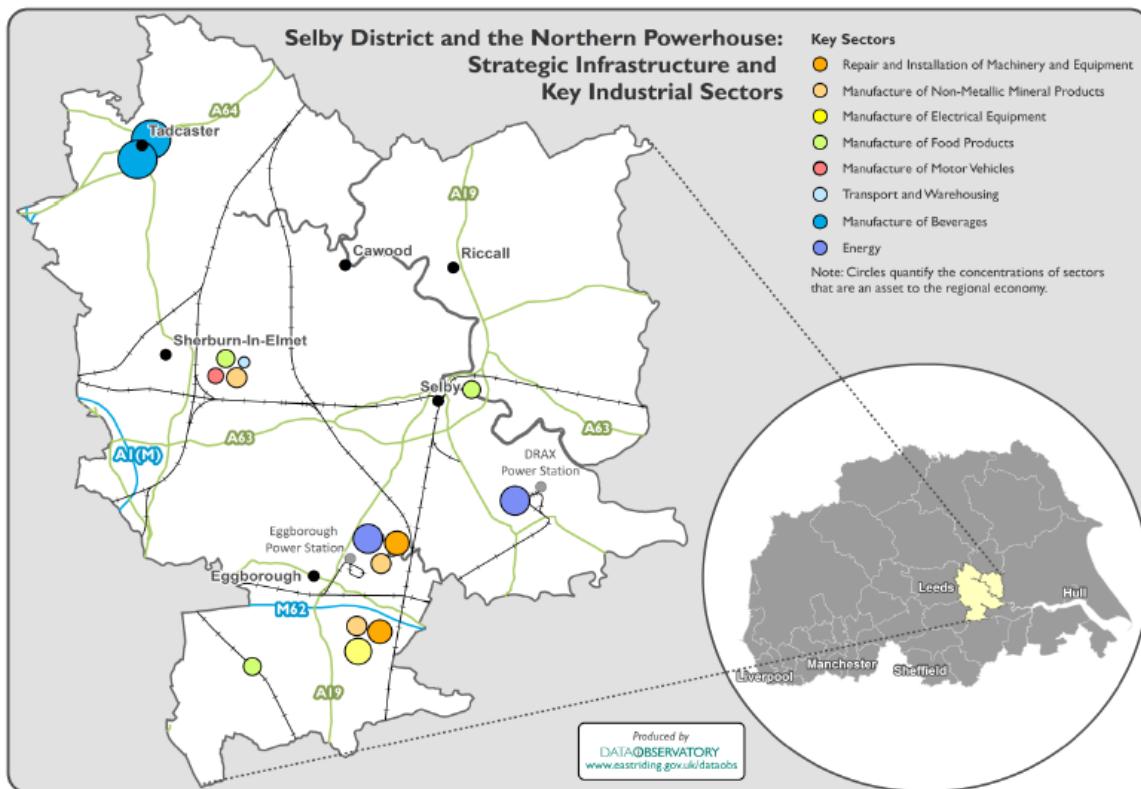


## Selby District Economic Development Strategy 2016 – 2020 and beyond Consultation Draft (August 2016)

- 2.68 In response to a lack of Economic Development function at the Council in recent years, this draft Strategy document is a key step in towards rejuvenating the Council's focus on economic development matters, critical to ensuring that the potential of the local economy is realised and maximised.
- 2.69 The vision of the Economic Development Strategy (EDS) is: 'To develop our economy and connect sustainable economic growth across Yorkshire, creating opportunities and improving prospects for all of Selby District's residents and businesses.
- 2.70 The EDS states that Selby District occupies an advantageous location at the heart of Yorkshire, offering its businesses a range of excellent road, rail, water, and energy infrastructure. There are clear and distinct strengths for its economy with regards to the energy, logistics, and manufacturing sectors, which have further potential for growth.

Figure 2.2 below, replicating Figure 1 in the EDS, illustrates the role of the Selby economy, and sets it within the Northern Powerhouse context.

Figure 2.2: Selby District and the Northern Powerhouse



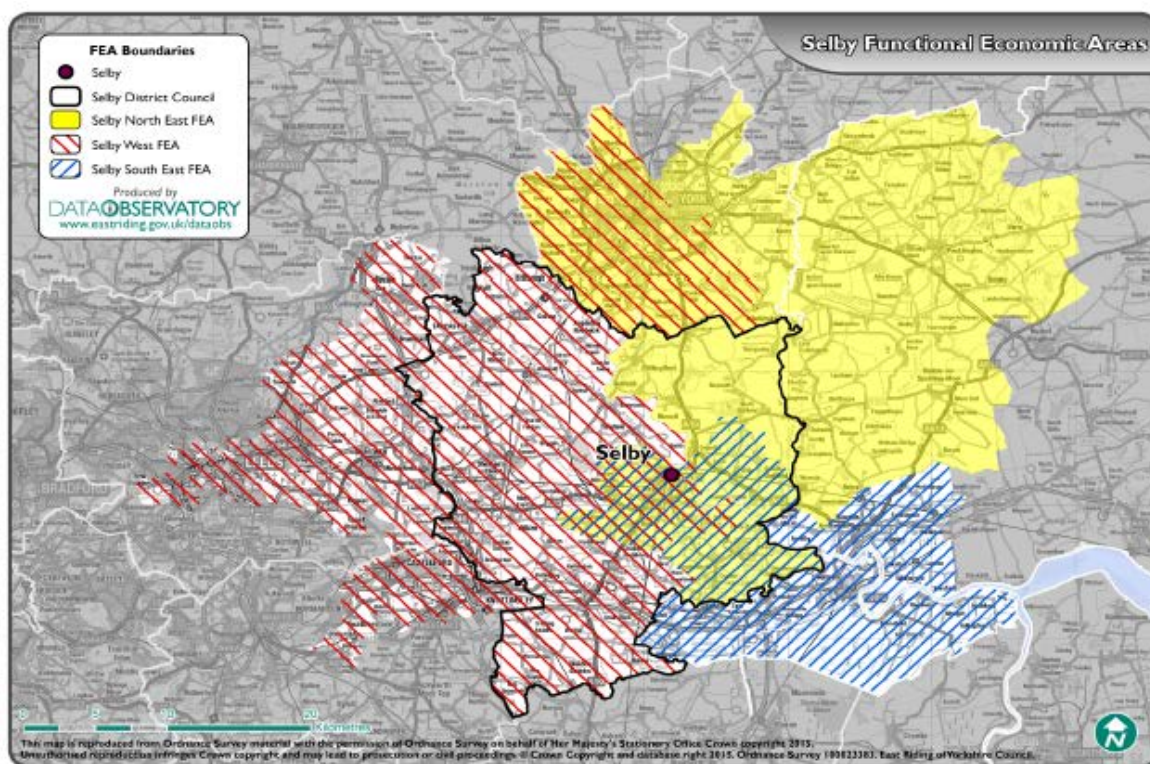
2.71 The EDS goes on to identify the Functional Economic Areas (FEAs) operating across Selby District, which overlap each other. The 3 FEAs identified are:

- ‘Selby North East FEA’ includes the city of York and the settlements of Selby and Pocklington;
- ‘Selby South East FEA’ comprises the settlements of Selby, Goole and Howden;
- ‘Selby West FEA’ includes part of eastern Leeds, southwest York and the settlements of Selby, Tadcaster, Sherburn-in-Elmet, Castleford and Knottingley.

2.72 The FEAs are shown in Figure 2.3 below (replicating Figure 3 of the EDS).



Figure 2.3: Selby District Functional Economic Areas



2.73 The supporting information that sits behind the Consultation Draft EDS (Annex D) profiles the FEAs as summarised below:

#### *Selby North East FEA*

- The FEA is located in the North East of the District covering the city of York, the principal towns of Selby and Pocklington, in addition to the smaller settlements of Barlby and Brayton within Selby District, and Stamford Bridge and Holme-on-Spalding Moor within the East Riding of Yorkshire.
- The FEA contains sections of some of the busiest roads in the Selby District, specifically the A19 (Doncaster to Newcastle), A63 (Hull to Leeds), and the A163 (Holme-on-Spalding Moor to Selby).
- When analysing the Selby North East FEA, it is important to recognise the impact that the urban areas of York have upon the final statistics. Over 70% of the FEA population (177,900 people) live within the York authority area boundary despite covering just

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12% (42.8 square miles) of the total area; consequently, this is a major driver of the economic linkages that exist within this FEA.

- The key characteristics found in the Selby North East FEA are:
  - Population of 250,000 with above average working age and student population;
  - York accounts for two-thirds of business stock with strong representation in the 'Professional, Scientific & Technical', 'Retail' and 'Accommodation & Food' sectors;
  - Sole proprietorships below District and regional average;
  - High levels of employment in professional occupations, particularly in the 'Health' and 'Education' sectors;
  - High skills levels as over 30% of 16-74 year olds have a degree qualification or higher.

#### *Selby South East FEA*

- The FEA is located in the South East of the District covering the principal towns of Selby and Goole, in addition to the smaller settlements of Barlby and Brayton within Selby District and Howden and Snaith within the East Riding of Yorkshire.
- The FEA contains sections of some of the busiest roads in Selby District, specifically the M62 (Hull to Liverpool), A63 (Hull to Leeds), and the A1041 (Snaith to Selby).
- The key characteristics found in the Selby South East FEA are:
  - Significant increase in working age population over the last decade, particularly with an increased number of non-British Europeans settling in Selby town and Goole;
  - Below average levels of self-employment;
  - Manufacturing is a key employment sector within the FEA;
  - Below average educational attainment but trade apprenticeships are above regional and national rates;



- Pockets of skills deprivation in Selby town and Goole;
- More affordable housing than neighbouring areas.

#### *Selby West FEA*

- The FEA is located in the West of the District covering selected parts of the cities of Leeds (central and eastern); Wakefield (northern); and York (central and western). Principal towns also covered in the FEA include Selby town; Tadcaster; Wetherby; Garforth; Castleford; and Knottingley, as well as many other smaller settlements including Sherburn.
- The FEA contains sections of some of the busiest roads in the Selby District, specifically the M62 (Hull to Liverpool); A63 (Hull to Leeds); A64 (Scarborough to Leeds); A1 (M) (Edinburgh to London); and the A19 (Doncaster to Newcastle).
- When analysing the Selby West FEA, it is important to recognise the impact that the urban areas of West Yorkshire and York have upon the final statistics. Over 85% of the FEA population (440,000 people) live within the Leeds, Wakefield and York authority areas despite covering just 50.1% (167.5 square miles) of the total area; consequently, this is a major driver of the economic linkages that exist within this FEA.
- In total, according to the 2011 Census, 21,700 Selby District residents worked in this FEA (including those that worked from home), which is 50.0% of the total Selby workforce; 8,800 of these people worked outside of the District itself but within the FEA.
- The key characteristics found in the Selby West FEA are:
  - Population of over 500,000 with above average working age and student population;
  - 50% of Selby District residents work within this FEA;
  - Good road and rail transport links;
  - Service-orientated business stock with strong representation in 'Professional, Scientific & Technical', 'Retail' and 'Business Administration & Support Services';

- Sole proprietorships and self-employment significantly below District, regional and national averages;
- High levels of employment in professional occupations, particularly in the ‘Health’, ‘Professional, Scientific & Technical’ and ‘Education’ sectors;
- Lower skills levels with significant skills deprivation in areas of East Leeds, Wakefield and Selby town.

2.74 The EDS also identifies the significant contribution of specialist sectors to the Selby economy. Five sectors, including utilities; food & drink manufacturing; land transport, storage & post; other manufacturing; and computer & electronic products, contribute 36.1% of the total output of the district, compared to 13.6% and 11.8% in the YNYER and Leeds City Region (LCR) LEP areas respectively.

2.75 The EDS then identifies Priority Growth Sectors, as summarised in Figure 2.4 below (replicating Figure 5 of the EDS). These are reflected in a series of ‘indicative growth zones’ in the EDS, as shown in Figure 2.5 below (replicating Figure 6 of the EDS).

Figure 2.4: Priority Growth Sectors

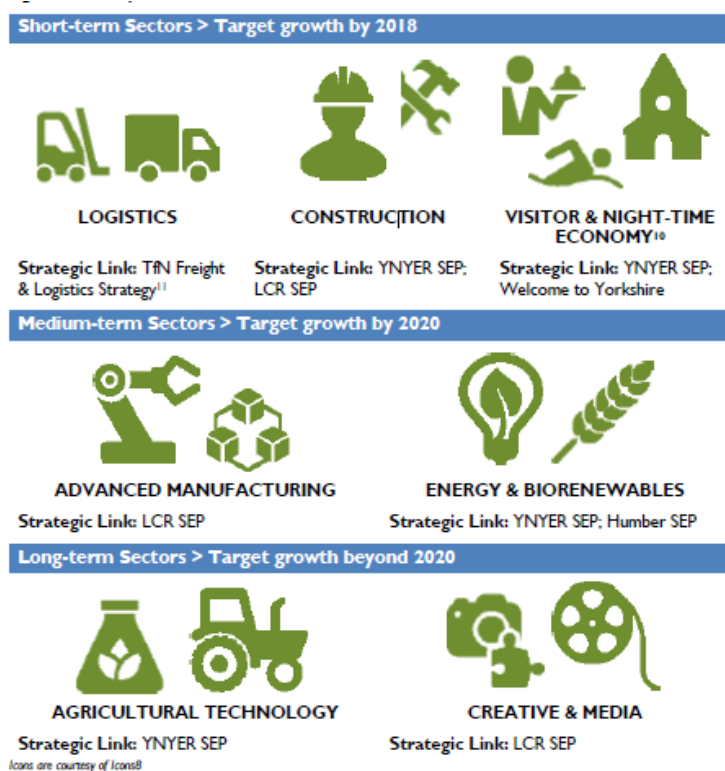
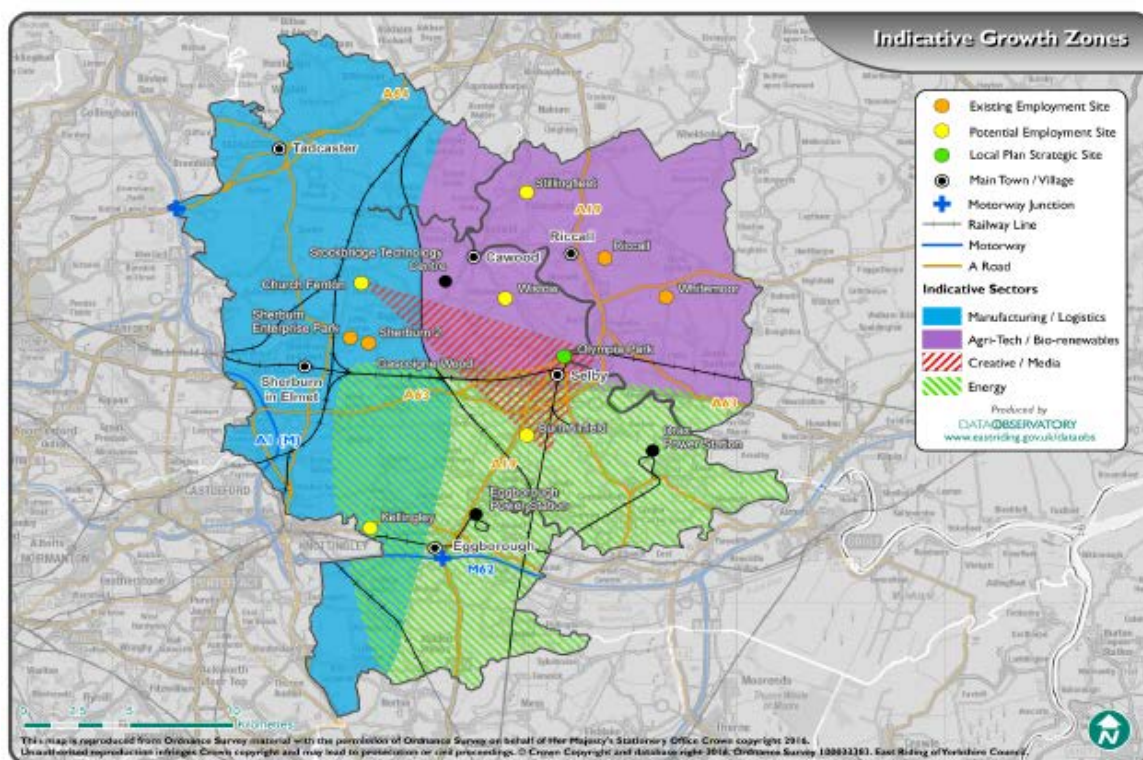


Figure 2.5: Indicative Growth Zones



2.76 Appendix 2 of the EDS summarises these Growth Zones as follows:

- The 'Manufacturing/ Logistics' indicative growth zone covers the western side of the District and includes the towns of Tadcaster and Sherburn-in-Elmet. These two sectors are already strongly represented at the employment sites within this zone including the breweries and Lambert Engineering in Tadcaster, as well as the major companies that have been attracted to Sherburn Enterprise Park and latterly Sherburn 2. The reclamation and redevelopment of the former Kellingley Colliery is also likely to be of significant interest to these sectors due to its potential multi-modal transport infrastructure and close proximity to the M62. The District has significant existing strengths in these sectors, and both are valuable in in terms of business rate contributions.
- The 'Energy' indicative growth zone covers the south-eastern side of the District and includes Drax and Eggborough Power Stations, as well as prospective employment land at Kellingley. This sector complements the LCR SEP priority of 'building a resource smart City Region' and the 'Low Carbon & Environmental' sector, as well as

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identifying the potential to link to key investments in the growing low-carbon and renewables sector in the Humber sub-region.

- The 'Creative/ Media' zone occupies a smaller central space within the District and there is potential for this to emerge as a high-value growth sector across the District/region. The indicative zone currently covers 'The Yorkshire Studios' at Church Fenton Airfield, along with prospective employment sites at Burn Airfield and Olympia Park.
- The 'Agri-Tech/ Bio-renewables' zone is situated on the north-eastern side of the District and is a priority sector for the YNYER LEP, who have identified the potential for an 'agri-tech/energy' corridor along the A19 between York and Selby town in their SEP document. The location and infrastructure available at these sites, which includes Olympia Park, has the potential to meet the needs of business start-ups that emerge from research being undertaken at FERA Science, the Stockbridge Technology Centre and BDC. However, resolving long-standing policy issues relating to planning permissions and the future use of these sites will be critical to take advantage of any potential development opportunities.
- Though by no means binding, these zones provide an indication as to which sites may be of interest to businesses in specific industries and, therefore, may provide assistance in ascertaining the necessary infrastructure required at each site as a result. For example, the more remote former mine sites located off the A19 are unlikely to be suited to the requirements of large manufacturing or logistics companies due to their inferior transport links, particularly when compared to employment land available at Sherburn 2 and prospectively, Kellingley. The infrastructure and 'screened' nature of these former mine sites, however, could be more appropriate for smaller businesses/business start-ups in the agri-tech and bio-renewables sectors.
- Construction tends to be less prescriptive in terms of specific locations and so is not included in a specific growth zone.

2.77 The EDS concludes by setting a strategic framework for 'Making Selby a great place...'

- For enterprise and business growth – by attracting investment, supporting business and targeting priority sector growth;

- To live and work – by developing vibrant communities with a quality housing, retail and leisure offer;
- To achieve our potential – by developing a skilled and responsive workforce.

2.78 Of particular relevance to this ELR, the EDS identifies the following actions to support the first objective:

- Carefully manage the current supply of available development land at key employment sites (Olympia Park, Sherburn 2 and Kellingley), to support indigenous business growth and inward investment in priority sectors;
- Seek to deliver a strategic portfolio of ‘development ready’ employment sites capable of supporting targeted growth in priority sectors.

2.79 In relation to sites, it should also be highlighted that Appendix 2 provides further detail. This is as shown in Figure 2.6 below, which replicates the table in Appendix 2 Figure F of the EDS.

Figure 2.6: Key Existing and Potential Employment Sites

	Site	
<b>Strategic Sites (Local Plan)</b>	Olympia Park	
<b>Existing Employment Sites</b>	Sherburn Enterprise Park; Riccall Mine;	Sherburn 2; Whitemoor Mine
<b>Potential Employment Sites</b>	Kellingley Church Fenton Airfield Gascoigne Wood Gascoigne Interchange	Burn Airfield Stillingfleet Mine Wistow Mine

2.80 The supporting text states:

*At present, there appear to be gaps in provision on the M62, particularly around Junction 34. Each site identified in figure F [...] benefits from significant strategic connectivity, with all sites situated within five miles by road of the A1(M), A19 or A63. Sites at Olympia Park, Burn Airfield and Kellingley Colliery benefit from having potential multi-modal transport infrastructure, whilst Burn Airfield and Gascoigne Wood Interchange have access to high quality rail connections. Consequently, each of these sites has the potential to play a*

*considerable part in the Northern Powerhouse agenda. The former mine sites also have significant on-site infrastructure that may be of potential interest to specific sectors.*

*Exploring the economic potential of Tadcaster is also a recommendation of this Strategy. The town is strategically located next to the A64 and within close proximity of the A1(M), equidistant between the major urban centres of Leeds and York. [...] However, any investigative work should take land already allocated at both Sherburn Enterprise Park and Sherburn 2 into careful consideration.*

## **Economic analysis**

- 2.81 This section summarises economic analysis undertaken for Selby district and has been carried forward from the 2015 Draft ELR. It establishes the recent economic trends in the district taking into account, wherever data allows, the impacts and legacy of the recessionary period which has affected the UK economic more generally in recent years. It then considers forecasts for the district in this context for the period to 2027, in line with the Local Plan period.
- 2.82 The context for the analysis and trends since 2005 is one of pre-recession boom but where the UK economy hit a wall in 2007/8 with serious consequences for key sectors such as financial services. The impact of the latest recession is akin to a structural break in the economy. As a result of this break, it is difficult to assume a continuation of past trends as a baseline for the future, although analysis of this data where appropriate does still provide important context. This is explored in more detail in the remainder of this section.

### **The Selby economy at a glance**

- 2.83 The table below presents the main economic indicators for Selby, drawing on the latest data available at the time of writing.

Figure 2.7: Selby economy at a glance

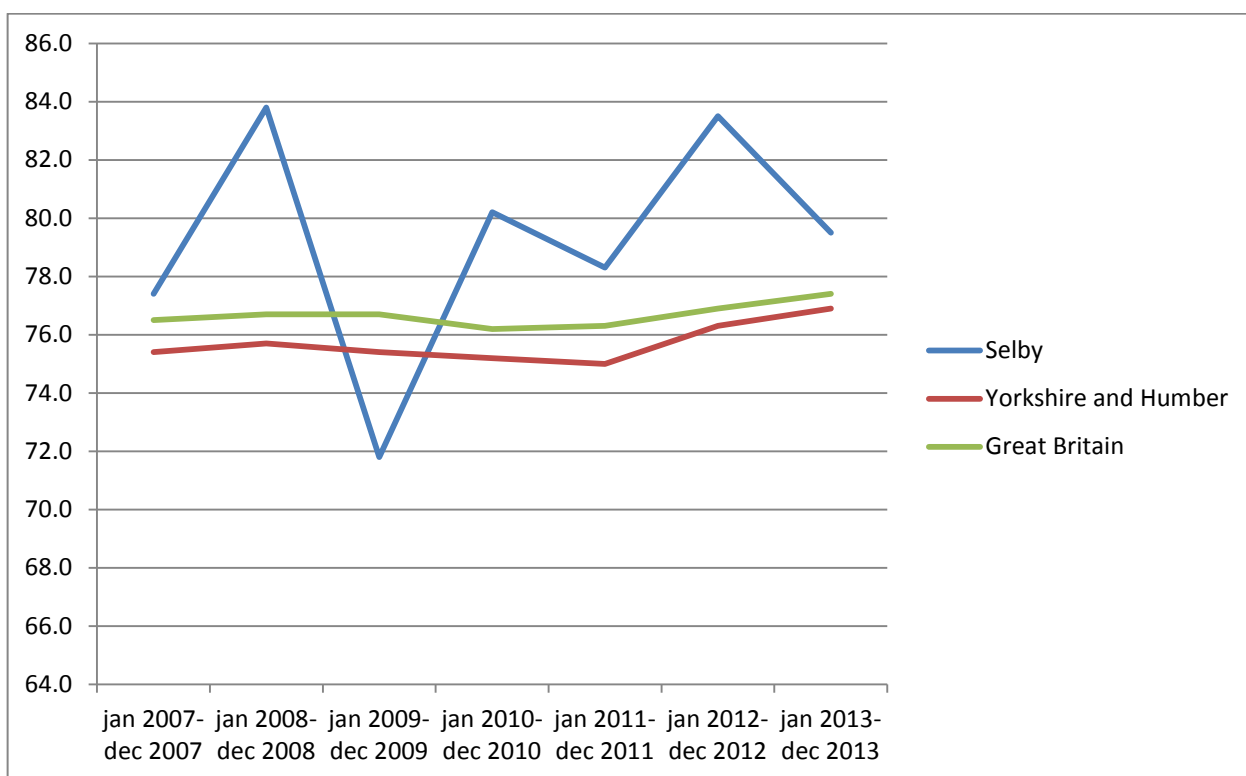
	Selby	Yorkshire and Humber	England and Wales
Working age population	61,831	3,875,219	41,126,540
Economically active	73.8%	68.3%	69.7%
Economically active self employed	10.3%	8.4%	9.7%
Economically active unemployed	3.5%	4.8%	4.4%
No qualifications	21.2%	25.8%	22.7%
Level 4 Qualifications and above	26.1%	23.3%	27.2%

Source: Census, 2011

### Labour force

- 2.84 Selby compares extremely well against all main and relevant labour force indicators for a small economy.
- 2.85 Considering first economic activity rates. Figure 2.8 shows that the rate for Selby is well above average.

Figure 2.8: Economic activity rate (%'s) (resident working age population, 16-64 years)

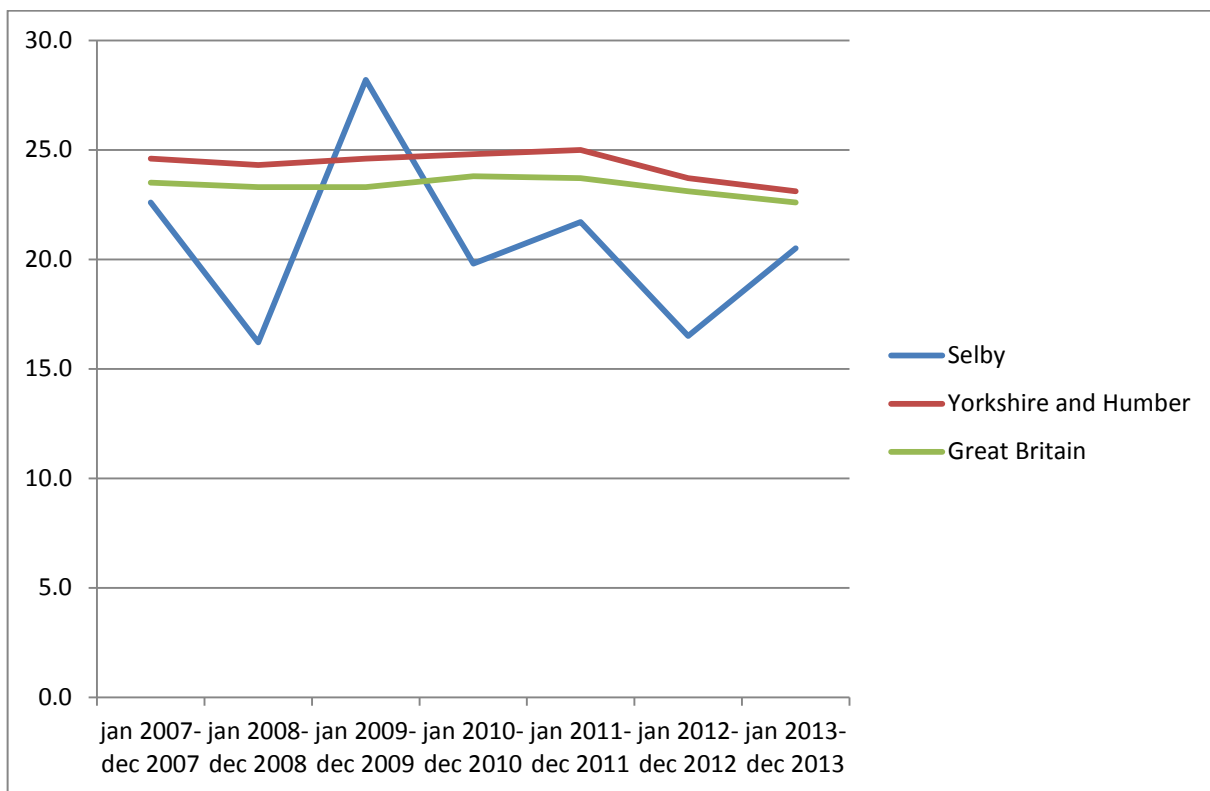


Source: Annual Population Survey, 2014

- 2.86 Although Selby has clearly experienced more erratic changes in economic activity rates over the period 2007 to 2013, these started and finished the period at a level significantly above the regional and national average – and indeed with a widened gap.
- 2.87 Of particular note here is the more extreme effects of the recession on economic activity rates in Selby than the wider geographies, but the then greater recovery observed.
- 2.88 Conversely, the economic inactivity rate for Selby has been generally downwards over the same period, but again with the same fluctuations mirroring those of economic activity levels, including a spike during / following the recession.



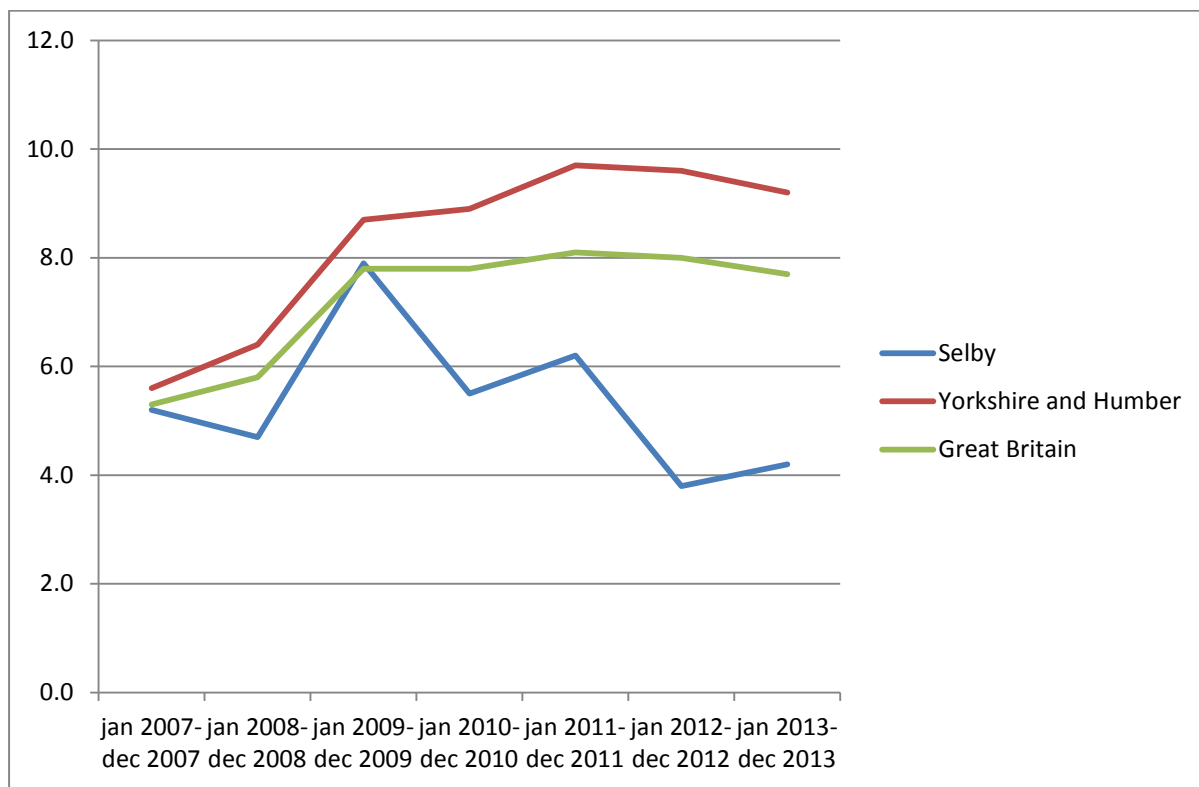
Figure 2.9: Economic inactivity rate (%'s) (resident working age population, 16-64 years)



Source: Annual Population Survey, 2014

2.89 Unemployment rates in Selby are relatively low and the trends since 2007 are consistent with the sense of resilience within the local economy. In particular whilst the wider comparators showed increasing unemployment rates over the period, Selby showed falling rates.

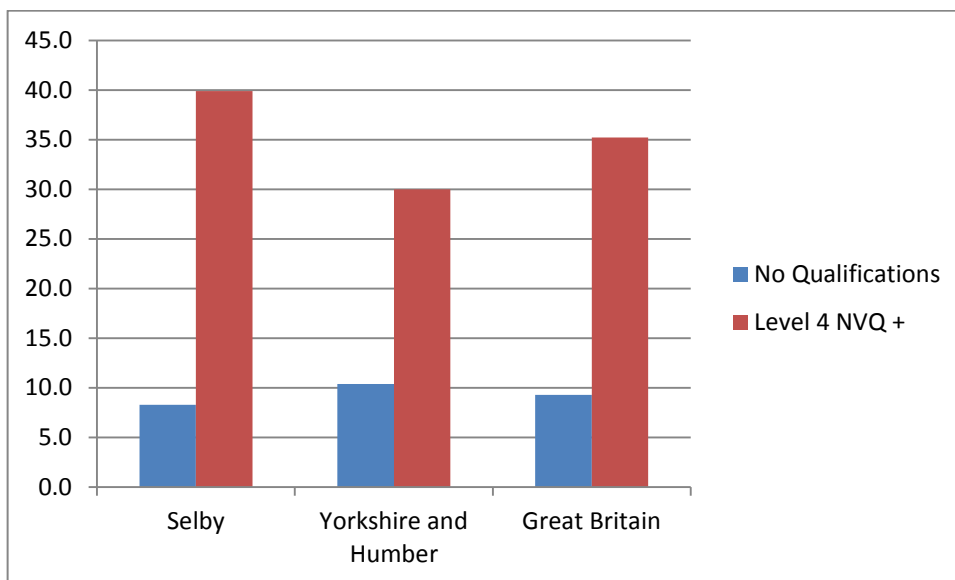
Figure 2.10: Unemployment rate (%'s) (resident working age population, 16-64 years)



Source: Annual Population Survey, 2014

- 2.90 A telling factor within this analysis is the level of skills evident within the resident workforce (population aged between 16 and 64 years).
- 2.91 Figure 2.11 shows that Selby has well above average levels of working age residents with higher level qualifications and much lower levels of those with no qualifications at all, compared to the regional averages.

Figure 2.11: Qualifications (%'s) (resident working age population, 16-64 years) (2013)

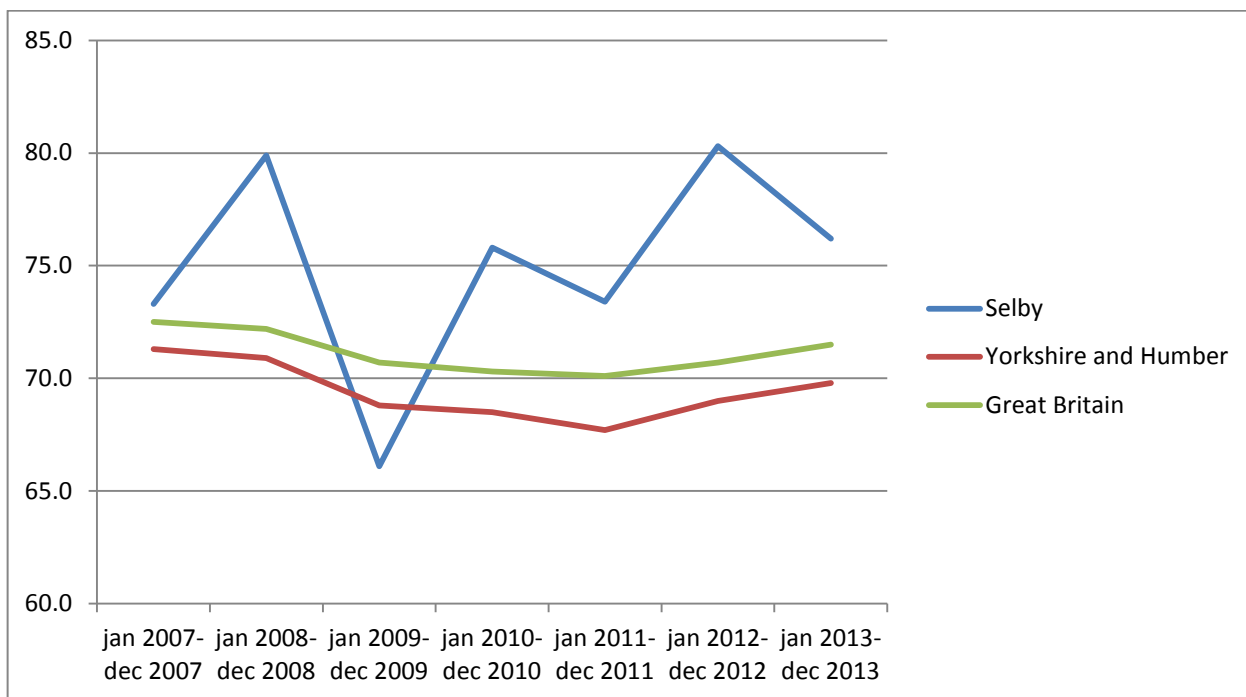


Source: Annual Population Survey, 2014

### Employment levels

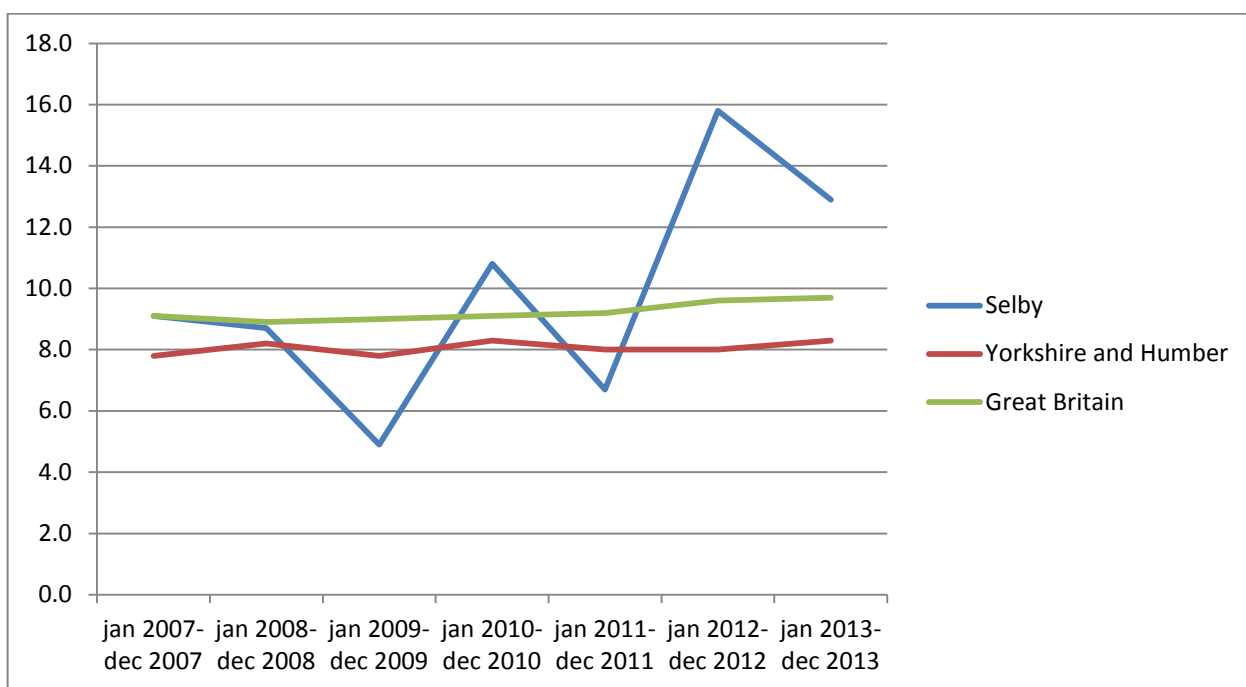
- 2.92 The labour force analysis would be expected to translate into strong employment performance within Selby. Total employees in employment during the period 2007 to 2013 increased by 0.4% - a relatively minor increase. Perhaps of more note over this period was the significant increase in self-employment by some 3.8% which largely underpinned the employment rate over the period.
- 2.93 With the exception of 2009, the local economy has seen employment rates above those of the region and national averages consistently over the period 2007 to 2013. The second chart shows the significance of self-employment over the same period. Between 2007 and 2013 self-employment added some 2,300 people into employment.

Figure 2.12: Employment rate (%'s) (resident working age population 16-64 years)



Source: Annual Population Survey, 2014

Figure 2.13: Self-employment rate (%'s) (resident working age population 16 – 64 years)



Source: Annual Population Survey, 2014

## Sector analysis (employment and GVA)

### Long term analysis

2.94 To inform the analysis of historic employment change in Selby we have obtained econometric forecasting data from Experian Business Strategies, broken down by sector as far back as 1997. It is noted that this analysis includes a period of recession within the UK economy, with consideration therefore given to long term trends (1997 – 2013) and shorter term trends (2008 – 2013).

2.95 The analysis focuses on Full Time Equivalent (FTE) data for Selby. Experian base FTEs on total hours worked and is as follows:

$$\text{FTE} = (\text{HOURS}) \text{ divided by } (37.8 \times 13)$$

2.96 Here a constant yard-stick of full-time employment for all industries, regions and industry-region based on thirteen working weeks in a quarter at 37.8 hours a week. 37.8 hours is the average hours worked by a full-time worker in the UK between 1990 and 2009.

- 2.97 The FTE measure as captures and accounts for the difference between full-time and part-time jobs, while employees/employment treats both equally. In that sense, FTE is a truer measure of total job creation in a local area.
- 2.98 Between 1997 and 2013, FTEs in Selby increased by 4,181 (net), a 16.2% increase compared to 5.1% across Yorkshire and Humber, and 9.1% across the UK. Gross Value Added (GVA) over the same period increased by 20.3% across Selby, compared to 28.8% across the region and 31.7% across the UK. This suggests that the value of employment growth across the region and the UK was above that experienced in Selby.
- 2.99 The following tables summarise the sectors that posted employment growth, and then GVA growth over the period 1997 – 2013 according to the Experian dataset.

*Figure 2.14: FTE Employment growth sectors 1997 – 2013 (Selby)*

Sector	Absolute Change	% Change
Utilities	43040	15.9%
Construction of Buildings	37720	10.8%
Specialised Construction Activities	43160	6.4%
Retail	140920	6.7%
Land Transport, Storage & Post	119960	10.5%
Accommodation & Food Services	199800	16.2%
Recreation	101630	23.4%
Media Activities	7710	3.3%
Computing & Information Services	280760	86.8%
Finance	149200	19.9%
Real Estate	241020	113.7%
Professional Services	761380	61.7%
Administrative & Supportive Services	432040	26.2%
Other Private Services	18380	3.8%
Public Administration & Defence	23950	1.8%
Education	562140	39.1%
Health	532100	40.5%
Residential Care & Social Work	511030	56.4%

Source: Experian Business Strategies, GVA Analysis, 2014

Figure 2.15: GVA growth sectors 1997 – 2013 (Selby)

Sector	Absolute change in GVA (£) (Mns)	% Change in GVA
Food, Drink & Tobacco (manufacture of) (£mn CVM 2010 prices)	67.15	71.7%
Textiles & Clothing (manufacture of) (£mn CVM 2010 prices)	0.96	290.9%
Wood & Paper (manufacture of) (£mn CVM 2010 prices)	0.61	4.2%
Printing and Recorded Media (manufacture of) (£mn CVM 2010 prices)	0.65	50.4%
Non-Metallic Products (manufacture of) (£mn CVM 2010 prices)	14.13	84.6%
Metal Products (manufacture of) (£mn CVM 2010 prices)	7.6	97.4%
Computer & Electronic Products (manufacture of) (£mn CVM 2010 prices)	20.4	201.6%
Machinery & Equipment (manufacture of) (£mn CVM 2010 prices)	3.65	42.1%
Transport Equipment (manufacture of) (£mn CVM 2010 prices)	3.91	362.0%
Other Manufacturing (£mn CVM 2010 prices)	26.55	158.4%
Utilities (£mn CVM 2010 prices)	37.43	18.9%
Civil Engineering (£mn CVM 2010 prices)	32.39	232.0%
Wholesale (£mn CVM 2010 prices)	6.12	7.8%
Retail (£mn CVM 2010 prices)	10.34	23.1%
Land Transport, Storage & Post (£mn CVM 2010 prices)	83.23	398.0%
Air & Water Transport (£mn CVM 2010 prices)	0.84	1680.0%
Recreation (£mn CVM 2010 prices)	1.97	23.4%
Media Activities (£mn CVM 2010 prices)	1.77	33.0%
Telecoms (£mn CVM 2010 prices)	4.21	738.6%
Computing & Information Services (£mn CVM 2010 prices)	13.83	540.2%
Finance (£mn CVM 2010 prices)	0.84	5.8%
Real Estate (£mn CVM 2010 prices)	17.35	43.8%
Professional Services (£mn CVM 2010 prices)	45.53	99.2%
Administrative & Supportive Services (£mn CVM 2010 prices)	40.93	127.5%
Public Administration & Defence (£mn CVM 2010 prices)	1.8	6.5%
Education (£mn CVM 2010 prices)	15.56	21.2%
Health (£mn CVM 2010 prices)	12.48	82.4%
Residential Care & Social Work (£mn CVM 2010 prices)	13.6	81.9%

Source: Experian Business Strategies, GVA Analysis, 2014

2.100 It is immediately apparent from the above analysis that the list of sectors posting GVA growth over the period 1997 to 2013 is longer than the list of sectors posting FTE employment growth. The sectors posting GVA growth but not FTE employment growth are therefore high value sectors – with contracting levels of activity but increasing value to

the economy. For Selby this includes sectors such as a number of manufacturing sub-sectors, civil engineering, and wholesale (including some distribution activities).

- 2.101 Other sectors have recorded both GVA growth and FTE employment growth over the period, including of specific relevance to this ELR (given their relationship to the B1, B2, B8 land uses): media activities, computing and information services, finance, real estate, professional services, administrative and support services.

*Short term analysis (consideration of the recession)*

- 2.102 The following tables summarise the same analysis for a shorter time period – 2008 – 2013. This shorter time frame allows more detailed consideration of the potential impacts of the recession in Selby – and in particular on the nature of economic change which has taken place during and since the recessionary period (i.e. post 2009).
- 2.103 Over the period 2008 – 2013, FTE employment in Selby increased by 2,068 or 7.4%, compared to 0.2% across Yorkshire and Humber and 1.9% across the UK. This shows significant strength in the local economy – but obviously does not take into consideration the quality of this FTE employment growth.
- 2.104 Over the same period, GVA within the Selby economy decreased by some £14.49mn, or -1%, compared to -3.2% across Yorkshire and Humber and -0.9% across the UK. It is clear on this basis that the local economy is outperforming the regional economy, in terms of FTE employment and GVA, but the contraction in value within the local economy is still a concern in the context of higher FTE employment growth over this period.



Figure 2.16: FTE Employment growth sectors 2008 – 2013 (Selby)

Sector	Absolute Change	% Change
Agriculture, Forestry & Fishing	290	126.1%
Food, Drink & Tobacco (manufacture of)	640	24.6%
Textiles & Clothing (manufacture of)	10	33.3%
Wood & Paper (manufacture of)	80	22.9%
Printing and Recorded Media (manufacture of)	10	25.0%
Fuel Refining	0	0.0%
Pharmaceuticals (manufacture of)	2	-
Non-Metallic Products (manufacture of)	40	5.6%
Metal Products (manufacture of)	0	0.0%
Computer & Electronic Products (manufacture of)	160	24.2%
Transport Equipment (manufacture of)	180	300.0%
Utilities	290	26.6%
Construction of Buildings	20	6.7%
Civil Engineering	80	12.1%
Land Transport, Storage & Post	1170	62.2%
Air & Water Transport	5	100.0%
Media Activities	0	0.0%
Telecoms	0	0.0%
Computing & Information Services	100	71.4%
Finance	20	11.1%
Insurance & Pensions	1	-
Professional Services	20	1.0%
Other Private Services	10	2.9%
Education	140	6.4%
Residential Care & Social Work	430	35.8%

Source: Experian Business Strategies, GVA Analysis, 2014

- 2.105 The first point to note is the length of this list of growth sectors compared to that over the longer term period – suggesting that the Selby economy has successfully (in FTE employment terms) diversified following the recession. Interestingly this includes FTE employment growth in some manufacturing sub-sectors, which actually showed a decline over the longer term.
- 2.106 As before, a similar analysis has been undertaken of GVA change over the period 2008 – 2013, summarised in the table below.

2.107 Comparing this table to the earlier longer term GVA analysis suggests a greater concentration of value contributors to the Selby economy. It is also important to note that in the shorter term analysis it is clear that the list of FTE employment growth sectors is longer than GVA growth sectors. Interestingly a number of manufacturing sub-sectors are noted as contributing to GVA growth – suggesting a degree of quality in these activities within Selby in the post-recession period. The same is true of computing, finance and professional services locally.

Figure 2.17: GVA growth sectors 2008 – 2013 (Selby)

Sector	Absolute change in GVA (£) (Mns)	% Change in GVA
Agriculture, Forestry & Fishing (£mn CVM 2010 prices)	4.18	21.2%
Food, Drink & Tobacco (manufacture of) (£mn CVM 2010 prices)	26.57	19.8%
Textiles & Clothing (manufacture of) (£mn CVM 2010 prices)	0.11	9.3%
Fuel Refining (£mn CVM 2010 prices)	0.04	133.3%
Transport Equipment (manufacture of) (£mn CVM 2010 prices)	3.15	171.2%
Other Manufacturing (£mn CVM 2010 prices)	10.73	32.9%
Civil Engineering (£mn CVM 2010 prices)	11.35	32.4%
Land Transport, Storage & Post (£mn CVM 2010 prices)	23.05	28.4%
Air & Water Transport (£mn CVM 2010 prices)	0.39	78.0%
Recreation (£mn CVM 2010 prices)	0.17	1.7%
Telecoms (£mn CVM 2010 prices)	0.07	1.5%
Computing & Information Services (£mn CVM 2010 prices)	1.66	11.3%
Real Estate (£mn CVM 2010 prices)	9.56	20.2%
Administrative & Supportive Services (£mn CVM 2010 prices)	7.95	12.2%
Education (£mn CVM 2010 prices)	1.55	1.8%
Health (£mn CVM 2010 prices)	4.37	18.8%
Residential Care & Social Work (£mn CVM 2010 prices)	6.12	25.4%

Source: Experian Business Strategies, GVA Analysis, 2014

#### *Sector concentrations*

2.108 Taking the above analysis a stage further, we have considered the extent to which any sectors are found to have a stronger concentration in Selby compared to the regional economy. Location Quotient (LQ) analysis establishes the concentration of employment within a sector locally compared to the wider regional base. An LQ score above 1

suggests a larger local concentration and therefore assumed competitiveness at sector level.

2.109 Figure 2.18 shows the LQ analysis for FTE employment in Selby by sector compared to a Yorkshire and Humber base, in 2014 (using the Experian data). The sectors included in the table are those that are identified as sector concentrations (i.e. having a score of >1 compared to the region).

*Figure 2.18: Selby LQ analysis (compared to region) (FTE employment) >1 LQ sectors*

	YH (% total employment)	Selby (% total employment)	LQ
Agriculture, Forestry & Fishing	1.21	2.22	1.84
Extraction & Mining	0.22	2.45	11.00
Food, Drink & Tobacco (manufacture of)	2.42	10.73	4.44
Wood & Paper (manufacture of)	0.78	1.44	1.84
Non-Metallic Products (manufacture of)	1.28	2.49	1.94
Computer & Electronic Products (manufacture of)	0.77	2.39	3.10
Other Manufacturing	1.46	2.62	1.79
Utilities	1.27	4.55	3.57
Civil Engineering	0.98	2.58	2.65
Specialised Construction Activities	2.93	3.73	1.27
Land Transport, Storage & Post	6.00	10.47	1.75
Accommodation & Food Services	4.48	4.52	1.01
Professional Services	6.22	6.61	1.06

Source: Experian Business Strategies, GVA Analysis, 2014

2.110 Reading this alongside the GVA analysis suggests that the concentration of a number of these sectors could be significant in terms of the value contribution that they make. In particular it is noted that historical growth in GVA was recorded (in most cases across both the long term and the shorter post-recession period) for the following sectors of relevance to this ELR (i.e. with a B1, B2, B8 significance):

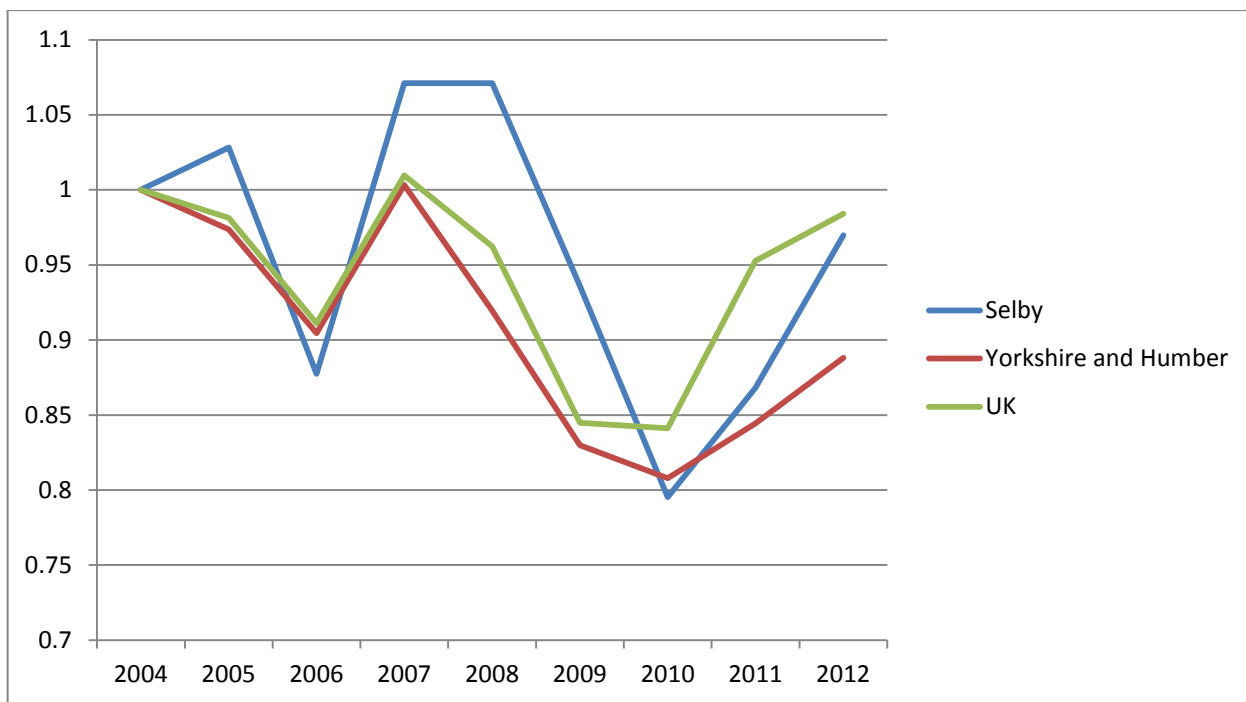
- Food, drink and tobacco manufacturing
- Wood and paper manufacturing
- Non-metallic products manufacturing

- Computer and electronic products manufacturing
- Other manufacturing
- Civil engineering
- Professional services
- Land transport, storage and post

Business survival rates

2.111 In addition to the analysis above concerning the different sectors within the Selby economy, data has been examined regarding the change in business start-ups and failure rates in the area, compared with the wider geography.

Figure 2.19: Business start-up rates 2004 – 2012 (Indexed 2004 = 1)



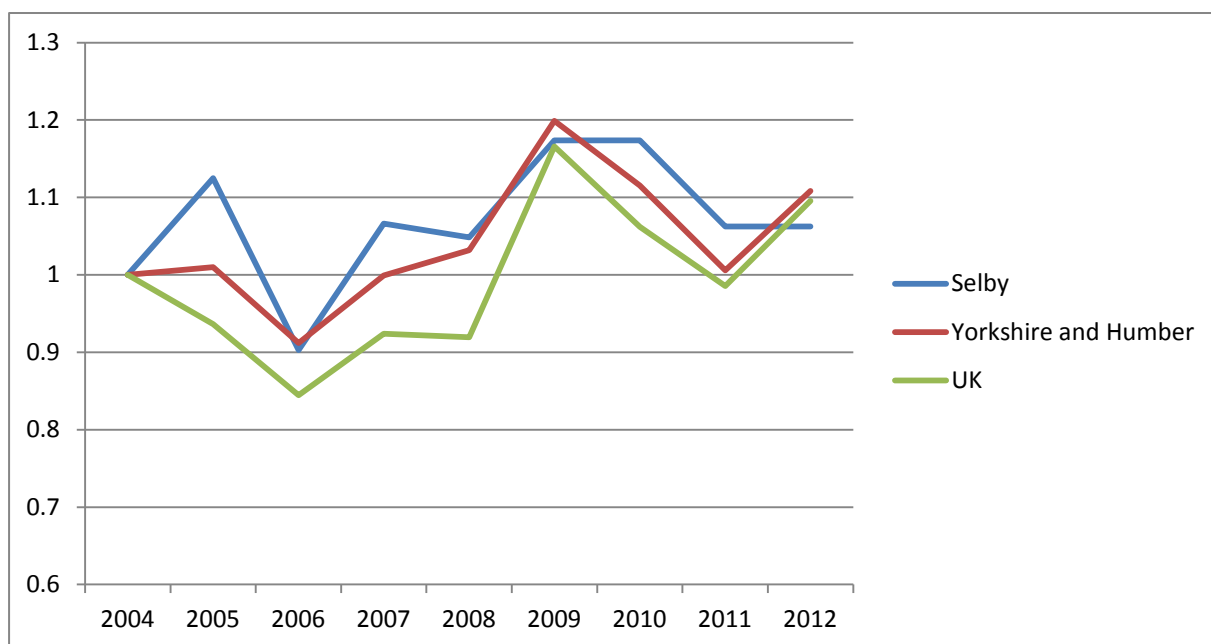
Source: ONS, 2014

2.112 Business start-up activity in Selby appears to generally follow that of the region and the UK, but at a more pronounced level – initial increases in 2004/5 were followed by a sharp decline in 2006, with the same pattern emerging for the period 2007 – 2010 but more acutely. Indeed, the impact of the recession in Selby could well be illustrated by the

sharp decline in business start-ups in 2008 – 2010. Following 2010 start-ups did increase in Selby at a more pronounced rate than across the region – showing significant catch up with the UK.

2.113 The following figure shows business failure rates over the same period, and the same geography.

Figure 2.20: Business failure rates 2004 – 2012 (Indexed 2004 = 1)



Source: ONS, 2014

2.114 Business failure rates in Selby have similarly followed those of the region and UK, although generally have been at a higher level than the wider comparators. Encouragingly though in 2012 Selby had stabilised against this measure whilst both the region and UK were seeing increasing failure rates.

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## Commercial market analysis

### Introduction

- 2.115 As part of the baseline work undertaken to inform the study GVA has prepared this up to date property market review, focusing on the main commercial sectors within use classes B1, B2 and B8 with particular emphasis on Selby, Tadcaster, Escrick and Sherburn-in-Elmet. The section acts as a point-in-time review of the market.
- 2.116 This section is based on information that was available as at April 2016 and is structured as follows:
- An economic context;
  - A national commercial property market update; and
  - A local property market assessment of the main commercial sectors.

### Economic context

- 2.117 On 25 February 2016 the Office for National Statistics (ONS) released its preliminary estimate of UK Gross Domestic Product (GDP) for Q4 2015. GDP is one of the main indicators of economic growth: it demonstrates the activity of the Country in respect of all of the services and goods produced. GDP increased by 0.5% in Q4 2015 compared with 0.4% in Q3 2015.
- 2.118 The most recent employment statistics continue their general direction of travel, with rising employment and reducing unemployment being the trend. In the period November 2015 to January 2016, the employment rate for those aged 16-64 was 74.1% (up from 74% in the period September to November 2015 and up from 73.3% a year earlier). The unemployment rate in the period November 2015 to January 2016 was 5.1% of the economically active population, the lowest recorded since late 2005.
- 2.119 Figures for income growth are improving, albeit at a modest pace. In January 2016, pay including bonuses for employees in Great Britain was 2.4% higher than a year earlier and pay excluding bonuses was 2.2% higher than a year earlier.

- 2.120 Consumer Prices Index (CPI) grew by 0.3% in the year to February 2016, representing no change from January but a 0.3% increase from a year earlier (February 2015). The largest contributors to the increase in inflation came from prices for food and non-alcoholic beverages. A large proportion of inflation was due to a noticeable increase in pricing of household groceries such as vegetables and dairy products. The current rate of inflation remains well below the Government's inflation target of 2%.
- 2.121 In its attempts to stimulate the economy, the Monetary Policy Committee of the Bank of England has maintained a Bank Rate of 0.5% since March 2009. In order to give further monetary stimulus to the UK economy, the Bank initiated a programme of asset purchases – or quantitative easing – to inject money directly into the economy although this stimulus programme has been held steady for some time. As inflation has fallen, forecasters have been pushing back the likely timing of the first base rate rise, which is now not likely until late 2016 at the earliest.
- 2.122 In recent years the Government has introduced various measures to free up bank lending to small and medium sized firms and also to homeowners, to try to address soft economic conditions. The lack of bank lending was seen as a key stumbling block to stronger economic output growth.
- 2.123 The Office for Budget Responsibility's (OBR) latest economic and fiscal outlook report (dated July 2015) reflects the slight reservations caused by the 2015 Budget announcements. The OBR revised its forecast for GDP growth down to 2.4% in 2015 reflecting the weaker-than-expected start of the year and a small drag from the in-year public spending cuts announced in June 2015. The OBR predicts no change in growth from March 2016 as a result of the effect of back-loaded in-year cuts further off-setting slower cuts in 2016-17.
- 2.124 The International Monetary Fund (IMF) published its World Economic Outlook Update in January 2016. It suggests a stable level of growth for the UK across both 2016 and 2017 at 2.2%. This compares somewhat more favourably to the predictions for the Euro area as a whole which is expected to see growth of 1.7% for both 2016 and 2017.

## Commercial property – national perspective

2.125 GVA's Economic and Property Market Review for January 2016 provides an informative insight into the performance of the commercial property market from a national perspective.

### *The occupier market*

2.126 Employment growth is predicted to slow due to rising wages and higher capital investment. In order for productivity levels to improve upon recent poor performance, a slow-down in employment growth is arguably necessary as the tightening labour market will help to increase wages.

2.127 Recent take-up figures for the office sector reflect this optimism and the strong growth in business services and finance output. In the regional office markets in Q4, there was particularly strong activity across many key cities, many outperforming the five-year average.

2.128 Development activity is increasing, but is still at a historically very low level. Pressures caused by a lack of quality accommodation as well as increasing occupier demand are predicted to drive rental growth outside of central London.

2.129 Continuing strong increases in commercial and industrial development are likely for many years to come, based on past evidence and where we are now in the development cycle.

2.130 Across the property sectors, Investment Property Databank (IPD) data shows average rental values are approximately 8.1% higher than they were at the bottom of the market in 2013. Demand for distribution properties is high, with non-food discount retailers being the most active in 2015. Average rental growth of industrial properties in the year to November 2015 was 4.9% and GVA predicts a further 4% in 2016.

### *The investment market*

2.131 Demand for UK commercial property remains extremely strong, and the value of transactions has been steadily rising over the last two years, reaching circa £64 billion in the year to Q4 2015. Indeed, the market is climbing back to levels of activity seen during the height of the mid-2000s investment boom.

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- 2.132 All property equivalent yields have continued to fall with IPD data recording downward movement during 2015 where returns peaked at 20% and have now decreased to 14.3%.
- 2.133 GVA expects a lower, but still strong, total return than all property total return for 2015 (at 14%), anticipating approximately 9% in 2016. Rental growth is expected to be the main driver for strong performance as opposed to yield movement, however with the vast amounts of money looking to invest some further yield compression is likely. This compression is most likely to be noticeable in the regional markets and across better quality secondary property.
- 2.134 Yield movement has been particularly strong in the regional business space markets, and for good quality secondary property. As a result, the yield gap between London and the regions, and that between prime and secondary, has been narrowing this year. However, the yield gap remains historically wide.

#### *General demand factors*

- 2.135 Demand for employment sites is primarily a function of the occupational market. Given banks' limited appetite for development lending in recent years, the supply of new accommodation has been relatively limited in secondary and tertiary markets and few employment sites have been brought forward. However, as underlying economic conditions continue to improve and the property market strengthens it is likely that a greater amount of development, investment and occupation interest will be shown in respect of the main commercial sectors.

#### *Speculative development*

- 2.136 For a number of years the prospect of speculative development was limited due to weak occupier demand (and therefore high vacancy rates) and very strict lending requirements (for example minimum levels of pre-lets), exacerbated by legislation such as Empty Property Rates.
- 2.137 The prospects for speculative development are substantially improved, particularly in key regional markets such as Leeds although significant levels of debt funding are likely to be limited to schemes in good locations which have an element of pre-let or pre-sales in place.

### *Profitability*

- 2.138 A developer must be able to obtain a market-risk adjusted return for their efforts. If the developer's return falls below what would be deemed acceptable by the market, the development would be deemed unviable and may not proceed. A developer is unlikely to be prepared to undertake a development without first establishing that an appropriate developer's profit can be generated.
- 2.139 Development schemes, especially those that are speculative, often require a profit on cost of between 20% and 25%. Where debt finance is available, the lender may specify a target profit rate. For schemes which are deemed less risky, the required profit may reduce to sub-20%, but only where the developer perceives the risk to have been tangibly reduced.

### *Supply of quality employment sites*

- 2.140 Following the deterioration in economic and property market conditions, a more risk-averse attitude emerged in the industry and although economic and property market conditions have improved substantially, a risk averse approach remains largely intact.
- 2.141 During the downturn, development activity reduced significantly and a number of sites were mothballed or proposals to bring development forward stalled. In some instances, especially in the case of large sites, Masterplans were re-thought and the type and mix adjusted to reflect market conditions. Development activity has increased substantially but developers, occupiers and investors have become more selective with the opportunities they pursue and remain location sensitive. There continues to be a strong preference for quality sites in good locations benefiting from good connectivity, particularly to the strategic road network.

### *RICS Commercial Market Survey*

- 2.142 The latest RICS UK Commercial Market Survey (Q4 2015) demonstrates that the market's performance continues to strengthen, both on the occupier and investment side. Momentum has also been recognised in the regions.
- 2.143 On the occupier side, tenant demand remains firm, at the all-property level and across each sector, with the industrial sector exhibiting the strongest momentum. Office and

industrial availability appears to be continuing to contract and rental expectations have improved.

2.144 In the investment market, buyer enquiries have continued to grow across the sectors although the pace of growth slowed to the lowest since Q3 2013. Overseas demand also slowed with only a marginal rise at the end of 2015. Furthermore, the supply of investment properties has continued to diminish.

2.145 Expectations are for capital values to rise over the course of the next 12 months. Prime office and industrial property values are expected to witness the greatest increase. In the regions, growth in capital values is expected to remain positive across all parts of the UK whereas survey respondents in London were somewhat more reserved about their expectations for capital value growth.

#### *Office sector*

2.146 GVA's latest "Big Nine" review (Q4 2015) of the regional office market points towards further occupier confidence, with record levels of take-up demonstrated in 2015. In total, 9.6 million sq.ft of office space transacted in the big nine city centres and out-of-town markets, representing an increase of 20% on the five year average.

2.147 The largest recorded deal in Leeds (the most significant commercial centre in close proximity to Selby) in recent months was the letting of approximately 100,000 sq.ft of office space at the edge-of-centre Leeds Dock development now owned by Allied London. Almost a third of the 450,000 sq.ft of office space due to complete in Leeds in 2016 was pre-let.

2.148 The continuing strong employment growth and strong service sector output growth, particularly for business services and finance, indicates healthy and improving occupier demand in the office market. However, this is yet to translate into significant average rental growth for the office sector in regional locations.

#### *Industrial sector*

2.149 GVA's Industrial Intelligence<sup>1</sup> research paper, published Autumn 2015, suggests demand for large logistics warehouses remains positive and during the first half of 2015 take-up of

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<sup>1</sup> <https://www.gva.co.uk/research/industrial-intelligence-autumn-2015>

- warehouses over 9,290 sq.m (100,000 sq.ft) exceeded the five-year average by 14% (achieving 11.6m sq.ft).
- 2.150 Online retail continues to drive change in the industry. Expectations are changing from next-day delivery to same-day delivery, increasing the need for retailers to have a larger number of smaller hubs around the country.
- 2.151 With existing availability of new space at a low level, design and build continues to be the predominant form of new supply, with development sites such as Barking Power Station in Dagenham receiving approximately 20 bids for the 40 acre site with several bids in excess of £50m. Retailers such as Amazon are beginning to build their own industrial units in strategic locations, demonstrating a heightened level of confidence in the online retailer market.
- 2.152 Overall investor demand for UK distribution property remains strong, however as the Industrial Intelligence paper sets out it is comparatively lower than 2014. UK distribution property investment transactions in the first half of the year totalled £1.7 billion, down from £1.9 billion seen in the latter half of 2014 however an improvement on the five-year average of £1.3 billion.
- 2.153 The UK distribution property market continues to see downward pressure on yields, fuelled by the demand from both domestic and overseas buyers. Yield dropped by 36 basis points in the first eight months of 2015, compared with 24 basis points over the same period in 2014.
- 2.154 With the weight of investment and lack of quality product in the market, investors are looking further up the risk curve at property with shorter income streams, where they can drive returns, encouraged by stronger occupational performance.
- 2.155 Improving occupier demand and a growing shortage of quality space are having an impact on rental growth. The annual rate rental growth for distribution property to August 2015 was 4.2% compared with 2.2% over the previous 12 months. GVA forecasts an average of 3.3% pa over the subsequent four years to 2019.
- 2.156 Industrial capital value growth was at 13% by autumn 2015, down from 17.1% on the previous year. Whilst this is decelerating growth, total returns were still strong at 20.1% pa, down from 21.7% three months prior.
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## Commercial property – local perspective

### *Agent consultation*

2.157 A range of property agents were consulted to provide a qualitative overview of the commercial property market in Selby District, with a particular focus on the industrial sector due to the nature of the local market. The following property agents and developers were consulted:

- GVA;
- CBRE;
- Dove Haigh Philips;
- Colliers International; and
- S Harrison.

2.158 Our findings are set out below.

### *Market sentiment*

2.159 The consensus amongst agents is that the local property market is showing good levels of demand, mostly in the industrial market sector. With improving economic conditions, the agents are finding that the pressure on supply caused by the lack of good quality product is one of the main drivers behind the heightened level of demand. Currently there are requirements for prominent industrial space with good visibility from the highway network. There is a severe shortage of this type of accommodation at this time.

### *Typical market requirements*

2.160 In terms of specific property requirements, the agents felt that at a local level, demand is for units of up to 20,000 sq.ft in some of the more remote locations where rental values may be more affordable. More nationally focused occupiers are more likely to require larger units, in more prominent locations along major transport nodes where rental values are likely to be somewhat higher. One agent explained that of late they have seen requirements from nationally significant occupiers for large scale properties in and around Selby District, along the M62 and M18 corridors. Equally the local indigenous demand is

still strong but more prevalent in the secondary locations. The agents were less positive about the office market, however the majority of agents involved in the surveys specialised in industrial property.

#### *Key existing locations*

- 2.161 From the information gathered, the main employment areas appear to be Sherburn and Selby Town with areas such as Tadcaster and Escrick seeing more minor levels of interest from potential occupiers. Some agents suggested that whilst Sherburn is the most desirable location for the majority of occupiers, a major priority for industrial occupiers is connection to major transport nodes such as the A1(M), A19 and ability to access the M62.
- 2.162 Employment demand for B8 use is seen in relatively significant quantities between junctions 32 and 27 of the M62, however a scarcity of supply in this specific location is forcing occupiers to broaden their searches. On the other hand, B2 demand is driven largely by enhanced capital allowances in Enterprise Zones as well as the availability of labour and power (as available on the former mine sites, notably at Kellingley). One agent mentioned that Selby town is really the only location which attracts office occupiers; however the quality of available accommodation is poor. (We understand that it is Selby Council's intention to undertake a full audit of office space within the district in due course).
- 2.163 The agents felt that the rural hinterland surrounding the main employment areas is important to the success of Sherburn and the Selby Town with the labour pool living in these rural areas. However, they felt that these rural areas are not benefitting commercially as a result of Sherburn's success in particular. One agent specified that DEFRA have stated that rural areas have to contribute to local and national wealth but that policies need to change to encourage employment in these rural areas. There was some agreement amongst the agents that in the "tucked away", rural areas there are opportunities for less aesthetically pleasing industrial uses such as waste and recycling premises.

#### *Key emerging sites*

- 2.164 The agents agreed that two of the key emerging sites in the Selby District are Gascoigne Wood and Sherburn Proving Ground.
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2.165 Another key emerging location is Kellingley Colliery which is expected to be able to attract new industry or cater for local expansion. Many of the key locations in Selby benefit from the lack of available land along the major transport corridors.

#### *Viability in the local market*

2.166 Development of new industrial units is vital to the growth of the Selby employment market according to the agents; however they stressed caution over speculative development due to the average lengths of void periods in Selby. One agent suggested that speculative development could be encouraged if the Council was willing to help de-risk sites to increase viability. The agents also felt that big industrial units are more likely to succeed in Sherburn, due to the trend of more national occupiers looking for accommodation there.

2.167 However, the current stock is becoming exhausted according to one agent, who believes an element of speculative development may be needed to drive new prime rental values which will in turn promote development, occupier migration to newer better quality properties and therefore release secondary units for indigenous expansion.

2.168 Another point made by the same agent was that as a result of the recession, there are fewer smaller property consultancies in the area. This in turn has, in the agent's opinion, reduced the local specialism and expertise which is vital for developers to find viability in building industrial properties in areas such as Selby.

#### *Selby's USP*

2.169 The main USPs that Selby can offer appear to be access to major transport nodes, competitively priced development land and availability of a good, skilled labour pool. Additionally, the agents felt that average wages in Selby being somewhat lower is an attractive proposition for many business occupiers. One agent specified that for many occupiers such as online retailers, high unemployment levels are often attractive as they look to take on much greater numbers of employees on a seasonal basis (i.e. to manage demand levels over the Christmas period) (albeit our earlier economic analysis does not support the assertion that the unemployment rate in Selby is comparatively high).

2.170 The availability of power is another key USP for Selby as many manufacturers or highly technical equipment need access to large amounts of energy as part of production. Sites

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such as Kellingley are therefore seen as excellent opportunities for these sorts of occupiers.

*Key sectors and geographic considerations*

- 2.171 According to the agents, the main employment sectors which are driving demand in Selby are manufacturing and logistics in larger units, with trade retail occupiers such as Travis Perkins in smaller units and less prominent areas. Additionally, discount/online retailers are becoming prominent in large scale warehouse type properties; and increasing diesel prices are bringing manufacturers back to the UK from Eastern Europe as transport costs rise.
- 2.172 The energy sector (and associated B1/B2/B8 occupiers) is seen as a risky sector due to its largely 'untested nature' – unless the energy occupier is a blue-chip covenant, manufacturing energy technology which is widely regarded as successful, landlords and developers are unlikely to see this as a viable market. It was also considered that the promotion of renewable energy manufacturing in Hull is causing a concentration of that sector in Hull & the East Riding.
- 2.173 It was stated that occupiers will typically look for property from Junction 31 to 36 of the M62 due to the importance of major transport nodes. The consensus amongst agents was that there has been a concentration of national occupiers in the west of the district towards Sherburn, with a scarcity of activity happening towards York. However constraints within York are causing occupiers to consider Selby.
- 2.174 The role of Selby in helping to address shortfalls in certain types of employment land in York, which has a constraining Green Belt, was a key comment that emerged from the representations made on the 2015 Draft ELR.
- 2.175 The agents suggested that if occupiers were looking for space within Leeds, they would only consider Leeds. However the overall consensus was that Selby District is very different to the Leeds market, partly due to new Leeds Enterprise Zone and also the quality of stock available.
- 2.176 It was also noted that an angle for driving occupier demand in Selby could be to broaden the site allocations to allow for a wide range of uses so as to not restrict potential



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occupiers. Equally, the lack of development land and high quality stock within Selby is hindering interest somewhat.

- 2.177 The agents consulted felt that it is difficult to define specific functional economic areas due to the overall need for new build industrial property in Selby district as a whole.

## Office sector

### *Supply*

- 2.178 Whilst there is only a limited office sector in Selby District, prospective occupiers have a range of office formats to choose from. At Abbey Court, which forms part of Selby Business Park, Priority Sites developed 15 high quality self-contained offices ranging in size from 131 sq.m (1,414 sq.ft) to 228 sq.m (2,449 sq.ft) and made them available to buy or let.
- 2.179 Similarly, at Escrick Business Park, north of Selby, S Harrison is marketing a new-build scheme of 19 offices ranging in size from 124 sq.m (1,224 sq.ft) to 502 sq.m (5,400 sq.ft) although certain units can be combined to create larger accommodation. The properties are available to buy or let and each is allocated generous parking provision.
- 2.180 North east of Selby, in proximity to North Duffield, is Blackwood Hall Business Park. The scheme comprises self-contained offices and light industrial units, a number of which can be occupied on a co-located basis (office and industrial buildings in a semi-detached configuration and occupied by the same business). Properties at the business park are occupied on a traditional basis (i.e. by way of a lease, with rent and a service charge being payable). Occupiers also benefit from on-site services associated with incubator style business centres such as on-site meeting facilities and business advice services.
- 2.181 Selby District also offers office accommodation typical of sub-regional market towns – office suites above ground floor uses – particularly in Selby town. This is a format which typically attracts small local businesses which require basic and affordable office accommodation in central locations, often on or immediately off the high street. Much of this office accommodation is of secondary or tertiary quality. The size of these office suites are often at or around 100 sq.m (1,076 sq.ft).

### Availability

- 2.182 According to Costar Suite property market database<sup>2</sup>, as of 4<sup>th</sup> April 2016 there were 23 office properties available to buy and 83 spaces available to let in Selby District with a combined floorspace of approximately 13,247 sq.m (142,590 sq.ft). According to the data, quoted rents range from £54 to £156 per sq.m (£5 to £14.50 per sq.ft). The average rent from the data extracted is £118 per sq.m (£11 per sq.ft).
- 2.183 The vast majority of available units are existing stock (94%), with 6% classed as a proposed development.
- 2.184 The table below shows the breakdown of available office accommodation to let organised by the major settlements, as recorded by Costar Suite.

Figure 2.21: Office availability to let

Location	No. of Entries	Total sq.m Available	Total sq.ft Available
Selby	3	1,166	12,549
Sherburn-in-Elmet	1	440	4,732
Tadcaster	3	2,886	31,069
Rural / Other	11	8,755	94,240

Source: Costar Suite, 2016

- 2.185 The table above provides a mixed picture. A large proportion of vacant office space is located in Escrick and other rural areas, with a much lesser amount of availability in Sherburn-in-Elmet and Selby. Of the 94,240 sq.ft of vacant space in Escrick and rural areas, 26,918 sq.ft is based at the Escrick Business Park by S Harrison Developments.
- 2.186 The table below shows the breakdown of available office accommodation for sale organised by the major settlements, as recorded by Costar Suite.

<sup>2</sup> Office data extracted from CoStar database relates to the B1(a) use class. It is categorised by CoStar as "B1 Office/Business". The data has been sense-checked to ensure it relates to B1(a) use class properties.

Figure 2.22: Office availability for sale

Location	No. of Entries	Total sq.m Available	Total sq.ft Available
Selby	8	1,214	13,062
Sherburn-in-Elmet	1	1,132	12,188
Tadcaster	1	1,791	19,278
Rural / Other	13	2,815	30,299

Source: Costar Suite, 2016

2.187 Again, within the above data is a large portion from Escrick Business Park and also a scheme in Selby at Abbey Court (Selby Business Park). The one property in Tadcaster – Units 1 to 9 Southbank at Croft lane, is a development in the process of construction.

#### *Demand and recent transactions - Office lease transactions*

2.188 Desk-top analysis using the Costar Suite database reveals that in the last 36 months (April 2013 to April 2016) there have been 13 recorded office lease transactions in Selby District. Approximately 1,687 sq.m (18,156 sq.ft) of office space was recorded as having been transacted, equating to an average take-up per year of 562 sq.m (6,052 sq.ft).<sup>3</sup>

2.189 One transaction related to an office suite which is larger than 500 sq.m (5,382 sq.ft). Three transactions related to properties between 500 sq.m and 100 sq.m (1,076 sq.ft) and nine related to units of less than 100 sq.m . The largest recorded lease transaction related to a total of 568 sq.m (6,118 sq.ft) – a letting at Aviation Road in Sherburn, recorded in November 2015. All 13 transactions were new leases therefore mitigating any skewed data caused by lease renewals, sub-lettings or assignments.

2.190 Between January and November 2015 there were four recorded office transactions in the District across Selby, Sherburn and Riccall. All seven transactions in 2014 were in Selby. Both transactions in 2013 were also in Selby.

2.191 The table below shows the breakdown of office lease deals organised by the major settlements, as recorded by Costar Suite.

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<sup>3</sup> It should be noted that not all office transactions will have been captured by the database as some transactions will not be made public or shared with Costar researchers. The 13 transactions do not, therefore, necessarily represent the true level of market activity but the database does provide the best source of collated transactional information.

Figure 2.23: Office lease deals

Location	Recorded Office Transactions		
	2015	2014	2013
Selby	2	7	2
Sherburn-in-Elmet	1	-	-
Tadcaster	-	-	-
Rural / Other	1	-	-

Source: Costar Suite, 2016 (Totals for 2016 to 4<sup>th</sup> April 2016 = 0)

#### *Demand and recent transactions - Office investment transactions*

- 2.192 Costar Suite database also shows that in the last 36 months (April 2013 to April 2016) there have been four recorded office investment transactions in Selby District. Approximately 1,471 sq.m (15,838 sq.ft) of office space was recorded as having been transacted, equating to an average investment per year of 490 sq.m (5,279 sq.ft).<sup>4</sup>
- 2.193 One transaction related to an office suite which is larger than 500 sq.m (5,382 sq.ft). Two transactions related to properties between 500 sq.m and 100 sq.m (1,076 sq.ft) and one related to units of less than 100 sq.m. The largest recorded investment transaction related a total of 1,018 sq.m (10,958 sq.ft) – the sale of the Former Selby Magistrates Court, recorded in December 2014.
- 2.194 The table below shows the breakdown of office investment deals over the last 36 months organised by the major settlements, as recorded by Costar Suite.

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<sup>4</sup> It should be noted that not all office transactions will have been captured by the database as some transactions will not be made public or shared with Costar researchers. The 4 transactions do not, therefore, necessarily represent the true level of market activity but the database does provide the best source of collated transactional information.

Figure 2.24: Office investment deals

Location	Recorded Office Transactions		
	2015	2014	2013
Selby	1	2	-
Sherburn-in-Elmet	-	1	-
Tadcaster	-	-	-
Rural / Other	-	-	-

Source: Costar Suite, 2016 (Totals for 2016 to 4<sup>th</sup> April 2016 = 0)

## Industrial sector

### Supply

- 2.195 Selby District has a varied industrial property offer (B1c, B2 and B8). Selby itself and Sherburn-in-Elmet act as key industrial locations. The existing stock varies in terms of type and quality from modern large single-occupier units to multi-let secondary and tertiary units.
- 2.196 Access 63 is a significant speculatively developed industrial development located to the south-east of Selby delivered by Shepherd Developments. Units range in size from 1,393 sq.m (15,000 sq.ft) to 6,038 sq.m (65,000 sq.ft) and are available on a freehold or leasehold basis.
- 2.197 Sherburn Distribution Park is an established distribution location to the north-east of Junction 43 of the A1(M). Units 190, 330 and 550 are currently marketed for sale or to let and extend to 17,648 sq.m (189,965 sq.ft), 30,695 sq.m (330,401 sq.ft) and 51,126 sq.m (550,336 sq.ft) respectively.
- 2.198 S Harrisons' Escrick Business Park, north of Selby, comprises 14 warehouses, available to buy or let, with units ranging in size from 116 sq.m (1,250 sq.ft) to 474 sq.m (5,100 sq.ft). A number of these units can be combined to create larger accommodation.
- 2.199 At Blackwood Hall Business Park near North Duffield, a selection of the industrial units can be occupied on a co-location basis with the office accommodation. Similarly to the

office accommodation, units can be occupied on a traditional basis (i.e. by way of a lease, with rent and a service charge being payable).

### *Availability*

- 2.200 According to Costar Suite property market database<sup>5</sup>, as of 4<sup>th</sup> April 2016 there were 9 industrial properties available to buy and 12 industrial properties available to let in Selby District with a combined floorspace of approximately 28,750 sq.m (309,467 sq.ft). According to the data, quoted rents range from £26.37 to £84.50 per sq.m (£2.45 to £7.85 per sq.ft). The average rent from the data extracted is £62.22 per sq.m (£5.78 per sq.ft).
- 2.201 The table below shows the breakdown of available industrial accommodation to let organised by the major settlements, as recorded by Costar Suite.

*Figure 2.24: Industrial availability to let*

Location	No. of Entries	Total sq.m Available	Total sq.ft Available
Selby	2	654	7,043
Sherburn-in-Elmet	3	4,736	50,981
Tadcaster	-	-	-
Rural / Other	7	6,867	73,915

Source: Costar Suite, 2016

- 2.202 The data shows that 56% of the available stock of industrial accommodation is located in the rural areas mostly to the north east of Selby district, with approximately 39% of stock located in Sherburn. The size of the units in Sherburn (at an average floor area of 1,579 sq.m/16,993 sq.ft) would suggest that these units are arguably too small for the nationally focused occupiers looking to locate in this area, as we know from the discussions with agents that they are largely interested in properties over 20,000 sq.ft.
- 2.203 The table below shows the breakdown of available industrial accommodation for sale organised by the major settlements, as recorded by Costar Suite.

<sup>5</sup> Industrial data extracted from CoStar database, relating to B1(c), B2 and B8 use classes, are all categorised by CoStar as "industrial" with categories including general industrial, industrial/warehousing and light industrial.

Figure 2.26: Industrial availability for sale

Location	No. of Entries	Total sq.m Available	Total sq.ft Available
Selby	1	82	883
Sherburn-in-Elmet	3	5,6132	60,423
Tadcaster	-	-	-
Rural / Other	5	10,797	116,222

Source: Costar Suite, 2016

2.204 The data above shows a large portion of available industrial space for sale in rural Selby, mostly relating to Escrick Business Park. In addition to that is a relatively large amount of industrial space for sale in Sherburn, of which the largest unit extends to approximately 27,000 sq.ft. There is a distinct lack of investment options for industrial properties in Selby as demonstrated by the above opportunities.

#### *Demand and recent transactions - Industrial lease transactions*

2.205 Desk-top analysis using the Costar Suite database reveals that in the last 36 months (April 2013 to April 2016) there have been 55 recorded industrial lease transactions in Selby District. Approximately 72,019 sq.m (775,200 sq.ft) of industrial space was recorded as having been transacted, equating to an average take-up per year of 24,006 sq.m (258,400 sq.ft).<sup>6</sup>

2.206 One lease transaction related to an industrial unit which is larger than 5,000 sq.m (53,820 sq.ft), being a lease transaction of 51,654 sq.m (556,000 sq.ft) at Hurricane Way in Sherburn, recorded in February 2016. Three transactions related to properties between 1,000 sq.m (10,764 sq.ft) to 5,000 sq.m and 51 related to units of less than 1,000 sq.m.

2.207 The table below outlines the industrial lettings, separated across areas within the district and by year signed.

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<sup>6</sup> It should be noted that not all industrial transactions will have been captured by the database as some transactions will not be made public or shared with Costar researchers. The 55 transactions do not, therefore, necessarily represent the true level of market activity but the database does provide the best source of collated transactional information.

Figure 2.27: Industrial lease deals

Location	Recorded Industrial Lease Transactions			
	2016	2015	2014	2013
Selby	1	10	16	6
Sherburn-in-Elmet	-	1	-	-
Tadcaster	-	-	-	1
Rural / Other	1	4	9	6

Source: Costar Suite, 2016

#### *Demand and recent transactions - Industrial investment transactions*

- 2.208 Costar Suite also shows that in the last 36 months (April 2013 to April 2016) there have been 17 recorded industrial investment transactions in Selby District. Approximately 210,390 sq.m (2,264,612 sq.ft) of industrial space was recorded as having been transacted, equating to an average investment per year of 70,130 sq.m (754,871 sq.ft).<sup>7</sup>
- 2.209 One industrial investment transaction totalled 127,478 sq.m (1,372,170 sq.ft) which was approximately twice the size of the second largest property. The smallest industrial property sold extended to 120 sq.m (1,287 sq.ft).
- 2.210 The table below outlines the industrial property transactions separated by areas within the district and by date of transaction.

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<sup>7</sup> It should be noted that not all industrial transactions will have been captured by the database as some transactions will not be made public or shared with Costar researchers. The 17 transactions do not, therefore, necessarily represent the true level of market activity but the database does provide the best source of collated transactional information.



Figure 2.28: Industrial investment deals

Location	Recorded Industrial Transactions		
	2015	2014	2013
Selby	3	1	-
Sherburn-in-Elmet	4	3	3
Tadcaster	-	-	-
Rural / Other	2	1	0

Source: Costar Suite, 2016 (Totals for 2016 to 4<sup>th</sup> April 2016 = 0)

## The impact of BREXIT

### *Uncertainty following the EU referendum*

- 2.211 Following the referendum held on 23<sup>rd</sup> June 2016 concerning the UK's membership of the EU, a decision was taken to exit. It is likely that the exit will take some 18-24 months although the timing is presently uncertain. This combination of macro-economic, legal and political circumstances is unprecedented within the UK property market and therefore we would caution that we are now in a period of significant uncertainty in relation to many factors that act as drivers of the property investment and occupational markets and the consequent impact on values.
- 2.212 We would therefore caution that the market commentary provided in the section above (prepared in April 2016) is now subject to a degree of abnormal uncertainty.
- 2.213 We provide some high level commentary on Brexit below.

### *Economic context*

- 2.214 The UK's vote to leave the EU will herald one of the most significant changes in our political and economic landscape of the last 50 years. However, it is important to remember that today's situation is not comparable with the 2008 financial crisis. This is a political, not a financial problem, and the main impacts on the economy are indirect, at least in the short term.
- 2.215 Following the initial impact in late June and early July, financial markets appear to have settled down, helped by the faster than expected formation of the new government.

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There has undoubtedly been a significant impact on business and consumer confidence, however, after a new Cabinet was announced business confidence had broadly recovered following the initial shock of the Brexit vote.

- 2.216 A sharp slowdown in growth in the second half of this year is expected, and this will reduce GDP growth from the 1.8% previously forecast to 1.5% for 2016 as a whole. Prior to the referendum, a respectable 2.1% was forecast for 2017 (albeit still below trend). This has now been reduced to just 0.5%, implying that a technical recession (two successive quarters of declining output) is very possible, although not a certainty.
- 2.217 CPI inflation edged up to 0.5% in June from 0.3% in May. The rate will rise further in the coming months due to Sterling's devaluation and is likely to reach at least 2.5% next year.
- 2.218 The Bank of England deployed further stimulus in August to boost domestic demand. This included a reduction in the Base Rate to 0.25% and an injection of £70 billion into the economy through the purchase of government and corporate bonds (quantitative easing). The Bank may well use further stimulus measures in the coming months, although there is only so much that this can achieve, particularly as interest rates are already close to zero. Certainly, the Bank is not concerned at the prospect of inflation rising towards the top of its target range at this stage.
- 2.219 Any further significant stimulus measures will need to come through fiscal rather than monetary measures and the Autumn Statement, expected in late November or early December, could include tax cuts or increases in infrastructure spending.
- 2.220 Public sector debt will be higher than previously forecast and the target of eliminating the budget deficit (annual borrowing) by 2020 has already been abandoned. On the positive side the cost to the government of borrowing has reduced (10-year gilt yields are currently below 0.7%, compared to 1.3% pre-Brexit). In the longer term, however, this could reverse if the UK's sovereign debt rating sees further downgrades.
- 2.221 The longer-term impact of 'Brexit' remains highly uncertain, and much will depend on the type of trade deal that can be negotiated. A number of economic studies on the long-term impact have been undertaken. Most suggest a marked negative effect, but the wide range of possible impacts underlines the uncertainty.

2.222 Whilst any attempt to quantify the effect of 'Brexit' is highly speculative, the impact will undoubtedly be felt across all areas of our economy, including trade volumes, foreign direct investment levels, exchange rates and borrowing costs. Key to the UK's success will be raising the country's poor productivity record. The challenge will be to use 'Brexit' as an opportunity to do so.

#### *Occupier market*

2.223 As set out above, the recent development cycle has been relatively subdued. As a result, most commercial occupier markets are not in an oversupply situation, and many are experiencing a shortage of prime stock. This will help insulate rental levels from a post-referendum slowdown in demand. Some falls in rental levels are inevitable, and this will provide opportunities for occupiers looking to re-gear or take new space.

2.224 It will be months, indeed probably years, until we know the full impact of Brexit on occupier demand. The biggest potential effect comes from any changes to the cost and ease of trading with the EU. But Brexit could have huge impacts across a wide range of areas, ranging from adverse consumer sentiment, exchange rate impacts, and the effect on the labour market - particularly for those businesses that rely heavily on EU nationals.

2.225 Demand across the 'Big Nine' regional office centres held up well in Q2, just 3% below the five-year average. Underlying demand remains strong, buoyed by the reorganisation of the public sector estate and a large number of private sector lease events. However, some occupiers have been reviewing their position post-Brexit and this will impact on take-up during the second half of the year. Prime rents were stable in Q2.

2.226 We remain positive about the prospects for the industrial and logistics sectors. Manufacturers won't escape the economic impacts, but the positive effect of weaker Sterling will help to offset this. The huge shifts in the retail market will continue despite Brexit, and retailers will still need to respond to changing logistics requirements. Against a background of limited supply in many key locations, the logistics sector looks in a relatively strong position. The recent strong rate of average rental growth continued in Q2, with a rise of 0.8%. Average rental values are now 4% higher than in Q2 2015.

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### *Investment market*

- 2.227 The volume of commercial property investment transactions in Q2 was circa £11.5 billion, the lowest since Q2 2013. Although some transactions have been aborted and many are taking longer as buyer and seller negotiate on price, a sizeable number of transactions are still being completed.
- 2.228 Indeed, overseas buyers will continue to benefit from the devaluation of Sterling, and there is a huge amount of global capital looking to invest in property. Some UK property companies are taking the opportunity presented by the re-pricing to bid for properties previously not within their reach.
- 2.229 We believe that average capital values are broadly 5% below their pre-referendum levels, based on transactions completed over recent weeks. However, this will vary considerably according to the type and quality of property. The decline is more pronounced for higher risk assets such as those with short leases or short term development potential. Conversely, long dated secure income remains very highly sought after and pricing is largely unaltered. The pricing impact reduces the higher the quality of the asset. The distribution/logistics sector is proving resilient, and prime retail is also performing relatively well.
- 2.230 The coming months should provide more certainty on values and this should mean an increase in buyer confidence. Markets tend to overcorrect, and values could see a rebound, although not back to pre-Brexit levels.
- 2.231 Recent pricing adjustments undoubtedly reflect the greater level of uncertainty in the occupier market. However, the investment market had been slowing prior to the referendum, and Brexit may simply have accelerated a correction that was likely to have occurred anyway.

### **Business engagement**

- 2.232 As part of preparing this Employment Land Review, consultation has taken place with local businesses to seek their views. This consultation feedback is as reported in the 2015 Draft ELR.
- 2.233 The businesses to be approached were identified by the Council from a range of locations including Selby, Sherburn in Elmet and Tadcaster.
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- 2.234 The consultations were carried out by telephone correspondence and via email; this was dependent on the consultee's preference. 13 businesses contacted were willing to participate in the survey. A large number of businesses were unwilling to take part in the survey and for this reason it must be advised that the views gained may not be representative of the views of all businesses. The companies that were contacted will remain anonymous.
- 2.235 71 businesses were contacted in total from a list provided by the council. 58 businesses either refused to complete the survey or did not respond to several attempts to contact via email and telephone.

### Employees

- 2.236 Of the 13 companies contacted, 10 had 1-10 people employed at the premises. The remaining 3 companies had 21+ people currently employed. This demonstrates that of those surveyed more smaller businesses located in the area were willing to respond to the questionnaires.

### Change in employment rates

- 2.237 69% of businesses commented on the fact that there had been no change or very minimal change over the last 5 years in relation to employee numbers at the premises. The remaining 31% observed that for them, employee numbers had changed considerably over the last 5 years, mainly as a result of the downturn in the economy. The company which experienced an increase over the 5 years commented on the fact that it had recently increased in size meaning it required more staff.

### Employment travel

- 2.238 With regards to how far the employees travel, there was a split with between those whose employees travel from outside of the Selby District (46%) and those whose employees travel from within the Selby District (but the distance is further than walking and cycling distance) (46%). There was only one business where the majority of their staff travelled from within walking and cycling distance. Those businesses whose employees were located outside of the Selby District travelled from areas which included Bradford, Leeds, York, Bedale and Manchester.
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### Type of employees

2.239 The overall split between managerial/skilled workers and administrative/non-skilled workers was variable. 38% of businesses had a split of 0-33% managerial/skilled workers with mostly administrative/non-skilled workers. 24% of businesses had between 33-66% managerial/skilled workers. 38% of businesses had above 66% managerial/skilled workers.

### Recruitment issues

2.240 Over the past 5 years it was noted that the majority of businesses (72%) in the survey did not face any issues with recruitment. The small majority that did either had issues with recruiting skilled workers, or issues with recruiting non-skilled workers. This difficulty was either due to a lack of resources to recruit non-skilled workers, or the difficulty in finding employees with specific skills.

### Operational period

2.241 When looking into how long the businesses have been operational within the Selby District, the majority had been operational for 11-20 years. There was 1 company that had been operational for 0-10 years, 2 businesses that had been operational for 21-30 years and 2 that had been operational for more than 30 years. The lowest figure in the dataset was 8 years and the highest figure was 46 years.

### Time at premises

2.242 The number of years that the businesses have been at their current premises is similar to the years of operation data, with most companies falling into the 11-20 years category. 4 companies (31%) fell in the 0-10 year's category and 2 companies (15%) fell within the 31+ years category. The lowest figure again was 8 years and the highest figure was 46 years. This indicates that businesses appear to remain with their premises, with limited relocation.

### Reasons for business location

2.243 In relation to business reasons for locating in Selby District, these indicated a draw due to the transport links with mention of the A1 and M62 links, and links to the area through a family base or customer base. A need for easy access for staff who work for the company

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was stated as an influence. Some of the businesses commented on the suitability of their site with good rates and large enough premises for expansion.

### Site/premises satisfaction rate

2.244 The majority of the businesses (80%) that took part in the survey were satisfied with both their site and premises in relation to meeting their existing and future needs. There were 5 businesses (20%) that did not feel their site/premises met their needs. The reason for this dissatisfaction came down to a need for a larger premises or more space. One company commented on the fact that they were located in the “middle of nowhere” which made it difficult to attract employees. Employment came down to their willingness to travel to work. They also commented on the fact that the bus services were not regular enough to coincide with their start time.

### Willingness to stay in Selby District

2.245 When asked if these businesses would be willing to relocate back to the Selby District if they were to move in the future, 7 of businesses (54%) stated they would relocate back to the Selby District and 6 (46%) stated they would not choose to relocate back to the Selby District. The businesses that would relocate back to the Selby District were happy with the central location, making it easier for staff and clients to travel to the business.

### Future prospects

2.246 Over the next 5 years, 50% of businesses surveyed were not anticipating any change in their prospects. 4 of the companies (25%) were hoping for a higher value output in the next 5 years and 25% of companies were looking for employment growth in the next 5 years as well as a changing market for their product.

### Reason for future prospects

2.247 In relation to reasons for their views, one company stated that they were happy with the current running of the business. One company was pushing to keep the same amount of staff but wanted a higher value output so the business could grow. One company mentioned that due to the improvement in the housing market they were expecting an increase in staff which they hope will result in an improved value output. Another

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company was hoping to relocate to a larger building and with this move hope for an increase in employment opportunities and a higher value output.

### Investment plans

- 2.248 The majority of the businesses contacted for this survey (77%) did not have any current plans to invest in their premises, facilities or operations over the next 5 years. 3 businesses (23%) had plans to invest in their company over the next 5 years, with plans including updating and replacing old equipment for the company, and investment in a new office for an expanding business.
- 2.249 Of the businesses that planned on investing in their premises only one already had funding in place (shareholder funds which had been set aside for development purposes). The other 2 companies did not have funding in place.

### Regional Growth Fund

- 2.250 Out of the 13 companies contacted, 6 of the businesses (46%) had already heard of the Regional Growth Fund (RGF). 7 of the businesses (54%) had not heard of the RGF. One of the companies contacted was aware of the RGF but did not know if they were eligible to receive it. Most of the companies that had not heard of the RGF wanted to know what it was and if they were eligible to receive it/if it was applicable for their industry. Nearly all of the respondents (92%) did not consider that they have investment requirements or plans which might require grant funding. This must be seen in the context of the above statement that the majority of businesses had not heard of the RGF.

### Adjacent authorities

- 2.251 As recognised in the NPPF, it is relevant to consider the employment land position, both current and in terms of forward planning policy, of adjacent authority areas when considering the future position for Selby. This approach forms part of the Council's Duty to Co-operate; a requirement of the Localism Act.
- 2.252 In addition by a review of their evidence base, the adjacent authorities have been contacted as part of the undertaking of this ELR to seek a better understanding of their employment land position. Direct discussions were held with each local authority in April 2016.



## Leeds

- 2.253 The Leeds ELR was originally produced in 2006 by ARUP with an update approved by the Council in 2010. This remains the latest published position on the Council's related webpage, albeit we are aware that an ELR 2015 is being / has been prepared.
- 2.254 The Leeds Employment Land Review Update 2010 and Spatial Policy 9 of the adopted Core Strategy identifies a requirement for 706,250 sq.m. office (B1a class) floorspace in the district. 840,000 sq.m. already exist in planning permissions.
- 2.255 A requirement for a minimum of 493 ha of land for general employment uses such as research and development, industrial and distribution/warehousing uses in the District (B1b, B1c, B2 and B8 classes) is also identified.
- 2.256 The ELR identifies a potential shortfall of available employment land in some areas of the district, with surpluses in other areas. The Outer North East and the Outer East, the closest locations to the Selby Council boundary, are not identified as areas of shortfall.
- 2.257 The emerging Site Allocations in Leeds identifies large sites at Thorpe Arch, Hawks Park Garforth and Peckfield Business Park, Micklefield as suitable for future allocation in proximity to the Selby District boundary.
- 2.258 Despite several attempts, we have been unable to speak directly with representatives of either the planning policy or economic development departments to further discuss employment land supply considerations.

## York

- 2.259 The latest ELR prepared by York Council is dated July 2016. This identifies a requirement for 11.4ha of land for b1a, 2.7ha of land for B1b, 2ha of land for B1c, 0ha of land for B2, and 17.2ha of land for B8.
- 2.260 York has also very recently published its Local Plan Preferred Sites Consultation (July 2016). This reflects the ELR demand figures and identifies the following large sites included in the supply to meet the requirements: York Central (B1a), Land South of Elvington Airfield (B1b, B1c, B2, B8), Northminster Business Park (B1c, B2, B8) and University of York (B1b). Land North of Grimston Bar is identified as safeguarded land (B1c, B2, B8).
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2.261 It is understood that York Council considers their emerging Local Plan to be purposefully ambitious in terms of economic growth (linked to ambitious housing growth). The York City Council emerging Local Plan Publication document (2014), albeit halted in October 2014, states the following:

*In more recent times, the city's economy has moved towards being based on a service industry including both tourism as well as knowledge-based industries. The city has a number of key sector strengths. These include: the healthcare and bioscience sectors, rail, environmental and bio-renewable technologies, IT and digital companies, creative industries and financial and professional services.*

2.262 We have also spoken directly with both the planning policy and economic development departments at the Council / Make it York.

2.263 The main existing employment locations were identified as the Universities, Monks Cross, North Minster Business Park, York Central and the City Centre.

2.264 York Central was noted as a major future employment site, which was eligible for a small amount of LEP funding towards early infrastructure work. This scheme is now part of York's Enterprise Zone.

2.265 Both contacts stated that demand in the area is largely driven by movement from within Yorkshire, however York is trying to attract more inward investment.

2.266 The main economic drivers for York are seen as its excellent transport connectivity, including rail links. The contacts stated that York is aiming to promote development of the land around the station due to excellent links to London, Edinburgh, Leeds and Manchester which is a major selling point for York's employment land offer. They stated that there are some issues with York's ring road, but noted that the Selby-side of the ring road is generally an excellent transport corridor.

2.267 The contacts stated that York Council are currently putting together an updated Economic Strategy which will outline the key economic sectors that York will target for investment into the future. The contact also stated that a diverse strategy is going to be key, and suggested that biosciences (industrial, agricultures and healthcare), finance/professional services (particularly insurance), creative/digital and IT, University

and Education, rail, and food and drink are the likely economic sectors that will be targeted.

- 2.268 A strong economic relationship between Selby and York was recognised. It was noted that there are more employees migrating from Selby to York than York to Selby. With close proximity to Selby, the contacts felt that the strong labour movements and shared transport links suggest that York and Selby could support each other's economic growth. As opposed to being in competition it is considered that there is an opportunity to work together.
- 2.269 It was considered that there is a pull of office demand to York and a drive of industrial demand towards Selby – especially so in biotech manufacturing. In terms of B8 uses, again, York was identified as suffering from leakage of B8 uses due to land availability and arguably better road transport links elsewhere.

### East Riding of Yorkshire

- 2.270 The East Riding of Yorkshire ELR was produced by GVA in 2013 and replaces those produced previously in 2007, 2009 and 2011. The 2013 ELR provides the Evidence Base associated with the emerging Local Plan. There was a 10 page Addendum produced in 2014 that backed up assumptions regarding Siemens involvement in the area.
- 2.271 The ELR identifies FEAs across the East Riding, one of which is the Goole and Selby FEA, demonstrating functional economic linkages between the towns of Goole and Selby and their surrounding areas.
- 2.272 The Goole and Selby FEA is noted to be fairly self-contained, sharing its closest economic linkages with Selby to the west.
- 2.273 The Strategy and Allocations Documents which form the emerging East Riding Local Plan, were submitted for Examination in April 2014. Examination hearings were held in October and November 2014. The Strategy Document was adopted in April 2016 and the allocations document is very close to adoption.
- 2.274 Policy S6 of the Strategy Document states that the future needs of the East Riding economy will be met through the allocation of at least 235 hectares of employment land on a broad range of sites. The split is proposed to be:

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- 55 ha for B1 uses – predominantly in the Major Haltemprice Settlements and the Principal Towns, ensuring that, with regards to the Major Haltemprice Settlements and Beverley, such uses are complementary to developments in Hull City Centre.
  - 65 ha for B2 uses – spread across a range of sites around the East Riding.
  - 115 ha for B8 uses – primarily at locations along the East-West Multi-Modal Transport Corridor, as the prime location for storage and distribution uses which generate large freight movements.
- 2.275 205 hectares of land will also be allocated at Hedon Haven to cater for the expansion of the Port of Hull.
- 2.276 The emerging Allocations document identifies four Key Employment Sites. The closest to Selby is Capitol Park (Goole) which is located to the south-east of Selby. This site is well placed to take advantage of the excellent assets and transport links in the East-West Multi-Modal Transport Corridor.
- 2.277 Other allocated sites in the Goole and Selby FEA include Green Park at Newport (M62/A63), land at Ozone Business Park (Howden) and Land at Glews Hollow (north of junction 36 of the M62).
- 2.278 We have also spoken directly with both the planning policy and economic development departments at the Council.
- 2.279 The contacts confirmed that Goole 36 (Capitol Park) is a strategic site close to Selby District, with particular focus on industrial and logistics (and benefitting from LEP infrastructure funding), and the employment allocation in Howden was also mentioned as worthy of note. Away from Selby it was mentioned that there are other strategic sites at Melton (Melton West and Melton Park) which are in high demand, and Humber Bridgehead.
- 2.280 The contacts stated that East Riding of Yorkshire experiences investment and growth from a wide range of sources; from indigenous growth to sub-regional investment and inward investment from outside of the sub-region. The contacts specified that Goole, as a destination, is seeing noticeable amounts of inward investment due to its proximity to transport connections.
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- 2.281 The contacts considered that the main USP for East Riding of Yorkshire is its excellent connectivity via the M62 and A63. In addition the Port of Hull is an attractive prospect to many investors from outside of the region.
- 2.282 It was stated that East Riding of Yorkshire currently has an Economic Strategy which specifies renewable energy, agriculture and food manufacturing, port logistics and chemical manufacturing as its main sectors.
- 2.283 In terms of connections to Selby, it was stated that the East Riding of Yorkshire is a big exporter of labour to Selby, specifically in relation to employment at Drax power station.
- 2.284 In terms of leakage / competition between the two authority areas, it was not considered that there is any significant competition or movement of demand between Selby and the East Riding of Yorkshire. However, there are similarities in terms of certain sectors – for example, glass and food manufacturing.
- 2.285 The redevelopment of the Kellingley Colliery site, which benefits from inland waterway connections was supported.

## Wakefield

- 2.286 The Core Strategy (adopted April 2009) identifies a need for commercial offices (in city/town centres), light & general industry and wholesale & freight distribution.
- 2.287 The office market in Wakefield District is affected by its relative proximity to Leeds with a concentration of public sector office employment in the city centre. In recent years office parks have been built on the edge of Wakefield at Calder Park, Paragon Park and Silkwood Park, all close to the M1 motorway.
- 2.288 Due to its location the district has attracted large warehouse developments, including the Wakefield Europort freight interchange facility. An average of 17 hectares a year was developed for warehousing and distribution in the M1/M62 corridor between 1996 and 2005.
- 2.289 The Core Strategy states that the results of monitoring show a sufficient supply of employment land across the district at the end of March 2007 to meet demand for the next 15 years, however account needs to be taken of the quality, location and availability of sites to meet specific types of employment use.
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- 2.290 Most new development will take place within the urban areas to take advantage of existing services and high levels of accessibility.
- 2.291 Core Policy CS8 states that in total a gross supply of 350 hectares of prime employment land is proposed in the district up to 2021. 255 hectares of this land is currently available (75 ha for commercial office development, 85 ha for light and general industry and 95 ha for wholesale and freight distribution) (as at 2009). The remaining 95 ha will be identified for wholesale and freight distribution, along the M62 corridor.
- 2.292 The policy seeks to focus commercial offices in Wakefield City Centre and in Castleford and Pontefract, within the existing office parks, and at the Former Prince of Wales Colliery. In terms of light and general industrial, the policy seeks to focus these in the urban area / employment allocations or existing employment zones, at Silkwood Park; Green Lane, Featherstone; South Kirby Business Park and Glasshoughton. Wholesale and Freight Distribution will be focused at Normanton Industrial Estate and other locations along the M62 as allocated, or in existing employment zones.
- 2.293 The Council's latest Annual Monitoring Report states that they have 284.41ha of employment land remaining, 177.51ha of which is located on Prime Sites.
- 2.294 The Council adopted the Site Specific Policies Local Plan in September 2012.
- 2.295 We have also spoken directly with the planning policy department at the Council. They agreed that there is a functional economic relationship between Selby and Wakefield, with both areas being located within the Leeds City Region LEP.
- 2.296 The contact indicated that the major focus of employment land in Wakefield, specifically focussing on Prime Sites, is generally along the M62/M1 corridors, including the junction at the A1(M). In addition to these areas, some non-prime sites are dotted across the district in older industrial areas.
- 2.297 It was confirmed that the main strategic sites located within Wakefield are located at junction 30 of the M62, known as Newmarket, as well as the junction at the A1(M) known as Knottingley – currently occupied by a large TK Maxx distribution centre. In addition, there are also business parks located at junctions 39 and 40 of the M1 which are strategic employment sites.
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- 2.298 In recent years, the majority of demand has come from inward and sub-regional investment - for example Haribo, a major confectionary manufacturer, taking occupancy in Pontefract.
- 2.299 The major economic drivers for Wakefield were stated as being its transport links. Access to the M62 and M1 prove to be major catalysts for investment and demand, which the Council are striving to promote. The Council are also trying to increase the quality of jobs and up-skill the labour force.
- 2.300 One of Wakefield's key economic sectors is distribution, but equally digital and creative employment is a sector which the Council is seeking to enhance in the future. The Council is looking to build an agglomeration of music and digital industries, such as the Backstage Academy - which is currently looking to expand within the area.
- 2.301 The contact stated that historically, there has been some export of labour to Selby especially during time of coal mining prominence in the area. At present, there is much less movement of labour to Selby.
- 2.302 The contact considered that the relationship functional relationship between Wakefield and Leeds is much more prominent than that between Wakefield and Selby.
- 2.303 The contact stated that the promotion of Selby's transport corridors could prove popular, as could the redevelopment of Kellingley Colliery.

## Doncaster

- 2.304 In September 2014, the Council decided to withdraw the LDF Sites and Policies Development Plan Document and to proceed with the preparation of a new Local Plan. Upon adoption this will replace the Core Strategy (adopted May 2012) and the saved policies of the Doncaster UDP (adopted 1998).
- 2.305 The Employment Land Review was produced in December 2009 and with an update note produced in 2011. An Employment Land Availability Report was produced in 2014 and again in 2015.
- 2.306 The Doncaster Core Strategy provides slightly updated figures. It states that due to the location of Doncaster close to the motorway network the strategic warehousing sector has been growing. Policy CS2 indicates that an additional 290 hectares (net) of
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- additional distribution warehousing will be allocated, with the broad locations being the M18/M180 corridor at junctions close to Armthorpe, Stainforth/Hatfield and/or Thorne and the Strategic Rail Freight/Interchange at Rossington. Policy CS5 gives priority to sites at the proposed Strategic Rail Freight Interchange at Rossington which it is envisaged will provide approximately 166 hectares.
- 2.307 Other requirements of Policy CS2 include a requirement for an additional 140,000 sqm of office (B1) floorspace predominantly in Doncaster Town Centre, and 190ha for light industry and manufacturing to be provided in accordance with the settlement hierarchy.
- 2.308 Policy CS2 also identifies a requirement for 34ha of existing land at Robin Hood Airport for businesses related to the airport, plus 10ha to the west of the airport for longer term expansion of the business parks and training facilities, plus additional land for freight cargo and maintenance repair and overhaul facilities at the southern end of the runway
- 2.309 The Employment Land Availability Report 2015 identifies that 16 hectares of land over 8 sites has been developed from April 2014 to March 2015. Additionally, 406 ha of land over 42 sites has planning permission, of which 121ha has full planning permission and 285 ha has outline permission. The document states that the remaining supply of employment land in Doncaster has risen significantly in recent years and as of 2015 was 550 hectares.
- 2.310 We have also spoken directly with the planning policy department at the Council. They have informed us that an updated Employment Land Review is currently being written, and that the highest demand for employment land appears to be for logistics.
- 2.311 The contact stated that Doncaster has existing employment locations through the borough at locations including Thorne, Rossington and iPort as well as some much older sites which are primed for redevelopment.
- 2.312 It was stated that Doncaster benefits from inward investment from outside of the region as well as demand at a more local level for employment sites, the attraction being largely due to the excellent transport connections.
- 2.313 The key economic sectors which are prominent in Doncaster are logistics, light industrial, manufacturing and rail freight.
- 2.314 The contact did not feel that there was significant impact on either Doncaster or Selby as a result of the flow of labour between the two areas.
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## Harrogate

- 2.315 An up to date Employment Land Review was undertaken in 2015 by Atkins. The ELR found that consistent growth in the local employment market suggests a future increase in B1 and B8 sector floorspace and land will be required, whilst B2 requirements are likely to fall.
- 2.316 The ELR also states that the surplus B2 uses should be actively pursued for adaption to B1 and B8 use and where surplus B2 space is deemed unfit for B1 and B8 use it should be released for redevelopment.
- 2.317 The Core Strategy adopted in February 2009 identifies three main sectors of the local economy: business development, tourism (both conference & business and holiday) and retail and town centre development.
- 2.318 The Core Strategy states that the focus for economic growth in the District is essentially one of meeting the expansion and re-location needs of local businesses and providing support for small business start-ups to ensure sufficient jobs for the resident population. One of the Core Objectives is to protect and enhance the District's town centres, conference, business and holiday tourism, and the digital and food cluster industries.
- 2.319 Policy JB3 of the Core Strategy states that from 2005-2021 a good range and mix of employment sites will be maintained and enhanced and provision made for some 45 hectares of land for employment including: already committed land in Harrogate Town (4.36 ha), Knaresborough (8.95 ha), Ripon (15.3 ha), rural areas (7.38ha) and Boroughbridge (0.86ha); and new employment land in Harrogate Town/Knaresborough (5ha) and in Boroughbridge (3ha).
- 2.320 The emerging Sites and Policies DPD was withdrawn in 2014 with a key reason being an out of date ELR (now updated).
- 2.321 We have also spoken directly with both the planning policy and economic development departments at the Council.
- 2.322 The contacts stated that there is likely to be a shortfall of town centre office space in Harrogate due to permitted development rights converting vacant office space into residential units. There is also a shortage of vacant brownfield development land in the Borough. Further to this, there is a shortfall of suitably located, high quality employment

product in particular in locations near to transport corridors. It is considered that often the Council has requirements for large sites or a large amount of floor space which cannot be satisfied in Harrogate. As a result the majority of current demand for employment space in Harrogate is driven by local growth. The Council are, however, keen to explore the possibility of inward investment in the future.

- 2.323 The key existing employment locations are found at St James' Park and Manse Lane in Knaresborough, Cardale Park, Hornbeam Park, Claro Park and Plumpton Park in Harrogate, Melmerby Business Park, as well as a number of sites in Ripon, Masham and Tockwith.
- 2.324 Cardale Park, Hornbeam Park, St James' Park and Melmerby Park are considered their most prominent sites. None of these sites have a significant relationship with Selby, however Melmerby Park has a close connection to the A1.
- 2.325 The main economic drivers for Harrogate are considered to be proximity to Harrogate and Knaresborough, and the high quality of life which can be achieved in Harrogate which attracts both potential employers and employees. Proximity to key local roads is important in terms of sites.
- 2.326 It was stated that in the 2009 Core Strategy, the main economic sectors driving Harrogate's employment growth were digital and food industries, however other major economic sectors are financial wealth management, data management, and bio-research. Companies such as Taylors of Harrogate, Harrogate Spring Water and public sector employers are, however, the key players in the market.
- 2.327 The contacts confirmed that Harrogate's main functional economic relationship is with Leeds, where they see major movements of labour / employment demand. In comparison, it was stated that recent research has shown that only 0.5% of the Harrogate-based workforce travels to Selby for work, therefore it is considered that there is only a minimal functional economic relationship between the two areas.
- 2.328 The Council are aware of the Church Fenton site and its promotion for the media/creative/film sectors. It was considered that this would provide complementary opportunities to Harrogate's promoted sectors.

## Functional economic areas

- 2.329 Paragraph 7 of the NPPF states that a key economic role of the planning system is “contributing to building a strong, responsive and competitive economy, by ensuring that sufficient land of the right type is available in the right places and at the right time to support growth and innovation”. This supports the need to consider land supply and demand at a level below local authority boundary level.
- 2.330 PPG develops this idea of the need to understand demand and supply at the more localised level. The guidance notes that demand and supply should be considered at Functional Economic Area (FEA) level, as the most appropriate geography for understanding need. It goes on to state that “no single source of information will be comprehensive in identifying the appropriate assessment area; careful consideration should be given to the appropriateness of each source of information and how they relate to one another.”
- 2.331 Furthermore, in relation to the definition of FEAs, it states: “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.”

2.332 As identified earlier in this report, the Selby District Council Economic Development Strategy Consultation Draft (August 2016) defines an up to date set of FEAs. Key drivers used in the determination of the FEAs were:

- Travel-to-work flows;
- Housing Market Areas (HMAs);
- Service markets (such as retail and hospital catchment areas);
- Supply chains and sectoral clusters;
- Transport networks.

2.333 The travel-to-work data was been taken from the 2011 Census, published by the Office for National Statistics (ONS), enabling the identification of common trends in travel flows in areas across the Selby District and its neighbouring authorities. Its analysis was undertaken using data published at Middle Super Output Area (or MSOA) level, a statistical geography developed by the ONS.

2.334 As stated earlier, the 3 FEAs identified in the EDS are:

- 'Selby North East FEA' includes the city of York and the settlements of Selby and Pocklington;
- 'Selby South East FEA' comprises the settlements of Selby, Goole and Howden;
- 'Selby West FEA' includes part of eastern Leeds, southwest York and the settlements of Selby, Tadcaster, Sherburn-in-Elmet, Castleford and Knottingley.

2.335 These are shown in Figure 2.3 earlier in this report.

2.336 For the purposes of this ELR, and for the geographical classification of sites in the land supply, it has been important to create distinct bounded areas based on the overlapping FEAs in the EDS.

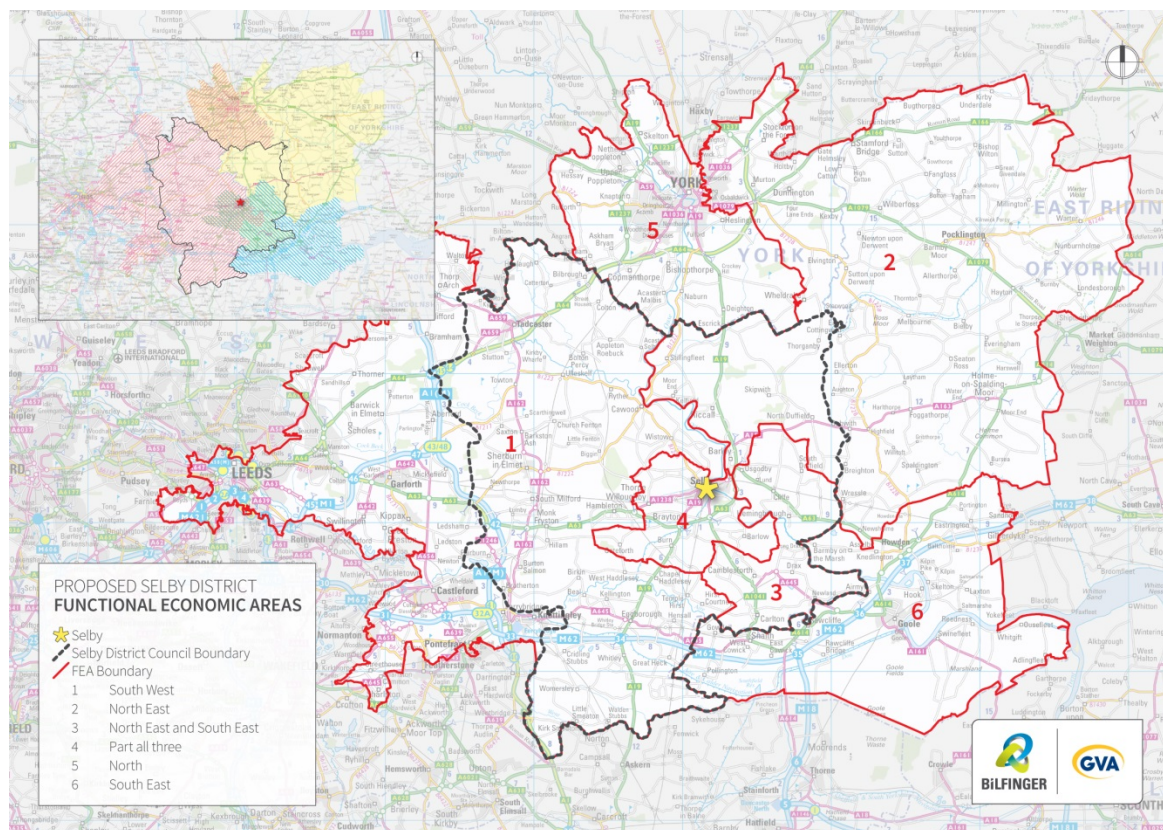
2.337 It has also been necessary to sense check this plan and consider how the boundaries sit in relation to the land supply. We have, however, made one adjustment to enable the inclusion of Olympia Park in the central FEA area, where all of the three FEAs overlap, as

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the site looks towards Selby town as an urban extension, rather than to the surrounding rural areas.

2.338 The result is the plan shown in Figure 2.29 below. This is included in a full page format in Appendix 1.

Figure 2.29: FEA boundaries



2.339 This defines 6 separate FEA areas, 2 of which do not encroach into the Selby District boundary. The FEA areas which do lie within the Selby boundary are:

- FEA1 – South West only;
- FEA2 – North East only;
- FEA3 – North East and South East;
- FEA4 – Part all three.

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2.340 As part of our Duty to Cooperate discussions with the neighbouring local authorities we sought to test these FEAs. The contacts, including representatives from Doncaster, East Riding and Wakefield largely concurred with the boundaries shown. Specific comments made included:

- Relationships between East Riding and Selby are strongest between Selby and Goole, and less strong to the north where they look towards York;
- The relationships between Selby and Doncaster and Selby and Wakefield could possibly be shown as stronger through the extension of FEA boundaries.

2.341 Based on the EDS, the Duty to Cooperate feedback, and the commercial market engagement work, on balance we consider that the FEAs defined by the EDS, with a tweak in relation to Olympia Park, are a fair and useful representation of the way that the Selby District economy operates. No further amendments are proposed.

2.342 We therefore summarise the key findings of this baseline chapter of the report in relation to each of these FEAs – 1 to 4.

#### FEA1 – South West only

- FEA1 covers the entire western half of Selby District. FEA1 is largely made up of the South West FEA in the EDS. The parts of the FEA that do not sit within the FEA1 boundary are the overlap with York (outside of Selby District’s boundary), and the overlap with Selby town (FEA4).
- FEA1 has links to the cities of Leeds, York and to Selby town, Wetherby, and towards the north of Wakefield.
- FEA1 includes the key localities of Sherburn-in-Elmet, junction 34 of the M62 (close to Kellingley Colliery and Eggborough), and Tadcaster.
- FEA1 benefits from significantly important road infrastructure, including a stretch of the M62 either side of junction 34; the A19 link from the M62 towards Selby town; the A1(M) linking to the M62 and the A63 into Selby town from junction 42; the A64 from Leeds to York via Tadcaster; and the A162 linking the A1(M) and M62 to Tadcaster via Sherburn-in-Elmet.

- FEA 1 also benefits from rail infrastructure linking to Gascoigne Wood and Kellingley Colliery; as well as the canal infrastructure that links to Kellingley.
- In terms of sectors, FEA1 includes 'Manufacturing/ Logistics' indicative growth zone of the EDS. These two sectors are already strongly represented at the employment sites within this zone including the breweries and Lambert Engineering in Tadcaster, as well as the major companies that have been attracted to Sherburn Enterprise Park and latterly Sherburn 2. The reclamation and redevelopment of the former Kellingley Colliery is also likely to be of significant interest to these sectors due to its potential multi-modal transport infrastructure and close proximity to the M62.
- FEA1 is also partly covered by the 'Energy' indicative growth zone in the south. Within FEA1 this covers Eggborough Power Station, and Kellingley.
- The 'Creative / Media' indicative growth zone stretches into FEA1 to reflect the cultural uses proposed at Church Fenton ('The Yorkshire Studios').
- The 'Agri-Tech/ Bio-renewables' indicative growth zone is less relevant to FEA1, only picking up the rural areas to the north east of the area. This does, however, include the Stockbridge Technology Centre.
- In terms of key employment sites identified in the EDS, those that are in FEA1 include Sherburn Enterprise Park and Sherburn 2 (identified as Existing Employment Sites), and Kellingley Colliery, Church Fenton Airfield, Gascoigne Wood / Interchange, and Wistow Mine (identified as Potential Employment Sites).
- Key locations recognised in the market as emerging sites in FEA1 include the Sherburn Proving Ground, Gascoigne Wood and Kellingley Colliery.
- Other localities within the FEA, including Eggborough and Tadcaster are also important locations for existing businesses (and with future growth potential).
- In FEA1, the Leeds City Region SEP supports 'Sherburn 2', adjacent to Sherburn Enterprise Park, on the border of Leeds and aligned to the growth aspirations set out for the east of the city; the redevelopment of Kellingley Colliery. The YNYER LEP SEP also supports Sherburn 2.



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## FEA2 – North East only

- FEA2 covers the north eastern corner of Selby District.
- FEA2 has links principally to the city of York, and to the towns of Selby and Pocklington (in the East Riding).
- FEA2 is a largely rural area that includes the settlements of Riccall, Barlby and North Duffield.
- FEA2 benefits from key road connections including the A19 between Selby and York, and the A163 linking Selby and Market Weighton.
- In terms of sectors, FEA2 is covered by the 'Agri-Tech/ Bio-renewables' indicative growth zone - a priority sector for the YNYER LEP, who have identified the potential for an 'agri-tech/energy' corridor along the A19 between York and Selby town in their SEP document.
- In terms of key employment sites identified in the EDS, FEA2 includes Riccall Mine (identified as an Existing Employment Site) and Stillingfleet Mine (identified as a Potential Employment Site).
- FEA2 also accommodates a number of business parks that play an important role in catering for local needs, including Blackwood Hall Business Park which provides flexible office & industrial units and offers business support functions, and Escrick Business Park, which provides valuable B1/B2/B8 space on the A19 corridor, catering for any latent demand that York is unable to accommodate.

## FEA3 – North East & South East

- FEA3 covers the eastern portion of Selby District and is an area of overlap between the Selby North East FEA and the Selby South East FEA.
- FEA3 has links principally to both the city of York, and to the towns of Selby and Pocklington (in the East Riding), and to Goole, Howden and Snaith (also in the East Riding).
- FEA3 is again a largely rural area as per FEA2 that includes the settlements of Cliffe, Hemingbrough, South Duffield and Drax.



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- FEA3 benefits from key road connections including the A63 between Selby and Howden (and on to Goole to the south of the M62), and the A1041 linking Selby and Snaith.
  - In terms of sectors, FEA2 is principally covered by the 'Energy' indicative growth zone, which includes Drax Power Station. The EDS identifies this sector as having the potential to link to key investments in the growing low-carbon and renewables sector in the Humber sub-region.
  - The northern boundary of FEA3 is covered by the 'Agri-Tech/ Bio-renewables' growth zone - a priority sector for the YNYER LEP, who have identified the potential for an 'agri-tech/energy' corridor along the A19 between York and Selby town in their SEP document.
  - In terms of key employment sites identified in the EDS, FEA3 includes Whitemoor Mine (identified as an Existing Employment Site).

#### FEA4 – Part all three

- FEA4 covers the centre of Selby District and reflects the zone where all of the three FEAs in the EDS intersect. It includes Selby town, as well as Brayton and Burn.
- As it sits at the intersection of all 3 EDS FEAs, FEA4 has links to all of the surrounding locations, including the cities of Leeds and York, Wetherby, towards the north of Wakefield, and to Goole, Howden and Pocklington.
- FEA4 benefits from being at the intersection of the major road routes around the district, including the A63 and the A19.
- FEA4 also benefits from rail infrastructure linking to the town, and to Olympia Park.
- In terms of sectors, FEA4 is partly covered by the 'Energy' indicative growth zone in the south.
- The 'Creative / Media' indicative growth zone stretches across FEA4 from Church Fenton in FEA1, to Olympia Park and Burn Airfield.
- The 'Agri-Tech/ Bio-renewables' indicative growth zone partly covers FEA4 in the north, and is a priority sector for the YNYER LEP, who have identified the potential for

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an 'agri-tech/energy' corridor along the A19 between York and Selby town in their SEP document. They state that Olympia Park has a role to play alongside other sites, however, resolving long-standing policy issues relating to planning permissions and the future use of these sites will be critical to take advantage of any potential development opportunities.

- In terms of key employment sites identified in the EDS, those that are in FEA4 include Olympia Park (identified as a Strategic Site – Local Plan) and Burn Airfield (identified as a Potential Employment Site).
- FEA4 is identified in the market review as playing a role in office provision in Selby town.
- Selby town also plays a key role in all types of existing employment provision, with recent developments being at Selby Business Park and Access 63, to name but a few important localities in FEA4.
- In FEA4, the Leeds City Region SEP and the YNYER SEP support Olympia Park as a key site for development.

2.343 One important final point to make is in relation to the former mine sites. The significant on site infrastructure connected to their previous uses (grid connection points etc.), and their well screened nature, could mean that they play a unique role in the district, catering for specific end users with heavier industrial or recycling / environmental industry links. The EDS also identifies that they could be appropriate for smaller businesses/business start-ups in the agri-tech and bio-renewables sectors. They will not be suited to the requirements of large manufacturing or logistics companies due to their inferior transport links.

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## 3. Employment land supply

### Identification of sites for assessment

3.1 The Council's PLAN Selby database has been the starting point for the identification of sites for consideration as part of the existing or potential future employment land supply in this ELR. It is understood that this database includes the following:

- Remaining allocations (in the Selby District Local Plan 2005 and the Selby District Core Strategy 2013);
- Windfall sites with extant planning permission;
- New sites put forward in the Council's 2013 Call for Sites and subsequently;
- Sites considered in the Council's 2015 SHLAA;
- Sites considered in the June 2015 Consultation Draft ELR;
- Sites identified in the Council's Economic Strategy Consultation Draft August 2016;
- Sites submitted in response to the Pool of Sites Consultation undertaken in October-November 2017; and
- Any other sites identified by the Council for consideration.

The Council provided GVA with a list of the sites in the PLAN Selby database that require assessment as part of this ELR. The sites identified include existing employment allocations, sites with the benefit of planning permission for employment uses, sites promoted for employment development through the Local Plan process, sites identified in the EDS, and sites identified by the Council as potential employment sites. These sites are listed in the spreadsheet in Appendix 2. An initial sift of these sites was then undertaken to remove any sites of less than 0.25ha (as recommended by PPG). Sites removed at this stage included SHER-B, SHER-C, SHER-D, SELB-AQ and SELB-K.

3.2 The resulting list of sites carried forward for detailed assessment within the ELR is set out in Appendix 2, sorted by FEA and site size (largest to smallest).

3.3 The mapping used to inform this ELR includes the following, which should be referred to in order to locate the sites assessed in this report:

- Selby Council – Pool of Sites Consultation Document – Appendix 2 Settlement Maps – 2017; and
- Selby Council – Additional Sites Consultation Document – Appendix 2 Settlement Maps – 2018

3.4 In addition, a number of additional / revised site boundaries have been provided by the Council. These are included in Appendix 3.

3.5 For clarity and ease of identification, the PLAN Selby site references have been used in this ELR, with these references superseding the unique identification reference numbers given to a number of the sites in the June 2015 Consultation ELR.

3.6 GVA has also added the following information to the core PLAN Selby database information, as set out in Appendix 2:

- Map book – this identifies the source of the mapping for the site assessed (PC = sites included in the ‘previous consultation’ on the Pool of Sites; AS = sites included in the Additional Sites consultation; and ‘Extra’ where the mappings included in Appendix 3 to this ELR); and
- FEA (1-4) – this sets out the FEA for each site as per the Consultation Draft Economic Strategy August 2016 (as amended in this ELR – as detailed above).

## Site assessment methodology

3.7 PPG states that an assessment of land availability should assess the **suitability** of sites for development and the likelihood of development coming forward (the **availability** and **achievability**).

3.8 It adds that assessing the suitability, availability and achievability of sites, including whether the site is economically viable, will provide the information on which the judgement can be made in the plan-making context as to whether a site can be considered deliverable over the plan period.

- 3.9 Specifically in relation to suitability, PPG states that the assessment should be guided by: the development plan, emerging plan policy and national policy; and market and industry requirements in that housing market or functional economic market area. It states that market signals will be useful in identifying the most appropriate use.
- 3.10 It goes on to state that assessment of suitability should include consideration of appropriateness and likely market attractiveness for the type of development proposed (alongside physical limitations, landscape impact, environmental / amenity impacts, and contribution to regeneration priority areas).
- 3.11 In relation to availability, PPG states that a site is considered available for development where there is confidence that there are no legal or ownership problems. PPG also states that consideration should also be given to the delivery record of the developers or landowners putting forward sites, and whether the planning background of a site shows a history of unimplemented permissions.
- 3.12 In terms of achievability, including whether a site is viable, PPG states that a site is considered achievable for development where there is a reasonable prospect that the particular type of development will be developed on the site at a particular point in time; and that this is essentially a judgement about the economic viability of the site, and the capacity of the developer to complete and let or sell the development over a certain period.
- 3.13 In terms of viability, PPG states that a site is viable if the value generated by its development exceeds the costs of developing it and also provides sufficient incentive for the land to come forward and the development to be undertaken.
- 3.14 In line with this guidance, GVA has developed a bespoke methodology for the detailed assessment of the listed sites. This methodology has been designed specifically to make use of, but not replicate, the wider PLAN Selby site assessment exercise, and to focus on market drivers and physical development constraints to identify good sites in good locations for employment development.
- 3.15 The criteria developed and used for the assessment of the sites are included in Appendix 4 of this report. A similar traffic light style approach has been taken for the site assessments to that used in the wider PLAN Selby site assessment exercise. The numerical
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scoring methodology utilised as part of the June 2015 Consultation Draft ELR has been superseded with this revised approach. The criteria include the following:

**Market attractiveness criteria:**

- Market activity – consideration of levels of market activity at the site / in the locality and the proximity to established business uses;
- Strategic accessibility – assessment of the site’s accessibility, based on PLAN Selby assessment criteria 2.4;
- Road frontage – consideration of the current availability of road frontage associated with the site;
- Adjacent uses – statement of adjacent / nearby uses;
- Amenity impact – consideration of the potential amenity issues / impacts likely to be associated with employment development at the site, based on PLAN Selby assessment criteria 2.24;
- Site is located in an Assisted Area – this identifies whether the site falls within an Assisted Area (2014 – 2020) – Assisted Areas are those locations where regional aid may be granted under EU legislation;
- Overall market attractiveness – based on all of the above market attractiveness criteria, an overall rating as to the market attractiveness of the site is identified (‘likely to be attractive’ – green; ‘may be attractive’ – yellow; and ‘unlikely to be attractive’ – red).

**Site constraints:**

- Physical / infrastructure constraints – consideration of such constraints, based on PLAN Selby assessment criteria 2.12;
- Physical point of access – consideration of achievability of access, based on PLAN Selby assessment criteria 2.23;
- Contamination – consideration of potential contamination, based on PLAN Selby assessment criteria 2.26;

- Significant development constraints – based on all of the above site constraints criteria, an overall rating as to the site constraints ('no significant development constraints' – green; 'potentially significant development constraints' – yellow; and 'significant development constraints' – red).

**Strategic support:**

- Consistency with Selby Economic Strategy / Core Strategy – identifying the status of the site in the Consultation Draft Economic Strategy August 2016;
- Consistency with the Leeds City Region SEP2 / York, North Yorkshire & East Riding SEP – identifying whether the site is identified as a strategic priority in each SEP.

**Potential occupiers:**

- Options for B uses – setting out the range of B class uses (at any scale) that could potentially be accommodated on the site (intended to be a wide range rather than a preferred end use);
- Optimum market segment – setting out the most suitable / appropriate market segment for the site, selecting from the list defined Appendix 5;
- Growth Zones in Selby Economic Strategy – identifying the growth zone into which the site falls, as defined in the Consultation Draft Economic Strategy August 2016;
- Scale of occupier – defining whether the site would most likely appeal to a local occupier (inside or outside of Selby) or an inward investor, or both.

**Availability & deliverability:**

- Availability considerations & impact of active use - consideration of availability and current use, based on PLAN Selby assessment criteria 3.1;
- Site viability and abnormal costs – consideration of developer activity, viability and costs, based on PLAN Selby assessment criteria 3.2;
- Likely economic viability – defining whether the development of the site is likely to be economically viable, based on the information gathered in the rest of the assessment

(‘likely to be economically viable’ – green; ‘may be economically viable’ – yellow; and ‘unlikely to be economically viable’ – red).

**SITE CONCLUSIONS:**

- Overall site conclusion - based on the rest of the assessment, a conclusion as to whether the site is considered to be appropriate for employment development (‘site considered to be appropriate for employment development’ – green; ‘site may be appropriate for employment development’ – yellow; and ‘site not considered appropriate for employment development’ – red);
- Option for allocation – based on the site conclusion whether it is considered that the site is an ‘option for allocation’ – blue; or if we ‘recommend it is not considered further’ – pink; sites with an overall site conclusion of green are generally recommended as an option for allocation, whereas sites with an overall site conclusion of yellow or red are not generally recommended as an option for allocation;
- Rationale – setting out the rationale for the option for allocation and any concluding remarks.

3.16 Appendix 2 includes the assessment undertaken for each site based on these criteria. Site visits were also made to the majority of sites in association with the preparation of the June 2015 Consultation Draft ELR.



## Sites summary

- 3.17 As set out above, in line with PPG guidance, all analysis of the existing / potential employment land supply has been undertaken based on the FEAs identified in this report (based on the Consultation Draft Economic Strategy August 2016 with a minor amendment to include Olympia Park in FEA4). Figure 3.1 below summarises the sites that make up the existing / potential employment land supply by FEA.
- 3.18 Overall, 78 sites have been assessed.

Figure 3.1: Sites summary by FEA

Type of development site	FEA1		FEA2		FEA3		FEA4		TOTAL	
	No. of sites	Area (ha)	No. of sites	Area (ha)	No. of sites	Area (ha)	No. of sites	Area (ha)	No. of sites	Area (ha)
EXISTING / POTENTIAL EMPLOYMENT LAND SUPPLY	46	1,259.48	6	81.53	7	57.95	19	392.08	78	1,791.04

## Employment Land Supply by FEA

- 3.19 The findings of the site assessment exercise for the 78 sites, by FEA, are set out below. The findings are presented in the same order as they are set out in Appendix 2.

### FEA1 – South West only

- 3.20 Within FEA 1, the largest FEA in Selby District, there are 46 sites in the existing / potential supply.
- 3.21 23 sites are identified as an ‘option for allocation’. These are summarised in the mini-proformas below, in size order. Where a site has the benefit of an existing allocation or is a windfall site, this is also noted.

1. FAIR-M, Land at Junction 42 of A1 (M) – 128.36ha

Overall market attractiveness	Significant development constraints	Likely economic viability	Site considered appropriate for employment development
Economic Strategy / Core Strategy / SEP status:		n/a	
Optimum Market Segment:		High Quality Business Park Warehouse & Distribution Park	
Growth Zone:		Manufacturing / Logistics	
Scale of occupier:		Both local occupier and inward investor	
Rationale:		Site is strategically well located, but may not be required alongside other large development sites in the FEA in relative proximity	

2. EGGB-R, Eggborough Power Station, Eggborough – 118.40ha

Overall market attractiveness	Significant development constraints	Likely economic viability	Site considered appropriate for employment development, resolution of technical constraints required
Economic Strategy / Core Strategy / SEP status:		n/a	
Optimum Market Segment:		High Quality Business Park Warehouse & Distribution Park Specialised Freight Terminal	
Growth Zone:		Energy	
Scale of occupier:		Both local occupier and inward investor	
Rationale:		Site is strategically well located, but may not be required alongside other large development sites in the FEA in relative proximity	

3. KLEY-B – Kellingley Colliery – 74.62ha – windfall site, resolution to grant planning permission, awaiting signing of s106

Overall market attractiveness	Significant development constraints	Likely economic viability	Site considered appropriate for employment development
Economic Strategy / Core Strategy / SEP status:		Identified as Potential Employment Site in ES Identified as a strategic priority in SEP	
Optimum Market Segment:		High Quality Business Park Warehouse & Distribution Park	
Growth Zone:		Manufacturing / Logistics Energy	
Scale of occupier:		Both local occupier and inward investor	
Rationale:		Site is in a strategic location and development would deliver significant regenerative benefits	

4. *SHER-AA – Gascoigne Wood Interchange (former Gascoigne Wood mine site), Sherburn In Elmet – 70.66ha*

Overall market attractiveness	Significant development constraints	Likely economic viability	Site considered appropriate for employment development but likely to be for specialist occupiers
Economic Strategy / Core Strategy / SEP status:		Identified as Potential Employment Site in ES	
Optimum Market Segment:		Specialised Freight Terminal Recycling/Environmental Industries Site	
Growth Zone:		Manufacturing / Logistics Energy	
Scale of occupier:		Both local occupier and inward investor	
Rationale:		Site has the potential to meet a specific type of occupier need	

5. *WHIT-Q – Land at Kellington Common – 60.16ha*

Overall market attractiveness	Significant development constraints	Likely economic viability	Site considered appropriate for employment development - subject to landowner buy in
Economic Strategy / Core Strategy / SEP status:		n/a	
Optimum Market Segment:		High Quality Business Park Warehouse & Distribution Park	
Growth Zone:		Manufacturing / Logistics Energy	
Scale of occupier:		Both local occupier and inward investor	
Rationale:		Site is in a strategic motorway corridor location - would require consideration alongside neighbouring sites; subject to landowner buy-in	

6. *WHIT-P – Land adjacent to Beal Lane/M62 – 40.20ha*

Overall market attractiveness	Significant development constraints	Likely economic viability	Site considered appropriate for employment development - subject to landowner buy in
Economic Strategy / Core Strategy / SEP status:		n/a	
Optimum Market Segment:		High Quality Business Park Warehouse & Distribution Park	
Growth Zone:		Manufacturing / Logistics Energy	
Scale of occupier:		Both local occupier and inward investor	
Rationale:		Site is in a strategic motorway corridor location - would require consideration alongside neighbouring sites; subject to landowner buy-in	

7. *SHER-P – Land at Lennerton Lane, Sherburn-in-Elmet (also known as Sherburn 2 and the Proving Ground) – 34.90ha – windfall site ELR 2015*

Overall market attractiveness	Significant development constraints	Likely economic viability	Site considered appropriate for employment development
Economic Strategy / Core Strategy / SEP status:		Identified as Existing Employment Site in ES Identified as a strategic priority in SEP	
Optimum Market Segment:		Warehouse & Distribution Park	
Growth Zone:		Manufacturing / Logistics	
Scale of occupier:		Both local occupier and inward investor	
Rationale:		Windfall site with clear market activity. Also likely to continue to meet needs beyond the Plan Period	

8. *WHIT-O – Land adjacent to Cobcroft Lane/M62 – 29.70ha*

Overall market attractiveness	Significant development constraints	Likely economic viability	Site considered appropriate for employment development - subject to landowner buy in
Economic Strategy / Core Strategy / SEP status:		n/a	
Optimum Market Segment:		High Quality Business Park Warehouse & Distribution Park	
Growth Zone:		Manufacturing / Logistics Energy	
Scale of occupier:		Both local occupier and inward investor	
Rationale:		Site is in a strategic motorway corridor location - would require consideration alongside neighbouring sites; subject to landowner buy-in	

9. *SHER-AM – Land east of A162, Sherburn In Elmet – 22.90ha*

Overall market attractiveness	Significant development constraints	Likely economic viability	Site considered appropriate for employment development
Economic Strategy / Core Strategy / SEP status:		n/a	
Optimum Market Segment:		Warehouse & Distribution Park	
Growth Zone:		Manufacturing / Logistics	
Scale of occupier:		Both local occupier and inward investor	
Rationale:		Site is in a good strategic location and would expand the employment land offer in Sherburn	

10. SMIL-P – Land East of A1(M)/A63 Junction, South Milford – 16.95ha

Overall market attractiveness	Significant development constraints	Likely economic viability	Site considered appropriate for employment development
Economic Strategy / Core Strategy / SEP status:		n/a	
Optimum Market Segment:		High Quality Business Park Warehouse & Distribution Park	
Growth Zone:		Manufacturing / Logistics	
Scale of occupier:		Both local occupier and inward investor	
Rationale:		Site is strategically well located, but may not be required alongside other large development sites in the FEA in relative proximity	

11. HENS-F – Land West of Springfield Farm, Weeland Road, Hensall – 13.50ha

Overall market attractiveness	Significant development constraints	Likely economic viability	Site considered appropriate for employment development
Economic Strategy / Core Strategy / SEP status:		n/a	
Optimum Market Segment:		General Industrial / Business	
Growth Zone:		Energy	
Scale of occupier:		Both local occupier and inward investor	
Rationale:		Site is well located in proximity to existing employment uses	

12. WHIT-K – Land at rear of George and Dragon, Whitley – 10.90ha

Overall market attractiveness	Significant development constraints	Likely economic viability	Site considered appropriate for employment development
Economic Strategy / Core Strategy / SEP status:		n/a	
Optimum Market Segment:		General Industrial / Business	
Growth Zone:		Energy	
Scale of occupier:		Both local occupier and inward investor	
Rationale:		Site is strategically well located; however, would need to ensure amenity of residents is protected	

13. TADC-Q – Land adjoining A64/A659, East Tadcaster – 7.22ha

Overall market attractiveness	Significant development constraints	Likely economic viability	Site considered appropriate for employment development - subject to landowner buy in
Economic Strategy / Core Strategy / SEP status:		n/a	
Optimum Market Segment:		High Quality Business Park Warehouse & Distribution Park	
Growth Zone:		Manufacturing / Logistics	
Scale of occupier:		Both local occupier and inward investor	
Rationale:		Site is in a good strategic location and would provide a new employment offer in Tadcaster next to existing employment development; subject to landowner buy-in	

14. HENS-G – Land North of Weeland Road, Hensall – 6.57ha

Overall market attractiveness	Significant development constraints	Likely economic viability	Site considered appropriate for employment development
Economic Strategy / Core Strategy / SEP status:		n/a	
Optimum Market Segment:		General Industrial / Business	
Growth Zone:		Energy	
Scale of occupier:		Local occupier	
Rationale:		Site is adjacent to existing employment uses - potential opportunity for further development to meet local needs	

15. TADC-Y – Land adjacent to Grimston Grange Offices, Grimston Park Estate, Tadcaster – 6.56ha

Overall market attractiveness	Significant development constraints	Likely economic viability	Site considered appropriate for employment development
Economic Strategy / Core Strategy / SEP status:		n/a	
Optimum Market Segment:		Office Location High Quality Business Park	
Growth Zone:		Manufacturing / Logistics	
Scale of occupier:		Both local occupier and inward investor	
Rationale:		Site is adjacent to existing employment uses - potential opportunity for further development to expand offer close to strategic road network (albeit strong signage would be required)	

16. EGGB-K – Land at Tranmore Lane, Eggborough – 5.32ha

Overall market attractiveness	Significant development constraints	Likely economic viability	Site considered appropriate for employment development
Economic Strategy / Core Strategy / SEP status:		n/a	
Optimum Market Segment:		General Industrial / Business	
Growth Zone:		Energy	
Scale of occupier:		Both local occupier and inward investor	
Rationale:		Site is in a relatively good strategic location and would expand the employment land offer at Eggborough	

17. TADC-W – Land west of St Joseph Street – 2.42ha

Overall market attractiveness	Significant development constraints	Likely economic viability	Site considered appropriate for employment development
Economic Strategy / Core Strategy / SEP status:		n/a	
Optimum Market Segment:		Office Location General Industrial / Business	
Growth Zone:		Manufacturing / Logistics	
Scale of occupier:		Local occupier	
Rationale:		Site is strategically well located; however, would need to ensure amenity of residents is protected and deliverability	

18. BILB-C – Land at Bilbrough Top adj A64, Bilbrough – 2.21ha

Overall market attractiveness	Significant development constraints	Likely economic viability	Site considered appropriate for employment development
Economic Strategy / Core Strategy / SEP status:		n/a	
Optimum Market Segment:		General Industrial / Business	
Growth Zone:		Manufacturing / Logistics	
Scale of occupier:		Both local occupier and inward investor	
Rationale:		Site is in a good strategic location albeit relatively isolated from a main centre / other employment uses	

19. TADC-X – Willow Farm, Doncaster Road, Tadcaster – 1.93ha

Overall market attractiveness	Significant development constraints	Likely economic viability	Site considered appropriate for employment development
Economic Strategy / Core Strategy / SEP status:		n/a	
Optimum Market Segment:		High Quality Business Park Warehouse & Distribution Park	
Growth Zone:		Manufacturing / Logistics	
Scale of occupier:		Both local occupier and inward investor	
Rationale:		Site is well located in relation to strategic road network and would provide a new employment offer in Tadcaster; but appears to be reserved for the use of owner so may not be general employment land	

20. EGGB-P – Selby Road (north), Eggborough (also known as North Point Business Park) – 1.65ha – Existing allocation

Overall market attractiveness	Significant development constraints	Likely economic viability	Site considered appropriate for employment development
Economic Strategy / Core Strategy / SEP status:		n/a	
Optimum Market Segment:		General Industrial / Business	
Growth Zone:		Energy	
Scale of occupier:		Local occupier	
Rationale:		Site could cater a local occupier for general industrial use	

21. TADC-AB – Land East of A162, Tadcaster – 1.29ha

Overall market attractiveness	Significant development constraints	Likely economic viability	Site considered appropriate for employment development
Economic Strategy / Core Strategy / SEP status:		n/a	
Optimum Market Segment:		High Quality Business Park Warehouse & Distribution Park	
Growth Zone:		Manufacturing / Logistics	
Scale of occupier:		Both local occupier and inward investor	
Rationale:		Site is well located in relation to strategic road network and would provide a new employment offer in Tadcaster; but appears to be reserved for the use of owner so may not be general employment land	



### 22. WHIT-R – Land East of Selby Road, Whitley – 1.19ha

Overall market attractiveness	Significant development constraints	Likely economic viability	Site considered appropriate for employment development
Economic Strategy / Core Strategy / SEP status:		n/a	
Optimum Market Segment:		High Quality Business Park Warehouse & Distribution Park	
Growth Zone:		Energy	
Scale of occupier:		Both local occupier and inward investor	
Rationale:		Site is well located for the strategic motorway network, however clarity is required on access; as the development would be for the owner - a site specific occupier, an allocation may be considered not necessary	

### 23. TADC-H – Chapel Street Car Park – 0.57ha

Overall market attractiveness	Significant development constraints	Likely economic viability	Site considered appropriate for employment development
Economic Strategy / Core Strategy / SEP status:		n/a	
Optimum Market Segment:		Office Location General Industrial / Business	
Growth Zone:		Manufacturing / Logistics	
Scale of occupier:		Local occupier	
Rationale:		Site is centrally located; however, would need consideration of deliverability	

3.22 23 sites in FEA1 were identified as ‘**recommend not considered further**’. The rationale for our recommendation on each site is provided in Appendix 2. Of these sites, 5 were identified as sites for specific occupiers, and therefore not recommended as options for allocation. These sites are:

- EGGB-Q (Saint Gobain / Celotex, Eggborough – 29.10ha);
- EGGB-N (Euro Auctions Ltd, Roall Lane, Kellington – 28.80ha) (**windfall site ELR 2015**);
- SHER-AJ (Enterprise Park, Sherburn In Elmet – 1.30ha) (**existing allocation**);
- EGGB-O (Northside Industrial Estate, Selby Road, Eggborough – 0.74ha); and
- HECK-C (Brocklesby, Unit 1, Long Lane, Great Heck – 0.5ha) (**windfall site ELR 2015**).

3.23 In terms of existing allocations / windfall sites, the following were subject to a ‘recommend not considered further’ conclusion:

- TADC-M (London Road, Tadcaster – 8.97ha) (**existing allocation**).

FEA2 – North East only

3.24 Within FEA 2, there are 6 sites in the existing / potential supply.

3.25 3 sites are identified as an ‘option for allocation’. These are summarised in the mini-proformas below, in size order.

1. *RICC-H – Riccall Business Park, Selby Road, Riccall – 42.00ha*

Overall market attractiveness	Significant development constraints	Likely economic viability	Site considered appropriate for employment development - may attract specialist occupiers
Economic Strategy / Core Strategy / SEP status:		Identified as Existing Employment Site in ES	
Optimum Market Segment:		Heavy/Specialist Industrial Site Recycling/Environmental Industries Site	
Growth Zone:		Agri-Tech / Bio-renewables	
Scale of occupier:		Both local occupier and inward investor	
Rationale:		Site has the potential to meet a specific type of occupier need, but also has the benefit of proximity to the strategic road network	

2. *RICC-C – Land east of York Road, Riccall – 3.24ha*

Overall market attractiveness	Significant development constraints	Likely economic viability	Site considered appropriate for employment development
Economic Strategy / Core Strategy / SEP status:		n/a	
Optimum Market Segment:		General Industrial / Business	
Growth Zone:		Agri-Tech / Bio-renewables	
Scale of occupier:		Local occupier	
Rationale:		Site is well located close to strategic road network, however, may not be required alongside RICC-H and ESCK-C	

3. *ESCK-C – Land west of Escrick Business Park, Escrick – 3.15ha*

Overall market attractiveness	Significant development constraints	Likely economic viability	Site considered appropriate for employment development
Economic Strategy / Core Strategy / SEP status:		n/a	
Optimum Market Segment:		High Quality Business Park Warehouse & Distribution Park	
Growth Zone:		Agri-Tech / Bio-renewables	
Scale of occupier:		Both local occupier and inward investor	
Rationale:		Site is well located on strategic road network, proven track record with adjacent development	

3.26 3 sites in FEA2 were identified as ‘**recommend not considered further**’. The rationale for our recommendation on each site is provided in Appendix 2. Of these sites, none were identified as sites for specific occupiers.

FEA3 – North East & South East

3.27 Within FEA 3, there are 7 sites in the existing / potential supply.

3.28 4 of the sites are identified as an ‘option for allocation’. These are summarised in the mini-proformas below, in size order.

1. *CLIF-E – Whitemoor Business Park, Cliffe Common, Cliffe – 27.00ha*

Overall market attractiveness	Significant development constraints	Likely economic viability	Site considered appropriate for employment development - may attract specialist occupiers
Economic Strategy / Core Strategy / SEP status:		Identified as Existing Employment Site in ES	
Optimum Market Segment:		Heavy/Specialist Industrial Site Recycling/Environmental Industries Site	
Growth Zone:		Agri-Tech / Bio-renewables	
Scale of occupier:		Both local occupier and inward investor	
Rationale:		Site has the potential to meet a specific type of occupier need, but also has the benefit of proximity to the strategic road network	

2. *BARL-E - Magazine Farm, Selby Bypass, Barlby – 14.54ha*

Overall market attractiveness	Significant development constraints	Likely economic viability	Site considered appropriate for employment development - well located, but may not be required alongside land available at Olympia Park
Economic Strategy / Core Strategy / SEP status:		n/a	
Optimum Market Segment:		High Quality Business Park Warehouse & Distribution Park	
Growth Zone:		Agri-Tech / Bio-renewables	
Scale of occupier:		Both local occupier and inward investor	
Rationale:		Well located site but unlikely to be needed alongside Olympia Park, and subject to potentially significant constraints	

3. *HEMB-U- The Old Brickworks, Hemingbrough – 1.63ha*

Overall market attractiveness	Significant development constraints	Likely economic viability	Site considered appropriate for employment development subject to resolution of landowner intentions / future of existing business
Economic Strategy / Core Strategy / SEP status:		n/a	
Optimum Market Segment:		General Industrial / Business	
Growth Zone:		Agri-Tech / Bio-renewables	
Scale of occupier:		Local occupier	
Rationale:		Site is located off the strategic road network; landowner intentions / future of existing business require resolution	

4. *HEMB-Y – The Coach Station, Hull Road, Hemingbrough – 1.62ha*

Overall market attractiveness	Significant development constraints	Likely economic viability	Willing land owner	Site considered appropriate for employment development subject to resolution of landowner intentions / future of existing business
Economic Strategy / Core Strategy / SEP status:		n/a		
Optimum Market Segment:		General Industrial / Business		
Growth Zone:		Agri-Tech / Bio-renewables		
Scale of occupier:		Local occupier		
Rationale:		Site is located off the strategic road network; landowner intentions / future of existing business require resolution		

3.29 3 sites in FEA3 were identified as ‘**recommend not considered further**’. The rationale for our recommendation on each site is provided in Appendix 2. Of these sites, 2 were identified as sites for specific occupiers, and therefore not recommended as options for allocation. These sites are:

- CLIF-M (Cliffe Common, Cliffe – 2.11ha) (**existing allocation**); and
- HEMB-T (Andy's Motor Spares, Hull Road, Hemingbrough – 0.55ha) (**windfall site ELR 2015**).

FEA4 – Part all three

3.30 Within FEA 4, which covers Selby town and its hinterland, there are 19 sites in the existing / potential supply (SELB-AB has been classed as falling in FEA 4 as it is located on the FEA boundary and is contiguous with the urban area).

3.31 14 sites are identified as an ‘option for allocation’. These are summarised in the mini-proformas below, in size order. Where a site has the benefit of an existing allocation or is a windfall site, this is also noted.

1. *SELB-CA – Olympia Park – 91.21ha - Existing allocation*

Overall market attractiveness	Significant development constraints	Likely economic viability	Site considered appropriate for employment development
Economic Strategy / Core Strategy / SEP status:		Identified as Strategic Site (Local Plan) in ES Identified as Strategic Site in the Core Strategy Identified as a strategic priority in SEP	
Optimum Market Segment:		High Quality Business Park Warehouse & Distribution Park	
Growth Zone:		Agri-Tech / Bio-renewables Creative / Media	
Scale of occupier:		Both local occupier and inward investor	
Rationale:		Site is strategically well located and a priority project for the Council and wider sub-region	

2. *BRAY-S – Land south of Mill Lane, Brayton – 13.29ha*

Overall market attractiveness	Significant development constraints	Likely economic viability	Site considered appropriate for employment development subject to resolution of landowner intentions
Economic Strategy / Core Strategy / SEP status:		n/a	
Optimum Market Segment:		High Quality Business Park Warehouse & Distribution Park	
Growth Zone:		Creative / Media Energy	
Scale of occupier:		Both local occupier and inward investor	
Rationale:		Site is strategically well located, but may not be required alongside SELB-CA; landowner intentions unknown	

3. *BRAY-T – Land north east of A63 Bypass / A19 Junction, Brayton – 6.84ha*

Overall market attractiveness	Significant development constraints	Likely economic viability	Site considered appropriate for employment development subject to resolution of landowner intentions
Economic Strategy / Core Strategy / SEP status:		n/a	
Optimum Market Segment:		High Quality Business Park Warehouse & Distribution Park	
Growth Zone:		Creative / Media Energy	
Scale of occupier:		Both local occupier and inward investor	
Rationale:		Site is strategically well located, but may not be required alongside SELB-CA; landowner intentions unknown	

4. *BURN-A – Burn Grange Farm, Doncaster Road, Burn – 6.17ha*

Overall market attractiveness	Significant development constraints	Likely economic viability	Site considered appropriate for employment development
Economic Strategy / Core Strategy / SEP status:		n/a	
Optimum Market Segment:		High Quality Business Park Warehouse & Distribution Park	
Growth Zone:		Creative / Media Energy	
Scale of occupier:		Both local occupier and inward investor	
Rationale:		Site is strategically well located, but may not be required alongside SELB-CA	

5. *SELB-BX – Land to West of Selby Business Park, Selby – 1.99ha*

Overall market attractiveness	Significant development constraints	Likely economic viability	Site considered appropriate for employment development
Economic Strategy / Core Strategy / SEP status:		n/a	
Optimum Market Segment:		General Industrial / Business	
Growth Zone:		Creative / Media Energy	
Scale of occupier:		Both local occupier and inward investor	
Rationale:		Site adjacent to Selby Business Park; suitability subject to constraints and may not be needed alongside SELB-AD and SELB-BU; landowner intentions require confirmation	

6. SELB-BW – Land at Access 63, East Common Lane, Selby – 1.89ha – Existing allocation

Overall market attractiveness	Significant development constraints	Likely economic viability	Site considered appropriate for employment development
Economic Strategy / Core Strategy / SEP status:		n/a	
Optimum Market Segment:		General Industrial / Business	
Growth Zone:		Agri-Tech / Bio-renewables Energy	
Scale of occupier:		Both local occupier and inward investor	
Rationale:		Site part of Access 63 Business Park - considered appropriate for employment uses - unclear as to status of planning permission or why this frontage plot hasn't been delivered earlier	

7. SELB-AD – Land to West of Selby Business Park, Selby – 1.75ha – Existing allocation

Overall market attractiveness	Significant development constraints	Likely economic viability	Site considered appropriate for employment development
Economic Strategy / Core Strategy / SEP status:		n/a	
Optimum Market Segment:		General Industrial / Business	
Growth Zone:		Creative / Media Energy	
Scale of occupier:		Both local occupier and inward investor	
Rationale:		Site adjacent to Selby Business Park and separate road frontage as well - considered appropriate for employment uses; albeit landowner intentions require clarification	

8. BRAY-Y – Land south west of A63/A19 roundabout, Brayton – 1.13ha

Overall market attractiveness	Significant development constraints	Likely economic viability	Site considered appropriate for employment development - potential access issues but it is assumed that the developer has concluded that this is achievable
Economic Strategy / Core Strategy / SEP status:		n/a	
Optimum Market Segment:		General Industrial / Business	
Growth Zone:		Creative / Media Energy	
Scale of occupier:		Local occupier	
Rationale:		Site is strategically well located, but may not be required alongside SELB-CA; suitability of access arrangements requires confirmation	

9. SELB-BU – Land South of Oakney Wood Drive – 0.75ha – Existing allocation

Overall market attractiveness	Significant development constraints	Likely economic viability	Site considered appropriate for employment development
Economic Strategy / Core Strategy / SEP status:		n/a	
Optimum Market Segment:		General Industrial / Business	
Growth Zone:		Creative / Media Energy	
Scale of occupier:		Both local occupier and inward investor	
Rationale:		Site adjacent to Selby Business Park and extant employment permission - considered appropriate for employment uses - clarification required if in use as open storage	

10. SELB-S – Back Micklegate Car Park, Selby – 0.68ha

Overall market attractiveness	Significant development constraints	Likely economic viability	Site considered appropriate for employment development
Economic Strategy / Core Strategy / SEP status:		n/a	
Optimum Market Segment:		Office Location	
Growth Zone:		Agri-Tech / Bio-renewables Creative / Media	
Scale of occupier:		Local occupier	
Rationale:		Site could cater for town centre employment uses	

11. SELB-BC – Former Gas Holders, Prospect Way, Selby – 0.63ha

Overall market attractiveness	Significant development constraints	Likely economic viability	Site considered appropriate for employment development, resolution of technical constraints required
Economic Strategy / Core Strategy / SEP status:		n/a	
Optimum Market Segment:		General Industrial / Business	
Growth Zone:		Agri-Tech / Bio-renewables Creative / Media Energy	
Scale of occupier:		Local occupier	
Rationale:		Site is in established employment area; could meet a local occupier need; albeit resolution of technical considerations is required	



12. SELB-AB – Council Depot, Barlby Road, Barlby – 0.58ha

Overall market attractiveness	Significant development constraints	Likely economic viability	Site considered appropriate for employment development, resolution of technical constraints required
Economic Strategy / Core Strategy / SEP status:		n/a	
Optimum Market Segment:		General Industrial / Business	
Growth Zone:		Agri-Tech / Bio-renewables Creative / Media	
Scale of occupier:		Local occupier	
Rationale:		Site is strategically well located and in proximity to Olympia Park; could meet a local occupier need; albeit resolution of technical considerations is required	

13. SELB-M – Land North of Portholme Road, Selby – 0.47ha

Overall market attractiveness	Significant development constraints	Likely economic viability	Site considered appropriate for employment development
Economic Strategy / Core Strategy / SEP status:		n/a	
Optimum Market Segment:		Office Location	
Growth Zone:		Agri-Tech / Bio-renewables Creative / Media Energy	
Scale of occupier:		Local occupier	
Rationale:		Site could cater for town centre employment uses	

14. SELB-BA – Vivars Way, Canal Road, Selby – 0.41ha

Overall market attractiveness	Significant development constraints	Likely economic viability	Site considered appropriate for employment development
Economic Strategy / Core Strategy / SEP status:		n/a	
Optimum Market Segment:		General Industrial / Business	
Growth Zone:		Agri-Tech / Bio-renewables Creative / Media	
Scale of occupier:		Local occupier	
Rationale:		Site could cater a local occupier for general industrial use	

3.32 5 sites in FEA4 were identified as ‘**recommend not considered further**’. The rationale for our recommendation on each site is provided in Appendix 2. Of these sites, none were identified as sites for specific occupiers.

3.33 In terms of existing allocations / windfall sites, the following were subject to a ‘recommend not considered further’ conclusion:

- SELB-AW (East of Bawtry Road, Selby – 1.95ha) (**existing allocation**); and
- SELB-AR (Council waste depot at the end of Prospect Way – 0.64ha) (**windfall site ELR 2015**).

## 4. Projecting the demand for employment land

- 4.1 The National Planning Policy Framework (NPPF) states that in the context of a presumption in favour of sustainable development, local planning authorities should “positively seek opportunities to meet the development needs of their area” and that Local Plans should meet objectively assessed needs with sufficient flexibility to adapt to rapid change.
- 4.2 Planning Practice Guidance (PPG) states that, in the context of economic development, the primary objective of identifying need is to:
- identify the future quantity of land or floorspace required for economic development uses including both the quantitative and qualitative needs for new development; and
  - provide a breakdown of that analysis in terms of quality and location, and to provide an indication of gaps in current land supply.
- 4.3 It goes on to state that the quantity of economic development floorspace needed should be based on quantitative assessments alongside an understanding of the qualitative requirements of each market segment. In this context the assessment of need should be proportionate and be based on future scenarios that could reasonably be expected to occur.
- 4.4 In forecasting future requirements, PPG recommends that plan makers consider:
- sectoral and employment forecasts and projections (labour demand);
  - demographically derived assessments of future employment needs (labour supply techniques);
  - analyses based on the past take-up of employment land and property and/or future property market requirements;
  - consultation with relevant organisations, studies of business trends, and monitoring of business, economic and employment statistics.

4.5 In order to comply with the requirements of national guidance we have considered the following when calculating the potential employment land demand and requirements to the end of the plan period:

- Historic employment land take up rates – based on data recorded by the Council relating to the take-up of land across allocated employment sites for employment uses
- Historic change in commercial floorspace – based on data reported by the Valuation Office Agency (VOA) for the period 2000 to 2012 (the latest data available)
- Labour demand modelling – drawing on the Regional Econometric Model (REM), which is an Experian based forecast managed by the Regional Intelligence Unit within Leeds City Council
- Labour demand modelling (alternative scenarios) – drawing on forecasting data obtained from both Oxford Econometrics and Cambridge Econometrics forecasting houses

### Historic take-up rates

4.6 The historic take-up of land is considered as the first model to assess potential future requirements for employment land across Selby.

4.7 Take-up on allocated employment sites is recorded by the Selby District Council Planning Team, including areas developed in annual monitoring periods. Comparing the latest data on developable area remaining on allocated sites (2014/15) with the site area in 2005 (the start of the period) allows analysis of average take-up over an eleven year period.

4.8 It should be noted that this analysis relates only to allocated employment sites and therefore does not include windfall developments over the period considered.

4.9 The following table presents this data, broken down by area as recorded by Selby DC (which aligns with the FEAs identified previously within this report).

Figure 4.1: Annual average take-up rates (Ha) by area

Functional Economic Area (FEA)	Take Up 2005 - 2015 (Ha)	Annual Average 2005 - 2015 (Ha)
1: South West only	8.33	0.833
2: North East only	0	0
3: North East & South East	0.6	0.06
4: Part all three	25.17	2.517
<b>Total</b>	<b>34.1</b>	<b>3.41</b>

Source: Adapted from Selby DC take-up rate data (2016)

- 4.10 If this annual average was projected forward for the 11 period between 2016 and 2027 this would create a requirement for just over 37.5ha of employment land across Selby. Figure 4.2 below breaks this down by area, although it should be noted that this is a simple extrapolation of past trends rather than indication of market requirements / demand.

Figure 4.2: Projected annual average take-up rates (Ha) by area

Functional Economic Area (FEA)	Annual Take Up 2016 - 2027 (Ha)
1: South West only	9.163
2: North East only	0
3: North East & South East	0.66
4: Part all three	27.687
<b>Total</b>	<b>37.51</b>

Source: Adapted from Selby DC take-up rate data (2016)

- 4.11 Of specific note within this analysis, the NE FEA is noted to have seen no take up of allocated employment land, and therefore is projected to have no employment land requirements based on historic take-up rates.
- 4.12 To interrogate this evidence further we have undertaken analysis of the distribution of businesses across Selby and these market areas in particular – with reference to the key sectors identified within the econometric data analysis.
- 4.13 Business data, which is geo-referenced, has been obtained from the Inter-Departmental Business Register (IDBR), for Selby. Businesses which are identified by Standard Industrial Classification (SIC) code (4-digit) have been mapped. The plan in Appendix 6 shows the distribution of businesses within the following identified key sectors.

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4.14 Analysis of Experian Business Strategies (EBS) econometric data over two historic time periods (1997 – 2013, and 2008 – 2013) (long and short term historic trends) has identified a number of ‘key sectors’ for Selby – being those that have contributed both employment and Gross Value Added growth. These are sectors that have therefore effectively performed well locally, and ones that we would expect would make a contribution to the future growth of the Selby economy. These sectors include the following (those in bold are those within which EBS also suggest forecast growth within the baseline econometric modelling over the period 2013 – 2026):

- Food, drink and tobacco
- Wood and paper
- Non metallic products
- Other manufacturing
- **Civil engineering**
- **Professional services**
- **Land transport, storage and post**

4.15 It is clear on the basis of the plan that there is a relative balance of distribution of these businesses across Selby.

4.16 The IDBR data identifies a total of 2578 businesses which can be geo-referenced (and therefore mapped). There are additional businesses identified but which cannot be geo-referenced due to incomplete dataset. Of these 2578 businesses the following geographical distribution is identified (applying the market areas identified within the ELR):

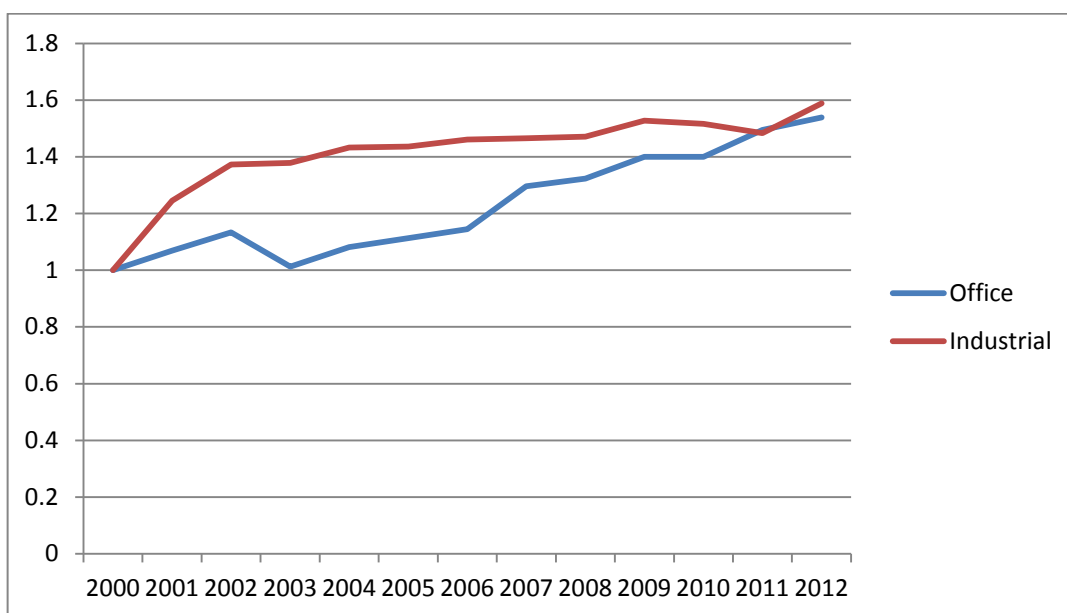
- FEA 1 South West 1405 businesses, 55% of the total georeferenced businesses
- FEA 2 North East 242 businesses, 9.39% of the total georeferenced businesses
- FEA 3 North East and South East 219 businesses, 8.5% of the total georeferenced businesses

- 
- FEA 4 Part all three 712 businesses, 27.6% of total georeferenced businesses
- 4.17 On this basis, one could conclude that FEA 1 represents over half of the Selby economy currently, and FEA 4 approximately a quarter of the economy. FEA 2 captures around 10% of the economy in terms of business base. On this basis it would therefore appear to be inappropriate to assume 0% of growth in this area.
- 4.18 Applying the broad split of economy as per the IDBR data would suggest the following approximate breakdown of take-up between 2005 and 2015:
- FEA 1 55% = 18.76ha
  - FEA 2 9% = 3.07ha
  - FEA 3 8% = 2.73ha
  - FEA 4 28% = 9.55ha
- 4.19 Applying these same split assumptions to the projected land requirements based on historic annual averages identifies the following by functional economic area:
- FEA 1 55% = 20.63ha
  - FEA 2 9% = 3.34ha
  - FEA 3 8% = 3ha
  - FEA 4 28% = 10.5ha

## Historic change in floorspace

- 4.20 Historic trend analysis can be carried out using Valuations Office Agency (VOA) Commercial and Industrial Floorspace Statistics, which includes data on change in floorspace (square metres) by office and industrial uses over the period 2002 to 2012.
- 4.21 This data, as illustrated in Figure 4.3, shows total office and industrial floorspace (rateable) in Selby between 2000 and 2012. The data is not available to a level below local authority.

Figure 4.3: Change in commercial and industrial floorspace in Selby



Source: Valuation Office Agency, 2014

4.22 The detail of trends in office and industrial floorspace are shown in Figure 4.4 below.

Figure 4.4: Selby commercial and industrial floorspace change 2000 – 2012

	Commercial and Industrial Floorspace (Sq m)				
	2000	2012	Change 2000 - 2012	% Change 2000 - 2012	Average change per annum
Office	29000	48000	19000	65.5%	1583
Industrial	505000	872000	367000	72.7%	30583

Source: Valuation Office Agency, 2014

4.23 The VOA figures show that:

- Selby has seen an increase in commercial floorspace over the period 2000 to 2012, with specific high rates of growth in office floorspace between the period 2006 – 2009, and for office between 2000 and 2002.
- Rates of growth in industrial floorspace have been higher over the period than office floorspace, but from a higher base position – i.e. from a more established position.

4.24 These trends can be projected forward to provide an estimation of the amount of office and industrial floorspace that may be required across Selby in the future. The average change in these floorspace figures over the last 12 years have been annualised and



projected forward to provide estimates on the quantity of commercial and industrial floorspace at the end of 2027.

4.25 These estimates are summarised in Figure 4.5 below.

*Figure 4.5: Projected floorspace change 2014 – 2027*

Commercial and Industrial Floorspace (Sq m)				
	2012	Average change per annum	Cumulative change 2014 – 2027	Projected floorspace 2027
Office	48000	1583	19500	67500
Industrial	872000	30583	211900	1083900

Source: Valuation Office Agency, 2014

4.26 These floorspace scenarios suggest that:

- If recent trends continue, Selby will continue to increase its portfolio of commercial office floorspace, with a further increase of 19,500sq.m between 2014 and 2027; and
- Industrial floorspace will also continue to increase, with a further 211,900sq.m to be delivered (or rateable), taking Selby to cover 1m sq.m of industrial floorspace by 2027.

## Labour demand modelling

### Background to economic projections and scenarios

4.27 Before the labour demand based employment land requirements across Selby for the plan period can be established, alternative scenarios setting out the potential nature and scale of economic growth forecast must be considered.

4.28 This section sets out the methodology underpinning the preparation of the labour demand based forecasting within the ELR culminating in the associated floorspace requirements. It provides a clear audit trail of the methods, assumptions and stages of work undertaken.

4.29 The consideration of a range of models to establish employment floorspace and land requirements is in line with the guidance, the NPPF, and the NPPG.

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4.30 Alongside the preparation of the ELR, consultants have been independently undertaking an objectively assessed need exercise for Selby District Council to determine the level of housing required over the plan period (the Strategic Housing Market Assessment). Information has been shared between both pieces of work to ensure a consistent approach by the Council in its preparation of PLAN Selby.

4.31 The methodology for the development of labour demand modelling is set out in the following steps:

- Source employment projections, by sector, over the plan period;
- Match sector groupings to land use categories; and
- Identify worker density assumptions for converting employment to floorspace and calculate floorspace requirements.

#### Step 1: Source employment projections

4.32 The latest iteration of the Regional Econometric Model (REM) available at the time of writing has been obtained from the Regional Economic Intelligence Unit (REIU) at Leeds City Council (obtained in January 2016). This data runs to 2031, projecting the change in Full Time Equivalent (FTE) jobs broken down into 38 sectors. It should be noted that the ELR period is considered to 2027, in line with the plan period.

4.33 The REM model has been re-based for the purposes of this ELR using the latest Business Register and Employment Survey (BRES) (formerly the Annual Business Inquiry, ABI) (total employment). The BRES is one of the most robust indicators of employment by sector at a detailed level of breakdown with data available to 4-digit SIC code. For the purposes of this analysis, the Selby economy has been considered at a 2-digit SIC code level, with recognition that this 2-digit analysis is ultimately built up from the 4-digit dataset. The latest BRES data available is dated 2014, and this is therefore taken as the base year within the ELR analysis.

4.34 The percentage change in employment from 2015 to 2027 forecast by 38 sectors within the REM model has been applied to the 2014 BRES base figures to give forecast change in current employment levels over the plan period. The REM and the BRES sectors have been aggregated to allow direct comparison, as summarised in Figure 4.6.

Figure 4.6: REM and BRES sector alignment

2 Digit SIC code sector definition	REM sector definition
55,56	Accommodation & Food Services
66,82	Administrative & Supportive Service Activities
01,02,03	Agriculture, Forestry & Fishing
50,51	Air & Water Transport
20	Chemicals
42	Civil Engineering
26	Computer & Electronic Products
62,63,95	Computing & Information Services
41	Construction of Buildings
85	Education
05,06,07,08,09	Extraction & Mining
64	Finance
10,11,12	Food, Drink & Tobacco
19	Fuel Refining
86	Health
65	Insurance & Pensions
49,52,53	Land Transport, Storage & Post
27,28,33	Machinery & Equipment
58,59,60	Media Activities
24,25	Metal Products
31,32	Other Manufacturing
78,79,80,81,94,96,97,98,99	Other Private Services
21	Pharmaceuticals
18	Printing and Reproduction of Recorded Media
69,70,71,72,73,74,75	Professional Services
84	Public Administration & Defence
68,77	Real Estate
90,91,92,93	Recreation
87,88	Residential Care & Social Work
47	Retail
22,23	Rubber, Plastic and Other Non-Metallic Mineral Products
43	Specialised Construction Activities
61	Telecoms
13,14	Textiles & Clothing

29,30	Transport Equipment
35,36,37,38,39	Utilities
45,46	Wholesale
16,17	Wood & Paper

4.35 The Baseline REM considered within the analysis, broken down by sector, comparing the 2014 base data with forecast employment in 2027 are presented in Figure 4.7.

Figure 4.7: Employment in Selby, 2014 to 2027

	2014 BRES	% Change to 2027 (REM) (2015-2027)	Projected REM based - 2027
Accommodation & Food Services	2,222	18.73%	2,638
Administrative & Supportive Service Activities	374	3.97%	389
Agriculture, Forestry & Fishing	115	-22.42%	89
Air & Water Transport	17	6.19%	18
Chemicals	8	-3.99%	8
Civil Engineering	239	12.79%	270
Computer & Electronic Products	4	-6.37%	4
Computing & Information Services	830	3.43%	858
Construction of Buildings	406	20.73%	490
Education	3,036	-1.05%	3,004
Extraction & Mining	753	-2.54%	734
Finance	151	7.65%	163
Food, Drink & Tobacco	2,749	13.47%	3,119
Fuel Refining	0	-0.37%	0
Health	726	8.47%	788
Insurance & Pensions	1	1.18%	1
Land Transport, Storage & Post	3,129	4.60%	3,273
Machinery & Equipment	1,545	-7.38%	1,431
Media Activities	19	6.85%	20
Metal Products	396	6.89%	423
Other Manufacturing	169	3.85%	176
Other Private Services	2,520	5.88%	2,668
Pharmaceuticals	2	49.61%	3
Printing and Reproduction of Recorded Media	19	-3.63%	18
Professional Services	2,212	7.45%	2,377
Public Administration & Defence	656	-8.34%	601
Real Estate	723	14.53%	828
Recreation	381	0.12%	381
Residential Care & Social Work	2,235	22.12%	2,729
Retail	2,300	-0.54%	2,288
Rubber, Plastic and Other Non-Metallic	668	5.29%	703

Mineral Prods			
Specialised Construction Activities	1,163	16.52%	1,355
Telecoms	27	-2%	27
Textiles & Clothing	53	-19.05%	43
Transport Equipment	414	-3.41%	400
Utilities	987	-4.36%	944
Wholesale	2,407	0.79%	2,426
Wood & Paper	346	-3.93%	332
<b>Total</b>	<b>34,002</b>		<b>36,020</b>

Source: ONS, REM, GVA analysis, 2015

4.36 The re-based REM suggests a potential growth of over 2,000 jobs over the period 2015 to 2027 (2,018).

4.37 Given the generally positive forecasts for Selby over the period to 2027, it is of interest to explore which particular sectors are contributing to this performance. Sectors of particular note are summarised below:

- Accommodation and food services, with a projected increase in employment of 416 jobs over the plan period;
- A split in Public sector activities including contraction in Education and Public Administration and Defence, but growth in Residential Care and Social Work, with a projected increase of 494 jobs over the plan period;
- Manufacturing, interestingly with forecast growth in some sub-sectors including Food, Drink and Tobacco (13.5%, 370 FTEs), Metal Products (6.9%, 27 FTEs), Rubber, Plastics and Non-Metallics (5.3%, 35 FTEs)
- Professional Services, Finance, Other Private Services and Administrative & Supportive Service Activities combined showing a projected increase of 339 jobs over the period.

## Step 2: Matching sectors to land use categories

4.38 Each of the sectors considered within the analysis must be considered in terms of the standard land use categories. This process of aligning the sectors with land use categories is necessary to reflect the fact that not all sectors have B Use Class land and property implications, and for those that do include some B Use Class employment they may not be 100% B Use Class.

4.39 The assumptions for each sector are summarised in Figure 4.8.

Figure 4.8: Land use employment assumptions

Sector	Business Use Classification	Proportion of employment sector occupying each Use Class		
		B1	B2	B8
Accommodation & Food Services	Non B	0.0%	0.0%	0.0%
Administrative & Supportive Service Activities	Primarily B1, Some A uses	65.0%	0.0%	0.0%
Agriculture, Forestry & Fishing	Non B	0.0%	0.0%	0.0%
Air & Water Transport	Primarily B8	0.0%	0.0%	65.0%
Chemicals	Primarily B2	0.0%	100.0%	0.0%
Civil Engineering	Primarily Non B	35.0%	0.0%	0.0%
Computer & Electronic Products	Primarily B2	0.0%	100.0%	0.0%
Computing & Information Services	Primarily B1, Some A uses	65.0%	0.0%	0.0%
Construction of Buildings	Self-employment - limited B2/B8 storage	0.0%	30.0%	5.0%
Education	Non B	0.0%	0.0%	0.0%
Extraction & Mining	Non B	0.0%	0.0%	0.0%
Finance	Primarily B1, Some A uses	65.0%	0.0%	0.0%
Food, Drink & Tobacco	Primarily B2	0.0%	100.0%	0.0%
Fuel Refining	Primarily B2	0.0%	100.0%	0.0%
Health	Non B	0.0%	0.0%	0.0%
Insurance & Pensions	Primarily B1, Some A uses	65.0%	0.0%	0.0%
Land Transport, Storage & Post	Primarily B8	0.0%	0.0%	65.0%
Machinery & Equipment	Primarily B2	0.0%	100.0%	0.0%
Media Activities	Primarily Non B	35.0%	0.0%	0.0%
Metal Products	Primarily B2	0.0%	100.0%	0.0%
Other Manufacturing	Primarily B2	0.0%	100.0%	0.0%
Other Private Services	Primarily Non B	35.0%	0.0%	0.0%
Pharmaceuticals	Primarily B2	0.0%	100.0%	0.0%
Printing and Reproduction of Recorded	Primarily B2	0.0%	100.0%	0.0%

Media				
Professional Services	Primarily B1, Some A uses	65.0%	0.0%	0.0%
Public Administration & Defence	Non B	0.0%	0.0%	0.0%
Real Estate	Primarily Non B	35.0%	0.0%	0.0%
Recreation	Non B	0.0%	0.0%	0.0%
Residential Care & Social Work	Primarily Non B	0.0%	0.0%	0.0%
Retail	Non B	0.0%	0.0%	0.0%
Rubber, Plastic and Other Non-Metallic Mineral Products	Primarily B2	0.0%	100.0%	0.0%
Specialised Construction Activities	Self-employment - limited B2/B8 storage	0.0%	30.0%	5.0%
Telecoms	Primarily B8	0.0%	0.0%	65.0%
Textiles & Clothing	Primarily B2	0.0%	100.0%	0.0%
Transport Equipment	Primarily B2	0.0%	100.0%	0.0%
Utilities	Non B	0.0%	0.0%	0.0%
Wholesale	Primarily B8	0.0%	15.0%	60.0%
Wood & Paper	Primarily B2	0.0%	100.0%	0.0%

Source: GVA, 2013

- 4.40 Figure 4.9 summarises the headline implications of projected change in employment by B Use Class under the re-based REM model.

*Figure 4.9: Projected change in employment, 2015 to 2027 by B Use Class*

	B1a/b	B1c/B2	B8	Total B Class
Baseline REM (Gross)	243	526	119	888
Baseline REM (Net)	243	373	119	735

Source: ONS, REM, GVA analysis, 2015

- 4.41 Under the re-based REM model there is a more modest increase in jobs forecast when the non B Use Class jobs are removed from the figures. Specifically, this reduces to a gross increase in B Use Class jobs of 888 compared to a previously identified total job growth forecast of 2,018. The bulk of these B Use Class jobs as forecast are identified to be B1c/B2, accounting for over 50% of the total gross B Class jobs forecast to 2027.



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### Step 3: Converting jobs to floorspace requirements

- 4.42 Employment densities are a key link between forecast employment change and ultimate requirements. Appropriate employment densities need to be applied to the projected change in B Class employment to convert these employment forecasts to floorspace requirements.
- 4.43 National average employment density figures are available from the Homes and Community Agency Employment Density Guide 3<sup>rd</sup> Edition (2015). However the guidance recognises the need to factor in local employment density assumptions where they can be evidenced (reference: para 5.39 to 5.40).
- 4.44 A study was undertaken by Roger Tym and Partners on behalf of Yorkshire Forward (Planning for Employment Land Translating Jobs into Land, 2010) to establish appropriate assumptions to be applied when planning for employment land in Yorkshire and the Humber, derived specifically from in-depth regional analysis. This ELR applies the up-to-date regionally specific employment density assumptions identified by the Roger Tym and Partners work, specifically:
- B1a/b: 16sq.m per FTE (general office assumption)
  - B1c, B2: 67sq.m per FTE; and
  - B8: 67sq.m per FTE.
- 4.45 It is recognised that there are factors impacting on future employment densities which may move towards lower overall densities or less reliance upon traditional forms of employment floorspace to meet economic needs. This study has not made adjustments for such changes because we believe it is better to use consistent and well understood regional estimates for long term forecasting whilst recognising that these should be monitored over the plan period.
- 4.46 The resulting estimates of floorspace requirements, resulting from the previously identified employment densities being applied to forecast B Use Class employment to 2027 (gross), are summarised in Figure 4.10 below.

Figure 4.10: Floorspace implications of labour demand model (gross), 2014 to 2027 (Sq.m)

	B1a/b	B1c/B2	B8	Total
Rebased REM	3880	35256	8005	47140

Source: ONS, REM, GVA analysis, 2014

## Step 4: Calculating land requirements

### Application of plot ratios

- 4.47 The amount of floorspace that is built per net hectare is an important factor to consider when calculating employment land requirements. We have used experience from undertaking ELRs and referred to the guidance to ascertain the average amount of floorspace being built per hectare. This enables floorspace requirements (sq.m) to be converted into estimates of employment land (ha).
- 4.48 The study undertaken by Roger Tym and Partners on behalf of Yorkshire Forward (2010) to establish appropriate assumptions to be applied when planning for employment land derived specifically from regional analysis included consideration of appropriate plot ratios. As a result the calculations undertaken within this ELR applies the most up-to-date assumptions taken from the / Roger Tymes / Yorkshire Futures analysis, which states plot ratios of 35% should be applied across all B use classes.
- 4.49 The following two tables summarise the land requirements generated under the two models considered within the analysis presented previously applying this plot ratio assumption.

Figure 4.11: Land implications of commercial floorspace change model, 2014 – 2027 (ha)

	Office	Industrial	Total
Commercial floorspace change	4.875	52.975	57.85

Source: VOA, GVA Analysis 2014

Figure 4.12: Land implications of labour demand model (gross), 2015 – 2027 (ha)

	B1a/b	B1c/B2	B8	Total
Baseline REM	1.11	10.07	2.29	13.47

Source: ONS, REM, GVA Analysis 2014

- 4.50 The two models suggest a range of land requirements between 13.47 ha and 57.85ha to 2027, or a range of between 1.12 ha and 4.45ha per annum over the period.

### Allowance for choice

- 4.51 The Roger Tym and Partners report for Yorkshire Forward advocates the identification of a 5-year supply of employment land (including allowance for losses) to ensure sufficient choice within the employment land portfolio. The implications of this approach for this ELR are considered within the following chapter.

### Allowance for churn

- 4.52 Employment driven floorspace demand is likely to be a significant driver of the demand for additional floorspace in a local economy. However, it is also true that an element of demand will arise from companies moving, either due to obsolescence of their existing property, the desire for a lower or higher cost location, or simply for strategic reasons.
- 4.53 This form of demand is called ‘churn’ and it represents a general level of turnover in property requirements. Choice and churn can have a significant effect on the amount of employment land and floorspace that is required in order to meet the predicted demand.
- 4.54 For the purposes of this ELR data on vacancy within the commercial stock, and land lost to non-employment uses are used as proxy data to inform consideration of any allowance for choice and churn to be applied within the demand analysis.
- 4.55 Data on vacant property estimates is available from the VOA for the period 1998 to 2005, therefore representing pre-recession levels of choice within the market. This period correlates with approximately half of the period of take-up that this ELR has considered. Figure 4.13 below sets out the level of vacancy recorded by this dataset.

Figure 4.13: Vacant property estimates, 1998 – 2005 (%)

	98-99	99-00	00-01	01-02	02-03	03-04	04-05
Selby	6	6	3	2	3	3	3
Yorkshire and Humber	7	7	6	8	8	8	8
England	7	7	7	8	8	9	9

Source: VOA Experimental Statistics, 2013

- 4.56 It is apparent from this data that the estimated levels of vacancy within commercial stock across Selby has consistently been below that demonstrated across Yorkshire and Humber and England in the period leading up to the recession, never going above an estimated level of 5% following 2000. This suggests a fairly tight market locally and limited speculative development.
- 4.57 Current data on available floorspace is noted in the commercial market analysis, including the identification of some 13,983sq.m office floorspace and 58,646sq.m industrial floorspace currently being marketed across Selby. Whilst detailed analysis of the nature or quality of this supply has not been undertaken, and noting that in some instances the floorspace marketed may not yet be developed, a comparison of these figures with the VOA data on total commercial floorspace suggests that vacancy levels have increased significantly more recently. The figure from this calculation suggests a rate closer to 29% for office stock and 16% for industrial stock. This suggests there is capacity within existing floorspace above that experienced across the period 1998 to 2005, albeit as noted this does not allow for poor quality stock within this available supply which may be unlikely to meet future requirements.
- 4.58 It is too simplistic to assume that this level of vacancy will provide sufficient churn to accommodate growth needs over the whole plan period, although given the market intelligence noted in earlier sections of this report it is recognised that this supply will be suitable to accommodate some of the indigenous demand. However, it would not be appropriate to assume that it will be occupied 100% over the period and it is therefore concluded that a further allowance be applied, of 3.7%, in line with the pre-recession vacancy rates recorded.
- 4.59 Land can also be lost from employment use for alternative uses through the granting of planning permission. It should be noted in this context that the only sites netted out of the supply analysis are those where planning permission has been granted for non-

employment use. Sites where the Council are aware of a potential interest by the landowners to bring the site forward for non-employment uses have not been discounted so as to not pre-empt or pre-determine the planning application and decision making process.

- 4.60 The most significant source of losses of employment land is likely to have occurred when sites or premises in employment use have been converted for use for alternative purposes. However, such losses have not been comprehensively monitored by the Council, and therefore an allowance cannot be assumed above the 3.7% vacancy rate.
- 4.61 The following two tables summarise the land requirements generated under the two models taking into account an allowance for churn, based on historic vacancy rates. It should be noted that no allowance is added on to the commercial floorspace requirements as these figures include occupied and unoccupied space and therefore already include churn allowance.

*Figure 4.14: Land implications of commercial floorspace change model, 2014 – 2027 (ha)*

	Office	Industrial	Total
Commercial floorspace change	5.06	54.94	59.99

Source: VOA, GVA Analysis 2015

*Figure 4.15: Land implications of labour demand model, 2015 – 2027 (including churn) (ha)*

	B1a/b	B1c/B2	B8	Total
Baseline REM	1.15	10.45	2.37	13.97

Source: ONS, REM, GVA Analysis 2015

- 4.62 The two models including an allowance for churn within the re-based REM calculations suggest a range of land requirements between 13.97 ha and 59.99ha to 2027, or a range of between 1.16ha and 4.61ha annually over the period.

### Disaggregation by FEA

- 4.63 As noted within the analysis, the commercial floorspace and REM data is not available to a level below local authority. As a result it is not possible to disaggregate either model directly from its own data.

- 4.64 The analysis of the take-up data available also draws doubt on its use for the disaggregation of these two models – given the concern noted with the 0ha figures for FEA 2, not supported by the IDBR data presented.
- 4.65 As a result, disaggregation has been presented applying the broad splits within the IDBR data, as the ‘best fit’ of the current economy of Selby (and with reference to the geographical distribution of identified ‘key sectors’).
- 4.66 On this basis the following split is identified, as demonstrated in the following tables.

*Figure 4.16: Land implications of commercial floorspace change model, 2014 – 2027 (ha) by FEA*

	Office	Industrial	Total
Total Commercial floorspace based	5.06	54.94	59.99
1: South West only	2.78	30.22	32.99
2: North East only	0.46	4.94	5.40
3: North East & South East	0.40	4.40	4.80
4: Part all three	1.42	15.38	16.80

*Figure 4.17: Land implications of labour demand model (gross), 2015 – 2027 (including churn) (ha) by FEA*

	B1a/b	B1c/B2	B8	Total
Total Baseline REM based	1.15	10.45	2.37	13.97
1: South West only	0.63	5.75	1.30	7.68
2: North East only	0.10	0.94	0.21	1.26
3: North East & South East	0.09	0.84	0.19	1.12
4: Part all three	0.32	2.93	0.66	3.91

*Figure 4.18: Land implications of historic take-up model, 2016 – 2027 (ha) by FEA*

	Total 2014-2027 (Ha)
Total take-up based	37.51
1: South West only	20.63
2: North East only	3.34
3: North East & South East	3
4: Part all three	10.5

## 5. Balancing supply and demand

### Employment Land Demand

5.1 The findings of in relation to employment land demand as set out in Section 4 above are summarised in the tables below. These tables disaggregate the demand by Functional Economic Area.

Figure 5.1: Summary of demand models by FEA

	REM Based (2015 – 2027) (ha)	Land Take-up Based (2016 – 2027) (ha)	Floorspace Based (2014 – 2027) (ha)
FEA1	7.68	20.63	32.99
FEA2	1.26	3.34	5.40
FEA3	1.12	3.00	4.80
FEA4	3.91	10.50	16.80
Total Selby	13.97	37.51	59.99

Figure 5.2: Range of office demand by FEA

	REM Based (2015 – 2027) (ha)	Floorspace Based (2014 – 2027) (ha)
FEA1	0.63	2.78
FEA2	0.10	0.46
FEA3	0.09	0.40
FEA4	0.32	1.42
Total Selby	1.15	5.06

Figure 5.3: Range of industrial demand by FEA

	REM Based (2015 – 2027) (ha)	Floorspace Based (2014 – 2027) (ha)
FEA1	7.05	30.22
FEA2	1.15	4.94
FEA3	1.03	4.40
FEA4	3.59	15.38
Total Selby	12.82	54.94

## Employment Land Supply

- 5.2 As per Figure 3.1 in Section 3 above, the following table summarises the existing / potential employment land supply for each FEA:

Figure 5.4: Sites summary by FEA

Type of development site	FEA1		FEA2		FEA3		FEA4		TOTAL	
	No. of sites	Area (ha)	No. of sites	Area (ha)	No. of sites	Area (ha)	No. of sites	Area (ha)	No. of sites	Area (ha)
EXISTING / POTENTIAL EMPLOYMENT LAND SUPPLY	46	1,259.48	6	81.53	7	57.95	19	392.08	78	1,791.04

- 5.3 Section 3 above sought to identify sites that are considered an option for allocation – i.e. good employment sites in good locations, and sites that we recommend are not considered further.
- 5.4 The total land classed as such by FEA is summarised in Figure 5.5 below:

Figure 5.5: Summary of sites recommendations

	Option for allocation (ha)	Recommend not considered further (ha)
FEA1	658.18	601.30
FEA2	48.39	33.14
FEA3	44.79	13.16
FEA4	127.79	264.29
Total Selby	879.15	911.89

- 5.5 Based on the above alone, Selby has a significant amount of land available that could be considered an option for allocation – 879.15ha..

## The role of strategic sites

- 5.6 As set out at the outset of this report, paragraph 21 states of the NPPF states that: Investment in business should not be over-burdened by the combined requirements of planning policy expectations. Planning policies should recognise and seek to address potential barriers to investment, including a poor environment or any lack of



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infrastructure, services or housing. In drawing up Local Plans, local planning authorities should:

- set out a clear economic vision and strategy for their area which positively and proactively encourages sustainable economic growth;
- set criteria, or identify strategic sites, for local and inward investment to match the strategy and to meet anticipated needs over the plan period;
- support existing business sectors, taking account of whether they are expanding or contracting and, where possible, identify and plan for new or emerging sectors likely to locate in their area. Policies should be flexible enough to accommodate needs not anticipated in the plan and to allow a rapid response to changes in economic circumstances;
- plan positively for the location, promotion and expansion of clusters or networks of knowledge driven, creative or high technology industries;
- identify priority areas for economic regeneration, infrastructure provision and environmental enhancement; and
- facilitate flexible working practices such as the integration of residential and commercial uses within the same unit.

5.7 This paragraph clearly suggests that where driven by an overarching economic strategy, there is scope within a Local Plan to identify strategic sites to meet anticipated needs. It also makes clear that policies should be flexible and allow the plan to respond to changes in economic circumstances.

5.8 In paragraph 21, under the second bullet point, it notes that sites for both local and inward investment should be identified.

5.9 As stated above, NPPF paragraph 21 requires that LPA's set criteria, or identify strategic sites. Based on our Section 2 baseline review, and on this requirement in the NPPF, we recommend that key employment locations in Selby District are identified based on the following criteria:

- 
- A site in proximity to the M62 / A19 / A63 / A64 / A162 / A163 corridors – key strategic accessibility drivers of the Selby economy; and/or a site with alternative modes of connectivity (rail; water etc.);
  - A site which could provide B1/B2/B8 employment land connected with key sectors / the EDS growth zones (manufacturing / logistics; agri-tech / bio-renewables; creative / media; energy);
  - A site with LEP support for delivery;
  - A site supportive of the role of the key centres of Selby, Sherburn-in-Elmet and Tadcaster;
  - A site of a large scale (over 8 - 10ha) offering occupier flexibility and large scale investment potential for locally grown businesses or for inward investors if appropriate;
  - A site with the ability to deliver significant regeneration benefits;
  - A site with the benefit of specific on-site infrastructure which has the ability to attract a specific type of occupier.
- 5.10 Sites may also be identified by a local planning authority for meeting non-employment land economic needs – i.e. sites that could provide valuable land to cater for a particular economic sector albeit that sector may not have a resulting B1/B2/B8 land requirement (for example, Energy related development, or Creative / Media related development).

## Recommendations by FEA

### FEA1 – South West only

#### *Demand*

- 5.11 The demand that we have identified in FEA1 can be summarised as follows:
- Total demand – between 7.68ha and 32.99ha
  - Office demand – between 0.63ha and 2.78ha
  - Industrial demand – between 7.05ha and 30.22ha

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### *Supply*

5.12 The supply position in FEA1 is summarised below:

- Option for allocation = 658.18ha (23 sites) including:
  - KLEY-B - Kellingley Colliery (windfall site) = 74.62ha
  - SHER-P – Sherburn Proving Ground / Sherburn 2 (windfall site ELR 2015) = 34.90ha
  - EGGB-P – North Point Business Park (existing allocation) = 1.65ha
- Recommended not considered further = 601.30ha (23 sites); 5 of which are identified as sites for specific occupiers (totalling 60.44ha).

### *Balancing supply and demand*

5.13 FEA1 is the largest FEA in Selby District. It has a number of sites which are capable of meeting the identified demand, as well as sites which have the potential to provide land over and above this requirement / provide for inward investment opportunities.

5.14 In terms of meeting the modelled demand for B1/B2/B8 uses, the three allocated / windfall sites that are recommended for allocation KLEY-B (Kellingley Colliery), SHER-P (Sherburn Proving Ground) and EGG-P (North Point Business Park) could more than cater for the identified demand.

5.15 KLEY-B (Kellingley Colliery, 74.62ha) is a windfall site (due to receive planning permission subject to the signing of a s106) that is identified as a Potential Employment Site in the EDS and as a strategic priority at LEP level. The site falls within the Manufacturing/ Logistics and Energy indicative growth zones, providing land for both local occupiers and inward investors, benefitting from on-site infrastructure and multi-modal transport connections. The site will deliver regeneration benefits in the wake of the recent colliery closure and is supported at LEP level and by adjacent authorities. KLEY-B clearly classes as a 'strategic site' under the ELR criteria set out above.

5.16 SHER-P (34.90ha) is also a windfall site with the benefit of planning permission for 1,250,000sqft of B2/B8 space. It is well located adjacent to Sherburn Enterprise Park and is supported by the strategic economic policy in the EDS, and at LEP level, and would clearly cater for the sector based need associated with the Manufacturing/ Logistics

indicative growth zone, providing land for both local occupiers and inward investors. Indeed, SHER-P clearly also classes as a 'strategic site' under the ELR criteria set out above.

- 5.17 EGG-P (1.65ha) is identified as a site to cater for local occupier need.
- 5.18 However, this does focus the vast majority of supply on two large sites, and it is therefore important that the other possible sites within the supply are considered further. They are reviewed by geography below.
- 5.19 FAIR-M (Land at Junction 42 of A1(M), 128.36ha) and SMIL-P (Land East of A1(M) /A63 Junction, South Milford, 16.95ha) are sites that are strategically well located and that could provide an opportunity to deliver high quality business park / warehouse & distribution park space. They would cater to local occupiers and inward investors, but would be large sites located in relative isolation from any settlements and between Kellingley Colliery and Sherburn 2, which are already likely to cater for demand in the vicinity.
- 5.20 SHER-AA (Gascoigne Wood, 70.66ha) is a former mine related site that specifically benefits from rail freight infrastructure on site, and that therefore has the potential to meet related specific occupier needs. It is also a well screened site that could cater for recycling / environmental industries. To inform PLAN Selby, it will be important to identify how much of the land at the site is in existing operational use (for B1/B2/B8 or other) and how much of the site is available for redevelopment associated with B1/B2/B8 occupiers.
- 5.21 At Sherburn, in addition to the Proving Ground and Gascoigne Wood a further site identified as an option for allocation is SHER-AM (22.90ha). This site is in proximity to existing employment uses and on the A162 key route. Whilst this site is an option for allocation, it must however be concluded that it is not likely to be required for development considering the strength and role of Sherburn Enterprise Park and the Proving Ground in the locality (as the Proving Ground is developed, further plots / buildings are likely to be freed up for occupation by indigenous need at Sherburn Enterprise Park).
- 5.22 WHIT-Q (60.16ha), WHIT-P (40.20ha) and WHIT-O (29.70ha) are sites located in the strategic motorway corridor that were identified by officers as possible future employment sites. Due to their location alongside the strategic M62 motorway corridor, these sites are
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identified as options for allocation that could attract inward investment. However, they have not been promoted through the call for sites, and the landowner intentions are unknown. Consideration of these sites is in reality in its infancy, and there are more strategically supported sites in the vicinity that already have significant support for development (in particular, Kellingley Colliery).

- 5.23 Also in the vicinity of the M62, junction 34 is WHIT-K (10.90ha), located to the south at Whitley. Whilst this site is identified as an option for allocation, again, the strategic importance of Kellingley, as well as the potential issues with residential amenity, mean that at this stage, comparative to other sites, this is unlikely to be needed to meet employment demand.
- 5.24 WHIT-R (1.19ha) is also nearby, just to the north of the M62. It is again well located, however, clarity is required as to access arrangements (as the site is set back from the road). In any event, it is understood that the site is proposed for development by the owner and therefore is likely to become a site for a specific occupier, rather than a site that would be more generally available to the market.
- 5.25 In the vicinity of Eggborough / Hensall, a focus of established employment use activity just a bit further north of junction 34, there's again a number of sites that have been identified as options for allocation.
- 5.26 EGGB-R (Eggborough Power Station, 118.40ha) is a well-known landmark. Given its recent use, it is subject to significant development constraints, but nevertheless is considered suitable for employment re-use – potentially as a high quality business park / warehouse & distribution park / a specialised freight terminal. It is considered that given the employment land supply in the general locality already (e.g. Kellingley Colliery), it is likely that the redevelopment of this site for non-energy generating uses will be an opportunity likely to come to fruition beyond the current plan period.
- 5.27 Other sites in the locality include: HENS-F (13.50ha), another site identified as a possible employment site by officers, adjacent to Saint Gobain Glass, with the potential to cater for both local and inward investment needs; HENS-G (6.57ha), a site adjacent to existing employment uses at Hensall, identified as for local occupiers; and EGGB-K (5.32ha), a site adjacent to Eggborough Power Station, which is identified as suitable for both local occupiers and inward investors. In particular HENS-F and EGGB-K could cater well for

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- general industrial / business needs, potentially related to the Energy indicative growth zone.
- 5.28 Consideration should potentially be given to the allocation of some land at Eggborough / Hensall to meet future needs in PLAN Selby and to offer choice in the FEA, albeit not all of the land identified will be required. However, it may be considered that with a focus on Kellingley Colliery, which could cater for multiple sector needs in the FEA, that there will be no further strategic needs connected to growth sectors at Eggborough / Hensall.
- 5.29 In Tadcaster, again a key location, but where there is currently little new employment land, there's a number of sites that are considered options for allocation. These are: TADC-Q (7.22ha), identified as a possible employment site by officers due to its proximity to the A64, which is located next to existing employment development, but which is not currently being promoted for development and therefore with unknown landowner intentions; and TADC-Y (6.56ha) which is land at Grimston Grange Estate, adjacent to land already developed for employment uses (albeit small scale offices), which if developed will require strong signage off the strategic road network; both of which are identified as opportunities for local and inward investment occupiers.
- 5.30 Also in Tadcaster, TADC-W (2.42ha) and TADC-H (0.57ha) are located centrally and identified as options for allocation, most likely suited to local occupiers for office / light industrial uses, and amenity issues would require consideration.
- 5.31 Lastly there is TADC-X (1.93ha) and TADC-AB (1.29ha), identified as options for allocation due to their location in relation to the strategic road network that could be suitable for local occupiers or inward investors, and which have the potential to provide a new employment offer in Tadcaster.
- 5.32 Tadcaster is currently lacking any employment land to maximise the benefits of the strategic location of the town between Leeds and York. Based on deliverability and amenity considerations, and scale, it is likely that land at Grimston Grange would be best suited to allocation of the options identified.
- 5.33 Beyond Tadcaster towards York lies BILB-C (2.21ha). This site is identified as an option for allocation for a general industrial / business use for a local occupier or an inward investor, in a good strategic location albeit relatively isolated from a main centre / other
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employment uses. Any further consideration as to the role of this site would require liaison with York Council due to its proximity to the Selby / York boundary.

5.34 In terms of sites not recommended as options for allocation, as set out in Section 3 above, 5 such sites are identified as sites for specific occupiers (EGGB-Q, EGGB-N, SHER-AJ, EGGB-O, and HECK-C). In addition, it is recommended that the currently allocated TADC-M is not carried forward due to historic issues with deliverability.

5.35 Further to these sites, two other sites recommended for no further consideration for B1/B2/B8 are worthy of note. One site is CFAB-A (181.41ha), which is land at Church Fenton Airbase. Whilst not supported as a suitable location for stand-alone B1/B2/B8 uses, that doesn't mean that this site can't play a role in the wider economy for non-B1/B2/B8 uses, in line with its promotion as the 'Yorkshire Studios' – part of the Creative/ Media indicative growth zone identified in the EDS.

5.36 The other site is WIST-H (12.20ha), the former Wistow Mine site. This site is recognised as 'may be appropriate for employment development'. It is recognised as having the benefit of onsite infrastructure and having the potential to appeal to a particular occupier, but it is removed from the strategic highway network and has significant constraints, therefore it is considered that other former mine sites are better located.

5.37 Therefore, in conclusion, in balancing supply and demand in FEA1, the following sites are worthy of consideration as part of the future employment land supply in PLAN Selby, to meet a combination of local and inward investment need, or specialist needs, and to address the diverse nature of the FEA with several strategic corridors / hub locations for employment uses. The exact amount of employment land available (not in existing B1/B2/B8 or non-B1/B2/B8 use, but development land for B1/B2/B8 uses) at each site will require resolution as part of this process.

- KLEY-B – Kellingley Colliery (74.62ha) – a strategic site, likely to cater for the Manufacturing / Logistics and Energy indicative growth zones;
- SHER-P – the Proving Ground (34.90ha) – a strategic site, likely to cater for the Manufacturing / Logistics indicative growth zone;
- EGGB-P – North Point Business Park, Eggborough (1.65ha), likely to meet local occupier needs for general industrial / business uses;

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- SHER-AA – Gascoigne Wood (70.66ha) – a potentially strategic site for freight based / environmental industries;
  - HENS-F – adjacent to Saint Gobain Glass (13.50ha) - potentially to cater for the needs of the Energy indicative growth zone or general industrial / business needs;
  - TADC-Y – land at Grimston Grange Estate (6.56ha), providing the opportunity to provide a High Quality Business Park for local occupiers and inward investors;
  - EGGB-K – adjacent to Eggborough Power Station (5.32ha) – potentially to cater for the needs of the Energy indicative growth zone or general industrial / business needs.

5.38 The total allocated and/or with the benefit of planning permission will inevitably exceed the modelled demand figures for the FEA, but it is considered that there that there could be justification based on paragraph 21 of the NPPF to take this approach, and it will ensure that a choice of sites is offered within a comparatively large FEA. It will be down to PLAN Selby to balance the final choice of allocations in this FEA within the context of the Local Plan and it may be that not all of the above are deemed to be required.

## FEA2 – North East only

### *Demand*

5.39 The demand that we have identified in FEA2 can be summarised as follows:

- Total demand – between 1.26ha and 5.40ha
- Office demand – between 0.10ha and 0.46ha
- Industrial demand – between 1.15ha and 4.94ha

### *Supply*

- Option for allocation = 48.39ha (3 sites) (none of which are existing allocations / windfalls).
- Recommended not considered further = 33.14ha (3 sites); none of which are identified as sites for specific occupiers.



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*Balancing supply and demand*

- 5.40 FEA2 takes up a comparatively small part of Selby District at the north east corner. It has no existing allocations / windfalls (ELR 2015) and only 6 sites that have been subject to detailed assessment. 3 of the 6 sites are identified as options for allocation.
- 5.41 One of the sites is located at Escrick – ESCK-C (3.15ha) – land adjacent to Escrick Business Park. This site is considered to be strategically well located, with a proven track record of delivery. It is considered that this site could expand the existing offer and cater for local occupiers and inward investors. In particular, this site could assist in providing land to cater for employment development that cannot be accommodated within York’s constrained boundary, and/or catering for the Agri-Tech / Bio-renewables indicative growth zone.
- 5.42 The other 2 sites are located in Riccall. RICC-H (42.00ha) is a former mine site, now branded as Riccall Business Park. This is identified as having the potential to meet a specific type of occupier need (due to on site infrastructure and the nature of the site), with the benefit of proximity to the strategic road network. It is therefore identified as a heavy / specialist industrial site or for recycling / environmental industries. The EDS also identifies the former mine sites as having the potential to meet the needs of the Agri-Tech / Bio-renewables indicative growth zone. It is unclear how much of this site is in existing operational use (for B1/B2/B8 or other) and how much of the site is available for redevelopment associated with B1/B2/B8 occupiers.
- 5.43 RICC-C (3.24ha) – land east of York Road, is identified as a site for a local occupier to meet general industrial / business needs with the benefit of a good location. On balance, with the benefit of ESCK-C and RICC-H (subject to the nature of the offer at the latter) it is unlikely that RICC-C will be required.
- 5.44 Also for FEA2, it is important to remember that there is a very strong relationship with FEA3, therefore the supply across both FEAs should be balanced.
- 5.45 In terms of sites not recommended as options for allocation, worthy of note is the former Stillingfleet Mine site (STIL-C, 31.60ha). As per Wistow Mine in FEA1, this site is recognised as ‘may be appropriate for employment development’. It is recognised as having the benefit of onsite infrastructure and having the potential to appeal to a particular

occupier, but it is removed from the strategic highway network and has significant constraints, therefore it is considered that other former mine sites are better located.

5.46 Therefore, in conclusion, in balancing supply and demand in FEA2, the following sites are worthy of consideration as part of the future employment land supply in PLAN Selby, to meet a combination of local and inward investment need, or specialist needs. As per FEA1, the exact amount of employment land available (not in existing B1/B2/B8 or non-B1/B2/B8 use, but development land for B1/B2/B8 uses) at each site will require resolution as part of this process.

- RICC-H – Riccall Business Park (42.00ha) – a site which would appeal to specific occupiers due to on site infrastructure and the nature of the site, with the potential to cater for the Agri-Tech / Bio-renewables indicative growth zone;
- ESCK-C – land adjacent to Escrick Business Park (3.15ha) – with potential to meet local and inward investment needs, to potentially cater for the Agri-Tech / Bio-renewables indicative growth zone, and bolster York’s land supply.

5.47 The allocation of ESCK-C would substantively meet the demand as modelled for this FEA. With regard to Riccall Business Park, this would allocate land in excess of the modelled demand, but it is considered that there could be justification for this based on paragraph 21 of the NPPF. As per FEA1, it will be down to PLAN Selby to balance the final choice of allocations in this FEA within the context of the Local Plan.

### FEA3 – North East & South East

#### *Demand*

5.48 The demand that we have identified in FEA3 can be summarised as follows:

- Total demand – between 1.12ha and 4.80ha
- Office demand – between 0.09h and 0.40ha
- Industrial demand – between 1.03ha and 4.40ha

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### *Supply*

- Option for allocation = 44.79ha (4 sites) (none of which are existing allocations / windfalls).
- Recommended not considered further = 13.16ha (3 sites); 2 of which are identified as sites for specific occupiers (totalling 2.66ha).

### *Balancing supply and demand*

- 5.49 FEA3 covers the eastern portion of Selby District and is an area of overlap between the Selby North East FEA and the Selby South East FEA in the EDS.
- 5.50 4 of the 7 sites that have been subject to assessment are recommended as options for allocation.
- 5.51 One site is CLIF-E (27.00ha) – Whitemoor Business Park (former mine site). As per Riccall Business Park, this site is identified as having the potential to meet a specific type of occupier need (due to on site infrastructure and the nature of the site), with the benefit of proximity to the strategic road network. It is therefore identified as a heavy / specialist industrial site or for recycling / environmental industries. The EDS also identifies the former mine sites as having the potential to meet the needs of the Agri-Tech / Bio-renewables indicative growth zone. Again, as per Riccall, it is unclear how much of this site is in existing operational use (for B1/B2/B8 or other) and how much of the site is available for redevelopment associated with B1/B2/B8 occupiers.
- 5.52 Another site is BARL-E (14.54ha) – Magazine Farm, Selby Bypass. This site is located to the north east of Olympia Park, across the A63. It is considered appropriate for employment development subject to the resolution of potential constraints, potentially for a high quality business park / warehouse & distribution park. However, it is noted that it may not be required alongside the land available at Olympia Park.
- 5.53 The other two sites are smaller sites in Hemingbrough off the A63 that would cater for local general industrial / business needs – HEMB-U (1.63ha) – the Old Brickworks, and HEMB-Y (1.62ha), albeit the status of the existing businesses on the sites and the landowner intentions are unknown.

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5.54 In terms of sites not recommended as options for allocation, as set out in Section 3 above, 2 such sites are identified as sites for specific occupiers (CLIF-M and HEMB-T).

5.55 Therefore, in conclusion, in balancing supply and demand in FEA3, the following sites are worthy of consideration as part of the future employment land supply in PLAN Selby, to meet a combination of local and inward investment need, or specialist needs. As per the other FEAs, the exact amount of employment land available will require resolution as part of this process.

- CLIF-E – Whitemoor Business Park (27.00ha) – a site which would appeal to specific occupiers due to on site infrastructure and the nature of the site, with the potential to cater for the Agri-Tech / Bio-renewables indicative growth zone; and
- HEMB-U / HEMB-Y – the Old Brickworks, Hemingbrough (1.63ha) and the Coach Station, Hemingbrough (1.62ha) – to cater for a local general industrial / business need, subject to confirmation of deliverability.

5.56 Viewing FEAs 2 and 3 together, the combination of the two former mine sites (Riccall and Whitemoor Business Parks) and ESCK-C are likely to be sufficient to meet demand. Separating out the former mine sites as having a potentially specialist occupier need, then across the two FEAs, other local sites may be needed –the two HEMB sites and/or RICC-C could be considered.

5.57 Regarding BARL-E, it is recommended that this is considered alongside the recommendations of FEA4 to which it is closely related; in particular enabling consideration of the relationship between any allocation of BARL-E and the Olympia Park strategic site.

## FEA4 – Part all three

### *Demand*

5.58 The demand that we have identified in FEA4 can be summarised as follows:

- Total demand – between 3.91ha and 16.80ha
- Office demand – between 0.32ha and 1.42ha
- Industrial demand – between 3.59ha and 15.38ha

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### *Supply*

- Option for allocation = 127.79ha (14 sites) including:
  - SELB-CA (existing allocation) = 91.21ha
  - SELB-BW – Land at Access 63 (existing allocation) = 1.89ha
  - SELB-AD – Land to the West of Selby Business Park (existing allocation) = 1.75ha
  - SELB-BU – Land South of Oakney Wood Drive (existing allocation) = 0.75ha
- Recommended not considered further = 264.29ha (5 sites); none of which are identified as sites for specific occupiers.

### *Balancing supply and demand*

- 5.59 FEA4 covers the centre of Selby District and reflects the zone where all of the three FEAs in the EDS intersect. It includes Selby town, as well as Brayton and Burn.
- 5.60 14 of the sites that have been subject to assessment are recommended as options for allocation.
- 5.61 The largest site is SELB-CA (91.21ha) – the Olympia Park site. This is a strategic site and a priority project for the Council and wider sub-region. It is supported by the Core Strategy, strategic economic policy in the EDS, and at LEP level, and could cater for the sector based need associated with the Agri-Tech / Bio-renewables and Creative / Media indicative growth zones, providing land for both local occupiers and inward investors. Given its strategic location, it could also cater for logistics needs, albeit outside of the indicative growth zone which is understandably focused around reinforcing existing locations. Indeed, SELB-CA clearly classes as a ‘strategic site’ under the criteria set out above.
- 5.62 It must be noted that the site area noted for Olympia Park is reflective of the PLAN Selby site boundary (91.21ha) but this exceeds the 23ha identified for employment use in the Core Strategy. In terms of progress with development, the access stub road has been installed from the A63, but as far as we are aware, no permission exists for substantive new B1/B2/B8 development. There are also a number of references in our baseline review to difficulties with securing permissions. It is important that these issues are resolved to ensure

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delivery of this strategic development site. It is understood that the Council has recently secured £9 million of Housing Infrastructure Fund money to unlock the development of the site for housing and employment uses which will certainly assist.

- 5.63 4 of the sites are focussed around the junction of the A63/A19 at Brayton / Burn, including BRAY-S (13.29ha), BRAY-T (6.84ha), BURN-A (6.17ha) and BRAY-Y (1.13ha). The 3 larger sites are identified as potential sites for a high quality business park / warehouse & distribution park given their strategic location for local occupiers and inward investors. The smaller site is subject to potential access issues, and due to its size is considered a potential site for general industrial / business and for local occupiers only. The landowner intentions of BRAY-T and BRAY-S are also unknown. However, all 4 sites are unlikely to be needed to cater for future demand during the plan period with the Olympia Park site in such close proximity.
- 5.64 Three further sites are identified as options for allocation in / adjacent to the established Selby Business Park. These sites are SELB-BX (1.99ha) and SELB-AD (1.75ha), located to the west of the Business Park; and SELB-BU (0.75ha), located within the Business Park. SELB-AD and SELB-BU are the remaining land of the existing allocation. All of the sites are identified as likely to cater for general industrial / business uses, for local occupiers or inward investors, as per the existing business park. It is unclear if SELB-BU is available for development or if it is in use for open storage; and in terms of SELB-AD and SELB-BX, landowner intentions require clarification (as they are promoted for residential development). As a standalone site, the ability to access SELB-B also requires clarification. These issues would need to be reviewed / resolved prior to any allocation in PLAN Selby.
- 5.65 Another site identified as an option for allocation is SELB-BW (1.89ha) – Land at Access 63, the remaining land of an existing allocation. This land is a frontage plot at a recently developed business park, which is also identified as likely to cater for general industrial / business uses, for local occupiers or inward investors, as per the existing business park. We have noted that the planning permission status of this remaining land and the reason why as a frontage plot it hasn't been developed are unclear. These issues would require resolution prior to any allocation in PLAN Selby.
- 5.66 The 5 other sites identified as options for allocation are less than 1ha and located within the urban area of Selby town. SELB-S (0.68ha) - Back Micklegate Car Park and SELB-M

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- (0.47ha) – Land North of Portholme Road are both identified as having the potential to cater for local occupiers for office uses.
- 5.67 SELB-BC (0.63ha) – Former Gas Holders, Prospect Way, and SELB-AB (0.58ha) – Council Depot, Barlby Road are both identified as having the potential to accommodate general / industrial uses for local occupiers, subject to the resolution of technical constraints.
- 5.68 Lastly, SELB-BA (0.41ha) - Vivars Way, Canal Road is identified as a site that could cater a local occupier for general industrial / business use..
- 5.69 In terms of sites not recommended as options for allocation, it is recommended that the currently allocated SELB-AW is not carried forward due to historic issues with deliverability and the fact that other uses are being pursued by the landowner. It is also recommended that SELB-AR (a windfall site in the ELR 2015) is not carried forward due to likely development constraints and the comparative suitability to other possible employment sites in the FEA.
- 5.70 Further to these sites, one other site recommended for no further consideration for B1/B2/B8 is worthy of note. This is BURN-G (228.80ha) – Burn Airfield. This site is identified as a Potential Employment Site in the EDS, and is in proximity to the strategic road network as well as waterway/rail corridors, however, this is a very large site close to Olympia Pak with a rationale for site promotion that is not yet developed and technical feasibility work is needed. Consideration of the potential of this site should be undertaken comprehensively, looking beyond the current plan period.
- 5.71 Therefore, in conclusion, in balancing supply and demand in FEA4, the following sites are worthy of consideration as part of the future employment land supply in PLAN Selby, to meet a combination of local and inward investment need, or specialist needs. As per the other FEAs, the exact amount of employment land available will require resolution as part of this process.
- SELB-CA – Olympia Park (91.21ha) – a strategic site, with 23ha identified for employment use in the Core Strategy, likely to cater for the Agri-Tech / Bio-renewables and Creative / Media indicative growth zones;
  - SELB-BX (1.99ha), SELB-AD (1.75ha) and SELB-BU (0.75ha) at / adjacent to Selby Business Park, with the potential to provide an alternative to Olympia Park in the FEA

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for general industrial business use; potentially to cater for the Creative / Media and Energy indicative growth zones, subject to landowner buy-in;

- SELB-BW (1.89ha) – Land at Access 63 – as per the Selby Business Park land above, and likely to cater for the Agri-Tech / Bio-renewables and Creative / Media indicative growth zones;
- SELB-S (0.68ha) - Back Micklegate Car Park and/or SELB-M (0.47ha) – Land North of Portholme Road, Selby, which is both identified as having the potential to cater for local occupiers for offices uses;
- SELB-BC (0.63ha) – Former Gas Holders, Prospect Way, and/or SELB-AB (0.58ha) – Council Depot, Barlby Road, and/or SELB-BA (0.41ha) - Vivars Way, Canal Road – identified as a sites that could cater a local occupier for general industrial / business use.

5.72 It is clear that a combination of these sites would more than cater for the modelled demand for the FEA, but it is considered that there that there could be justification based on paragraph 21 of the NPPF to take this approach, and it will ensure that a choice of sites is offered within the FEA. It will be down to PLAN Selby to balance the final choice of allocations in this FEA within the context of the Local Plan and it may be that not all of the above are deemed to be required.

5.73 With reference to the review of FEA 3 above, it is considered that BARL-E is not required in addition to Olympia Park.

## Policy recommendations

5.74 As set out in Section 2, Core Strategy Policy SP13 states that the Council will support the provision for an additional 37 – 52 ha of land for employment development to be brought forward across the District in the period up to 2027.

5.75 The policy supporting text provides an Indicative Employment Land Distribution breakdown of:



- Selby and Hinterland providing 22-27 hectares,
- Tadcaster providing 5-10 hectares,
- Sherburn in Elmet providing 5-10 hectares, and
- The rural areas (including Eggborough and A19 corridor) providing 5 hectares.

5.76 The findings of the demand modelling work that has been undertaken in Section 4 of this report and reflected in Figure 5.1 above support this adopted policy position in terms of the overall quantum of identified demand. Across the FEAs, the latest split in the demand modelling does not however fully match the geographical distribution in SPA13. Using FEAs as a basis for defining need and then considering suitable sites within that area for allocation is an appropriate revised approach to take in the context of PPG guidance. In broad terms, the requirements for FEA1 are not dissimilar when Tadcaster, Sherburn and the rural areas (in part) are aggregated. The demand identified for Selby and Hinterland is higher than the demand for FEA4, but when considered alongside the rural areas (in part) and equated to FEA2, 3 &4, again they are not dissimilar.

5.77 Any departure from strict adherence to the locality split set out in SPA13 is not considered to undermine its overall aim, therefore the revised distribution by FEA in this ELR should be considered an acceptable starting point for allocation of sites in PLAN Selby.

5.78 We consider that, as above, the Council should through PLAN Selby, seek to identify sites for meeting both local and inward investment needs. This will be assisted through the identification of strategic sites, as required by NPPF. Strategic sites can fulfil a dual function to meet both local and inward investment needs, but it is considered that a range of sites including those to meet more local needs only should be identified.

5.79 Sites that have clearly emerged as strategic sites in this ELR are: Olympia Park, Sherburn Proving Ground (Sherburn 2) and Kellingley Colliery. These sites clearly provide a focus that can meet the requirements of the economic strategy, enabling targeting of the four key indicative growth zone sectors in the EDS. They will have the ability to cater for both local and inward investment needs. Clarity as to the development land available for B1/B2/B8 uses at each of these locations will be important in informing policy development.

- 5.80 In addition, it will be necessary to identify allocations that can cater for more local needs. Sites such as adjacent to North Point Business Park and adjacent to Escrick Business Park could fulfil this need, as well as land at Selby Business Park and Access 63, and smaller sites within the Selby urban area. There is also a potential role for land at Tadcaster at Grimston Park Estate.
- 5.81 The role of the former mine / mining related sites also requires consideration. Three such sites are identified as being most likely to be able to play a role in the economy in Selby – Gascoigne Wood, Riccall Business Park and Whitemoor Business Park. Stillingfleet and Wistow are not well located and are considered comparatively less suitable for business uses.
- 5.82 To some extent these sites will be able to cater for local (and potentially inward investment needs) but for a limited range of occupiers as the sites will not appeal to all. A key differentiating factor for the sites is the availability of freight opportunities at Gascoigne Wood, and the on-site infrastructure and locations on the A19 / A163 corridors of Riccall and Whitemoor Business Parks.
- 5.83 The sites are well screened and the ELR identifies them as potentially appropriate for heavy / recycling and environmental industries (with the additional opportunity for a freight terminal at Gascoigne Wood), and the EDS identifies the Riccall and Whitemoor sites as potential opportunities for business start-ups in smaller businesses/business start-ups in the agri-tech and bio-renewables sectors.
- 5.84 Gascoigne Wood has the potential to be considered a strategic site given its potential to promote freight within the Manufacturing / Logistics indicative growth zone.
- 5.85 In relation to the mine / mine related sites, as stated earlier in this ELR, it will also be important to ascertain how much of each site is in existing operational use (for B1/B2/B8 or other) and how much of the site is available for redevelopment associated with B1/B2/B8 occupiers and therefore can be considered part of the available land supply.

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## Duty to Cooperate

- 5.86 As set out in Section 2 of this report, neighbouring local authorities have been consulted during the preparation of this evidence base document, necessitated by the Duty to Cooperate as required by the Localism Act.
- 5.87 Neighbouring authorities were consulted to ascertain the status of their Local Plans with regard to employment land, and to gather an understanding of the relationship between the relevant local authority area and Selby in terms of the economy. The feedback of desk based research and engagement with officers (where they have been available) has been integrated directly into Section 2 of this report under the heading 'Adjacent authorities'.
- 5.88 It is proposed that in order to continue to fulfil the Duty to Cooperate that the Council shares the final version of this report with the neighbouring authorities to seek their comments and use those to inform any resulting policy development. The evidence base is by and large a factual document, therefore any comments are likely to focus on the policy recommendations and resulting policy development.

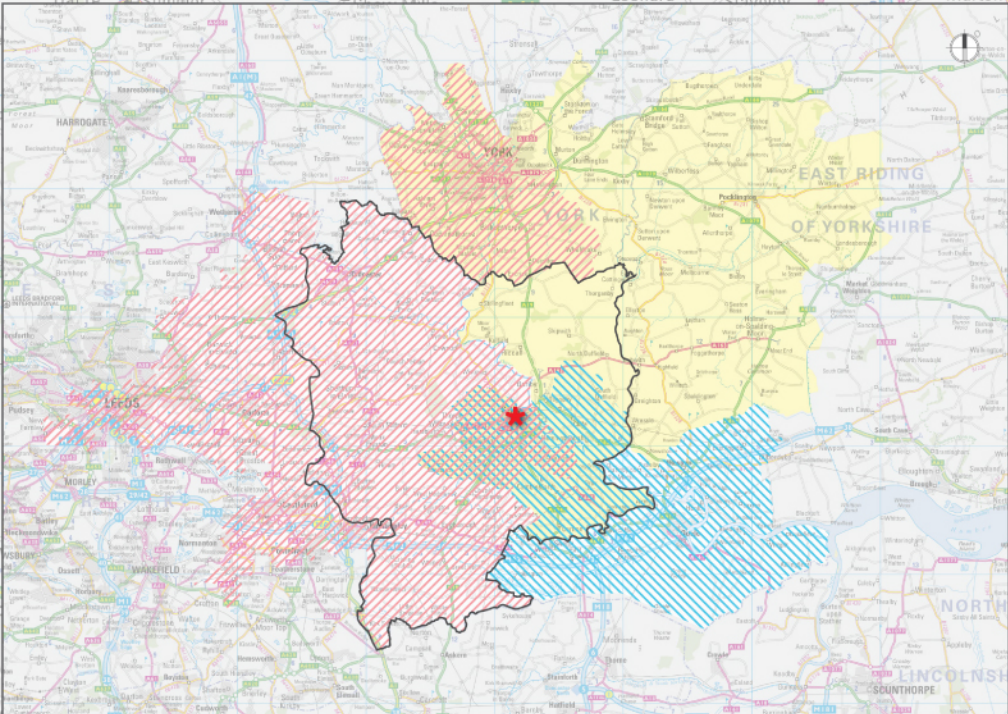
## Monitoring

- 5.89 Guidance recognises the need for appropriate monitoring to ensure that evidence base is kept up to date over the course of the plan period. It is standard practice to consider updating ELR evidence every 5 years. In this context it is important that key monitoring is undertaken to assist the preparation of future evidence, and to test the ongoing appropriateness of this ELR document. Key monitoring areas include:
- Details of extant employment planning permissions on allocated sites and windfall sites, which should be recorded by date of approval, type (B use class), and location (by FEA);
  - Employment land take up (development) across different types of sites (allocated or windfall), which should be recorded where possible by date, type (B use class), and location (by FEA);
  - Losses of employment land, which should be recorded where possible by date, and location (FEA);




- Annual changes in employment and business base, which can be obtained through the Business Register and Employment Survey (Nomis), broken down by sector (to 2 digit SIC code), and by Local Authority and more localised level (ward / Super Output Area if available); and
- Annual iterations of the Regional Econometric Model (REM) from the Regional Intelligence Unit, with particular reference to the local implications of changes in the UK economy.

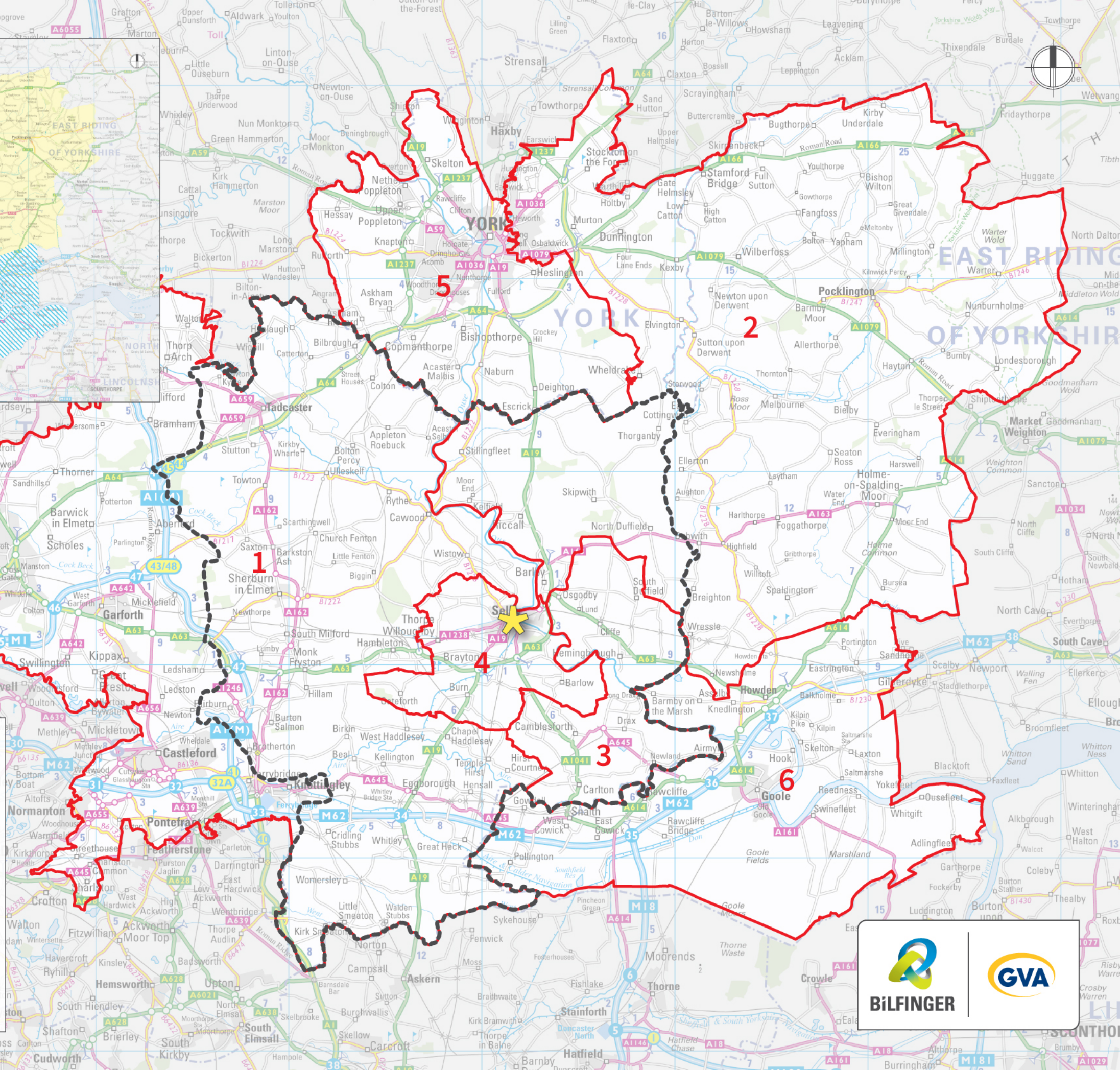
## Appendix 1: ELR FEA boundaries





### PROPOSED SELBY DISTRICT FUNCTIONAL ECONOMIC AREAS

-  Selby
-  Selby District Council Boundary
-  FEA Boundary
- 1 South West
- 2 North East
- 3 North East and South East
- 4 Part all three
- 5 North
- 6 South East





## Appendix 2: Schedule of sites



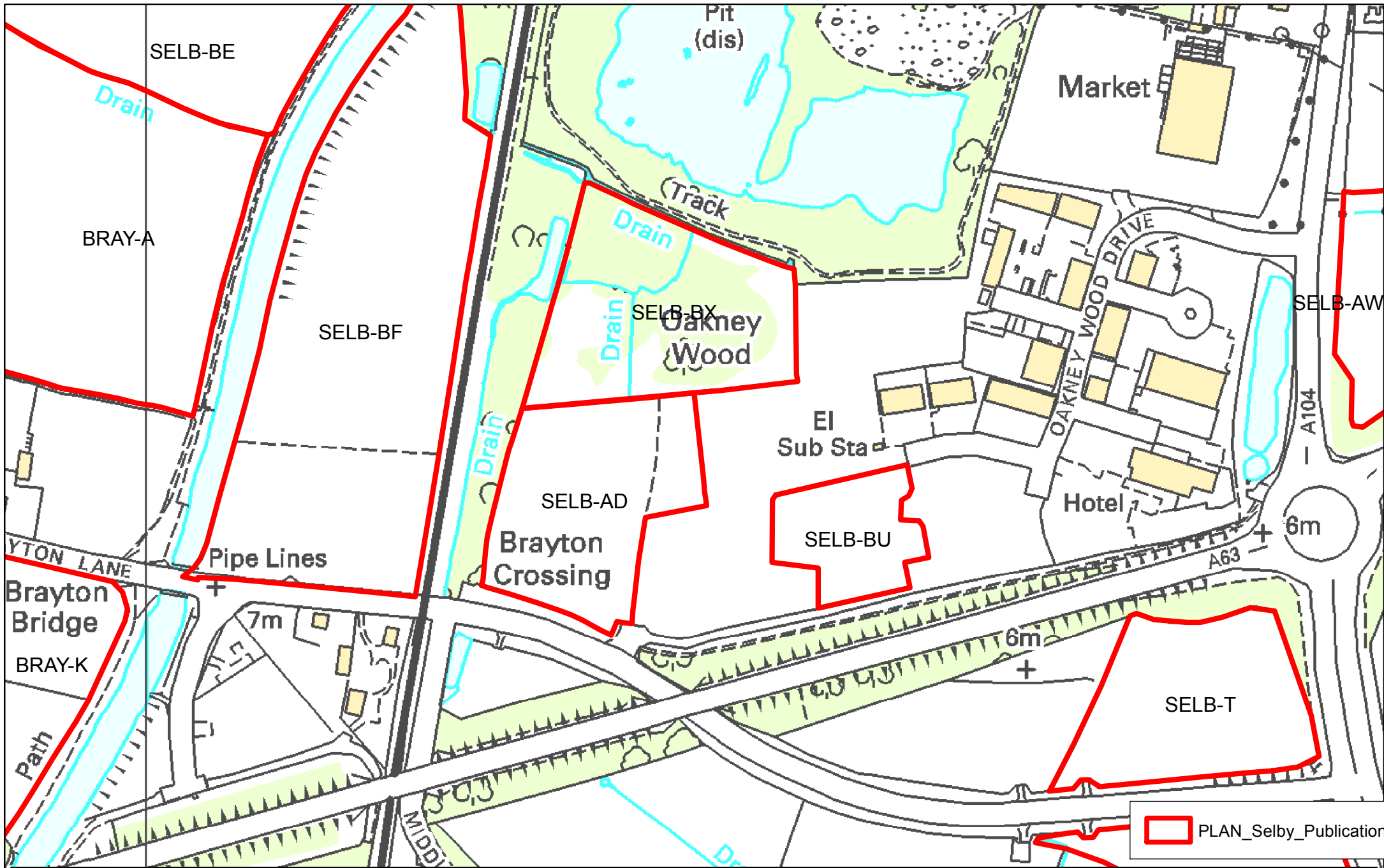






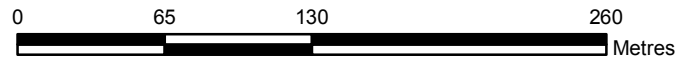


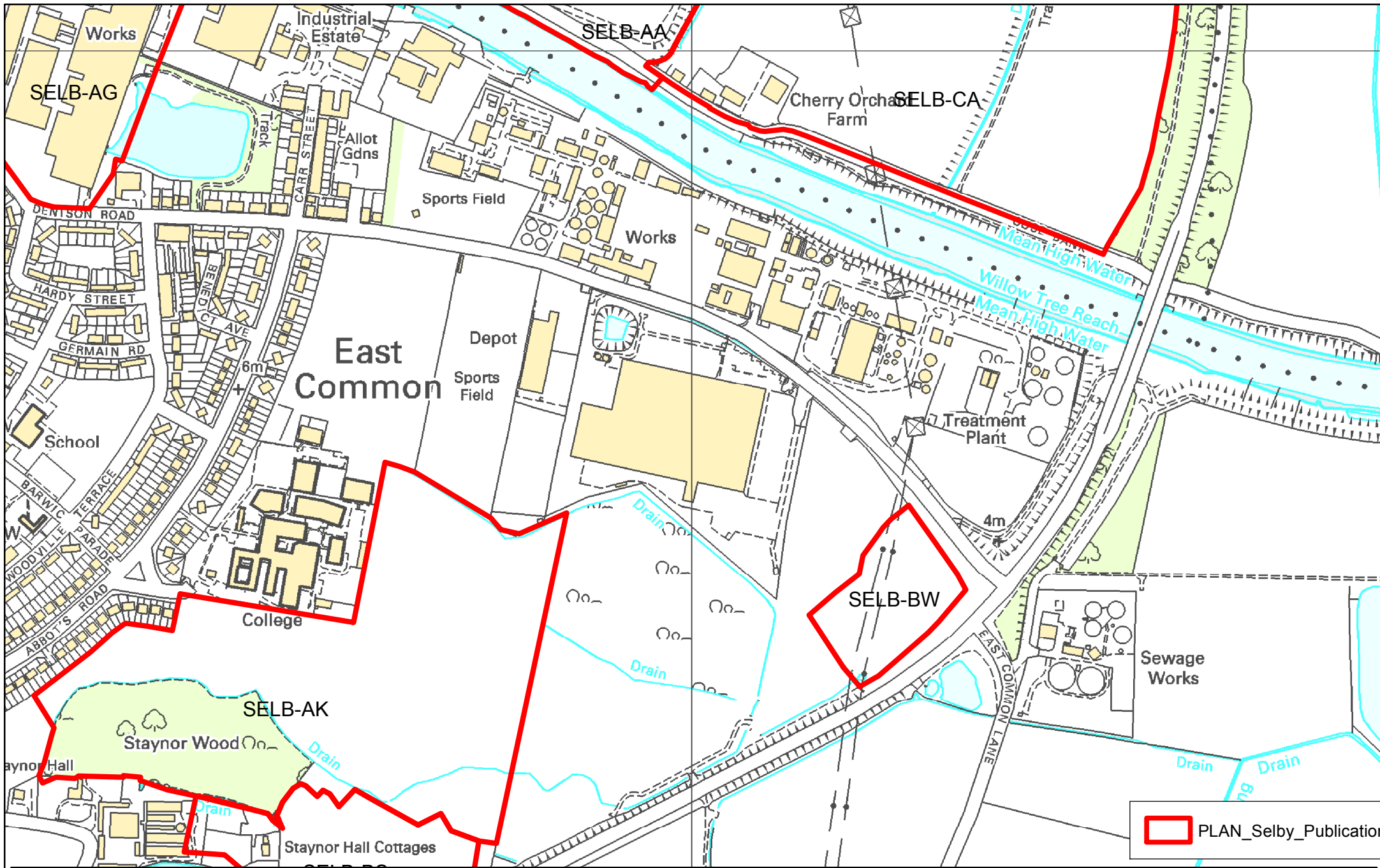
## Appendix 3: Further sites mapping



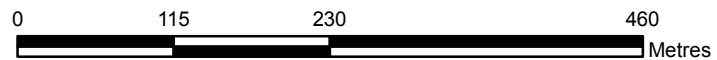
PLAN\_Selby\_Publication\_S

SELB-AD

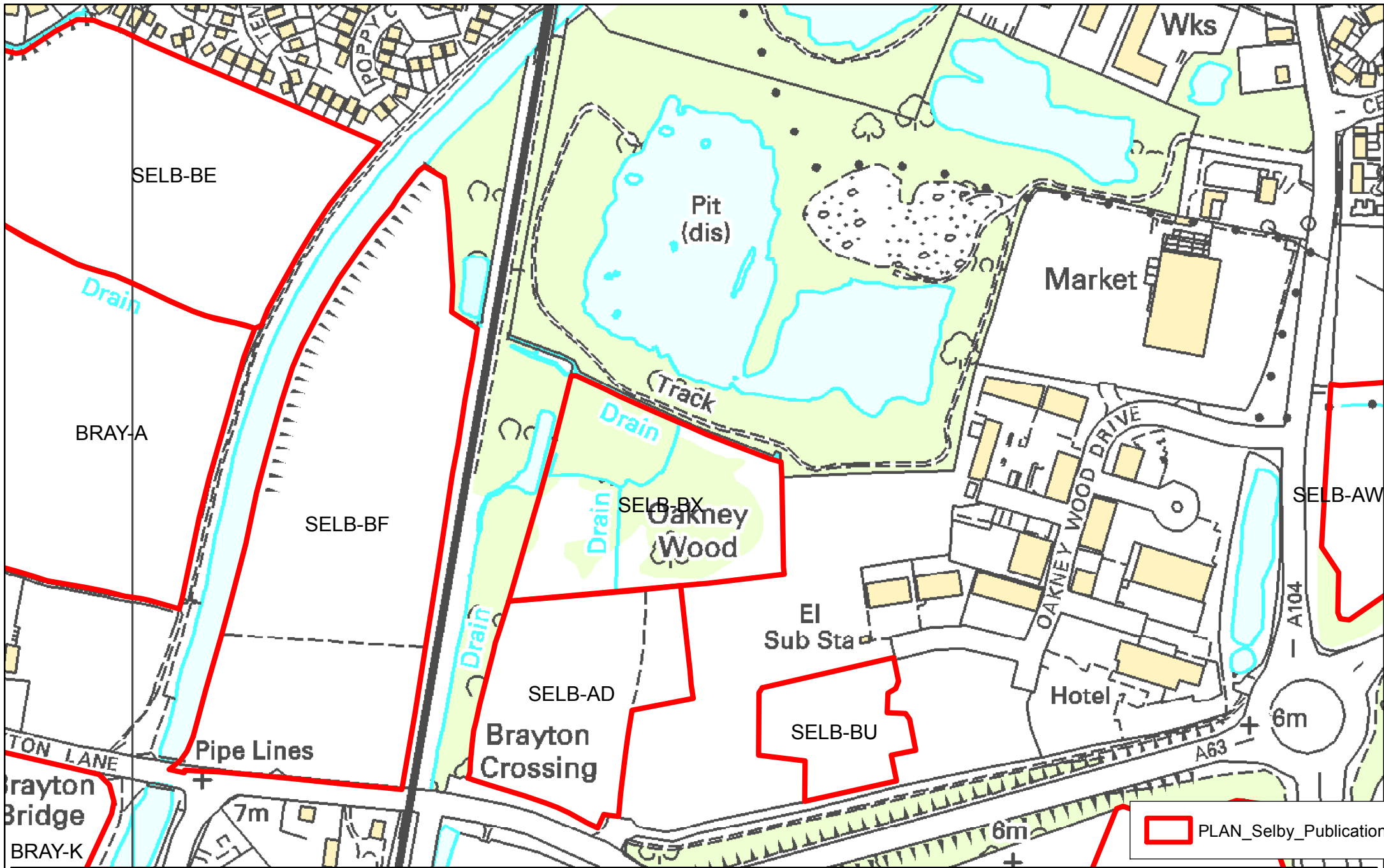




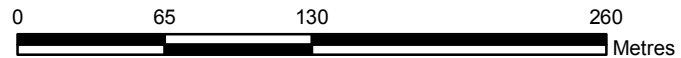
SELB-BW

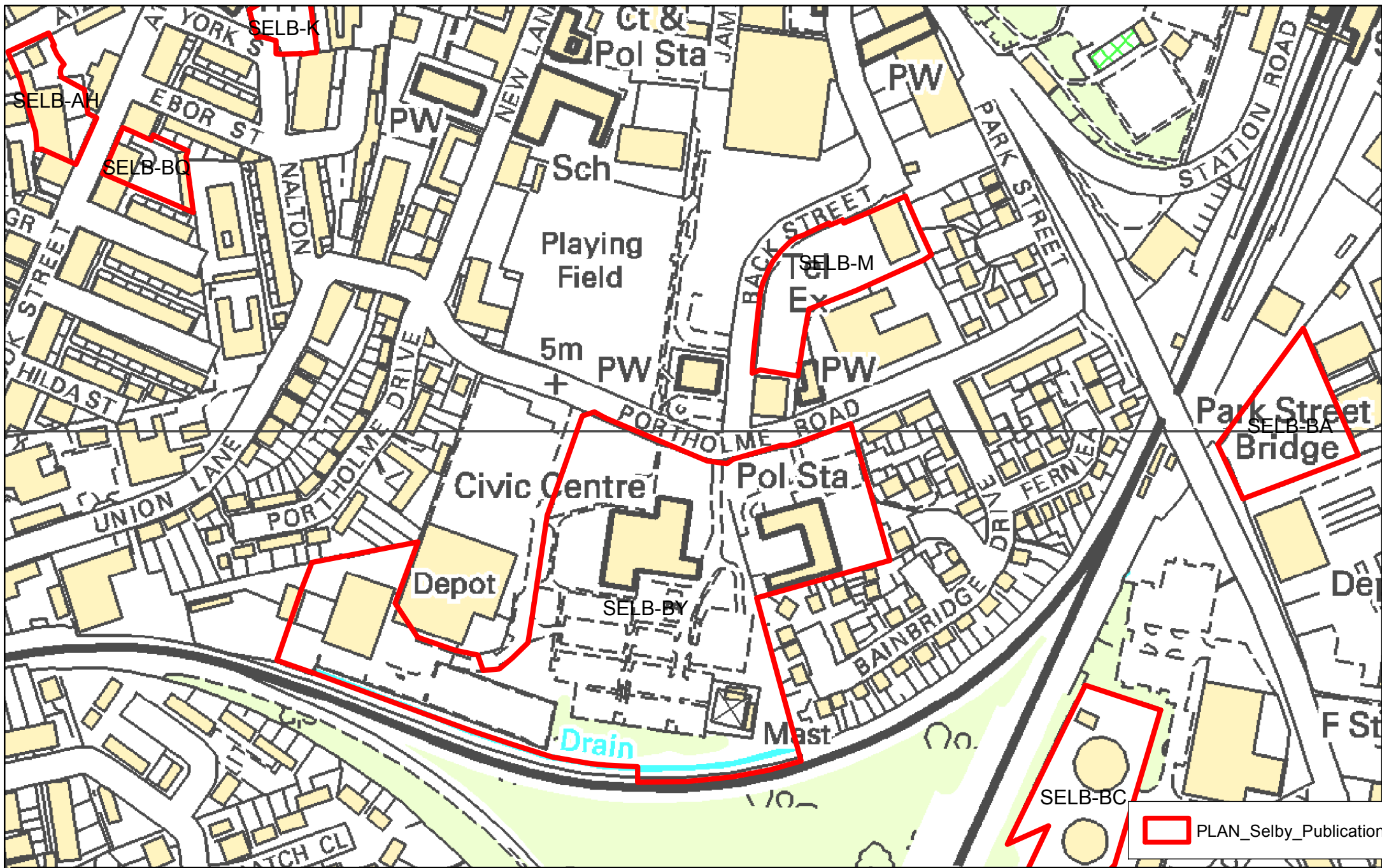




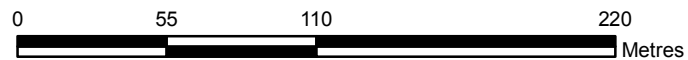


SELB-BX

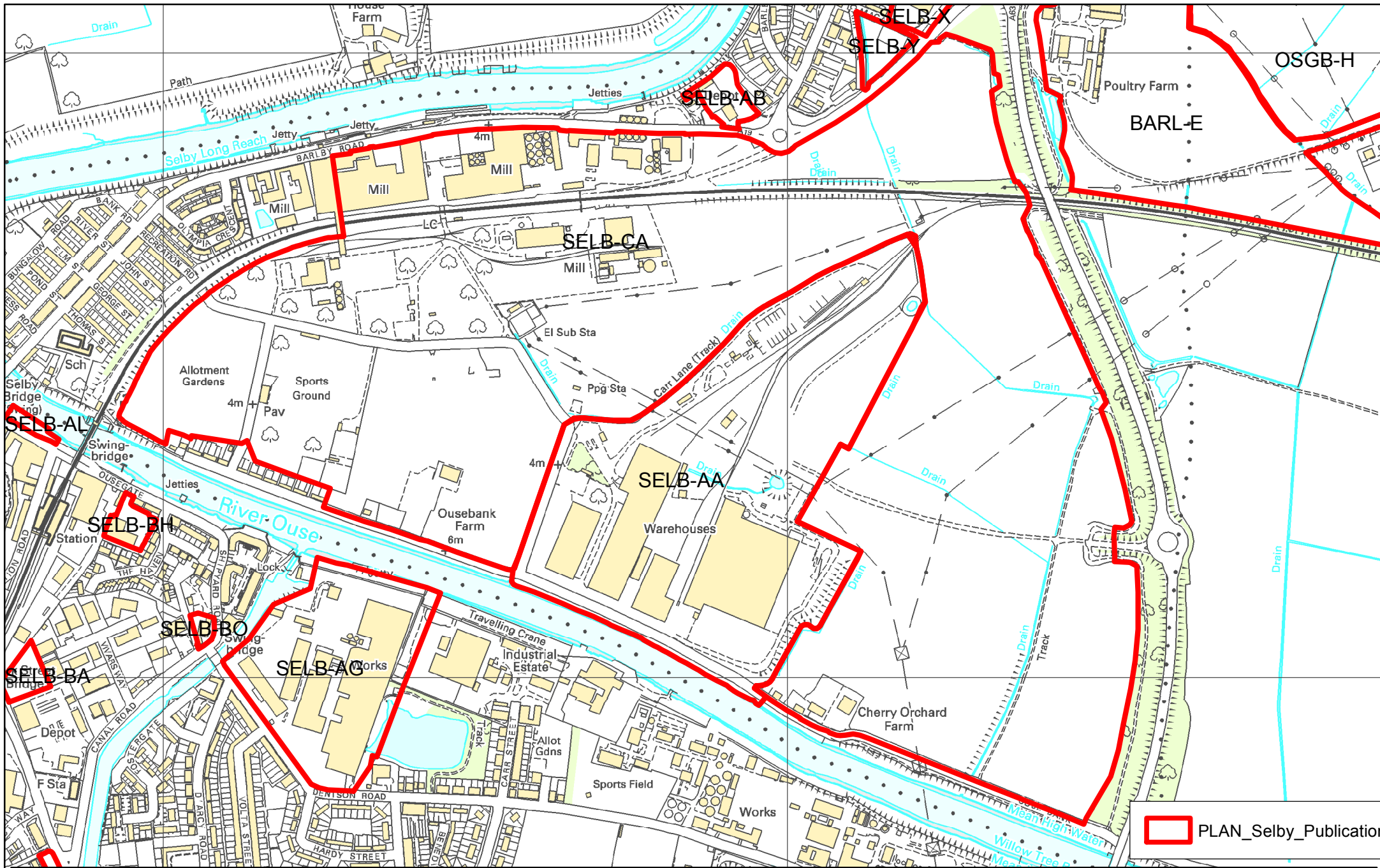




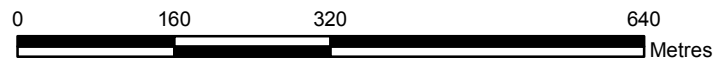
Olympia Park (Site SELB-CA)







Olympia Park (Site SELB-CA)



## Appendix 4: Site assessment criteria

ELR Criteria	Assessment options										Evidence base / data sources
<b>Market attractiveness</b>											
Market activity	Site is being actively marketed for employment uses and/or within an adjacent to existing operations estate	Evidence of marketing in the wider locality and/or site is in an established employment area or has been identified by agents as in an area of interest	No evidence of market activity at the site or in the locality, not identified by agents as being an area of interest								Desk top review of sites on the market Agent engagement as part of ELR local knowledge
Strategic accessibility	Site has good national accessibility	Site has good sub-regional accessibility	Site has good local accessibility	Site only poor local accessibility							As per 2.4 of PLAN Selby Methodology To include reference to the potential for rail access, e.g. adjacent to railway, and/or water if adjacent to a waterway. score not to be amended but to be noted in text
Road frontage		Site has a good road frontage (open aspect to majority of area)	Site has some road frontage / subject to some boundary screening	Site has no road frontage/heavy screening which it is unlikely to be acceptable to remove							Established through mapping / aerial / streetview images Not related to physical access, just visibility
Adjacent uses	Offices / Industrial / Warehousing	Residential	Retail	Hotel / Leisure	Community	Open space / Agricultural	Woodland	Energy / waste infrastructure	Waterway / railway	Highways infrastructure	To be confirmed via mapping / aerial / streetview images All relevant adjacent uses to be listed
Amenity impact		Proposed development replaces an existing use which has a negative amenity impact	Site within or adjacent to compatible uses	Site within incompatible area, however significant impacts can be mitigated	Site within incompatible area, and significant impacts cannot be mitigated						As per 2.24 of PLAN Selby methodology
Site located in an Assisted Area		Site located within an Assisted Area	Site not located within an Assisted Area								As per Assisted Area Map
OVERALL MARKET ATTRACTIVENESS	Site is likely to be attractive to the market		Site may be attractive to the market		Site unlikely to be attractive to the market						GVA judgement based on the criteria above
<b>Site Constraints</b>											
Physical / infrastructure constraints			No known constraints	Major infrastructure constraints exist but affect only a small part of the site	Major constraints which are difficult to mitigate or affect a large portion of the site (e.g. a collection of minor constraints which heavily affect the site)						As per 2.12 of PLAN Selby methodology
Physical point of access		Existing access into the site is either adequate or requires upgrade works	Access can be created within the landholding (or through third party land) and an agreement is in place	Access can be achieved through third party land but an agreement is not in place	No apparent means of creating an access						As per 2.23 of PLAN Selby methodology
Contamination		Development is not located on or adjacent to land that is likely to be contaminated	Development has the potential to be affected by contamination due to the site being adjacent to a contaminated site	Development is located on or adjacent to land that is highly likely to be contaminated, but this can be mitigated	Development located on land that is highly likely to be contaminated, and cannot be remediated						As per 2.26 of PLAN Selby methodology
SIGNIFICANT DEVELOPMENT CONSTRAINTS	No significant development constraints		Potentially significant development constraints		Significant development constraints		Site for specific occupier				GVA judgement based on the criteria above HV cables seen as significant, other cables seen as not significant Potentially contaminated on site is seen as a potentially significant constraint Contamination on site (off-site/likely) is seen as a significant constraint Large or significant structures on site requiring clearance seen as significant Standard requirements for a new junction or local road widening to achieve site access - not seen as significant No access clearly achievable - seen as significant Need for highway upgrade works in locality - seen as potentially significant
<b>Strategic Support</b>											
Consistency with Selby Economic Strategy / Core Strategy	Site is identified as an Existing or Potential Employment Site in the Selby Economic Strategy or a Strategic Site in Core Strategy		Site is not identified as an Existing or Potential Employment Site in the Selby Economic Strategy or a Strategic Site in Core Strategy								Reference to Core Strategy and Draft Economic Strategy August 2016 - Appendix 2, Figure F
Consistency with LCR SEP2 / York, NY & ER LEP SEP	Site is identified as a Strategic priority in SEP		Site is not identified as a strategic priority in SEP								Reference to LCR SEP2 - page 38 Reference to YNYER SEP - pages 84, 138-140
<b>Potential occupiers</b>											
Options for B uses	B1a	B1b	B1c	B2	B8						All relevant uses to be listed
Optimum Market Segment	Office Locations	General Industrial / Business Areas	High Quality Business Parks	Warehouse & Distribution Parks	R&D / Advanced Manufacturing	Heavy / Specialist Industrial Sites	Incubator / SME Cluster Sites	Specialised Freight Terminals eg aggregates, road, rail, wharves, air	Recycling / Environmental Industries Sites	Sites for Specific Occupiers	GVA judgement As per market segments table on spreadsheet tab - to be coloured blue where a site is identified as being for a specific occupier for ease of identification
Growth Zones in Selby Economic Strategy	Manufacturing / Logistics	Agri-Tech / Bio-renewables	Creative / Media	Energy							Reference to Draft Economic Strategy August 2016 - page 15 Figure 6 Site may fall into more than one growth zone
Scale of occupier	Local occupier (in or outside of Selby)	Inward Investor		Both local occupier and Inward Investor							GVA judgement
<b>Availability &amp; deliverability</b>											
Availability considerations & Impact of active use	Ownership status of the site	Is the site in active use?									As per 3.1 of PLAN Selby methodology
Site viability and Abnormal Costs	Has an option been marketed or had developer interest?	Has an option been agreed?	Has a viability study been undertaken for the site?	Issues such as abnormal costs to the development of a site	Any other studies that have been submitted in support of the site						As per 3.2 of PLAN Selby methodology (makes reference to 2015 ELR)
Likely economic viability	Likely to be economically viable		May be economically viable		Unlikely to be economically viable						GVA judgement. To be assessed based on conclusions as to overall market attractiveness, significant development constraints, and PLAN Selby deliverability testing
<b>SITE CONCLUSIONS</b>											
OVERALL SITE CONCLUSION	Site considered appropriate for employment development		Site may be appropriate for employment development		Site not considered appropriate						To be considered based on the above assessment
OPTION FOR ALLOCATION & RATIONALISATION	OPTION FOR ALLOCATION	RECOMMEND NOT CONSIDERED FURTHER									To be considered based on the above assessment

## Appendix 5: Market segments

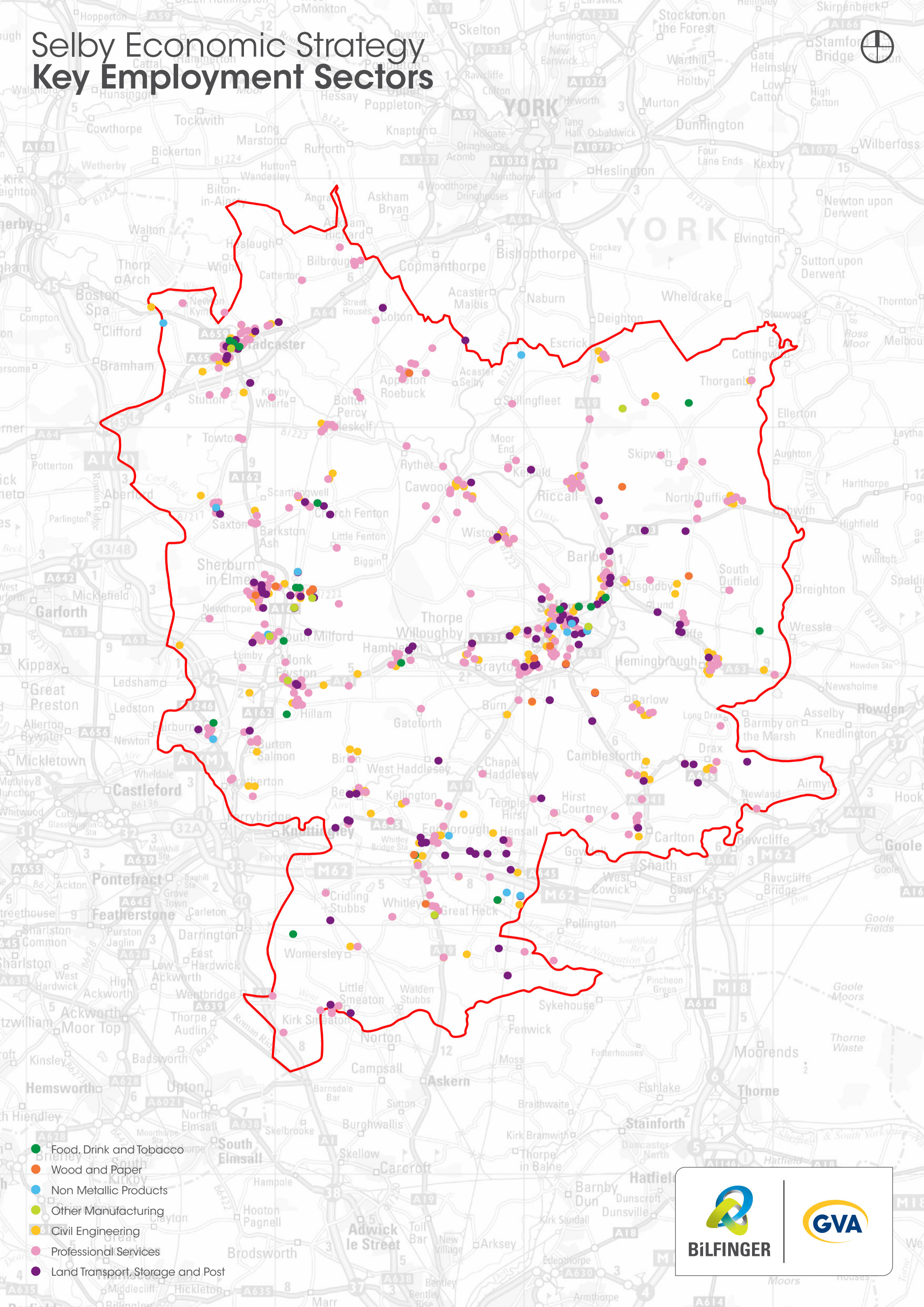
Potential Employment Market Segment	Definition
Office Locations	Sites and premises, predominately in or on the edge of town and city centres, already recognised by the market as being capable of supporting pure office (or high technology R&D/business uses).
General Industrial/Business Areas	Coherent areas of land which are, in terms of environment, road access, location, parking and operating conditions, well suited for retention in industrial use. Often older, more established areas of land and buildings. A mix of ages, qualities and site/building size.
High Quality Business Parks	These are likely to be sites, no less than 5ha but more often 20ha or more, already occupied by national or multi-national firms or likely to attract those occupiers. Key characteristics are quality of buildings and public realm and access to main transport networks. Likely to have significant pure office, high office content manufacturing and R & D facilities. Includes 'Strategic' inward investment sites.
Warehouse & Distribution Parks	Large, often edge/out of town serviced sites located at key transport interchanges.
R&D / Advanced Manufacturing	Usually office based developments, which are strongly branded and managed in association with academic and research institutions. They range from incubator units with well developed collective services, usually in highly urban locations with good public transport access to more extensive edge/out of town locations.
Heavy/Specialist Industrial Sites	Generally large, poor quality sites already occupied by or close to manufacturing, and processing industries. Often concentrated around historic hubs such as ports, riverside and docks.
Incubator/SME Cluster Sites	Generally modern purpose built, serviced units.
Specialised Freight Terminals eg aggregates, road, rail, wharves, air	These will be sites specifically identified for either distribution ; will include single use terminals eg aggregates.
Recycling/Environmental Industries Sites	Certain users require significant external storage. Many of these uses eg waste recycling plants can, if in modern premises and plant, occupy sites which are otherwise suitable for modern light industry and offices. There are issues of market and resident perceptions of these users. Some sites because of their environment (eg proximity to heavy industry, sewage treatment works etc) may not be marketable for high quality employment uses.
Sites for Specific Occupiers	Generally sites adjoining existing established employers and identified as principally or entirely intended for their use.

## Appendix 6: IDBR business mapping



# Selby Economic Strategy

## Key Employment Sectors



- Food, Drink and Tobacco
- Wood and Paper
- Non Metallic Products
- Other Manufacturing
- Civil Engineering
- Professional Services
- Land Transport, Storage and Post

