Thurrock EDNA: Update

Thurrock Council

August 2025

Part of

Report completed/submitted by:	Zoe Crampton
Proof check completed by:	Aakash Pinto
Date:	17.09.25
Report reviewed by:	Margaret Collins
Date:	05.08.25

Contents

1 Introduction

1.1 ekosgen, part of GC Insight, have been commissioned by Thurrock Council to prepare an update to the 2023 Economic Development Needs Assessment (EDNA) to support the evidence base required for the Regulation 19 Local Plan.

1.2 The updated Assessment is required to ensure the evidence base covers the entire Local Plan period (2024 to 2044), as well as to take account of new data and employment projection releases, policy updates, property market conditions and employment land supply updates.

1.3 This update should be read alongside the 2023 EDNA, as well as the updated ELAA (2025, Aspinall Verdi) and the Thames Freeport Scoping Study (2025, ekosgen, part of GC Insight).

1.4 The Study has been prepared in the context of the National Planning Policy Framework (NPPF), which sets out Government policies for planning, and Planning Practice Guidance on Housing and Economic Development Needs Assessments and Housing and Economic Land Availability Assessments. The Planning Practice Guidance (PPG) sets out how studies such as this should be undertaken. The Labour Government have made changes to the NPPF (December 2024) since the 2023 EDNA was published. This update takes account of these changes.

1.5 The key objectives of the updated Assessment are to:

- Provide an update to the socio-economic baseline position drawing on the most recent data releases that have been published subsequent to the 2023 EDNA.
- Provide an up-to-date assessment of the potential future requirements for employment floorspace and land taking into account the most recently available employment projections and update the timeframe of the assessment to cover the future plan period of 2024 to 2044.
- Provide an update to recommendations for how Thurrock can support the growth of key sectors and ensure that the supply of strategic employment land is aligned with demand.

1.6 As with the 2023 EDNA, the focus of the updated Assessment is on the following floorspace and land use categories:

- Office: E(g)(i) and E(g)(ii)
- Industrial: E(g)(iii) and B2
- Storage and distribution: B8

The Functional Economic Market Area (FEMA)

1.7 For the purposes of the updated Assessment, it is assumed the Functional Economic Market Area (FEMA) remains unchanged from the 2023 EDNA as the passage of time between the preparation of the two assessments has not been sufficient to warrant revisiting all data that supported its definition. As a sense check to this, more recently available migration and Travel to Work data from the 2021 Census, that wasn't available for the purposes of the 2023 EDNA, has been reviewed and confirms that the FEMA definition remains valid. On this basis, the following local authority areas form part of the Thurrock FEMA:

- Thurrock
- Southend-on-Sea

- Castle Point
- Rochford
- Basildon
- Brentwood
- LB Havering
- LB Barking and Dagenham

Report Structure

1.8 The remainder of this report is structured as follows:

- The current economic position and socio-economic context within Thurrock and the FEMA **(Chapter 2)**.
- An updated local and wider policy context **(Chapter 3)** incorporating recent changes to national, regional, and local policies and strategies.
- Scenarios of future demand for employment space in Thurrock **(Chapter 4)** based on updated projections of employment, population and take-up data.
- The conclusions and recommendations of the updated EDNA are to be considered by Thurrock Council. **(Chapter 5)**.

2 Socio-economic Baseline

2.1 This section provides an understanding of the current economic drivers and trends across Thurrock and the strengths and weaknesses of its economy and recent trajectory which underpin future demand for employment land and floorspace. It takes into account available new data releases since the 2023 EDNA was published. Data is presented at geographic levels consistent with the 2023 EDNA as follows:

- Thurrock
- ASELA (Thurrock, Basildon, Southend-on-Sea, Rochford, Castle Point, Brentwood)
- FEMA (ASELA plus LB Havering and LB Barking and Dagenham)
- Greater Essex
- England

National Outlook

2.2 The first half of the 2020s have been characterised by a number of shocks that have had major impacts across the world. The period has included multiple years of the COVID-19 coronavirus pandemic and associated lockdowns (2020-2023), an energy and cost-of-living crisis (2021) and a global increase in interest rates (2022). These shocks have reverberated, and continue to do so, across the UK economy and have led to the sharpest rise in energy costs since the 1970s and the steepest sustained rise in borrowing costs since the 1990s. These are linked to wider challenges facing the UK, including an ageing society and increasing demands to increase spending on defence in response to rising global geopolitical tensions over recent years. In early 2025, the introduction of new tariffs by US President Donald Trump has had significant impacts on global markets and presents uncertainty over future trade arrangements for businesses throughout the world. Together, these events and ongoing challenges present a challenging social and economic environment.

2.3 A new Labour Government was elected in the UK in July 2024, marking the first change in the Government political party for the first time since 2010. The party's election manifesto was focused on achieving 'change', with the priority mission of the Government set as 'growing the economy'. The first year of the new Government has though achieved limited growth, against a backdrop of challenging economic circumstances both in the UK and globally.

2.4 The Autumn Budget 2024 was presented by the Chancellor of the Exchequer Rachel Reeves on 30 October 2024. The Budget included tax rises worth £40bn to fund a range of public services, including the NHS, and followed a debate between political parties about the in-year overspend position of the previous government. A range of taxes were increased, including rates of capital gains tax, employers' national insurance contributions, and the stamp duty surcharge paid on second home purchases.

2.5 At the time of the Budget, the Office for Budget Responsibility (OBR) predicted that budget policies would increase UK borrowing by an average of £32.3bn over the next five years, while it also predicted the UK economy would grow by 2% in 2025 and 1.8% in 2026. Since the Budget, the OBR's predictions on growth in the UK economy have been downgraded, with GDP growth only expected to reach 1% in 2025 as of the Office's economic and fiscal outlook in March 2025.[1] The forecasts did though upgrade growth predictions for the years through to the end of the Parliament, with growth of 1.9% forecast in 2026, followed by 1.8% in 2027, 1.7% in 2028, and 1.8% in 2029. More recently and following the introduction of new trade tariffs by US President Donald Trump, the International Monetary Fund has downgraded its growth forecasts for the majority of countries around the world, citing "the direct effects of the new trade measures and their indirect effects through trade linkage spillovers, heightened uncertainty, and deteriorating sentiment".[2] Under the forecast, global growth is projected to fall from an estimated 3.3% in 2024 to 2.8% in 2025, before rising to 3% in 2026.

2.6 Data from the ONS indicates that employment in England, as of 2023, stood at around 28.2 million jobs[3] and in 2023 the value of the economy was estimated to be £1.9 trillion[4]. Between 2009 and 2023, total employment increased by around 4.0 million jobs (or +16%)[5], whilst the growth in the value of the economy (as measured by GVA at current prices) increased by 28%.

2.7 According to the Bank of England in February 2025[6] twelve-month consumer price index (CPI) inflation remains above the Monetary Policy Committee's 2% target but has reduced considerably from its peak of nearly 8.5% in mid-2023.[7] The current inflation rate is 2.6%, though this is expected to rise sharply in the short term to 3.7% in Q3 of 2025 as a result of higher global energy costs and regulated price changes, before it is then expected to fall to around the 2% target. The current Bank Rate is 4.5%, down by 0.25% from 4.75%.

2.8 Since the Bank of England's November 2024 Monetary Policy Report, GDP growth has been weaker than expected and indicators have shown a decline in business and consumer confidence. GDP growth is expected to be 0.4% in Q1 2025 (downgraded from a forecast in November of 1.4%), before rising to 1.5% in Q1 2026. Meanwhile, forecasts project the unemployment rate to rise gradually to 4.5% this year and 4.8% by 2027, slightly higher than previous forecasts.

Thurrock Economy

2.9 Since the 2023 EDNA was published, there have been updates to the following data sets which are included in this Assessment:

- Gross Value Added (GVA) with data for 2022 now available (2019 data used in the 2023 EDNA)

[1] Economic and fiscal outlook – March 2025 - Office for Budget Responsibility

[2] World Economic Outlook, April 2025: A Critical Juncture amid Policy Shifts (Page 11)

[3] Business Register and Employment Survey - Office for National Statistics

[4] Regional gross value added (balanced) by industry: all ITL regions - Office for National Statistics

[5] Annual Employment Statistics (BRES), (2009) – Table 3: Region

[6] Bank of England Monetary Policy Report May 2024

[7] Monetary Policy Report - February 2025 | Bank of England

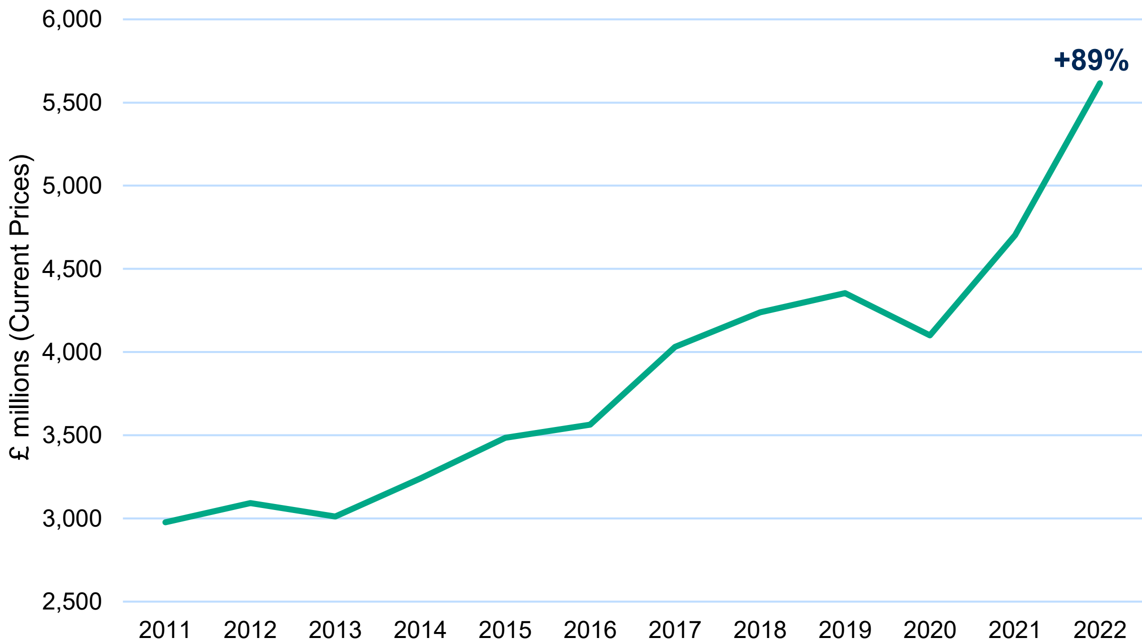
- Business Register and Employment Survey (BRES) work-place jobs data with 2023 data now available (2021 data used in the 2023 EDNA)
- ONS Business Counts Data with 2023 data now available (2022 data used in the 2023 EDNA)

2.10 It should be noted that updated data will not necessarily be directly comparable with data presented in the 2023 EDNA as previous years data are often re-based following the release of new data. For analysis which considers historical trends, this update therefore includes newly collated data for all previous years' data as well as the most recent data to take account of any re-basing.

GVA

2.11 In 2022, the Thurrock economy generated £5.6 billion of gross value added (GVA). Since 2011, Thurrock's overall GVA has increased by £2.6 billion, marking an 89% rise. However, it's important to note that Thurrock experienced setbacks during this period, with a 3% reduction in 2013 and a 6% reduction in 2020 due to the COVID-19 pandemic. Comparatively, the national GVA increased by 54% over the same period. Unlike Thurrock, the national increase has been reported consistently year on year.

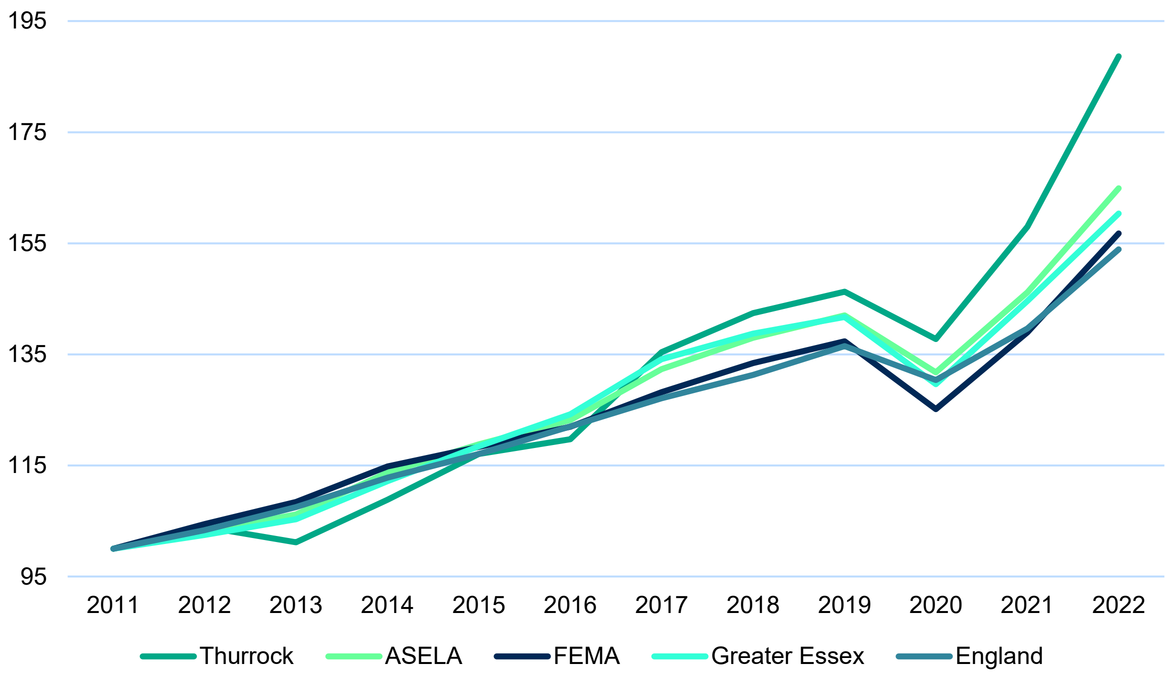
Figure 2.1: GVA performance over Time (Current Prices) In Thurrock



Source: ONS, 2022

2.12 Thurrock's GVA growth (+89%) over a decade surpasses both ASELA and FEMA areas by a significant margin, with an increase of 65% and 57%, respectively. However, Thurrock initially trailed behind these comparator areas from 2010 to 2017. Subsequently, it experienced a remarkable uplift of 16% annually, marking the most substantial yearly increase across all regions. The period between 2020 and 2022 witnessed an even more impressive surge, with a GVA growth spike of 51% in Thurrock.

Figure 2.2: Indexed GVA Growth



Source: ONS, 2022

GVA Contributions by Sector

2.13 Updated GVA data indicates that Thurrock remains an important economic location in the Greater Essex region accounting for around 9% of the regions overall GVA production in 2022. **Table 2.1** below shows the top 10 GVA producing sectors and indicators the largest sectors are wholesale and retail (£1.7bn), transportation and storage (£888m) and real estate (£575m), collectively accounting for just more than half of the overall GVA for Thurrock. The largest GVA producing sectors in Thurrock vary substantially from those of the wider ASELA, FEMA and Greater Essex with double the proportion of contribution from the wholesale and retail trade and a substantially higher proportion of GVA from the transport and storage sectors, emphasising the ongoing importance of the Ports and associated activities in Thurrock.

Table 2.1: Top 10 GVA Producing Sectors

Sector	GVA	%			
	Thurrock	Thurrock	ASELA	FEMA	Greater Essex
Wholesale and retail trade; repair of motor vehicles	1,664	30%	15%	15%	14%
Transportation and storage	888	16%	2%	7%	6%
Real estate activities	575	10%	2%	17%	17%
Construction	494	9%	13%	12%	12%
Manufacturing	391	7%	13%	10%	9%
Administrative and support service activities	261	5%	2%	6%	6%
Human health and social work activities	246	4%	17%	8%	8%
Professional, scientific and technical activities	237	4%	5%	6%	6%
Education	230	4%	5%	5%	6%
Public administration and defence	188	3%	4%	3%	4%

Source: ONS, 2022

Productivity

2.14 As a measure of productivity an update of GVA per Full Time Equivalent (FTE) indicates that the most productive sector in Thurrock remains as Real Estate activities (Table 2.2). However, this is not followed by professional, scientific and technical activities and wholesale and retail trade, both of which were previously outside of the top four productive sectors in Thurrock presented in the 2023 EDNA. The average GVA per FTE for Thurrock has increased from £80,000 GVA per FTE to £95,000 GVA per FTE and remains above the national average of £87,000 GVA per FTE.

Table 2.2: GVA per FTE, 2022

Sector	GVA per FTE current year
Real estate activities	£1,448,928
Professional, scientific and technical activities	£145,071
Wholesale and retail trade; repair of motor vehicles and	£144,123
Financial and insurance activities	£136,507
Manufacturing	£132,161
Agriculture, mining, electricity, gas, water and waste	£93,698
Construction	£87,632
Human health and social work activities	£82,563
Information and communication	£59,703
Transportation and storage	£58,682
Education	£57,419
Public administration and defence	£56,991
Administrative and support service activities	£55,384
Accommodation and food service activities	£36,906

Source: ONS, 2022 and BRES, 2022

Workplace-based Employment

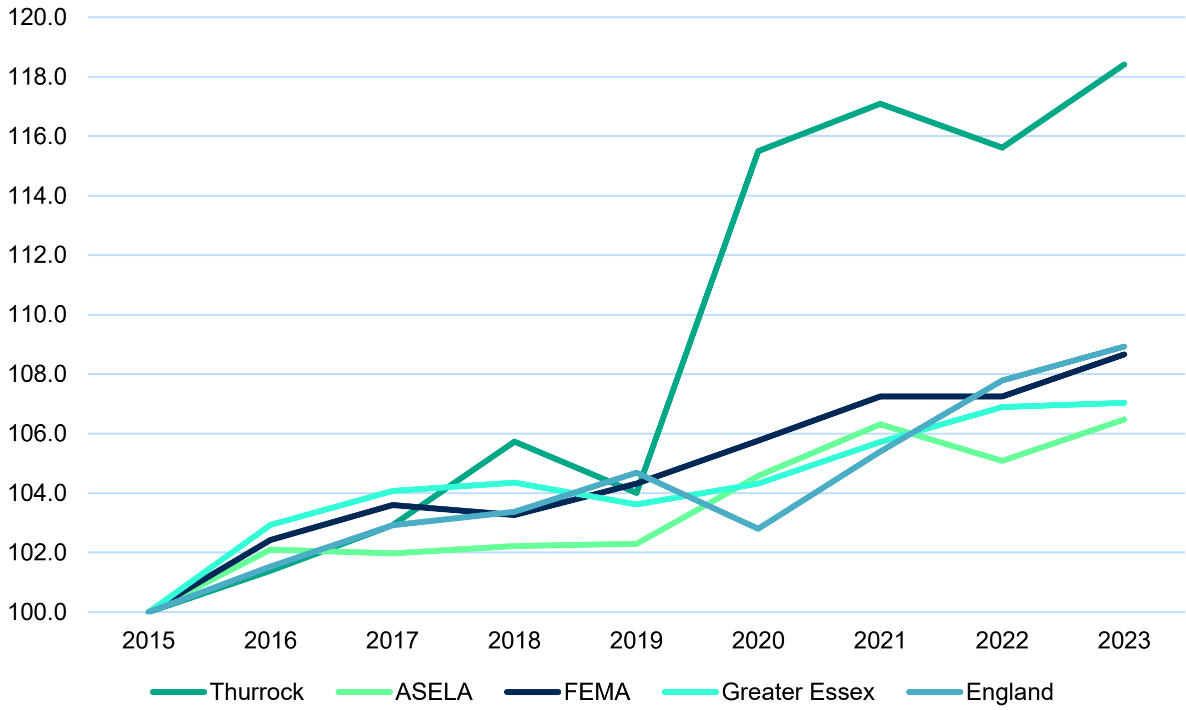
2.15 Total employment in Thurrock stood at 76,505 in 2023[8] and Thurrock remains as one of the major employment hubs within both the FEMA and ASELA areas. Thurrock's overall employment figure represents approximately 16% of the FEMA's total employment base of 466,150 employees and 24% of the ASELA area's employment base of 314,930 which remains in line with the analysis in the 2023 EDNA. Among FEMA local authorities, Basildon and Havering surpass Thurrock in terms of total employment base, with over 16,000 and 15,000 more jobs, respectively.

2.16 Since the 2023 EDNA was published there has been very little change in the analysis of employment growth. Since 2015, Thurrock saw a notable surge in jobs, with a growth rate of +18% (+11,900 positions) (Figure 2.3). This rate outpaces the expansion seen in both the FEMA and Greater Essex regions, which stood at +9%, and significantly exceeds that of ASELA, at +6%. As depicted in Figure 2.3 below, Thurrock's employment landscape has been anything but uniform. Initially, there was a modest uptick of just 4% until 2019, followed by a substantial annual spike of 11% in 2020. This high growth owes much to the transport and storage sector,

[8] It should be noted that BRES data will not be directly comparable with that presented in the 2023 EDNA as previous data releases are often re-based when new data is released.

which witnessed a 111% increase (+10,000 jobs) over the years. In the period 2021 to 2022 there has been a small decline (-1.5%) but rebounded by 2.8% in 2023.

Figure 2.3: Indexed Total Employment Growth 2015-2023

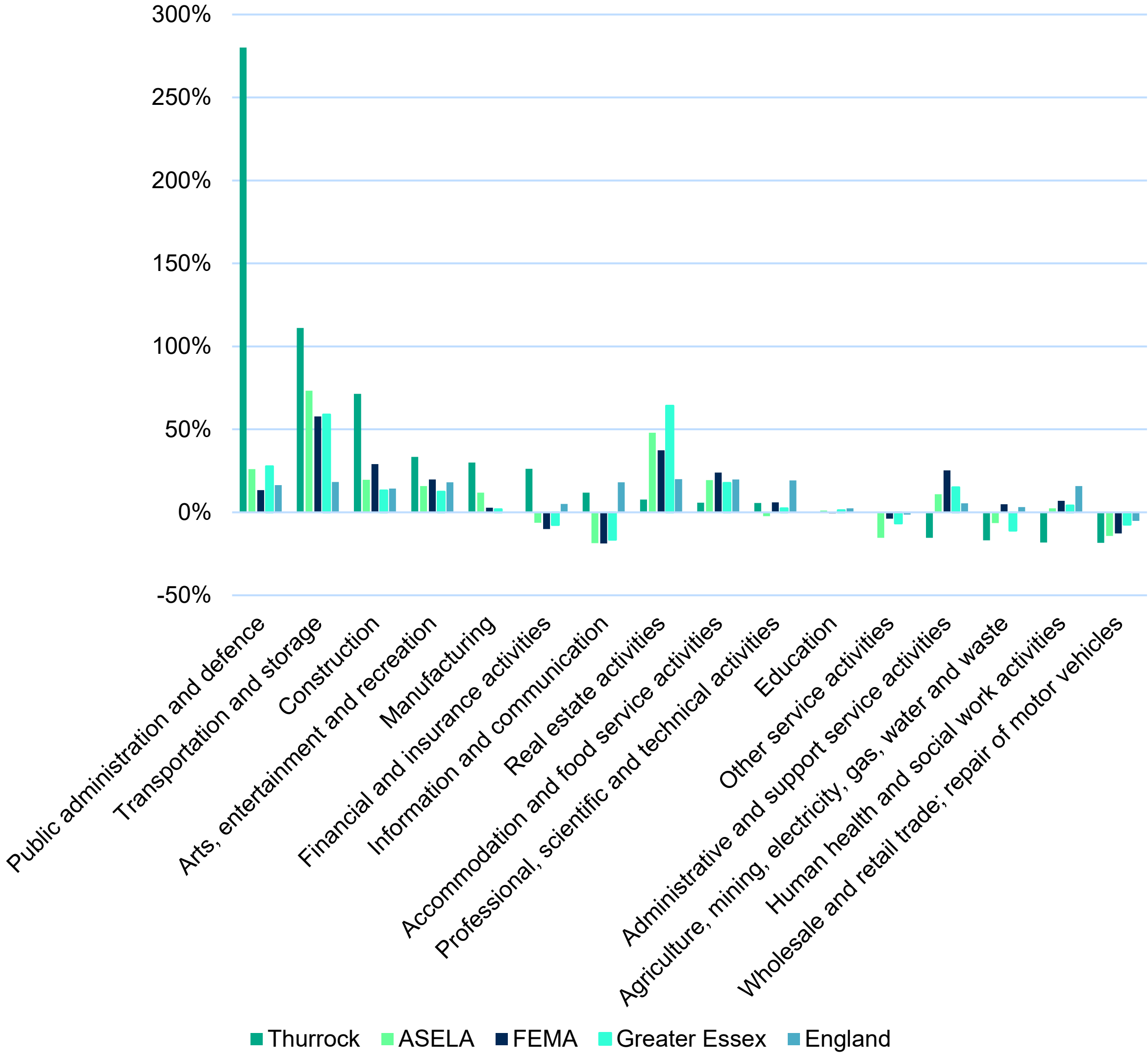


Source: BRES, 2023

2.17

Since 2015, Thurrock has witnessed robust growth across various sectors, with notable expansions seen in public administration and defence (+280%/+3,500), transport and storage (+111%/+10,000), and the construction industry (+71%/+2,500) (Figure 2.4). Conversely, several sectors have experienced a decline during the same period, including wholesale and retail, and health (-18% each), and professional, scientific, and technical activities (-15%), all seeing reductions in employment size.

Figure 2.4: Key Sector Employment Change, 2015 – 2023



Source: BRES, 2023

Broad Sector Summary

2.18 In 2023, Thurrock's employment landscape was dominated by two key sectors, collectively representing approximately 45% of all employment in the borough (Table 2.3). These sectors were wholesale and retail (20%) and transport and storage (25%). Not only is the transport and storage sector among the largest, but it has also experienced significant growth over the past eight years, adding 10,000 jobs. Currently, it holds a high level of specialization both nationally (with an LQ of 4.9) and within the FEMA (with an LQ of 2.7). However, since 2015, Thurrock has witnessed a reduction in employment across two of its major sectors, notably wholesale and retail (-3,500 jobs), with retail being one of its largest and most specialized industries.

Table 2.3: Broad Sector Summary: Total Employment, Specialisation and Trends

Sector	2023	% Total	Growth since 2015	LQ* vs FEMA	LQ* vs England
Agriculture, mining, electricity, gas, water and waste	1,255	2%	-255	1.3	0.7
Manufacturing	3,250	4%	750	0.7	0.6
Construction	6,000	8%	2,500	1.0	1.6
Wholesale and retail trade; repair of motor vehicles	15,500	20%	-3,500	1.3	1.5
Transportation and storage	19,000	25%	10,000	2.7	4.9
Accommodation and food service activities	4,500	6%	250	0.9	0.8
Information and communication	950	1%	100	0.5	0.3
Financial and insurance activities	600	1%	125	0.4	0.2
Real estate activities	700	1%	50	0.5	0.4
Professional, scientific and technical activities	2,375	3%	125	0.5	0.3
Administrative and support service activities	5,500	7%	-1,000	0.7	0.8
Public administration and defence	4,750	6%	3,500	1.7	1.5
Education	5,500	7%	0	0.8	0.9
Human health and social work activities	4,500	6%	-1,000	0.5	0.4
Arts, entertainment and recreation	1,000	1%	250	0.5	0.5
Other service activities	1,125	1%	0	0.7	0.7
Total	76,505		11,895	1.0	1.0

Source: BRES, 2023

2.19 **Note:** LQ is a measure of specialisation compared to England (i.e. a score of 2 represents a sector 2 times more specialised than nationally).

Business in Thurrock

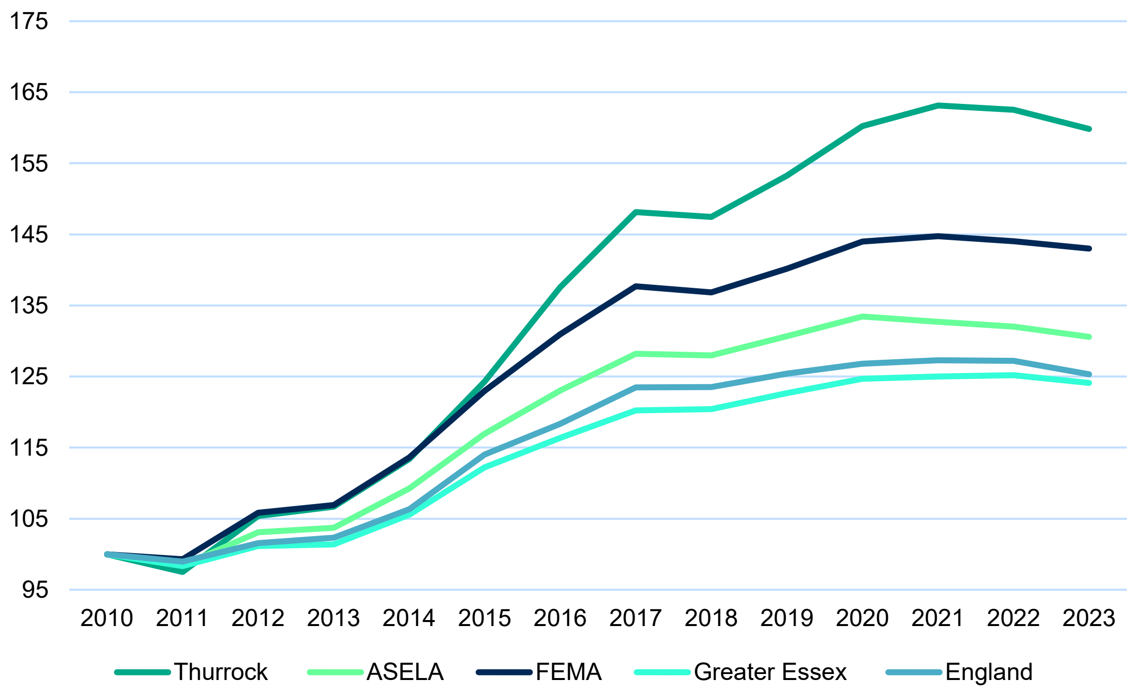
Business Characteristics

2.20 According to the latest available data on business counts, Thurrock housed just over 8,000 businesses in 2023. The business base in Thurrock accounts for around 14% of the overall business base within the FEMA (57,330) ranking it has the fourth largest behind Havering, Barking and Dagenham and Basildon, and 22% within ASELA (36,825) ranking it has the second largest behind Basildon.

2.21 It is important to note, that UK Business Count data does not include for businesses not registered for Value Added Tax (VAT) and/or PAYE and therefore may underestimate the number of businesses operating in Thurrock. Companies House data, which accounts for all business registrations, suggests that in 2024, there were 14,298 businesses currently operating in Thurrock indicating a very large number of businesses operate in Thurrock at the small end of the scale. Given that Companies House data is only available as a snapshot of the current business base, UK Business Count data will be used to analyse past trends.

2.22 Since 2010, Thurrock has experienced significant growth in its business community, with a 60% increase (+2,995 businesses) over a 13-year period (Figure 2.5). This level of growth far surpasses the national average of 25% and exceeds the growth observed in the FEMA, ASELA, and Greater Essex regions. While the annual business growth has generally been positive, there were three years of decline: -2% in 2011, -1% in 2018, and -2% in 2023, which mirrors the business growth trend observed in the ASELA catchment areas. Growth has been widespread across most sectors, with the exception of the public administration and defence sector (-38% decrease, -15 businesses) which experienced declines in business numbers. Notably, sectors such as transport and storage have seen significant expansion, with a surge of 178% (+865 businesses), followed by construction with a 107% increase (+870 businesses), and business administration with a notable 77% rise (+305 businesses).

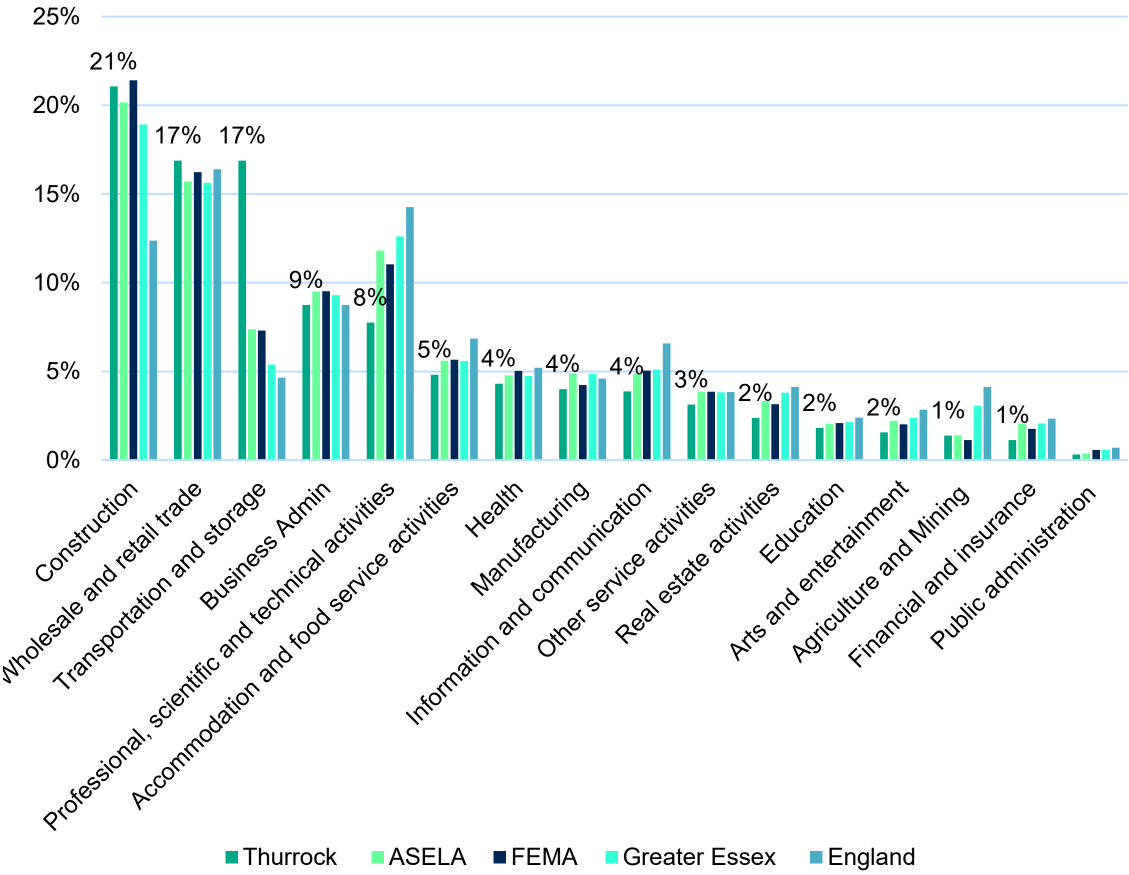
Figure 2.5: Indexed Business Growth (2010-2023)



Source: UK Business Counts, 2023

2.23 Within Thurrock's business landscape, three key sectors emerge, jointly constituting 55% of all businesses in the borough: wholesale and retail, transport and storage (17% each), and construction (21%) (Figure 2.6). Although Thurrock's business makeup mirrors that of the FEMA and ASELA regions, it's noteworthy that the transport and storage sector holds a significantly larger proportion of businesses within Thurrock.

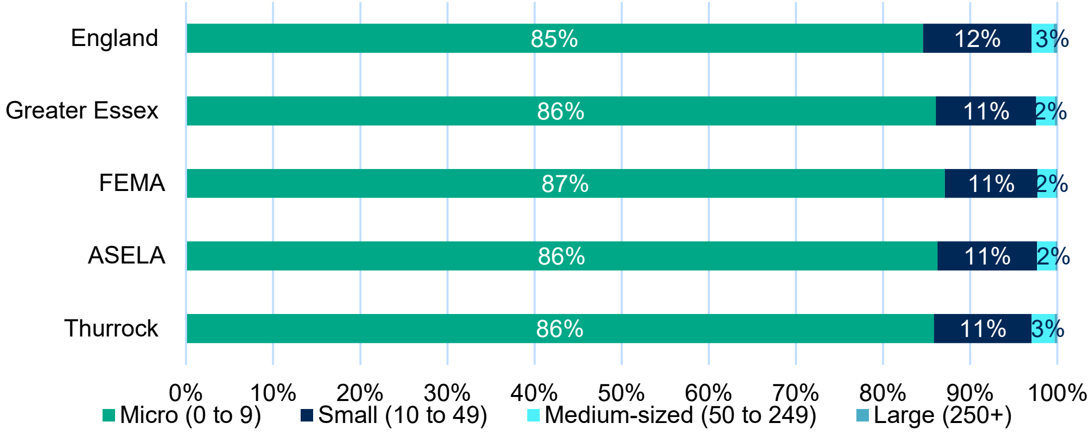
Figure 2.6: Proportion of Businesses by Sector, 2023



Source: UK Business Counts, 2023

2.24 The vast majority of businesses in Thurrock fall into the category of micro businesses (Figure 2.7), employing between 0 to 9 employees, comprising 86% of the total. This proportion aligns closely with those observed in ASELA, FEMA, and Greater Essex. Less than 1% of businesses in all geographies fall within the large category (250+ employees).

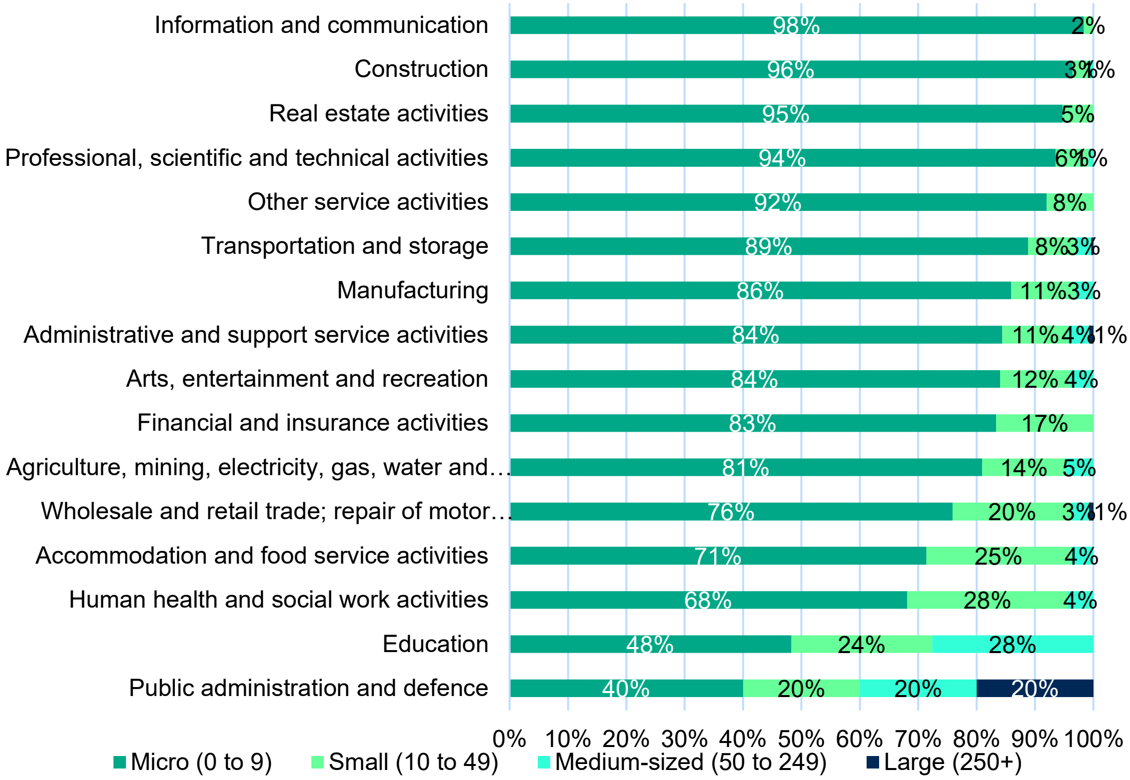
Figure 2.7: Business Sizes, 2023



Source: UK Business Counts, 2023

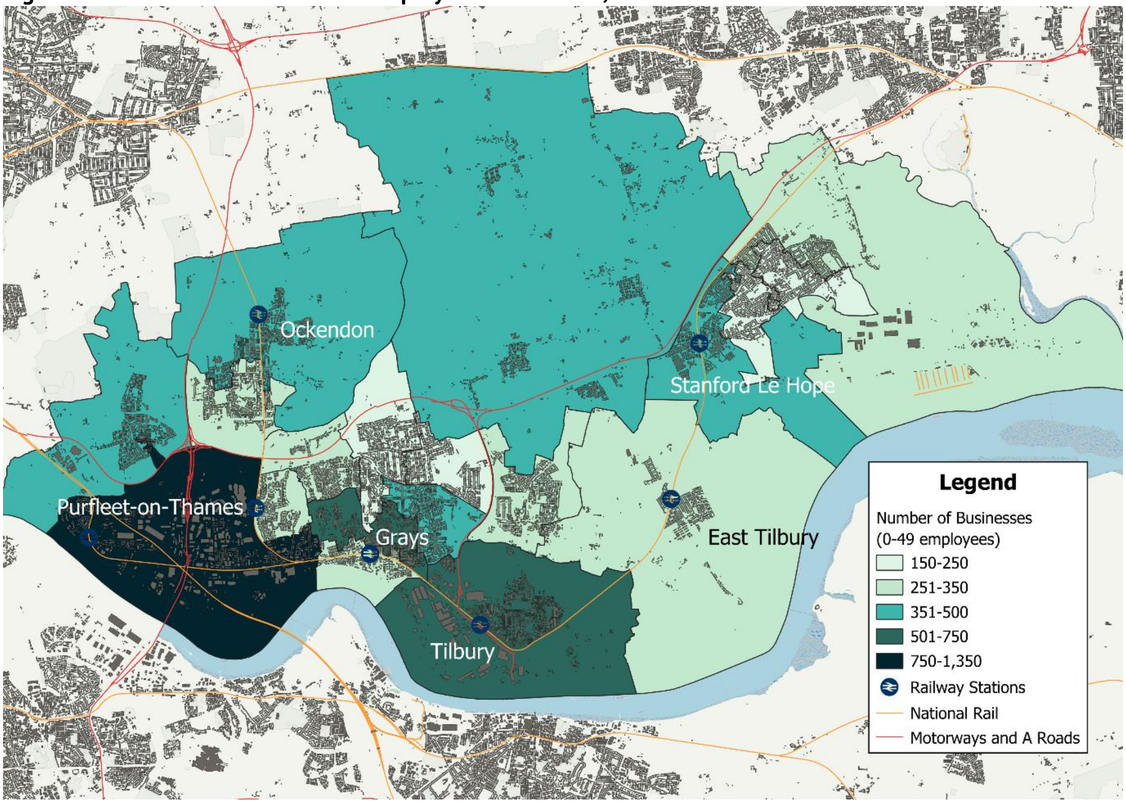
2.25 Whilst the majority of total businesses in Thurrock fall within the micro category, this does vary across different sectors (Figure 2.8). In the Public Administration sector, only 40% of businesses employ up to nine people, while the ICT sector is largely comprised of businesses with fewer than nine employees.

Figure 2.8: Business Size by Sector, 2023



Source: UK Business Counts, 2023

Figure 2.9: Businesses with 0 to 49 employees in Thurrock, 2023

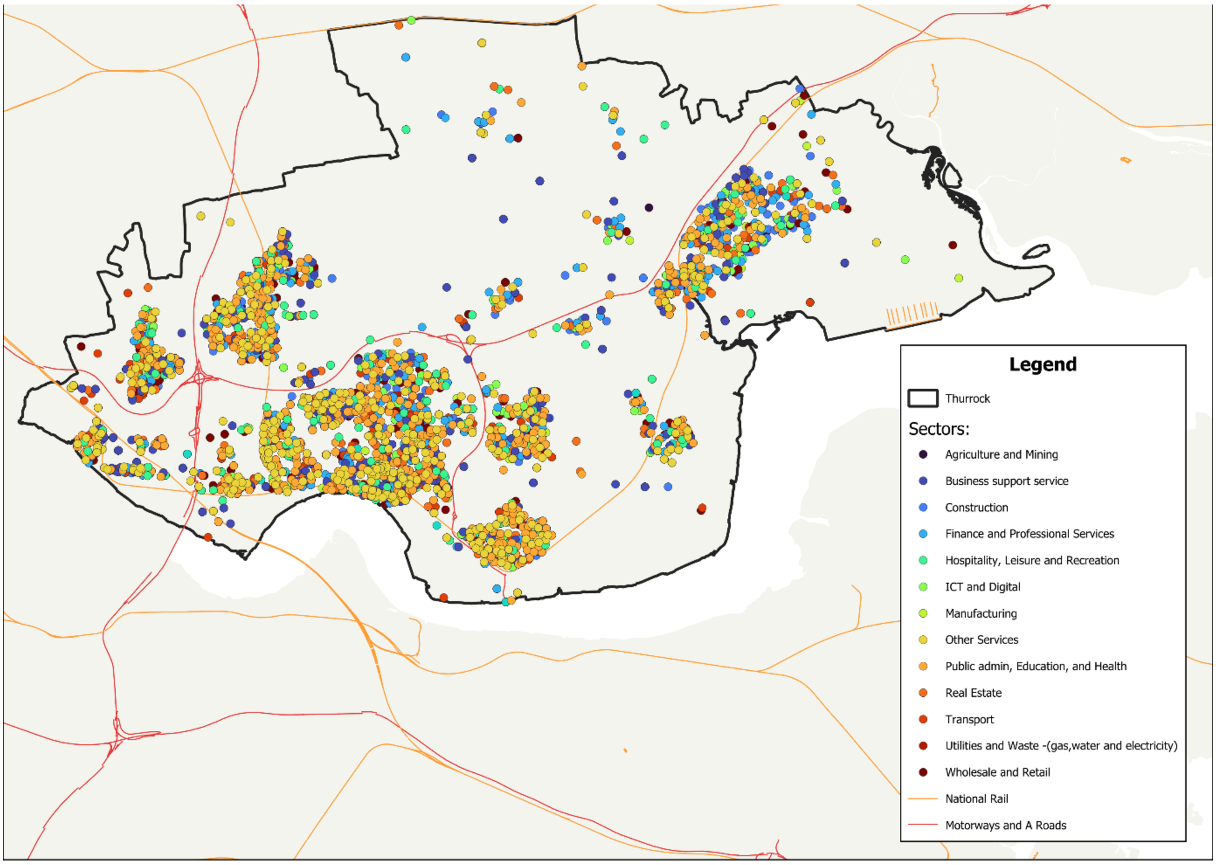


Source: UK Business Counts, 2023

2.26 It can be seen from Figure 2.9 that the largest concentrations of small businesses (0 – 49 employees) are in Purfleet-on-Thames and West Thurrock (1,350 businesses) along the river Thames. Grays Town and Tilbury also have a large amount of small and medium-sized businesses.

2.27 As displayed in figure 2.10 overleaf, there are clear clusters of business activity, with the majority of businesses located south-central within the borough, particularly around Grays Town and Tilbury. This reflects the large sized business and retail parks located towards the south with Lakeside, West Thurrock and Tilbury docks both occupying a large proportion of business share. In addition, there is a cluster in the east along the A13 corridor at Stanford Le Hope and Ockendon.

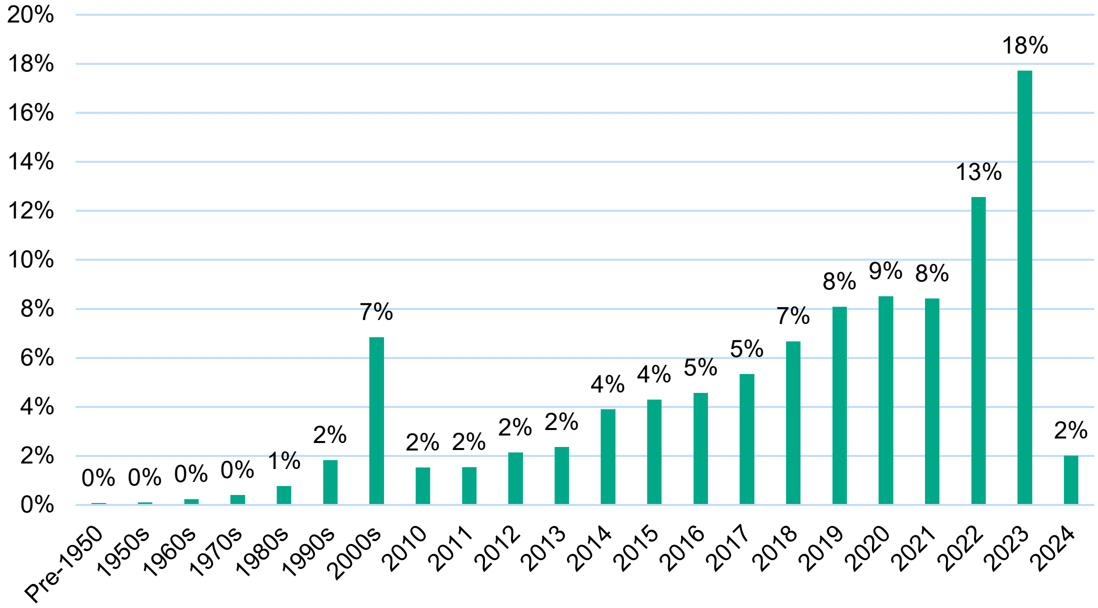
Figure 2.10: Location of Businesses in Thurrock



Source: Companies House, 2024

2.28 Thurrock's business environment is characterised by a significant presence of newly established ventures, with about 33% of businesses formed between 2022 and 2024, and 58% within the last five years (Figure 2.11). This dynamic landscape mirrors the substantial employment growth witnessed in Thurrock recently, indicating a potential need for support services and additional space to accommodate the expansion of these emerging enterprises.

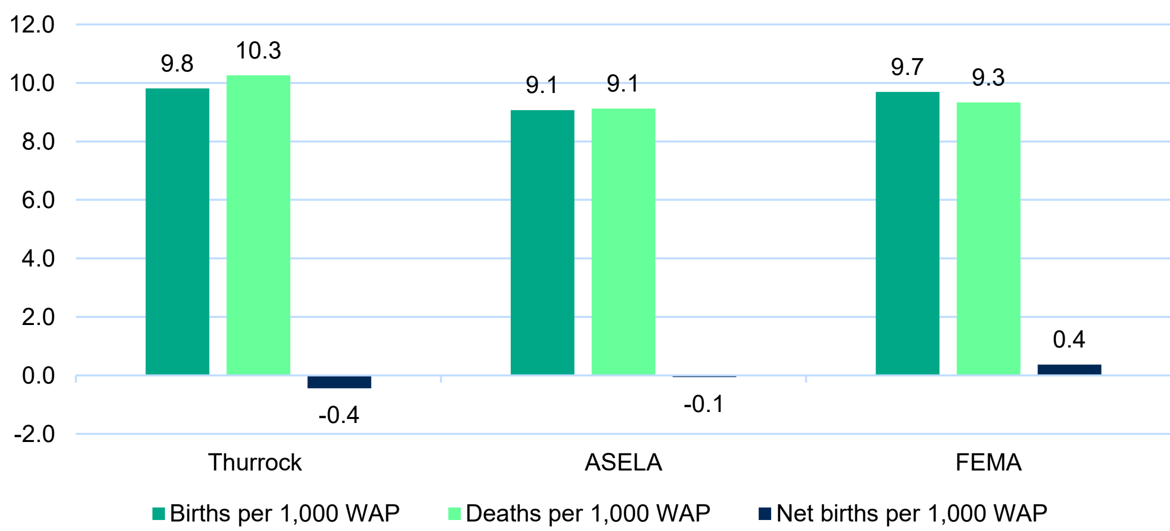
Figure 2.11: Year of incorporation by Businesses in Thurrock (1920-2024)



Source: Companies House, 2024

2.29 In terms of business demography, Thurrock exhibits a higher business birth rate than the wider FEMA and ASELA, with 9.8 business births per 1,000 working-age population compared to the FEMA's rate of 9.7 and ASELA's rate of 9.1. At the same time however, it experienced a higher rate of business deaths (10.3) compared to ASELA (9.1) and the FEMA (9.3) leading to an overall net loss in 2022 compared to an increase across the FEMA as a whole and a smaller net loss for ASELA.

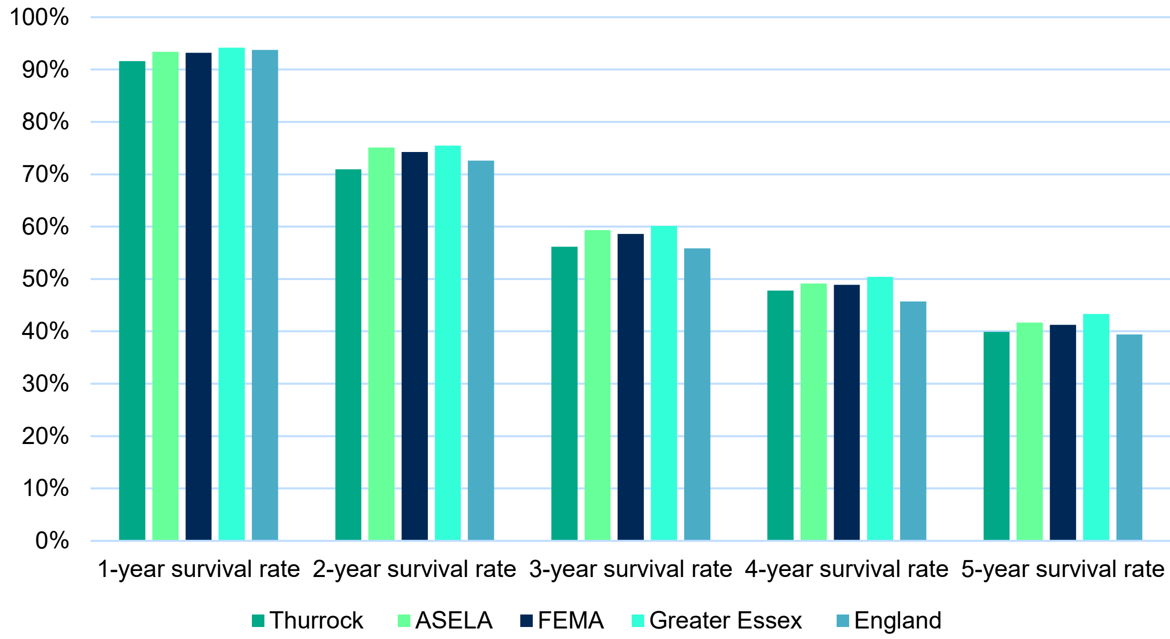
Figure 2.12: Business Demography – per working age population (1000)



Source: ONS Business Demography Data, 2022; Annual Population Survey 2022

2.30 Business urvival rates in Thurrock have remained marginally lower at each time interval compared to those in the FEMA (Figure 2.13). For new businesses in Thurrock, the chance of survival in their incorporation year is 92%, declining to 40% after five years. This represents a reduction of 52 percentage points, which is line with the reduction experienced by both the FEMA and ASELA.

Figure 2.13: Business Survival Rate for Businesses Born in 2017 in Thurrock



Source: ONS Business *Demography* Data, 2022

Key Sectors of the Economy

2.31 The 2023 EDNA considered sectors that are highlighted as growth and opportunity sectors for Thurrock according to the Thurrock Economic Growth Strategy. These sectors continue to be considered as being of high importance for Thurrock and their characteristics and drivers of growth are summarised below, taking into account any data updates since the 2023 EDNA was prepared.

Sector	Key Points
Port and Logistics	• The **port and logistics sector** in Thurrock comprises approximately 18,000 jobs and is one of the fastest growing sectors in the borough having expanded by +9,500 jobs between 2015 and 2023. • The sector is notably specialised for Thurrock, being 6 times more specialised than nationally. • Approximately 73% (around 13,000) of the jobs in this sector are related to the operation of warehousing and storage facilities emphasising the role of the Ports. • Demand for warehousing in general remains strong due to continuing online shopping and urbanisation trends. • However, there is a growing shift towards demand for manufacturing space associated with the Port activities and the opportunities it presents (reported by the Freeport landholders), particularly for **advanced manufacturing** and **food and drink production**. • The strategic importance of the Ports in Thurrock and their Freeport status, with the timeframe for tax incentives having recently been extended, continues to drive growth. • The sector continues to evolve and adapt to various externalities – following Brexit, the Ukraine war, events such as the Suez Canal blockage and more recently the economic and political uncertainty, supply chain resilience strategies like re-shoring and near-shoring are increasingly being adopted. • Modernisation, technology, automation, AI, and robotics are leading to an increase in demand for larger-scale warehousing, particularly sites with the ability to achieve height.
Construction	• The **construction sector** in Thurrock supports approximately 5,750 jobs and has experienced robust growth, expanding by 64% since 2015. • It is twice as specialized as the national average and the largest sub-sector within the industry is specialized construction activities, constituting 61% of the sector. • Modern Methods of Construction (MMC) are continuing to gain traction within the development industry, with 61% of developers already using it. • Demand for construction products and services relating to retrofitting housing as well as the scale of demand for new housing across London and the South East is driving opportunities in the sector, particularly at the Freeport where there is the opportunity for a Sustainable Constriction Model to evolve. • Major companies already located in Thurrock include Kier, Wates, Balfour Beatty, and Tarmac. • The Lower Thames Crossing received Development Consent Order (DCO) approval in March 2025 allowing it to proceed and the National Highways is committed to funding and delivering Skills Hubs in Thurrock to support its delivery as well as the broader construction industry. • The sector has a wide range of space requirements from light industrial to small home-based operations for sole-traders and self-employed.
Business Services	• The **business services sector** in Thurrock employed approximately 5,000 people in 2023 but has experienced a decline since 2015 of -1500 jobs (-23%) compared to a national increase in the sector. • Two main sub-sectors dominate the business services sector, collectively and include temporary employment agency activities and general cleaning of buildings. • The rise of home working may see an increase in demand for co-working space as well as informal and flexible spaces rather than more traditional office space. • However, the sector also includes activities more typically associated with light industrial or warehousing such as packaging activities.

Retail

- The **retail sector** in Thurrock is one of the largest employment sectors comprising approximately 12,460 jobs as of 2023 and remains 1.6 times more specialised in Thurrock than nationally.
- It has however witnessed a significant decline in employment, with a decrease of 19% (2,990 jobs) since 2015.
- Thurrock's retail sector is anchored by Lakeside Shopping Centre which has regional significance, together with town centers like Grays and Tilbury which are the subject of regeneration plans signally continued appetite for investment.
- The sector has a wide range of space requirements including high street, town centre and retail parks as well as industrial sites and warehousing units to serve supply chains.

Hospitality, Recreation and Leisure

- The **hospitality, recreation, and leisure** sector in Thurrock employed approximately 5,275 people in 2023 having increased by 15% (+685 people) since 2015.
- Despite being a sizeable sector and having grown, it is not specialised in Thurrock compared to nationally with an LQ of 0. 7.
- The majority of employment in this sector (around 71%) is attributed to restaurants, cafés, and take-away restaurants which are likely to have experienced some pressures more recently due to the cost-of-living crisis.
- Future population growth associated with new housing development will help to drive further demand for locally available leisure and recreation facilities.

Environmental Technology & Green Energy

- The sector is cross-cutting and includes environmentally friendly economic activities, such as sustainability and low carbon goods and services.
- The sector in Thurrock employed approximately 1,485 people in 2023 having increased by 5% (+70 people) since 2015.
- It is a specialised sector in Thurrock compared to nationally with an LQ of 1.5, indicating potential for further growth.
- Two-fifths of employment in this sector (around 40%) is attributed to electrical installations.
- National initiatives addressing climate change are expected to create local opportunities for green growth.
- Projects like the Thames Enterprise Park which aims to create an Environmental Technologies and Energy Hub will further boost the sector in Thurrock.
- The sector cuts Use Classes including E(g)(iii), B2 and B8 with similar locational requirements to manufacturing and logistics operations.

Creative Industries

- The **creative sector** in Thurrock employs approximately 470 people, constituting 0.6% of all jobs.
- Whilst relatively small, the sector continues to grow and over the last 6 years has seen 52% growth, exceeding the national trend of 14%.
- Initiatives such as Thames Estuary Production Corridor and Creative Estuary program which Thurrock support will help drive further growth.
- Population and housing growth will also generate further demand for creative and cultural services.
- The sector has a wide range of space requirements that are of relevance for the EDNA including workshops, studios, light industrial units and office space (Use Classes E(g)(i-iii).

Living in Thurrock

2.32 Since the 2023 EDNA was published there have been updates to the following data sets which are included in this Assessment:

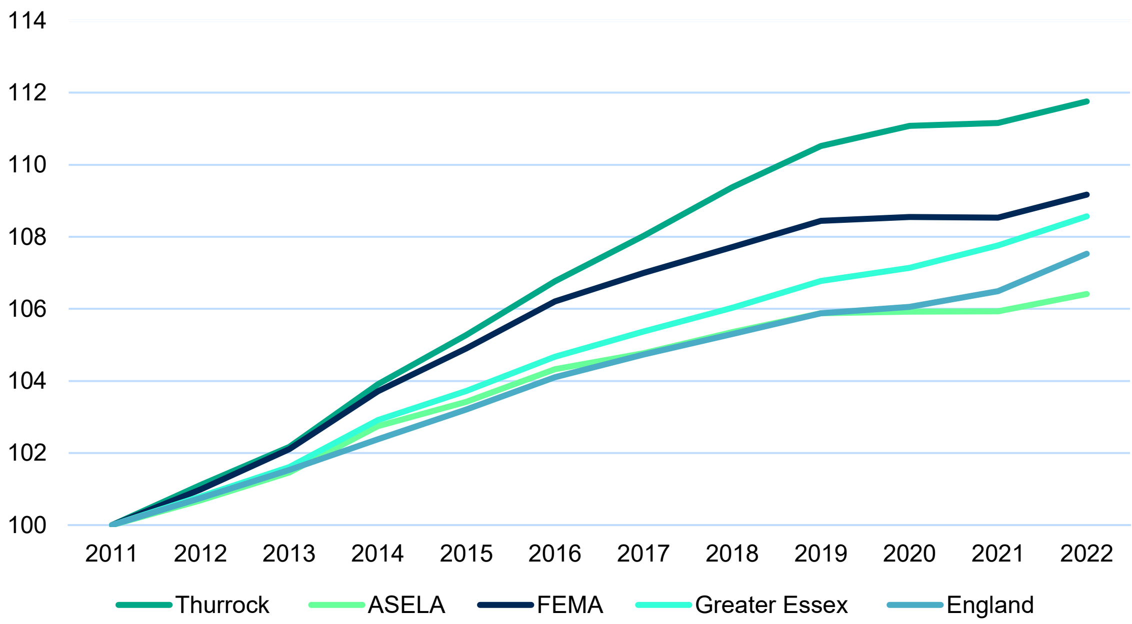
- Population data: ONS Mid-Year Population Estimates 2022 (2021 population data was used in the 2023 EDNA)
- Labour Market data: Annual Population Survey (APS) 2023 (2022 APS data was used in the 2023 EDNA)
- Income data: Annual Survey of Hours and Earnings (ASHE) 2023 (2022 ASHE data was used in the 2023 EDNA)
- Housing data: ONS Household Live Tables and Valuation Office Agency (VOA) data have been updated to 2022 data (2021 data was used in the 2023 EDNA)

2.33 There have been no updates to the Index of Multiple Deprivation (IMD) and the 2019 data reported in the 2023 EDNA remains the most up to date. We have reported the same data in this updated Assessment for completeness.

Population Growth and Labour Market

2.34 In 2022, Thurrock had an estimated total population of 177,000 accounting for around 14% of the overall population of the FEMA. Population growth across Thurrock has exceeded all of the comparator areas since 2011 with an uplift of 12%, with the FEMA experiencing the second highest growth rate (+9%).

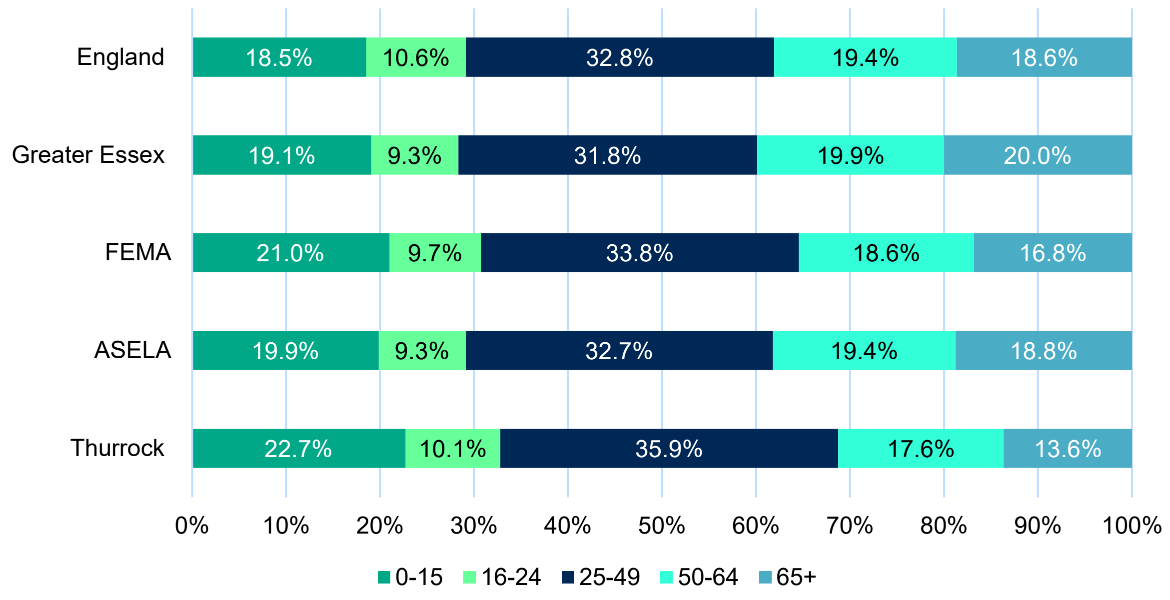
Figure 2.14: Indexed population growth 2011-2022



Source: ONS Mid-Year Population Estimates, 2022

2.35 The population breakdown of Thurrock shows a younger demographic compared to the comparator areas (Figure 2.15). This is evident from the higher proportion of residents aged 0-15, and a lower proportion of individuals aged 65+. Furthermore, the working-age population in Thurrock is larger than in all the comparator areas.

Figure 2.15: Age Profile of the Population



Source: ONS Mid-Year Population Estimates, 2022

Labour Market

Economic Activity

2.36 Thurrock has an economically active population of around 81.6% of the population (Table 2.4), which is around the same as the ASELA (81.5%) and slightly higher than the rates of FEMA (81.3%), Greater Essex (80.3%), and England (78.9%). Additionally, the proportion of residents that are economically active has increased by 3.2 percentage points over the last 6 years, which is higher than the FEMA (+2.8% percentage points) and England (+ 03.6 percentage points).

Table 2.4: Economic activity rate in Thurrock 2017 - 2023

	Economic Activity Rate				
	Thurrock	**ASELA**	**FEMA**	**Greater Essex**	**England**
2017	78.4%	78.2%	78.5%	79.6%	78.3%
2023	81.6%	81.5%	81.3%	80.3%	78.9%
Change (% points)	3.2%	3.3%	2.8%	0.7%	0.6%

Source: Annual Population Survey[9], 2023

2.37 In 2023, Thurrock exhibited an employment rate of 77.4% (Table 2.5), slightly lower than the rates observed in ASELA (77.6%) and FEMA (78.0%), but higher than Greater Essex (77.1%) and England (75.9%). Additionally, in the past 6 years, Thurrock experienced a 2.1 percentage point increase in its employment rate, which was lower when compared to FEMA (3.1 percentage points), but surpassed the national average (1.2 percentage points)

[9] It should be noted that the Annual Population Survey is a sample survey using a 95% confidence interval of precent figure (+/-) and therefore levels and changes in levels should be used with caution.

2.38 In contrast, data from the Census 2021, reveals that Thurrock shares the same unemployment rate as the broader FEMA and England, standing at 6%, albeit higher than ASELA and Essex, which both record a 5% rate.

Table 2.5: Employment rate in Thurrock 2017 - 2023

	Employment Rate				
	Thurrock	**ASELA**	**FEMA**	**Greater Essex**	**England**
2017	75.3%	75.4%	74.9%	76.4%	74.7%
2023	77.4%	77.6%	78.0%	77.1%	75.9%
Change	2.1%	2.2%	3.1%	0.7%	1.2%

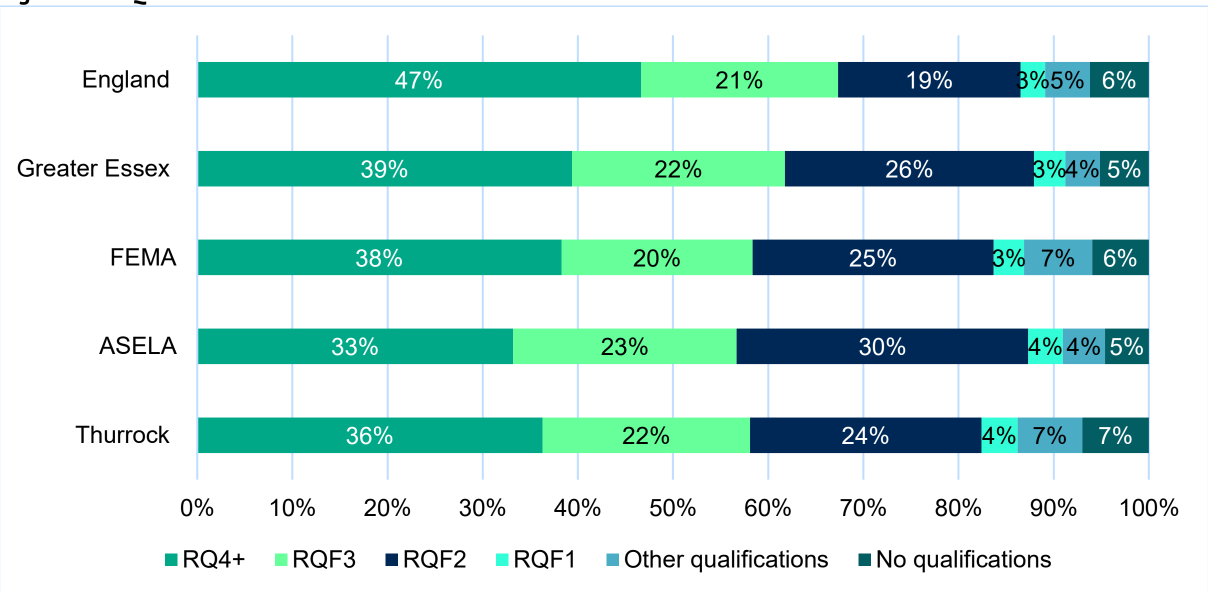
Source: Annual Population Survey, 2023

Skills and Qualifications

2.39 According to latest available data (2023), a significant portion of Thurrock's labour force (36%) (Figure 2.16) hold degree level qualifications, surpassing ASELA (33%), but below the FEMA (38%), and Greater Essex averages (39%), and well behind the national average (47%). Furthermore, Thurrock has a higher percentage of residents without qualifications, standing at 7%, which is just above all comparator groups.

2.40 Growth in degree qualified residents across Thurrock has increased by 4 percentage points since 2016 which is well behind the growth experienced in the ASELA and the FEMA (both +7percentage points), and just behind the national average growth (+5percentage points).

Figure 2.16: Qualification Profile



Source : Annual Population Survey, 2023

Home Working

2.41 During and following the COVID-19 pandemic, the UK witnessed a significant shift in work dynamics of relevance to this Assessment. Between October to December 2019 and January to

March 2022, homeworking in the UK more than doubled from 4.7 million to 9.9 million people[10]. In the same period, the East of England had the third highest percentage of homeworkers (31.1%, 903,000). Furthermore, commuting between regions different to their region of residence for work fell across the UK by 26.1% (down 629,000). The East of England had the third largest decline in the number of people commuting out of a region for work (-29%, down 144,000).

2.42 There are no further updates to homeworking data at the local authority level since the 2023 EDNA was prepared. The analysis therefore remains up to date and is summarised as follows:

- The three sectors with the greatest proportion of workforce working mainly from home are the ICT industry (21.9%), professional, scientific and technical sector (17.4%) and the financial services sector (13.3%).
- Around 3.6%[11] of Thurrock's workforce mainly work from their own home, with a further 10.2% working mainly from the same grounds as their home.
- Despite an increase from the previous year of those mainly working from home (2.3% in 2019), this is significantly lower than the UK average of 8.5%.
- One of the reasons for the relatively low proportion of people working-from-home percentage can be attributed to Thurrock's largest employment sectors and the relatively low proportions of people that are able to work from home in these sectors. Within the transport and storage sector for example, only around 3.1% of people typically work from home.

Average Earnings

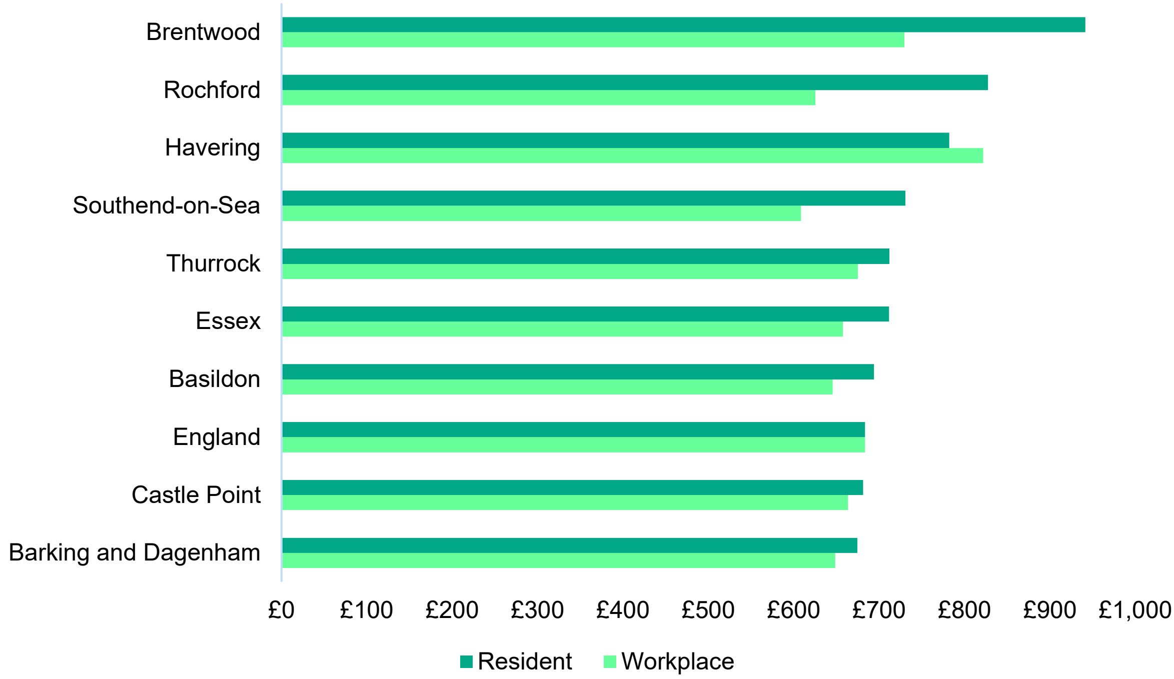
2.43 Average earnings in Thurrock exceed the national average for resident earnings but fall short in terms of workplace earnings. Within the ASELA and FEMA catchment area, Thurrock ranks fourth and fifth for resident earnings and fifth and sixth for workplace earnings, respectively.

2.44 Average weekly salary levels are higher for residents (£712) (Figure 2.17) compared to workplace workers (£675), indicating that the opportunities for residents to access higher paid employment are currently outside of the Borough.

[10] Homeworking in the UK – regional patterns - Office for National Statistics (ons.gov.uk)

[11] APS (2020) Estimates of homeworking in the UK

Figure 2.17: Resident and Workplace Earnings



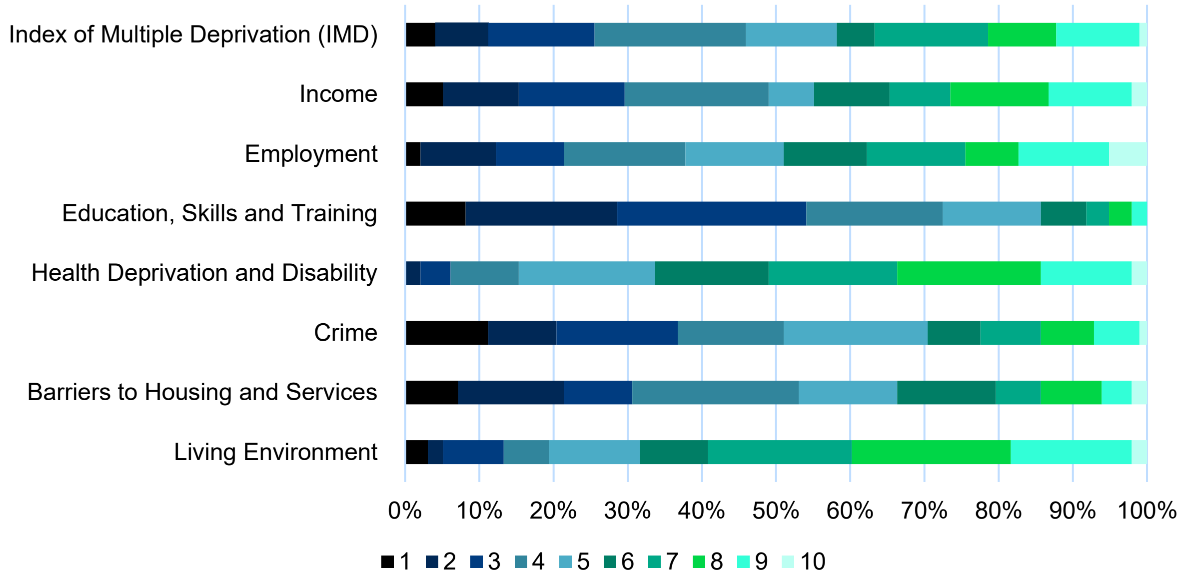
Source: Annual Survey of Hours and Earnings, 2023

Deprivation Levels

2.45 The 2019 IMD (Index of Multiple Deprivation) data revealed that Thurrock experiences pockets of fairly high levels of deprivation (Figure 2.19) around the south west and south of the borough in particular.

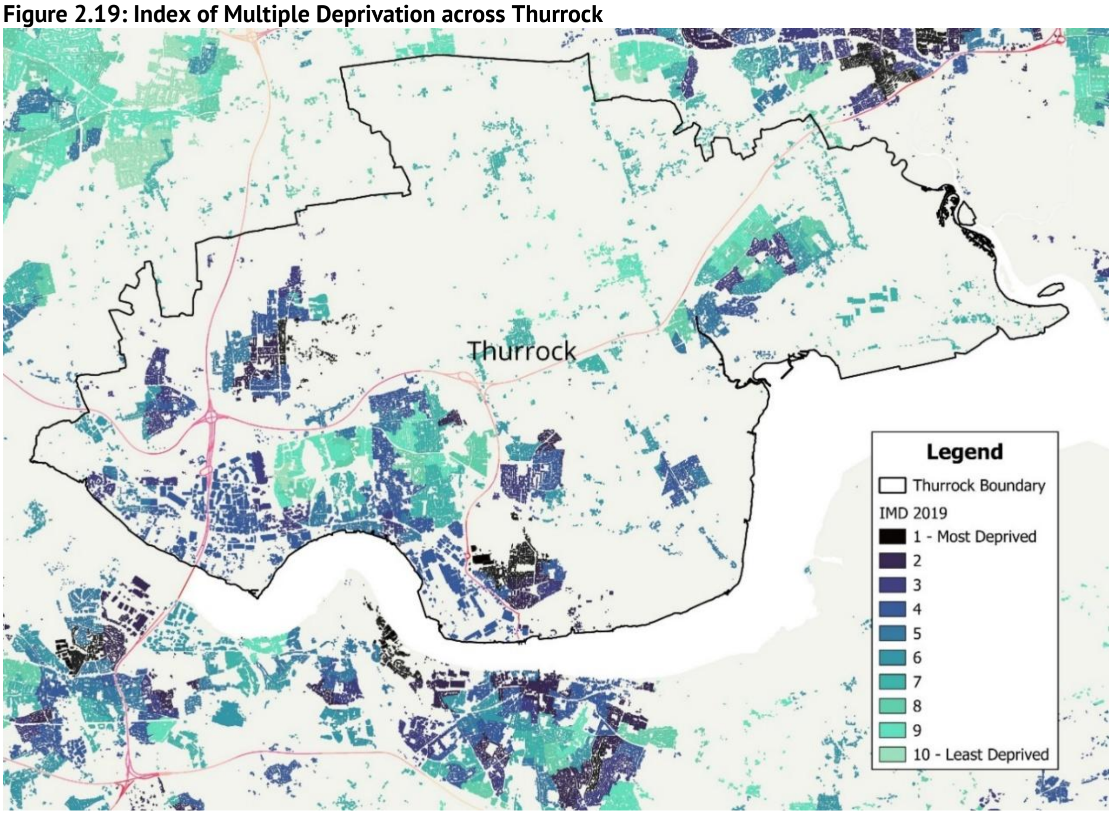
2.46 Thurrock faces particular challenges around education, skills, and training with approximately 54% of Lower Super Output Areas (LSOAs) situated within the top 30% of the most deprived nationally in this regard (Figure 2.18). In addition, there are notable levels of deprivation observed in the crime domain, as well as challenges related to housing accessibility and income, affecting approximately 37%, 31%, and 30% respectively.

Figure 2.18: Index of Multiple Deprivation by Domain in Thurrock, 2019 (1 – Most Deprived, 10 – Least Deprived)



Source: DHULC, 2019.

Figure 2.19: Index of Multiple Deprivation across Thurrock



Source: DHULC, 2019. *Contains OS data © Crown copyright and database right 2023.*

Housing and Households

2.47 In 2022, the borough of Thurrock was home to approximately 68,890 households (Table 2.6), constituting approximately 13% of the total households within the broader FEMA catchment area. Since 2016, there was growth in the number of households of 6%, surpassing both the national average and that of the ASELA and FEMA catchment areas.

Table 2.6: Household Change (2016-2022)

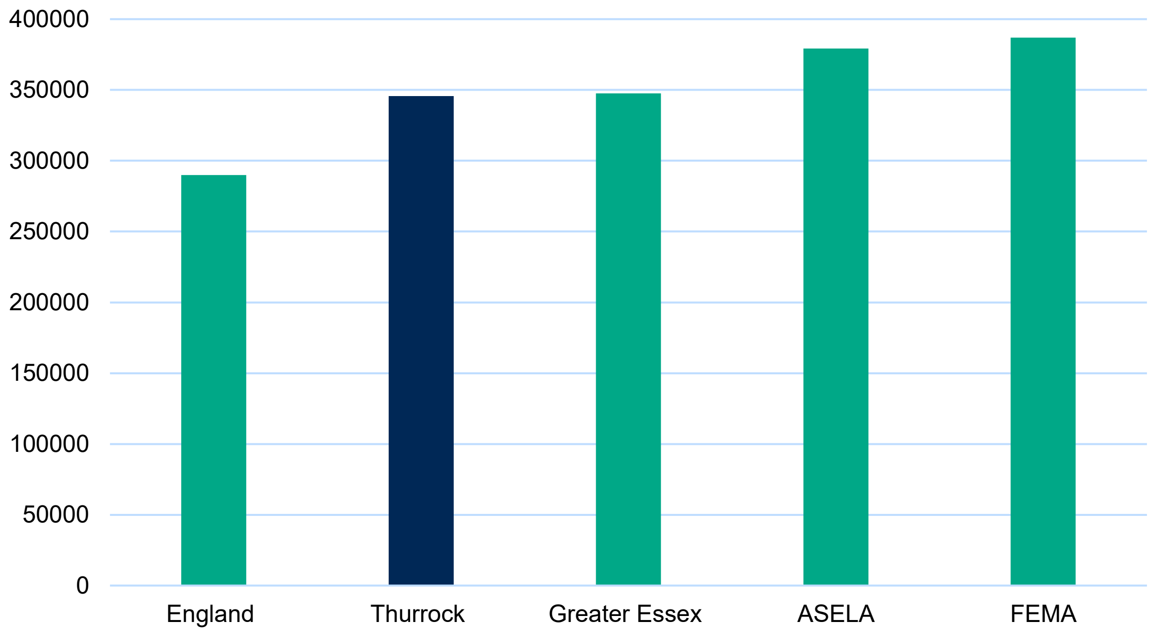
	2016	2022	Change
Thurrock	65,050	68,890	6%
ASELA	320,320	330,240	3%
FEMA	497,820	515,990	4%
Greater Essex	747,490	779,770	4%
England	22,884,180	23,868,500	4%

Source: ONS Household Live Tables, 2022

Affordability Issues

2.48 In 2022, the median house price in Thurrock stood at approximately £345,000 (Figure 2.20), 11.5% below the FEMA average. Thurrock's housing prices were lower than those in all other comparable regions except the national average, where it was 16% higher.

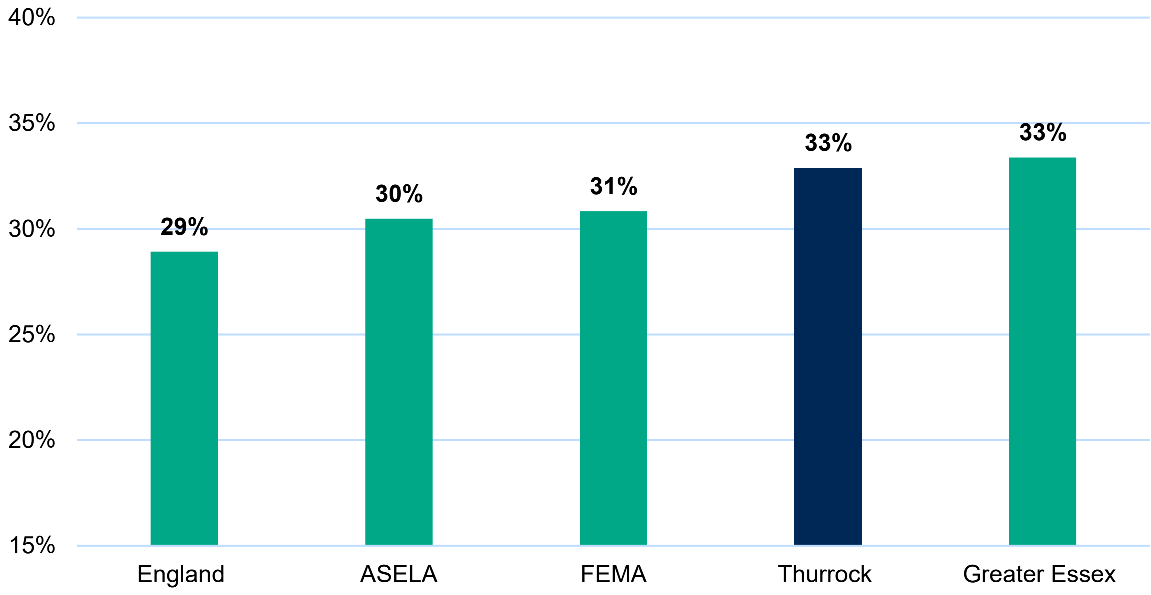
Figure 2.20: House Prices



Source: DHULC, VOA *and* ONS, 2022

2.49 Despite below average house prices, over the past six years, the median house prices in Thurrock have surged by approximately 33% (Figure 2.21), marking the most substantial increase among nearly all of the comparator areas and surpassing the national uplift of 29%.

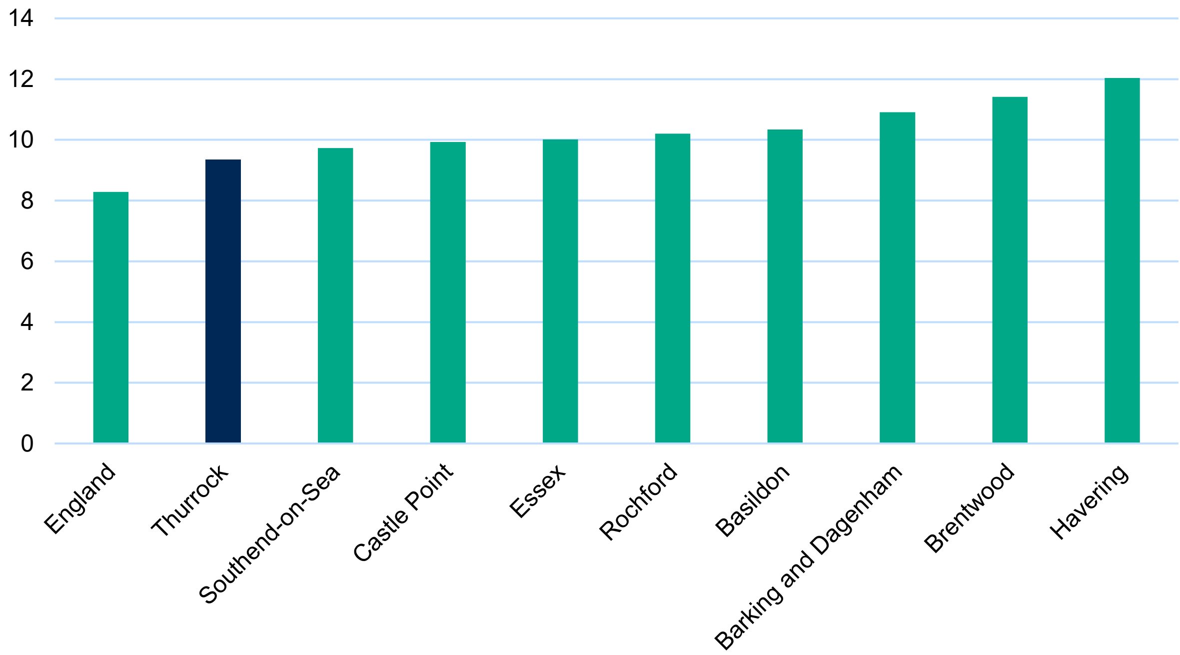
Figure 2.21: House Price Change 2016 - 2022



Source: DHULC, VOA and ONS, 2022

2.50 In 2022, Thurrock's affordability ratio, which is the ratio of median house price to median gross annual earnings, stood at 9.35 (Figure 2.22). While higher than the national average, indicating comparatively lower affordability, it remained lower than other local authorities within the FEMA and Greater Essex catchment area. This positions Thurrock as the most affordable area to reside in South Essex. However, despite this, Thurrock's affordability ratio has risen by 10% since 2016, slightly exceeding the national average increase of 7%. Nevertheless, it represents the second-lowest increase among all local authorities, suggesting that Thurrock's affordability rate has fared better than most areas.

Figure 2.22: Affordability ratio, 2022



Source: ONS, 2022

3 Policy Review

3.1 This section provides a summary of the policy framework that was reviewed as part of the 2023 EDNA, taking into account any updates to policy that have been released since the 2023 EDNA was prepared. As with the 2023 EDNA, this helps to understand Thurrock's role in the wider economy together with the influence that strategic and local policy may have on economic growth.

3.2 The key policy and strategy documents that have been summarised are shown in the table below together with an indication of whether these have been updated since the 2023 EDNA was prepared.

Geography	Documents Reviewed and Summarised	Documents Updated
National	• National Planning Policy Framework, 2024 • Planning Practice Guidance • Invest 2035: the UK's modern industrial strategy	• Yes • No • No
Regional	• Economic Growth Strategy for South Essex • South Essex Growth and Recovery Prospectus • South Essex Economic Development Needs Assessment • Thames Estuary Growth Board • Thames Estuary Production Corridor	• No • No • No • No • No
Local	• Thurrock Core Strategy and Policies for Management of Development • Thurrock Economic Growth Strategy • Backing Thurrock • Thurrock Health and Wellbeing Strategy • Thurrock Transport Strategy • Thurrock Plan for Culture • Thurrock Corporate Plan	• No • No • Yes • No • No • Yes • Yes

National

National Planning Policy Framework, 2024

3.3 The National Planning Policy Framework (NPPF) was revised in December 2024 with the aim of setting out the Government's planning policies for England and how these should be applied in a local context.

3.4 **NPPF Chapter 2: Achieving Sustainable Development** underscores the interconnectedness of planning with sustainable development across three dimensions: economic, social, and environmental:

- **an economic objective**: to help build a strong, responsive and competitive economy, by ensuring that sufficient land of the right types is available in the right places and at the right time to support growth, innovation and improved productivity; and by identifying and coordinating the provision of infrastructure.
- **a social objective**: to support strong, vibrant and healthy communities, by ensuring that a sufficient number and range of homes can be provided to meet the needs of present and future generations; and by fostering well-designed, beautiful and safe places, with accessible

services and open spaces that reflect current and future needs and support communities' health, social and cultural well-being; and

- **an environmental objective**: to protect and enhance our natural, built and historic environment; including making effective use of land, improving biodiversity, using natural resources prudently, minimising waste and pollution, and mitigating and adapting to climate change, including moving to a low carbon economy.

3.5 **NPPF Chapter 5 – Delivering a sufficient supply of homes** introduces significant changes to the standard method for calculating housing needs. The method now starts with a baseline of 0.8% of existing housing stock, requiring substantial housing delivery across all areas, not just those forecasted for growth. The affordability ratio adjustment increases housing targets in less affordable areas, with a 0.95% uplift for every percentage point above a 5:1 house price to earnings ratio. Previous caps limiting uplifts to 40% above baseline needs are removed, demanding ambitious planning from local authorities. The urban uplift, previously adding 35% for major urban centers, is removed to promote even growth nationwide.

3.6 **NPPF Chapter 6: Building a Strong, Competitive Economy** states that "*planning policies and decisions should help create the conditions in which businesses can invest, expand and adapt. Significant weight should be placed on the need to support economic growth and productivity, taking into account both local business needs and wider opportunities for development*" (paragraph 85).

3.7 Paragraph 86 that planning policies should "*set out a clear vision and strategy which positively and proactively encourages sustainable economic growth, having regard to Local Industrial Strategies and other local policies for economic development and regeneration*". It also states the need to "pay particular regard to facilitating development to meet the needs of a modern economy, including by identifying suitable locations for uses such as laboratories, gigafactories, data centres, digital infrastructure, freight and logistics".

3.8 Paragraph 87 states that "*planning policies and decisions should recognise and address the specific locational requirements of different sectors. This includes making provision for clusters or networks of knowledge and data-driven, creative or high technology industries; and for new, expanded or upgraded facilities and infrastructure that are needed to support the growth of these industries (including data centres and grid connections)*". They should also make provision for "*storage and distribution operations at a variety of scales and in suitably accessible locations*".

3.9 **Chapter 11: Making Effective Use of Land** states that "*planning policies and decisions should promote an effective use of land in meeting the need for homes and other uses, while safeguarding and improving the environment and ensuring safe and healthy living conditions*." (paragraph 123)

3.10 There is an important amendment to paragraph 125(c) which states that: "*Planning policies and decisions should [...] give substantial weight to the value of using suitable brownfield land within settlements for homes and other identified needs, proposals for which should be approved unless substantial harm would be caused.*"

3.11 Paragraph 127 further emphasises that planning authorities should take a "*positive approach to applications for alternative uses of land which is currently developed but not allocated for a specific purpose in plans, where this would help to meet identified development needs. In particular, they should support proposals to: a) use retail and employment land for homes in areas of high housing* *demand, provided this would not undermine key economic sectors or sites or the vitality and viability of town centres, and would be compatible with other policies in this Framework*."

3.12 Along with changes to housing supply, **Chapter 13: Protecting Green Belt Land,** contains the most significant amendments to planning policy. Paragraph 146 states that Councils should now review their Green Belt boundaries "*where an authority cannot meet its identified need for homes, commercial or other development through other means*."

3.13 Paragraph 148 further states that "*plans should give priority to previously developed land, then consider grey belt, which is not previously developed, and then other Green Belt locations. [...] Strategic policy-making authorities should consider the consequences for sustainable development of channelling development towards urban areas inside the Green Belt boundary, towards towns and villages inset within the Green Belt or towards locations beyond the outer Green Belt boundary*."

3.14 Furthermore, the grey belt policy was introduced, and the Government have revised the definition from what was consulted upon based on consultation feedback to ensure clarity. Further guidance for local authorities will be released in early 2025 to ensure a consistent approach to Green Belt land. The definition of grey belt land is: "*For the purposes of plan-making and decision-making, 'grey belt' is defined as land in the Green Belt comprising previously developed land and/or any other land that, in either case, does not strongly contribute to any of purposes (a), (b), or (d) in paragraph 143. 'Grey belt' excludes land where the application of the policies relating to the areas or assets in footnote 7 (other than Green Belt) would provide a strong reason for refusing or restricting development*".

National Planning Practice Guidance, 2019

3.15 In accordance with the National Planning Practice Guidance (PPG, 2019), local councils are empowered to determine the specific types of employment land required within their jurisdictions.

3.16 To do so effectively, strategic policy-making authorities must establish a robust evidence base that reflects local business needs and market conditions, continually updating it to remain relevant. This entails close collaboration with the business community, aligning with the Local Industrial Strategy to grasp current and future requirements.

3.17 Factors to assess include:

- Determining the functional economic market area.
- Evaluating existing employment land stock.
- Tracking recent patterns of supply and loss.
- Analysing market demand and signals for growth and innovation; and
- Moreover, authorities must identify any instances of market failure, such as physical or ownership constraints hindering effective land use

3.18 The government's PPG provides further guidance on analysing market demand, estimating employment floorspace requirements, allocating space for logistics, and addressing specific locational needs of emerging sectors, ensuring comprehensive planning for sustainable economic development.

Invest 2035: The UK's Modern Industrial Strategy

3.19 The Invest 2035 strategy is the UK government's 10-year plan to create conditions for increased investment and high-quality jobs in high-growth sectors. It aims to attract international investment and encourage domestic businesses to scale up, driving sustainable, inclusive, and resilient growth across the UK. Its primary objective is to drive growth, by taking advantage of the UK’s unique strengths and untapped potential, enabling the UK’s world-leading sectors to adapt and grow, and seizing opportunities to lead in new sectors, with high-quality, well-paid jobs. The industrial strategy will focus on the sectors which offer the highest growth opportunity for the economy and business. Eight growth-driving sectors have been identified:

- advanced manufacturing
- clean energy industries
- creative industries
- defence
- digital and technologies
- financial services
- life sciences
- professional and business services

Regional

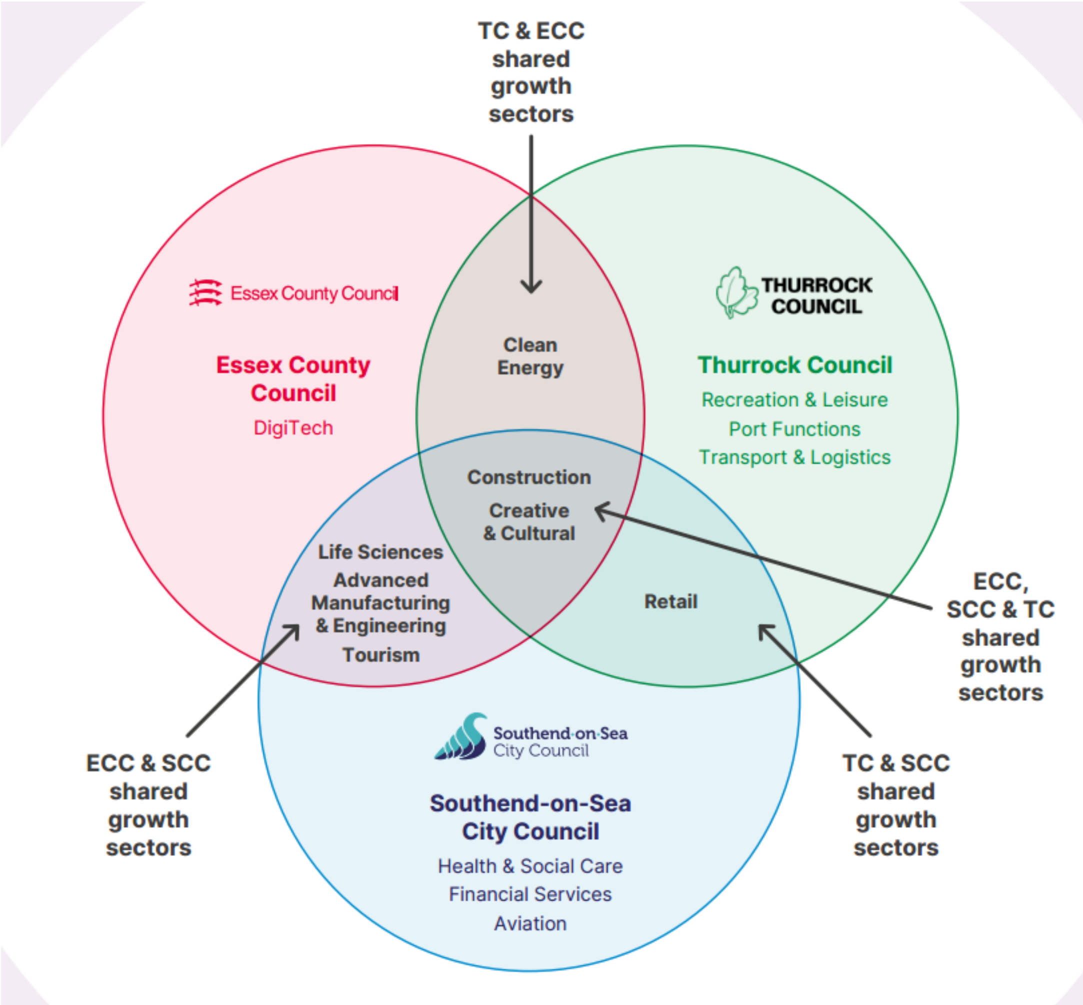
Greater Essex Economic Priorities and Economic Overview 2025-26

3.20 With the establishment of a Greater Essex Combined Authority anticipated by May 2026 and with the development of a new Local Growth Plan for the incoming Mayor expected to follow shortly after, the 3 upper tier local authorities (Essex County Council, Thurrock Council and Southend-on-Sea City Council) have collaborated to bring together the existing priorities and delivery plans of the three councils for the 2025/26 financial year based on content that has already undergone internal governance processes within each authority.

3.21 The economic overview highlights the economic strengths and opportunities for Greater Essex including infrastructure such as the Ports and two Freeports (Freeport East and Thames Freeport), the Lower Thames Crossing, two leading Universities, a strong entrepreneurial spirit and projected jobs and GVA growth of 50,000 and £2.7m respectively by 2030. At the same time, key challenges are reported as a growing and ageing population, housing and skills and qualifications shortages, increasing levels of economic inactivity and below average productivity, over reliance for employment on vulnerable sectors such as retail and food services and deprivation and housing affordability issues.

3.22 The combined economic priorities for the region to address these challenges include developing key sectors, supporting businesses and attracting inward investment. Figure 3.1 below highlights the overlap of several of Thurrock’s key sectors with those of Essex and Southend-on-Sea including Clean Energy, Construction, Creative and Cultural and Retail.

Figure 3.1 Greater Essex Key Sectors



Source: Greater Essex Partnership Priorities 2025/26

3.23 The partnership recognises that lower than average productivity, a fragmented and under performing business support system and a shortage of commercial space are hindering sector growth across the region. In response, the Greater Essex Partnership is prioritising:

- working alongside the Greater Essex Business Board to reflect business priorities in their activity;
- facilitating a new business facing service with a 'one front door' approach aligned to nationally funded support such as the Growth Hub;
- continuation of funding for the No Use Empty south Essex (NUE SE) programme to redevelop empty commercial properties across Thurrock and neighbour South Essex authorities; and
- maximising the visibility of opportunities at the two Freeports.

3.24 Other relevant priorities for Thurrock that are specific or shared with wider Greater Essex include:

- delivering against its Skills and NEET Strategy which aims to increase apprenticeships, vocational qualifications and essential skills and address long term unemployment as well as develop a community-based approach to supporting pathways into work and training;
- regeneration and housing investment including Purfleet on Thames Regeneration Plan in collaboration with Homes England, Grayes Town Deal (Riverside) and Tilbury Town Deal Programme.
- Ongoing improvements to digital connectivity and support for Nationally Significant Infrastructure Projects (NSIPs), including the Lower Thames Crossing

Thames Estuary Growth Board

3.25 The Thames Estuary Growth Board (TEGB), comprising business and political leaders from various regions including North Kent, South Essex, and East London, spearheads a government-backed growth initiative. With the potential to create 1.3 million jobs and contribute £190 billion to the UK economy by 2050[12], the TEGB focuses on leveraging connections to foster green growth, enhance transport infrastructure, attract inward investment, address housing needs, and develop green energy infrastructure.

3.26 Key sector focuses identified by the Growth Board[13] include hydrogen deployment, with the Thames Estuary positioned as a hub for hydrogen utilization across various sectors like transport and construction, potentially creating 9,000 jobs and generating £3 billion in Gross Value Added (GVA). Additionally, emphasis is placed on promoting light freight alternatives to road deliveries through river freight, offering a cleaner mode of transport and potentially generating £53 million in GVA annually by 2030.

3.27 Ports, Freeports, and Logistics form another focal point, with the Thames Freeport designated as one of the UK's first freeports, providing special tax and customs incentives to drive economic activity and innovation. The Freeport status offers broader benefits such as planning reforms, infrastructure funding, and innovation incentives, with significant land available for immediate development.

3.28 Moreover, the Creative Sector is targeted for growth, particularly through initiatives like the Thames Estuary Production Corridor which is anticipated to deliver 50,000 jobs and £3.7 billion in GVA by 2050[14]. Investment opportunities are being identified, particularly in fashion and screen-based industries, to capitalize on the region's potential as a creative hub.

Thames Estuary Production Corridor

3.29 The Thames Estuary Production Corridor (TEPC) is a visionary program launched in 2017, aiming to unite east London, the North Kent Coast, and South Essex into a world-class centre for creative and cultural production. Led by the Mayor of London, it seeks to leverage the region's manufacturing legacy by establishing state-of-the-art creative and cultural production centres

[12] Investment Opportunities - Thames Estuary

[13] The Green Blue Workplan - Thames Estuary

[14] Hydrogen Investment - Thames Estuary

across the Estuary, fostering innovation, job creation, talent development, and supporting the rapid growth of the creative economy.

3.30 Purfleet-on-Thames in Thurrock emerges as a significant hub for creative production within the South East, according to the TEPC Vision and Action report (2020). High House Production Park serves as a catalyst for large-scale production activities and the growth of the creative SME community. The strategic vision entails transforming Purfleet-on-Thames into the Media Village, housing a 135,000 square foot film and television studio alongside post-production facilities, positioning the area as a vital node within the burgeoning creative landscape of the Thames Estuary.

3.31 The Vision and Action Report notes that there is proven demand for space across the Estuary from large-scale production facilities to smaller specialised spaces to support enterprise and innovation as well as space from artists, businesses and institutions seeking new locations to grow and innovate.

Local

Thurrock Core Strategy, 2015

3.32 The Thurrock Core Strategy and Policies for Management of Development (2015, as amended) delineates the borough's spatial vision, strategy, and planning policies, placing emphasis on sustainable employment growth. It underscores the imperative of fostering a thriving economy by ensuring adequate land and floorspace to accommodate projected employment needs. The Strategy aligns with the East of England Plan's indicative target of generating 26,000 new jobs for Thurrock by 2026 and beyond, envisioning a future supply of approximately 456 gross hectares of employment land across the borough.

3.33 Furthermore, the Strategy incorporates several thematic policies pertinent to strategic employment and town centres.

- **Core Strategy Thematic Policy 6**: **Strategic Employment Provision** outlines measures to maintain robust economic and employment growth through the creation of a network of high-quality Strategic Economic Hubs, delivering significant employment land over a specified period. It advocates for safeguarding existing industrial and commercial land, establishing new sites, and encouraging mixed-use development to optimise employment contribution. The policy also allows for the redevelopment of redundant or underused employment land for non-employment uses, provided it maintains acceptable impacts on land availability.
- **Core Strategy Thematic Policy 7**: **Network of Centres** focuses on enhancing urban centres, such as Lakeside Basin and Grays Town Centre, to serve as regional and local hubs. It entails adding substantial floorspace to Lakeside Basin and redeveloping Grays Town Centre into a multifaceted hub complementing Lakeside. Additionally, the policy aims to renew and upgrade existing local centres while establishing new ones to meet evolving community needs.
- **Core Strategy Thematic Policy 8**: **Viability and Vitality of Existing Centres** underscores the importance of bolstering the vitality and viability of centres to cater to residents' needs and serve as focal points for various activities. This policy encourages improvements to centres

to accommodate retail, leisure, cultural, business, and residential uses, fostering their role as vibrant and sustainable community hubs.

Backing Thurrock (2020-2025)

3.34 Backing Thurrock is a five-year strategy produced by Thurrock Council to achieve economic recovery, resilience and a return to growth following the Covid-19 Pandemic. The Strategy includes a vision and approach for the next five years and includes an action plan.

3.35 In response to the pandemic's impacts, the strategy identifies significant economic contraction and increased claimant counts, particularly affecting sectors like retail, hospitality, culture, leisure, and aviation. Lasting changes are anticipated, such as the perpetuation of remote work and businesses seeking to minimize office space expenses, alongside transformations in the high street, propelled by the accelerated shift towards online shopping trends.

3.36 The strategy articulates a vision for growth aimed at reframing the Council's economic development approach and positioning it as a catalyst for change to address challenges and unlock growth potential. Central to this vision are objectives focusing on resilience, including building an inclusive economy, supporting vulnerable groups, and capitalizing on opportunities for levelling up. Additionally, the strategy emphasizes a return to growth, prioritizing the strengthening of key sectors and seizing opportunities arising from long-term shifts, such as green growth initiatives.

Thurrock Economic Growth Strategy (2016-21)

3.37 The Economic Growth Strategy spanning 2016-2021 closely mirrors the analysis outlined in the SE LEP Strategic Economic Plan, particularly focusing on key growth areas and opportunities in Thurrock. Primarily, the strategy prioritizes skills enhancement, business diversification, and geographic development. It aims to foster a more resilient economy by diversifying the business base, increasing the number of high-skilled, high-wage jobs, and addressing pockets of deprivation through comprehensive place-making and home delivery initiatives.

3.38 Strategic sites for the development of a nighttime economy are pinpointed in Grays and Tilbury town centres, aiming to bolster economic activity beyond traditional business hours. Notably, the Thames Enterprise Park emerges as a pivotal development hub, poised to attract higher-value and high-tech sectors, characterized by robust innovation, investment, research, development, and export potential. Other notable developments include Purfleet and High House Production Park, intended to create job opportunities within the creative sector, as well as investments in Lakeside and West Thurrock retail offerings and supply chains, complementing the London Gateway shipping developments.

3.39 Thurrock's core sectors, including Port, Logistics, Transport, Retail, and Construction, underscore the need to enhance representation in research and development and managerial skills. Moreover, opportunity sectors such as Business Services, Recreation, Leisure, Environmental Technology, Energy, and Creative Industries are identified, aligning closely with the SE LEP's strategic economic plan for sectoral growth.

Thurrock Health and Wellbeing Strategy (2022-2026)

3.40 The Health and Wellbeing Board in Thurrock is dedicated to enhancing health and wellbeing outcomes for all residents. Aligned with the Backing Thurrock Economic Growth Strategy, the

Health and Wellbeing Strategy is poised to contribute to the attainment of skills and inclusive employment objectives crucial for economic advancement.

3.41 Recent deprivation scores reveal that Thurrock harbour's multiple areas ranking among the 10% most deprived regions in the UK, including Tilbury, South Ockendon, and Grays. Notably, life expectancy in Thurrock falls significantly below the national average, with inhabitants in the most affluent areas enjoying eight more years of healthy life compared to those in the most deprived areas.

3.42 The strategy encompasses person-centred healthcare initiatives aimed at addressing housing issues, community safety, and long-term health conditions. A striking statistic reveals that two-thirds of individuals with long-term health conditions in Thurrock, such as high blood pressure and mental health issues, remain undiagnosed or lack support. By bolstering support for individuals with long-term health conditions, the strategy seeks to narrow health disparities within the community and enhance workforce capacity. This targeted approach is envisioned to bridge health inequalities between the least and most deprived areas, thereby ensuring that Thurrock's workforce is equipped to meet the demands arising from major projects like the Thames Freeport.

Thurrock Transport Strategy (2013-2026)

3.43 The Thurrock Transport Strategy, spanning 2013 to 2026, articulates a vision for the transport system and encompasses five strategic aims: enhancing accessibility, mitigating congestion, improving air quality and addressing climate change, ensuring safer roads, and facilitating regeneration efforts. These broad aims serve as foundational goals essential for realizing the vision outlined. The council is currently preparing a new Thurrock Transport Strategy alongside the preparation of a new Local Plan.

Thurrock Plan for Culture 2025 – 2029

3.44 The Council have recently published a new Cultural Strategy which sets a direction for change and actions to support Thurrock's creative offer and talent. Three key themes are identified in the Plan, including Cultural Connections, Cultural Capital and Cultural Capacity, each of which has a series of associated actions.

3.45 The Plan highlights that there are high levels of need for new workspace and project space required to support the sector and that demand for affordable and flexible space for working, rehearsing, exhibiting and community-based activities outstrips supply of space in Thurrock. The Plan notes there may be opportunities to support the sector through meanwhile spaces as well as fostering creative clusters in the town centres of Grays, Tilbury and Purfleet-on-Thames. It is also suggested that the potential for trickle down effects from industrial investment including the Thames freeport should be further explored to support the sector.

Thurrock Corporate Plan: A fresh start for Thurrock, 2024-2029

3.46 Thurrock Council adopted a new Corporate Plan in 2024 setting out how the council will operate over the next five years and aims to rebuild trust and confidence in the council as it recovers. It recognises the need to achieve greater levels of efficiency and effectiveness as it strives to improve performance.

3.47 As well as a corporate outcome, the Plan is designed to achieve two policy outcomes for People and Place both of which include strategic objectives and priority actions to achieve change. In relation to Place, the policy outcome is "*to achieve a strong and well-connected place that enables our borough, its diverse communities and businesses, to thrive and grow*".

3.48 A series of strategic objectives underpin the Place policy outcome including:

- collaborating with stakeholders, residents, communities and businesses to develop a plan for Thurrock ….that mobilises the collective endeavours of the private, public and voluntary, community, faith and social enterprise sector to deliver;
- stimulating local economies by investing in or influencing investment in the infrastructure, housing, transport and educational capabilities to create jobs and transform places;
- ensuring that economic growth provides opportunities to Thurrock residents and communities and reduces inequalities; and
- protecting and improving our environment, to ensure Thurrock improves as a quality place to live, with clean streets, well maintained public realm and well-maintained roads

3.49 Key priorities for the period 2024-2029 include maximising the impact of the Freeport for businesses, residents and the community including through leveraging local employment and supply chain opportunities, maximising the impact of the Thames Estuary for Thurrock and developing an insight rich Economic Development Strategy.

4 Future Growth Scenarios

4.1 This section provides an update to the 2023 EDNA in terms of Thurrock's future economic growth needs for floorspace and employment land. It includes updates to the scenarios previously considered to quantify future needs for office, industrial and warehousing floorspace and land as well as consideration of an additional scenario. The scenarios include:

- Employment-led scenarios (labour demand):
  - An updated baseline labour demand projection using updated sectoral employment forecasts to assess the potential future demand for floorspace and land.
  - An updated higher-growth scenarios, based on an assessment of priority growth sectors for Thurrock and considering demand which may not be reflected in standard employment projections.
  - Consideration of a mid-growth scenario reflecting economic uncertainty.
- An updated trends-based scenario, based on an extrapolation of past trends in take-up of employment land.

4.2 As with the 2023 EDNA, these scenarios have been sense checked with potential labour supply derived from the projected changes in the areas workforce required to meet housing need. This scenario has been informed by Thurrock's updated Housing Market Assessment (Turley, 2025).

Relevant Planning Policy Guidance

4.3 The National Planning Policy Framework (NPPF) was updated in December 2024 following the election of a new labour Government earlier that year. The updated NPPF provides strong support for economic growth. It includes a new Standard Method for assessing housing needs, which will support the Government's ambition to deliver 1.5 million homes over the next 5 years. This method increases national housing targets, which is reflected in revised targets at the local authority level.

4.4 The NPPF changes emphasise the need for local planning authorities to provide for the expansion or modernisation of important local, regional, or national industries to bolster economic growth and resilience (see paragraph 87).

4.5 Provisions in the updated NPPF on planning for employment land – as with the previous version – are set out within Chapter 6 (Building a strong, competitive economy). The starting point is that planning policies and decisions should help create the conditions for businesses to invest, grow and adapt. It also emphasises that "significant weight should be placed on the need to support economic growth and productivity, taking into account both local business needs and wider opportunities for development". Paragraph 86 states that planning policies should:

- Set out a clear economic vision and strategy which positively and proactively encourages sustainable 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.

- Pay particular regard to facilitating development to meet the needs of a modern economy, including by identifying suitable locations for uses such as laboratories, gigafactories, data centres, digital infrastructure, freight and logistics; and
- Seek to address potential barriers to investment, such as inadequate infrastructure, services or housing, or a poor environment; and
- Be flexible enough to accommodate needs not anticipated in the plan, allow for new and flexible working practices (such as live-work accommodation), and to enable a rapid response to changes in economic circumstances.

4.6 As noted in the 2023 EDNA, the thrust of the NPPF is on positive plan making. Paragraph 11 (Presumption in favour of sustainable development) specifies that plans should positively seek opportunities to meet the development needs of their area and be sufficiently flexible to adapt to rapid change. Paragraph 15 (Plan-making) specifies that Plans should provide a positive vision for the future of each area. Paragraph 16 states that Plans should "be prepared positively, in a way that is aspirational but deliverable", amongst other requirements. In assessing future needs for employment floorspace and land, this requirement for positive planning should be recognised.

4.7 There have been no further updates to **Planning Practice Guidance (PPG)** since the 2023 EDNA was prepared, and therefore the approach to assessing future needs remains as stated and includes a range of possible methods which include:

- Employment forecasts and projections (Labour Demand)
- Demographically derived assessment (Labour Supply)
- Past take-up of land and property, essentially projecting forward on the basis of past trends continuing.
- Consultations with relevant organisations, studies of business trends, an understanding of changing business models and monitoring of business, economic and employment statistics.

4.8 As noted in the 2023 EDNA, it is important to recognise that quantitative scenarios are a starting point for Local Plan economic growth policies, and that the output of these approaches must be supplemented with qualitative analysis in determining the detail of specific policies.

Employment-led Scenarios (Labour Demand)

Baseline Employment Forecasts

4.9 The 2023 EDNA presented 2022-based employment projections sourced from Cambridge Econometrics (CE). For the purposes of this update, 2024-based projections from CE have been procured, which take into account actual employment data releases from the ONS up to 2022 together with projections up to 2044. In addition, this update also considers projections from two other forecasting houses, namely Oxford Economics (November 2024) and Experian (November 2024), in order to compare and contrast and select the most appropriate set of forecasts for Thurrock to move forwards with. A summary of the approach used by each forecasting house is set out below.

- **Cambridge Econometrics (CE) forecasts prepared in April 2024 and informed by BRES 2022 data**. CE's projections are baseline economic projections based on historical growth in the local area relative to the region or UK (depending on which area it has the strongest relationship with), on a sector-by-sector basis. They assume that those relationships continue e.g. if a sector in the local area outperformed the sector in the region (or UK) as a whole in the past, then it will be assumed to do so in the future. They assume that economic growth in the local area is not constrained by supply-side factors, such as population and the supply of labour. Therefore, no explicit assumptions for population, activity rates and unemployment rates are made in the projections. They assume that there will be enough labour (either locally or through commuting) with the right skills to fill the jobs. If, in reality, the labour supply is not there to meet projected growth in employment, growth could be slower.

- **Oxford Economics (OE) forecasts produced in November 2024 and informed by BRES 2023 data**. OE's projections are based on determining workplace-based employees in employment in each of the broad 19 SIC2007 based sectors consistent with the regional and UK outlooks. At local authority level some of the sectors are driven predominantly by population estimates, others by total employment in the area and the remainder relative to the regional performance (largely exporting sectors). All sectors are also influenced by past trends in the local area. Taken in totality, employment is cross referenced with a number of variables (including population, relative performance across similar areas, historical cyclical performance and known policy) for checking and validation purposes. Where necessary, manual adjustments are made to the projected trends to reflect this validation process.
- **Experian forecasts produced in November 2024 and informed by BRES 2023 data**. Experian's local authority forecasts are run separately for the local authorities in each region and takes the regional forecast as given e.g. local forecasts are constrained to the regional forecasts of the parent region. The local model is based on the resolution of demand and supply for labour, and it considers commuting between local areas within a region and across the regional boundary. In parallel, demand for labour is estimated at the industry level by linking job growth in a local area to growth in the same industry at the regional level and then constraining demand for jobs by industry to demand for jobs for the same industry at the regional level. The supply and demand for labour is then resolved considering the inflow and outflow of workers across regional boundaries and historic commuting patterns at the local level as well as unemployment and participation rates.

  Experian make 'appropriate' adjustments to the forecast to consider certain large projects:

  - At the industry level they consider announced developments in that industry which are large enough to affect the growth in the industry at the national, regional or local level.
  - At the regional and local level, they consider announced developments or policies which are large enough to affect growth at the regional or local level.
  - The final forecast gives the net effect of the adjustment, after the effects of population constraints, job cannibalisation, commuting patterns etc have been accounted for.

Historic comparison of data from forecasting houses

4.10 It is useful to compare historic data from each forecasting house with historic Business Register Employment Survey (BRES) data for Thurrock (presented in Section 2 as part of the baseline analysis) in order to understand how closely aligned they are. We use the period dating back to 2015 as prior to this BRES used a different methodology for presenting their data, which is not directly comparable with the period after 2015.

4.11 According to BRES, employment in Thurrock grew by around 18.4% over the period 2015-2023, or by 2.1% per annum. Data from OE and Experian for the same period is more closely aligned with this trend than CE data, with both the former recording growth of 2% per annum, whilst CE suggests that growth has been substantially higher in absolute, percentage and annual growth rate terms (2.4% per annum) than BRES (Table 4.1).

Table 4.1: Historic Data Comparison of Forecasting Houses and BRES

	2015	2023	Abs Change	% Change	CAGR (%)
BRES	64,610	76,505	11,895	18.4%	2.1%
CE	72,129	87,386	15,257	21.2%	2.4%
OE	73,596	86,319	12,723	17.3%	2.0%
Experian	71,400	83,800	12,400	17.4%	2.0%

Source: CE, OE, Experian, BRES 2015-2023

4.12 Table 4.2 below shows a comparison of each forecasting house by broad sector change for the period 2015-2023 and highlights in orange where the data deviates noticeably from BRES data for the same period. Note that each forecasting house publishes sectoral employment projections using varying sectors. ekosgen, part of GC Insight, has aligned these into broad sector categories based on Standard Industrial Classification Codes (SIC Codes).

4.13 The sectors that are driving the large overall variation in the total CE projection from BRES and the other forecasting houses are Construction, where CE reported much larger growth (+4,326 job), and Education and Arts and Entertainment.

4.14 Whilst the CE projections vary the most substantially from BRES (and from OE and Experian) in terms of total employment levels, Experian has a greater number of variations amongst sectors including in several instances where declines in employment levels are reported compared to growth by BRES and other forecasting houses. Overall, OE is more closely aligned with BRES data for the period 2015-2023 for each sector.

Table 4.2: Historic Data Comparison of Forecasting Houses by Sector (Change 2015-2023)

	BRES	OE	CE	Experian
A: Agriculture, forestry and fishing	- 30	- 14	- 18	-
B: Mining and quarrying	20	23	38	-
C: Manufacturing	750	737	815	- 100
D: Electricity, gas, steam and air conditioning supply	80	6	- 2	-
E: Water supply; sewerage, waste management and remediation activities	- 325	- 118	- 90	-
F: Construction	2,500	2,762	4,326	2,500
G: Wholesale and retail trade; repair of motor vehicles and motorcycles	- 3,500	- 3,879	- 3,339	- 2,600
H: Transportation and storage	10,000	10,166	9,363	8,900
I: Accommodation and food service activities	250	428	1,358	1,500
J: Information and communication	100	173	87	- 100
K: Financial and insurance activities	125	141	- 3	-
L: Real estate activities	50	134	- 59	300
M: Professional, scientific and technical activities	125	358	145	- 200
N: Administrative and support service activities	- 1,000	- 1,152	- 746	- 400
O: Public administration and defence; compulsory social security	3,500	3,516	3,889	3,000
P: Education	-	66	251	400

	BRES	OE	CE	Experian
Q: Human health and social work activities	- 1,000	- 1,059	- 1,273	- 400
R: Arts, entertainment and recreation	250	286	695	100
S: Other service activities	-	148	- 183	- 500
Total	**11,895**	**12,723**	**15,254**	**12,400**

Source: CE, OE, Experian, BRES 2015-2023

Future comparison of data from forecasting houses (2024-2044)

4.15 Going forward, all three forecasting houses are projecting growth rates in total employment of less than 1% per annum, which is far lower than the historic trends reported by all forecasting houses.

4.16 Both OE and Experian are projecting similar levels of growth over the plan period (c14,600 or 0.8% per annum). However, Experian is starting from a lower base in 2024 and therefore finishes at a lower overall employment level than OE, despite slightly higher levels of absolute growth projected. This is due to the differences in approaches between the two forecasting houses.

4.17 OE is projecting high levels of growth over the next five years in particular (1.2% p.a.), although this is still lower than historic trends (c2-2.1% p.a.) Experian and CE both project fairly consistent levels of growth over the twenty-year period, albeit CE growth levels are lower.

4.18 It is particularly interesting to note that CE's projected growth rate of 0.3% per annum is below that of Experian and OE's projections (0.8% per annum respectively), well below CE's reported historic growth rate (2.4% per annum) and well below the previous iteration of CE projections that were used in the 2023 EDNA (0.6% per annum). This results in CE projecting total employment growth for the period 2024-2044 of 5,840 jobs, compared to around 11,000 for the period 2020 to 2040 in the 2023 EDNA. According to their latest projections, growth in employment between 2020 (the start of the 2023 EDNA forecasting period) and 2024 (the start of the updated EDNA forecasting period) has been around 3,400 jobs, which does not account for the full difference between 11,000 and 5,840 projected jobs for 2020-2040 and 2024-2044 respectively. The remaining difference is accounted for by much lower rates of growth projected in certain sectors than previously, including construction, transport and storage and business and administration services.

Table 4.3: Comparison of Future Projections from Forecasting Houses

	2024	2044	Abs Change	% Change	CAGR (%)
CE	87,646	93,486	5,840	6.7%	0.3%
OE	87,130	101,703	14,574	16.7%	0.8%
Experian	85,000	99,600	14,600	17.2%	0.8%

Source: CE, OE, Experian, BRES 2015-2023

4.19 Table 4.4 below shows the employment projections from each forecasting house for the period 2024-2044 by change in each broad sector. Key points to note are:

- All forecasting houses are projecting a decline in the manufacturing sector, although Experian to a much lesser extent than OE and CE.
- CE is projecting substantially lower growth in a number of sectors compared to OE and Experian, most noticeably in the construction, wholesale and retail trade and transport and storage sectors.

- Experian is projecting much more substantial growth in the accommodation and food services sector compared to both CE and OE (and also reported much higher historic growth levels in this sector compared to BRES).
- OE is projecting more substantial growth in human health and social work activities compared to CE and Experian.
- There is substantial variation between all forecasting houses when it comes to projecting growth in the construction sector, ranging from an increase of 910 jobs by CE to 2,800 jobs by OE.

Table 4.4: Employment Projections by Sector (Change 2024-2044)

	OE	CE	Experian
A: Agriculture, forestry and fishing	- 14	- 56	-
B: Mining and quarrying	- 14	- 24	-
C: Manufacturing	- 1,006	- 1,013	- 100
D: Electricity, gas, steam and air conditioning supply	- 31	72	-
E: Water supply; sewerage, waste management and remediation activities	- 75	- 1	100
F: Construction	2,803	910	1,500
G: Wholesale and retail trade; repair of motor vehicles and motorcycles	2,027	574	2,200
H: Transportation and storage	4,072	1,636	4,300
I: Accommodation and food service activities	545	555	1,200
J: Information and communication	239	234	100
K: Financial and insurance activities	37	- 179	100
L: Real estate activities	49	284	200
M: Professional, scientific and technical activities	940	606	900
N: Administrative and support service activities	1,391	1,186	1,500
O: Public administration and defence; compulsory social security	206	159	- 100
P: Education	1,088	69	1,100
Q: Human health and social work activities	1,636	803	1,200
R: Arts, entertainment and recreation	426	63	200
S: Other service activities	256	- 38	200
Total	**14,574**	**5,840**	**14,600**

Source: CE, OE, Experian

4.20 Based on the comparison of forecasts with each other, by sector and alignment with historic trends, as well as our detailed understanding of Thurrock, it is our recommendation that for the purposes of this update, the employment projections produced by OE are the most suitable to use to inform future land requirements under the labour demand scenarios. The OE employment projections are set out in full in Table 4.5 below.

Table 4.5: OE Employment Projections by Sector (Change 2024-2044)

OE Sectors	2024	2044	Change	% Change	CAGR (%)
Agriculture, forestry and fishing	166	152	-14	-9%	-0.4%
B: Mining and quarrying	27	14	-14	-50%	-3.4%
C: Manufacturing	3,484	2,477	-1,006	-29%	-1.7%
D: Electricity, gas, steam and air conditioning supply	199	168	-31	-16%	-0.9%
E: Water supply; sewerage, waste management and remediation activities	1,080	1,006	-75	-7%	-0.4%
F: Construction	8,113	10,917	2,803	35%	1.5%
G: Wholesale and retail trade; repair of motor vehicles and motorcycles	16,468	18,495	2,027	12%	0.6%
H: Transportation and storage	21,260	25,332	4,072	19%	0.9%
I: Accommodation and food service activities	4,865	5,410	545	11%	0.5%
J: Information and communication	1,156	1,395	239	21%	0.9%
K: Financial and insurance activities	700	737	37	5%	0.3%
L: Real estate activities	817	867	49	6%	0.3%
M: Professional, scientific and technical activities	3,145	4,085	940	30%	1.3%
N: Administrative and support service activities	6,285	7,675	1,391	22%	1.0%
O: Public administration and defence; compulsory social security	4,914	5,120	206	4%	0.2%
P: Education	6,132	7,219	1,088	18%	0.8%
Q: Human health and social work activities	5,153	6,789	1,636	32%	1.4%
R: Arts, entertainment and recreation	1,421	1,847	426	30%	1.3%
S: Other service activities	1,743	1,999	256	15%	0.7%
Total	**87,130**	**101,703**	**14,574**	**17%**	**0.8%**

Source: Oxford Economics

Translating Employment Projections to Floorspace and Land Use Requirements

4.21 A series of steps and assumptions are required in order to determine the implications of the OE sectoral-based employment projections on the demand for office, industrial and warehousing land and floorspace. The first of these steps is to consider the relationship between employment change in the different sectors and the requirements for business land and premises. In order to do this, it is necessary to allocate a proportion of jobs in each OE sector to office, industrial and warehousing planning Use Classes (E(g)(i-iii), B2 and B8).

4.22 Given the diversity of activities that exists within sectors, it is necessary to estimate the proportion of jobs requiring each type of Use Class in each sector. These proportions are then applied to the sector forecasts to estimate the number of future jobs requiring different types of floorspace. Assumptions on the proportion of jobs in each sector requiring different Use Classes has been based on the consideration of Thurrock employment data at the 5-digit SIC level[15] and their fit with the land use categories following categories that correspond with the amended Use Classes Order (introduced in September 2020):

- Office
  - E(g)(i) – Offices to carry out any operational or administrative functions (B1 (a) under the former Use Class Order)
  - E(g)(ii) – Research and development of products or processes (B1 (b) under the former Use Class Order)
- Industrial
  - E(g)(iii) – Industrial processes ('light industrial') (B1 (c) under the former Use Class Order)
  - B2 – General industry ('industrial') (as per the former Use Class Order)
- Warehousing
  - B8 – Storage and distribution ('warehousing') (as per the former Use Class Order)

4.23 Appendix 1 provides details on the categorisation of each 5 digit SIC code assumed land use requirements.

4.24 In addition to the above, the following assumptions are applied to the employment growth estimates within these use classes:

- Employment estimates are expressed as Full-Time Equivalent (FTE) jobs which are determined having regard to the ratio of full-time to part-time employees at the 2-digit SIC level for Thurrock before applying a general assumption that every 1 full-time employee is equivalent to 2 part-time employees.
- An allowance for the propensity of homeworking, having regard to ONS Annual Population Survey data on homeworking by industry at the national level[16].

4.25 The outcome of the above steps is set out in **Table 4.6** and indicates that FTE employment across all sectors is projected to increase by 9,970 (+16.2%). Within the E(g), B2 and B8 sectors is projected to increase by 4,800 FTEs (+14.6%). Growth in the B8 sector accounts for the largest share of this (+3,195). In comparison, growth in other sectors of the economy is projected to grow at a higher rate of 17.9%.

[15] ONS Business Register and Employment Survey, 2023.

[16] ONS Annual Population Survey Table 3 - Homeworking by Industry Sector in the UK, January to December 2020

Table 4.6: OE FTE Employment Projections by Land Use Type

	Office	Industrial	Warehousing	Total	Other Uses Total
2024	6,981	8,288	17,558	32,827	28,807
2044	8,299	8,576	20,753	37,628	33,975
Change	1,318	288	3,195	4,802	5,168
% Change	18.9%	3.5%	18.2%	14.6%	17.9%
CAGR (%)	0.9%	0.2%	0.8%	0.7%	0.8%

Source: OE Forecasts, 2024-2044; ekosgen part of GC Insight

4.26 In order to convert the FTE employment to estimated floorspace and land use requirements, the following next steps are taken:

- **Convert FTEs to floorspace:** for each use-class we need to estimate the average amount of floorspace required for each FTE. The standard approach is to use employment densities from the HCA Employment Densities Guide[17]. The following densities have been applied:
  - Office - Use Class E(g)(i): 11.6 sq. m per FTE (average of office sub-sectors)
  - Research and development - Use Class E(g)(ii): 50 sq. m per FTE (mid-point)
  - Light Industrial – Use Class E(g)(iii): 47 sq. m per FTE
  - Industrial – Use Class B2: 36 sq. m per FTE
  - Warehousing – Use Class B8: 73.5 sq. m per FTE (average of B8 sub-sectors)
- **Allowance for vacancy**: this adjustment can be added to the floorspace estimates to allow for a normal level of vacancy in the supply of space to allow for reasonable choice for potential occupiers. In this instance, a vacancy allowance of 7.5% has been added to all sectors based on reasonable vacancy rates typically being between 5-10%.
- **Convert floorspace to land requirements**: this relates to the relationship between the quantity of floorspace and typical plot sizes for different use classes (the plot ratio). This relationship can vary significantly depending on the nature of development in different parts of Thurrock. For instance, a new office development in the centre of a town centre is likely to have a much higher plot ratio than a new business park development – of which there are very few in Thurrock. The plot ratios below should therefore only be used as broad guidance and should not be applied in a mechanistic way but should consider the circumstances of each location separately when deciding what plot ratios to apply. For the purposes of this assessment, we have applied the following plot ratios which are consistent with the 2023 EDNA:
  - Office - Use Class E(g)(i): 2
  - Research and development - Use Class E(g)(ii): 0.95
  - Industrial (Use Classes E(g)(iii) and B2): 0.4
  - Warehousing – Use Class B8: 0.4

[17] Homes and Community Agency (2015) Employment Density Guide, Fourth Edition

4.27 The outputs of the above steps are set out below (Table 4.7) and expressed as net requirements for Gross External Floorspace (GEA) and Hectares (ha) of land.

4.28 According to the labour-demand baseline scenario, there is a requirement for 22,569 sq. m of office equating to 1.32 ha in total. For general industrial and warehousing use classes, the requirement is for 264,839 sq. m and 66.2 ha, the large proportion of which is for warehousing (B8) uses.

Table 4.7: Floorspace and Land Use Requirements 2024-2044, Labour Demand Baseline Scenario

	Floorspace (sq. m GEA)	Land (Ha)
Office (Use Class E(g)(i-ii)	22,569	1.32
Industrial (Use Class E(g)(iii) & B2)	12,056	3.01
Warehousing (Use Class B8)	253,905	63.48
Total	**288,529**	**67.81**

Source: OE Forecasts, 2024-2044; ekosgen part of GC Insight

4.29 Whilst we are recommending the use of the OE projections, for further comparison purposes, it is helpful to set out (Table 4.8) the FTE employment, floorspace and land use requirements that would result from using each of the different forecasting houses employment projections considered earlier in this section. The same assumptions and steps, as described above, have been undertaken for each forecasting house to derive FTE employment, floorspace and land uses by land use types. The land requirements range from 24.67 ha under the CE projections u to 74.72 ha under the Experian projections. The OE projections present the middle scenario when compared to Experian and CE although there is minimal variation in estimated requirements between the former and OE.

Table 4.8: Comparison of Employment, Floorspace and Land use Requirements (2024-2044)

	Office	Industrial	Warehousing	Total
Total FTEs				
OE baseline	1,319	288	3,195	4,802
CE baseline	861	-285	1,348	1,924
Experian baseline	1,247	797	3,285	5,329
GEA Floorspace Requirements Allowing for Vacancy (sq. m)				
OE baseline	22,569	12,056	253,905	288,529
CE baseline	14,201	-11,605	107,087	109,682
Experian baseline	21,80	32,085	261,059	315,244
Total Employment Land Requirements (ha)				
OE baseline	1.32	3.01	63.48	67.81
CE baseline	0.8	-2.9	26.77	24.67
Experian baseline	1.26	8.2	65.26	74.72

Source: ekosgen part of GC Insight

Labour Demand – Higher Growth Scenario

4.30 Although the OE projections take into account regional and national outlooks, they do not take into account locally specific future drivers of growth within certain sectors of the economy, such as emphasis in local policy and strategy on priority sectors for growth and planned local infrastructure changes. Nor do they take into account the full extent of potential activity that could take place on sites in Thurrock designated within the Thames Gateway Freeport.

4.31 It is therefore considered appropriate to assess a higher growth scenario, which adjusts the growth of certain sectors of the economy based on their identification as growth and opportunity sectors highlighted in Section 2. These are:

- Ports and Logistics
- Construction
- Business Services
- Retail
- Hospitality, Recreation and Leisure
- Environmental Technology and Green Energy
- Creative Industries

4.32 In addition to the above priority/growth sectors, we have also considered Advanced Manufacturing given recent discussions with Freeport land holders suggesting increased inward investment interest in this sector, the capacity within Thurrock to expand this sector as well as it being identified in the National Industrial Strategy as a growth sector.

4.33 The Table overleaf provides a summary of each sector in turn, current performance and the rationale for making any adjustments or not. The rationale has been informed by discussions with Freeport land holders, the Thames Freeport Scoping Study, the Council's economic development team, local, sub-regional and national policy considerations and consideration of past - performance, size and specialisation in Thurrock.

Table 4.9: Growth Sectors and Rational for Adjustment to OE Sectors

Growth Sector	Current and historic performance (BRES)	Relevant OE Sector(s)	OE Projections 2024-44	Upward Adjustment?	Rationale
Ports and Logistics	Currently accounts for around 18,000 jobs in Thurrock (23.4%), more than doubled since 2015 at a CAGR of 9.8% p.a. Highly specialised sector for Thurrock with an LQ of 5.9 when compared to England.	H: Transportation and storage	H: CAGR of 0.9% p. a	Yes	OE are projecting growth of 4,072 jobs in this sector at a rate of 0.9% per annum which is well below historic growth levels. The Thames Gateway Freeport Business Case and recent discussions with Freeport landholders implies that the Freeport Sites and associated masterplans have capacity to deliver substantially more jobs than this, although a proportion of them will also fall within other sectors, including Advanced Manufacturing and the Environmental technology and Green Energy sectors. The previous EDNA estimated that over 20,000 jobs could be accommodated on the available Freeport Sites, with over two thirds associated with Use Class B8. Subsequent discussions with Freeport landholders and evidence of recent take up at London Gateway have indicated a higher proportion of these jobs would likely fall within the manufacturing sector, including advanced manufacturing (Use Class B2) than was previously considered. In terms of the quantum of jobs, the on-going economic, financial and geopolitical uncertainty at national and global scale is having an impact on the delivery and pace of sites coming forward at the Freeport compared to when the 2023 EDNA was prepared (see national outlook in section 2). The Thames Freeport Scoping Study also acknowledges this, recognising the difficulties in quantifying any potential multiplier effects from Freeport activities due to high levels of uncertainty and potential differences between the orginal business case projections and the current situation. It is nonetheless clear that the OE projections are unlikely to account for all of the potential growth in this sector over the Plan period given the status and availability of Freeport sites. **Recommendation:** to increase growth rate to 2.25% p.a. applied to sector H. This is between two and three times the OE projected growth rate and takes into account the fact that OE projections may already include some growth associated with the Freeport, as well as the potential for a lower proportion of the jobs at the Freeport sites to be within this sector than previously considered.
Construction	Currently accounts for 5,750 jobs in Thurrock (7.5%) having increased by 6.4% per annum since 2015; Growth has remained fairly static in the sector since 2019, however. Twice as specialised as the national average and largest sub-sector is specialised construction activities	F: Construction	CAGR of 1.5% p.a.	Yes	OE are projecting growth of 2,800 jobs at a rate of 1.5% p.a. which is well below historic growth rates but higher than in recent years. Demand for construction products and services relating to retrofitting housing as well as the scale of demand for new housing across London and the Southeast is driving opportunities in the sector, particularly at the Freeport where there is the opportunity for a Sustainable Construction Model to evolve. Several major companies are already located in Thurrock and construction of Freeport and recently approved LTC, which are unlikely to have been considered already in OE projections, may drive higher levels of growth. **Recommendation:** modest increase of growth rate to 2% p.a. applied to Sector F.

Growth Sector	Current and historic performance (BRES)	Relevant OE Sector(s)	OE Projections 2024-44	Upward Adjustment?	Rationale
Business Services	Currently accounts for 5,000 jobs having recently seen a decline of around 1,500 jobs (-2.6% per annum).	N: Administrative & support service activities	CAGR of 1.0% p.a.	No	Recent sector decline, continued hybrid working patterns and limited office market in Thurrock suggest little scope for further growth beyond OE projections of 1.0% p.a.
Retail	Currently accounts for around 12,500 jobs in Thurrock having seen a decline since 2015 of almost 3,000 jobs (-2.7% p.a.). 1.6 x specialised compared to England.	G: Wholesale and retail trade; repair of motor vehicles and motorcycles	CAGR of 0.6% p.a.	No	Recent decline and continued cost of living crisis suggests no basis for adjusted growth of retail sector specifically. OE growth rate of 0.6% p.a. seems reasonable for wholesale sector and taking into account town centre regeneration plans.
Hospitality, Recreation and Leisure	Currently accounts for over 5,275 jobs in Thurrock having increased by 15% since 2015 (less than 500 jobs in absolute terms) at a rate of 1.8% p.a.	I: Accommodation and food service activities; R: Arts, entertainment and recreation	I: CAGR of 0.5% p.a.; R: CAGR of 1.3% p.a.	No	Not currently specialised in Thurrock and majority of employment is within restaurants, cafes and takeaways. Whilst increased housing and population growth will create additional demand, cost of living crisis continues to exert downwards pressure. OE growth rates seem reasonable. Not relevant for office, industrial and warehousing sectors.
Environmental technology and Green Energy	Currently accounts for 1,485 jobs in Thurrock having seen very small increase since 2015 (0.6% p.a.), slightly more specialised than national average with LQ of 1.4	E: Water supply; sewerage, waste management and remediation activities and D: Electricity, gas, steam and air conditioning supply	E: CAGR of -0.4% p.a; D: CAGR of -0.9% p.a.	Yes	OE are projecting a decline in this sector despite positive historic growth rates. National and local prioritisation of this sector together with Freeport activity, in particular at Thames Enterprise Park, means future growth rather than decline is more likely. Research by the LGA[18] on local green jobs in Thurrock, indicates Thurrock will need 1,850 green energy jobs by 2030 and 2,900 by 2050. Comparable data for the present year is not available however, the 2030-2050 projections imply a growth rate of 2.3% per annum. **Recommendation:** apply LGA research growth rate of 2.3% p.a to Sectors E and D
Creative Industries	Currently accounts for less than 500 jobs in Thurrock but has seen growth since 2015 of over 50%. Currently under-represented compared to England with LQ of less than 1(0.2)	Cross-cutting with C, I, M and R	CAGR varies from -1.7% p.a. (manufacturing) to +1.3% p.a.	No	Sector is currently extremely small and under-represented and whilst there are aspirations for growth and future projects to support this, OE growth levels are already likely sufficient to account for this.

[18] Local Government Association, accessed at: [Local green jobs - accelerating a sustainable economic recovery in Thurrock | LG Inform]()

Growth Sector	Current and historic performance (BRES)	Relevant OE Sector(s)	OE Projections 2024-44	Upward Adjustment?	Rationale
Advanced Manufacturing	Overall manufacturing accounts for a relatively small number of jobs in Thurrock (3,335) and has grown by 2.9% p.a. since 2015. Estimated that advanced manufacturing accounts for c25% of all manufacturing jobs in Thurrock but has not grown to quite the same extent (2.3% p.a.)	C: Manufacturing	CAGR of -1.7% p.a.	Yes	OE are projecting a decline in the manufacturing sector overall compared to strong historic growth levels amongst certain sub-sectors. Combined with national support for the sector and the potential for the sector to expand within Thurrock as part of the Freeport delivery, it is reasonable to assume job growth could occur. The Freeport business case, discussions with Freeport landholders and the availability of sites at the Freeport implies capacity to deliver substantial jobs growth. Recent discussions with Freeport landholders have indicated a higher proportion of jobs than previously considered could be within manufacturing and advanced manufacturing sectors. The previous EDNA estimated around 8,000 jobs could be accommodated across the manufacturing sector as a result of the Freeport Sites coming forward, a higher proportion would indicate around 10,000. This would suggest a significant step change in growth far exceeding historic growth rates (2.3% - 2.9%). However, the on-going economic, financial and geopolitical uncertainty at national and global scale is having an impact on the delivery and pace of sites coming forward at the Freeport compared to when the 2023 EDNA was prepared (see national outlook in section 2). **Recommendation:** increase OE growth rate for Sector C to 5% p.a. This would not achieve a growth of 10,000 jobs but is considered reasonable given relatively small size of sector to date, historically lower growth rates and uncertainties around degree of uncertainty around delivery timings and sectors of Freeport Sites.

4.34 The adjustments to the sectors outlined above result in a forecast increase from 87,129 jobs in 2024 to 118,295 jobs by 2044 (+ 31,165 jobs), before any adjustments are made for FTEs and Working from Home. This equates to slightly more than double the OE Baseline forecast increase of 14,574 over the same period.

4.35 As with the baseline labour demand projection, we have converted the higher growth scenario into requirements for office, industrial and warehouses land uses and then into requirements for floorspace and land use following the same steps and assumptions described under the baseline scenario. This takes into account converting projected jobs to full-time-equivalent jobs for each sector, taking into account working from home trends, applying employment densities and plot ratios.

4.36 Table 4.10 below sets out the future employment floorspace and land use projections under the labour demand higher growth scenario and compares this with the labour demand baseline scenario. Under a higher growth scenario, floorspace requirements between 2024 and 2044 are projected to total just under 1m sq. m and land requirements 245.65 ha.

Table 4.10: Labour Demand Higher Growth Scenario - (2024-2044)

	Office	Industrial	Warehousing	Total
Total FTEs	1,319	6,929	8,728	16,975
GEA Floorspace Requirements Allowing for Vacancy (sq. m)	22,569	283,827	693,490	999,886
Land Requirements (ha)	1.32	70.95	173.37	245.65

Source: ekosgen part of GC Insight

4.37 This scenario results in a lower projection of future requirements when compared to the 2023 EDNA higher growth scenario (342 ha). The approach to deriving a higher growth scenario in the 2023 EDNA was part informed by a supply-led approach when considering the impact the Freeport status would have on future employment growth. It accounted for all available supply coming forward at the Freeport sites within the plan period for example. It also took into consideration potential for jobs associated with town centre regeneration plans across Thurrock and the impact of LTC. Since the 2023 EDNA was produced, economic circumstances have changed and there is a greater degree of uncertainty around the assumptions that were used to inform the 2023 approach, particularly around the types of uses and the amount of floorspace coming forward at the Freeport. This Update therefore adopts a different approach and considers the prospects of identified growth sectors and in doing so has reflected a slower pace of development at the Freeport, LTC and Town Centre Regeneration schemes sites than previously anticipated.

Labour Demand – Mid Growth Scenario

4.38 We have also considered a mid-growth scenario, which adopts a more cautious view of potential future growth sectors reflecting on-going levels of uncertainty in the economic climate and geo-political instability at the time of drafting. On this basis, the adjustments made to the growth sectors identified in Table 4.11 are as follows:

- Ports and Logistics: 1.8% p.a. (double the 0.9% p.a. under the baseline scenario but still below the 2.25% under the higher growth scenario)

- Construction: 1.5% p.a. (in line with the baseline scenario and compared to 2% p.a. under the higher growth scenario)
- Environmental technology and Green Energy: 1.15% p.a. (compared to -0.4% to 0.9% under the baseline scenario and 2.3% p.a. under the higher growth scenario)
- Advanced Manufacturing: 2.9% p.a. (in line with historic growth rates and compared to 1.75 p.a. under the baseline scenario and 5% p.a. under the higher growth scenario).

4.39 This results in an overall requirement for 709,750 sq. m of floorspace and 173.12 ha of land under the mid-growth scenario.

Table 4.11: Labour Demand – Mid-Growth Scenario (2024-2044)

	Office	Industrial	Warehousing	Total
Total FTEs	1,319	3,674	6,752	11,745
GEA Floorspace Requirements Allowing for Vacancy (sq. m)	22,569	150,673	536,513	709,754
Land Requirements (ha)	1.32	37.67	134.13	173.12

Source: ekosgen part of GC Insight

Labour Supply Scenario

4.40 In addition to the employment-led scenario, which represents a labour demand driven view of the future requirements, the 2023 EDNA also considered a labour supply scenario. This scenario assessed the implications for jobs growth of changes in the population and labour force in Thurrock. The 2023 EDNA drew on projections generated as part of the South Essex Housing Needs Assessment (Turley 2022) which modelled the population and subsequent labour force growth implications of future housing needs. These projections have subsequently been updated by Turley in their 2025 Thurrock Housing Market Assessment.

4.41 On this basis, Turley's projected job growth supported by meeting housing need equates to around 16,876 jobs under the Standard Method for assessing housing needs and using a commuting ratio based on 2011 census data, and around 20,009 jobs using a commuting ratio based on the 2021 census data. The latter figure implies that Thurrock is a more modest exporter of labour than previously and the labour force from additional housing could therefore support further job growth within the authority itself. Turley recommend use of the 2021 commuting ratio.

4.42 In order to translate the labour supply jobs projection (20,009) into floorspace and land requirements, FTE and WfH assumptions are applied to the projections (using the same assumptions as under the labour demand scenarios) and then apportioned to Use Classes based on the proportions under the labour-demand baseline scenario for 2024 and 2044. This gives rise to an estimated projection of 6,777 additional FTEs in office, industrial and warehousing sectors over the time period.

4.43 Relevant employment densities and plot ratios are then applied and an allowance for vacancy (7.5%) is included in order to translate the FTEs into additional floorspace and land requirements. Table 6.10 below summarises the outcome and indicates that under the labour supply scenario, around 401,745 sq. m of floorspace would be required equating to 94.67 ha.

4.44 The overall floorspace requirement is lower than the 2023 EDNA in part because of a lower labour supply figure derived from the standard method but also due to changes in the sectoral structure of the economy anticipated in the updated OE projections compared to the CE projections used in the 2023 EDNA. The land requirement derived from this scenario is however broadly comparable to the 2023 EDNA because of the higher share of B8 land requirements which are more land hungry than other sectors of the economy.

Table 4.12: Labour Supply Floorspace and Land Requirements

	Office	Industrial	Warehousing	Total
FTEs	1,770	689	4,318	6,777
Floorspace (GEA sq. m)	30,057	28,590	343,098	401,745
Land (ha)	1.75	7.15	85.77	94.67

Source: Turley, ekosgen part of GC Insight

Past Trends Scenario

4.45 Using historical development rates as a basis for projection is a viable alternative to labour demand-led approaches. Long-term trends reflect economic cycles, encompassing periods of growth and recession. Under this scenario, the 2023 EDNA used monitoring data on employment development activity provided by Thurrock Council covering the period 2007/08 to 2021/22 to estimate average annual completion rates and use these a basis for projecting forwards over the plan period.

4.46 The data indicated average annual completion rates of 45,519 sq. m, adjusted to 40,797 sq. m having excluded the 200,000 sq. m Amazon Fulfilment warehouse development in 2017/18, which was considered as an anomaly. Since the EDNA 2023 was published, two further years of monitoring data has been collated indicating average annual completions of 47,981 sq. m or 35,933 sq. m once the 2017/18 anomaly is removed.

4.47 **Table 4.13** below provides an updated extrapolation of these trends over the future plan period (2024-2044) based on the last five-year, ten-year and entire monitoring period (2007/08 to 2023/24) averages and also excluding the 2017/18 Amazon development. This suggests an overall need for between 718,664 sq. and 1.14 million sq. m of B1-B8 floorspace, the majority of which is for B8 floorspace.

Table 4.13 Projections of Past Completions – Floorspace (sq. m)

	Former B1 Use Classes	B2	B8	Total
Based on last 5-year average	85,095	88,539	970,803	1,144,436
Based on last 10-year average	120,264	73,510	844,117	1,037,890
Based on entire period average (2007/08-2023/24)	96,357	101,328	521,094	718,779

Source: Thurrock Council Monitoring Data; ekosgen part of GC Insight

4.48 It is also interesting to note that the council's monitoring data indicates that since 2013/14, 328,578 sq. m of floorspace has been completed at London Gateway and that this accounts for 53.8% of all completed employment floorspace (excluding the Amazon Fulfilment warehouse completed in 2017/18) for the entire monitoring period. Excluding developments at London

Gateway (and excluding the Amazon Fulfilment Centre), the average annual completions for employment floorspace in Thurrock has been 16,605 sq. m, including 5,711 sq. m per annum of B8 space and 6,749 sq. m of mixed B1-B8 space.

4.49 To convert the projected floorspace requirement into land requirements, standard plot ratios have been used as described earlier in this section. The exception to this is for E(g)(i-iii)/B1 space which cannot be disaggregated and includes a mix of higher density office uses and lower density R&D and light industrial uses. A plot ratio of 1:1 has been used in this instance. For Mixed B1-B8 floor space, the projection has been evenly distributed among B1, B2, and B8 spaces due to the lack of more specific data.

Table 4.14: Past Completions Scenario Land Requirements (ha) (exc. anomaly)

	Former B1 Use Classes	B2	B8	Total
Based on last 5-year average	8.5	22.1	242.7	273.3
Based on last 10-year average	12.0	18.4	211.0	241.4
Based on entire period average (2007/08-2023/24)	9.6	25.3	130.3	165.2

Source: Thurrock Council Monitoring Data; ekosgen part of GC Insight

4.50 On this basis, the future requirements for each Use Class for the period 2024 to 2044, are as follows:

- Requirement for between 8.5 and 12 ha of B1 (Use Class E(g)(i-iii)) employment land
- Requirement for between 18.4 and 25.3 ha of B2 employment land
- Requirement for between 130 and 242 ha of B8 employment land
- A total requirement for between 165 and 273 ha of employment land

4.51 For comparison purposes, when the 2017/18 Amazon Fulfilment warehouse development is not excluded from the data, this gives rise to a total requirement for around 340 ha of employment land, 308 ha of which is for B8 uses.

Comparison with Valuation Office Agency data

4.52 The 2023 EDNA provided a comparison of past-take up trends with data from the Valuation Office Agency (VOA) which provides time series data on floorspace stock by type. Using this data it is possible to analyse how the stock of floorspace in Thurrock has changed over time. The data has been updated since the 2023 EDNA and according to the latest available data, over the twenty-three years to 2022/23, office floorspace in Thurrock has increased by 23,000 sq. m (+43%) or an average of 1,000 sq. m per annum, and industrial space has increased by 703,000 sq. m (+68%) or an average of 30,600 sq. m per annum.

4.53 For office space, the growth in stock largely occurred in the first half of the twenty-year period and since 2016/17 there has been a decline in stock of around 6,000 sq. m. For industrial space, the growth has been more balanced over the last twenty years, but with the greatest proportion occurring in the last decade with over 512,000 sq. m (average of 51,200 per annum) added to the total stock.

Table 4.15: VOA Historic Floorspace Data, Stock and Change Over Time (sq. m, '000)

	2000/01	2022/23	Total Change	% Change	CAGR (%)
Office	54	77	23	42.6%	1.6%
Industrial	1,042	1,745	703	67.5%	2.3%
Total non-resi[19]	1,639	2,353	714	43.6%	1.6%

Source: Valuation Office Agency

4.54 Unfortunately, the VOA does not allow for a breakdown between industrial and warehousing space and so is not directly comparable with the council's monitoring data. However, it is nonetheless a useful consideration. The average change in stock for industrial space based on the VOA data is 30,600 sq. m per annum which is closest to the average completions of B2 and B8 space combined from the entire monitoring period (2007/08 to 2023/24), but well below the five and ten year average from past completions data.

Comparison with Net Absorption Data

4.55 Net absorption measures the difference between total space leased and total space vacated over a specific time period and is a useful metric for understanding supply and demand of floorspace and the health of the commercial property market. Net absorption data is summarised below for the office and industrial market together with implications for floorspace and land requirements and suggests that:

- For the **industrial market**, average annual net absorption rates for the last ten years have been 52,038 sq. m per annum and 26,560 sq. m per annum over the last five years. Projecting these rates forward over the plan period implies a requirement of between 531,201 and 1.04m sq. m of industrial floorspace or 133 to 260 ha of land for the period 2024 to 2044.

  The ten-year period includes data from 2017 when the Amazon fulfilment centre was completed which, as with completions data, has a significant impact on the annual average estimated for this period. In order to make a comparison with the past completions data, we have extracted this year from the ten-year period between 2015 and 2024 which results in an average net absorption rate of 29,999 and a forward projection of 599,980 sq. m equating to a future land requirement of around 150 ha.

  Floorspace and land requirements projected on this basis are lower than the requirements projected using past-completions data for B8 and B2 uses based on five- and ten-year averages, but broadly in line with the entire period past completions average (2007/08-2023/24). **This lends caution to relying on past-completions data in the short-term given that net absorption measures space that is actually being occupied and therefore supporting employment activities**.

- For the **office market**, average annual net absorption rates for the last five years have been slightly negative at -7 sq. m per annum meaning that on average, more space has been vacated than leased. Over the last ten years, net absorption rates have averaged 632 sq. m

[19] This includes retail and other non-residential uses

per annum. Projecting these rates forward over the plan period implies a requirement of between -147 and 12,643 sq. m of office floorspace for the period 2024 and 2044. The upper end of this range is similar to the projection based on the five-year average for past completions of E(g)(i-iii) space, although these figures are not directly comparable given E(g)(i-iii) space also includes R&D and light industrial uses.

Table 4.16: Net Absorption Rates

Year	Office (sq. m)	Industrial (sq. m)
2024	-3,650	36,777
2023	1,072	8,901
2022	3,213	-5,694
2021	-96	24,276
2020	-576	68,541
2019	-877	34,986
2018	1,552	85,052
2017	*-84*	*250,389*
2016	2,606	-11,633
2015	3,161	28,791
Five Year Average	-7	26,560
Ten Year Average	632	52,038
Ten Year Average (exc. 2017 data)	-	29,999

Source: ekosgen part of GC Insight; Aspinall Verdi and CoStar

Supply-side Adjustments

4.56 As with the 2023 EDNA, there are potentially two adjustments to be made to the overall requirements for employment land, these are:

- Replacement demand (or sometimes referred to as Windfall allowance) which considers the extent to which the council needs to replace potential future losses of employment land; and
- A safety margin which considers the extent to which the council needs to allow for friction, variety and uncertainty but including a 'buffer'.

4.57 There are no changes in approach to these assumptions compared to the 2023 EDNA, for completeness, these are explained below.

Replacement Demand

4.58 The employment-led scenarios described so far have modelled the floorspace and land required to support future jobs growth. These estimates represent the net requirement for floorspace and do not take account of the fact that some occupied floorspace will be lost over the plan period to other uses. If so, this could generate demand from existing occupiers who have had to leave their current premises (we refer to this as replacement demand).

4.59 Forecasting the level of replacement demand in future is subject to significant uncertainty. There is an implicit assumption in the employment-led modelling that growing businesses will be able to use the floorspace which is vacated by declining businesses, but in reality, this is not always the case and there is sometimes a need to replace premises which are lost to other uses or are no longer fit for purpose. The VOA data for office space indicates there has been a decline in office stock of around 3,000 sq. m of office space over the last five years whilst at the same time there have been year on year gains in industrial floorspace. The Council's own monitoring data also indicates minimal losses to date in either office or industrial floorspace.

4.60 The commercial property market review and the site reviews undertaken within the ELAA indicated a number of sites are in need of investment in order to address poor quality infrastructure, constrained circulation and limited condition with a number recommended for deallocation amounting to 56.9 ha. It is noted in some cases sites still had high levels of occupancy and multiple ownerships where investment strategies may be constrained and therefore replacement or alternative provision may be required.

4.61 There are a number of ways in which the Council could respond to this.

- Forecast the quantity of floorspace that will be lost in the future (e.g. the rate of loss over the last five years) and assume that a high proportion of this space will need to be replaced. The constraint here is a lack of robust or scientific way of forecasting how much space will be lost given the current and historic data doesn't reflect a pattern of losses, and the assumption could be subject to high degrees of variation.
- Make an upward adjustment to the preferred scenario of say 10% to 20% to allow for replacement – whilst a simple approach it is based on a fairly arbitrary assumption.
- Recommend Thurrock continues to monitor the loss of employment space through regular reviews in the local plan. This would avoid the need to make arbitrary assumptions about the future loss of employment space and base it on robust data. If these periodic reviews showed there had been a loss of high quality, occupied floorspace and vacancy rates were low, we would recommend that the Council takes steps to replace this space by increasing the floorspace requirement accordingly. However, this option may lead to an under-provision of employment land in the short term. Also, any Local Plan review reflecting the monitoring findings would take many years to put in place.
- Recommend that when Thurrock reaches its conclusions on their employment land needs in their new Local Plan, they should assume no further losses of employment space unless there is clear evidence to conclude otherwise from the sources listed below. This would mean that the Local Plan is based on the best information on what is likely to happen in reality. In particular, it would be appropriate to take account of future likely losses from the following sources:
    - Committed losses since 2023/24 (the base date for the information on existing commitments in the report).
    - Sites currently protected for existing employment use which are proposed to lose this protection in the new Local Plan – the ELAA has made recommendations in relation to this.
    - Other sites currently in employment use, which are proposed for non-B class uses in the new local plan.

4.62 Our favoured approach is the last of these options as it is the only way of ensuring that replacement demand is addressed in a robust way, however, it is important to stress the need for close monitoring of the future loss of employment floorspace.

Safety Margin

4.63 Thurrock will also need to consider whether the land need estimated should be uplifted to include a 'safety margin'. It is fairly standard practice in employment land reviews to adjust upwards floorspace and land scenarios by adding a flexibility factor the purpose of which is to reflect:

- The need to provide choice to developers and occupiers – the safety margin theoretically allows for a wider choice of sites.
- The lack of availability of land at any given point in time, which may occur for several reasons and is sometimes referred to as frictional vacancy; and
- The provision of headroom in the supply to allow, for example, for stronger growth than is assumed in setting employment land requirements.

4.64 Any safety margin should take account of the 2024 NPPF which directs that *'Policies in Local plans and spatial development strategies should be reviewed to assess whether they need updating at least once every five years.... Reviews should be completed no later than five years'.*

4.65 The direction from NPPF implies a new plan should be adopted within five years of the previous plan being adopted. If Thurrock's new plan is adopted in 2028, the employment land supply identified would therefore need to last five years until policies were reviewed and adopted five years later in 2033. However, the supply is calculated to meet demand until 2044 thereby providing a safety margin of over ten years supply which can cater for friction, choice and uncertainty. In addition, a frictional vacancy rate of 7.5% is already allowed for in floorspace needs identified in the scenarios in this section.

4.66 However, it is important to consider that long-term supply such as this will not necessarily ensure market requirements are met at any given point time. Thurrock may therefore want to consider a rolling five-year supply of sites that are immediately available at the time of adoption and at all times thereafter. On this basis, no upward adjustment to the overall requirements is required, however, there is a policy response which is discussed in more detail in Section 5.

Summary of Scenarios

4.67 Table 4.17 below provides a summary of the outputs of all the scenarios that have been considered in this section in terms of employment growth and employment land requirements. This indicates potential growth of between 4,800 (OE baseline scenario) and 16,975 FTE jobs (OE higher growth scenario), resulting in a requirement for between 67.81 ha and 245.65 ha of employment land to accommodate office, industrial and warehousing activities. The requirements associated with the OE mid-growth scenario and labour supply scenario sit broadly within the middle of this range (173.12 ha and 94.67 ha respectively).

4.68 The past trends scenarios result in requirements ranging from 165.2 ha (based on the entire data period average) to 273.3 ha (based on the 5-year average), with the scenario based on the10-year average equating to 241.4 ha, which is broadly in line with the OE higher growth scenario.

Table 4.17: Comparison of Employment, Floorspace and Land use Requirements (2024-2044)

	Office (E(g)(i-ii)	Industrial E(g)(iii) & B2	Warehousing B8	Total
Total FTEs				
OE baseline	1,319	288	3,195	4,802
OE mid-growth	1,319	3,674	6,752	11,745
OE higher growth	1,319	6,929	8,728	16,975
Labour supply scenario	1,770	689	4,318	6,777
Past Trends Scenario	-	-	-	-
GEA Floorspace Requirements Allowing for Vacancy (sq. m)				
OE baseline	22,569	12,056	253,905	288,529
OE mid-growth	22,569	150,673	536,513	709,754
OE higher growth	22,569	283,827	693,490	999,886
Labour supply scenario	30,057	28,590	343,098	401,745
Past Trends Scenario	-	-	-	-
Total Employment Land Requirements (ha)				
OE baseline	1.32	3.01	63.48	67.81
OE mid-growth	1.32	37.67	134.13	173.12
OE higher growth	1.32	70.95	173.37	245.65
Labour supply scenario	1.75	7.15	85.77	94.67
	Former B1 Use Classes	**Industrial (B2)**	**Warehousing B8**	**Total**
Past Trends Scenario	8.5 - 12	18.4 - 25.3	130.3 - 242.7	165.2 – 273.3

Source: ekosgen part of GC Insight

Sensitivity Testing

4.69 This EDNA update considers two additional sensitivity tests including working from home rates and plot ratio assumptions. These are discussed in turn below.

Working from Home rates

4.70 The labour-demand and labour-supply scenarios tested in this Section include assumptions about the proportion of workers working from home (and therefore not contributing to demand for employment land and floorspace) based on ONS homeworking data by industry sector for 2020[20]. According to that data, the average proportion of people working from their home or mainly from their home across all sectors nationally was 20.6%. Once sectoral rates were applied to our employment land model for Thurrock, this equated to an average of 16% across all sectors in Thurrock, lower than the national average.

4.71 The 2020 ONS was the most detailed homeworking data available at the time of preparing the 2023 EDNA when homeworking and hybrid working patterns were still considered to be higher than pre-Covid times. Since then, a more recent study by ONS[21] has considered whether these patterns have changed. The 2024 data suggests that between January 2021 and October 2024, the monthly average of the proportion of people working only from home was 18%, with the latest October 2024 figure at 13%. This suggests the average figure of 16% included in our

[20] ONS, January to December 2020, Annual Population Survey, Homeworking by Industry Sector in the UK

[21] ONS, November 2024, Options and Lifestyle Survey

labour-demand and labour-supply scenarios is robust. In addition, the data indicates a further 28% of people work in a hybrid pattern as of October 2024, or an average of 19% since the start of 2021.

4.72 The data suggests that the proportion of people working only from home has decreased slightly since 2021 whilst the proportion of people working in a hybrid pattern has increased since 2021. Those in a hybrid pattern will still contribute to demand for employment floorspace, albeit it is likely to be less than if everyone was at their place of work five days a week. On this basis it is considered prudent to apply a 5-percentage point increase and decrease in home working rates across all sectors as a sensitivity test.

4.73 The outcome of this on land requirements is set out in Table 4.18 below and indicates that even with a 5% decrease in working from home rates across all sectors of the economy, the OE higher growth scenario still has a slightly lower future requirements for employment land than when compared to the upper range of the past trends scenario (273.3 ha).

Table 4.18: Working from Home Sensitivity Test (2024-2044)

	Office	Industrial	Warehousing	Total
Land Requirements – 5% increase in WfH rates				
OE baseline	1.24	2.68	59.87	63.79
OE higher growth	1.24	66.7	163.5	231.4
Labour supply scenario	1.63	6.54	80.91	89.08
Land Requirements – 5% decrease in WfH rates				
OE baseline	1.42	3.34	67.08	71.84
OE higher growth	1.42	75.23	183.23	259.88
Labour supply scenario	1.87	7.75	90.64	100.26

Source: ekosgen part of GC Insight

Plot ratios

4.74 The relationship between the quantity of floorspace and typical plot sizes can vary depending on the nature of development and the location. For industrial and warehousing space, the variation tends to be less significant and the plot ratio assumption of 0.4 has been tested with land holders and agents and considered reasonable. For office space, the plot ratio assumption used in the scenario modelling is 2 on the basis that office space in Thurrock and new office space coming forward is generally located in town centres at higher densities than business park style developments and with more than one storey. However, variation of office plot ratios can be more significant, and taking into consideration the potential for office space to come forward in locations outside of town centres such as at the Freeport or as part of mixed use sites on urban extensions, it is prudent to test a lower density plot ratio assumption – we have therefore applied a sensitivity test to the office space based on a plot ratio of 1.

4.75 The outcome on the land requirements is set out below (Table 4.19) with the largest requirement for land for offices under the labour-supply scenario. The impact on overall land requirements is minimal, however.

Table 4.19: Plot Ratio Sensitivity Test (2024-2044)

	Office	Industrial	Warehousing	Total
OE baseline	2.27	3.01	63.48	68.77
OE higher growth	2.27	70.95	173.37	246.60
Labour supply scenario	3.03	7.15	85.77	95.95

Source: ekosgen part of GC Insight

5 Demand and Supply Balance

Overall Assessment

5.1 We recommend planning for future employment land needs on the basis of the labour-demand higher growth scenario. This equates to a **future requirement for 245.65 ha to accommodate anticipated growth of just under 17,000 FTEs in office, industrial and warehousing sectors** over the period 2024 to 2044. This recommendation is based on:

- Consideration and comparison of all updated labour-demand and labour-supply scenarios for future employment growth;
- Comparisons with past-take-up trends and net absorption rates, both of which lend support to a higher growth scenario outcome, but the latter of which lends caution to assuming that all space developed (including historically) will be occupied and therefore supporting employment;
- Consideration of the implications of sensitivity testing; and
- Consideration of the NPPF requirement to plan positively for economic growth.

5.2 We consider the baseline and mid-growth OE labour demand scenarios and the labour supply scenario to be unduly cautious and that basing future requirements on these scenarios would likely fail to accommodate the growth associated with the planned activity and pipeline development associated with the Freeport, the LTC and planning positively for growth sectors.

5.3 In terms of supply, the ELAA identifies a gross total of 392.6 ha and a **net developable area of 312.4 ha across Thurrock**. These figures include the Coryton Oil Refinery expansion land, which the ELAA notes is typically excluded from assessments, however, they conclude the site could be used for alternative employment purposes if released from its present designation. The ELAA goes on to note that if the Council were minded to release the site from employment allocation altogether, then the estimated available land would reduce to 337.9 ha (gross) or 263.7 ha (net).

5.4 When comparing the net developable supply of 263.7 ha to 312.4 ha with the future requirements for 245.65 ha, there is in quantitative terms, sufficient supply to meet future anticipated requirements of 245.65 ha. However, as discussed in the 2023 EDNA, the designation of the Freeport sites and their varied status in planning terms, adds a layer of complexity to the demand and supply comparison which cannot necessarily be established through a simplistic quantitative comparison. The ELAA supports this view and notes that whilst a quantitative comparison may suggest that additional land is not required for allocation over the plan period, analysis shows the limited distribution of available employment sites, with the vast majority of current availability positioned around London Gateway and Thames Enterprise Park to the east. Furthermore, the ELAA identifies sites which are deemed readily available amounting to just 124.7 ha net developable area, the large majority of which (119.27 ha) is located in London Gateway or Thames Enterprise Park. The remaining 5ha that is readily available is spread across several small sites of less than 1ha each. Lastly, the supply may be further reduced if Thurrock is minded to deallocate the sites recommended for release in the ELAA which, excluding the Coryton Oil Refinery, amount to a further 8.94 ha in total.

5.5 These issues are discussed in further detail in turn below.

Office Demand and Supply Balance

5.6 The labour-demand higher growth scenario has identified a future requirement for around 22,570 sq. m of Use Class E(g)(i-ii) employment floorspace equating to 1.32 ha or increasing to around 2.27 ha if lower density plot ratios materialise as tested in the sensitivity testing. The quantitative supply of available employment land has not been broken down by land use type. The 2023 ELAA stated that none of the available sites were traditional office sites and the 2025 ELAA reconfirms this although notes that some of the available sites may be suitable for ancillary office uses. Overall, there have not been any substantial changes in the office market since the 2023 ELAA and EDNA were prepared, and the office market remains relatively small and localised with key points from the market assessment being:

- concentrations of existing office stock are located around Grays, Standford Le Hope and Purfleet-on-Thames with the former accommodating local businesses as well as the Council offices. The stock is dominated by older buildings with relatively little new build activity in the last five years.
- low levels of activity in both office sales and letting markets and limited new development in terms of construction starts and net deliveries.
- according to office lease activity, the largest share of take-up activity has been for 0-49 sq. m indicating demand has been from occupiers with small space requirements likely including SMEs, start-ups or independent businesses with relatively small workforces.
- an increase in availability (vacancy) in 2024 to 11.1% at its highest level and above the three year average (5.6%) and negative net absorption rates for the last two years with more space vacated than leased.
- vacant office space amounting to 3,604 sq. m, around a third of which is less than 49 sq. m and well placed to meet demand for small and local occupiers.

5.7 The ELAA goes on to note that whilst there may be some future demand for office space linked to activities at London Gateway and the Freeport, this is likely to be accommodated as ancillary space within industrial, logistics and warehousing developments and that demand for purpose-built office space and speculative new-build office space is considered unlikely to materialise. Demand for office space outside of the Freeport activities is therefore anticipated to continue to arise from small, local businesses in sectors such as professional services, business support services, public administration and to a lesser extent creative and media businesses. These sectors are dominated by micro businesses (0-9 employees) and this is expected to continue to be the case with the majority of demand from these sectors for small units of less than 100 sq. m. Current vacancy rates in Thurrock indicate good availability levels of office space in this size range and with the majority of space located in the main office market areas including Grays.

5.8 The currently available space may be capable of meeting future demand requirements in the short-term, particularly as current vacancy levels are slightly above the rate considered necessary to support market churn and choice (7.5%). However, consideration needs to be given to how remaining future requirements for office floorspace can be accommodated across the borough. We consider that the 2023 EDNA recommendations in this regard remain valid with consideration given to accommodating additional office floorspace within existing employment land allocations through intensification or co-locations, within the regeneration of town centres and within planned urban extensions as part of mixed-use developments.

Industrial and Warehousing Demand and Supply Balance

5.9 The labour-demand higher growth scenario indicates a future requirement for around 977,300 sq. m of light industrial, industrial and warehousing floorspace, equating to 244.32 ha of employment land to accommodate these requirements. As with the 2023 EDNA, the majority of this requirement (173.37 ha) is for warehousing land. The ELAA is not able to distinguish between industrial and warehousing land when considering the available supply, and increasingly planning applications are being submitted for flexible B2/B8 uses indicating sites are often considered interchangeable/suitable for both. To allow flexibility in how the Council plans for future industrial and warehousing needs in the district, we recommend viewing the B2 and B8 as a combined requirement.

5.10 When compared with the supply of available employment land, (263.7 ha to 312.4 ha) there is, in quantitative terms, a sufficient supply of land to meet future requirements. However, it is important to consider qualitative factors before drawing conclusions.

5.11 Firstly, the ELAA demonstrates that the overwhelming majority of available employment land is located in the eastern end of Thurrock and associated with London Thames Gateway and Thames Enterprise Park Freeport areas accounting for around 82% of available land and around 96% of readily available land.

5.12 In addition to available supply within these Freeport areas, given a large proportion of future requirements for employment land are expected to derive from Freeport activities, it is also relevant to consider the sites that are being promoted by the Port of Tilbury for port expansion including industrial and warehousing activities are designated Freeport sites. These are not included within the 263.7 to 312.4 ha of available employment land as they are not subject to an existing allocation or planning approval. However, they were reviewed within the ELAA for their potential for employment use and a number were rated as being good/very good. Should these sites be formerly allocated through the Local Plan process or the subject of successful planning applications, this will help to accommodate some of the anticipated future demand requirements outside of the existing available supply. The extent to which this occurs will need to be carefully monitored as to the impact it might have on the balance between demand and supply of available sites.

5.13 Whilst a significant element of future requirements for employment space is anticipated to derive from activities associated with the Freeport, it is unrealistic to expect the available land located in the eastern part of the borough to be sufficient to address all types of employment land needs. This is particularly the case when considering the existing volume of activity and stock located in the west of the borough and elsewhere, and the anticipated continuing demand at the smaller end of the market to meet local requirements for space.

5.14 According to the ELAA, there are smaller clusters of available sites at the western end of the borough, but these account for significantly less space (49.7 ha) compared to the east of the borough. Furthermore, a very limited number of sites outside of the eastern end of the borough were assessed as readily available for development, therefore limiting the flexibility and choice in Thurrock's portfolio of supply.

5.15 The extent to which currently vacant employment floorspace in the borough can meet demand requirements also needs to be considered. The commercial property market review within the

ELAA indicates an increase in available stock compared to the previous ELAA, with a vacancy rate of 8.9% in January 2025 with a total of 432,166 sq. m of available space. This is a reasonable vacancy rate to support churn and flexibility and does not indicate excessive vacancy rates. Over 50% of available space is situated in the eastern part of the borough, whilst 33% is located in West Thurrock and a further 10% around Purfleet. Within this, c155,000 sq. m is currently being advertised for lease but not due to be completed until 2026, this includes 120,774 at London Gateway. Whilst the supply of available floorspace is less constrained than previously reported, the ELAA still reports a mismatch in supply and demand to some extent with demand at the smaller end of the market expected to continue and a shortage of available small to medium sized units on the market.

5.16 Lastly, the future requirements under the labour-demand higher growth scenario do not take into account any requirements to replace existing employment areas that may be considered for de-allocation through the Local Plan process. The lower end of the available supply figures (264.4 ha) take into account potential for the Coryton Oil Refinery expansion land to be deallocated, but there was also an additional 8.94 ha of employment land identified in the ELAA for potential release. A number of these sites are reasonably well occupied and may therefore generate replacement demand for employment space elsewhere should they be deallocated. The Council will need to monitor this on a site-by-site basis.

5.17 On the basis of the above analysis, we uphold the recommendations set out in the 2023 EDNA which remain relevant and valid. We consider there is a case for the allocation of additional land to support modern industrial and warehousing space for general employment purposes at the mid to small end of the market.

Further Considerations

Deallocation and Protection of existing employment sites

5.18 The quantitative comparison of demand and supply indicates a small surplus of employment land, the scale of which will depend on whether the Council is minded to deallocate employment sites recommended in the ELAA. The ELAA has identified around 8.94 ha of employment land across 8 sites (excluding the Coryton Oil expansion land) which account for 1% of total existing employment space.

5.19 A number of these sites are still reasonably well occupied and accommodating a variety of business uses despite being considered dated and secondary stock. Therefore, whilst having a surplus indicates that there is potential to deallocate sites for employment land, this needs to be measured carefully against qualitative considerations such as the potential need to reaccommodate occupiers on these sites, the existing distribution of employment land availability, and the need to maintain a flexible supply. As considered in the 2023 EDNA, a criteria-based approach could be developed before deallocation is decided which incorporates the following:

- the extent to which the site is meeting a need for affordable or small-scale accommodation which is not currently accommodated elsewhere;
- the extent to which the site is meeting a need for bad-neighbour uses which cannot be accommodated elsewhere;

- consideration of potential for estate renewal to address identified deficiencies in quality of premises and sites; and
- the extent to which space may need to be re-provided to accommodate current occupiers.

5.20 Given the relatively small surplus of employment land, for sites which are not recommended for deallocation, the loss of existing employment sites and premises should on the whole be resisted and only released where it can be demonstrated that it is no longer required or fit for purpose. This can be achieved through a policy response which:

- requires sites to be marketed for employment purposes for a suitable period of time before they are permitted for other uses; and
- requires evidence of a viability assessment to demonstrate that a site cannot be redeveloped for employment purposes.

Maintaining a flexible supply of industrial and warehousing space

5.21 The EDNA has identified a future requirement for 245.65 ha of employment land over the plan period, and whilst there is, in quantitative terms, sufficient supply to meet this requirement, not all of the current supply will be in the right location or of the right type to meet future needs. Furthermore, NPPF emphasises that it is important for employment land policy to be sufficiently flexible to adapt to evolving economic conditions and business needs and enable rapid responses to changes in economic circumstances.

5.22 As noted, a large proportion of future requirements for employment land are expected to derive from activities associated with the Freeport, which is supported by a business case and backed by Government at the national level. The scale and range of sites that exist within the Freeport designations, including currently unallocated sites at the Port of Tilbury, are considered important for allowing Thurrock to adapt and respond to potential changes in economic circumstances and enable it to maintain a flexible supply of land should requirements arise beyond the identified level of demand in this EDNA.

5.23 However, outside of the Freeport areas, the ELAA has highlighted the limited provision of available employment sites in the west of the borough, the limited supply of readily available sites, limited vacancies on existing sites and, that supply is considered constrained. As with the 2023 EDNA, we therefore recommend that Thurrock considers making new allocations to maintain a flexible supply of employment land over the plan period and to address gaps in provision to meet the needs of small to medium general industrial and warehousing occupiers.

5.24 Past-take up trends indicate an average annual take-up of between 7,900 sq. m (B2 and B8 space) and 14,700 sq. m (B2, B8 and Mixed B1-B8) on sites in Thurrock, excluding those that are part of London Gateway and the Amazon Fulfilment centre. Projecting this forward over five years provides a useful indication of the scale of potential requirements for readily available supply to meet local and general industrial and warehousing requirements outside of the Freeport activities and would allow Thurrock to monitor and review the supply and demand position every five years (as recommended below). Based on applying standard plot ratios (0.4), this would equate to between 10 ha to 18 ha over five years. Taking into account the 5 ha of existing readily available supply outside of designated Freeport sites, this would indicate new allocations of between 5 ha and 12 ha may be required to help maintain a flexible supply of industrial and warehousing land.

5.25 When considering the potential for new allocations, key priorities would include:

- Sites with suitability for urban servicing, last-mile delivery, industrial/light industrial and small to medium scale warehousing activities from sectors that aren't necessarily directly linked to Port or regional, national or international scale activities, but to serve a more local market;
- Proximity to the strategic road network, proximity to urban areas and potential to support a range of units size and types (from as small as 100 sq. m) to incorporate choice and flexibility.
- In terms of light industrial requirements (Use Class E(g)(iii) the analysis has indicated only relatively small amounts of future demand for this type of space, however, some more general industrial activities (traditionally associated with B2 floorspace) may also be suitable for occupying more flexible space in terms of location and site requirements without the need for specific industrial (B2) sites – for example edge of centre sites, of sites within mixed-use developments that can facilitate co-location through careful screening, buffer zones and access arrangements.

5.26 The ELAA has reviewed potential employment sites and only a limited number fall into all three categories of being suitable, available and achievable. Thurrock will therefore need to carefully consider these alongside objectives to support a more even distribution of readily available employment land supply in the borough.

Consider role of town centres

5.27 As discussed in the 2023 EDNA, town centres in Thurrock have a key role to play in acting as a focal point for services and office-based activities including supporting the growth of some of Thurrock's key growth and opportunity sectors such as business support services and creative industries. Increasing the provision of office space in Thurrock's town centres can help to diversify the mix of uses and encourage and promote footfall in areas where the retail market is declining or less strong.

5.28 The ELAA reiterates that the Thurrock office market is relatively small and the EDNA has indicated a small future requirement of 22,570 sq. m over the plan period, which could in part be met within Thurrock's town centres through planned investment in Grays, Tilbury and Purfleet-on-Thames. The shift towards hybrid and flexible working patterns is not expected to change significantly further from current patterns and therefore the role of town centres in meeting demand for well-connected office space that is in close proximity to, or with good transport connections to residential areas, will continue to be a key attractor.

5.29 Grays is the most established town centre office market accounting for 29.5% of current office stock and has good connections to London and therefore should be considered as a key location to promote further opportunities for flexible office space including co-working and shared space which can be brought forward at ground and lower floors as part of residential-led redevelopment.

5.30 Tilbury town centre has a smaller office market than Grays (9.6% of current office stock) and serves a relatively local market. There may be opportunities to encourage and support additional office space to be brought forward as part of the Town Investment Plan, and this should be considered as part of plans to activate ground floor uses through flexible space provisions that can be used flexibly for office occupiers and other market sectors (retail).

5.31 Purfleet-on-Thames is not currently considered an office location, and the redevelopment plans for the town centre have stalled and are more uncertain at this stage. Notwithstanding this, and as recommended in the 2023 EDNA, any space brought forward for office uses in Purfleet-on-Thames should be flexibly designed to cater for a range of uses including office and studio activities as well as workshop and co-working spaces and retail uses. This will allow the space to adapt to market demand and changing requirements.

The role of urban extensions

5.32 As discussed in the 2023 EDNA, Urban Extensions may also play a role in supporting the future delivery of employment land. Should they be considered as the new Local Plan moves forward, the following will be important factors to take into account:

- small-scale flexible office, studio and workshop space should be considered on sites of larger scale which may also include supporting health, education and community spaces. This type of space can be co-located with residential uses and compliment the wider amenity offer of new settlements as well as help to meet local requirements, address the distribution of workspace in the borough and contribute to more sustainable travel patterns by providing supporting employment opportunities in close proximity to residential settlements.
- small to medium general warehousing and industrial units including Freehold space may also be important. Again, provision of this nature may help to address gaps in the current distribution of employment floorspace whilst meeting local demand requirements at the smaller end of the market. Being able to provide new space of this nature may also help to address demand requirements from those currently occupying premises on sites identified in the ELAA for potential release or that are considered in need of regeneration and investment.

5.33 The ELAA has considered a number of larger sites that are being promoted for residential-led or mixed-use development which comprise an element of employment land. Recommendations with regards to their suitability for employment uses outlined in the ELAA should be taken into consideration.

Facilitating development to meet the needs of a modern economy

5.34 The recently updated NPPF (2024) highlights the importance of planning policies which 'pay particular regard to facilitating development to meet the needs of a modern economy, including by identifying suitable locations for uses such as laboratories, gigafactories, data centres, digital infrastructure, freight and logistics' (paragraph 86). Some of these uses, such as gigafactories and data centres, are somewhat niche in their location and infrastructure requirements as well as their regulatory environment. Furthermore, their requirements for land are not determined by, or as strongly linked to, operational employment levels to the same extent as other sectors of the economy. Whilst we recognise their importance nationally and to Thurrock, requirements for land to facilitate their development are not therefore factored into this EDNA in the same way that land for laboratories and logistics (through the growth scenario modelling) or freight (through the Freeport site designations) are.

5.35 Requirements for land for both Gigafactories and Data Centres for example, can vary significantly from 1-2 hectares right up to 50 hectares for some larger AI facilities, and will need to be close to robust and accessible power availability and fibre optic networks. Demand for such sites tends to be linked to national and regionally significant and strategic requirements, and therefore any sites allocated or permitted for these uses are not likely to meet local needs for general industrial land and should be considered as additional sites.

5.36 Sites that come forward for these uses via planning applications should be considered on a case-by-case basis taking into account the emphasis in NPPF of facilitating such development and the contribution they make to the growth needs of a modern economy.

Monitoring and reviewing requirements

5.37 As noted earlier in this report, the NPPF (2024) supports positive plan making and encourages Local Plans to be sufficiently flexible to adapt to rapid change. Economic uncertainty at a global and national level are likely to continue at least for the first few years of the Plan period and it is therefore important to ensure that employment land policy is sufficiently flexible to adapt but also kept up to date in the future. We therefore recommend the following:

- Thurrock continues to monitor development completions for both office and industrial space (both positive and negative) and keeps a consistent record of data that can be analysed over time;
- Thurrock continues to maintain a record of development commitments including outstanding planning permissions and local allocations; and
- Thurrock gathers market evidence where feasible, including vacancy rates and inward investment inquiries.

5.38 To date, development across the Freeport sites has not come forward at the pace that was considered likely in the 2023 EDNA, largely due to ongoing economic and geo-political instability, rising costs and macro-economic factors. It will be particularly important to monitor the delivery and take-up of space at these sites given the impact that this scale of activity could have on demand and supply of employment land in the borough, and the impact on the scale of employment supported and relationship to housing requirements.

5.39 As with the 2023 EDNA, it is also recommended that Thurrock;

- Undertakes regular employment land review updates (every five years minimum) to ensure the evidence base remains up to date;
- Engages regularly with locally-based businesses to understand their ongoing needs and aspirations for growth and expansion; and
- Undertakes regular engagement with local commercial agents, developers and land owners to stay up to date with local market conditions.

5.40 The latter two of these recommendations could take place via working-group forums, surveys or specially established one-off group consultations.

A.1. Appendix 1 Land Use Categories

5-Digit Sic Code Sector	OE Sectors	Land Use
01000 : DEFRA/Scottish Executive Agricultural Data	A : Agriculture, forestry and fishing	Non B Class
01110 : Growing of cereals (except rice), leguminous crops and oil seeds	A : Agriculture, forestry and fishing	Non B Class
01120 : Growing of rice	A : Agriculture, forestry and fishing	Non B Class
01130 : Growing of vegetables and melons, roots and tubers	A : Agriculture, forestry and fishing	Non B Class
01140 : Growing of sugar cane	A : Agriculture, forestry and fishing	Non B Class
01150 : Growing of tobacco	A : Agriculture, forestry and fishing	Non B Class
01160 : Growing of fibre crops	A : Agriculture, forestry and fishing	Non B Class
01190 : Growing of other non-perennial crops	A : Agriculture, forestry and fishing	Non B Class
01210 : Growing of grapes	A : Agriculture, forestry and fishing	Non B Class
01220 : Growing of tropical and subtropical fruits	A : Agriculture, forestry and fishing	Non B Class
01230 : Growing of citrus fruits	A : Agriculture, forestry and fishing	Non B Class
01240 : Growing of pome fruits and stone fruits	A : Agriculture, forestry and fishing	Non B Class
01250 : Growing of other tree and bush fruits and nuts	A : Agriculture, forestry and fishing	Non B Class
01260 : Growing of oleaginous fruits	A : Agriculture, forestry and fishing	Non B Class
01270 : Growing of beverage crops	A : Agriculture, forestry and fishing	Non B Class
01280 : Growing of spices, aromatic, drug and pharmaceutical crops	A : Agriculture, forestry and fishing	Non B Class
01290 : Growing of other perennial crops	A : Agriculture, forestry and fishing	Non B Class
01300 : Plant propagation	A : Agriculture, forestry and fishing	Non B Class
01410 : Raising of dairy cattle	A : Agriculture, forestry and fishing	Non B Class
01420 : Raising of other cattle and buffaloes	A : Agriculture, forestry and fishing	Non B Class
01430 : Raising of horses and other equines	A : Agriculture, forestry and fishing	Non B Class

5-Digit Sic Code Sector	OE Sectors	Land Use
01440 : Raising of camels and camelids	A : Agriculture, forestry and fishing	Non B Class
01450 : Raising of sheep and goats	A : Agriculture, forestry and fishing	Non B Class
01460 : Raising of swinepigs	A : Agriculture, forestry and fishing	Non B Class
01470 : Raising of poultry	A : Agriculture, forestry and fishing	Non B Class
01490 : Raising of other animals	A : Agriculture, forestry and fishing	Non B Class
01500 : Mixed farming	A : Agriculture, forestry and fishing	Non B Class
01610 : Support activities for crop production	A : Agriculture, forestry and fishing	Non B Class
01621 : Farm animal boarding and care	A : Agriculture, forestry and fishing	Non B Class
01629 : Support activities for animal production (other than farm animal boarding and care) nec	A : Agriculture, forestry and fishing	Non B Class
01630 : Post-harvest crop activities	A : Agriculture, forestry and fishing	Non B Class
01640 : Seed processing for propagation	A : Agriculture, forestry and fishing	Non B Class
01700 : Hunting, trapping and related service activities	A : Agriculture, forestry and fishing	Non B Class
02100 : Silviculture and other forestry activities	A : Agriculture, forestry and fishing	Non B Class
02200 : Logging	A : Agriculture, forestry and fishing	Non B Class
02300 : Gathering of wild growing non-wood products	A : Agriculture, forestry and fishing	Non B Class
02400 : Support services to forestry	A : Agriculture, forestry and fishing	Non B Class
03110 : Marine fishing	A : Agriculture, forestry and fishing	Non B Class
03120 : Freshwater fishing	A : Agriculture, forestry and fishing	Non B Class
03210 : Marine aquaculture	A : Agriculture, forestry and fishing	Non B Class
03220 : Freshwater aquaculture	A : Agriculture, forestry and fishing	Non B Class
05101 : Mining of hard coal from deep coal mines (underground mining)	B : Mining and quarrying	Non B Class
05102 : Mining of hard coal from open cast coal working (surface mining)	B : Mining and quarrying	Non B Class

5-Digit Sic Code Sector	OE Sectors	Land Use
05200 : Mining of lignite	B : Mining and quarrying	Non B Class
06100 : Extraction of crude petroleum	B : Mining and quarrying	Non B Class
06200 : Extraction of natural gas	B : Mining and quarrying	Non B Class
07100 : Mining of iron ores	B : Mining and quarrying	Non B Class
07210 : Mining of uranium and thorium ores	B : Mining and quarrying	Non B Class
07290 : Mining of other non-ferrous metal ores	B : Mining and quarrying	Non B Class
08110 : Quarrying of ornamental and building stone, limestone, gypsum, chalk and slate	B : Mining and quarrying	Non B Class
08120 : Operation of gravel and sand pits; mining of clays and kaolin	B : Mining and quarrying	Non B Class
08910 : Mining of chemical and fertiliser minerals	B : Mining and quarrying	Non B Class
08920 : Extraction of peat	B : Mining and quarrying	Non B Class
08930 : Extraction of salt	B : Mining and quarrying	Non B Class
08990 : Other mining and quarrying nec	B : Mining and quarrying	Non B Class
09100 : Support activities for petroleum and natural gas extraction	B : Mining and quarrying	Non B Class
09900 : Support activities for other mining and quarrying	B : Mining and quarrying	Non B Class
10110 : Processing and preserving of meat	C : Manufacturing	Industrial
10120 : Processing and preserving of poultry meat	C : Manufacturing	Industrial
10130 : Production of meat and poultry meat products	C : Manufacturing	Industrial
10200 : Processing and preserving of fish, crustaceans and molluscs	C : Manufacturing	Industrial
10310 : Processing and preserving of potatoes	C : Manufacturing	Industrial
10320 : Manufacture of fruit and vegetable juice	C : Manufacturing	Industrial

5-Digit Sic Code Sector	OE Sectors	Land Use
10390 : Other processing and preserving of fruit and vegetables	C : Manufacturing	Industrial
10410 : Manufacture of oils and fats	C : Manufacturing	Industrial
10420 : Manufacture of margarine and similar edible fats	C : Manufacturing	Industrial
10511 : Liquid milk and cream production	C : Manufacturing	Industrial
10512 : Butter and cheese production	C : Manufacturing	Industrial
10519 : Manufacture of milk products (other than liquid milk and cream, butter, cheese) nec	C : Manufacturing	Industrial
10520 : Manufacture of ice cream	C : Manufacturing	Industrial
10611 : Grain milling	C : Manufacturing	Industrial
10612 : Manufacture of breakfast cereals and cereals-based foods	C : Manufacturing	Industrial
10620 : Manufacture of starches and starch products	C : Manufacturing	Industrial
10710 : Manufacture of bread; manufacture of fresh pastry goods and cakes	C : Manufacturing	Industrial
10720 : Manufacture of rusks and biscuits; manufacture of preserved pastry goods and cakes	C : Manufacturing	Industrial
10730 : Manufacture of macaroni, noodles, couscous and similar farinaceous products	C : Manufacturing	Industrial
10810 : Manufacture of sugar	C : Manufacturing	Industrial
10821 : Manufacture of cocoa, and chocolate confectionery	C : Manufacturing	Industrial
10822 : Manufacture of sugar confectionery	C : Manufacturing	Industrial
10831 : Tea processing	C : Manufacturing	Industrial
10832 : Production of coffee and coffee substitutes	C : Manufacturing	Industrial
10840 : Manufacture of condiments and seasonings	C : Manufacturing	Industrial

5-Digit Sic Code Sector	OE Sectors	Land Use
10850 : Manufacture of prepared meals and dishes	C : Manufacturing	Industrial
10860 : Manufacture of homogenised food preparations and dietetic food	C : Manufacturing	Industrial
10890 : Manufacture of other food products nec	C : Manufacturing	Industrial
10910 : Manufacture of prepared feeds for farm animals	C : Manufacturing	Industrial
10920 : Manufacture of prepared pet foods	C : Manufacturing	Industrial
11010 : Distilling, rectifying and blending of spirits	C : Manufacturing	Industrial
11020 : Manufacture of wine from grape	C : Manufacturing	Industrial
11030 : Manufacture of cider and other fruit wines	C : Manufacturing	Industrial
11040 : Manufacture of other non-distilled fermented beverages	C : Manufacturing	Industrial
11050 : Manufacture of beer	C : Manufacturing	Industrial
11060 : Manufacture of malt	C : Manufacturing	Industrial
11070 : Manufacture of soft drinks; production of mineral waters and other bottled waters	C : Manufacturing	Industrial
12000 : Manufacture of tobacco products	C : Manufacturing	Industrial
13100 : Preparation and spinning of textile fibres	C : Manufacturing	Industrial
13200 : Weaving of textiles	C : Manufacturing	Industrial
13300 : Finishing of textiles	C : Manufacturing	Industrial
13910 : Manufacture of knitted and crocheted fabrics	C : Manufacturing	Industrial
13921 : Manufacture of soft furnishings	C : Manufacturing	Industrial
13922 : Manufacture of canvas goods, sacks etc	C : Manufacturing	Industrial

5-Digit Sic Code Sector	OE Sectors	Land Use
13923 : Manufacture of household textiles (other than soft furnishings of 13921)	C : Manufacturing	Industrial
13931 : Manufacture of woven or tufted carpets and rugs	C : Manufacturing	Industrial
13939 : Manufacture of carpets and rugs (other than woven or tufted) nec	C : Manufacturing	Industrial
13940 : Manufacture of cordage, rope, twine and netting	C : Manufacturing	Industrial
13950 : Manufacture of non-wovens and articles made from non-wovens, except apparel	C : Manufacturing	Industrial
13960 : Manufacture of other technical and industrial textiles	C : Manufacturing	Industrial
13990 : Manufacture of other textiles nec	C : Manufacturing	Industrial
14110 : Manufacture of leather clothes	C : Manufacturing	Industrial
14120 : Manufacture of workwear	C : Manufacturing	Industrial
14131 : Manufacture of men's outerwear, other than leather clothes and workwear	C : Manufacturing	Industrial
14132 : Manufacture of women's outerwear, other than leather clothes and workwear	C : Manufacturing	Industrial
14141 : Manufacture of men's underwear	C : Manufacturing	Industrial
14142 : Manufacture of women's underwear	C : Manufacturing	Industrial
14190 : Manufacture of other wearing apparel and accessories	C : Manufacturing	Industrial
14200 : Manufacture of articles of fur	C : Manufacturing	Industrial
14310 : Manufacture of knitted and crocheted hosiery	C : Manufacturing	Industrial
14390 : Manufacture of other knitted and crocheted apparel	C : Manufacturing	Industrial
15110 : Tanning and dressing of leather; dressing and dyeing of fur	C : Manufacturing	Industrial

5-Digit Sic Code Sector	OE Sectors	Land Use
15120 : Manufacture of luggage, handbags and the like, saddlery and harness	C : Manufacturing	Industrial
15200 : Manufacture of footwear	C : Manufacturing	Industrial
16100 : Sawmilling and planing of wood	C : Manufacturing	Industrial
16210 : Manufacture of veneer sheets and wood-based panels	C : Manufacturing	Industrial
16220 : Manufacture of assembled parquet floors	C : Manufacturing	Industrial
16230 : Manufacture of other builders' carpentry and joinery	C : Manufacturing	Industrial
16240 : Manufacture of wooden containers	C : Manufacturing	Industrial
16290 : Manufacture of other products of wood; manufacture of articles of cork, straw and plaiting materials	C : Manufacturing	Industrial
17110 : Manufacture of pulp	C : Manufacturing	Industrial
17120 : Manufacture of paper and paperboard	C : Manufacturing	Industrial
17211 : Manufacture of corrugated paper and paperboard; manufacture of sacks and bags of paper	C : Manufacturing	Industrial
17219 : Manufacture of paper and paperboard containers other than sacks and bags	C : Manufacturing	Industrial
17220 : Manufacture of household and sanitary goods and of toilet requisites	C : Manufacturing	Industrial
17230 : Manufacture of paper stationery	C : Manufacturing	Industrial
17240 : Manufacture of wallpaper	C : Manufacturing	Industrial
17290 : Manufacture of other articles of paper and paperboard	C : Manufacturing	Industrial
18110 : Printing of newspapers	C : Manufacturing	Industrial
18121 : Manufacture of printed labels	C : Manufacturing	Industrial/Light Industrial

5-Digit Sic Code Sector	OE Sectors	Land Use
18129 : Printing (other than printing of newspapers and printing on labels and tags) nec	C : Manufacturing	Industrial
18130 : Pre-press and pre-media services	C : Manufacturing	Industrial/Light Industrial
18140 : Binding and related services	C : Manufacturing	Industrial/Light Industrial
18201 : Reproduction of sound recording	C : Manufacturing	Industrial/Light Industrial
18202 : Reproduction of video recording	C : Manufacturing	Industrial/Light Industrial
18203 : Reproduction of computer media	C : Manufacturing	Industrial/Light Industrial
19100 : Manufacture of coke oven products	C : Manufacturing	Industrial
19201 : Mineral oil refining	C : Manufacturing	Industrial
19209 : Other treatment of petroleum products (excluding mineral oil refiningpetrochemicals manufacture)	C : Manufacturing	Industrial
20110 : Manufacture of industrial gases	C : Manufacturing	Industrial
20120 : Manufacture of dyes and pigments	C : Manufacturing	Industrial
20130 : Manufacture of other inorganic basic chemicals	C : Manufacturing	Industrial
20140 : Manufacture of other organic basic chemicals	C : Manufacturing	Industrial
20150 : Manufacture of fertilisers and nitrogen compounds	C : Manufacturing	Industrial
20160 : Manufacture of plastics in primary forms	C : Manufacturing	Industrial
20170 : Manufacture of synthetic rubber in primary forms	C : Manufacturing	Industrial
20200 : Manufacture of pesticides and other agrochemical products	C : Manufacturing	Industrial
20301 : Manufacture of paints, varnishes and similar coatings, mastics and sealants	C : Manufacturing	Industrial

5-Digit Sic Code Sector	OE Sectors	Land Use
20302 : Manufacture of printing ink	C : Manufacturing	Industrial
20411 : Manufacture of soap and detergents	C : Manufacturing	Industrial
20412 : Manufacture of cleaning and polishing preparations	C : Manufacturing	Industrial
20420 : Manufacture of perfumes and toilet preparations	C : Manufacturing	Industrial
20510 : Manufacture of explosives	C : Manufacturing	Industrial
20520 : Manufacture of glues	C : Manufacturing	Industrial
20530 : Manufacture of essential oils	C : Manufacturing	Industrial
20590 : Manufacture of other chemical products nec	C : Manufacturing	Industrial
20600 : Manufacture of man-made fibres	C : Manufacturing	Industrial
21100 : Manufacture of basic pharmaceutical products	C : Manufacturing	Industrial
21200 : Manufacture of pharmaceutical preparations	C : Manufacturing	Industrial
22110 : Manufacture of rubber tyres and tubes; retreading and rebuilding of rubber tyres	C : Manufacturing	Industrial
22190 : Manufacture of other rubber products	C : Manufacturing	Industrial
22210 : Manufacture of plastic plates, sheets, tubes and profiles	C : Manufacturing	Industrial
22220 : Manufacture of plastic packing goods	C : Manufacturing	Industrial
22230 : Manufacture of builders ware of plastic	C : Manufacturing	Industrial
22290 : Manufacture of other plastic products	C : Manufacturing	Industrial
23110 : Manufacture of flat glass	C : Manufacturing	Industrial
23120 : Shaping and processing of flat glass	C : Manufacturing	Industrial

5-Digit Sic Code Sector	OE Sectors	Land Use
23130 : Manufacture of hollow glass	C : Manufacturing	Industrial
23140 : Manufacture of glass fibres	C : Manufacturing	Industrial
23190 : Manufacture and processing of other glass, including technical glassware	C : Manufacturing	Industrial
23200 : Manufacture of refractory products	C : Manufacturing	Industrial
23310 : Manufacture of ceramic tiles and flags	C : Manufacturing	Industrial
23320 : Manufacture of bricks, tiles and construction products, in baked clay	C : Manufacturing	Industrial
23410 : Manufacture of ceramic household and ornamental articles	C : Manufacturing	Industrial
23420 : Manufacture of ceramic sanitary fixtures	C : Manufacturing	Industrial
23430 : Manufacture of ceramic insulators and insulating fittings	C : Manufacturing	Industrial
23440 : Manufacture of other technical ceramic products	C : Manufacturing	Industrial
23490 : Manufacture of other ceramic products	C : Manufacturing	Industrial
23510 : Manufacture of cement	C : Manufacturing	Industrial
23520 : Manufacture of lime and plaster	C : Manufacturing	Industrial
23610 : Manufacture of concrete products for construction purposes	C : Manufacturing	Industrial
23620 : Manufacture of plaster products for construction purposes	C : Manufacturing	Industrial
23630 : Manufacture of ready-mixed concrete	C : Manufacturing	Industrial
23640 : Manufacture of mortars	C : Manufacturing	Industrial
23650 : Manufacture of fibre cement	C : Manufacturing	Industrial
23690 : Manufacture of other articles of concrete, plaster and cement	C : Manufacturing	Industrial

5-Digit Sic Code Sector	OE Sectors	Land Use
23700 : Cutting, shaping and finishing of stone	C : Manufacturing	Industrial
23910 : Production of abrasive products	C : Manufacturing	Industrial
23990 : Manufacture of other non-metallic mineral products nec	C : Manufacturing	Industrial
24100 : Manufacture of basic iron and steel and of ferro-alloys	C : Manufacturing	Industrial
24200 : Manufacture of tubes, pipes, hollow profiles and related fittings, of steel	C : Manufacturing	Industrial
24310 : Cold drawing of bars	C : Manufacturing	Industrial
24320 : Cold rolling of narrow strip	C : Manufacturing	Industrial
24330 : Cold forming or folding	C : Manufacturing	Industrial
24340 : Cold drawing of wire	C : Manufacturing	Industrial
24410 : Precious metals production	C : Manufacturing	Industrial
24420 : Aluminium production	C : Manufacturing	Industrial
24430 : Lead, zinc and tin production	C : Manufacturing	Industrial
24440 : Copper production	C : Manufacturing	Industrial
24450 : Other non-ferrous metal production	C : Manufacturing	Industrial
24460 : Processing of nuclear fuel	C : Manufacturing	Industrial
24510 : Casting of iron	C : Manufacturing	Industrial
24520 : Casting of steel	C : Manufacturing	Industrial
24530 : Casting of light metals	C : Manufacturing	Industrial
24540 : Casting of other non-ferrous metals	C : Manufacturing	Industrial
25110 : Manufacture of metal structures and parts of structures	C : Manufacturing	Industrial
25120 : Manufacture of doors and windows of metal	C : Manufacturing	Industrial
25210 : Manufacture of central heating radiators and boilers	C : Manufacturing	Industrial

5-Digit Sic Code Sector	OE Sectors	Land Use
25290 : Manufacture of other tanks, reservoirs and containers of metal	C : Manufacturing	Industrial
25300 : Manufacture of steam generators, except central heating hot water boilers	C : Manufacturing	Industrial
25400 : Manufacture of weapons and ammunition	C : Manufacturing	Industrial
25500 : Forging, pressing, stamping and roll-forming of metal; powder metallurgy	C : Manufacturing	Industrial
25610 : Treatment and coating of metals	C : Manufacturing	Industrial
25620 : Machining	C : Manufacturing	Industrial
25710 : Manufacture of cutlery	C : Manufacturing	Industrial
25720 : Manufacture of locks and hinges	C : Manufacturing	Industrial
25730 : Manufacture of tools	C : Manufacturing	Industrial
25910 : Manufacture of steel drums and similar containers	C : Manufacturing	Industrial
25920 : Manufacture of light metal packaging	C : Manufacturing	Industrial
25930 : Manufacture of wire products, chain and springs	C : Manufacturing	Industrial
25940 : Manufacture of fasteners and screw machine products	C : Manufacturing	Industrial
25990 : Manufacture of other fabricated metal products nec	C : Manufacturing	Industrial
26110 : Manufacture of electronic components	C : Manufacturing	Industrial
26120 : Manufacture of loaded electronic boards	C : Manufacturing	Industrial
26200 : Manufacture of computers and peripheral equipment	C : Manufacturing	Industrial
26301 : Manufacture of telegraph and telephone apparatus and equipment	C : Manufacturing	Industrial

5-Digit Sic Code Sector	OE Sectors	Land Use
26309 : Manufacture of communication equipment (other than telegraph and telephone apparatus and equipment)	C : Manufacturing	Industrial
26400 : Manufacture of consumer electronics	C : Manufacturing	Industrial
26511 : Manufacture of electronic instruments and appliances for measuring, testing, and navigation, except industrial process control equipment	C : Manufacturing	Industrial
26512 : Manufacture of electronic industrial process control equipment	C : Manufacturing	Industrial
26513 : Manufacture of non-electronic instruments and appliances for measuring, testing and navigation, except industrial process control equipment	C : Manufacturing	Industrial
26514 : Manufacture of non-electronic industrial process control equipment	C : Manufacturing	Industrial
26520 : Manufacture of watches and clocks	C : Manufacturing	Industrial
26600 : Manufacture of irradiation, electromedical and electrotherapeutic equipment	C : Manufacturing	Industrial
26701 : Manufacture of optical precision instruments	C : Manufacturing	Industrial
26702 : Manufacture of photographic and cinematographic equipment	C : Manufacturing	Industrial
26800 : Manufacture of magnetic and optical media	C : Manufacturing	Industrial
27110 : Manufacture of electric motors, generators and transformers	C : Manufacturing	Industrial
27120 : Manufacture of electricity distribution and control apparatus	C : Manufacturing	Industrial
27200 : Manufacture of batteries and accumulators	C : Manufacturing	Industrial
27310 : Manufacture of fibre optic cables	C : Manufacturing	Industrial
27320 : Manufacture of other electronic and electric wires and cables	C : Manufacturing	Industrial

5-Digit Sic Code Sector	OE Sectors	Land Use
27330 : Manufacture of wiring devices	C : Manufacturing	Industrial
27400 : Manufacture of electric lighting equipment	C : Manufacturing	Industrial
27510 : Manufacture of electric domestic appliances	C : Manufacturing	Industrial
27520 : Manufacture of non-electric domestic appliances	C : Manufacturing	Industrial
27900 : Manufacture of other electrical equipment	C : Manufacturing	Industrial
28110 : Manufacture of engines and turbines, except aircraft, vehicle and cycle engines	C : Manufacturing	Industrial
28120 : Manufacture of fluid power equipment	C : Manufacturing	Industrial
28131 : Manufacture of pumps	C : Manufacturing	Industrial
28132 : Manufacture of compressors	C : Manufacturing	Industrial
28140 : Manufacture of other taps and valves	C : Manufacturing	Industrial
28150 : Manufacture of bearings, gears, gearing and driving elements	C : Manufacturing	Industrial
28210 : Manufacture of ovens, furnaces and furnace burners	C : Manufacturing	Industrial
28220 : Manufacture of lifting and handling equipment	C : Manufacturing	Industrial
28230 : Manufacture of office machinery and equipment (except computers and peripheral equipment)	C : Manufacturing	Industrial
28240 : Manufacture of power-driven hand tools	C : Manufacturing	Industrial
28250 : Manufacture of non-domestic cooling and ventilation equipment	C : Manufacturing	Industrial
28290 : Manufacture of other general-purpose machinery nec	C : Manufacturing	Industrial

5-Digit Sic Code Sector	OE Sectors	Land Use
28301 : Manufacture of agricultural tractors	C : Manufacturing	Industrial
28302 : Manufacture of agricultural and forestry machinery (other than agricultural tractors)	C : Manufacturing	Industrial
28410 : Manufacture of metal forming machinery	C : Manufacturing	Industrial
28490 : Manufacture of other machine tools	C : Manufacturing	Industrial
28910 : Manufacture of machinery for metallurgy	C : Manufacturing	Industrial
28921 : Manufacture of machinery for mining	C : Manufacturing	Industrial
28922 : Manufacture of earthmoving equipment	C : Manufacturing	Industrial
28923 : Manufacture of equipment for concrete crushing and screening roadworks	C : Manufacturing	Industrial
28930 : Manufacture of machinery for food, beverage and tobacco processing	C : Manufacturing	Industrial
28940 : Manufacture of machinery for textile, apparel and leather production	C : Manufacturing	Industrial
28950 : Manufacture of machinery for paper and paperboard production	C : Manufacturing	Industrial
28960 : Manufacture of plastics and rubber machinery	C : Manufacturing	Industrial
28990 : Manufacture of other special-purpose machinery nec	C : Manufacturing	Industrial
29100 : Manufacture of motor vehicles	C : Manufacturing	Industrial
29201 : Manufacture of bodies (coachwork) for motor vehicles (except caravans)	C : Manufacturing	Industrial
29202 : Manufacture of trailers and semi-trailers	C : Manufacturing	Industrial
29203 : Manufacture of caravans	C : Manufacturing	Industrial

5-Digit Sic Code Sector	OE Sectors	Land Use
29310 : Manufacture of electrical and electronic equipment for motor vehicles	C : Manufacturing	Industrial
29320 : Manufacture of other parts and accessories for motor vehicles	C : Manufacturing	Industrial
30110 : Building of ships and floating structures	C : Manufacturing	Industrial
30120 : Building of pleasure and sporting boats	C : Manufacturing	Industrial
30200 : Manufacture of railway locomotives and rolling stock	C : Manufacturing	Industrial
30300 : Manufacture of air and spacecraft and related machinery	C : Manufacturing	Industrial
30400 : Manufacture of military fighting vehicles	C : Manufacturing	Industrial
30910 : Manufacture of motorcycles	C : Manufacturing	Industrial
30920 : Manufacture of bicycles and invalid carriages	C : Manufacturing	Industrial
30990 : Manufacture of other transport equipment nec	C : Manufacturing	Industrial
31010 : Manufacture of office and shop furniture	C : Manufacturing	Industrial
31020 : Manufacture of kitchen furniture	C : Manufacturing	Industrial
31030 : Manufacture of mattresses	C : Manufacturing	Industrial
31090 : Manufacture of other furniture	C : Manufacturing	Industrial
32110 : Striking of coins	C : Manufacturing	Industrial
32120 : Manufacture of jewellery and related articles	C : Manufacturing	Industrial
32130 : Manufacture of imitation jewellery and related articles	C : Manufacturing	Industrial
32200 : Manufacture of musical instruments	C : Manufacturing	Industrial
32300 : Manufacture of sports goods	C : Manufacturing	Industrial

5-Digit Sic Code Sector	OE Sectors	Land Use
32401 : Manufacture of professional and arcade games and toys	C : Manufacturing	Industrial
32409 : Manufacture of games and toys (other than professional and arcade games and toys) nec	C : Manufacturing	Industrial
32500 : Manufacture of medical and dental instruments and supplies	C : Manufacturing	Industrial
32910 : Manufacture of brooms and brushes	C : Manufacturing	Industrial
32990 : Other manufacturing nec	C : Manufacturing	Industrial
33110 : Repair of fabricated metal products	C : Manufacturing	Industrial
33120 : Repair of machinery	C : Manufacturing	Industrial
33130 : Repair of electronic and optical equipment	C : Manufacturing	Industrial
33140 : Repair of electrical equipment	C : Manufacturing	Industrial
33150 : Repair and maintenance of ships and boats	C : Manufacturing	Industrial
33160 : Repair and maintenance of aircraft and spacecraft	C : Manufacturing	Industrial
33170 : Repair and maintenance of other transport equipment	C : Manufacturing	Industrial
33190 : Repair of other equipment	C : Manufacturing	Industrial
33200 : Installation of industrial machinery and equipment	C : Manufacturing	Industrial
35110 : Production of electricity	D : Electricity, gas, steam and air conditioning supply	Non B Class
35120 : Transmission of electricity	D : Electricity, gas, steam and air conditioning supply	Non B Class
35130 : Distribution of electricity	D : Electricity, gas, steam and air conditioning supply	Non B Class
35140 : Trade of electricity	D : Electricity, gas, steam and air conditioning supply	Non B Class

5-Digit Sic Code Sector	OE Sectors	Land Use
35210 : Manufacture of gas	D : Electricity, gas, steam and air conditioning supply	Non B Class
35220 : Distribution of gaseous fuels through mains	D : Electricity, gas, steam and air conditioning supply	Non B Class
35230 : Trade of gas through mains	D : Electricity, gas, steam and air conditioning supply	Non B Class
35300 : Steam and air conditioning supply	D : Electricity, gas, steam and air conditioning supply	Non B Class
36000 : Water collection, treatment and supply	E : Water supply; sewerage, waste management and remediation activities	Non B Class
37000 : Sewerage	E : Water supply; sewerage, waste management and remediation activities	Industrial
38110 : Collection of non-hazardous waste	E : Water supply; sewerage, waste management and remediation activities	Industrial
38120 : Collection of hazardous waste	E : Water supply; sewerage, waste management and remediation activities	Industrial
38210 : Treatment and disposal of non-hazardous waste	E : Water supply; sewerage, waste management and remediation activities	Industrial
38220 : Treatment and disposal of hazardous waste	E : Water supply; sewerage, waste management and remediation activities	Industrial
38310 : Dismantling of wrecks	E : Water supply; sewerage, waste management and remediation activities	Industrial

5-Digit Sic Code Sector	OE Sectors	Land Use
38320 : Recovery of sorted materials	E : Water supply; sewerage, waste management and remediation activities	Industrial
39000 : Remediation activities and other waste management services	E : Water supply; sewerage, waste management and remediation activities	Non B Class
41100 : Development of building projects	F : Construction	Non B Class
41201 : Construction of commercial buildings	F : Construction	Non B Class
41202 : Construction of domestic buildings	F : Construction	Non B Class
42110 : Construction of roads and motorways	F : Construction	Non B Class
42120 : Construction of railways and underground railways	F : Construction	Non B Class
42130 : Construction of bridges and tunnels	F : Construction	Non B Class
42210 : Construction of utility projects for fluids	F : Construction	Non B Class
42220 : Construction of utility projects for electricity and telecommunications	F : Construction	Non B Class
42910 : Construction of water projects	F : Construction	Non B Class
42990 : Construction of other civil engineering projects nec	F : Construction	Non B Class
43110 : Demolition	F : Construction	Non B Class
43120 : Site preparation	F : Construction	Non B Class
43130 : Test drilling and boring	F : Construction	Non B Class
43210 : Electrical installation	F : Construction	Industrial
43220 : Plumbing, heat and air-conditioning installation	F : Construction	Industrial
43290 : Other construction installation	F : Construction	Industrial
43310 : Plastering	F : Construction	Industrial

5-Digit Sic Code Sector	OE Sectors	Land Use
43320 : Joinery installation	F : Construction	Industrial
43330 : Floor and wall covering	F : Construction	Industrial
43341 : Painting	F : Construction	Industrial
43342 : Glazing	F : Construction	Industrial
43390 : Other building completion and finishing	F : Construction	Industrial
43910 : Roofing activities	F : Construction	Industrial
43991 : Scaffold erection	F : Construction	Industrial
43999 : Specialised construction activities (other than scaffold erection) nec	F : Construction	Industrial
45111 : Sale of new cars and light motor vehicles	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Non B Class
45112 : Sale of used cars and light motor vehicles	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Non B Class
45190 : Sale of other motor vehicles	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Non B Class
45200 : Maintenance and repair of motor vehicles	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Industrial
45310 : Wholesale trade of motor vehicle parts and accessories	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Non B Class
45320 : Retail trade of motor vehicle parts and accessories	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Non B Class
45400 : Sale, maintenance and repair of motorcycles and related parts and accessories	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Industrial
46110 : Agents involved in the sale of agricultural raw materials, live animals, textile raw materials and semi-finished goods	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Warehousing
46120 : Agents involved in the sale of fuels, ores, metals and industrial chemicals	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Warehousing

5-Digit Sic Code Sector	OE Sectors	Land Use
46130 : Agents involved in the sale of timber and building materials	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Warehousing
46140 : Agents involved in the sale of machinery, industrial equipment, ships and aircraft	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Warehousing
46150 : Agents involved in the sale of furniture, household goods, hardware and ironmongery	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Warehousing
46160 : Agents involved in the sale of textiles, clothing, fur, footwear and leather goods	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Warehousing
46170 : Agents involved in the sale of food, beverages and tobacco	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Warehousing
46180 : Agents specialised in the sale of other particular products	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Warehousing
46190 : Agents involved in the sale of a variety of goods	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Warehousing
46210 : Wholesale of grain, unmanufactured tobacco, seeds and animal feeds	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Warehousing
46220 : Wholesale of flowers and plants	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Warehousing
46230 : Wholesale of live animals	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Warehousing
46240 : Wholesale of hides, skins and leather	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Warehousing
46310 : Wholesale of fruit and vegetables	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Warehousing
46320 : Wholesale of meat and meat products	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Warehousing
46330 : Wholesale of dairy products, eggs and edible oils and fats	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Warehousing

5-Digit Sic Code Sector	OE Sectors	Land Use
46341 : Wholesale of fruit and vegetable juices, mineral waters and soft drinks	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Warehousing
46342 : Wholesale of wine, beer, spirits and other alcoholic beverages	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Warehousing
46350 : Wholesale of tobacco products	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Warehousing
46360 : Wholesale of sugar and chocolate and sugar confectionery	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Warehousing
46370 : Wholesale of coffee, tea, cocoa and spices	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Warehousing
46380 : Wholesale of other food, including fish, crustaceans and molluscs	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Warehousing
46390 : Non-specialised wholesale of food, beverages and tobacco	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Warehousing
46410 : Wholesale of textiles	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Warehousing
46420 : Wholesale of clothing and footwear	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Warehousing
46431 : Wholesale of gramophone records, audio tapes, compact discs and video tapes and of the equipment on which these are played	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Warehousing
46439 : Wholesale of radio and television goods and of electrical household appliances (other than of gramophone records, audio tapes, compact discs and video tapes and the equipment on which these are played) n.e.c.	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Warehousing
46440 : Wholesale of china and glassware and cleaning materials	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Warehousing
46450 : Wholesale of perfume and cosmetics	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Warehousing

5-Digit Sic Code Sector	OE Sectors	Land Use
46460 : Wholesale of pharmaceutical goods	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Warehousing
46470 : Wholesale of furniture, carpets and lighting equipment	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Warehousing
46480 : Wholesale of watches and jewellery	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Warehousing
46491 : Wholesale of musical instruments	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Warehousing
46499 : Wholesale of household goods (other than musical instruments) nec	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Warehousing
46510 : Wholesale of computers, computer peripheral equipment and software	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Warehousing
46520 : Wholesale of electronic and telecommunications equipment and parts	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Warehousing
46610 : Wholesale of agricultural machinery, equipment and supplies	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Warehousing
46620 : Wholesale of machine tools	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Warehousing
46630 : Wholesale of mining, construction and civil engineering machinery	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Warehousing
46640 : Wholesale of machinery for the textile industry and of sewing and knitting machines	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Warehousing
46650 : Wholesale of office furniture	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Warehousing
46660 : Wholesale of other office machinery and equipment	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Warehousing
46690 : Wholesale of other machinery and equipment	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Warehousing
46711 : Wholesale of petroleum and petroleum products	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Warehousing

5-Digit Sic Code Sector	OE Sectors	Land Use
46719 : Wholesale of fuels and related products (other than petroleum and petroleum products)	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Warehousing
46720 : Wholesale of metals and metal ores	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Warehousing
46730 : Wholesale of wood, construction materials and sanitary equipment	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Warehousing
46740 : Wholesale of hardware, plumbing and heating equipment and supplies	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Warehousing
46750 : Wholesale of chemical products	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Warehousing
46760 : Wholesale of other intermediate products	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Warehousing
46770 : Wholesale of waste and scrap	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Warehousing
46900 : Non-specialised wholesale trade	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Warehousing
47110 : Retail sale in non-specialised stores with food, beverages or tobacco predominating	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Non B Class
47190 : Other retail sale in non-specialised stores	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Non B Class
47210 : Retail sale of fruit and vegetables in specialised stores	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Non B Class
47220 : Retail sale of meat and meat products in specialised stores	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Non B Class
47230 : Retail sale of fish, crustaceans and molluscs in specialised stores	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Non B Class
47240 : Retail sale of bread, cakes, flour confectionery and sugar confectionery in specialised stores	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Non B Class

5-Digit Sic Code Sector	OE Sectors	Land Use
47250 : Retail sale of beverages in specialised stores	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Non B Class
47260 : Retail sale of tobacco products in specialised stores	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Non B Class
47290 : Other retail sale of food in specialised stores	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Non B Class
47300 : Retail sale of automotive fuel in specialised stores	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Non B Class
47410 : Retail sale of computers, peripheral units and software in specialised stores	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Non B Class
47421 : Retail sale of mobile telephones in specialised stores	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Non B Class
47429 : Retail sale of telecommunications equipment (other than mobile telephones) nec, in specialised stores	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Non B Class
47430 : Retail sale of audio and video equipment in specialised stores	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Non B Class
47510 : Retail sale of textiles in specialised stores	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Non B Class
47520 : Retail sale of hardware, paints and glass in specialised stores	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Non B Class
47530 : Retail sale of carpets, rugs, wall and floor coverings in specialised stores	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Non B Class
47540 : Retail sale of electrical household appliances in specialised stores	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Non B Class
47591 : Retail sale of musical instruments and scores in specialised stores	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Non B Class
47599 : Retail sale of furniture, lighting equipment and other household articles (other than musical instruments) nec, in speci	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Non B Class

5-Digit Sic Code Sector	OE Sectors	Land Use
47610 : Retail sale of books in specialised stores	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Non B Class
47620 : Retail sale of newspapers and stationery in specialised stores	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Non B Class
47630 : Retail sale of music and video recordings in specialised stores	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Non B Class
47640 : Retail sale of sporting equipment in specialised stores	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Non B Class
47650 : Retail sale of games and toys in specialised stores	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Non B Class
47710 : Retail sale of clothing in specialised stores	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Non B Class
47721 : Retail sale of footwear in specialised stores	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Non B Class
47722 : Retail sale of leather goods in specialised stores	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Non B Class
47730 : Dispensing chemist in specialised stores	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Non B Class
47741 : Retail sale of hearing aids in specialised stores	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Non B Class
47749 : Retail sale of medical and orthopaedic goods (other than hearing aids) nec, in specialised stores	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Non B Class
47750 : Retail sale of cosmetic and toilet articles in specialised stores	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Non B Class
47760 : Retail sale of flowers, plants, seeds, fertilisers, pet animals and pet food in specialised stores	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Non B Class
47770 : Retail sale of watches and jewellery in specialised stores	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Non B Class
47781 : Retail sale in commercial art galleries	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Non B Class

5-Digit Sic Code Sector	OE Sectors	Land Use
47782 : Retail sale by opticians	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Non B Class
47789 : Other retail sale of new goods in specialised stores (other than by opticians or commercial art galleries), nec	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Non B Class
47791 : Retail sale of antiques including antique books, in stores	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Non B Class
47799 : Retail sale of second-hand goods (other than antiques and antique books) in stores	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Non B Class
47810 : Retail sale via stalls and markets of food, beverages and tobacco products	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Non B Class
47820 : Retail sale via stalls and markets of textiles, clothing and footwear	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Non B Class
47890 : Retail sale via stalls and markets of other goods	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Non B Class
47910 : Retail sale via mail order houses or via Internet	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Non B Class
47990 : Other retail sale not in stores, stalls or markets	G : Wholesale and retail trade; repair of motor vehicles and motorcycles	Non B Class
49100 : Passenger rail transport, interurban	H : Transportation and storage	Non B Class
49200 : Freight rail transport	H : Transportation and storage	Non B Class
49311 : Urban, suburban or metropolitan area passenger railway transportation by underground, metro and similar systems	H : Transportation and storage	Non B Class
49319 : Urban, suburban or metropolitan area passenger land transport other than railway transportation by underground, metro and similar systems	H : Transportation and storage	Non B Class
49320 : Taxi operation	H : Transportation and storage	Non B Class
49390 : Other passenger land transport nec	H : Transportation and storage	Non B Class
49410 : Freight transport by road	H : Transportation and storage	Warehousing
49420 : Removal services	H : Transportation and storage	Warehousing

5-Digit Sic Code Sector	OE Sectors	Land Use
49500 : Transport via pipeline	H : Transportation and storage	Non B Class
50100 : Sea and coastal passenger water transport	H : Transportation and storage	Non B Class
50200 : Sea and coastal freight water transport	H : Transportation and storage	Non B Class
50300 : Inland passenger water transport	H : Transportation and storage	Non B Class
50400 : Inland freight water transport	H : Transportation and storage	Non B Class
51101 : Scheduled passenger air transport	H : Transportation and storage	Non B Class
51102 : Non-scheduled passenger air transport	H : Transportation and storage	Non B Class
51210 : Freight air transport	H : Transportation and storage	Non B Class
51220 : Space transport	H : Transportation and storage	Non B Class
52101 : Operation of warehousing and storage facilities for water transport activities of division 50	H : Transportation and storage	Warehousing
52102 : Operation of warehousing and storage facilities for air transport activities of division 51	H : Transportation and storage	Warehousing
52103 : Operation of warehousing and storage facilities for land transport activities of division 49	H : Transportation and storage	Warehousing
52211 : Operation of rail freight terminals	H : Transportation and storage	Warehousing
52212 : Operation of rail passenger facilities at railway stations	H : Transportation and storage	Warehousing
52213 : Operation of bus and coach passenger facilities at bus and coach stations	H : Transportation and storage	Warehousing
52219 : Other service activities incidental to land transportation, nec (not including operation of rail freight terminals, passenger facilities at railway stations or passenger facilities at bus and coach stations)	H : Transportation and storage	Warehousing
52220 : Service activities incidental to water transportation	H : Transportation and storage	Warehousing

5-Digit Sic Code Sector	OE Sectors	Land Use
52230 : Service activities incidental to air transportation	H : Transportation and storage	Warehousing
52241 : Cargo handling for water transport activities of division 50	H : Transportation and storage	Warehousing
52242 : Cargo handling for air transport activities of division 51	H : Transportation and storage	Warehousing
52243 : Cargo handling for land transport activities of division 49	H : Transportation and storage	Warehousing
52290 : Other transportation support activities	H : Transportation and storage	Non B Class
53100 : Postal activities under universal service obligation	H : Transportation and storage	Warehousing
53201 : Licensed Carriers	H : Transportation and storage	Warehousing
53202 : Unlicensed Carriers	H : Transportation and storage	Warehousing
55100 : Hotels and similar accommodation	I : Accommodation and food service activities	Non B Class
55201 : Holiday centres and villages	I : Accommodation and food service activities	Non B Class
55202 : Youth hostels	I : Accommodation and food service activities	Non B Class
55209 : Other holiday and other short-stay accommodation (not including holiday centres and villages or youth hostels) nec	I : Accommodation and food service activities	Non B Class
55300 : Camping grounds, recreational vehicle parks and trailer parks	I : Accommodation and food service activities	Non B Class
55900 : Other accommodation	I : Accommodation and food service activities	Non B Class
56101 : Licensed restaurants	I : Accommodation and food service activities	Non B Class
56102 : Unlicensed restaurants and cafes	I : Accommodation and food service activities	Non B Class

5-Digit Sic Code Sector	OE Sectors	Land Use
56103 : Take away food shops and mobile food stands	I : Accommodation and food service activities	Non B Class
56210 : Event catering activities	I : Accommodation and food service activities	Non B Class
56290 : Other food service activities	I : Accommodation and food service activities	Non B Class
56301 : Licensed clubs	I : Accommodation and food service activities	Non B Class
56302 : Public houses and bars	I : Accommodation and food service activities	Non B Class
58110 : Book publishing	J : Information and communication	Office
58120 : Publishing of directories and mailing lists	J : Information and communication	Office
58130 : Publishing of newspapers	J : Information and communication	Office
58141 : Publishing of learned journals	J : Information and communication	Office
58142 : Publishing of consumer, business and professional journals and periodicals	J : Information and communication	Office
58190 : Other publishing activities	J : Information and communication	Office
58210 : Publishing of computer games	J : Information and communication	Office
58290 : Other software publishing	J : Information and communication	Office
59111 : Motion picture production activities	J : Information and communication	Office
59112 : Video production activities	J : Information and communication	Office
59113 : Television programme production activities	J : Information and communication	Office
59120 : Motion picture, video and television programme post-production activities	J : Information and communication	Office
59131 : Motion picture distribution activities	J : Information and communication	Office
59132 : Video distribution activities	J : Information and communication	Office

5-Digit Sic Code Sector	OE Sectors	Land Use
59133 : Television programme distribution activities	J : Information and communication	Office
59140 : Motion picture projection activities	J : Information and communication	Office
59200 : Sound recording and music publishing activities	J : Information and communication	Office
60100 : Radio broadcasting	J : Information and communication	Office
60200 : Television programming and broadcasting activities	J : Information and communication	Office
61100 : Wired telecommunications activities	J : Information and communication	Office
61200 : Wireless telecommunications activities	J : Information and communication	Office
61300 : Satellite telecommunications activities	J : Information and communication	Office
61900 : Other telecommunications activities	J : Information and communication	Office
62011 : Ready-made interactive leisure and entertainment software development	J : Information and communication	Office
62012 : Business and domestic software development	J : Information and communication	Office
62020 : Computer consultancy activities	J : Information and communication	Office
62030 : Computer facilities management activities	J : Information and communication	Office
62090 : Other information technology and computer service activities	J : Information and communication	Office
63110 : Data processing, hosting and related activities	J : Information and communication	Office
63120 : Web portals	J : Information and communication	Office
63910 : News agency activities	J : Information and communication	Office
63990 : Other information service activities nec	J : Information and communication	Office
64110 : Central banking	K : Financial and insurance activities	Office
64191 : Banks	K : Financial and insurance activities	Office

5-Digit Sic Code Sector	OE Sectors	Land Use
64192 : Building societies	K : Financial and insurance activities	Office
64201 : Activities of agricultural holding companies	K : Financial and insurance activities	Office
64202 : Activities of production holding companies	K : Financial and insurance activities	Office
64203 : Activities of construction holding companies	K : Financial and insurance activities	Office
64204 : Activities of distribution holding companies	K : Financial and insurance activities	Office
64205 : Activities of financial services holding companies	K : Financial and insurance activities	Office
64209 : Activities of other holding companies (not including agricultural, production, construction, distribution and financial services holding companies) n.e.c	K : Financial and insurance activities	Office
64301 : Activities of investment trusts	K : Financial and insurance activities	Office
64302 : Activities of unit trusts	K : Financial and insurance activities	Office
64303 : Activities of venture and development capital companies	K : Financial and insurance activities	Office
64304 : Activities of open-ended investment companies	K : Financial and insurance activities	Office
64305 : Activities of property unit trusts	K : Financial and insurance activities	Office
64306 : Activities of real estate investment trusts	K : Financial and insurance activities	Office
64910 : Financial leasing	K : Financial and insurance activities	Office
64921 : Credit granting by non-deposit taking finance houses and other specialist consumer credit grantors	K : Financial and insurance activities	Office
64922 : Activities of mortgage finance companies	K : Financial and insurance activities	Office
64929 : Other credit granting (not including credit granting by non-deposit taking finance houses and other specialist consumer credit grantors and activities of mortgage finance companies) n.e.c.	K : Financial and insurance activities	Office

5-Digit Sic Code Sector	OE Sectors	Land Use
64991 : Security dealing on own account	K : Financial and insurance activities	Office
64992 : Factoring	K : Financial and insurance activities	Office
64999 : Other financial service activities, except insurance and pension funding, (not including security dealing on own account and factoring) n.e.c.	K : Financial and insurance activities	Office
65110 : Life insurance	K : Financial and insurance activities	Office
65120 : Non-life insurance	K : Financial and insurance activities	Office
65201 : Life reinsurance	K : Financial and insurance activities	Office
65202 : Non-life reinsurance	K : Financial and insurance activities	Office
65300 : Pension funding	K : Financial and insurance activities	Office
66110 : Administration of financial markets	K : Financial and insurance activities	Office
66120 : Security and commodity contracts brokerage	K : Financial and insurance activities	Office
66190 : Other activities auxiliary to financial services, except insurance and pension funding	K : Financial and insurance activities	Office
66210 : Risk and damage evaluation	K : Financial and insurance activities	Office
66220 : Activities of insurance agents and brokers	K : Financial and insurance activities	Office
66290 : Other activities auxiliary to insurance and pension funding	K : Financial and insurance activities	Office
66300 : Fund management activities	K : Financial and insurance activities	Office
68100 : Buying and selling of own real estate	L : Real estate activities	Office
68201 : Renting and operating of Housing Association real estate	L : Real estate activities	Office
68202 : Letting and operating of conference and exhibition centres	L : Real estate activities	Office
68209 : Letting and operating of own or leased real estate (other than Housing Association real estate and conference and exhibition services) n.e.c.	L : Real estate activities	Non B Class

5-Digit Sic Code Sector	OE Sectors	Land Use
68310 : Real estate agencies	L : Real estate activities	Non B Class
68320 : Management of real estate on a fee or contract basis	L : Real estate activities	Office
69101 : Barristers at law	M : Professional, scientific and technical activities	Office
69102 : Solicitors	M : Professional, scientific and technical activities	Office
69109 : Activities of patent and copyright agents; other legal activities (other than those of barristers and solicitors) nec	M : Professional, scientific and technical activities	Office
69201 : Accounting, and auditing activities	M : Professional, scientific and technical activities	Office
69202 : Bookkeeping activities	M : Professional, scientific and technical activities	Office
69203 : Tax consultancy	M : Professional, scientific and technical activities	Office
70100 : Activities of head offices	M : Professional, scientific and technical activities	Office
70210 : Public relations and communication activities	M : Professional, scientific and technical activities	Office
70221 : Financial management	M : Professional, scientific and technical activities	Office
70229 : Management consultancy activities (other than financial management)	M : Professional, scientific and technical activities	Office
71111 : Architectural activities	M : Professional, scientific and technical activities	Office
71112 : Urban planning and landscape architectural activities	M : Professional, scientific and technical activities	Office
71121 : Engineering design activities for industrial process and production	M : Professional, scientific and technical activities	Office

5-Digit Sic Code Sector	OE Sectors	Land Use
71122 : Engineering related scientific and technical consulting activities	M : Professional, scientific and technical activities	Office
71129 : Other engineering activities (not including engineering design for industrial process and production or engineering related scientific and technical consulting activities)	M : Professional, scientific and technical activities	Office
71200 : Technical testing and analysis	M : Professional, scientific and technical activities	B1b
72110 : Research and experimental development on biotechnology	M : Professional, scientific and technical activities	B1b
72190 : Other research and experimental development on natural sciences and engineering	M : Professional, scientific and technical activities	B1b
72200 : Research and experimental development on social sciences and humanities	M : Professional, scientific and technical activities	B1b
73110 : Advertising agencies	M : Professional, scientific and technical activities	Office
73120 : Media representation	M : Professional, scientific and technical activities	Office
73200 : Market research and public opinion polling	M : Professional, scientific and technical activities	Office
74100 : Specialised design activities	M : Professional, scientific and technical activities	Office
74201 : Portrait photographic activities	M : Professional, scientific and technical activities	Industrial/Light Industrial
74202 : Other specialist photography (not including portrait photography)	M : Professional, scientific and technical activities	Industrial/Light Industrial
74203 : Film processing	M : Professional, scientific and technical activities	Industrial/Light Industrial
74209 : Other photographic activities (not including portrait and other specialist photography and film processing) nec	M : Professional, scientific and technical activities	Industrial/Light Industrial

5-Digit Sic Code Sector	OE Sectors	Land Use
74300 : Translation and interpretation activities	M : Professional, scientific and technical activities	Office
74901 : Environmental consulting activities	M : Professional, scientific and technical activities	Office
74902 : Quantity surveying activities	M : Professional, scientific and technical activities	Office
74909 : Other professional, scientific and technical activities (not including environmental consultancy or quantity surveying)	M : Professional, scientific and technical activities	Office
75000 : Veterinary activities	M : Professional, scientific and technical activities	Non B Class
77110 : Renting and leasing of cars and light motor vehicles	N : Administrative and support service activities	Non B Class
77120 : Renting and leasing of trucks	N : Administrative and support service activities	Non B Class
77210 : Renting and leasing of recreational and sports goods	N : Administrative and support service activities	Non B Class
77220 : Renting of video tapes and disks	N : Administrative and support service activities	Non B Class
77291 : Renting and leasing of media entertainment equipment	N : Administrative and support service activities	Non B Class
77299 : Renting and leasing of other personal and household goods (other than media entertainment equipment)	N : Administrative and support service activities	Non B Class
77310 : Renting and leasing of agricultural machinery and equipment	N : Administrative and support service activities	Non B Class
77320 : Renting and leasing of construction and civil engineering machinery and equipment	N : Administrative and support service activities	Non B Class
77330 : Renting and leasing of office machinery and equipment (including computers)	N : Administrative and support service activities	Non B Class

5-Digit Sic Code Sector	OE Sectors	Land Use
77341 : Renting and leasing of passenger water transport equipment	N : Administrative and support service activities	Non B Class
77342 : Renting and leasing of freight water transport equipment	N : Administrative and support service activities	Non B Class
77351 : Renting and leasing of passenger air transport equipment	N : Administrative and support service activities	Non B Class
77352 : Renting and leasing of freight air transport equipment	N : Administrative and support service activities	Non B Class
77390 : Renting and leasing of other machinery, equipment and tangible goods nec	N : Administrative and support service activities	Non B Class
77400 : Leasing of intellectual property and similar products, except copyrighted works	N : Administrative and support service activities	Office
78101 : Motion picture, television and other theatrical casting	N : Administrative and support service activities	Office
78109 : Activities of employment placement agencies (other than motion picture, television and other theatrical casting) nec	N : Administrative and support service activities	Office
78200 : Temporary employment agency activities	N : Administrative and support service activities	Office
78300 : Other human resources provision	N : Administrative and support service activities	Office
79110 : Travel agency activities	N : Administrative and support service activities	Non B Class
79120 : Tour operator activities	N : Administrative and support service activities	Non B Class
79901 : Activities of tourist guides	N : Administrative and support service activities	Non B Class
79909 : Other reservation service activities (not including activities of tourist guides)	N : Administrative and support service activities	Non B Class

5-Digit Sic Code Sector	OE Sectors	Land Use
80100 : Private security activities	N : Administrative and support service activities	Office
80200 : Security systems service activities	N : Administrative and support service activities	Office
80300 : Investigation activities	N : Administrative and support service activities	Office
81100 : Combined facilities support activities	N : Administrative and support service activities	Non B Class
81210 : General cleaning of buildings	N : Administrative and support service activities	Non B Class
81221 : Window cleaning services	N : Administrative and support service activities	Non B Class
81222 : Specialised cleaning services	N : Administrative and support service activities	Non B Class
81223 : Furnace and chimney cleaning services	N : Administrative and support service activities	Non B Class
81229 : Building and industrial cleaning activities (other than window cleaning, specialised cleaning and furnace and cleaning services) n.e.c.	N : Administrative and support service activities	Non B Class
81291 : Disinfecting and extermination services	N : Administrative and support service activities	Non B Class
81299 : Cleaning services (other than disinfecting and extermination services) nec	N : Administrative and support service activities	Non B Class
81300 : Landscape service activities	N : Administrative and support service activities	Non B Class
82110 : Combined office administrative service activities	N : Administrative and support service activities	Office
82190 : Photocopying, document preparation and other specialised office support activities	N : Administrative and support service activities	Office

5-Digit Sic Code Sector	OE Sectors	Land Use
82200 : Activities of call centres	N : Administrative and support service activities	Office
82301 : Activities of exhibition and fair organizers	N : Administrative and support service activities	Office
82302 : Activities of conference organizers	N : Administrative and support service activities	Office
82911 : Activities of collection agencies	N : Administrative and support service activities	Office
82912 : Activities of credit bureaus	N : Administrative and support service activities	Office
82920 : Packaging activities	N : Administrative and support service activities	Warehousing
82990 : Other business support service activities nec	N : Administrative and support service activities	Office
84110 : General public administration activities	O : Public administration and defence; compulsory social security	Office
84120 : Regulation of the activities of providing health care, education, cultural services and other social services, excluding social security	O : Public administration and defence; compulsory social security	Non B Class
84130 : Regulation of and contribution to more efficient operation of businesses	O : Public administration and defence; compulsory social security	Office
84210 : Foreign affairs	O : Public administration and defence; compulsory social security	Office
84220 : Defence activities	O : Public administration and defence; compulsory social security	Non B Class
84230 : Justice and judicial activities	O : Public administration and defence; compulsory social security	Non B Class
84240 : Public order and safety activities	O : Public administration and defence; compulsory social security	Non B Class

5-Digit Sic Code Sector	OE Sectors	Land Use
84250 : Fire service activities	O : Public administration and defence; compulsory social security	Non B Class
84300 : Compulsory social security activities	O : Public administration and defence; compulsory social security	Office
85100 : Pre-primary education	P : Education	Non B Class
85200 : Primary education	P : Education	Non B Class
85310 : General secondary education	P : Education	Non B Class
85320 : Technical and vocational secondary education	P : Education	Non B Class
85410 : Post-secondary non-tertiary education	P : Education	Non B Class
85421 : First-degree level higher education	P : Education	Non B Class
85422 : Post-graduate level higher education	P : Education	Non B Class
85510 : Sports and recreation education	P : Education	Non B Class
85520 : Cultural education	P : Education	Non B Class
85530 : Driving school activities	P : Education	Non B Class
85590 : Other education nec	P : Education	Office
85600 : Educational support activities	P : Education	Office
86101 : Hospital activities	Q : Human health and social work activities	Non B Class
86102 : Medical nursing home activities	Q : Human health and social work activities	Non B Class
86210 : General medical practice activities	Q : Human health and social work activities	Non B Class
86220 : Specialist medical practice activities	Q : Human health and social work activities	Non B Class
86230 : Dental practice activities	Q : Human health and social work activities	Non B Class

5-Digit Sic Code Sector	OE Sectors	Land Use
86900 : Other human health activities	Q : Human health and social work activities	Non B Class
87100 : Residential nursing care activities	Q : Human health and social work activities	Non B Class
87200 : Residential care activities for learning disabilities, mental health and substance abuse	Q : Human health and social work activities	Non B Class
87300 : Residential care activities for the elderly and disabled	Q : Human health and social work activities	Non B Class
87900 : Other residential care activities	Q : Human health and social work activities	Non B Class
88100 : Social work activities without accommodation for the elderly and disabled	Q : Human health and social work activities	Non B Class
88910 : Child day-care activities	Q : Human health and social work activities	Non B Class
88990 : Other social work activities without accommodation nec	Q : Human health and social work activities	Non B Class
90010 : Performing arts	R : Arts, entertainment and recreation	Non B Class
90020 : Support activities to performing arts	R : Arts, entertainment and recreation	Non B Class
90030 : Artistic creation	R : Arts, entertainment and recreation	Industrial/Light Industrial
90040 : Operation of arts facilities	R : Arts, entertainment and recreation	Non B Class
91011 : Library activities	R : Arts, entertainment and recreation	Non B Class
91012 : Archive activities	R : Arts, entertainment and recreation	Non B Class
91020 : Museum activities	R : Arts, entertainment and recreation	Non B Class

5-Digit Sic Code Sector	OE Sectors	Land Use
91030 : Operation of historical sites and buildings and similar visitor attractions	R : Arts, entertainment and recreation	Non B Class
91040 : Botanical and zoological gardens and nature reserve activities	R : Arts, entertainment and recreation	Non B Class
92000 : Gambling and betting activities	R : Arts, entertainment and recreation	Non B Class
93110 : Operation of sports facilities	R : Arts, entertainment and recreation	Non B Class
93120 : Activities of sport clubs	R : Arts, entertainment and recreation	Non B Class
93130 : Fitness facilities	R : Arts, entertainment and recreation	Non B Class
93191 : Activities of racehorse owners	R : Arts, entertainment and recreation	Non B Class
93199 : Other sports activities (not including activities of racehorse owners) nec	R : Arts, entertainment and recreation	Non B Class
93210 : Activities of amusement parks and theme parks	R : Arts, entertainment and recreation	Non B Class
93290 : Other amusement and recreation activities	R : Arts, entertainment and recreation	Non B Class
94110 : Activities of business and employers membership organisations	S : Other service activities	Office
94120 : Activities of professional membership organisations	S : Other service activities	Office
94200 : Activities of trade unions	S : Other service activities	Office
94910 : Activities of religious organisations	S : Other service activities	Office
94920 : Activities of political organisations	S : Other service activities	Office
94990 : Activities of other membership organisations nec	S : Other service activities	Office
95110 : Repair of computers and peripheral equipment	S : Other service activities	Industrial/Light Industrial
95120 : Repair of communication equipment	S : Other service activities	Industrial/Light Industrial

5-Digit Sic Code Sector	OE Sectors	Land Use
95210 : Repair of consumer electronics	S : Other service activities	Industrial/Light Industrial
95220 : Repair of household appliances and home and garden equipment	S : Other service activities	Industrial/Light Industrial
95230 : Repair of footwear and leather goods	S : Other service activities	Industrial/Light Industrial
95240 : Repair of furniture and home furnishings	S : Other service activities	Industrial/Light Industrial
95250 : Repair of watches, clocks and jewellery	S : Other service activities	Industrial/Light Industrial
95290 : Repair of other personal and household goods	S : Other service activities	Industrial/Light Industrial
96010 : Washing and (dry-)cleaning of textile and fur products	S : Other service activities	Non B Class
96020 : Hairdressing and other beauty treatment	S : Other service activities	Non B Class
96030 : Funeral and related activities	S : Other service activities	Non B Class
96040 : Physical well-being activities	S : Other service activities	Non B Class
96090 : Other personal service activities nec	S : Other service activities	Non B Class
97000 : Activities of households as employers of domestic personnel	S : Other service activities	Non B Class
98100 : Undifferentiated goods-producing activities of private households for own use	S : Other service activities	Non B Class
98200 : Undifferentiated service-producing activities of private households for own use	S : Other service activities	Non B Class
99000 : Activities of extraterritorial organisations and bodies	S : Other service activities	Non B Class

ekosgen

Part of Insight