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Planning. Design. Economics.



Brentwood Economic Futures 2015-2030



Executive Summary
December 2014

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This report has been prepared by Nathaniel Lichfield & Partners (NLP) on behalf of Brentwood Borough Council to update the economic evidence base for the Brentwood Local Development Plan (LDP). It follows the earlier Heart of Essex Economic Futures work also prepared by NLP in 2012.

The study provides economic forecasts for Brentwood Borough Council for the period 2015/16 to 2029/30 for three alternative scenarios. The study then assesses future space needs for B class employment uses (offices, industry and warehousing) implied by the various growth scenarios, and considers the balance of demand and supply for employment land in the Borough. It also provides a high level job capacity analysis of identified potential employment sites. Finally, the study considers potential policy approaches in relation to employment space for the Brentwood Borough Local Plan. It should be noted, however, that the study does not comprise a full employment land review.

The findings of the study are as follows:

- 1 Brentwood has recorded strong levels of job growth over the last 17 years (30%); the number of B Class jobs has increased by 40% over this period. Employment growth in Brentwood has been driven by consumption sectors including residential care and social work, business services, education, healthcare and construction while job losses have been recorded within public administration and defence, utilities, accommodation and food services and retail. Notably, office-based activities dominated B Class growth.
- 2 Three different scenarios of future economic growth have been considered for the period 2015/16 to 2029/2030, based on a labour demand approach which reflects economic growth forecasts and potential housing growth scenarios. These scenarios include: a baseline scenario; a scenario based on the Council's objectively assessed housing need; and, a scenario which considers this objectively assessed housing need including an uplift to account for shortfalls over the period 2012-2015 before the Local Plan is adopted.
- 3 The overall job growth associated with these scenarios range from 5,750 jobs to 7,440 jobs over the period 2015/16 to 2029/30. The growth of B Class jobs range from 1,930 jobs to 2,570 jobs. Each of these scenarios indicates a lower level of future job growth in Brentwood than has been achieved in the recent past.
- 4 The significant majority of job growth under each scenario is expected to be for office-based jobs, with some additional distribution jobs and with an anticipated decline in manufacturing jobs.
- 5 The overall space requirements related to future scenarios range from 90,040sqm to 109,950sqm of all types of B Class employment space over a 15 year period from 2015. This implies a need for between 18.45

hectares and 22.75 hectares of employment land. Land for warehousing and distribution comprises the greatest requirement, followed by offices, with only limited additional land for manufacturing/ light industrial uses required. This implies a need for between -2.3ha and 40.1ha of employment land in overall terms.

- 6 The Local Plan Preferred Options proposes to re-allocate 18.9 hectares of existing employment land for other land uses including housing. Should this emerge as the preferred option, incorporating the replacement of these losses in their entirety on a like-for-like basis would increase future employment land requirements to between 37.35 and 41.65 hectares.
- 7 Based on the total supply of employment space identified as available (sites with extant planning permissions, existing allocations carried forward and proposed site allocations), in quantitative terms the Borough would have sufficient land to meet future needs up to 2030 under the three growth scenarios assessed in this study. Circa 65% of new allocations relate to land proposed for allocation at Brentwood Enterprise Park.
- 8 High level job capacity analysis suggests that identified employment sites have the potential to accommodate 5,035 jobs. This implies that capacity far exceeds the requirement as indicated by each of the scenarios under consideration as part of this study. The majority of the job capacity (86%) relates to proposed allocations including Brentwood Enterprise Park.
- 9 A review of the Council's proposed site allocations and policies for employment and the economy as contained in the Local Plan 2015-2030 Preferred Options document indicates that the Council should give consideration to:
 - identifying, assessing and allocating additional sites to increase choice and widen the portfolio of potential sites having regard to market signals, and to help mitigate against the risks associated with relying on one major site (Brentwood Enterprise Park) to meet the majority of B Class needs;
 - investigating the basis on which replacement employment land needs to be provided to offset land proposed to be re-allocated for housing, including the type and scale of requirements reflecting the current mix and profile of existing businesses that operate on sites which will be impacted by the Plan; and,
 - assembling an overall employment land trajectory to determine the current availability of sites for office and industrial uses over the short, medium and long-term (structured broadly in five year periods), based on the latest information on the potential deliverability of sites which comprise the Borough's portfolio of employment land.



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