



**PLANNING,  
REGENERATION +  
INFRASTRUCTURE  
EMPLOYMENT  
LAND REVIEW**

Employment Land  
Availability Assessment

Thurrock Council  
February 2023

Prepared by: Tim Knight  
Associate Director

Reviewed by: Alex Roberts  
Director

This document has been prepared and checked in accordance with the Lambert Smith Hampton Quality Assurance procedures and authorised for release.

Signed:



.....  
For and on behalf of Lambert Smith Hampton

9 Bond Court  
Leeds  
LS1 2JZ

## CONTENTS PAGE

	<b>EXECUTIVE SUMMARY</b>	
<b>1.0</b>	<b>INTRODUCTION</b> .....	<b>6</b>
1.1	Overview .....	6
1.2	Data from Council.....	6
1.3	Desktop Assessment.....	8
1.4	Site Visits.....	9
1.5	Site Assessment Matrices .....	9
<b>2.0</b>	<b>PLANNING POLICY CONTEXT</b> .....	<b>10</b>
2.1	Local Policy Context.....	10
2.2	National Policy Context .....	13
2.3	Summary .....	17
<b>3.0</b>	<b>COMMERCIAL PROPERTY MARKET REVIEW</b> .....	<b>18</b>
3.1	Data Sources.....	18
3.2	Macro Market Factors .....	18
3.3	The Office Market.....	19
3.4	The Industrial Market.....	25
3.5	Industrial Transactions .....	33
3.6	Availability of Industrial and Warehouse Premises .....	38
3.7	Summary/Conclusion .....	41
<b>4.0</b>	<b>EXISTING STOCK OF EMPLOYMENT LAND</b> .....	<b>43</b>
4.1	Overview .....	43
4.2	Findings and Recommendations.....	45
<b>5.0</b>	<b>AVAILABLE AND POTENTIAL EMPLOYMENT SITES IN THURROCK</b> .....	<b>49</b>
5.1	Assumptions.....	49
5.2	Context .....	49
5.3	Quantitative Analysis.....	53
5.4	Immediately Available Employment Land .....	57
5.5	Potential Sites .....	59
<b>6.0</b>	<b>CONCLUSION</b> .....	<b>64</b>
6.1	Land for Office Development .....	64
6.2	Land for Industrial and Warehouse Development.....	64
	<b>APPENDIX 1 - MAPS OF EXISTING AND POTENTIAL EMPLOYMENT AREAS</b> .....	<b>67</b>
	<b>APPENDIX 2 - MATRIX OF EXISTING EMPLOYMENT AREAS</b> .....	<b>68</b>
	<b>APPENDIX 3 – MATRIX OF AVAILABLE EMPLOYMENT SITES</b> .....	<b>69</b>
	<b>APPENDIX 4 – ASSESSMENT CRITERIA</b> .....	<b>70</b>
	<b>APPENDIX 5 – GLOSSARY OF TERMS</b> .....	<b>71</b>
	<b>APPENDIX 6 – TAKE-UP OF EMPLOYMENT LAND 2004-2021</b> .....	<b>73</b>
	<b>APPENDIX 7 - MATRIX OF POTENTIAL EMPLOYMENT SITES</b> .....	<b>74</b>
	<b>APPENDIX 8 – SITES EXCLUDED FROM ANALYSIS</b> .....	<b>75</b>
	<b>APPENDIX 9 – INDUSTRIAL TRANSACTIONS 2017-22</b> .....	<b>77</b>

## EXECUTIVE SUMMARY

- i. Lambert Smith Hampton (LSH) is instructed by Thurrock Council to undertake an assessment of the employment land across the borough.
- ii. The purpose of the report is to provide an assessment of employment land (Use Classes E (business), B2, and B8) as set out in the Town and Country Planning (Use Classes) (Amendment) (England) Regulations 2020 to identify a suitable, available and achievable supply of land for economic development to inform local planning policy. It will help to determine if sufficient land can be identified in Thurrock to meet the quantitative and qualitative needs identified in the 2023 EDNA.
- iii. This assessment of employment land is split into four main sections: a commercial market review, an assessment of existing employment areas, an assessment of available employment sites and an assessment of potential employment land.

### **Commercial Property Market Review**

- iv. The review of the commercial property market considers the market for offices and industrial premises in Thurrock through analysis of the stock, availability and demand. We have compiled data from various sources into tables and graphs to enable analysis; we compare the market over the period 2017 to 2022.
- v. The borough's commercial activity is dominated by the industrial and logistics sector. Data from the Valuation Office Agency identifies that office floorspace is less than 5% of employment floorspace in Thurrock. There are 79,000 sq m of offices compared to 1,658,000 sq m of industrial floorspace. Having regard to the limited size of the office market in Thurrock, and to ensure that there is sufficient land for employment purposes over the period of the Local Plan this ELAA focusses more heavily on the industrial and logistics markets.
- vi. The importance of the industrial and logistics sectors to the borough is due to geography and transport links. The borough is a key location for international trade and a transport hub for the South East with ports at Purfleet, Tilbury and London Gateway, it straddles London's orbital M25 motorway and has good road access into London as well as the wider South East and beyond.
- vii. London Gateway has been very successful in attracting national industrial and logistics occupiers to the borough, combining a container terminal and logistics park. The logistics park benefits from a local development order meaning that it can respond quickly to occupier demands for bespoke premises and

can accommodate future expansion options. The data shows that 50% of take-up of industrial floorspace in the borough for the period 2017 to 2022 has been at London Gateway.

- viii. Some 68% of floorspace taken up in the borough has been in units in excess of 10,000 sq m, demonstrating that larger warehouses are an important component of occupier demand. However 72% of units taken up have been less than 2,000 sq m, demonstrating that there is an active local market for smaller premises for a wide range of uses including engineering, manufacturing, waste management, plant hire, storage, logistics etc. Thurrock therefore has strong demand from the local market as well as being an important regional/sub-regional location for larger premises.
- ix. This strong period of take-up comes with pressures on availability; just 3% of industrial units were vacant at the time of our survey in the summer of 2022. The strength of demand is illustrated by high levels of occupancy amongst poor quality stock and businesses occupying sites which may not be entirely suitable. Both availability and pipeline supply are relatively thin with limited options across the size bands. Take-up has averaged 11,933 sq m per annum over the last five years and the existing availability of industrial premises suggests only 13 months of supply. This supply is made up of 39 existing premises totalling 17,781 sq m; and 6 logistics units with planning consent or under construction totalling 89,314 sqm. The existing premises are between 85 and 1,033 sq m, whereas the logistics premises in the pipeline are larger 3,000 to 36,000. The market is overly reliant on the land immediately available at London Gateway, which does not suit all sizes and types of requirement. The Council should look to allocate and service additional land to meet wider market requirements.

#### **Existing Employment Areas**

- x. LSH has assessed 52 employment areas with a combined area of 1,343 hectares. The majority of these areas are well occupied, which is evidence of the tight market for general employment land and premises. In these circumstances they should be retained for employment use. LSH has reviewed the existing boundaries of some employment areas to include adjoining land that is now in employment use or to exclude parts of an industrial area which have become lost entirely to or are now dominated by an alternative use. Revising boundaries will help to bring clarity to the implementation of planning policy.
- xi. Within Thurrock there are a few employment areas which are occupied by a single business and have been developed to meet their specific requirements. Should the business vacate, there may be little interest in the buildings for reoccupation. In such cases LSH recommends that the Council adopts a pragmatic approach to continued employment use, particularly if the costs of demolition and site clearance could undermine the viability of redevelopment. The Local Plan should include a policy that

requires sufficient marketing of the buildings and site for continuing employment use, to accompany any applications for non B2 or B8 employment use.

- xii. The redevelopment of single user sites can be easier than estates in multiple occupation, as delivery is not frustrated by site assembly issues. The proposals for the Titan Works are a good example of this. Once ICL vacates, Chancerygate propose to redevelop the site to provide 28 industrial units. Levels of market demand and values are generally sufficient to enable viable speculative industrial development, such as this, by the private sector.
- xiii. Thurrock, however, has a high proportion of industrial estates in multiple occupation, with poor quality infrastructure, constrained circulation and limited parking. As highlighted above this can significantly frustrate the redevelopment or reconfiguration of existing estates. The Council should consider the preparation of investment strategies to address these issues. In the longer term the provision of higher quality industrial estates elsewhere can encourage business to relocate at which point upgrading or redevelopment of older estates may become more practicable. However, premises on poor quality estates are typically at lower rents, meaning that some business who require low overheads, or are not concerned about the quality of space may be reluctant to relocate. In these circumstances the Council should consider the use its compulsory purchase powers to enable regeneration.
- xiv. The oil refinery at Coryton has contracted and surplus land is being marketed for wider employment use. LSH recommends that the land to the north of the Coryton oil refinery, which was allocated as oil refinery expansion land, is no longer needed and therefore the allocation could be removed for me the development plan. The major regeneration scheme at Purfleet proposes the clearance of around 50 hectares of poor quality employment areas, parts of which are vacant. The scheme also proposes new film & TV studios on around 10 hectares which could, if successful, result in a net increase in employment. The Council should also consider reallocating or deallocating parts or all of a small number of existing employment areas where there is evidence of higher vacancies and buildings are reaching the end of their functional economic life; this would enable redevelopment for alternative uses.
- xv. There is a strong case for allocation of additional land in the Purfleet / West Thurrock / Grays area to accommodate general industrial demand, to complement the freeport areas at London Gateway and Tilbury and the process industry uses at Thames Enterprise Park, which although having high volumes of land, will appeal to only some sectors of the market.

**Available Employment Sites**

- xvi. Within the borough's existing employment areas there are 51 available sites with a combined total gross site area of 377 hectares and an estimated net developable area of 311 hectares. Some available employment sites are within employment areas which due to age, quality or changes in the local economy could be considered unsuitable for continued employment purposes. Through our qualitative assessment and discussions with the Council, eight sites totalling 17 hectares have been discounted from the supply which reduces supply to 294 hectares. When measured against past take-up of employment land of 16.93 hectares per annum, this equates to 17 years supply.
- xvii. Although this suggests that there is sufficient land available for the period of the Local Plan, this available land is concentrated in the eastern end of the borough. Here London Gateway Logistics Park, Thames Enterprise Park (the former Shell Haven site at Coryton which adjoins London Gateway) and the Oil Refinery Expansion Land account for 80% of the borough's available land. By contrast, in the employment areas of Purfleet and West Thurrock where 55% of take-up has occurred, available land equates to only three years supply. This suggests that there is a mis-match between where demand has been strong and where land is currently available; the Council should consider taking action to address this imbalance.
- xviii. This geographical concentration of available land in the eastern end of the borough is even more pronounced when assessing employment land that is immediately available (and recommended for retention). Of 112 hectares some 93% is at London Gateway or Thames Enterprise Park. Only three sites totalling 7.88 hectares are outside of these areas illustrating the constraints on development of general industrial premises.

**Potential Employment Land**

- xix. There is a clear need for the Council to identify additional employment areas to ensure a suitable range and choice of sites as the current portfolio is skewed towards port and logistics sectors where there has rightly been substantial provision but arguably to the neglect of demand for general employment premises.
- xx. We have assessed 29 potential employment areas with a combined gross area of 834 hectares. Most of the potential sites are within the Green Belt and in selecting sites to allocate, their importance to fulfilling the purposes of Green Belt should be considered. Attributes of all potential sites are compared in an assessment matrix. Development viability will be strongest where utilities and other infrastructure are in close proximity, and on sites with modest abnormal costs of site preparation. Other factors to consider are access to the strategic highway network and compatibility with nearby uses.

- xxi. The government has designated Freeport sites within the Borough at London Gateway and Port of Tilbury. The Freeport designation is a financial tool and has no planning status. Some of these Freeport sites are existing employment areas which are assessed as part of the Council's employment site portfolio; other land within the Freeport we have assessed as potential sites. The estimated net developable area of Thames Freeport sites which as yet have no planning consent is 140 hectares. The effect of allocating sites with Freeport designation would be to further concentrate supply within the eastern part of the borough.
- xxii. To address the shortfall of general employment land, particularly within the Grays, West Thurrock and Purfleet area, the Council should consider allocating additional land. Our analysis of past take-up within this locality would supports the allocation of up to 120 hectares, but the spatial distribution of employment development over the plan period will be influenced by the existing Local Development Order (LDO) at London Gateway, the financial incentives at the Freeport and the prospect of the Lower Thames Crossing opening; all of which could be expected to draw demand eastwards. Though the requirement for land in the west of the borough is expected to be diminished, some additional allocations should be considered. Our qualitative assessment identifies that there are potential sites in this location which would be able to contribute to the supply. Moreover, the owners of some of these sites are proposing the development of a range of unit sizes that could address current shortages amongst smaller unit sizes.
- xxiii. The call for sites exercise carried out by the Council identified some potential sites that appear to be dependent to some extent on infrastructure provided in conjunction with the Lower Thames Crossing. Current uncertainty regarding infrastructure expenditure and government priorities casts some doubt as to whether the new road will progress and be completed by 2032. It seems premature to allocate sites prior to the DCO being permitted. We recommend that the Council reconsiders the allocation of these sites in due course, as part of the five year review process.
- xxiv. The call for sites has also identified a site to the north of Bulphan which would substantially increase the established cluster of employment premises around Blue House Farm. This site is close to the northern boundary of Thurrock, and we recommend that the Council co-operates with Brentwood and Basildon Borough Councils to better understand the balance between the supply of, and demand for, employment land in this sub area and specifically whether there is a shortfall of employment land in the adjoining authority, that might justify allocating land at Bulphan.



## 1.0 INTRODUCTION

### 1.1 Overview

1.1.1 LSH is instructed by Thurrock Council to undertake an Employment Land Availability Assessment (ELAA) to inform planning policy in the borough. The Assessment is to cover three main areas of work:

- A review of commercial property markets in Thurrock,
- A baseline review of the existing stock of employment land, and
- An assessment of available employment sites and potential employment sites.

1.1.2 In line with planning practice guidance (paragraph 001, ref: 3-001-20190722), the assessment of land:

- Identifies sites and broad locations with the potential for employment development;
- Assesses the development potential of sites; and
- Assesses the suitability, availability, and achievability of the sites.

1.1.3 The Council has appointed Hatch Regeneris to prepare an Employment Development Needs Assessment and other work. There is a degree of overlap between the Employment Development Needs Assessment and the Employment Land Availability Assessment, notably our review of past take-up of land for employment purposes, which is a useful sense check for estimates of need derived from economic forecasting.

1.1.4 Hatch Regeneris have also carried out stakeholder engagement work which has informed this Employment Land Availability Assessment.

1.1.5 The approach and methodology by which the sites were identified and assessed is set out below.

### 1.2 Data from Council

1.2.1 Thurrock Council has provided a list of 109 areas and/or plots for consideration. These include established and potential employment areas and available and developed employment sites. This spreadsheet of sites is cross referenced to mapping. LSH has reviewed the list of sites and have categorised them, having regard to definitions set out in Appendix 5.

1.2.2 The mapping provided by the Council excludes the port at Tilbury and the container terminal at London Gateway. To be consistent LSH has excluded port land from its analysis and have not assessed them as existing employment areas. These existing port areas are

- Tilbury Docks (excluding Fortress Distribution Park)
- Tilbury 2 (Ro-Ro terminal and CMAT)
- London Gateway port and container terminal (but not the logistics park to the rear)
- Purfleet Thames container terminal

The extent of these ports are shown coloured in blue (for identification purposes only) on the map at Appendix 1.

1.2.3 LSH understands that Thurrock Council does not have port specific planning policies and port operators will be reluctant for restrictions to be imposed on uses and operations. In times of strong demand, ports typically aim to accommodate businesses that are using the quays, as these will generate import/export dues as well as rents. In times of weak demand, they may want to take businesses that do not use the quays and which might otherwise locate in general employment areas. The Council should consider port specific policies to avoid land within ports being taken-up for more general employment use. The designation of the Thames Freeport is expected to impact on occupiers' choice of location through the financial advantages to businesses that are importing and exporting and could undermine demand for premises within ports and general employment areas.

1.2.4 For a site to be available for employment development it cannot already be developed and occupied. Our assessment of suitability, availability and achievability therefore covers available and potential employment sites but is not relevant to the assessment of existing employment areas. Within existing employment areas parts may be underutilised. From our research under-utilisation is most prevalent amongst large businesses occupying a complex of buildings and holding land for expansion. Such land is not available to the market and is thus excluded from the assessment of available sites (see glossary at Appendix 5) unless there is evidence to the contrary. In other situations, the "underutilised" land may be performing other functions, such as SUDS balancing ponds, landscaping, mitigation of biodiversity loss or acting as a buffer for more sensitive uses. The following are examples:

- The southern part of the Industrial Chemicals complex at Stoneness Road is underutilised. The business is proposing to vacate Titan Works and consolidate on this riverside site. This might be expected to lead to an intensification of use.
- Woodland to the north-west of Carpetright's Purfleet warehouse could accommodate expansion, but will act as a buffer for the Purfleet Centre Regeneration and provides habitat, etc.
- Woodland to the north of Tesco's warehouse at Dolphin Park, Purfleet may be providing habitat, landscaping, a buffer for housing and future expansion opportunities.

None of these areas of land are on the market nor accessible except across land in the ownership of the adjoining business, hence they have not been included within our assessment.

1.2.5 Maps showing Thurrock's employment areas and sites are at Appendix 1.

### **1.3 Desktop Assessment**

1.3.1 LSH has reviewed the Council's list of sites to distinguish the different categories of land. Available sites, sites taken up for employment purposes, existing employment areas and potential employment areas have been separately assessed. Available employment sites can be part or all of an existing employment area. Further to site inspections and this categorisation process sites that, for a variety of reasons, do not require further analysis have been listed at Appendix 8, with reasons for their exclusion and other recommendations.

1.3.2 From the information provided by the Council, from our site inspections and from our own research LSH has identified:

- 52 existing employment areas (see matrix at Appendix 2).
- 51 available employment sites (see matrix at Appendix 3)
- 149 sites taken-up for employment purposes in the 18 years 2004 to 2021 (listed at Appendix 6)
- 29 potential employment areas (see matrix at Appendix 7)

1.3.3 Our assessments of available employment land and potential employment areas use the same set of criteria. These are set out at Appendix 4 and are summarised below.

- Access to Strategic Highway Network
- Site Characteristics & Physical Constraints – topography, site shape, flood risk, size
- Infrastructure – roads, lighting, landscaping, mains, utilities
- Market attractiveness – demand, location profile, viability
- Barriers to development – serviced plot, remediation, infrastructure
- Ownership factors
- Local Road Access – free moving roads, adjacent residential uses, junctions
- Proximity to Urban Areas – proximity to town centre, access to housing areas, proximity to bus stop or train station
- Compatibility of adjacent uses
- Planning Sustainability – brownfield site, conformity with extant policy, settlement boundary, planning consents

- Sequential Status
- Suitability, Availability and Achievability

#### **1.4 Site Visits**

1.4.1 In addition to desktop assessments, physical site surveys have also been undertaken. These site visits took place over three days in August 2022. In a few instances access to the edge of a site was not possible, in such cases greater reliance has been placed on Google Earth imagery which, across most of the borough, is less than a year old and is thus likely to capture a site's current attributes.

1.4.2 The visits enabled us to understand further the site-specific characteristics, such as vacancy, quality, surrounding uses, parking, active use, and access. From these site visits we could assess whether existing employment areas remain suited to future employment use.

1.4.3 The site visits have enabled LSH to accurately assess the amount of available employment land as at August 2022, providing a baseline from which to assess whether there is sufficient land in the right places for the period of the Local Plan, or whether additional land should be allocated for employment purposes.

#### **1.5 Site Assessment Matrices**

1.5.1 The information gathered through the site visits and desktop assessments is summarised in a series of site assessment matrices. These capture quantitative and qualitative factors to allow an assessment of the suitability, availability and deliverability of each site and ultimately to make a recommendation on whether the site could be developed to deliver new employment floorspace.

## 2.0 PLANNING POLICY CONTEXT

### 2.1 Local Policy Context

2.1.1 The adopted Local Plan for Thurrock is the Core Strategy that was adopted on December 2011, and updated in January 2015.

2.1.2 The Local Plan identifies numerous Strategic Spatial Objectives. The second spatial objective 'SSO2' is to:

*'Increase prosperity and employment growth in Thurrock in the five strategic Economic Hubs of Purfleet, Lakeside/West Thurrock, Grays, Tilbury and London Gateway whilst seeking a sustainable balance between housing and jobs growth across the Borough supported by integration and phasing with existing and planned transport and community infrastructure.'*

2.1.3 Policy CSSP2 Sustainable Employment Growth identifies that the Council will promote and support economic development in Key Strategic Economic Hubs that seek to expand upon their existing core sectors and/or provide opportunities in the growth sectors. As part of this, the policy states that:

*'The Key Strategic Economic Hubs and other sites will supply approximately 456 Ha (gross) of employment land, including circa 245 Ha at the London Gateway development. There is sufficient previously developed land in the Key Strategic Economic Hubs to accommodate the proposed jobs numbers with the exception of the Green Belt release North of Tilbury to provide expansion land for port related development. The final site boundaries will be included in the Adopted Site Specific Allocations and Policies DPD and identified on the Proposals Map.'*

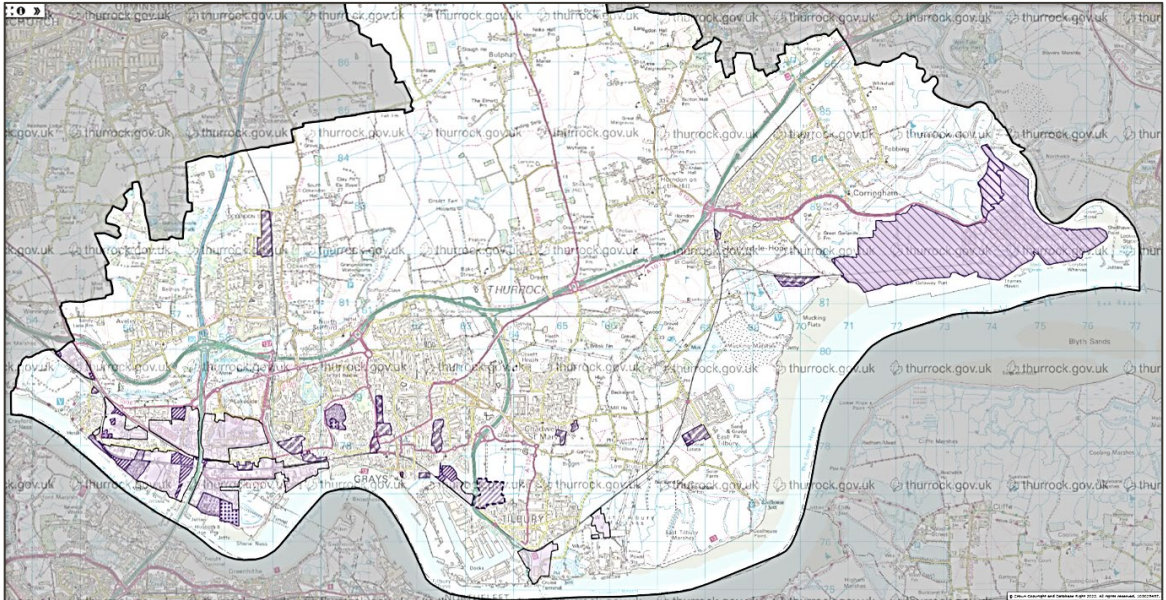
2.1.4 Policy CSTP6 Strategic Employment Provision identifies that employment growth at Key Strategic Employment Hubs will be reinforced:

*'The Council will actively seek to maintain high and stable levels of economic and employment growth by creating a network of high quality, mutually reinforcing Key Strategic Economic Hubs, identified in Policy CSSP2. The Key Strategic Economic Hubs will provide 445 hectares of the Industrial and Commercial and Mixed-Use Land between 2009 and 2026. This provision is included in 2 and 3 below.'*

2.1.5 With regard to Primary and Secondary Industrial and Commercial Areas, Policy CSTP6 identifies that the council will safeguard existing Primary and Secondary Industrial and Commercial land and premises in, or last used for employment purposes, where it is required to maintain a sufficient supply of employment land in the Plan period. Furthermore, the proposed new Primary and Secondary Industrial and

Commercial sites (identified in the Site Allocations and Policies DPD and Proposals Map) will provide approximately 372 hectares of net employment land across the Borough between 2009 and 2026, as shown on the extract from the policy map below.

**Figure 2.1: Allocated Employment Areas**



2.1.6 Policy CSTP6 also identifies that the Council will encourage development that maximises the employment contribution from mixed use development, and in total, the Council has designated 75.4 hectares of land throughout the Borough for mixed-use development between 2009 and 2026.

2.1.7 Considering Office Development, Policy CSTP6 states:

*'The Council will seek to direct office development to the town centres identified on the Key Diagram and the Key Strategic Economic Hubs. The Council will review locations for office development as part of the Development Plan Documents on Lakeside. Office development will generally be supported in the Primary and Secondary Industrial and Commercial areas provided that it is accessible by sustainable modes of transport and that it does not:*

- (i) Impact upon the viability and amenity of surrounding uses.*
- (ii) Unacceptably impact upon the road capacity and network.'*

2.1.8 Thurrock are currently preparing a new Local Plan. Between December 2018 and March 2019 a formal Options and Issues consultation was undertaken. As part of the development of the New Local Plan, an Economic Development Needs Assessment (EDNA), and an Employment Land Availability Assessment (ELAA) have been commissioned.

2.1.9 The South Essex Economic Development Needs Assessment was published in December 2017. This was commissioned on behalf of the South Essex local authorities: Basildon Borough Council, Castle Point Borough Council, Rochford District Council, Southend-on-Sea Borough Council and Thurrock Borough Council.

2.1.10 For Thurrock, a base employment forecast for growth was produced. Following this, three employment growth scenarios were produced to make adjustments to the base forecast assumptions, reflecting a suitable range of alternatives for considering the future economic growth in Thurrock, and the consequent employment floorspace and land requirements:

- B8 Demand Adjustment Scenario
- London Industrial Land Re-location Scenario
- Creative Industries Growth Scenario

**Table 2.1: Summary of Thurrock Employment Growth Forecasts & Floorspace Requirements (2016-36)**

Floorspace (sqm)	Total	Office	Manufacturing / Industrial	Warehouse
Baseline	70,194	28,093	19,626	22,475
B8 Demand Adjustment	991,850	28,093	19,626	944,131
London Industrial Land Re-location	398,693	28,093	111,180	259,420
Creative Industries Growth	70,767	28,397	19,717	22,653
Combined Forecast	992,245	28,397	19,717	944,131

2.1.11 The combined forecast translates to land requirement as shown below.

**Table 2.2: Combined Requirement (Floorspace and Land)**

	Total	Office	Manufacturing / Industrial	Warehouse
Combined Forecast Floorspace (sq m)	992,245	28,397	19,717	944,131
Land Requirement (ha)	244 ha	3 ha	5 ha	236 ha

2.1.12 The Thurrock Employment Land Availability Assessment was published in December 2017. This report was commissioned by Thurrock Borough Council to identify and assess the availability and suitability of employment land across the borough now and in the future and considers this in the context of expected future economic growth within Thurrock and across the South Essex sub-region.

2.1.13 The report concluded that there was a base approximation of 652ha of potential employment land available within Thurrock to accommodate this future demand, which does not include the sites excluded from the assessment due to their characteristics or the mixed use nature of their proposals. The table below is an extract from the report showing the balance between Potential Site Supply and Projected Future Demand (Table 45).

**Table 2.3: Supply Demand Balance**

	Potential Sites Supply (ha)	Projected Future Demand Range (ha) – excluding windfall and churn allowance	Projected Future Demand based on combined scenario (ha) – including windfall and churn allowance
<b>B1a/b</b>	-	3	4
<b>B1a/b or B1c/B2</b>	-	-	-
<b>B1c/B2</b>	131.6	5 – 28	14
<b>B1c/B2 or B8</b>	65.4	-	
<b>B8</b>	445.1	6 – 236	241
<b>B1/B2/B8</b>	9.8	-	
<b>Total</b>	651.9	13 - 244	259

2.1.14 A new EDNA is being prepared alongside this ELAA which will look at a range of scenarios and be informed by the supply of available sites assessed in this ELAA. Both these pieces of technical work are to inform the preparation of the new Local Plan for Thurrock which will replace the existing Local Plan and its policies.

## **2.2 National Policy Context**

2.2.1 The most recent revision to the National Planning Policy Framework ('NPPF') took effect from 2021. The NPPF sets out the Government's planning policies for England and how these should be applied.

2.2.2 Paragraph 81 of the NPPF states:

*“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. The approach taken should allow each area to build on its strengths, counter any weaknesses and address the challenges of the future. This is particularly important where Britain can be a global leader in driving innovation, and in areas with high levels of productivity, which should be able to capitalise on their performance and potential.”*



2.2.3 Paragraph 82(d) states that planning policies should be flexible so as to enable a rapid response to changes in economic circumstances:

*“Planning policies should 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.”*

2.2.4 Furthermore, paragraph 83 of the NPPF states:

*“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 storage and distribution operations at a variety of scales and in suitably accessible locations.”*

2.2.5 The National Planning Practice Guidance sets out the method for assessing housing and economic land availability.

2.2.6 This identifies that for land to be considered available, it should be suitable, available and achievable. It also notes that the assessment in itself does not determine if a site should be allocated for development or not. Paragraph: 001 Reference ID: 3-001-20190722:

*“An assessment of land availability identifies a future supply of land which is suitable, available and achievable for housing and economic development uses over the plan period. The assessment is an important source of evidence to inform plan-making and decision-taking, and the identification of a 5-year supply of housing land. It can also inform as well as make use of sites in brownfield registers.*

*However, the assessment does not in itself determine whether a site should be allocated for development. It is the role of the assessment to provide information on the range of sites which are available to meet the local authority’s (or, where relevant, elected Mayor or combined authority) requirements, but it is for the development plan itself to determine which of those sites are the most suitable to meet those requirements.”*

2.2.7 This paragraph also states that an assessment should:

- *Identify sites and broad locations with potential for development;*

- *Assess their development potential; and*
- *Assess their suitability for development and the likelihood of development coming forward (the availability and achievability).*

2.2.8 The guidance states that the suitability, availability and achievability of sites should be assessed to determine if the site is deliverable within the next five years. Paragraph: 017 Reference ID: 3-017-20190722:

*“Plan-makers will need to assess the suitability, availability and achievability of sites, including whether the site is economically viable. This will provide information on which a judgement can be made as to whether a site can be considered deliverable within the next five years, or developable over a longer period.”*

2.2.9 The Guidance sets out what factors should be considered when assessing the suitability of sites Paragraph: 018 Reference ID: 3-018-20190722:

*“A site or broad location can be considered suitable if it would provide an appropriate location for development when considered against relevant constraints and their potential to be mitigated.*

*When considering constraints, plan-makers may wish to consider the information collected as part of the initial site survey, as well as other relevant information, such as:*

- *national policy;*
- *appropriateness and likely market attractiveness for the type of development proposed;*
- *contribution to regeneration priority areas;*
- *potential impacts including the effect upon landscapes including landscape features, nature and heritage conservation;*
- *Plan-makers need to assess the suitability of identified sites or broad locations for different forms of development where appropriate, taking into account the range of needs for housing, economic and other uses [...].*

*Sites in existing development plans or with planning permission can generally be considered suitable for development although it may be necessary to assess whether circumstances have changed which would alter their suitability. This can be informed by a range of factors including the suitability of the land for different uses and by market signals, which will be useful in identifying the most appropriate use.”*

- 2.2.10 The following factors should be considered when assessing the availability of sites, Paragraph: 019 Reference ID: 3-019-20190722:

*“A site can be considered available for development, when, on the best information available (confirmed by the call for sites and information from land owners and legal searches where appropriate), there is confidence that there are no legal or ownership impediments to development. For example, land controlled by a developer or landowner who has expressed an intention to develop may be considered available.*

*The existence of planning permission can be a good indication of the availability of sites. Sites meeting the definition of deliverable should be considered available unless evidence indicates otherwise. Sites without permission can be considered available within the first five years, further guidance to this is contained in the 5-year housing land supply guidance. Consideration can also be given to the delivery record of the developers or landowners putting forward sites, and whether the planning background of a site shows a history of unimplemented permissions.”*

- 2.2.11 The guidance also identifies what factors should be considered when assessing the achievability of sites (Paragraph: 020 Reference ID: 3-020-20190722):

*“A site is considered achievable for development where there is a reasonable prospect that the particular type of development will be developed on the site at a particular point in time. This is essentially a judgement about the economic viability of a site, and the capacity of the developer to complete and let or sell the development over a certain period.”*

- 2.2.12 In undertaking the ELAA it is also necessary to take account of the new Town and Country Planning (Use Classes) (Amendment) (England) Regulations 2020. These change the use class of offices, research & development and light industrial processes from B1 to the new Use Class E which also encompasses shops, financial & professional services, restaurants & cafes, clinics & health centres, gyms and indoor sports & recreation uses. The effect is that planning consent is no longer required for changes of use within class E, giving businesses greater freedom to adapt to changing circumstances and to respond more quickly to the needs of their communities.
- 2.2.13 In theory, a business requiring office space could now move into a broader range of premises without needing planning consent. How this plays out in local property markets will depend on demand for premises relative to the supply of those premises. In areas of strong growth, businesses requiring offices

may be squeezed out by other E class businesses, that can afford to pay more. But more typically, in town centres suffering from high levels of vacant, the new use class will reduce barriers to reusing units as offices or other former B1 uses.

- 2.2.14 Industrial uses within use class B2 have remained the same, but can now be located in a residential area if the operations can be carried out without detriment to the amenity of that area. B8 uses are unchanged.

### **2.3 Summary**

- 2.3.1 The adopted Local Plan for Thurrock safeguarded existing primary and secondary industrial and commercial land and identified new primary and secondary industrial and commercial sites to provide 372 hectares of land for employment and 75.4 hectares for mixed-use across the borough for the 15 year period 2009-2026. Employment scenarios for Thurrock prepared as part of the 2017 South Essex EDNA have forecast a requirement of 244 hectares for the 20 year period 2016-2036. A new Local Plan is being prepared which will be informed by this ELAA and a new EDNA. It will set out new policies on employment growth and the safeguarding of existing employment areas.

- 2.3.2 National Planning Practice Guidance sets out the method for assessing economic land availability, noting that for land to be considered available it should be suitable, available and achievable. The assessment of available land should consider quality and quantity to determine whether sites are deliverable within the next five years, whilst also ensuring a supply that is sufficient for the plan period.

## 3.0 COMMERCIAL PROPERTY MARKET REVIEW

### 3.1 Data Sources

- 3.1.1 This section compares the market for employment premises in Thurrock with neighbouring local authority areas and the wider sub-region, through analysis of the stock, availability and demand of office and industrial premises. In preparing this report LSH has relied upon various data sources. The Non-Domestic Rating Business Floorspace statistics are used to compare the stock of employment premises within Thurrock with that of other local authority areas. This broad brush data, derived from Valuation Office Agency (VOA) data as at March 2021, uses 'bulk' use classes and figures are rounded. Whilst appropriate for comparing the stock at local authority level, it is insufficiently fine grained to allow analysis of the stock of premises within a local authority. To carry out more detailed analysis of the stock by market area and size band and to bring it up to date, LSH has used Analyse software to collate and analyse current VOA data.
- 3.1.2 In setting out a baseline understanding of recent market activity across Thurrock, LSH has drawn upon a range of data sources (including Co-star, EGI Radius and Promis), proprietary LSH data and market intelligence, including consultation with other agents active in the regional market. Data referred to in this report was collated in July 2022.

### 3.2 Macro Market Factors

- 3.2.1 2021 Census data identifies that the unitary authority of Thurrock has a population of around 176,000, having increased by 11.6% over the previous decade from around 157,700 in 2011. The population has become more ethnically diverse over this period. Compared to national and regional averages, Thurrock has a higher proportion of children aged up to 4 years and of adults of between 30 and 44 years old, but a smaller proportion of people aged 65 and over.
- 3.2.2 Thurrock's larger towns are Corringham, Grays, Purfleet-on-Thames, Stanford-le-Hope and Tilbury, which are situated in the more urbanised south of the borough. Some 70% of Thurrock is greenbelt; in the northern part of the borough are rural villages such as Bulphan and Orsett.
- 3.2.3 The ONS estimates that the Gross Domestic Product (GDP) of Thurrock was worth an estimated £5 billion in 2019, having grown 2.6% between 2018 and 2019. Thurrock is a key industrial and logistic location within the eastern and Essex regions. With three ports and excellent transport links, it has become a distribution hub for London and the wider area. In 2019, the transport and storage industry sector accounted for 21.9% of turnover and employed 16% of Thurrock's workforce, making it the largest sector

in Thurrock. Since 2019, high levels of development activity in this sector are evidence of further growth and its increasing importance to the local economy.

3.2.4 Data from the Valuation Office Agency identifies that office floorspace is less than 5% of employment floorspace in Thurrock. There are 79,000 sq m of offices compared to 1,658,000 sq m of factories, workshop and warehouses. As a key purpose of this ELAA is to ensure that there is sufficient land for employment purposes over the period of the Local Plan, this report inevitably focusses more heavily on the industrial and logistics markets.

### 3.3 The Office Market

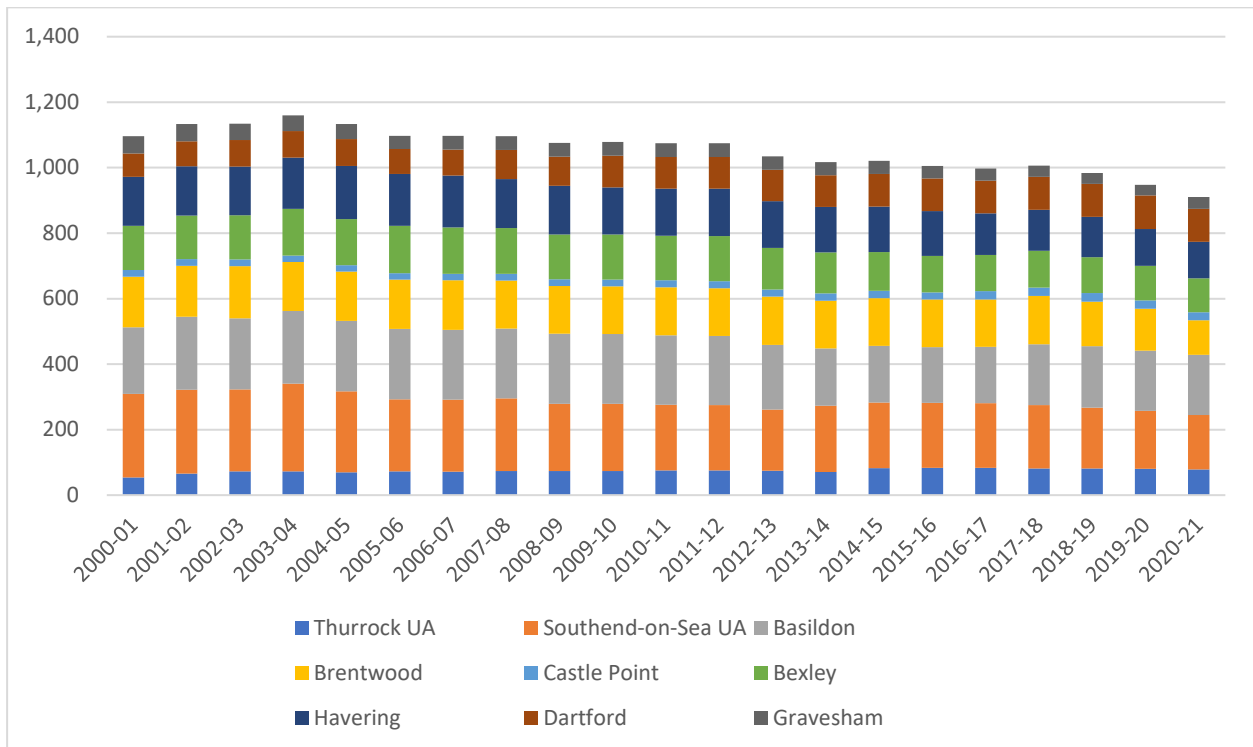
3.3.1 In the table below we compare the office stock in Thurrock with other local authorities within the surrounding area. Of the nine local authority areas listed Thurrock has the third smallest office stock when measured by either number of units or floorspace, with 470 offices providing 79,000 sq m of floorspace. However, the average size of offices in Thurrock is relatively large.

**Table 3.1: Office Units and Floorspace, March 2021**

Local Authority	County	Floorspace (sq m)	Units	Average (sq m)
Thurrock UA	Essex	79,000	470	168
Southend-on-Sea UA	Essex	166,000	840	198
Basildon	Essex	184,000	860	214
Brentwood	Essex	105,000	650	162
Castle Point	Essex	25,000	200	125
Bexley	Outer London	103,000	480	215
Havering	Outer London	112,000	850	132
Dartford	Kent	100,000	680	147
Gravesham	Kent	36,000	310	116

3.3.2 The local authority areas of Basildon and Southend-on-Sea are stronger office locations with more than twice as much office floorspace than Thurrock. The bar chart below compares the change in office floorspace over the last two decades. Whilst in Thurrock and Dartford office floorspace has typically increased over this period, in the other local authority areas and in the sub-region as a whole the amount of office floorspace has been declining since 2004.

Chart 3.1: Office Floorspace 2001 – 2021



3.3.3 The current Rating List provides a comprehensive and up-to-date list of all commercial premises for rating purposes. We have used Analyse software which allows disaggregation of the VOA data to analyse the current quantity and size of office premises within the Borough. This data, updated monthly, identifies 457 office units in Thurrock totalling 74,277 sq m (799,511 sq ft), suggesting that there has been a modest reduction in the office stock since March 2021. The table below uses postcode districts to assess their distribution across the borough.

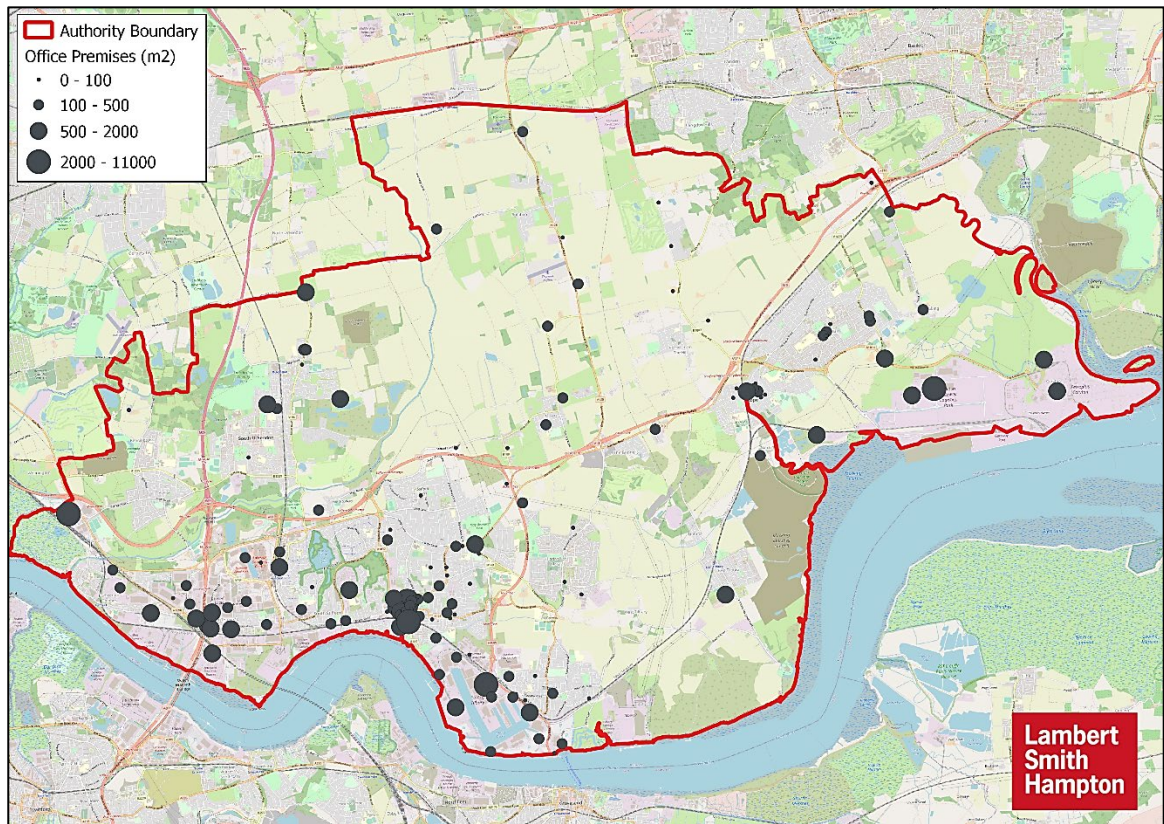
Table 3.2: Distribution of Office Units in Thurrock

Towns	Postcode District	Units	Percentage
West Horndon	CM13	3	1%
Bulphan and the rural north	RM14	5	1%
South Ockendon & Aveley	RM15	45	10%
Chafford Hundred, Orsett & Chadwell St Mary	RM16	48	11%
Grays	RM17	157	34%
Tilbury & East Tilbury	RM18	96	21%
Purfleet on Thames	RM19	15	3%
West Thurrock	RM20	23	5%
Horndon on the Hill	SS16	1	0%
<b>Stanford-Le-Hope</b>	<b>SS17</b>	<b>64</b>	<b>14%</b>
<b>Total</b>		<b>457</b>	<b>100%</b>

3.3.4 The distribution of offices throughout Thurrock is illustrated on the map below. This shows the amount of floorspace at a specific postcode, rather than individual office premises. Grays (postcode district RM17) is the dominant office location with a third of all office units and 39% of office floorspace. This includes the Council offices at New Road, the largest office building in Thurrock, and the Thameside complex and civic offices on Orsett Road which effectively anchor the southern and northern ends of this office quarter. In between, along Orsett Road, Derby Road, High Street and George Street are buildings providing office space in a wide range of unit sizes and of varied specification, including serviced offices at the Old Courthouse. Not all of Grays' office stock is in the town centre, some is in industrial areas, such as Askew and Globe Industrial Estates.



Figure 3.1: Distribution of Offices in Thurrock



3.3.5 Tilbury (RM18) accounts for 21% of office units, with concentrations at the docks and serviced office suites at the Riverside Business Centre, Tilbury Riverside Arts Centre and, at East Tilbury, the Big Enterprise Centre. Other notable office locations within the borough are Stanford-Le-Hope with 64 office units (14%) and South Ockendon 45 (10%).

Table 3.3: Size of Offices in Thurrock

	Size (sq m)								TOTAL
	< 50	50 - 100	100 - 250	250 - 500	500 - 1000	1000 - 2000	2000 - 5000	> 5000	
<b>Stock of office units</b>	224	102	77	28	15	7	2	2	457
<b>Percentage</b>	49%	22%	17%	6%	3%	2%	0%	0%	100%

3.3.6 Demand for offices in Thurrock is largely from small local businesses. Nearly half (224 units, 49%) of the office units are less than 50 sq m, and a further 102 (22%) are between 50 and 100 sq m. At the other end

of the scale just 26 (5%) of the office units are over 500 sq m, with the civic centre of 10,407 sq m representing 14% of overall office floorspace.

3.3.7 We have sourced data on currently available office premises from EGi and Co-Star, national commercial property databases. This is summarised in the table below.

**Table 3.4: Available Offices in Thurrock**

	Size (sq m)								TOTAL
	< 50	50 - 100	100 - 250	250 - 500	500 - 1000	1000 - 2000	2000 - 5000	> 5000	
<b>Stock of office units</b>	224	102	77	28	15	7	2	2	457
<b>Vacant office units</b>	14	10	9	4	3	0	0	0	40
<b>Vacancy rate</b>	6.3%	9.8%	11.7%	14.3%	20.0%	0%	0%	0%	8.8%

3.3.8 Some 40 office units are currently on the market equating to 5,846 sq m. The distribution of these vacant offices aligns with the stock, with the largest cluster in Grays town centre, but others spread throughout the urban areas. The vacancies are in properties of varied age and specification. The overall vacancy rate equates to around 8.8% of units; 7.9% of floorspace. In a healthy property market, a vacancy rate of 5% to 10% allows for market churn to accommodate the changing floorspace requirements of businesses, but does not leave high volumes of floorspace on the market for prolonged periods. The current vacancy rate of 8.8% indicates a healthy office market, but there is some variation within different size bands. Amongst units of 250 to 1,000 sq m the higher vacancy rates suggest weaker demand, supporting the view that market demand is predominantly from small local businesses.

3.3.9 The office stock is diverse, including older buildings in town centres and on industrial estates, more modern business park accommodation and bespoke buildings for specific occupiers. Serviced office accommodation is provided in converted historic buildings at Grays and modern buildings at Tilbury.

3.3.10 Data from EGi identifies 31 office lettings, totalling 3,008 sq m, between January 2017 and February 2022, which equates to around 6 per annum. The lettings involved units ranging from 7 to 486 sq m. The number of lettings by size band are set out in the table below. Nearly half the lettings were of units of less than 50 sq m reflecting the proportion of small units in the market. The distribution of these lettings aligns with the stock, with a small cluster in Grays town centre and others spread across the urban areas. Lettings involved offices of varied age and specification. EGi also identifies sales of four office buildings

with vacant possession during this period. One of these is being converted to apartments, and two others were being marketed as having potential for conversion to residential use.

**Table 3.5: Office Lettings in Thurrock 2017-2022**

	Size (sq m)								TOTAL
	< 50	50 - 100	100 - 250	250 - 500	500 - 1000	1000 - 2000	2000 - 5000	> 5000	
<b>Office Lettings</b>	15	6	8	2	0	0	0	0	31
<b>Percentage</b>	48%	19%	26%	6%	0%	0%	0%	0%	100%

3.3.11 Prime office rents are in excess of £20 per sq ft (£215/sq m), which is sufficient to enable office development on serviced plots in out-of-town locations, but insufficient for viable town centre office development, where abnormal costs are typically higher. The viability of development is dependent on a range of factors including:

- availability and cost of finance,
- abnormal costs of site preparation
- abnormal infrastructure costs
- void periods
- construction costs
- rental levels
- yields
- ability to secure pre-lets or forward sales
- availability of gap funding

3.3.12 Thurrock's small office market and limited letting and sales activity substantially increase the risks of speculative development. As a consequence, speculative office development by the private sector is likely to require subsidy or some other form of public sector financial support. But with public sector funding increasingly targeted at strategic projects that meet key economic criteria rather than property development in its own right, gap funding for office development in Thurrock seems unlikely.

3.3.13 Analysis of past take-up of employment land also supports the view that speculative office development is unlikely. New offices to meet larger requirements have come forward as bespoke schemes for specific occupiers. Just as an office block was developed as part of the London Gateway scheme, so Freeport status could stimulate office development to accommodate services that support port related activities

such as customs or border forces. The specific locational requirements of individual occupiers make forward planning challenging, and we would not recommend allocating sites specifically for office development. Planning policies for ports, general employment areas and mixed-use sites should allow for the provision of offices.

3.3.14 As noted above Grays has the largest cluster of offices in Thurrock, with the Civic Centre accounting for 36% of floorspace within the town (as defined by the RM17 postcode district). Apart from the Council, Gray's office market is predominantly small units, with half less than 50 sq m and 89% less than 250 sq m. These smaller unit sizes are reasonably well occupied, and though there is no immediate pressure for more space, over the course of the plan period, population growth, town centre regeneration and other factors could stimulate additional demand for offices. The recent change to planning use classes now makes changes of use to offices easier, enabling additional premises through conversions. The Local Plan can support this by allocating sites for town centre uses to include offices; but there is insufficient evidence of demand to justify allocating sites specifically for office development.

3.3.15 The Council's upgrading of the civic centre complex has seen the relocation of staff from older offices on the corner of Sherfield Road and New Road to a new building on the corner of High Street. Opportunities to repurpose larger office units, including their division into smaller suites should be considered carefully.

### **3.4 The Industrial Market**

3.4.1 Thurrock benefits from strategically important infrastructure hubs including the M25 motorway and the Dartford Crossing in the western portion of the borough, with the A13 running from east to west across the borough from Southend to the City of London. Thurrock remains a key port location for the United Kingdom with the Thames Estuary forming the southern border of the borough. The borough also benefits from being included in the Thames Freeport area, with special tax status and business incentives in part of the borough.

3.4.2 The significance of this key infrastructure cannot be understated. The borough has three ports: Forth Ports Group London at Tilbury, C.Ro Ports at Purfleet and DP World's London Gateway. These ports have rail links and benefit from proximity to the M25, Dartford Crossing and A13 enabling easy access to Greater London, the wider South East and the national motorway network. Thurrock is a major hub within the national and regional logistics network for the UK. The borough also has an established process industry cluster that includes oil and gas processing and chemical manufacturing. These sectors operate within specialist markets, with their own drivers and influences, and are less influenced by general market conditions.

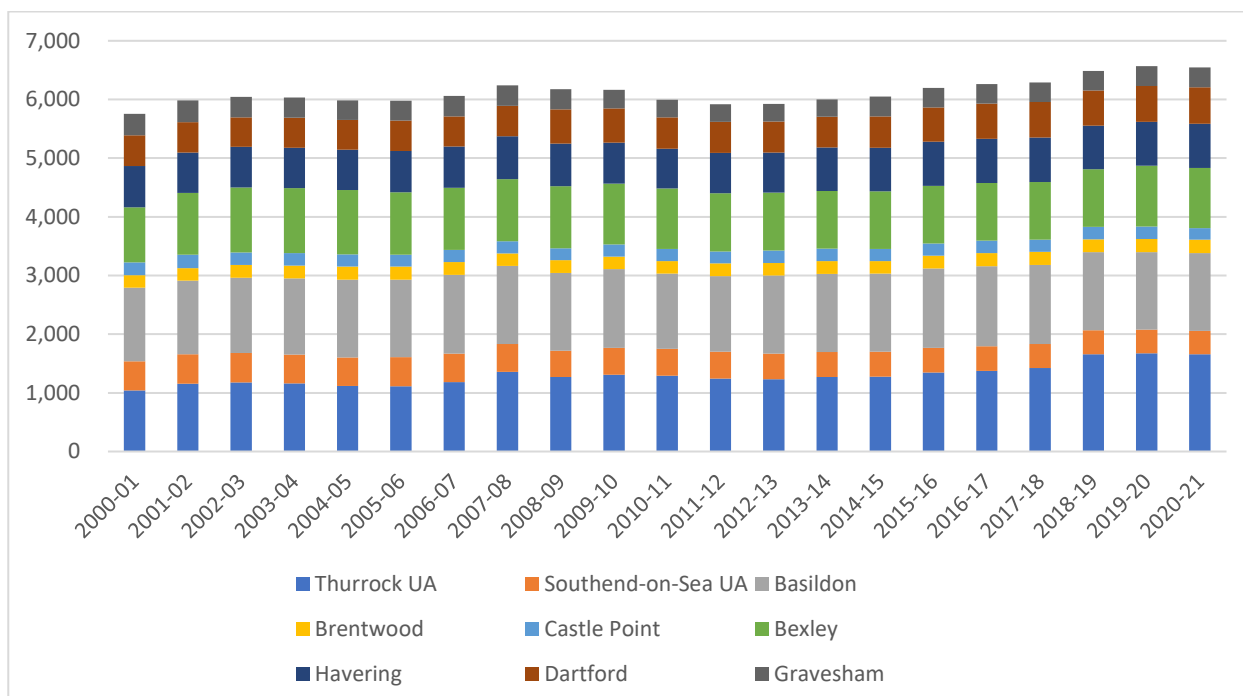
- 3.4.3 The Dartford Crossing provides a key road link between Essex and Kent, forms part of the M25 motorway network around London and is the only road link over the Thames east of London. A new crossing further east has been proposed by National Highways with a pair of new road tunnels between Gravesend in Kent and Tilbury, Essex. The Lower Thames Crossing (LTC) is designed to ease the congestion at the existing Dartford Crossing by providing a dual carriageway that links the A2/M2 on the Kent side and to the A13 and Junction 29 of the M25 in Essex. The current timetable for the LTC is for construction to commence in 2024 with completion projected to be 2030. A Development Consent Order application was submitted in October 2022 this was validated by the Planning Inspectorate in November 2022, with the date for the Examination to be set in due course. Assuming the LTC scheme progresses as envisioned, then it is expected to provide additional road capacity in the borough towards the end of the Local Plan period.
- 3.4.4 Thames Freeport is a recently established Freeport area within the borough that links a number of sites in the east London/South Essex areas. The Thames Freeport includes the Ford engine plant in Dagenham and land at London Gateway and Tilbury. The concept of the Freeport area is a creation of a geographical economic zone that benefits from financial incentives for certain industries that are established in the area. The proposed incentives include Stamp Duty Land Tax Relief, Enhanced Structures and Buildings Allowance, enhanced Capital Allowances, Employer National Insurance Contributions Rate Relief, Business Rates Relief and Local Retention of Business Rates.
- 3.4.5 Port and logistics operations dominate the market for employment premises in Thurrock and stakeholders note that there is a limited market for manufacturing premises when compared to the neighbouring borough of Basildon. There are however local businesses supplying goods and services to other businesses and to the local population. These local businesses are typically situated on industrial estates away from the riverside.
- 3.4.6 In the table below we compare the industrial stock in Thurrock with other local authorities within the surrounding area. This data does not distinguish between manufacturing and logistics uses. Of the nine local authority areas listed, Thurrock has the greatest industrial floorspace and the second highest number of industrial units after Basildon, with 1,650 units providing 1,658,000 sq m of floorspace. Thurrock has twenty times more industrial floorspace than office and also has the largest average unit size of 1,005 sq m amongst these surrounding authorities, reflecting the importance of logistics and distribution to the Borough.

**Table 3.6: Industrial Units and Floorspace, March 2021**

Local Authority	County	Floorspace (sq m)	Units	Average (sq m)
Thurrock UA	Essex	1,658,000	1650	1005
Southend-on-Sea UA	Essex	396,000	1150	344
Basildon	Essex	1,326,000	1970	673
Brentwood	Essex	229,000	630	363
Castle Point	Essex	200,000	690	290
Bexley	Outer London	1,025,000	1540	666
Havering	Outer London	751,000	1520	494
Dartford	Kent	625,000	720	868
Gravesham	Kent	335,000	550	609

3.4.7 The bar chart below compares the change in industrial floorspace over the last two decades. Prior to the financial crisis and recession of 2008-09 the amount of industrial floorspace had steadily increased, but then it declined as the recession was followed by ‘austerity’ and very weak economic growth. From 2013 the market has improved and the amount of industrial floorspace in both Thurrock and the wider sub-region has increased steadily to peak in 2000 before decreasing slightly in 2021.

**Chart 3.2: Industrial Floorspace 2001-2021**



3.4.8 The current Rating List which provides a comprehensive and up-to-date list of all commercial premises for rating purposes, distinguishes between various types of industrial premises. Our analysis includes these descriptions and use codes for reference but to a large extent the market does not make such distinctions. Buildings can accommodate a range of uses, and what was originally designed for one use may subsequently be used for another. Even broad groupings such as factories and warehouses can typically be indistinguishable. Whilst large purpose-built high bay warehouses with multiple loading bays can be distinguished, these are too few to allow meaningful analysis.

3.4.9 From VOA data complemented by LSH research, it is estimated that there are some 1,651 industrial premises in Thurrock. These are predominantly situated on industrial estates and within other established industrial areas, though vehicle repair workshops and stores are found in other locations too. Premises defined as land used for storage or storage depots are included within this part of the analysis. The table below categorises these by type. The descriptions and categorisation used by the VOA suggest that around 43% of premises are used for manufacturing type uses and 57% for storage and logistics uses.

**Table 3.7: Stock of Industrial Units in Thurrock**

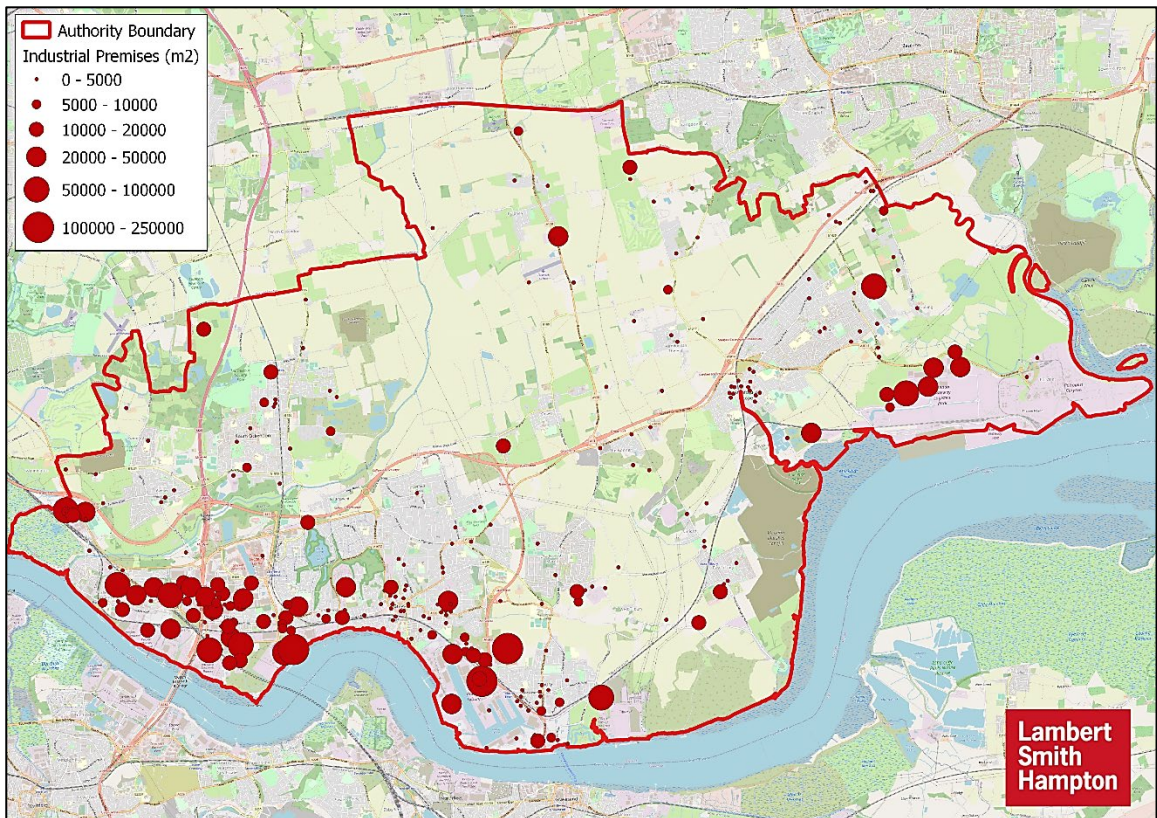
Code	Description	Count	Percentage
CG1	Vehicle Repair Workshop and Premises	18	1.1%
CG2	Garage and Premises	6	0.3%
CG4	Road Haulage Depot and Premises	19	1.2%
CW	Warehouse And Premises	461	27.9%
CW1	Land Used for Storage and Premises	294	17.8%
CW2	Storage Depot and Premises	6	0.3%
CW3	Store and Premises	145	8.8%
IF	Factory and Premises	63	3.8%
IF2	Works and Premises	1	0.1%
IF3	Workshop and Premises	595	36.0%
IF4	Business Unit and Premises	30	1.8%
IX	Other Industrial	13	0.8%
<b>Total</b>		<b>1651</b>	<b>100%</b>

3.4.10 The distribution of industrial premises by postcode area within the borough is shown in the table and on the map below. The stock is concentrated within established employment areas along the riverside and around strategic port and highway links. The postcode districts that encompass the riverside areas (RM17, RM18, RM19, RM20 and SS17) comprise 70% of the stock. Somewhat surprisingly 11% of premises are spread across the rural northern part of the borough (RM14, CM13 & SS16), with notable clusters of premises at Middleton Hall, Baldwins Farm, Little Malgraves and Wick Place industrial estates.

Table 3.8: Distribution of Industrial Units in Thurrock

Towns	Post Code	Number of	Percentage
West Horndon	CM13	22	1.3%
Bulphan and the rural north	RM14	153	9.3%
South Ockendon & Aveley	RM15	172	10.4%
Chafford Hundred, Orsett & Chadwell St Mary	RM16	144	8.7%
Grays	RM17	222	12.8%
Tilbury & East Tilbury	RM18	313	19.0%
Purfleet on Thames	RM19	88	5.3%
West Thurrock	RM20	322	19.5%
Horndon on the Hill	SS16	8	0.5%
Stanford-Le-Hope	SS17	207	12.5%
<b>Total</b>		<b>1,651</b>	<b>100%</b>

Figure 3.2: Distribution and Scale of Industrial Premises by Postcode

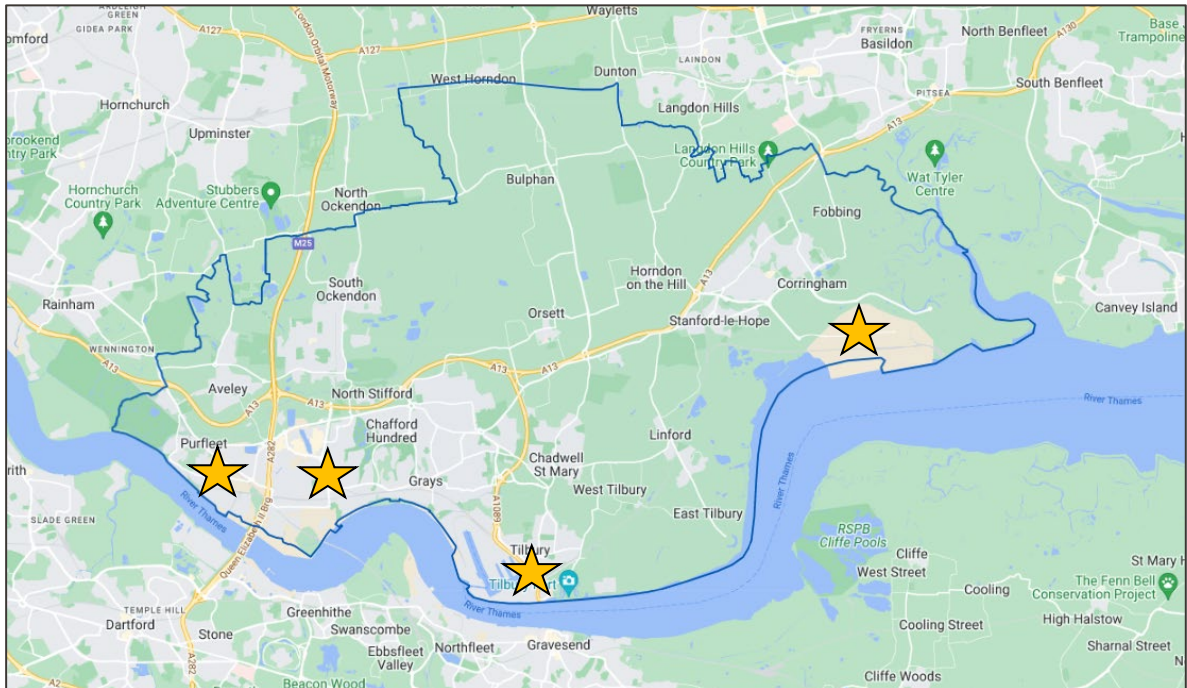




3.4.11 Whilst there are separate settlements within Thurrock, there isn't necessarily a distinct market for each worthy of granular analysis. Four key locations within the borough are:

- Purfleet on Thames – in the south west corner of the borough with the A13 to the north and the M25 to the east, Purfleet has excellent connections to the strategic highway network. Recent development has included warehouses for Tesco, DHL, Ocado, Carpetright and Goodman. Along the riverside the building stock is older and of poorer quality. Here there are specialist uses including terminals for containers, oil, and aggregates. To the west of these a large area of land stretching from the riverside to the Purfleet bypass is identified for mixed use regeneration.
- Grays and West Thurrock – the commercial area to the east of the M25 and to the south of the A13 accommodates a mix of industrial, warehouse and distribution uses. Along the river are oil and gas processing businesses and chemical complexes with their own jetties and wharves. To the north-west next to junction 30 of the M25 are modern industrial estates adjoining the retail park cluster beside the Lakeside Shopping Centre. To the north of Grays town centre are the older industrial estates of Askew Farm, Titan Works and Globe industrial estate. The first two of these once dominated by process industries are being redeveloped for general industrial and warehousing, with stock of varied specification.
- Tilbury – downstream from Grays is the port of Tilbury and associated warehousing and industrial premises. The commercial activity in this area is largely within the geographical area bounded by the river, port, A1089 and railway. The port of Tilbury has expanded eastwards with the development of Tilbury 2 and now wraps around the historic Tilbury Fort. To the north is a new Amazon warehouse and a new factory for Tevva.
- Stanford-le-Hope (London Gateway) – at the eastern end of the borough London Gateway has been the focus of large scale logistics development. The port opened in 2015 on the former Shell Haven refinery site and benefits from a rail terminal and adjoining logistics park. On land to the east additional oil refinery land is being cleared and marketed as the Thames Enterprise Park.

Figure 3.3: Key Industrial Locations in Thurrock



3.4.12 The table below categorises industrial premises by unit size. For this part of the analysis we have excluded land used for storage (CG4, CW1, CW2 & IX) to ensure that the analysis is not distorted by the inclusion of large areas of land. There are 1,319 industrial units totalling 1,816,598 sq m (19.5 million sq ft). Despite the high profile given to the market for larger units, more than half of all units (57%) are less than 250 sq m, and only 16% of units are greater than 1,000 sq m; this is evidence of the important role of SMEs in Thurrock’s economy. Warehouses comprise 35% of all units but 73% of floorspace, and account for 70% of units over 1,000 sq m.

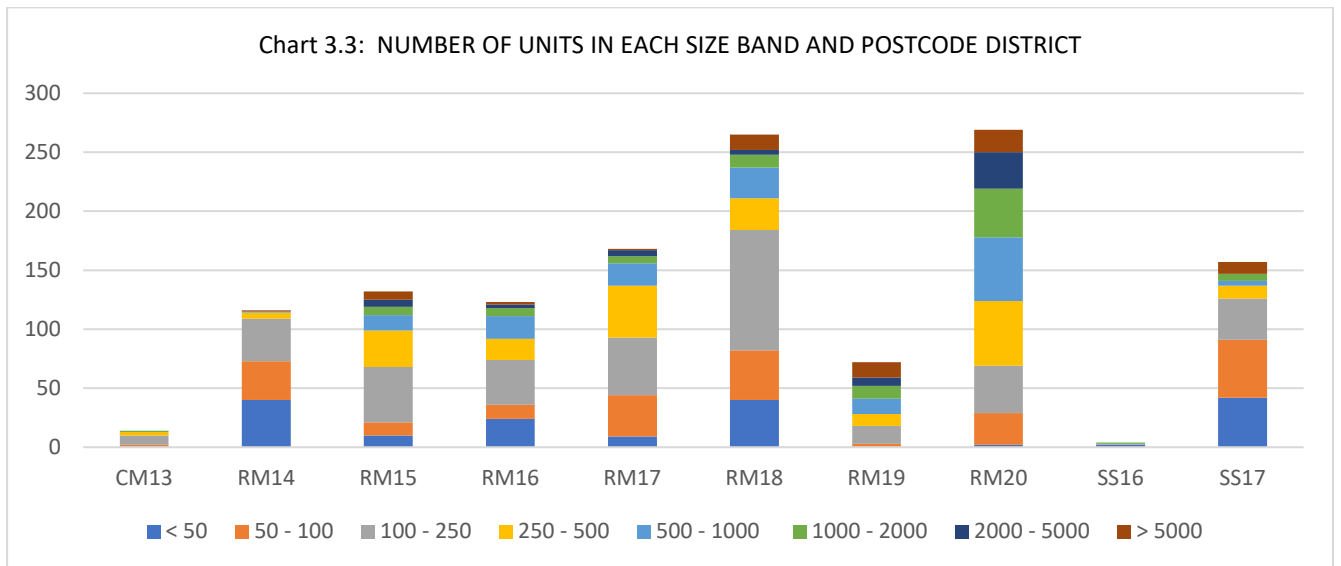
**Table 3.9: Size of Industrial Units in Thurrock**

Code	Descriptions	Size (sqm)							
		< 50	50 - 100	100 - 250	250 - 500	500 - 1000	1000 - 2000	2000 - 5000	> 5000
CG1	Vehicle Repair Workshop and Premises	1	1	7	5	3	0	1	0
CG2	Garage and Premises	0	0	2	1	0	2	0	1
CW	Warehouse and Premises	8	23	112	84	85	49	46	54
CW3	Store and Premises	82	31	21	3	6	1	1	0
IF	Factory and Premises	3	6	16	9	8	10	2	9
IF2	Works and Premises	0	0	0	0	0	0	0	1
IF3	Workshop and Premises	63	144	205	101	46	29	6	1
IF4	Business and Premises	12	9	8	1	0	0	0	0
	<b>TOTAL</b>	169	214	371	204	148	91	56	66
	<b>PROPORTION OF STOCK</b>	12.8%	16.2%	28.1%	15.5%	11.2%	6.9%	4.2%	5.0%

3.4.13 The table and bar chart below compare the number of premises in each size band within different geographic areas. Again, this analysis excludes land used for storage (CG4, CW1, CW2 & IX) to ensure that the analysis is not distorted by the inclusion of large areas of land. In rural parts of Thurrock the stock is dominated by smaller units, whereas in Purfleet and West Thurrock (RM19 & RM20) larger units make up a higher proportion of the stock. Through this analysis the recent development activity at London Gateway is set in a broader context; even within and around Stanford-le-Hope (SS17) 80% of units are of less than 250 sq m; and only 15% of units within the largest size band (> 5,000 sq m) are located here, lower than the number in Tilbury, Purfleet or West Thurrock (RM18, RM19 & RM20).

**Table 3.10: Number of Units in Each Size Band and Location**

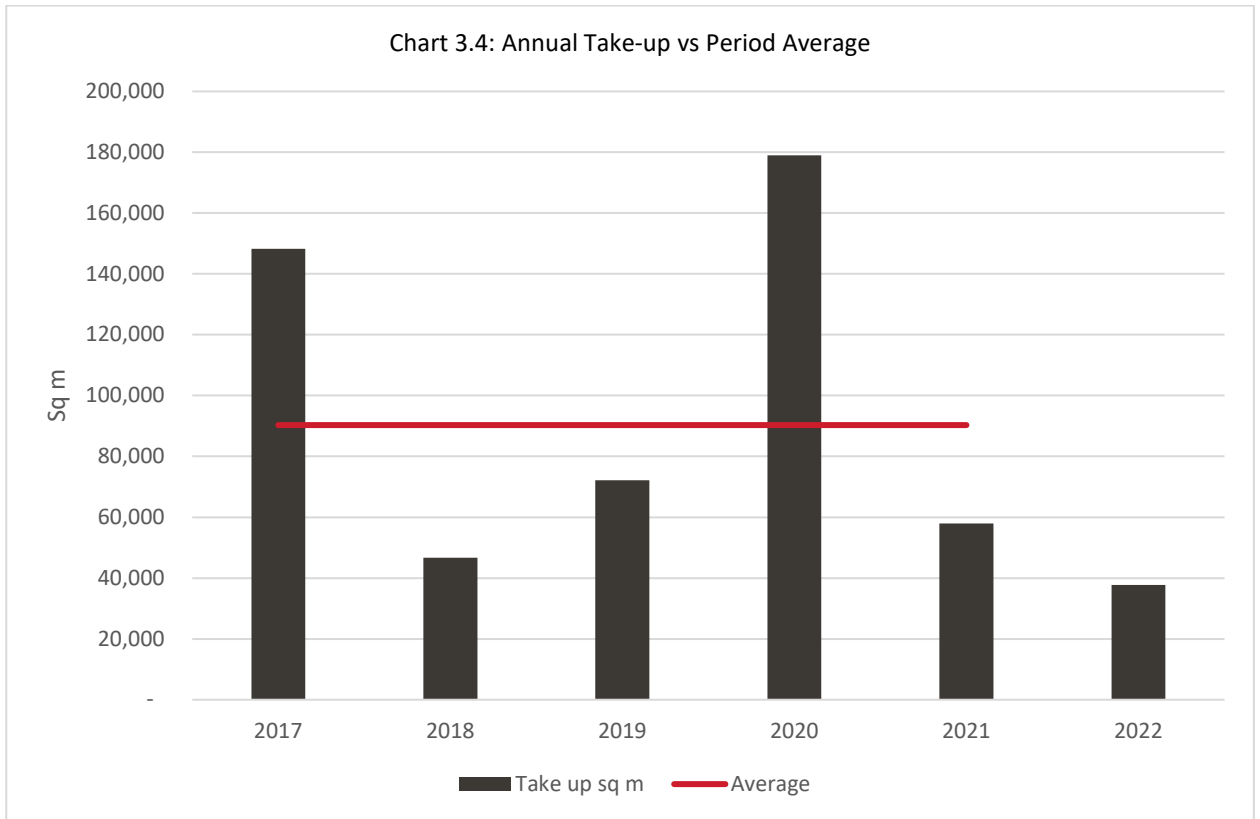
Towns	Post Code	< 50	50 - 100	100 - 250	250 - 500	500 - 1000	1000 - 2000	2000 - 5000	> 5000	TOTAL
West Horndon	CM13	0	2	8	3	0	1	0	0	14
Bulphan and the rural north	RM14	40	33	36	5	1	0	0	1	116
South Ockendon & Aveley	RM15	10	11	47	31	13	7	6	7	132
Chafford Hundred, Orsett & Chadwell St Mary	RM16	24	12	38	18	19	7	3	2	123
Grays	RM17	9	35	49	44	19	6	5	1	168
Tilbury & East Tilbury	RM18	40	42	102	27	26	11	4	13	265
Purfleet on Thames	RM19	0	3	15	10	13	11	7	13	72
West Thurrock	RM20	2	27	40	55	54	41	31	19	269
Horndon on the Hill	SS16	2	0	1	0	0	1	0	0	4
Stanford-Le-Hope	SS17	42	49	35	11	4	6	0	10	157
<b>Total</b>		<b>169</b>	<b>214</b>	<b>371</b>	<b>204</b>	<b>149</b>	<b>91</b>	<b>56</b>	<b>66</b>	<b>1320</b>



3.4.14 The quality and age of industrial stock varies widely across the borough and even within individual industrial estates. Many estates have a long history and have seen redevelopment. The quality and age of buildings within each existing employment area are summarised in the matrix at Appendix 2.

### 3.5 Industrial Transactions

3.5.1 Analysis of the take-up of industrial and warehouse premises within the borough identifies average annual take-up of 1.085m sq ft per annum between 2017 – 2021. The borough’s average take-up fluctuates year to year, with some years the take-up is in excess of 1.5m sq ft (2017) and in 2020 the take-up was nearly 2m sq ft. This can be explained by the nature of the transactions that tend to take place, with port centric built to suit transactions tending to dominate the total figures. Over this six year period, transactions at London Gateway account for 50% of industrial floorspace transacted.



Source: LSH

3.5.2 Occupiers at the London Gateway logistics park have tended to have larger requirements; such very large warehouses tend not to be constructed on a speculative basis. The average size of built to suit (BTS) transactions has been over 20,000 sq m. Additionally, some occupiers have chosen London Gateway for its ability to deliver bespoke design requirements incorporated into their new facilities and/or to reserve expansion land giving them the ability to add additional warehouse space at a later date.

**Table 3.11: Types of Transactions – Units and Floorspace**

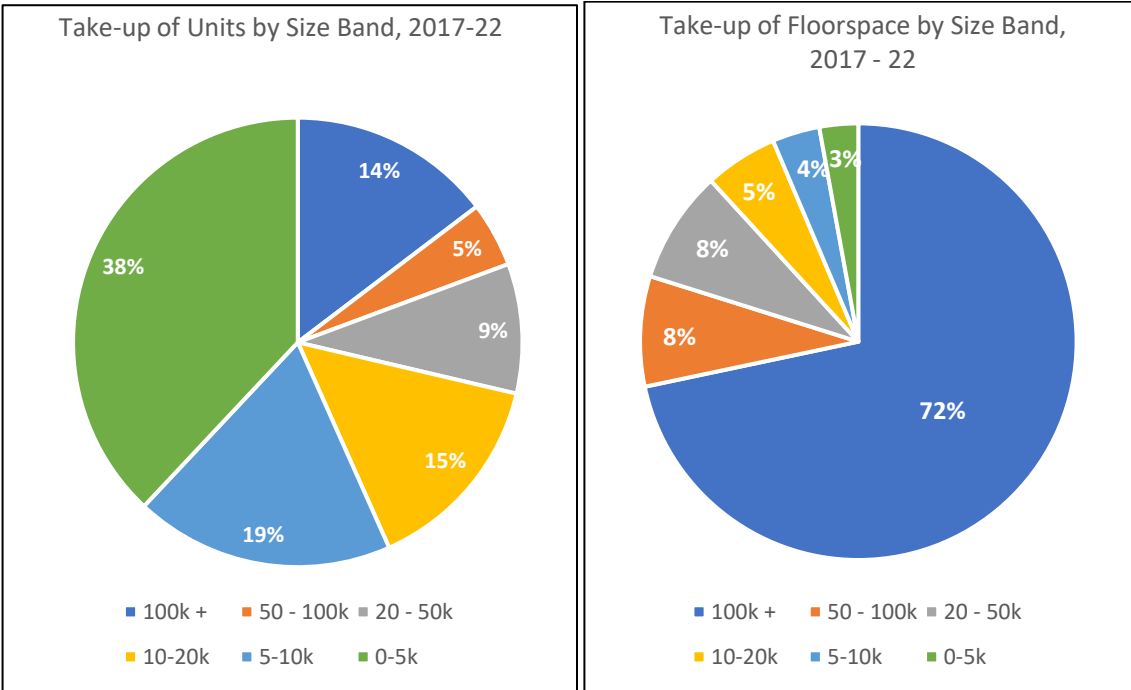
Type of Building	Floorspace (sq m)	No. of Transactions	Average Size (sq m)
Built to suit	248,786	10	24,878.62
Speculative development	91,793	14	6,556.67
Existing stock	201,196	126	1,596.79
<b>Total Take-up</b>	<b>541,776</b>	<b>150</b>	<b>3,611.84</b>

Source: LSH

3.5.3 More than 80% of industrial property transactions across Thurrock have involved second-hand premises. It should be noted that transactions of smaller properties may not get picked up by national property market databases, thus this figure may be conservative. The average size of second-hand premises transacted is 17,900 sq ft. Another 11% of transactions have been new speculative units notably Kier Developments Logistics City and Trade City, both in West Thurrock. The former is a development of four 'mid-box' (greater than 20,000 sq ft but smaller than 100,000 sq ft) warehouses; and the latter is a trade counter scheme providing units of less than 10,000 sq ft.

3.5.4 The pie graphs below compare take-up of industrial premises by size band, measured alternatively by number of units and by amount of floorspace. Market activity is dominated by smaller unit sizes; 38% of transactions involved units of less than 5,000 sq ft and 72% involved units of less than 20,000 sq ft. At the other end of the scale units of more than 100,000 sq ft have accounted for 14% of transactions when measured by number of units but 72% of all floorspace. These charts demonstrate the breadth of the market in Thurrock, where local, regional, national and international businesses all contribute to the local economy.

**Chart 3.5: Take-up of Industrial Properties by Size Band**

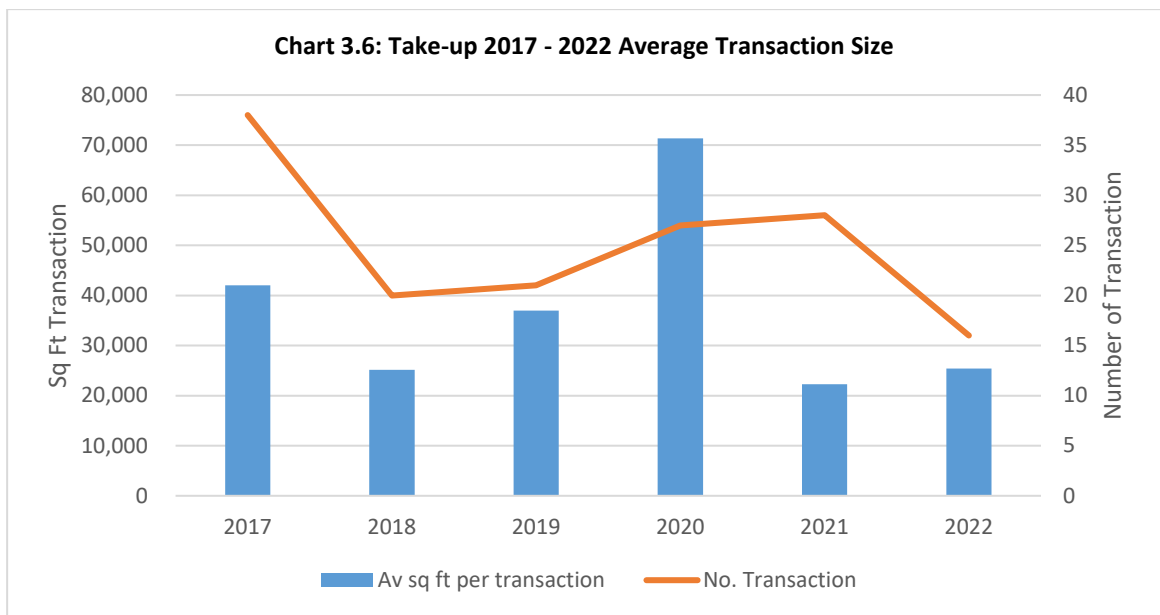


Source: LSH

3.5.5 Although transaction data provides examples of viable development throughout the borough the development process favours particular sites. The logistics park at London Gateway benefits from a local development order (LDO) which simplifies and speeds up the planning process for new relevant

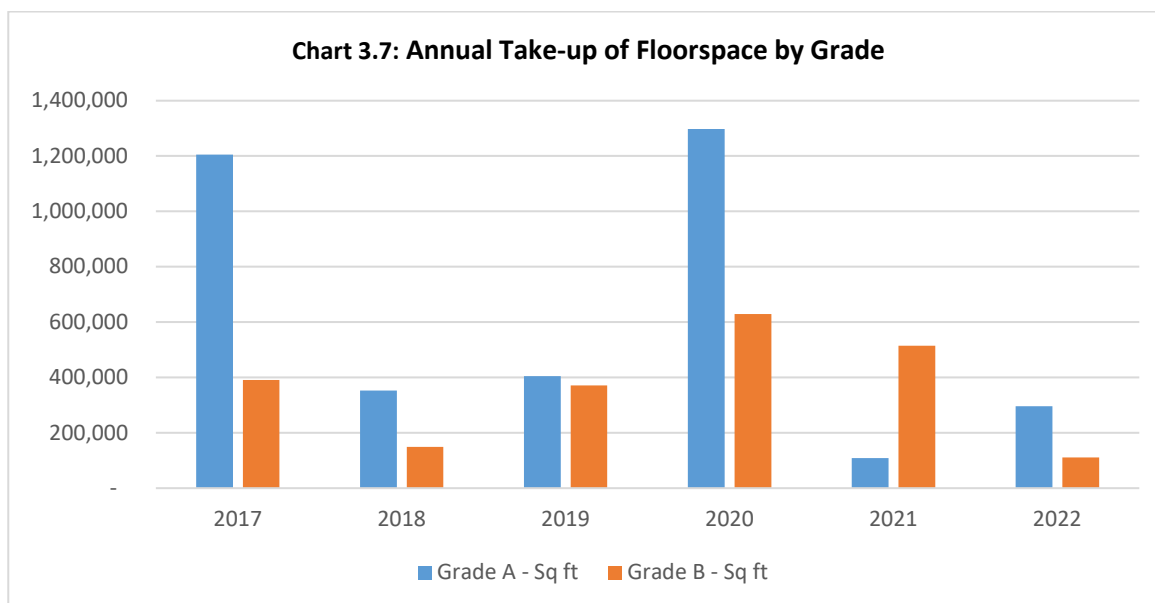
developments. The LDO is limited to the geographic envelope of the logistics park and grants planning permission so long as the application meets certain conditions. Where an application meets these then planning consent can be granted in a much reduced timescale. An example of this is the UPS development, which was reportedly granted planning consent after 17 days of the application being submitted.

3.5.6 The chart below shows the average transaction size (sq ft) along with the number of transactions in a particular year. This reinforces that 2020 was a strong year for take-up overall but also that the numbers and sizes of the transactions fluctuate over the review period.



Source: LSH

3.5.7 Comparing take-up of Grade A (i.e. newly constructed) and Grade B (second-hand) floorspace, reveals the scale of development at London Gateway and the transaction activity involving large logistics premises. In most years, transactions of Grade A have exceeded those of existing stock. Though when assessed as numbers of units Grade A stock accounts for only 19% of transactions.



Source: LSH

3.5.8 Transactions over the period 2017-22 are summarised at Appendix 9 and include the name of the occupier where known. They provide an insight into the sectors that are currently active in the market, their constraints and opportunities.

- Smaller units have been taken by a variety of local businesses as well as local branches of national businesses.
- Kier developed two adjacent schemes in 2017 that were aimed at the mid-box and trade counter markets. The majority of the Logistics City units were let on completion. The Trade City scheme was mainly let to national chains with local occupiers taking the balance of the scheme.
- London Gateway as a location dominates the larger size requirements with only the transaction to Ocado in South Ockendon featuring as an alternative site with a transaction in excess of 20,000 sq m.
- Also of note are Made.Com's two transactions at London Gateway as the business expanded rapidly before going into administration in November 2020.
- The Gousto move to Chillbox in Thurrock was to an existing chilled facility that had been refurbished. The only alternative in the borough would have been a BTS facility at London Gateway.
- Thurrock 162 was a speculatively developed warehouse that London City Bond acquired, the company has since expanded further onto the London Gateway site.
- Thurrock 111 has transacted twice; in 2017 transaction it was sold to Millennium Cash & Carry who used it sparingly and then sold it on (as prices rose in the market) to Kloenecker Metals.



- LDP6 in Tilbury forms part of London Distribution Park developed by Roxhill. The subject property was constructed for Travis Perkins for their regional distribution centre. This closed in 2020 and they let the bespoke, low density warehouse to Tevva Motors who were based in Chelmsford. Tevva Motors manufacture electric commercial vehicles and after proving the concept from small units in Chelmsford received venture capital funding to upscale. Thurrock was able to attract this inward investment as it could offer premises of sufficient size; the requirement was very large for the region and also time sensitive. Also of note is that London Distribution Park is home to a 200,000 sq m Amazon warehouse that was agreed in 2016.
- Amazon also took occupation in 2021 of Proxima 111 (formally marketed as GT110) primarily for van storage and electric charging. The unit itself had been marketed refurbished for over 4 years and struggled to let due to its inferior specification in regard to eaves height and yard space.
- The Co-op transaction at Tower Thurrock in 2017 represented the final transaction on the speculatively developed three-unit scheme that was completed in 2014. Other transactions were to Amazon (12,000 sq m) and Elliot Baxter & Co (4,600 sq m), which were outside of the study period.

### 3.6 Availability of Industrial and Warehouse Premises

3.6.1 Data from CoStar in July 2022 identifies 39 available units, ranging from 85 sq m to 1,033 sq m and totalling 17,781 sq m. Available units are compared to stock in the table below; again, it should be noted that some smaller units may not be captured by this database and the vacancy rates in the smaller size bands may be lower than actual. In addition to the currently available premises, CoStar lists five buildings with planning consent (3,069 to 35,958 sq m) and one unit of 31,890 sq m under construction. Four of the five with planning consent are at London Gateway where the LDO allows detailed planning consent to be granted quickly and accelerates the delivery of BTS warehouses. This will to a large extent compensate for the lack of currently available units in excess of 2,000 sq m.

**Table 3.12: Vacancy Rates by Size Band**

	Size (sq m)								TOTAL
	< 50	50 - 100	100 - 250	250 - 500	500 - 1000	1000 - 2000	2000 - 5000	> 5000	
<b>Stock of industrial units</b>	169	214	371	204	149	91	56	66	1320
<b>Vacant industrial units</b>	0	4	9	10	14	2	0	0	39
<b>Vacancy rate</b>	0%	1.9%	2.4%	4.9%	9.3%	2.2%	0%	0%	3.0%

3.6.2 In a healthy property market, a vacancy rate of 5% to 10% allows for market churn to accommodate the changing floorspace requirements of businesses but does not leave high volumes of floorspace on the market for prolonged periods. The current vacancy rate of 3% indicates a tight property market which could support additional development activity. The analysis above reveals that the majority of available units are between 250 and 1,000 sq m, but that amongst smaller and larger units the tight supply suggests that there is capacity for additional provision.

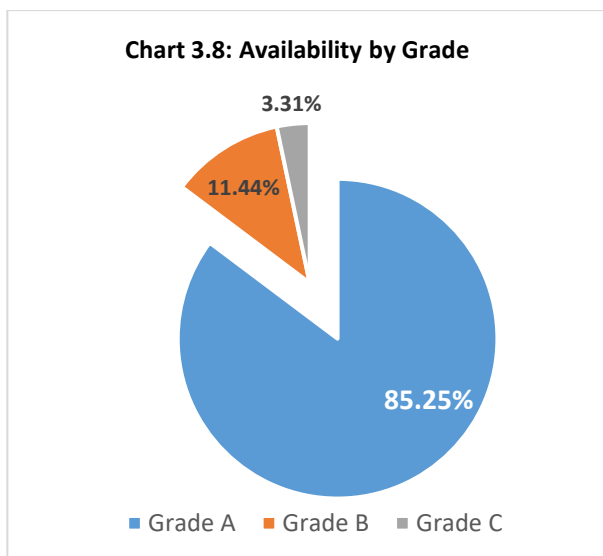
3.6.3 The current supply of industrial and warehouse premises is compared with the average annual take-up in the table below. Including those larger units with planning and under construction, current availability represents approximately 13 months of supply. Built to suit options will provide additional options for businesses with large requirements. Amongst units of less than 2,000 sq m, the market is slightly less constrained with the equivalent of 17 months' supply and with a choice of new and secondhand premises.

**Table 3.13: Assessment of Supply of Industrial and Warehouse Premises**

	Available (all)	Available (< 2000 sq m)
Currently available (sq m)	17,781	17,781
With planning / under construction (sq m)	89,314	0
Total (sq m)	107,095	17,781
Average Annual Take-up 2017-21 (sq m)	100,802	11,934
Months' supply	13	17

Source - LSH

3.6.4 As a consequence of the reliance on new build to provide available floorspace, the overwhelming majority of it is listed as Grade A as illustrated in the chart below.



Source - LSH

3.6.5 For businesses with larger requirements there is little choice; there are no completed units of more than 2,000 sq m available, and only two units of 1,000 sq m. New build options may not meet the requirements of businesses wanting more affordable premises. Moreover there are no buildings with planning or under construction between 5,000 and 10,000 sq m. Available units larger than 1,000 sq m are listed by size in the table below, with details of their size, quality and status.

**Table 3.14: Available Industrial Units in Thurrock (>1,000 sq m)**

Property Address	Property Name	Building Grade	Status	Available Space	
				Sq M	Sq Ft
London Gateway	LG387	A	Planning	35,958	387,064
Arterial Rd	Purfleet Commercial Park	A	Under Construction	31,891	343,281
726 London Road	Valor Park Thurrock	A	Planning	11,258	121,179
London Gateway	LG43 (The Campus)	A	Planning	4,070	43,808
London Gateway	LG33A (The Campus)	A	Planning	3,069	33,034
London Gateway	LG33B (The Campus)	A	Planning	3,069	33,034
Dolphin Way	Unit B Neptune Business Park	B	Existing	1,033	11,122
Oliver Rd, W Thurrock	Units 11-12, Thurrock Trade Park	B	Existing	1,016	10,939

3.6.6 From this more detailed look at the larger available units the following points are noted.

- All units above 1,500 sq m are warehouses that are either under construction or are to be speculatively developed.
- There is only one building between 5,000 and 30,000 sq m with Valor Park’s proposed development on the former Transmec site in Thurrock (after Transmec moved to London Gateway).
- The first speculative mid-box units are under construction at London Gateway within a terrace of three units known as The Campus. The scheme could be taken as a single unit or in combination for flexible size requirements. This is in addition to the speculatively constructed LG387 at London Gateway.
- Under construction and close to completion, is Goodman’s Purfleet Commercial Park; at 31,890 sq m it is one of the largest available warehouses in the South East of England.
- With two assets of a similar size (above 30,000 sq m) and three mid-box warehouses there is little variety amongst the larger units available to the market.

3.6.7 In addition to the available premises, schemes in the pipeline include:

- London Gateway Logistics Park – there is capacity for a further 150,000 sq m of development. This is not limited to logistics premises, manufacturing can also locate here and recent freeport designation provides additional incentives to businesses looking to relocate.

- Thames Enterprise Park – the former oil refinery at Coryton has recently been granted outline planning consent for a new manufacturing/logistics/green energy hub. The gross area is in the region of 167 hectares and the outline planning application proposes 345,500 sq m across the use-classes.
- Titan Industrial Estate – Titan Works, Grays is occupied by Industrial Chemical Ltd who are to end operations at this site. A transaction has been structured with developers Chancerygate for them to purchase and develop the site out to intensify its use. The scheme does not have planning consent, but a planning application was submitted in November 2022 for the construction of 28 new industrial units on a net site area of 9.1 hectares. Proposed unit sizes range from 407 – 11,040 sq m, totalling around 39,636 sq m.

### **3.7 Summary/Conclusion**

#### **3.7.1 Our key findings include:**

- Thurrock has approximately 1.65m sq m of industrial and warehouse space.
- LSH analysis identifies that annual take-up of premises within the borough averaged just over 100,000 sq m per annum between 2017 and 2021 but fluctuates significantly from year to year. More than twice as much floorspace was transacted in 2017 and 2020 than in the other three years.
- Current availability is approximately 107,095 sq m, which represents approximately 13 months of supply.
- Market activity is dominated by smaller unit sizes; 38% of transactions involved units of less than 5,000 sq ft and 72% involved units of less than 20,000 sq ft. At the other end of the scale units of more than 100,000 sq ft have accounted for 14% of transactions when measured by number of units but 72% of all floorspace.
- The majority of the take-up was for newly constructed facilities at London Gateway, which represents 50% of the total floorspace transacted over this period.
- Due to this, the majority of the floorspace taken up was also classed as Grade A.
- Additionally, 68% of the take-up was for warehouses above 10,000 sq m.
- In regard to availability, we have included schemes that are under construction or have been announced as speculative development. We have analysed the committed schemes with that which is currently available, with the forthcoming schemes representing 83% of the total floorspace available.

3.7.2 The borough of Thurrock has benefitted locally from the economic and global conditions that have favoured the warehouse and logistics market generally. It has positioned itself as a key logistics location

in the South East and harnessed the benefits of the nationally significant ports as well as being a key transport hub for London and the South East. This has resulted in occupiers being attracted to its existing warehouse stock as well as significant take-up at London Gateway, resulting in a number of key transactions of significant size.

- 3.7.3 What the data has shown is that the take-up has favoured the built to suit options at London Gateway. The LDO at London Gateway has given the developers the ability to respond quickly to requirements and to give occupiers a viable option to have bespoke warehousing solutions with additional expansion land. Away from London Gateway, other significantly sized warehouses (whether existing or speculatively built) have been occupied across the borough resulting in limited immediate availability.
- 3.7.4 The current availability across the borough shows only three warehouses above 100,000 sq ft committed for speculative development, with thin availability across all size ranges. Compared to the average annual take-up, the borough's immediate and committed supply for warehouses represents only 13 months of supply. The effect of this will be that occupiers will have to remain reliant on the land immediately available at London Gateway (subject to their size requirements) as well as the additional pipeline of supply coming forward at a good pace.

## 4.0 EXISTING STOCK OF EMPLOYMENT LAND

### 4.1 Overview

- 4.1.1 For the purposes of this ELAA, an existing employment area is defined as “an area allocated for employment purposes, or an area where employment uses are established” (see glossary at Appendix 5). Existing employment areas can incorporate undeveloped plots that are available for development.
- 4.1.2 This assessment of existing employment areas considers their size, attributes, suitability for continuing employment use, and their potential for alternative use. Employment areas can evolve as alternative uses become established and some former employment areas are excluded from this assessment. Although this ELAA can inform the mix of uses, regard will also need to be had to other evidence base documents.
- 4.1.3 Our assessment of existing employment areas is set out in the matrix at Appendix 2. The locations of these areas are shown in purple on the maps at Appendix 1. They are concentrated within the riverside and urban areas in the southern part of the borough. There are only a handful of industrial areas in the more rural northern part of the borough.
- 4.1.4 LSH site inspections and research has revealed that the Council’s mapping of existing employment areas has not reflected changes over time. Boundaries change as development introduces non employment uses, or industrial premises are extended onto neighbouring land or new roads and railways redefine the extent of industrial estates. Some duplication/overlapping of sites was also evident. To establish the amount of existing employment land has required a detailed review of each area and remeasurement. Employment areas that are excluded from further assessment are listed at Appendix 8.
- 4.1.5 The location of industrial development is to a large extent determined by access to markets. In the 19<sup>th</sup> Century the riversides and railways were the transport networks that formed the focus for industrial development, this drove the reclamation of marshland and the provision of jetties and quays. Over the course of the 20<sup>th</sup> Century access to motorways and dual carriageways became a key criterion for industrial and distribution businesses, superseding river and rail access. But in Thurrock, situated on the edge of London with good access to the strategic highway network and port facilities, the industrial areas along the River Thames have largely retained their importance. Proposed new road infrastructure to serve the Lower Thames Crossing which will connect to both the M25 and A13 can be expected to further boost demand for employment land in Thurrock towards the end of the Local Plan period.
- 4.1.6 Typically, established industrial estates undergo a slow process of demolition and redevelopment as buildings reach the end of their economically useful life. Prohibitive costs of land assembly and relocation

of occupiers make wholesale clearance of an established estate unusual. However individual buildings or larger complexes that are time expired, or small clusters of units with high vacancy rates, may have potential for redevelopment for either continued employment use or, if they are peripheral to the industrial estate, for alternative uses. The current strength of the market in Thurrock means that even amongst older stock, void levels are low. This tight supply of premises suggests unmet demand and that more land should be allocated for employment purposes.

4.1.7 Our assessment includes the Purfleet Centre Regeneration area. Purfleet Centre Regeneration Limited (PCRL) is a joint venture between Urban Catalyst and Swan Housing Association, in partnership with Thurrock Council. Its vision is to redevelop an existing employment area to provide new residential neighbourhoods, a new town centre and a cultural industries hub to complement the studios at High House Production Park. This regeneration area is divided into four by the railway and London Road and our assessment considers each separately. Phase 1A of the regeneration, involves housing development on the smallest western quadrant; construction was underway at the time of our site inspections. As such this part is no longer an employment area and is excluded from the assessment. The southern quadrant which fronts the River Thames is vacant. This is classed as available employment land within an existing employment area. Part of the eastern wedge of land is now occupied by the Harris Academy school; the remainder is classed as an existing employment area and is occupied by St Gobain / International Timber. The largest, northern quadrant is a poor quality industrial area, that is intensively occupied, except for a small strip of land at its northern extremity. As the redevelopment of these employment areas progresses, these businesses, which occupy around 30 hectares of land, will need to relocate. Many of these businesses have extensive yards used as truckparks, trailer depots and other forms of external storage. There is limited capacity to accommodate these businesses within existing employment areas in the western part of Thurrock; and in the east the London Gateway Logistics Park and Thames Enterprise Park are unlikely to meet every relocation requirement. The regeneration proposals include the provision of a new employment area to accommodate film and TV studios to complement the cluster of cultural industries at High House Production Park, this could offset the loss of employment land and enable a net increase in employment; the masterplan suggests around 10 hectares of land would be required for the studios.

4.1.8 Titan Works at Grays is another existing employment area where there are plans for redevelopment. This factory complex is surplus to the requirements of Industrial Chemicals Ltd (ICL) and has been sold to a joint venture partnership of Chancerygate and Northwood Investors. Chancerygate is a property developer that specialises in UK industrial and warehouse schemes. The JV intends to demolish the works and develop 39,636 sq m of industrial and logistics floorspace across the site, proposing 28 units ranging

from 407 sq m to 11,040 sq m. ICL is to consolidate its operations and invest in its riverside works at West Thurrock where the site is currently underused. We assess Titan Works as an existing employment area, which is currently not available. But we recognise its capacity to accommodate new industrial development in the early part of the plan period. Titan Works has a gross area of 13.8 hectares and a net developable area of 9.1 ha.

## **4.2 Findings and Recommendations**

4.2.1 Our assessment covers 52 employment areas with a combined gross area of around 1,343 hectares. For the avoidance of doubt, available employment sites within these areas are included in these figures and ports are excluded, from this assessment. The table below assesses the distribution of these employment areas across the borough. Nearly half of land within existing employment areas is in the Stanford-le-Hope sub-area.

**Table 4.1: Distribution of Employment Areas in Thurrock**

<b>Sub-area</b>	<b>Existing Employment Areas (ha)</b>	<b>Share</b>
Purfleet	240.5	17.9%
West Thurrock	280.4	21.0%
Grays	54.0	4.0%
Tilbury	110.5	8.2%
Chadwell St Mary	5.2	0.4%
Stanford-le-Hope	626.1	46.6%
South Ockenden & Aveley	15.0	1.1%
Bulphan	9.0	0.7%

4.2.2 Key qualitative and quantitative data for each area are set out in the matrix at Appendix 2. This data informs our assessment of an area's suitability for continued employment use. Most of these employment areas are well occupied, which is evidence of the tight market for general employment land and premises. In these circumstances we typically recommend that the areas should be retained for employment.

4.2.3 There is a broad range of areas by size and quality, the smallest is Ascension Business Park at Chafford Hundred which comprises modern offices on 0.3 hectares. The largest is the Thames Enterprise Park and the remaining parts of the Coryton Refinery which covers 310 hectares, and includes a power station, oil refinery and vast areas of underused or vacant brownfield land.



- 4.2.4 In some cases, the boundaries of areas which are suitable for continuing employment use, should be reviewed. There are instances where development for employment has extended beyond the allocated employment area (e.g. the new Goodmans warehouse at Purfleet – T44). There are also instances where parts of an industrial area allocated for employment use have become dominated by an alternative use (e.g. retail warehousing at T24), or peripheral areas have been redeveloped for an alternative use (e.g. schools at T33 and T61). Revising boundaries will help to bring clarity to planning policy.
- 4.2.5 There are a few stand-alone employment premises which are occupied by a single business and developed to meet its specific requirements (e.g. Durox Works T 09). Should the business vacate, there may be little interest in the buildings for reoccupation. A pragmatic approach to continued employment use will be needed, particularly if the costs of demolition and site clearance could undermine the viability of redevelopment. We recommend that the Local Plan includes a policy that requires marketing of the buildings and site for continuing employment use, before an application for alternative use will be entertained.
- 4.2.6 Thurrock has several industrial estates with poor quality infrastructure, constrained circulation and limited parking. Examples include Purfleet Industrial Park, Magnet Road, Askew Farm Road, Globe Works and Stanhope Industrial Estate. Some, but not all of these estates are dominated by external storage uses. Our recommendations include the preparation of investment strategies to consider improvements. Notable are the industrial estates that are situated in former chalk pits; whilst these provide good separation and screening from adjoining residential areas, they typically have a single point of access and as businesses have sought to expand, some of these estates have become over developed. Ideally these estates would be priorities for investment in upgraded infrastructure and for “thinning out”; but with limited opportunities for the development of general employment premises elsewhere in the borough, and few vacant plots within the estates themselves, it may be difficult to implement an investment strategy, unless the Council owns the estate. Other options should be explored, and the Council might want to explore incentivising investment through a grants programme. In the longer term the provision of higher quality industrial estates elsewhere might encourage business to relocate, at which point upgrading or redevelopment of older estates may become more practicable.
- 4.2.7 A feature of Thurrock’s employment base is the relatively large areas of land used for external storage. The dominance of the logistics sector has led to requirements for truck parks, trailer & container compounds and external storage; Thurrock also has its fair share of scrap and recycling operations. These types of uses have low employment densities but intensified use of these industrial estates is not an easy option. The proposal for a multi-storey distribution warehouse at Lakeside is unusual. Although

multistorey warehouses are common in densely populated cities with high land values such as Hong Kong, Singapore and Tokyo they have been slow to gain traction in the UK. SEGRO completed the first at Heathrow in 2008 and is planning another in Enfield. Gazeley constructed the UK's first three storey warehouse in Silvertown, East London in 2019. Given market caution, they are unlikely to play a major role in Thurrock's logistics market in the foreseeable future and cannot be relied on to allow more efficient land use over the plan period.

4.2.8 Our site inspections did identify some underused areas of employment land, but these are typically held as expansion land by major industries. As such they are not available to the wider market, until such time as they are regarded as surplus to business requirements. It is also not uncommon for peripheral areas to serve as buffers, particularly where industrial areas adjoin more sensitive uses such as housing. Having regard to these constraints, opportunities for more intensive use of Thurrock's employment areas appear limited.

4.2.9 The land to the north of the Coryton oil refinery (T90) is farmland that the current Local Plan allocates as oil refinery expansion land. As oil refinery operations at Coryton have been contracting and former refinery land is being marketed for wider employment use, the case for continuing to reserve land for expansion is weak. We recommend that the Council considers an alternative allocation.

4.2.10 The Council should also consider reallocating some smaller industrial areas to enable their redevelopment for alternative uses. This should be done carefully, focussing on areas with high vacancy rates, so that Thurrock can still provide affordable options for SMEs. Possible examples include:

- T80 Baryta Close, an old but small industrial area in the centre of Stanford le Hope. The estate is split by a stream, with separate access to each side. The land to the west is available, whilst to the east old buildings continue to be occupied. Whole or part of the estate could be deallocated
- T07 Thames Industrial Park, East Tilbury where much of the stock of premises is reaching the end of its functional economic life and a corner of the industrial park has been redeveloped for housing. Whole or part of the estate could be reallocated for mixed use.

### 4.3 Conclusion

4.3.1 Although some of the longer established estates have poor quality infrastructure and ageing building stock, high levels of occupancy and few suitable premises for local and regional businesses elsewhere in the borough, mean that these allocated employment areas will need to be retained. Redevelopment of plots and upgrading of infrastructure should be taken as opportunities arise. There is a strong case for allocation of additional land in the Purfleet / West Thurrock / Grays area to accommodate general industrial demand, to complement the freeport areas at London Gateway and Tilbury and the cluster of

process industries at Thames Enterprise Park, which although having high volumes of land, appeal to only some sectors of the market.

- 4.3.2 Freeports are ports where normal tax and customs rules do not apply. At a freeport, imports can enter with simplified customs documentation and without paying tariffs. Businesses operating inside designated areas in and around the port can manufacture goods using the imports and add value, before exporting again without paying the full tariff on the original goods they imported – although a tariff may be payable on the finished product when it reaches its final destination. These financial advantages will encourage certain manufacturers and freight forwarders to locate within a Freeport, potentially displacing economic activity from elsewhere.
- 4.3.3 Existing employment areas with the potential for alternative uses to employment land on the whole or part are identified in the matrix at Appendix 2 and summarised in the table below.

**Table 4.2: Employment Areas with Potential for Alternative Uses**

<b>Site Reference</b>	<b>Employment Area</b>	<b>Hectares</b>
T07	Thames Ind Est, East Tilbury	12.7
T14	Manor Way Ind Est, Grays	2.3
T24	Motherwell Way, West Thurrock	6.0
T36	Harris Commercials, 506-512 London Road, West Thurrock	1.2
T37	Star Industrial Estate, Chadwell St Mary	3.9
T60	East of Sandy Lane, Chadwell St Mary	2.3
T61 Including T47	Purfleet Centre Regeneration (north)	26.7
T63b	Purfleet Centre Regeneration (east)	9.1
T67 Including T68	Purfleet Centre Regeneration (south)	13.8
T76	Arisdale Industrial Estate, South Ockenden	2.9
T78a	Maidstone Road, Grays	0.8
T80	Baryta Close, Stanford-le-Hope	2.0
T88	Argent Street, Grays	0.8
T90	Coryton Oil Refinery Expansion Land	44.2
<b>TOTAL</b>		<b>128.7</b>

## 5.0 AVAILABLE AND POTENTIAL EMPLOYMENT SITES IN THURROCK

### 5.1 Assumptions

5.1.1 This section summarises the current availability and past take-up of employment land in Thurrock, to provide a context for the assessments of demand and supply and individual recommendations on sites, where appropriate. An analysis of past take-up rates and currently available land is used to calculate an implied supply and to assess the scale of additional allocations required. Take-up rates should not be interpreted as a comprehensive assessment of future requirements. They should be used in conjunction with the estimates of the need for employment land derived from the economic forecasting prepared by Hatch Regeneris as part of the Thurrock Economic Development Needs Assessment (TEDNA). However past take-up rates can be a useful reality check for other forecasts.

### 5.2 Context

5.2.1 Planning Practice Guidance notes that employment land markets overlap local authority areas; and the market for employment land within Thurrock needs to be understood within a broader geographical and policy context. It is well established that markets for employment land and premises functions across local authority boundaries, and given the mobility of employees, the role of a local authority area within a wider sub-region is relevant.

5.2.2 This is of particular relevance to Thurrock, in the southwest corner of Essex where it adjoins the Greater London authority of Havering. Although 70% of the borough forms part of the London Green Belt, Thurrock's location on the Thames has established it as a gateway to London and the wider south of England for goods imported by sea. Along an 18 mile stretch of the river are various ports, oil refineries and other industries that utilise the river. The borough also has strong links to the strategic highway network. The M25 passes through the western part of the borough crossing the River Thames at the Dartford crossing, whilst the A13 dual carriageway provides a fast east-west road link through the south of Essex and into London. These good road links to ports and markets have resulted in strong demand for logistics and distribution premises. The A127 dual-carriageway, linking Basildon and Southend to Junction 29 of the M25, lies just to the north of the borough, stimulating demand for nearby sites with convenient road access, including some sites in the northern part of Thurrock.

5.2.3 The constraints of the Green Belt, strong demand for sites for logistics premises and competing demand for housing sites has led to a tightening supply of land for general industrial activities. Whilst many of the borough's general industrial estates are at capacity, regeneration of riverside industrial areas has provided large sites that are effectively reserved for specific uses, such as ports, container terminals,

chemical industries, large scale logistics premises etc. To better understand these market dynamics our analysis has regard to these different uses.

- 5.2.4 An accepted methodology for the quantitative analysis of employment land is to divide the amount of land currently available for economic development by past take-up rates to arrive at a number of years' supply. In determining appropriate levels of allocation planning inspectors have typically sought to ensure supply is adequate for the plan period. But more recently, recognising that recycled employment sites can play an important role in replenishing supply some local authorities are adopting a 'monitor and manage' approach by ensuring a five year supply of readily available sites and a further five year reservoir of sites that can be made readily available to replenish this supply.
- 5.2.5 NPPF requires Local Plans to *"be drawn up over an appropriate time scale, preferably a 15 year time horizon."*<sup>1</sup> Thurrock's emerging Local Plan is to cover the period from 2022 to 2040, an 18 year period. LSH's assessment of the availability and take-up of employment land records the position at the time of site inspections (conducted by LSH in August 2022) and considers the appropriate level of allocation for the 18 years to the end of the Plan period.
- 5.2.6 Past take-up of employment land is affected by prevailing economic conditions and policy initiatives. Planning, regeneration, fiscal and financial policies can all impact upon the scale and location of take-up, whether intentionally or unintentionally. By considering past take-up over both short and long periods the effects of economic cycles and policy changes can be evened out and the stock adjusted, whilst shorter term trends can be identified. To identify where take-up has occurred, we have compared Google Earth imagery of the borough's employment areas over time. Imagery for the whole of Thurrock is available from 2003 to 2022, thus, to measure whole calendar years we have assessed take-up over the 18 year period 2004 to 2021 inclusive. Our analysis categorises this take-up by date, location and end use. Through this process it is apparent that redevelopment of established employment areas has delivered much of the new floorspace; and in a few instances sites have been redeveloped twice within the period studied (e.g. the top yard at Ensign Industrial Estate, Purfleet).
- 5.2.7 Various factors make any quantitative analysis an inexact science. On the supply side of the equation the total amount of land available at any given point in time is indeterminate. The exact amount available depends upon:

---

<sup>1</sup> Paragraph 157, National Planning Policy Framework, Communities and Local Government, March 2012

- The size of private reserves (i.e. industrial land held with existing buildings for expansion). These are normally excluded from the analysis as they are not generally available for development. Where a large proportion of businesses hold expansion land this can lessen demand for available land; but from LSH's assessment of the borough's employment sites there appear to be few areas of land reserved for expansion. In policy terms expansion land should be considered as part of a business's occupied site, until such time that it becomes surplus to the requirements of the business.
- The number of windfall sites arising which are not presently allocated for employment uses but which may become available for such uses.
- The number of further sites becoming available through the recycling of land currently in employment use. Through the site inspection process, LSH noted demolition activity that had or is resulting in sites becoming available. Having regard to the constraints on development across large parts of the borough, the redevelopment of brownfield sites is important for the maintaining of a supply of sites.

5.2.8 On the demand side it is assumed that all existing industrial allocations will remain in such use when in reality some of the land may be taken up for other uses. The extent to which the Council should plan for the replacement of future losses of employment land is addressed in the TEDNA.

5.2.9 The conservative estimate of the total supply of land on the one hand, and the under-estimate of total consumption on the other will, to some degree, cancel each other out.

5.2.10 NPPF requires local planning authorities to *"have a clear understanding of business needs within the economic markets operating in and across their area."* Where there are distinct property market areas PPG proposes analysis by market segment and by sub-area. Within Thurrock there are sectors with specific needs and site requirements, for example ports, oil refineries and chemical works, which require marine access. These specialist employment uses form clusters along the Thames; and though there are areas devoted to one particular use, some of these areas, have over time come to support a broader mix of employment uses including waste management, transportation services, vehicle repair and plant hire.

5.2.11 In providing a list of employment sites to assess, the Council has excluded land at Tilbury Docks and the container terminal and berths 4, 5 and 6 at London Gateway. For consistency LSH has also excluded Tilbury 2 (Forth Ports) and Purfleet Docks (C.Ro Ports) from our analysis.

5.2.12 The government recently identified land in three locations for the Thames Freeport. The locations are Dagenham (west of Thurrock), Tilbury (principally on land to the east of Tilbury 2) and London Gateway (parts of the Logistics Park and a site to the west of the park). The tax site boundaries encompass:

- Land currently in employment use within existing employment areas.
- Land available for development within existing employment areas.
- Land outside existing employment areas (this ELAA assesses these as potential employment sites).
- Roads and infrastructure corridors linking some of the tax sites. These are important to allow goods to be moved overland between different parts of the Freeport without compromising their tax status, but as they do not provide opportunities for development these corridors are excluded from this ELAA's analysis of employment land.

5.2.13 A glossary of terms used in this employment land availability assessment is attached at Appendix 5.

5.2.14 The starting point for LSH's assessment of employment land within the local authority area has been digital mapping layers provided by the Council, which identify the locations of established and potential employment areas and the locations of available sites within these areas. Guided by this information LSH inspected all employment areas to verify current availability and to identify where land has been taken-up for development. These site inspections were carried out over three days in August 2022.

5.2.15 LSH has reviewed the Council's list of sites to distinguish between available employment sites, potential employment sites, occupied sites and existing employment areas. In considering the supply of and demand for employment land within Thurrock, LSH has used a three stage approach:

- First the amount of land currently available for employment development has been considered and compared against past take-up rates to arrive at a notional number of years supply within the borough. This allows LSH to assess whether current allocations and other available employment land is likely to be sufficient for the plan period.
- The second stage is to consider whether these sites are immediately available or require preparation and thus their ability to meet demand in the short term.
- The third stage is to assess potential sites to understand how they might meet shortfalls in the amount or type of employment land that is required.

### 5.3 Quantitative Analysis

- 5.3.1 In accordance with previous planning policy guidance LSH has disregarded sites of less than 0.25 hectares in size. We have also excluded sites that are being held for expansion by an occupier, these are not available to the wider market for development and their inclusion might result in double counting of take-up. However, where land is held by a developer for a further phase of development this would meet general market demand and is thus included within the supply of employment land. Sites identified by the Council that have been excluded from our assessment and the reasons for their exclusion are listed at Appendix 8.
- 5.3.2 LSH has inspected all the sites, identified boundaries and site areas, and assessed each according to a range of market and sustainability criteria. The assessment matrix is attached at Appendix 3 and a detailed guide to the assessment criteria is set out at Appendix 4. To enable a high level comparison of the features of each site, the matrix uses numbers from 1 to 5 to identify various qualities of the sites. For some criteria, the numbers represent a ranking, whilst for others the numbers represent a category that, depending on the end use of the site, may not be better or worse than another. It should be noted that LSH's overall recommendations are not based solely on this numbering; other factors may also have been considered. Nor does the numbering imply that the various criteria are of equal weight.
- 5.3.3 Within the borough there are 51 available sites with a combined gross site area of 377 hectares. These are listed in the matrix at Appendix 2. To assess the net developable area, LSH have applied gross:net ratios as appropriate. A guide to the adjustments appropriate in different circumstances is set out at Appendix 5. Net developable areas at Thames Enterprise Park have been sourced from a plan prepared by Barton Willmore dated 2<sup>nd</sup> February 2022. <sup>2</sup>
- 5.3.4 Available employment sites provide an estimated net developable area of 311 hectares. Of those 51 available sites, eight have been discounted following their qualitative assessment and through discussions with the Council as they are no longer expected to come forward for employment use in the future. The eight sites are as follows:
- T42 Plot 44 Purfleet Industrial Park
  - T47 Botany Way, Purfleet
  - T63a Former Thames Board Mills Site, London Road, Purfleet
  - T67 & T68 West of Purfleet Station
  - T35a Off eastern end of Oliver Road and north of sub-station
  - T85e South of Flint Street
  - T22a NE nib, Tilbury South

<sup>2</sup> Thames Enterprise Park, Parameter Plan 2 Development Plots. Drawing No. SK159, revision E.

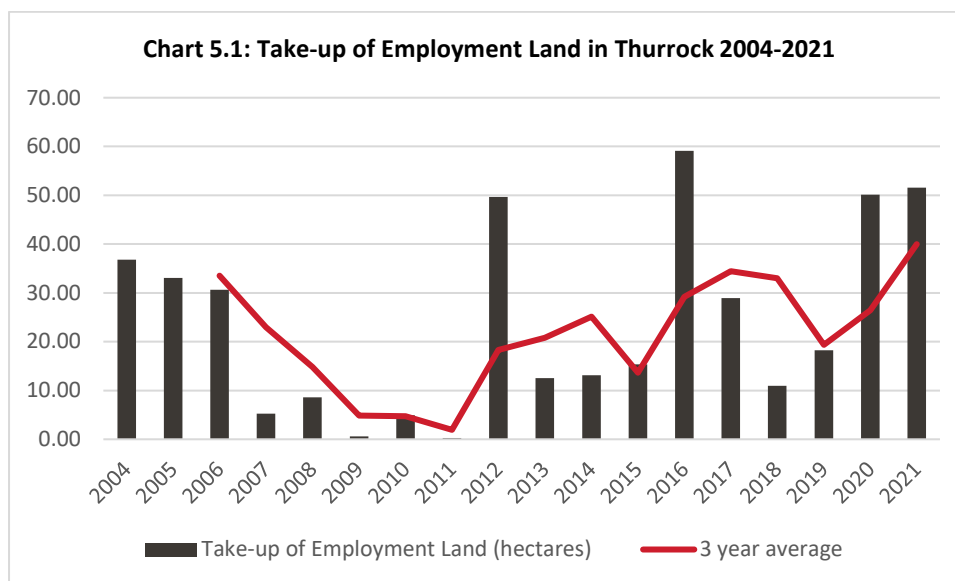


- T80 West of Baryta Road

The remaining 43 available sites have a combined gross site area of 357 hectares and an estimated net developable area of 294 hectares.

5.3.5 Thurrock Council measures development activity by recording the overall employment floorspace developed each year in its Authority Monitoring Reports. However, a more useful measure of development activity that allows direct comparison with the employment land supply is the take-up of land for the development of employment premises measured by site area.

5.3.6 Take-up of employment land in Thurrock over the 18-year period 2004-2021 is recorded on a site-by-site basis at Appendix 6. Some 432.59 hectares of land have been taken-up for employment use, of which 127.83ha have been within ports and 304.76 ha elsewhere in the borough. To be consistent in our approach to availability and take-up we have excluded take-up in the ports. Take-up of 304.76 hectares equates to an average of 16.93 hectares per annum.



Source: LSH

5.3.7 Take-up of employment land in Thurrock can vary widely from one year to the next, as shown in the chart above. Using a three-year average smooths these erratic movements and shows how take-up has responded to wider economic factors. Over the seven-year period, 2007 to 2013, the UK recession and the subsequent period of weak economic growth resulted in take-up rates in Thurrock of less than 10 hectares per annum. Development at the London Gateway Logistics Park commenced in 2015; some pent-up demand boosted take-up in the early years but then declined until the impact of the Covid

pandemic on the growth of on-line shopping provided a renewed boost to the development of distribution warehouses and logistics facilities.

5.3.8 From our site inspections in August 2022, it would appear that annual take-up of employment land in 2022 will be lower than in the previous two years. At the time of our site inspections, we noted around 6 hectares of land under development. Although current low vacancy rates suggest there is scope for further development, worsening economic conditions may temper development activity in the next few years. For the purpose of forward planning over an 18 year period, we recommend that the Council uses the long term average of 16.93 hectares per annum.

5.3.9 In the table below land currently available for development is measured against average annual take-up since 2004. Across the borough as a whole, currently available employment land is sufficient for 17 years, which broadly aligns with a Local Plan period of 18 years.

**Table 5.1: Employment Land Availability and Take-up by Location**

Location	Take-up (ha)	Take-up p.a. (ha)	Availability (ha)	Implied Supply (years)
London Gateway	73.84	4.10	117.12	28
Thames Enterprise Park	0	0	92.68	∞
Oil Refinery Expansion	0	0	39.79	∞
Purfleet	85.22	4.73	17.41	3
West Thurrock	82.17	4.57	18.63	4
Tilbury	50.93	2.83	7.62	2
Grays	3.63	0.20	0.66	3
Stanford le Hope	5.47	0.30	0	0
Bulphan	1.19	0.07	0	0
Aveley	2.31	0.13	0	0
South Ockenden	0	0	0	0
<b>Thurrock</b>	<b>304.76</b>	<b>16.93</b>	<b>293.91</b>	<b>17</b>

Source: LSH

5.3.10 However, available land is not distributed evenly across the borough. In the table, locations are ranked according to the amount of land that is currently available. Three locations account for 85% of the borough's currently available land; these are London Gateway Logistics Park, Thames Enterprise Park and the oil refinery expansion land at Coryton. When measured against past take-up the implied supply at these three sites is far more than required for an 18-year plan period, though at a local level the measurement of annual take-up is distorted by various factors:

- at Thames Enterprise Park substantial land has become available for redevelopment, but the phased remediation and site works will only slowly provide sites that are readily available,

- London Gateway is further progressed as a redevelopment scheme, but take-up only commenced in 2015.
- the refinery expansion land has been available for decades but, because it was reserved for a specific purpose, has never been available to the general market.

The refinery expansion land would require substantial infrastructure provision to enable its development and would also require the allocation that safeguards the site as expansion land to be removed. Given the scale of land that has become available for redevelopment in this corner of the borough and having regard to our analysis of existing employment areas we recommend that the Council carefully considers the case for retaining the refinery expansion land in its employment land portfolio.

5.3.11 In the employment areas of Purfleet and West Thurrock where 55% of take-up has occurred, available land equates to around three years supply. The Purfleet Centre Regeneration proposals, if implemented in their current form, reduce the amount of available land in Purfleet by 11.14 ha. The majority of the remaining available land is situated within the long established industrial areas to the south of the A1090 London Road; the more modern employment areas to the north have very little land available for development.

5.3.12 In the smaller towns and villages in the northern part of the borough there is very little land available for employment development. Housing pressures have resulted in older industrial areas being redeveloped for residential, notably in South Ockenden, and in these locations low take-up for employment purposes may be due to a lack of sites rather than a lack of demand. The Council should ensure that some level of employment land is retained in such locations, to ensure a stock of workshops to meet the needs of local SMEs.

5.3.13 The table below identifies the amount of available industrial land within specific employment areas.

**Table 5.2: Available Employment Land by Location**

Industrial Estate / Existing Employment Area	Ref	Available Sites (no.)	Available Sites (ha)
London Road, Purfleet	T27, T28, T48 & T52	5	17.41
Western end, West Thurrock	T54b, T81a	2	18.64
Manor Way Industrial Estate, Grays	T14a	1	0.66
Thurrock Park, Tilbury	T21	1	4.01
Tilbury South, Tilbury	T22	1	0.89
Thames Industrial Estate, East Tilbury	T07	2	2.72
London Gateway Logistics Park	T05	12	117.12
Thames Enterprise Park, Coryton	T06	18	92.68

Oil Refinery Expansion, Coryton	T90	1	39.79
---------------------------------	-----	---	-------

5.3.14 From our site inspections it has been apparent that whilst there is a large amount of land available for specific uses such as logistics and port, there are few opportunities on local industrial estates to meet future requirements for general industrial premises. Many of the borough’s industrial estates are at capacity and are prevented from expanding by physical constraints, such as chalk pit cliffs, or by policy constraints such as Green Belt designations. In response to these constraints some businesses have encroached onto neighbouring land without regard to the need for planning consent. As noted above, opportunities for intensification would appear limited.

5.3.15 The qualitative assessment of the available sites set out in the matrix at Appendix 3 concludes that the Council should consider retaining the majority, but identifies four sites which do not satisfy all three of the NPPF criteria “suitable”, “available” and “achievable” and which could be released for alternative use or development. The four sites are:

- T14a – the Council should consider whether to reallocate the whole or part of Manor Way Industrial Estate, Grays for alternative use or development.
- T07a & T07b - the Council should consider whether to reallocate the whole or part of Thames Industrial Estate, East Tilbury for alternative use or development.
- T90a – the oil refinery expansion land at Coryton (see paragraph 5.3.10).

5.3.16 The sites that could potentially be released have a combined net developable area of around 43.17 hectares. If the Council decided through the Local Plan to release any or all of these sites, their total area should be deducted from the overall supply.

#### **5.4 Immediately Available Employment Land**

5.4.1 For sites to meet demand they must be capable of development. Some of the available employment sites require substantial expenditure on site assembly, clearance, remediation or infrastructure provision before development can take place. The time it takes to bring forward such sites can be more dependent on the availability and prioritisation of funding than the time taken to carry out the necessary physical works. Once site assembly has been completed, only sites requiring major remediation or infrastructure provision would be expected to take more than a year to bring forward.

5.4.2 The stock of immediately available employment sites comprises 15 sites totalling 112 hectares as summarised in the table below.<sup>3</sup> . Against average take-up of 16.93 hectares per annum this equates to 6 years supply. LSH recommends that the Council aims to maintain a five-year reservoir of immediately available employment land by working with landowners and developers to bring forward investment in site preparation and to ensure that these sites are in deliverable locations. On the face of it there is sufficient immediately available land in the borough, but some 93% of this land is within the London Gateway Logistics Park or at Thames Enterprise Park.<sup>4</sup> London Gateway is designed to accommodate large logistics premises, freeport status may now encourage some manufacturers with large requirements to consider locating there. Thames Enterprise Park is suited to process industries and other bad neighbour operations, particularly those requiring large sites. Only three sites totalling 7.88 hectares are outside of these areas underlining the barriers to development of general industrial premises.

**Table 5.3: Immediately Available Employment Sites**

Site Ref	Site	Gross Site Area (Ha)	Gross : Net Ratio	Estimated Net Area (ha)
T27	North of ADM Pura Foods, London Road, Purfleet (west)	0.77	100%	0.77
T27	North of ADM Pura Foods, London Road, Purfleet (east)	6.66	100%	6.66
T07	Southern edge of Thames Ind Est, East Tilbury	0.45	100%	0.45
T05	Plot 2, London Gateway Logistics Park	7.89	100%	7.89
T05	Plot 3, London Gateway Logistics Park	22.40	100%	22.40
T05	Plot 4, London Gateway Logistics Park	30.08	100%	30.08
T05	Plot 5, London Gateway Logistics Park	14.30	100%	14.30
T05	Plot 6, London Gateway Logistics Park	9.92	100%	9.92
T05	Plot 7, London Gateway Logistics Park	2.62	100%	2.62
T06	Plot A, Thames Enterprise Park, Coryton	0.70	70%	0.49
T06	Plot B, Thames Enterprise Park, Coryton	1.30	100%	1.30
T06	Plot C, Thames Enterprise Park, Coryton	5.20	100%	5.20
T06	Plot D, Thames Enterprise Park, Coryton	5.80	40%	2.32
T06	Plot E, Thames Enterprise Park, Coryton	11.30	55%	6.22
T06	Plot F, Thames Enterprise Park, Coryton	3.50	40%	1.40
	<b>TOTAL</b>	<b>122.89</b>		<b>112.02</b>

Source: LSH

<sup>3</sup> For the purpose of this analysis we have excluded T07b, which could potentially be released (Para 5.3.15 refers).

<sup>4</sup> It is assumed that site works that were underway at the time of our inspection will, on completion, provide immediately available

5.4.3 The disproportionate impact of London Gateway on the analysis hides development activity elsewhere. Since 2015 when take-up at London Gateway commenced, 72.36 hectares (47%) have been taken-up at London Gateway and 81.75 hectares (53%) has been taken-up elsewhere. Outside of London Gateway this recent take-up has averaged 11.68 hectares per annum. Against this average the 7.88 hectares of immediately available general employment land is less than a year's supply. We recommend that the Council identifies and enables the provision of more general employment land, whether that is part of the stock of available sites or new sites.

## 5.5 Potential Sites

5.5.1 For the purposes of this assessment LSH has defined potential sites as land that is neither allocated for employment, nor within an established employment area, but which has been identified by the Council for assessment (see Appendix 5).

5.5.2 The government's designation of Freeports has identified land within existing employment areas (including occupied land and premises that are not available for development) as well as in areas that are not allocated for employment purposes. These are:

- Tilbury 3 Phase 1 – 15.0 hectares to the east of Tilbury 2 and south of the electricity substation,
- Tilbury 3 Phase 2 – 34.4 hectares to the east of Tilbury substation,
- Tilbury 3 hinterland – 69.9 hectares of farmland to the north of Tilbury 3
- Tilbury 4 – 21.1 hectares of former ash fields beside the river (Mott land)
- 23.7 hectares to the west of London Gateway Logistics Park

For the purposes of this study these five sites are categorised as potential sites.

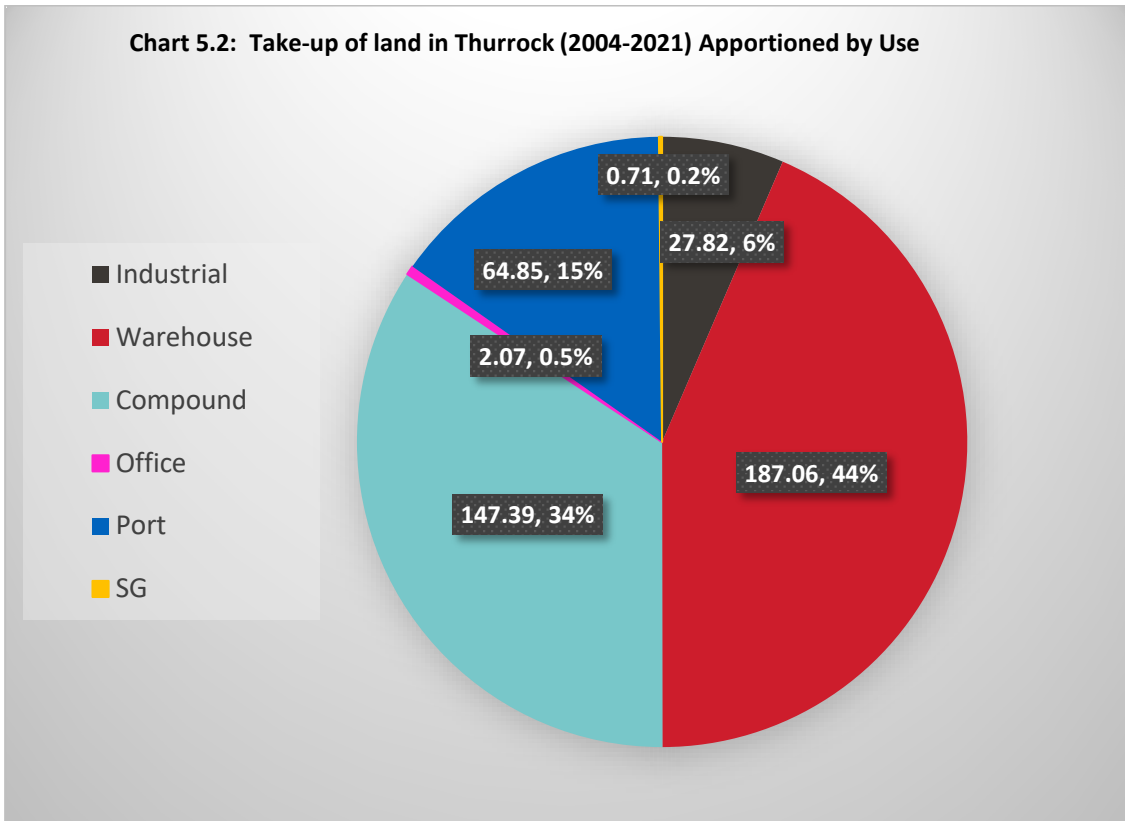
5.5.3 Although the land to the north of the Coryton oil refinery (T90) is not developed, it was allocated as primary employment land to accommodate the expansion of the oil refinery. This ELAA therefore categorises the land as an existing employment area. 90% of the oil refinery is now non-operational and is being redeveloped as the Thames Enterprise Park; having regard to this change of circumstances the Council should consider whether this expansion land remains continues to be suitable for employment.

5.5.4 Potential sites are assessed in the matrix at Appendix 7 and shown coloured yellow on the map at Appendix 1. There are 29 sites ranging from 0.35 to 145 hectares with a cumulative gross area of 834 hectares.

5.5.5 The quantitative analysis above identifies that although, when assessed against past take-up, overall there is sufficient available employment land within the borough for the period of the emerging Local Plan, it is not evenly distributed. Available land is concentrated within the eastern part of the borough, where much

has Freeport designation and is particularly suited to distribution premises and storage land. The Thames Enterprise Park proposes a mix of uses, but it is still unlikely to meet the requirements of all industrial sectors. The site accommodates oil refineries, tanks farms, a power station and other “bad neighbour” uses. The outline planning application is for demolition and the phased remediation and redevelopment of 167 hectares *“to provide up to 345,500 sq. m of commercial development including Manufacturing; Storage, Distribution & Logistics (Use Class B2/B8); Energy & Waste related facilities (Use Class Sui Generis); A Central Hub incorporating a range of active uses (Research & Development, leisure, education, hotel and conferencing facilities) (Use Classes B1(b), D1, D2, C1) and ancillary retail/leisure/community facilities (Use Classes A3, D2 & Sui Generis), as well as additional land set aside for a Rail Freight Terminal; Up to 20 Hectares of Open Storage (Use Class B8); Energy Centre; Lorry Parking Facilities ...”* The type of development proposed and its location within the Borough may be considered unsuitable for some businesses.

- 5.5.6 Similarly, much of Thurrock’s general employment land is situated in long established industrial areas within the urban areas along the southern edge of the borough where the estate infrastructure is of poor quality. Where modern industrial estates have been provided such as at West Thurrock or at Thurrock Park, Tilbury, demand has been strong, with the result that there are currently no serviced plots available in such locations. In allocating new employment areas, the Council should prioritise the provision of land that could accommodate industrial estates which can offer a range of plot sizes, but which are particularly aimed at small and medium sized units. In section 3 the commercial market assessment identifies a short term need for units of less than 500 sq m. Thurrock does not lack sites for large scale logistics premises.
- 5.5.7 An analysis of take-up of land by use reveals that warehouses account for 44%, compounds for a further 34%, port areas for 15% and industrial units just 6%. Take-up of land for offices and sui generis uses, together account for less than 1% of land. It is important to recognise that the land and premises requirements of local and regional businesses are also largely for storage and distribution use. We recommend that in allocating land for smaller requirements, it is allowed to accommodate the full spectrum of employment uses - classes E(g), B2 and B8.



Source: LSH

- 5.5.8 The Green Belt which has been tightly drawn around built up areas is a policy constraint that significantly impacts on the provision of additional land for employment purposes. There are some existing employment areas within the Green Belt, which are unable to expand. We note that potential employment sites which have been promoted by developers or landowners through the Call for Sites, are largely located in the Green Belt. When assessed against the NPPF criteria of suitability, Green Belt sites are regarded as unsuitable for development.
- 5.5.9 There are a few potential employment sites that are not in the Green Belt (T31a, T57b, T57c, T91 & T99). Of these, Thurrock Shopping Park (T31) was occupied at the time of our inspections and thus not currently available. The land to the east of West Thurrock Way (T99) is a narrow site with high abnormal costs and the viability of providing serviced development plots is likely to be marginal. If the Council is to allocate more employment land, then it will need to consider the relative importance of sites to Green Belt objectives.
- 5.5.10 An important consideration in amending Green Belt boundaries is to ensure that new boundaries are defensible over the long term. Thus using established natural features, roads or railways should be



considered as strong boundaries. We note that potential sites have been identified along the route of the proposed new motorway serving the Lower Thames Crossing (LTC). The current timetable for the LTC is for construction to commence in 2025 with completion in 2032. The Development Consent Order was validated by the Planning Inspectorate in November 2022 and will enter into an examination process soon. Having regard to the scale of disruption involved in the construction of this major piece of infrastructure, bringing forward employment land beside the new road would need to be after completion of the LTC, i.e. nearly a decade from now. The land at South Ockenden (T58) and East Tilbury Marshes (T96) are both large potential sites which are advantageously located on the line of the motorway, this could raise their profile in due course. However, it could be argued that the Freeport sites provide sufficient employment land beside the LTC at Tilbury and that with other available riverside sites elsewhere, East Tilbury Marshes would not be required within the plan period.

- 5.5.11 Other potential employment sites have been identified adjoining established infrastructure, notably sites T41, T100 & T102 which all adjoin the A13. Whilst all but the smallest potential employment sites are likely to require infrastructure to create development plots, larger and/or more remote sites may also require substantial off-site infrastructure to provide access and utilities. These and other abnormal costs of development will impact on viability, potentially frustrating delivery or requiring public sector financial support. Site specific utilities searches are beyond the scope of this assessment but two Green Belt sites (T101 & T102) have established infrastructure which could be upgraded and extended. Another eight potential sites in the Green Belt (T82, T39, T57d, T83a, T83b, T97, T45 and T95) may be able to take access from adjoining roads without the need for major off-site junction improvements.
- 5.5.12 When assessed against the NPPF criteria of suitability, availability and achievability none of the potential sites that we have been asked to assess, meet all three criteria. The majority, through their Green Belt allocation fail the suitability test.
- 5.5.13 In selecting sites to be allocated for general employment purposes, we recommend that the Council uses a fine-grained approach using the market and sustainability factors identified in the matrix of potential employment sites. Key considerations should be opportunities to provide sites in the western part of Thurrock to complement the plentiful supply in the eastern part. Proximity and easy access to junctions on the strategic highway network, should be a key consideration but it is also important that the local road network is suitable for HGVs and avoids residential areas. Other things being equal, the cost of infrastructure provision per developable acre is typically lower for larger sites; it can be more economic to provide one large new allocation than several small ones. Similarly, an estate with a large workforce improves the viability of public transport provision and other amenities. However, these cost advantages

may be offset by other abnormal costs such as ground works, remediation, utilities upgrades and off-site works.

5.5.14 Sites well situated to serve the market for employment premises in the Purfleet and West Thurrock areas are listed below. The Council should consider allocating some or all as employment land.

- T31a Thurrock Shopping Park, Lakeside. There is a proposal to replace retail warehouses with a two-storey warehouse, the effect of which would be to extend T31 northwards.
- T57 Union Rail, Purfleet. Although fragmented by railway lines there is a wedge of land fronting the A1306, with access provided by the stub of Tank Hill Road. The road embankment taking New Tank Hill Road over the railway, has truncated the eastern tip of Purfleet Industrial Park, but a balancing pond and substation on the northern end leave less than 0.25 hectares available. At the southern end a narrow triangle of land could be allocated (T57b); and beyond the railway tracks T57d could be used to enable the extension of Milehams Industrial Estate (T03), but with the Mardyke forming the southern boundary T57d may have value for flood mitigation and/or wildlife.
- T101 Mardyke Farm, Ship Lane. An employment scheme is proposed on the eastern end of this area would have good access to the M25. A preliminary site layout shows the site accommodating a range of unit sizes.
- T102 Arena Essex. The owner is promoting housing and industrial / warehousing on this previously developed Green Belt site, which has established access to the highway network.

5.5.15 At Grays the redevelopment of the Titan Works will provide new industrial units. The call for sites has identified a strip of land between the A13 and the northern edge of Chafford Hundred which could further complement the supply in this location.

## 6.0 CONCLUSION

### 6.1 Land for Office Development

6.1.1 The stock of offices in Thurrock is small compared to surrounding districts, but vacancy rates are not indicating shortages or unmet demand. There are higher vacancy rates amongst larger units and demand is predominantly from local businesses requiring smaller units.

6.1.2 Over the last 18 years take-up of land for office development has totalled just 2.35 hectares. From analysis of this past take-up, speculative office development seems unlikely. New offices have come forward as bespoke schemes for specific occupiers. Just as an office block was developed as part of the London Gateway scheme, so Freeport status could stimulate office development to accommodate services that support port related activities such as customs or border forces. The specific locational requirements of occupiers make forward planning challenging, and we do not recommend allocating sites specifically for office development. Instead planning policies for ports, general employment areas, mixed-use sites and town centres should all allow for the provision of offices.

### 6.2 Land for Industrial and Warehouse Development

6.2.1 The combination of ports, proximity to the M25 and easy access to the London and South East marketplace has ensured that Thurrock is a “hot spot” for logistics operations. Strong demand for industrial premises is demonstrated by the low vacancy rate, particularly for units of less than 500 sq m. Whilst there is also little available stock amongst larger unit sizes, the accelerated planning process for bespoke units at London Gateway Logistics Park, combined with ready availability of sites has satisfied demand in this sector of the market.

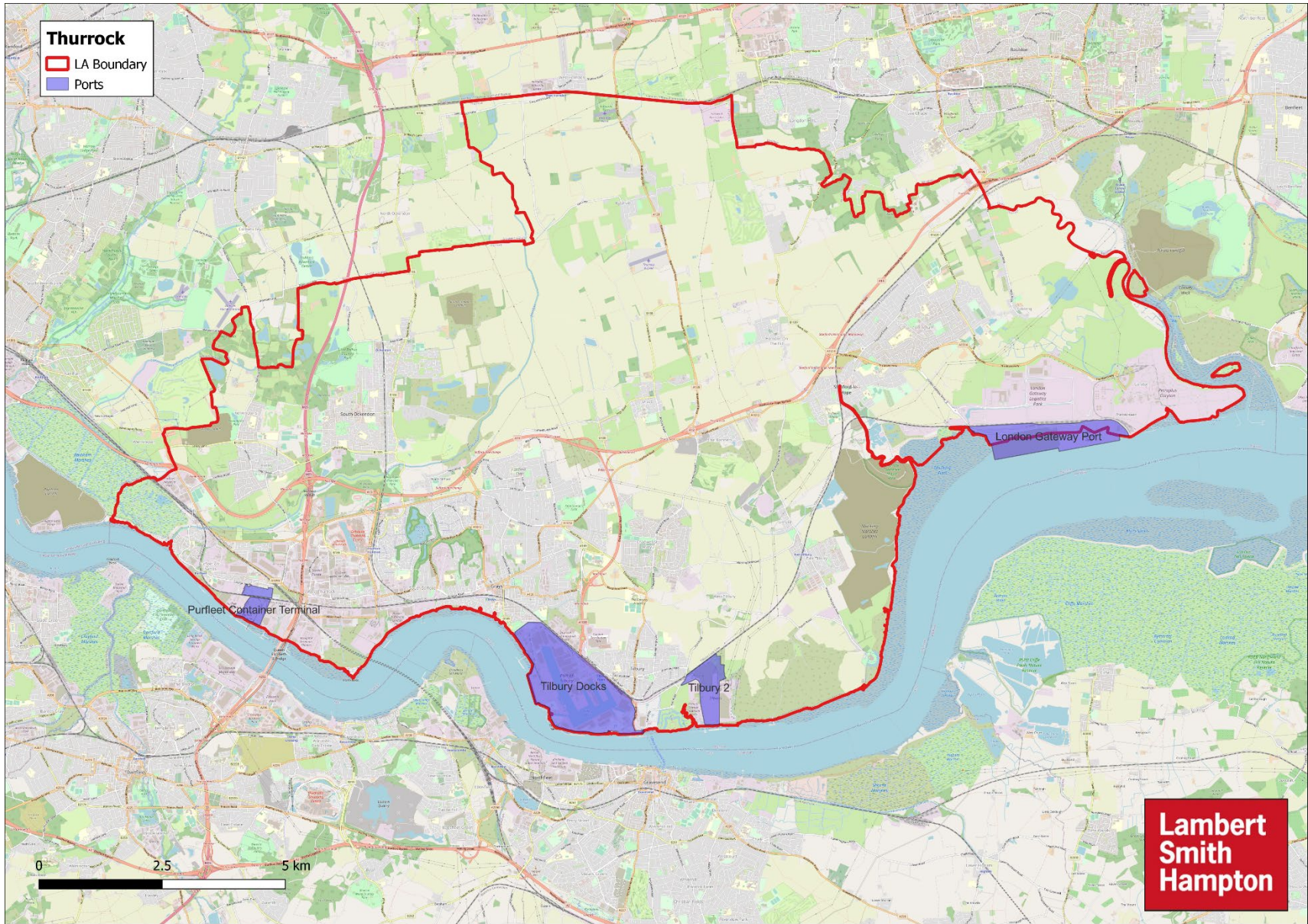
6.2.2 Take-up of 304.76 hectares of land for industrial, warehouse and compound use over the last 18 years, equates to 16.93 hectares per annum. This compares with 310.92 hectares of available employment land in Thurrock. Through our qualitative assessment and discussions with the Council, eight sites totalling 17.01 hectares have been discounted from the supply which reduces supply to 293.91 hectares. We have also identified a further four sites with an estimated net developable area of 43.17 hectares that the Council could reallocate through the Local Plan process. The government has designated Freeport sites these have an estimated net developable area of 139.50 hectares, which could supplement the overall supply. At this stage it is unclear how much of the Freeport land would be used for Port operational purposes and how much for general employment. Moreover, the Council is not obliged to include Freeport sites within the employment land portfolio. The analysis of past take-up supports the allocation of additional general employment land in the Purfleet / West Thurrock / Grays area to provide greater locational choice.

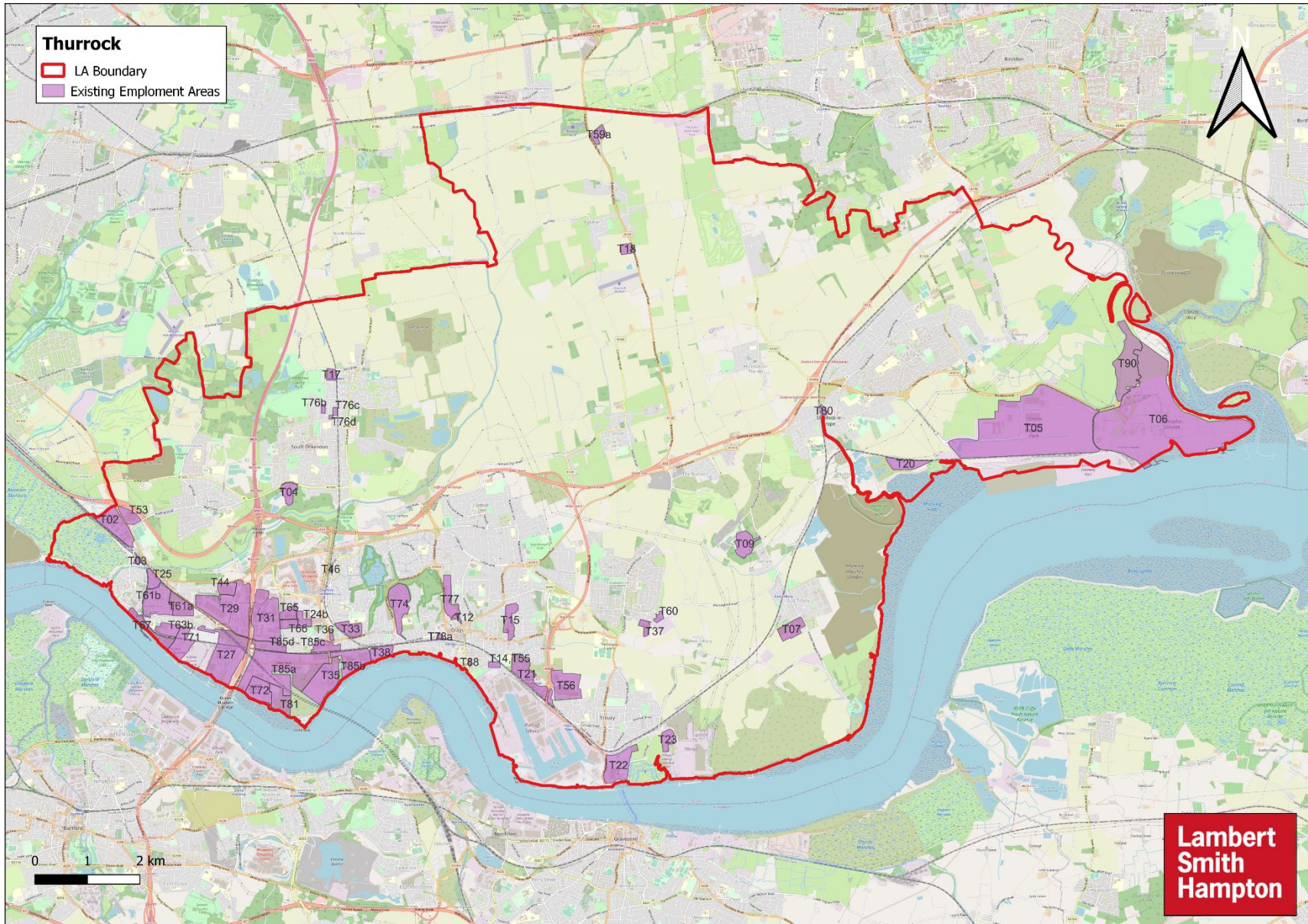
- 6.2.3 The Council's overall portfolio of sites should aim to accommodate a wide range of requirements including offices, industrial and warehouse premises and storage compounds. Available sites in the Grays, West Thurrock, Purfleet area are largely brownfield, typically requiring preparation and thus not currently providing readily available development plots. The proposal to redevelop Titan Works will provide some speculative industrial premises and further potential allocations that are able to provide a mix of unit sizes and types in this part of the borough should be supported.
- 6.2.4 The call for sites has identified some sites that appear to be dependent to some extent on infrastructure provided in conjunction with the Lower Thames Crossing. Having regard to current uncertainty regarding infrastructure expenditure, there is a risk that the new road will not be completed by 2030. It would be premature to allocate sites prior to the grant of permission. The new road linking the Lower Thames Crossing to the M25 has limited junctions with the existing highways network; sites along the route may therefore have no better access to the strategic highway network than currently. It should be noted that concerns are being expressed that higher volumes of traffic at the junction of the new road and the A13 will impact on drive times from employment sites in the east of the borough. The proof of this and its impact on different employment sites will not be clear until the new road is operational. The Council could either reconsider the potential of sites along the route of the LTC as part of its five yearly reviews, or the Council could allocate sites now, whilst recognising that such land is not likely to be available within the next 5 years, and should the DCO not be granted permission, a Local Plan review should consider removing them from allocation and progressing alternative allocations.
- 6.2.5 The call for sites has also identified a site to the north of Bulphan which would substantially increase the established cluster of employment premises around Blue House Farm. This site is close to the northern boundary of Thurrock and we recommend that the Council co-operates with Brentwood and Basildon Borough Councils to better understand the balance between the supply of, and demand for, employment land in this sub area and specifically whether there is a shortfall of employment land that might justify allocating land at Bulphan.
- 6.2.6 Our assessment of potential employment sites identifies that all are constrained in some way, whether by policy (e.g. Green Belt), physical (e.g. abnormal costs) or legal (e.g. ownership or CPO) constraints. Only five of the potential sites are outwith Green Belt and one of these has substantial physical constraints. Two potential sites in the Green Belt have established infrastructure which could be upgraded and extended, these would be expected to have lower levels of abnormal costs. Another eight potential sites in the Green Belt may be able to take access from adjoining roads without the need for major off-site junction improvements. Such physical constraints can be overcome at a cost, but the viability of development may be adversely affected making speculative development too risky. Legal constraints will

typically delay development. In the case of land identified as being temporarily required for the Lower Thames Crossing, these are not expected to be available for development until after 2030.

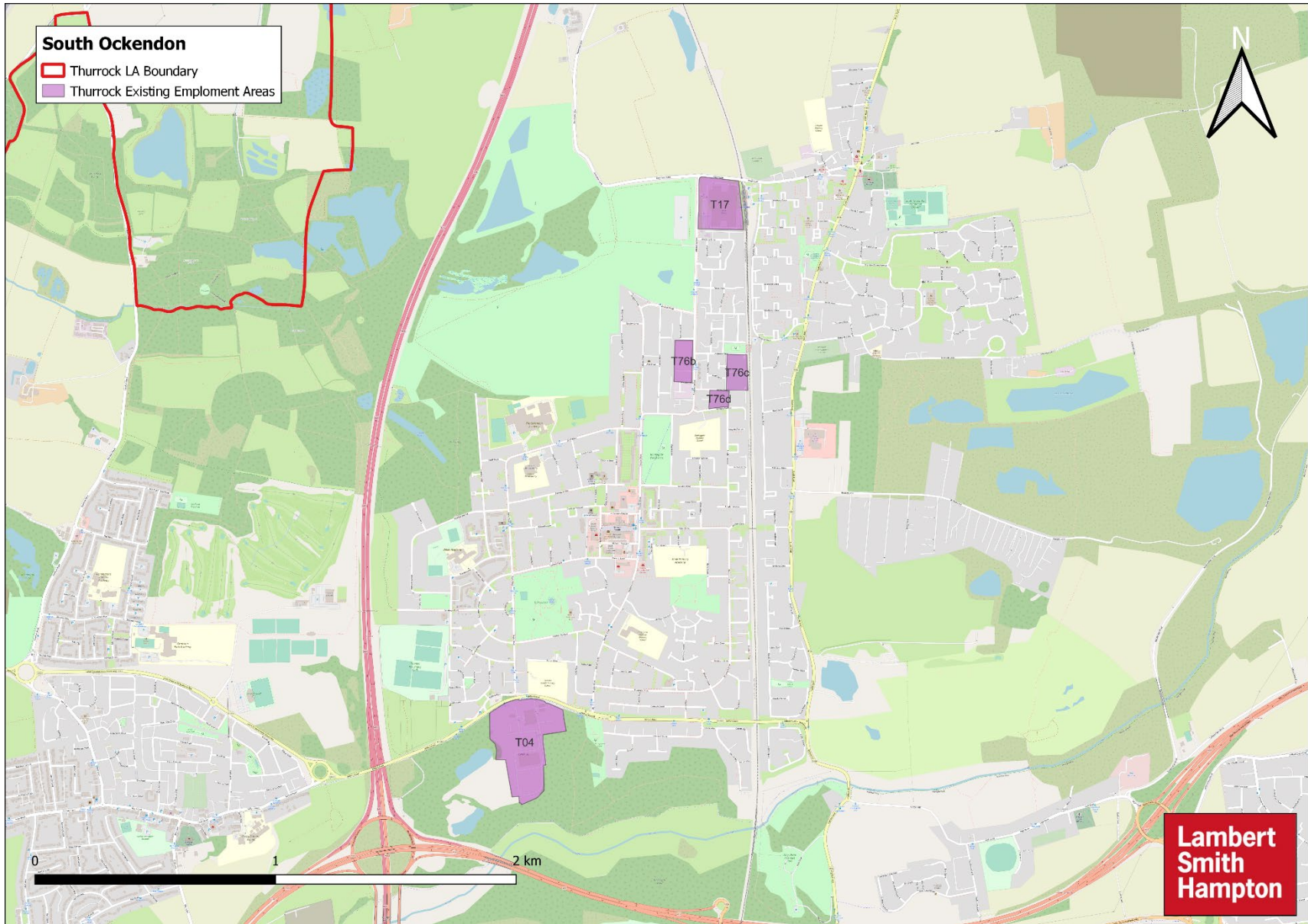
## **APPENDIX 1 - MAPS OF THURROCK'S EMPLOYMENT AREAS**

- 1.1 PORTS
- 1.2 EXISTING EMPLOYMENT AREAS
- 1.3 AVAILABLE EMPLOYMENT SITES
- 1.4 POTENTIAL EMPLOYMENT AREAS



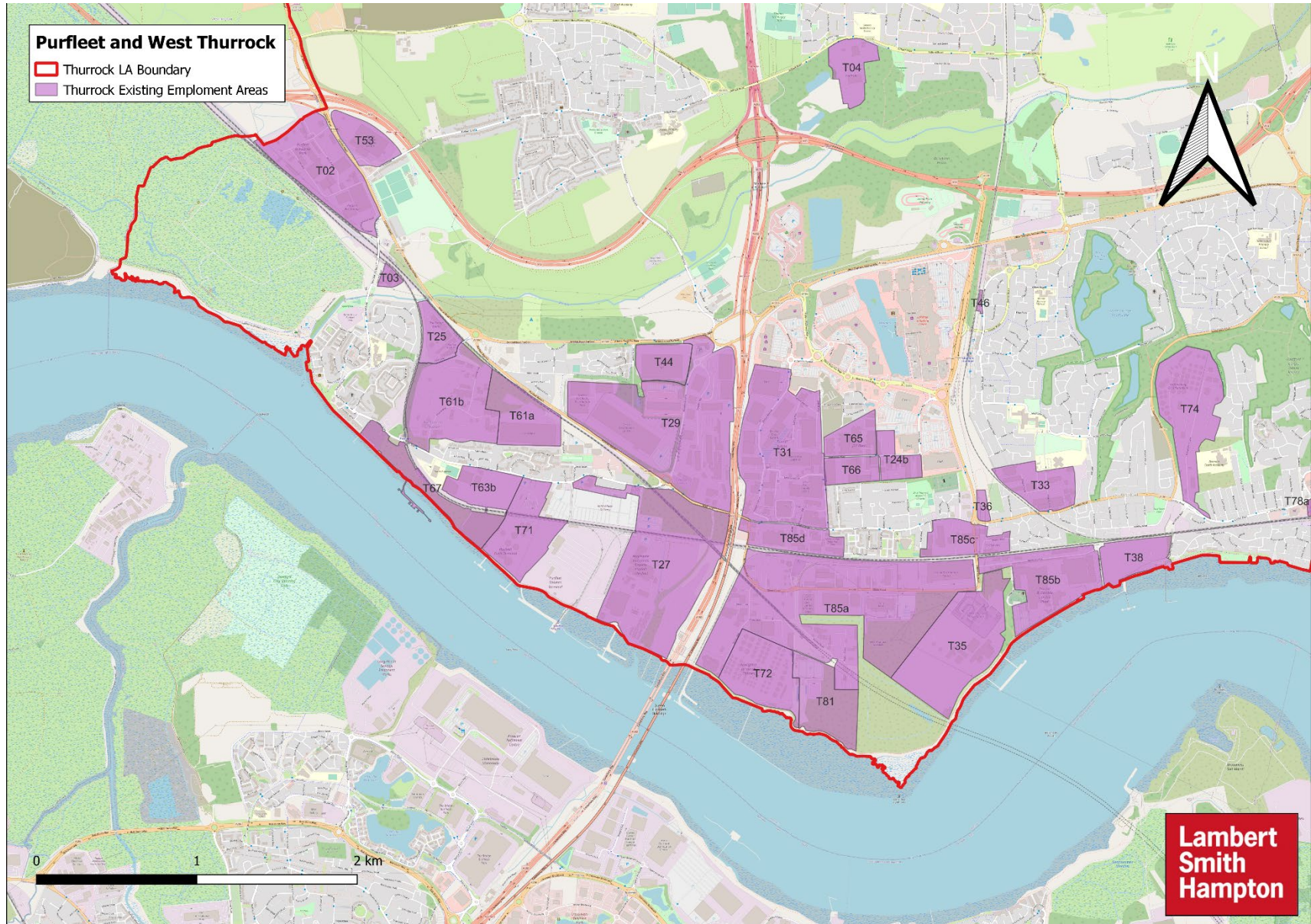




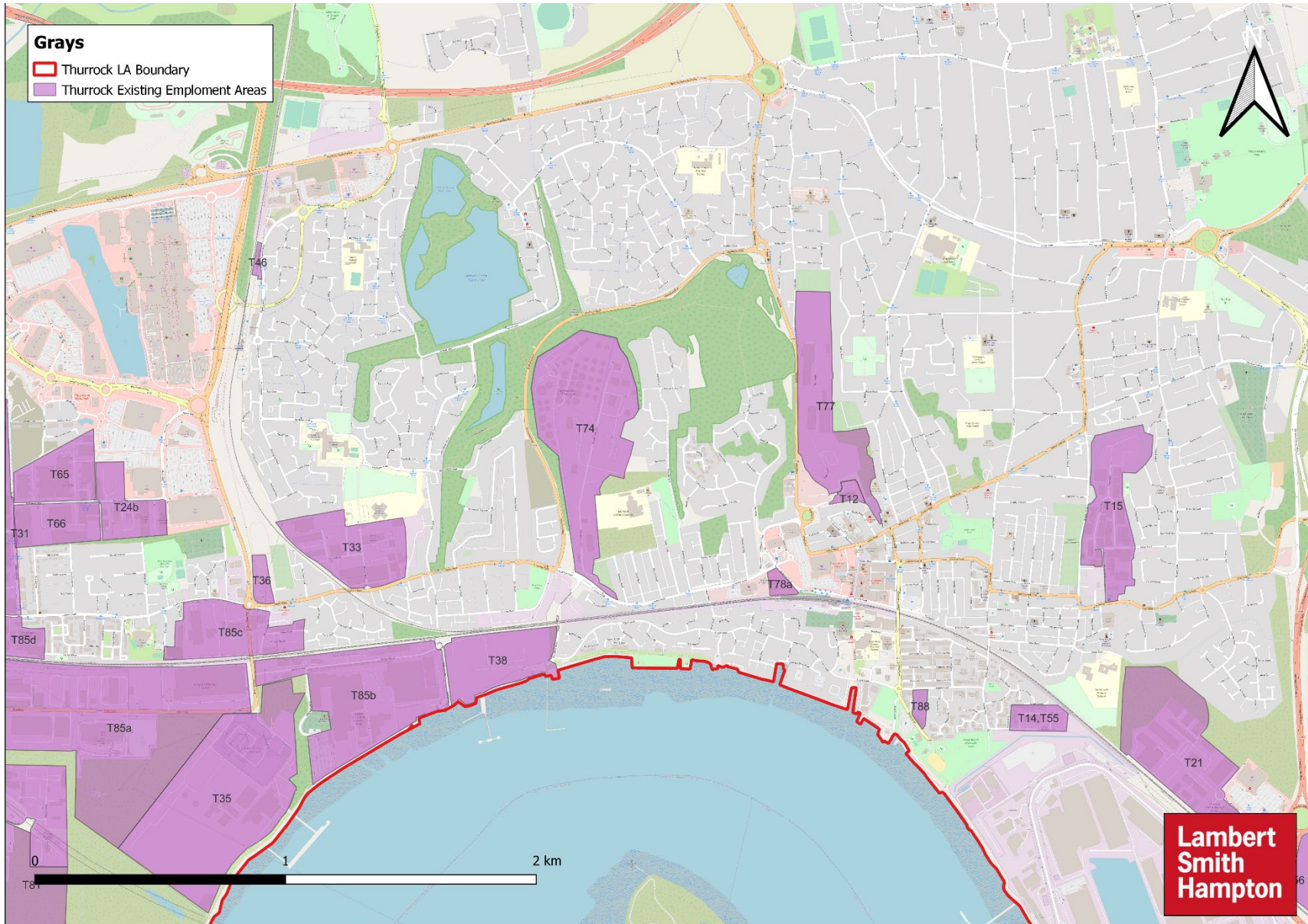


### Purfleet and West Thurrock

- Thurrock LA Boundary
- Thurrock Existing Emploment Areas

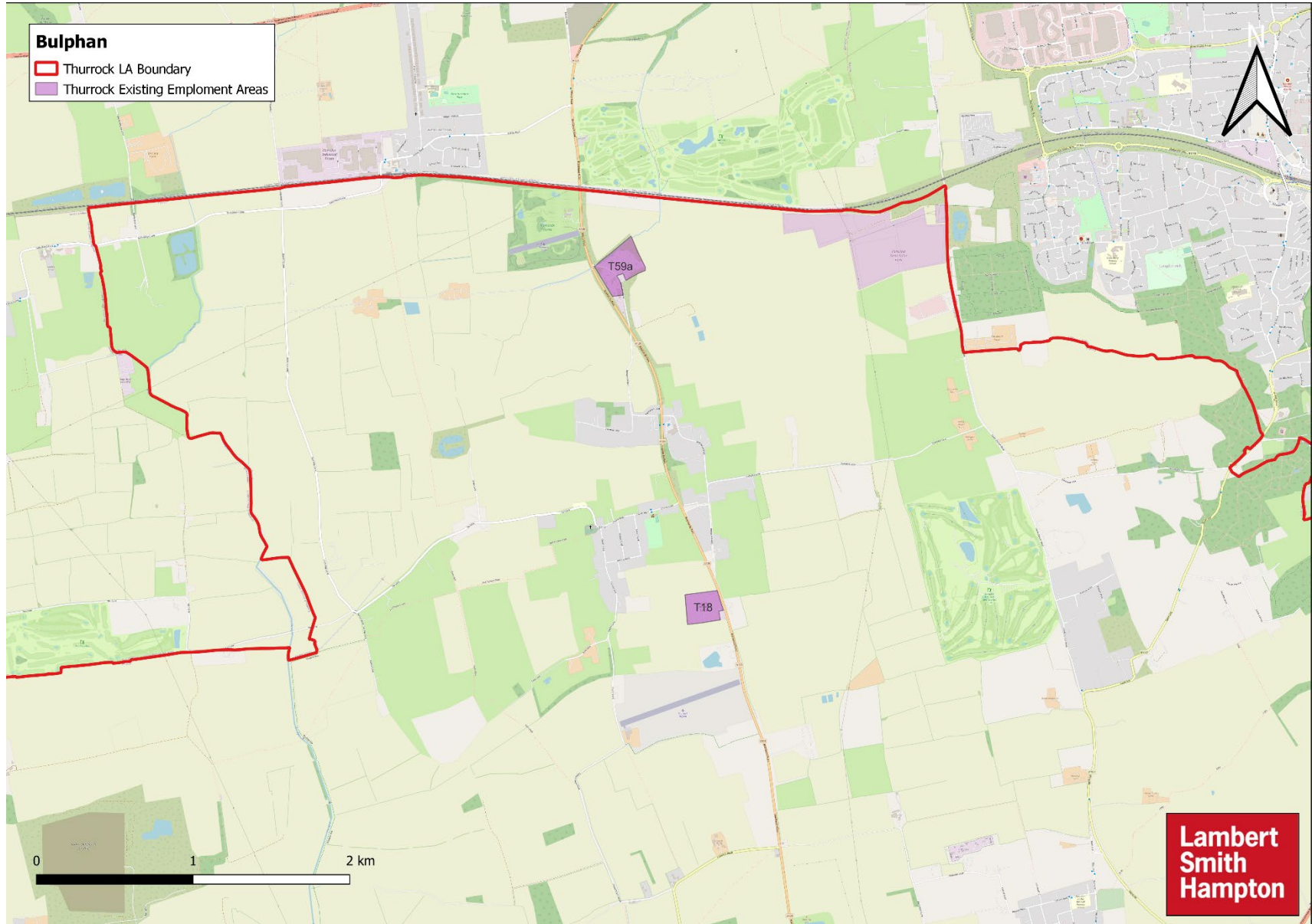


Lambert  
Smith  
Hampton

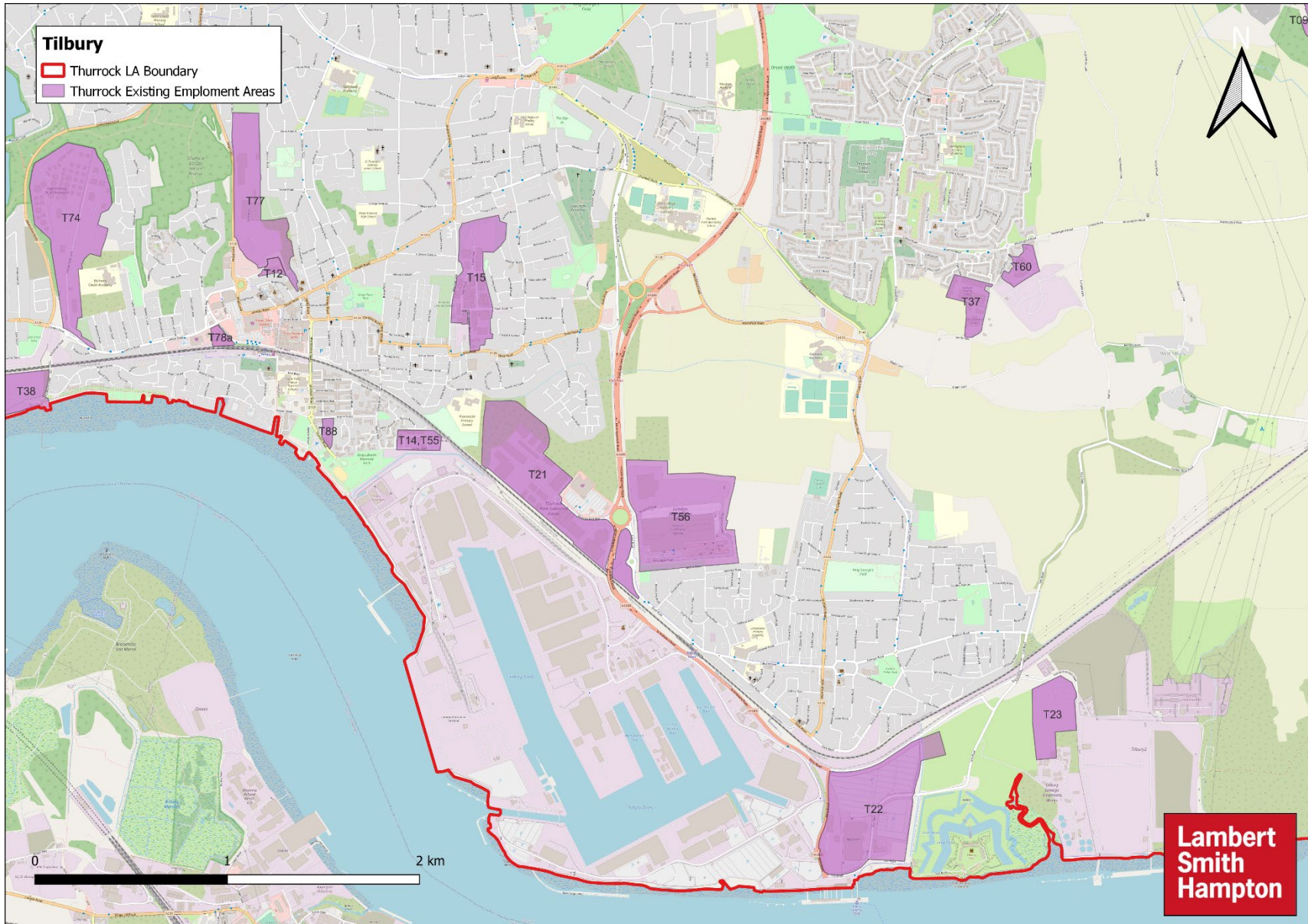


**Bulphan**

- Thurrock LA Boundary
- Thurrock Existing Emploment Areas



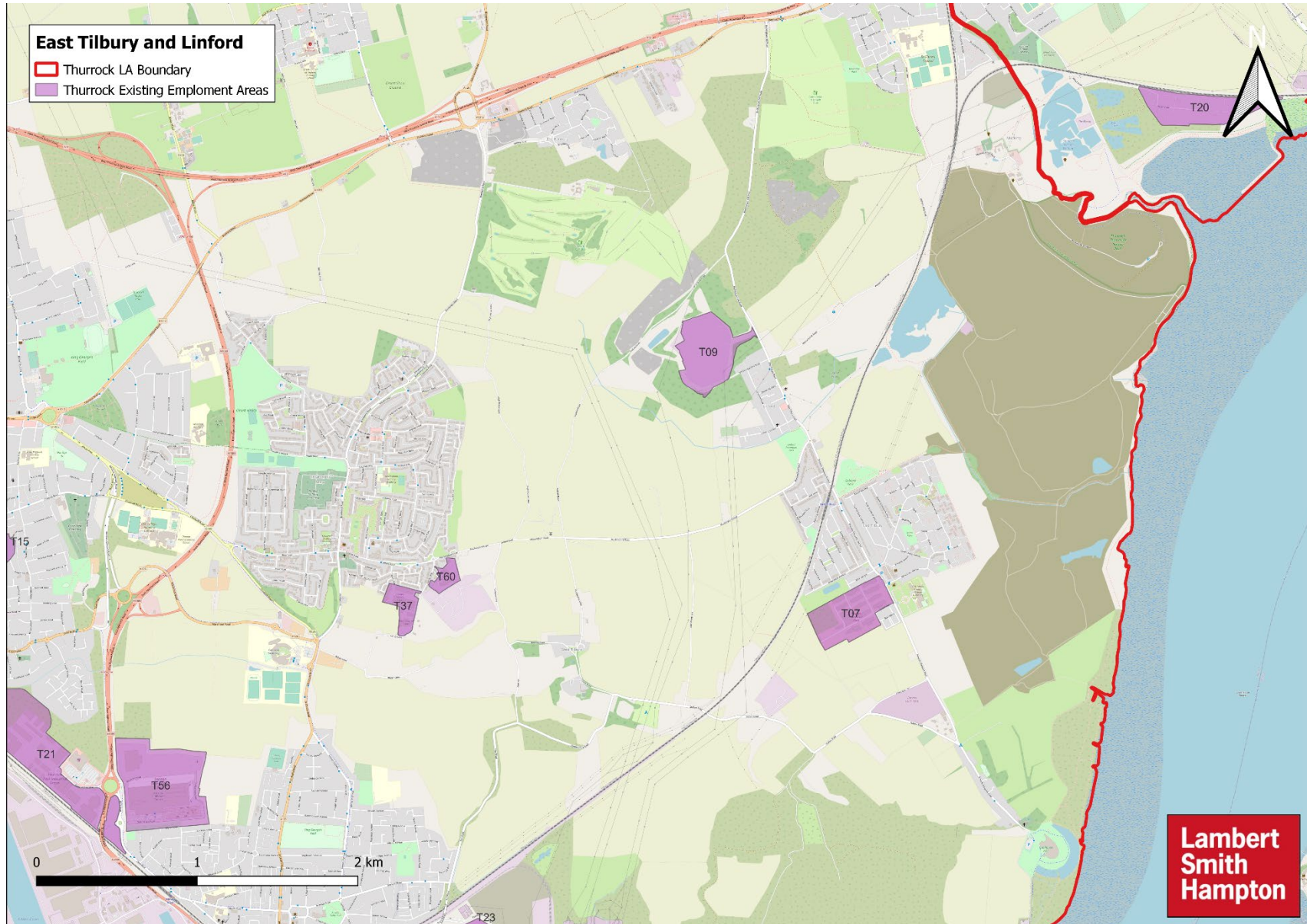
**Lambert  
Smith  
Hampton**



Lambert  
Smith  
Hampton

### East Tilbury and Linford

- Thurrock LA Boundary
- Thurrock Existing Emploment Areas

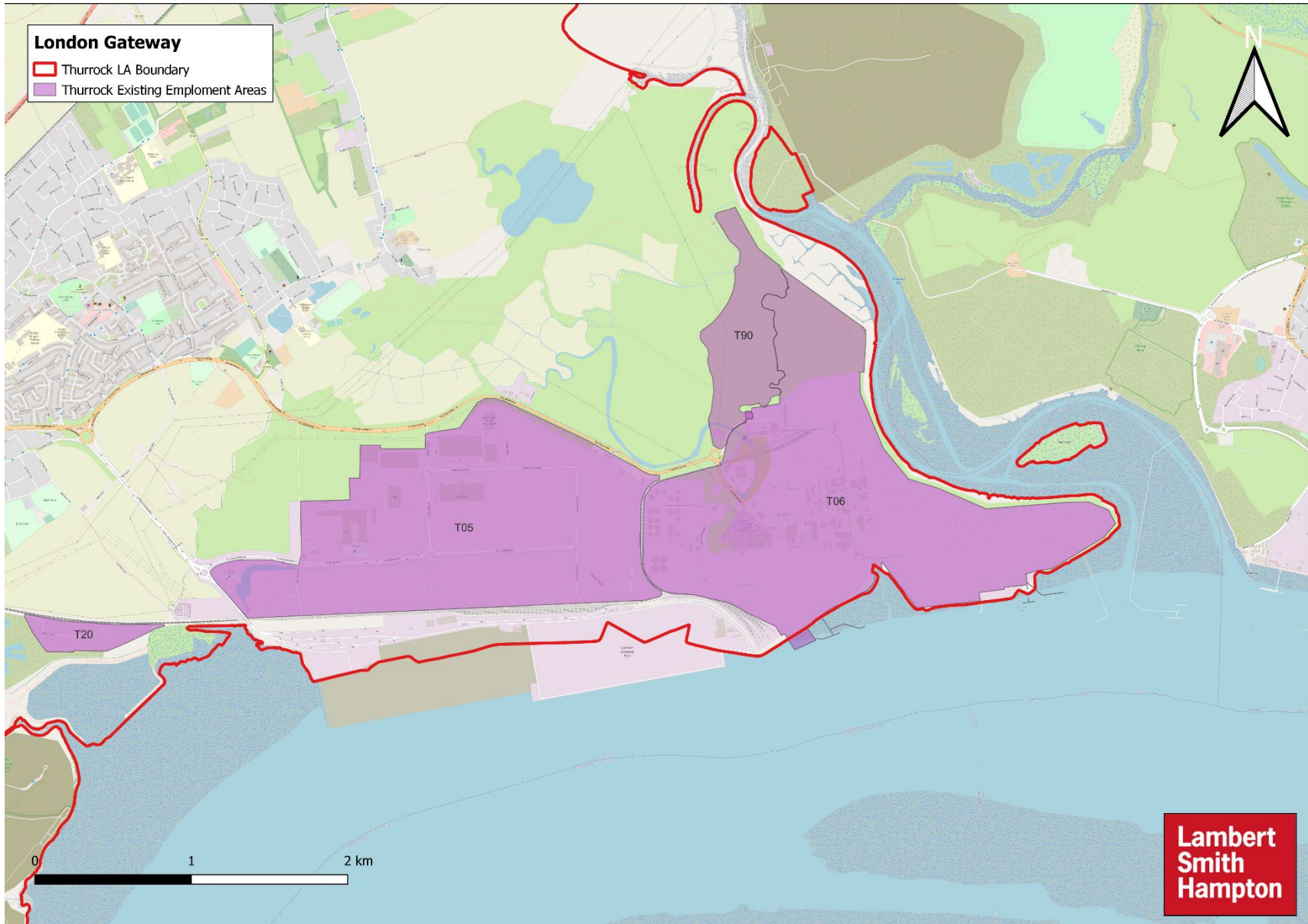


**Stanford-le-Hope**

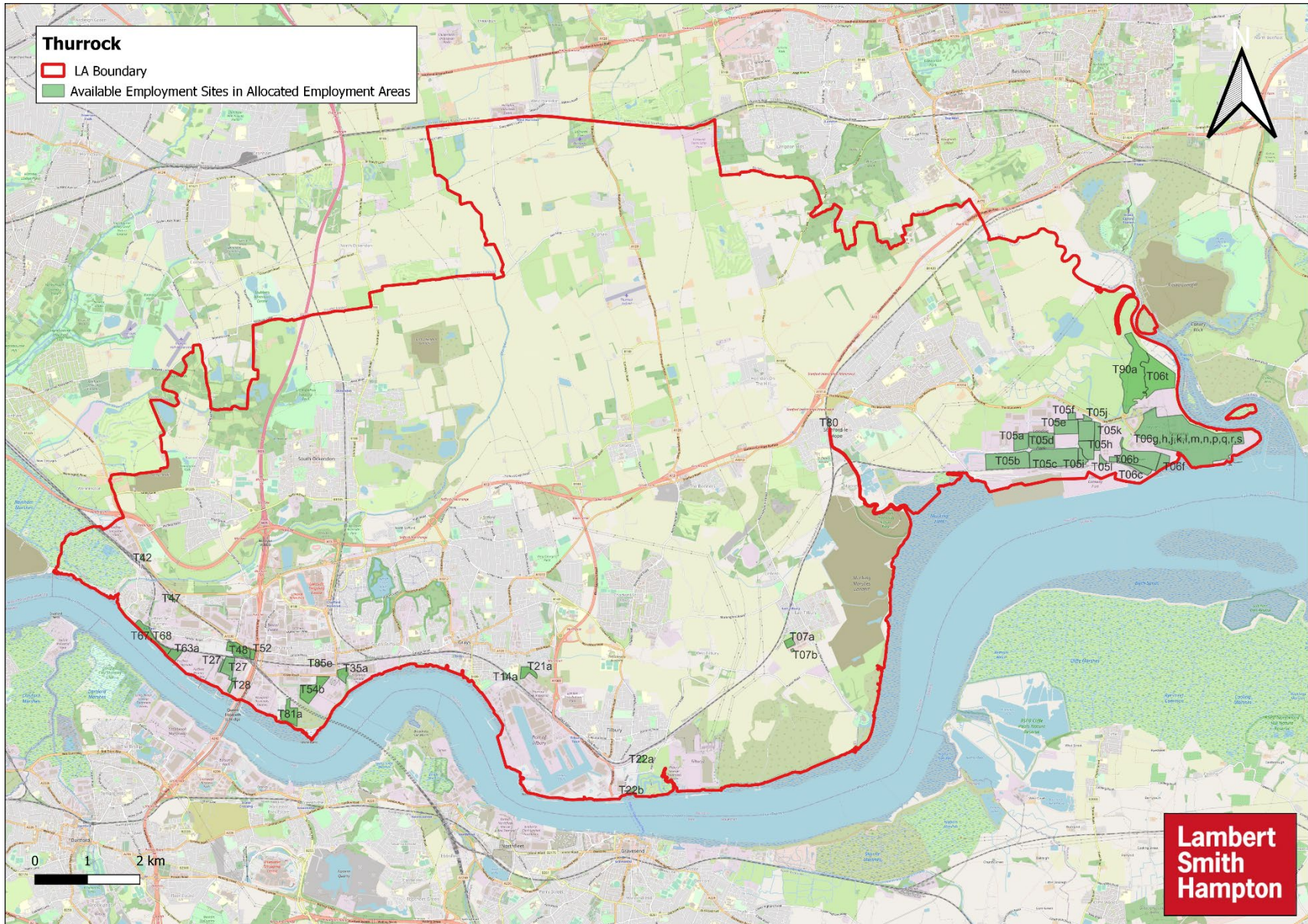
- Thurrock LA Boundary
- Thurrock Existing Emploment Areas



**Lambert  
Smith  
Hampton**

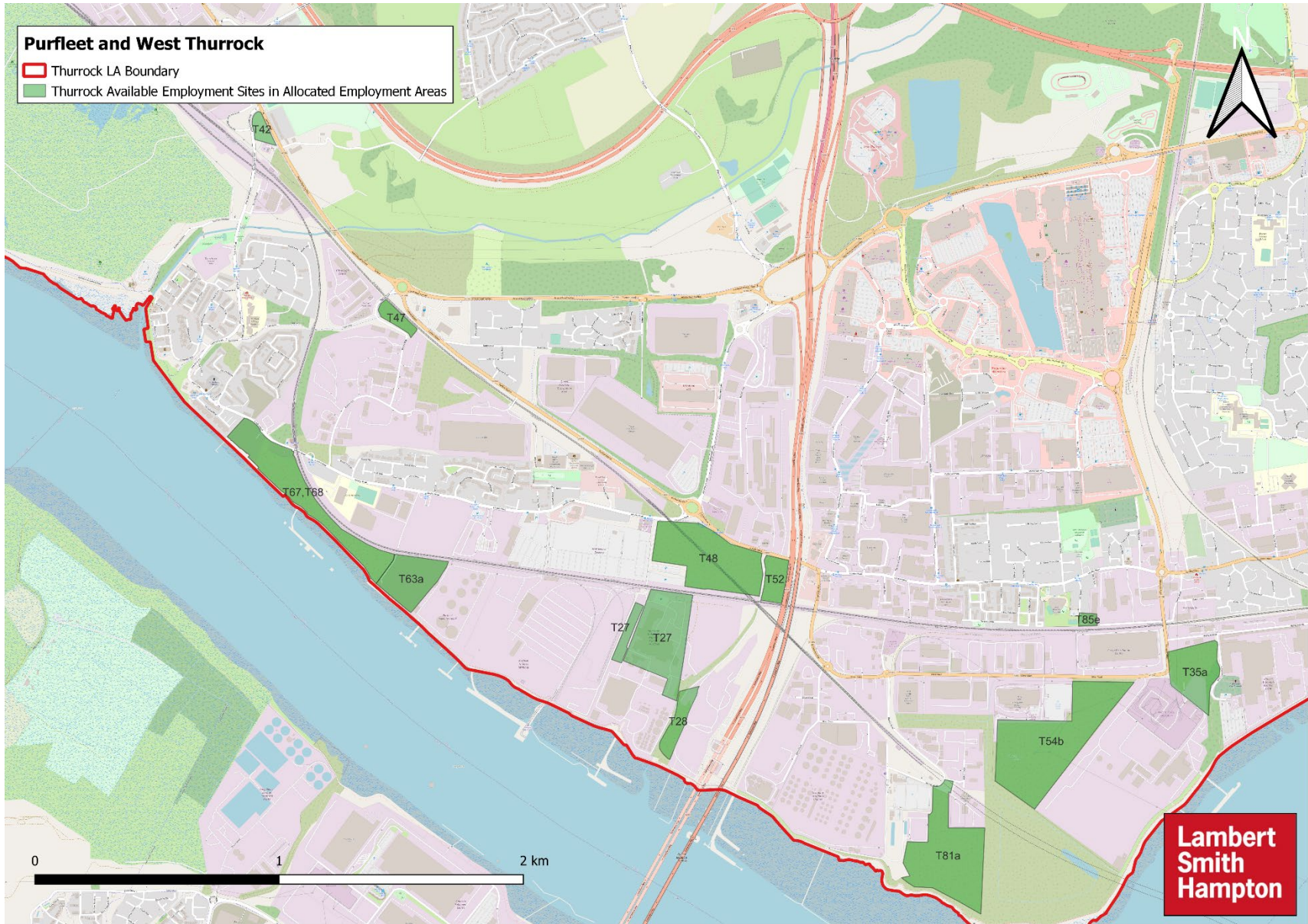






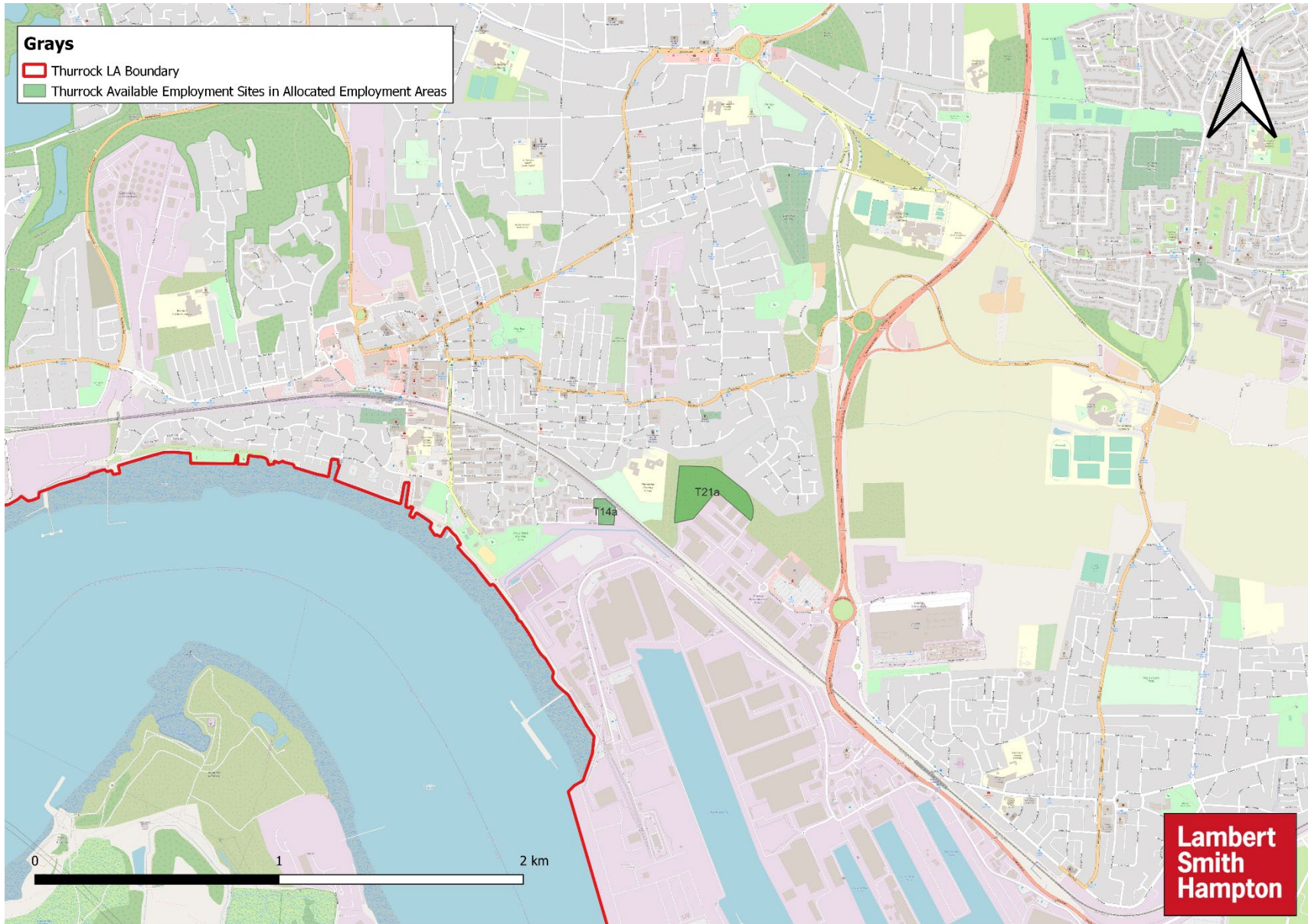
### Purfleet and West Thurrock

- Thurrock LA Boundary
- Thurrock Available Employment Sites in Allocated Employment Areas



**Grays**

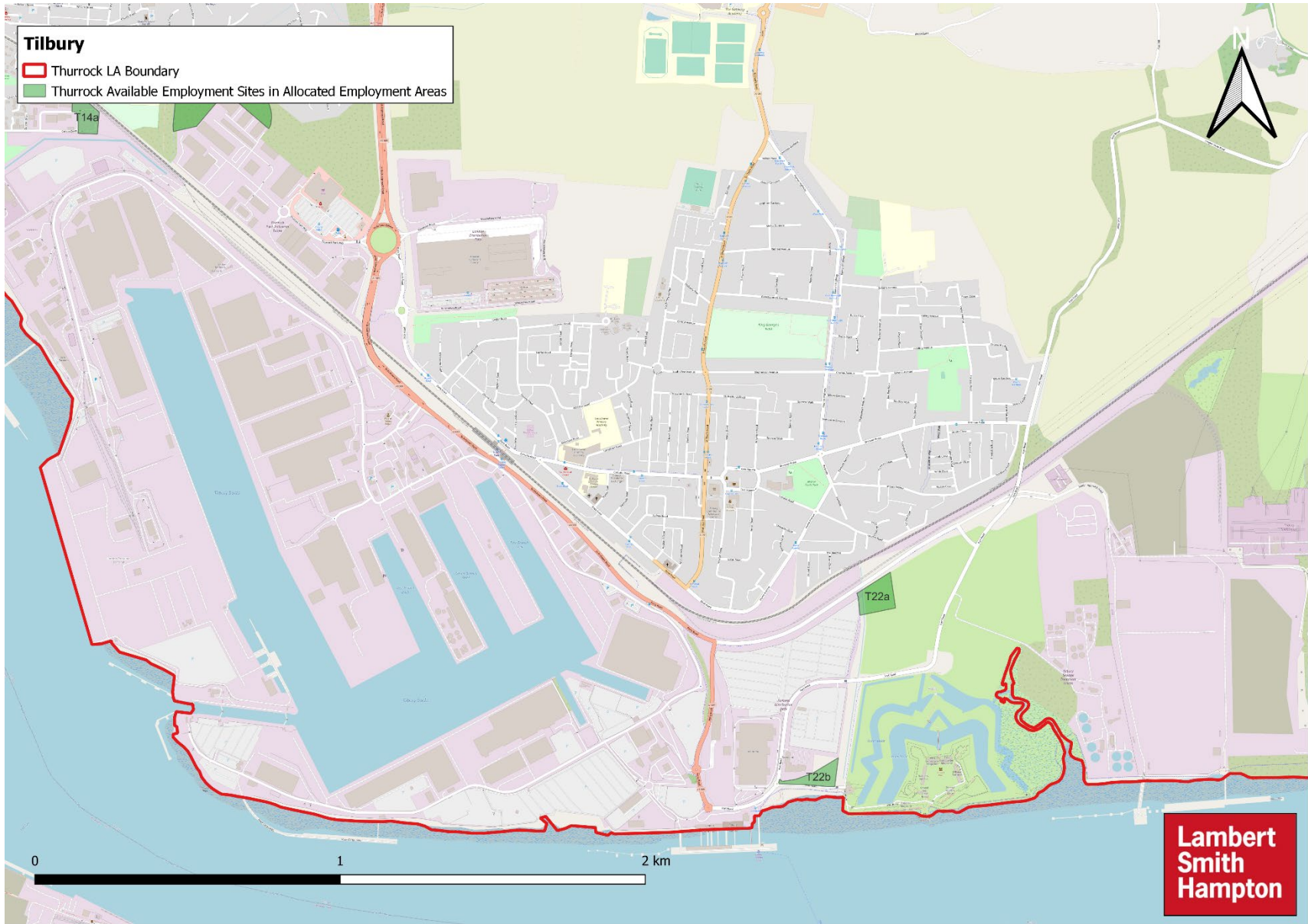
-  Thurrock LA Boundary
-  Thurrock Available Employment Sites in Allocated Employment Areas



**Lambert  
Smith  
Hampton**

**Tilbury**

- Thurrock LA Boundary
- Thurrock Available Employment Sites in Allocated Employment Areas



**Lambert  
Smith  
Hampton**

**East Tilbury**

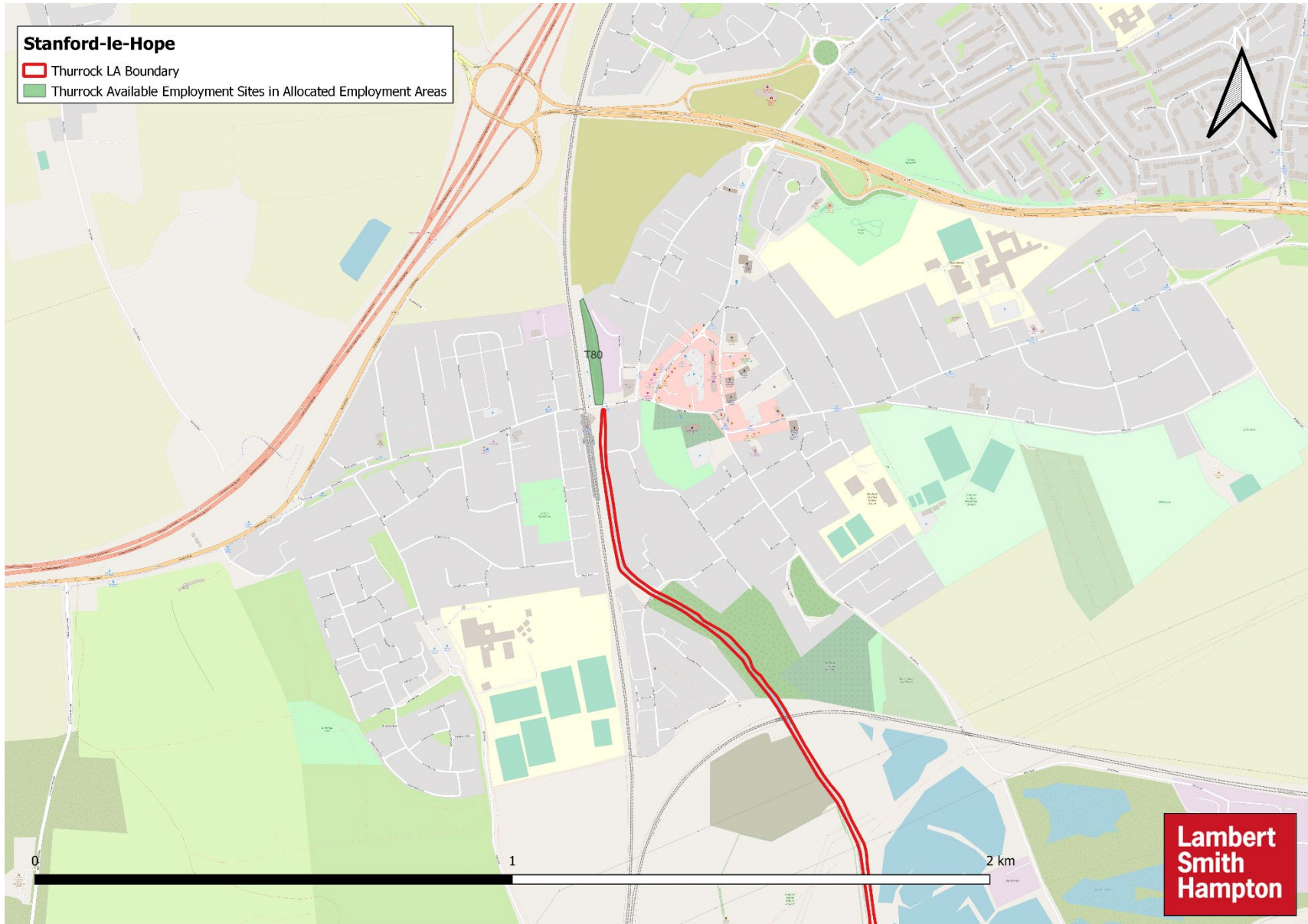
-  Thurrock LA Boundary
-  Thurrock Available Employment Sites in Allocated Employment Areas



**Lambert  
Smith  
Hampton**

**Stanford-le-Hope**

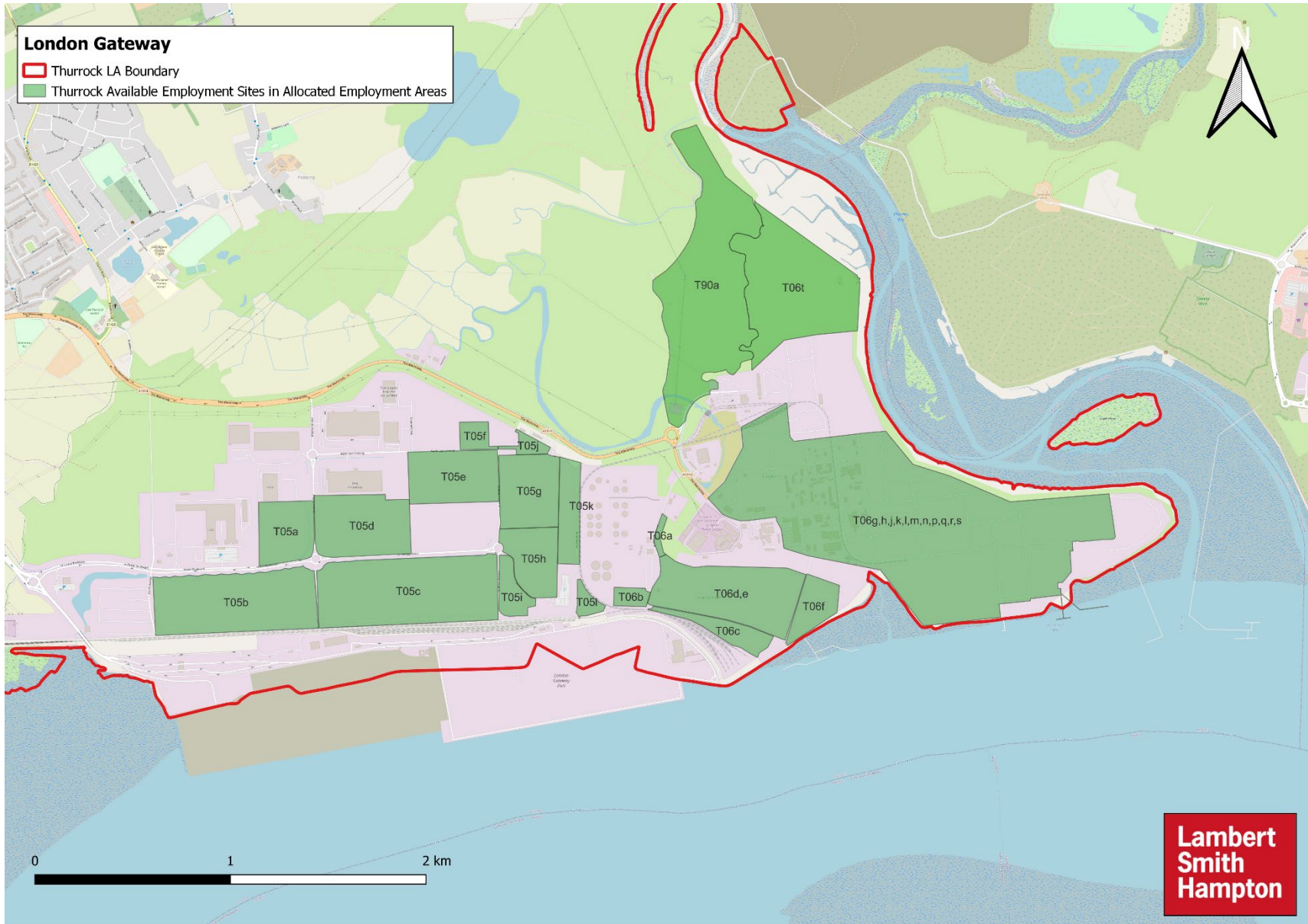
-  Thurrock LA Boundary
-  Thurrock Available Employment Sites in Allocated Employment Areas



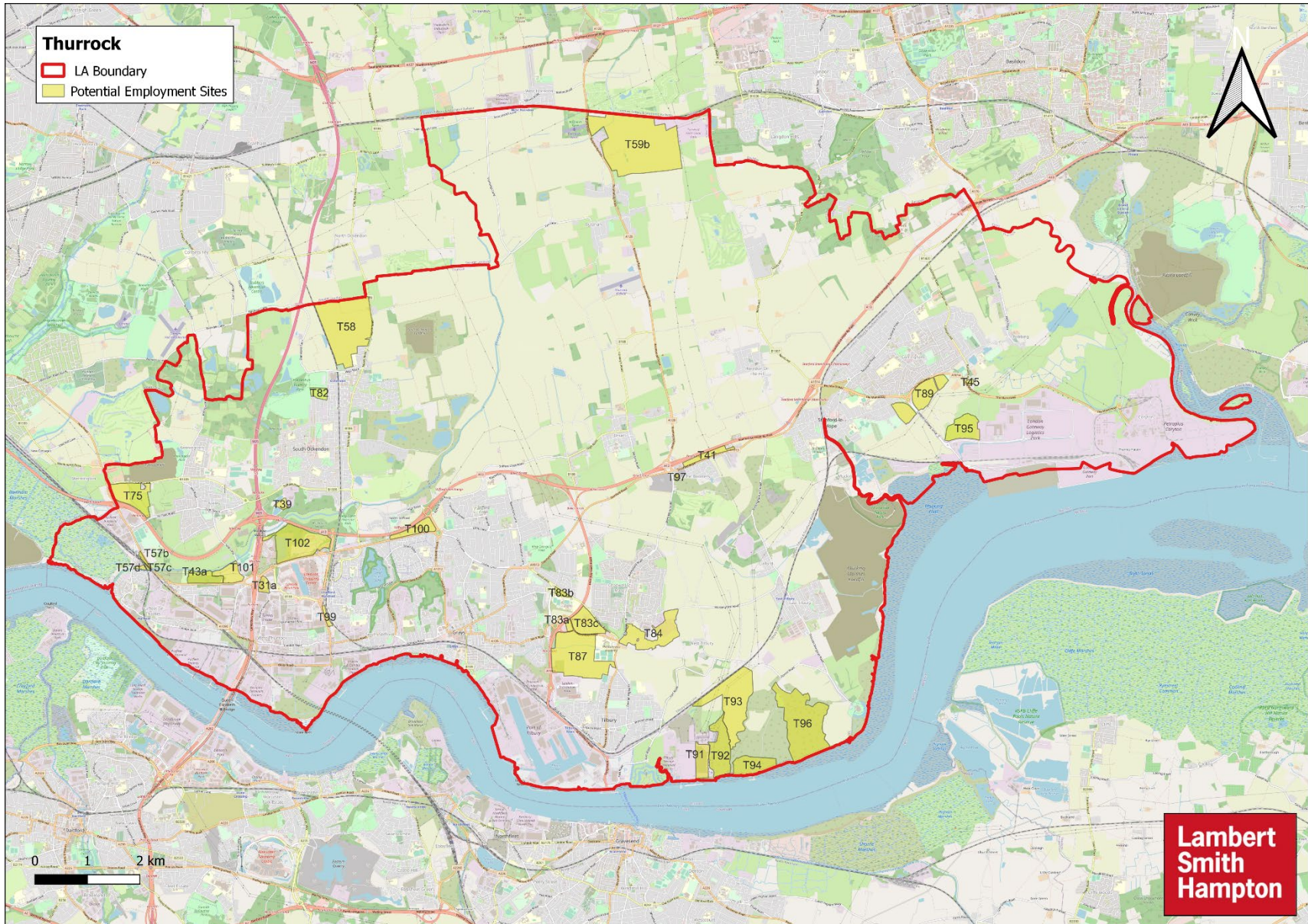
**Lambert  
Smith  
Hampton**

**London Gateway**

- Thurrock LA Boundary
- Thurrock Available Employment Sites in Allocated Employment Areas



**Lambert  
Smith  
Hampton**

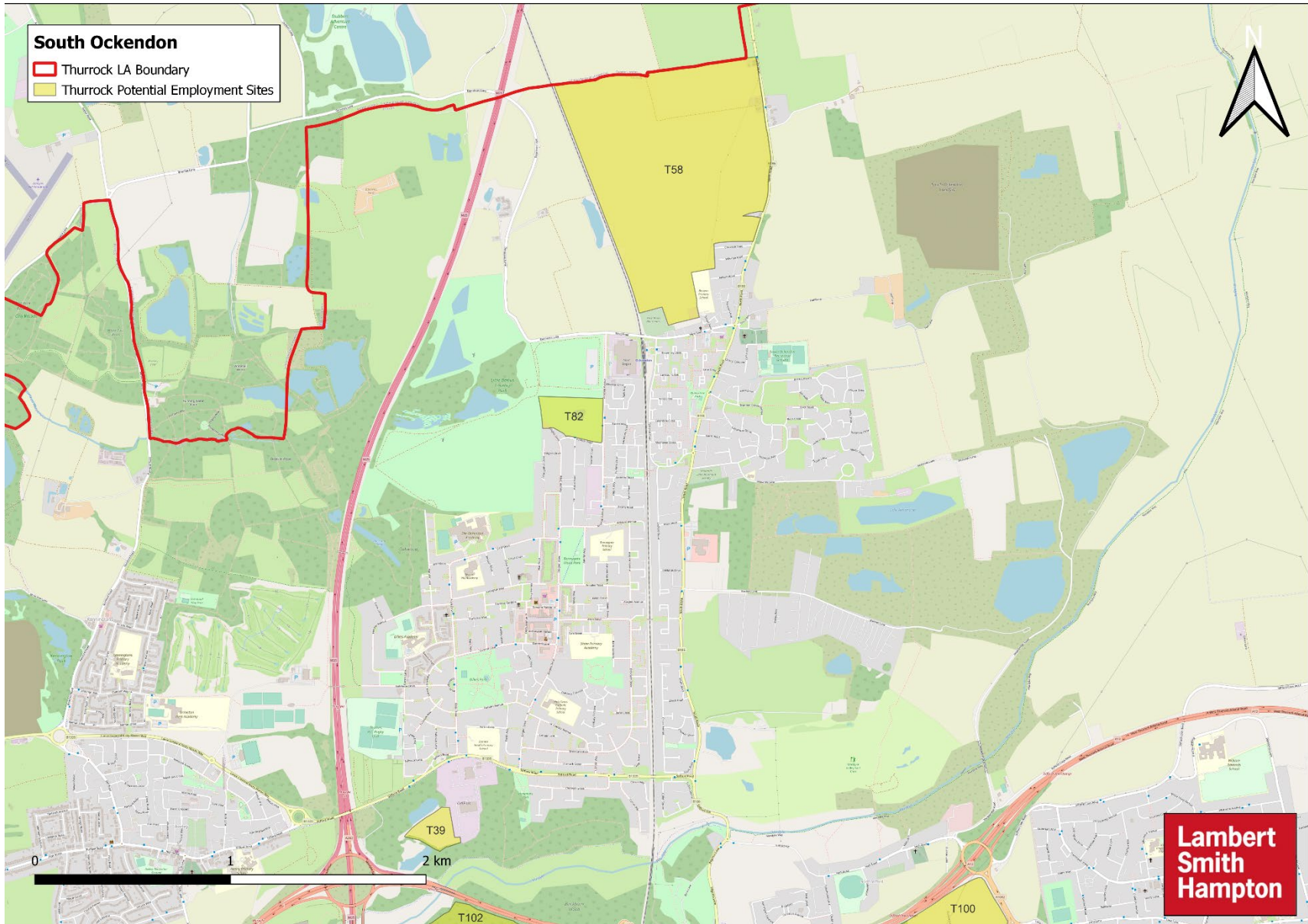


**Thurrock**  
LA Boundary  
Potential Employment Sites

0 1 2 km

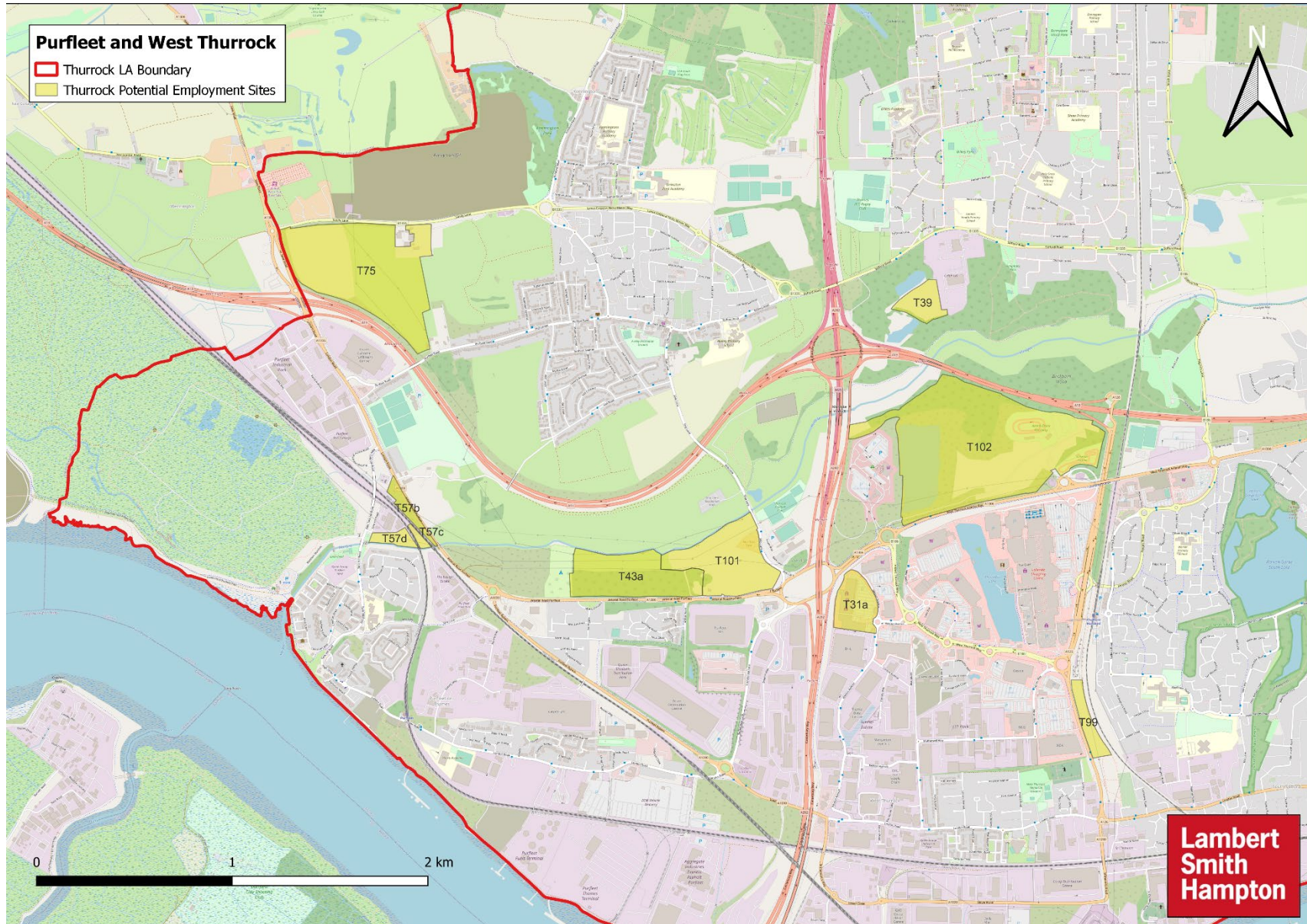
**Lambert  
Smith  
Hampton**



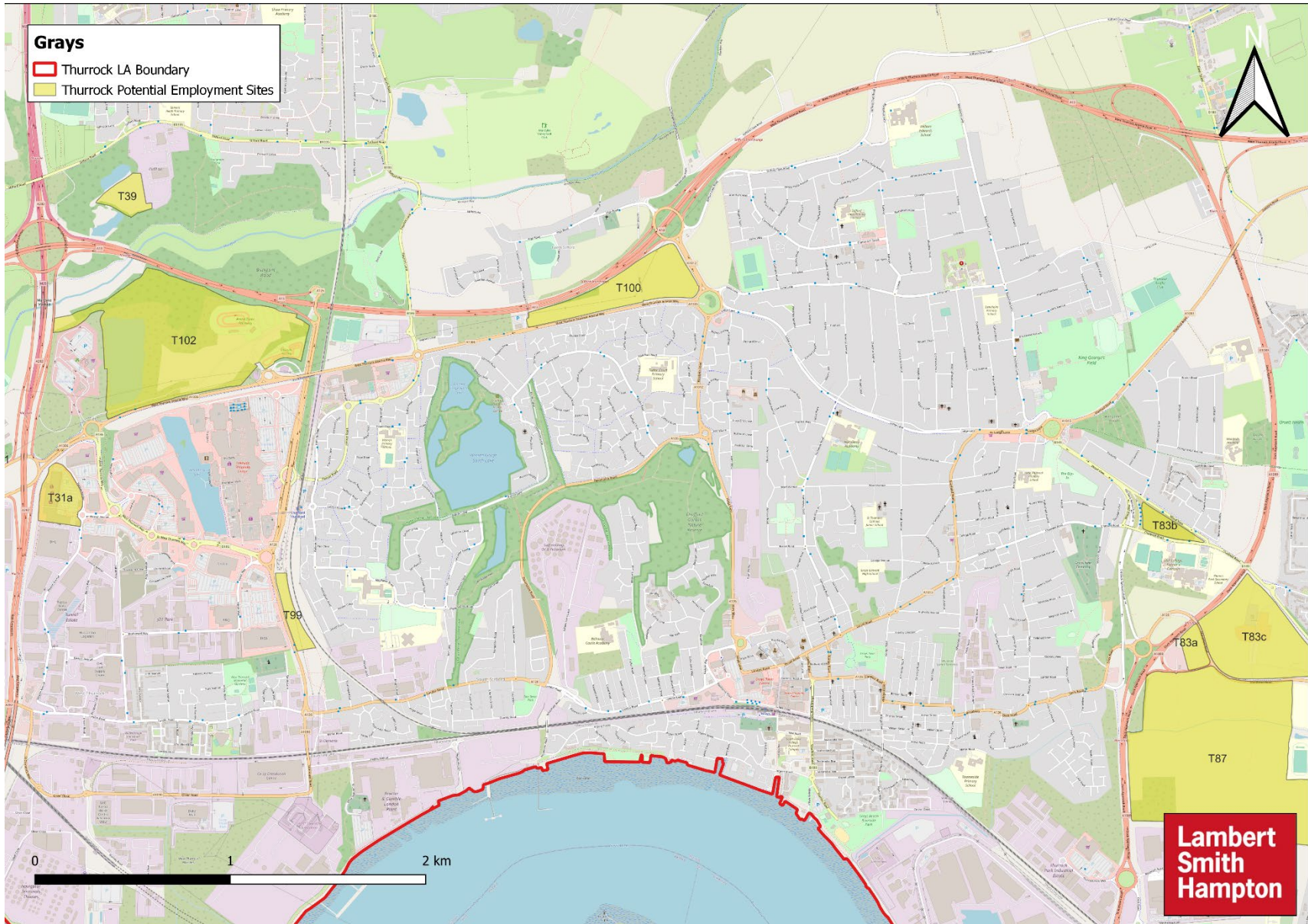


### Purfleet and West Thurrock

- Thurrock LA Boundary
- Thurrock Potential Employment Sites



**Lambert  
Smith  
Hampton**



**Bulphan**

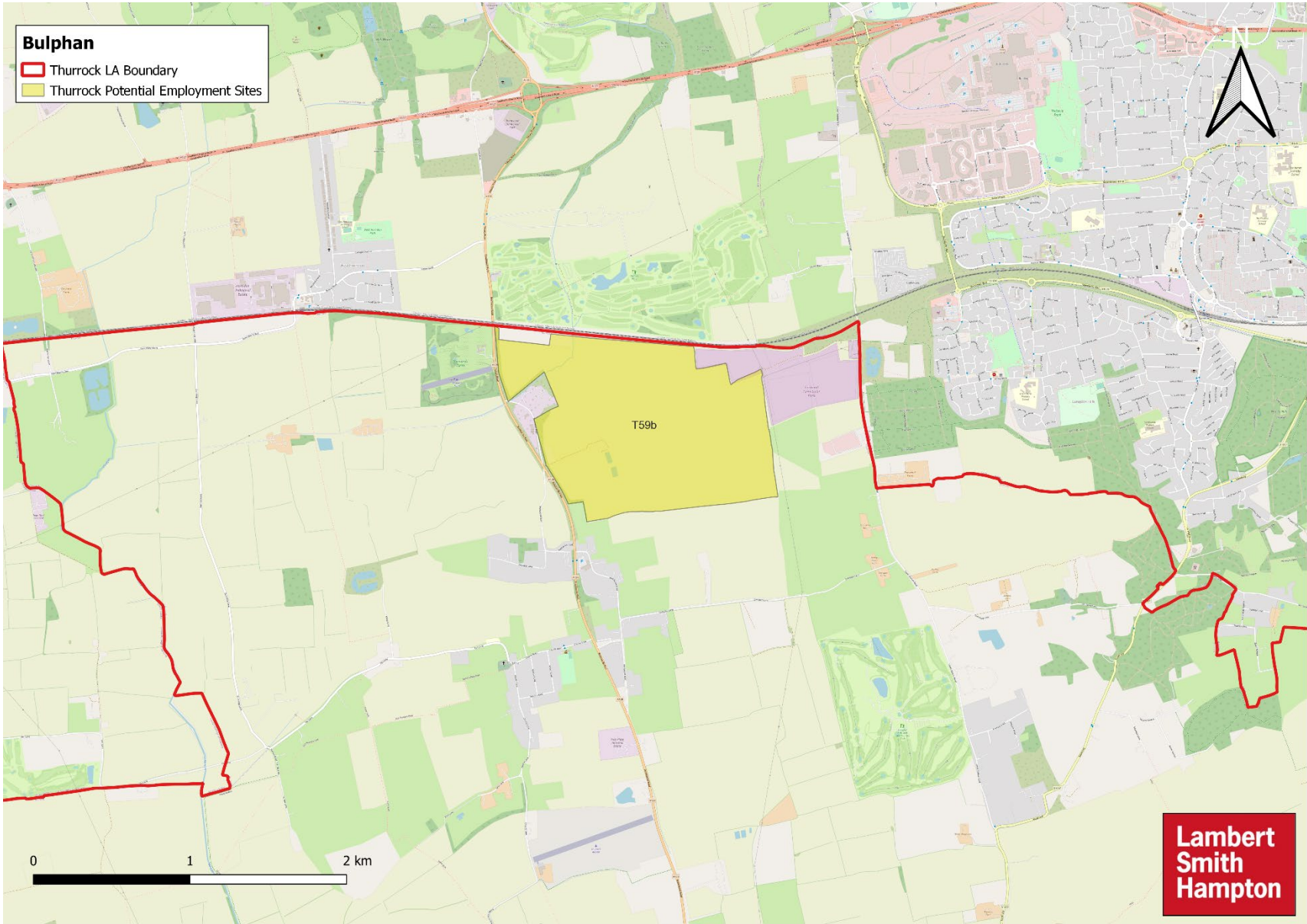
- Thurrock LA Boundary
- Thurrock Potential Employment Sites



T59b

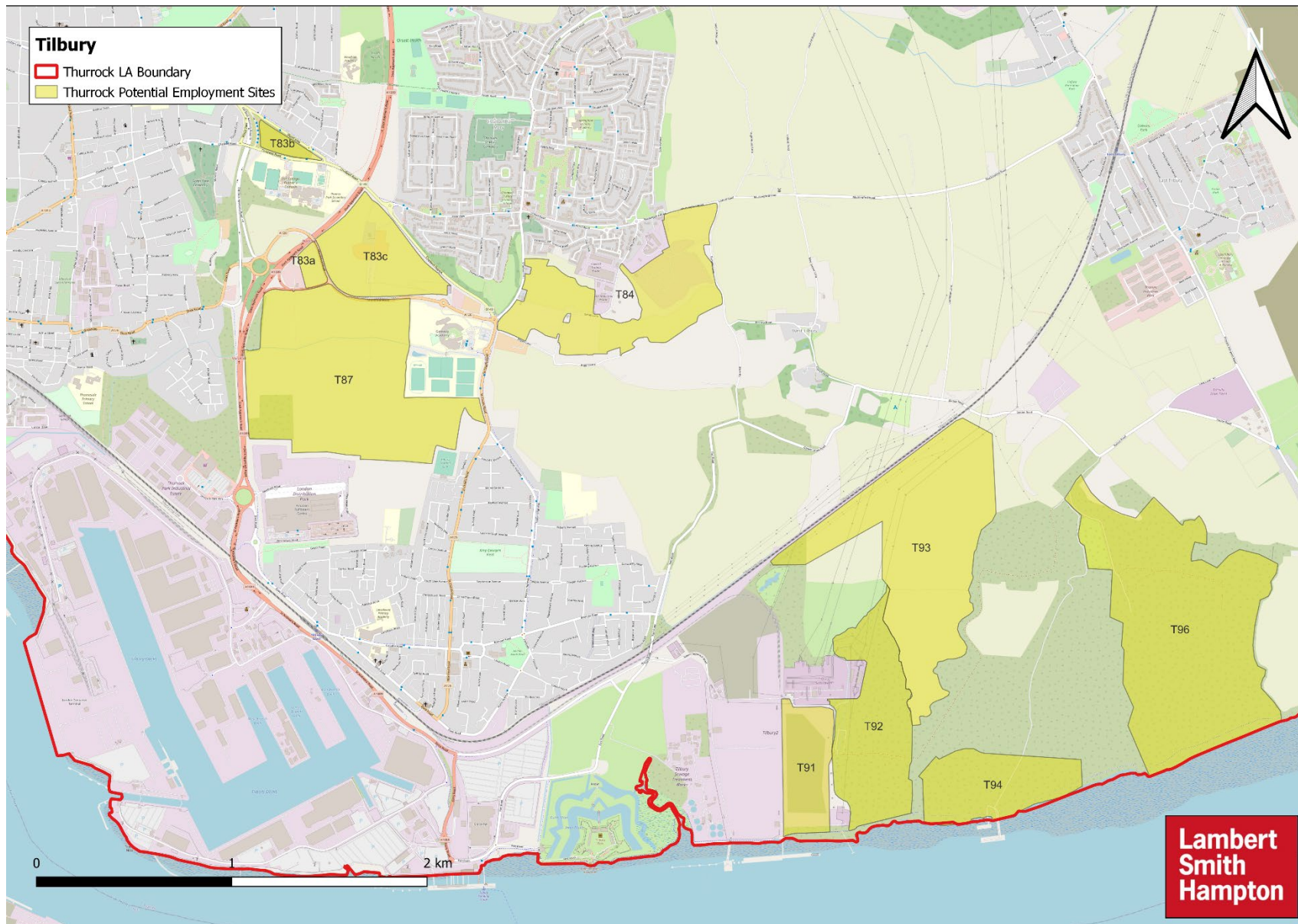


Lambert  
Smith  
Hampton





**Tilbury**

- Thurrock LA Boundary
- Thurrock Potential Employment Sites



**Lambert  
Smith  
Hampton**



### East Tilbury and Linford

-  Thurrock LA Boundary
-  Thurrock Potential Employment Sites



**Lambert  
Smith  
Hampton**

### Stanford-le-Hope and Corringham

-  Thurrock LA Boundary
-  Thurrock Potential Employment Sites



**Lambert  
Smith  
Hampton**

# APPENDIX 2 - MATRIX OF EXISTING EMPLOYMENT AREAS

## ASSESSMENT OF EXISTING EMPLOYMENT AREAS

Site Ref	Employment Area	Location	Site Area (ha)	Employment Designation	Urban / Green Belt	Greenfield / Previously developed	Type	Location	Occupiers	Sectors	Age of Buildings	Quality of Buildings	On Site Amenities	Quality of Environment	Neighbouring Uses	Access to Strategic Highway Network	Internal Circulation / Parking	Vacancies	Recent Development	Potential for Alternative Use	Viability of Employment Development	Available Land (ha)	Additional recommendations and notes
T02	Purfleet Industrial Park, Aveley	Purfleet	25.9	Primary Industrial and Commercial Area	Urban	Previously Developed	General	Industrial	Local / Regional	B2/B8	1950s-80s	Poor/Good	No	Poor	Industrial	Good	Very poor	No	No. Some expansion of yards	Limited	Medium		Estate investment strategy required. Includes T01. North western edge extends beyond borough. Southeastern tip now part of potential employment area T57.
T03	Milehams Industrial Estate, Purfleet	Purfleet	1.4	Secondary Industrial and Commercial Area	Urban	Previously Developed	General	Industrial	Local	Eg/B2/B8	1950s	Poor	No	Poor	Rail & roads	Good	Poor	No	No	Limited	Medium		Estate investment strategy required. Overhead power line may restrict future redevelopment for highbay warehousing.
T04	Hangmans Wood Industrial Estate, Stifford Road, South Ockendon	South Ockendon & Aveley	8.3	Major Developed Site in Green Belt	Green Belt	Previously Developed	Distribution	Edge of town	Local	B8	1980s	Average	No	Good	Agricultural	Poor	Good	No	No	Limited	Medium		Estate has been extended to south and west into Green Belt. Estate investment strategy required. Overhead power line may restrict future redevelopment for highbay warehousing.
T05	London Gateway	Stanford-le-Hope	258.4	Primary Industrial and Commercial Area	Urban	Previously Developed	Distribution	Industrial	National/International	B8	2015-2022	Good	No	Good	Port / Tank farm	Good	Good	No	Yes	Limited	Strong	117.12	Phased redevelopment of vacant areas being promoted by developer. Includes T05c.
T06	Thames Enterprise Park and Coryton Refinery	Stanford-le-Hope	309.8	Primary Industrial and Commercial Area	Urban	Previously Developed	Bad Neighbour	Industrial	National	sui generis	1950s	Poor	No	Poor	Power Station	Poor	Average	Yes	No	Limited	Medium	146.10	Brownfield site of oil refinery. Suit low value storage or recycling uses.
T07	Thames Industrial Estate, Princess Margaret Road, East Tilbury, RM18 8RH	Tilbury	12.7	Secondary Industrial and Commercial Area	Urban	Previously Developed	General	Commercial / Residential	Local	B2/ B8/ yards	1930s	Very poor	No	Very poor	Residential	Poor	Good	Yes, not on market	No	Potential for residential/	Weak	2.97	Low levels of occupancy is evidence of weak demand. Heritage value.
T09	Durox Works, Linford	Tilbury	14.5	Major Developed Site in Green Belt	Green Belt	Previously Developed	Special	Industrial	National	Aggregates	1950s	Average	No	Average	Agricultural	Poor	Good	No	No	Limited	Medium		Single occupier, if vacated, demand for continued employment use to be tested by marketing.
T12	Grays Town Centre North	Grays	0.8	Secondary Industrial and Commercial Area	Urban	Previously Developed	Distribution	Industrial	National / Local	Royal Mail Delivery office	2010s	Good	No	Average	Commercial & residential	Poor	Good	No	Yes	Limited	Medium		Industrial site redeveloped as delivery office and army and air cadet premises.
T14 & T55	Manor Way Industrial Estate, Curzon Drive, Grays	Grays	2.3	Secondary Industrial and Commercial Area	Urban	Previously Developed	General	Commercial / Residential	Local	Eg/B2/B8	1950s	Poor	No	Average	Residential & Port	Poor	Good	2 plots	No	Potential for residential	Weak	0.66	Eastern part of estate has been cleared, access is through housing area. Suitable for residential redevelopment.
T15	Globe Works, Little Thurrock (Retained)	Grays	11.3	Secondary Industrial and Commercial Area	Urban	Previously Developed	General	Commercial / Residential	Local	B2/B8/ Scrap	1970s-2010s	Poor/Good	No	Poor	In Chalk pit. Resi	Good	Average	No	Yes	Limited	Medium		Estate investment strategy required.
T17	Next Warehouse, Aveley Industrial Estate, South Ockendon (Part retained)	South Ockendon & Aveley	3.7	Secondary Industrial and Commercial Area	Urban	Previously Developed	Distribution	Commercial	National	B8	2000s	Good	No	Good	Rail & resi	Average	Good	No	No	Limited	Medium		Single occupier, if vacated, demand for continued employment use to be tested by marketing. Secondary logistics location that would benefit from new motorway to LTC.
T18	Wick Place Farm Industrial Estate, Brentwood Road, Bulphan. RM14 3TL	Bulphan	3.8	Developed - Green Belt	Green Belt	Previously Developed	General	Rural	Local	B2/hire	1950s	Poor	No	Poor	Agricultural	Poor	Poor	No	No	Limited	Medium		
T20	Stanhope Industrial Park, Stanford-le-Hope	Stanford-le-Hope	11.6	Secondary Industrial and Commercial Area	Urban	Previously Developed	General	Rural	Local	Scrap / car repair	1950s-2010s	Poor / Good	No	V Poor	Agricultural	Poor	Poor	No	Yes - compound	Limited	Medium		Estate investment strategy required. Includes T19 & T40
T21	Thurrock Park, Little Thurrock	Tilbury	21.4	Primary Industrial and Commercial Area	Urban	Previously Developed	General	Commercial	International / Local	B2/B8	2000s	Good	Snack van	Average	Port	Good	Average	No. Land to NW	Yes	Limited	Strong	4.46	Provide infrastructure to enable development of land to north-west
T22	Tilbury South	Tilbury	25.3	Primary Industrial and Commercial Area	Urban	Previously Developed	General	Commercial	International / Local	B2/ B8/ yards	2000s	Good	No	Good	Port	Good	Good	1x compound	Yes - business centre	Limited	Strong	2.23	Not Port operational land. Includes Fortress Distribution Park and Riverside Business Centre
T23	Esken Renewables, Fort Lane, Tilbury	Tilbury	6.8	None	Urban	Previously Developed	Compounds	Industrial	National	B8	N/A	N/A	No	Average	Port / Sewage Treatment Works	Average	Good	No	No	Limited	Medium		Used for external storage of biomass.
T24b	Motherwell Way, West Thurrock	West Thurrock	6.0	Primary Industrial and Commercial Area	Urban	Previously Developed	General	Commercial	National / Local	B2/ B8/ trade	1970s-2000s	Poor / Good	No	Average	Retail/ Resi/ Ind	Good	Average	2 x ind units	Yes	Potential for commercial use	Strong		
T25	Ensign Industrial Estate, Tank Lane, Purfleet	Purfleet	6.6	Primary Industrial and Commercial Area	Urban	Previously Developed	General	Commercial	National / Local	B8	1930s-2022	Poor / V Good	No	Average	Industrial	Good	Average	No	Yes - 6 spec units	Limited	Strong		
T27	London Road, Purfleet	Purfleet	51.9	Primary Industrial and Commercial Area	Urban	Previously Developed	General	Industrial	International	B2/ B8	1950s	Average	No	Average	Port / Industrial	Average	Average	Cleared plots	No	Limited	Medium	18.82	Estate investment strategy required. Includes T28, T48 & T52. Excludes Port
T29	Dolphin Estate/Lafarge, West Thurrock	Purfleet	61.9	Primary Industrial and Commercial Area	Urban	Previously Developed	Distribution	Industrial	National	B2/B8	1950s-2010s	Average to Good	No	Good	Industrial/roads	Very Good	Good	No	Yes	Limited	Strong		
T31	Lakeside/ Waterglade Industrial Estates, West Thurrock	West Thurrock	45.2	Primary Industrial and Commercial Area	Urban	Previously Developed	Distribution	Commercial	National / International	B8	1950s-2000s	Average - V Good	Yes	Average/good	Ind/ Resi to east	V Good	Average	Yes,	Yes	Limited	Strong		Review boundary to incorporate T30 & terrace of units to the east on Motherwell Way.
T33	Magnet Industrial Estate, 434-436 London Road, West Thurrock	West Thurrock	10.7	Secondary Industrial and Commercial Area	Urban	Previously Developed	General	Commercial	National / Local	B2/ B8 / bus depot	1990s	Good	No	Average	Residential	Average	Average	2 terraced units	Yes	Limited	Medium		Review boundary to exclude primary school - consider incorporating vacant/ scrap land to the eastern boundary.
T35	Industrial Chemicals Limited, West Thurrock Works, Stoness Road, West Thurrock	West Thurrock	36.1	None	Urban	Previously Developed	Specialist	Industrial	International	Chemical	1970s- 2010s	Average-good	Yes	Average	Industrial / Specialist	Good	Good	Underused land to south. Vacant plot	No	Limited	Medium	3.90	Single user consolidating its operations in Thurrock onto this site.
T36	Harris Commercial, Former Burma Oil Depot, 506-512 London Road, West Thurrock	West Thurrock	1.2	None	Urban	Previously Developed	Truck & van sales	Commercial	National	Truck & van sales	1970s - 2020s	Good	No	Average	Residential	Good	Average	No	Yes	Potential for commercial use	Medium		Operations have extended onto land to the north and subsequent planning consent was granted for redevelopment of whole area. Consider allocation as a commercial mixed-use site or include within wider employment area between London Road and railway (T85).
T37	Star Industrial Estate, Linford Road, Chadwell St Mary	Chadwell St Mary	3.9	Secondary Industrial and Commercial Area	Green Belt	Previously Developed	General	Edge of village	Local	B2/B8/ compounds	1980s	Average	No	Poor	Residential	Poor	Average	No	No	Potential for residential use	Medium		Council has granted outline consent for 203 dwellings
T38	Fiddlers Reach, Woultham Road, South Stifford	West Thurrock	9.9	Primary Industrial and Commercial Area	Urban	Previously Developed	Truck & van sales	Commercial	Local / Regional	Compounds	N/A	Average	Yes	Poor	Rail	Average	Poor	Expansion land	No	Limited	Medium		Recent take-up for storage compounds. Site boundary with T85 revised to avoid overlap.
T44	Goodmans, Bluelands (West), Purfleet	Purfleet	7.1	Primary Industrial and Commercial Area	Urban	Previously Developed	Distribution	Commercial	National	B8	2020s	Very Good	Yes	Good	Residential	Very good	Good	No	Yes B8	Limited	Strong		
T46	Ascension Business Park, Chafford Hundred	West Thurrock	0.3	Secondary Industrial and Commercial Area	Urban	Previously Developed	Retail Park	Commercial	National	Retail	1990s	Average	Yes	Good	Warehouses & retail	Very good	very good	Yes	No	Potential for commercial use	Medium		
T53	Ocado, Ponds Farm, London Road, Purfleet	Purfleet	8.2	None	Urban	Greenfield	Distribution	Commercial	National	B8	2000s	Very good	No	Good	Industrial /roads	Good	Good	No	Yes	Limited	Strong		Recent development of warehouse
T56	London Distribution Park, Dock Approach Road, Tilbury	Tilbury	29.7	Primary Industrial and Commercial Area	Green Belt	Previously Developed	Distribution	Commercial	International	B8	2010s	Very good	No	Good	Port / Supermarket	Good	Good	No	Yes	Limited	Strong		
T59a	Blue House Farm, Brentwood Road, West Horndon	Bulphan	5.2	Developed - Green Belt	Green Belt	Greenfield	General	Rural	Local	B2/B8	1950s	Poor	No	Poor	Agricultural	Good	Poor	No	Expansion onto field	Limited	Medium		
T60	East of Sandy Lane, Chadwell St Mary	Chadwell St Mary	2.3	Secondary Industrial and Commercial Area	Urban	Previously Developed	General (tertiary)	Mixed Ind & res	Local	B2 / car repair	1960s	poor	No	Poor	Residential	Poor	Very poor	No	No	Potential for residential use	Medium		Small industrial area with poor access through residential area. Area to south of settlement needs comprehensive approach to future use and development.
T61a	Carpetright, Purfleet Bypass, Purfleet	Purfleet	12.2	Primary Industrial and Commercial Area	Urban	Previously Developed	Distribution	Commercial	National	B8	2000s	Good	No	Very Good	Residential	Good	Very good	No	Yes	Limited	Strong		
T61b	Purfleet Centre Regeneration (north quadrant)	Purfleet	26.7	Primary Industrial and Commercial Area	Urban	Previously Developed	General	Industrial	Local / Regional	B2/B8/scrap/deposits	1950s	Poor	No	Very Poor	Residential to south	Good	Very Poor	No	No	Potential for mixed-use	Medium	0.56	
T63b	Purfleet Centre Regeneration (east quadrant)	Purfleet	9.1	Primary Industrial and Commercial Area	Urban	Previously Developed	General	Industrial	International	B8	1970s	Average	No	Poor	School to west	Poor	Good	No	No	Potential for mixed-use	Medium		Includes T26
T67	Purfleet Centre Regeneration (south quadrant)	Purfleet	13.8	Primary Industrial and Commercial Area	Urban	Previously Developed	General	Industrial	Local / Regional	B2/B8	N/A	N/A	No	Poor	Oil depot to east	Poor	Good	Yes	No	Potential for mixed-use	Weak	12.77	
T65	Junction 31 Park, Motherwell Way	West Thurrock	6.6	Primary Industrial and Commercial Area	Urban	Previously Developed	General	Commercial	Local / National	B2 /B8	1970s	Poor	No	Poor	Residential to north	Good	Poor	No	No	Limited	Medium		Estate investment strategy required.
T66	South of Motherwell Way	West Thurrock	5.3	Primary Industrial and Commercial Area	Urban	Previously Developed	General	Commercial	Local / National	B2 /B8 / Trade/ Recycling	2000s	Good	No	Good	Residential to South	Good	Good	2x trade units, 1x compound	Yes	Limited	Medium		
T71	Esso Petroleum, Purfleet	Purfleet	15.8	Oil and Chemical Storage	Urban	Previously Developed	Specialist	Industrial	International	Oil Storage Terminal	N/A	N/A	No	Average	Industrial	Good	Good	No	No	Limited	Medium		
T72	Vopak, West Thurrock	West Thurrock	17.3	Oil and Chemical Storage	Urban	Previously Developed	Specialist	Industrial	International	Oil Storage Terminal	N/A	N/A	No	Average	Industrial	Average	Good	No	No	Limited	Medium		
T74	Askew Farm Industrial Estate, Grays	Grays	24.0	Primary Industrial and Commercial Area	Urban	Previously Developed	Compounds	Commercial	Local	Eg/B2/B8	1990s	Average	No	Poor	Oil Storage & Ind	Poor	Very poor	No	No	Limited	Medium		Estate investment strategy required. If Kaneb vacate review road network in wider estate.
T76	Arisdale Industrial Estate, South Ockendon	South Ockendon & Aveley	2.9	Secondary Industrial and Commercial Area	Urban	Previously Developed	General	Mixed Ind & res	Local	B2 / car repair	1950s	Poor	No	Average	Residential	Average	Average	No	No	Potential for residential use	Medium		Area of estate has reduced through redevelopment for housing. Three blocks of employment premises remain: b = 1.25ha, c = 1.16ha and d = 0.51ha.
T77	Titan Works, Hogg Lane, Grays	Grays	14.2	Secondary Industrial and Commercial Area	Urban	Previously Developed	Specialist	Mixed Ind & res	National	Chemical works	1980s	Average	No	Average	Chalk pit	Poor	Average	No	No	Limited	Medium		Site recently purchased by Chancerygate STP for new industrial & logistics.
T78a	Maidstone Road, Grays West	Grays	0.8	Secondary Industrial and Commercial Area	Urban	Previously Developed	General	Industrial	Local	B2	1950s	Poor	No	Poor	Railway, community uses	Poor	Poor	Yes	No	Potential for residential /	Medium		Other parts of Grays West employment area have been redeveloped or reoccupied for a mix of uses including residential and retail.
T80	Baryta Close, Stanford-Le-Hope	Stanford-le-Hope	2.0	Secondary Industrial and Commercial Area	Urban	Previously Developed	General	Mixed Ind & res	Local	B2	1930s	Poor	No	Very poor	Residential/rail	Poor	Very poor	No	No	Potential for residential /	Weak	0.37	Small estate adjoining housing on edge of town centre, adopt flexible approach to redevelopment
T81	Vopak, West Thurrock - East of Existing Tank Terminal	West Thurrock	15.5	Oil and Chemical Storage Expansion	Urban	Previously Developed	Specialist	Industrial	International	Road tanker park	N/A	N/A	N/k	Average	Oil Storage Terminal	Average	Good	No	No	Limited	Medium	9.42	Identify access route through discussions with adjoining occupiers.
T85a	West Thurrock Marshes (south of railway)	West Thurrock	86.1	Primary Industrial and Commercial Area	Urban	Previously Developed	General	Industrial	Local/National/International	Elg) /B2 /B8 /recycling	1970s-2010s	Poor to very good	No	Poor to good	Industrial	Good	Poor to good	1 x compound	Yes	Limited	Strong	12.50	
T85b	West Thurrock Marshes east (P&G)	West Thurrock	23.1	Primary Industrial and Commercial Area	Urban	Previously Developed	General	Industrial	International	B2 - chemical works	1970s	Average	No	Average	Railway, river and storage	Good	Poor	No	Yes	Limited	Strong		Proctor and Gamble have invested in their facility
T85c	West Thurrock Marshes (north of railway)	West Thurrock	9.5	Primary Industrial and Commercial Area	Urban	Previously Developed	General	Industrial	Local	B2 / vehicle repair & engineering	1970s	Average	No	Poor	Commercial, residential & railway	Good	Poor	Plot in SW corner	No	Potential for mixed-use	Medium	0.40	
T85d	West Thurrock Marshes (north west)	West Thurrock	9.5	Primary Industrial and Commercial Area	Urban	Previously Developed	General	Industrial	Local / National	B2 / B8	1970s	Average	Yes	Average	Industrial & railway	Good	Poor	No	No	Limited	Strong		
T88	Argent Street, Thames Road, Grays	Grays	0.8	Secondary Industrial and Commercial Area	Urban	Previously Developed	General	Mixed Ind & res	Local	B2 Metal fabrication	1930s	Poor	No	Poor	Residential	Poor	Poor	No	No	Potential for residential use	Weak		Premises used for metal fabrication. Formerly part of larger industrial complex, that has largely been redeveloped for housing.
T90	Coryton Oil Refinery expansion land (north of existing refinery)	Stanford-le-Hope	44.2	Oil Refinery Expansion Area	Urban	Greenfield	Specialist expansion	Rural	None	Agricultural	N/A	N/A	No	Average	Agricultural	Good	Very poor	Undeveloped	No	Limited	Weak	44.21	Expansion of oil refinery now very unlikely.
<b>TOTAL</b>			<b>1343.6</b>																			<b>376.49</b>	



APPENDIX 3 – MATRIX OF AVAILABLE EMPLOYMENT SITES

Available Employment Sites in Allocated Employment Areas		QUANTITATIVE ASSESSMENT			NPPF ASSESSMENT			MARKET ASSESSMENT CRITERIA									SUSTAINABILITY CRITERIA					ADDITIONAL INFORMATION	
Site Ref	Site	Gross Site Area (ha)	Gross : Net Ratio	Estimated Net Area (ha)	Suitable	Available	Achievable	Requires Preparation / Immediately Available	Greenfield / Brownfield	Within 2 km of SHN	Access to Strategic Highway Network	Site Characteristics and Physical Constraints	Infrastructure	Market Attractiveness	Barriers to Development	Ownership Factors	Local Road Access	Proximity to Urban Areas	Compatibility of Adjoining Uses	Planning Sustainability	Sequential Status	Type of Use	Comments / Notes
<b>SOUTH OCKENDEN</b>																							
		0.00		0.00																			
<b>AVELEY</b>																							
		0.00		0.00																			
<b>PURFLEET</b>																							
T67 & T68	West of Purfleet Station	8.78	75%	6.59	Y	Y	N	RP	BF	N	2	4	2	2	3	3	2	4	4	5	2	B2, B8, maritime	NU living residential development on opposite side of London Road. PCRL proposing residential development. High costs of site preparation and remediation undermine viability of employment development.
T63a	Former Thames Board Mills Site, London Road, Purfleet	3.99	100%	3.99	Y	Y	N	RP	BF	N	2	3	2	2	1	4	2	4	5	5	2	B2, B8, maritime	Landlocked except to neighbouring occupiers, PCRL proposing nature reserve. High costs of site preparation and remediation could undermine viability of employment development.
T27	North of ADM Pura Foods, London Road, Purfleet (west of road)	0.77	100%	0.77	Y	Y	Y	IA	BF	Y	4	4	4	4	4	3	5	3	5	4	2	B2, B8, maritime	Buildings demolished and site levelled. Proposed use unknown.
T27	North of ADM Pura Foods, London Road, Purfleet (east of road)	6.66	100%	6.66	Y	Y	Y	IA	BF	Y	4	4	4	4	4	3	5	3	5	4	2	B2, B8, maritime	Buildings demolished piles of rubble remain. Proposed use unknown.
T48	East of Jurgens Road and south of London Road , Purfleet	8.10	85%	6.89	Y	Y	Y	RP	BF	Y	4	3	1	4	1	4	5	3	5	5	2	B2, B8, maritime	RM consent for 3 warehouses on northern part (16/00958/REM). Railway viaduct above site. Site requires infrastructure.
T28	Lafarge Jetty site, west of Quarry Road	1.43	100%	1.43	Y	Y	Y	RP	BF	Y	4	1	2	2	3	3	4	2	5	4	2	B8, maritime	Most likely to be used as compound,
T52	East of Quarry Road	1.66	100%	1.66	Y	Y	Y	RP	BF	Y	5	2	2	4	1	2	5	2	5	4	2	B2, B8, maritime	Council own land fronting Quarry Road, land in other titles to rear. Requires infrastructure and remediation.
T42	Plot 44 Purfleet Industrial Park	0.45	100%	0.45	N	Y	N	IA	GF	Y	5	3	4	4	4	3	5	2	4	3	2	Flood alleviation	Separated from Purfleet Ind Pk by road embankment, but adjoining T57. Access from Old Tank Hill Road. Balancing pond in centre of site creates risk of flooding and could frustrate development.
T47	Botany Way, Purfleet	0.56	100%	0.56	Y	Y	N	IA	GF	Y	5	2	4	3	4	3	5	2	4	4	2	B8, depot	Narrow site bounded by road and rail embankments. Adjoins trailer and container depots. Within PCRL area T61 identified for mixed-use development.
		32.40		28.99																			
<b>WEST THURROCK</b>																							
T35a	Off eastern end of Oliver Road and north of sub-station	3.90	85%	3.32	Y	N	N	RP	BF	Y	4	3	2	3	2	3	4	2	5	4	2	B2, B8,	Former ICL sports ground, allocated as open space but used for informal storage. UHV cables cross western edge. Within large established employment area.
T54b	South of Oliver Road	12.50	85%	10.63	Y	Y	Y	RP	BF	Y	4	2	1	3	1	2	4	2	5	4	2	B2, B8,	Brownfield site that requires remediation and infrastructure provision.
T81a	Burnley Road (off eastern tip)	9.42	85%	8.01	Y	Y	Y	RP	BF	Y	4	3	1	3	1	3	4	2	5	4	2	refinery	Brownfield site that requires remediation and infrastructure provision.
T85e	South of Flint Street	0.40	100%	0.40	Y	N	N	RP	BF	Y	4	4	2	3	4	3	2	4	2	4	2	compound	Within existing employment area T85c. Adjoins West Thurrock Academy. Access through housing .
		26.22		22.35																			
<b>GRAYS</b>																							
T14a	Eastern end of Manor Way Industrial Estate	0.66	100%	0.66	Y	Y	N	RP	BF	N	3	4	3	3	2	3	1	3	2	4	2	B2, B8 , compound	Council owned. Buildings demolished but further remediation required. Review of employment area suggests deallocation.
		0.66		0.66																			
<b>BULPHAN</b>																							
		0.00		0.00																			
<b>TILBURY</b>																							
T21a	Land to NW of Thurrock Park	4.46	90%	4.01	Y	Y	Y	RP	GF	Y	5	3	2	4	4	3	5	1	5	2	2	Eg, B2, B8	Access route reserved. Council owned
T22a	NE nib, Tilbury South	1.34	100%	1.34	Y	N	N	RP	GF	N	3	4	2	3	3	3	5	2	4	2	2	B8, depot	Not within Freeport. Freeport designation has rationalised boundary
T22b	SE corner of Tilbury South	0.89	100%	0.89	Y	Y	Y	IA	GF	N	1	3	5	3	4	3	3	1	5	3	2	Eg, B2, B8	Not within Freeport, but squares off allocated employment area
T07a	NW corner of Thames Industrial Estate, East Tilbury	2.52	90%	2.27	Y	Y	N	RP	GF	N	1	4	2	1	2	3	2	1	5	2	3	B2, B8 , compound	Analysis of employment areas proposes allocating for mixed use
T07b	Southern edge of Thames Industrial Estate, East Tilbury	0.45	100%	0.45	Y	Y	N	IA	GF	N	1	4	3	1	5	3	2	1	5	2	3	B2, B8 , compound	Analysis of employment areas proposes allocating for mixed use
		9.66		8.96																			
<b>STANFORD LE HOPE</b>																							
T80	West of Baryta Road	0.37	100%	0.37	Y	Y	N	IA	BF	Y	4	3	3	2	4	3	2	5	4	4	3	B2, B8, compound	Narrow site between station car park and watercourse. Analysis of employment areas proposes flexible approach to development. The site is to be redeveloped to form part of the transport interchange and flood mitigation.



Score	MARKET ASSESSMENT CRITERIA						SUSTAINABILITY CRITERIA				
	Access to Strategic Highway Network	Site Characteristics & Physical Constraints	Infrastructure	Market Attractiveness	Barriers to Development	Ownership Factors	Local Road Access	Proximity to Urban Areas	Compatability of Adjoining Uses	Planning Sustainability	Sequential Status
5	Within 2 km of SHN via unconstrained roads.	Level. Regular shape. Low risk of flooding. Not in COMAH zone. > 3 ha.	Well served by good quality site infrastructure: roads, lighting, landscaping, mains utilities.	Area of strong demand. Suit broad range of businesses. High profile location. Viable development location.	Serviced remediated plot with infrastructure to edge.	Single developer prepared to build speculatively.	Free moving, wide roads, avoid housing areas and bad junction.	Within 1 km of town centre. Good pedestrian access to housing areas. Close to bus / metro stop.	Within larger employment area. No incompatible land use.	Brownfield site. Compliant with planning policy objectives. Strong settlement boundary. Extant planning consent.	In town centre.
4	Within 2 km of SHN via constrained roads.	One constraint	All infrastructure. Average quality.	One constraint	Modest infrastructure <b>or</b> remediation.	Single developer will only build bespoke premises.	One constraint	Within 2 km of town centre. Good pedestrian access to housing areas. Close to bus / metro stop.	Separated by highway from incompatible land uses.	One constraint	In minor centre.
3	Within 2 km of other dual carriageway via unconstrained roads.	Two constraints	All infrastructure. Poor quality.	Two constraints	Modest infrastructure <b>and</b> remediation.	Single owner, not a developer.	Two constraints	One constraint Within 2km of town / district centre or bus/metro stop.	E(g) adjoining residential areas	Two constraints	Edge of Centre (within 500 m).
2	Within 2 km of other dual carriageway via constrained roads.	Three constraints	Limited infrastructure	Three constraints	Major infrastructure provision <b>or</b> remediation.	Two owners	Three constraints	Two constraints Over 2km from town / district centre or bus/metro stop.	B2 & B8 adjoining residential areas	Three constraints	Out of Centre.
1	Over 2 km from dual carriageway.	Four constraints	Major infrastructure required.	Four constraints	Major infrastructure provision <b>and</b> remediation.	Site assembly required.	Four constraints	Three constraints Over 3km from town / district centre or bus/metro stop.	B2 & B8 adjoining residential areas on more than one side.	Four constraints	Out of Town.

## APPENDIX 5 – GLOSSARY OF TERMS

### **Available Employment Land**

Land within an established employment area or allocated for employment purposes that is not occupied or otherwise in operational use. Available land excludes (a) expansion land, (b) land with empty industrial buildings already in-situ, unless those buildings are time expired, and (c) special sites allocated for specific employment uses. A minimum size threshold of 0.25 hectare has been adopted.

### **Employment Land**

Sites that are either (a) allocated for employment use in the development plan, (b) occupied for employment use, (c) formerly in employment use and do not have planning consent nor are allocated for an alternative use, or (d) sites with consent for employment use.

### **Employment Uses**

Business, general industry and storage/distribution uses as defined by Classes E(g), B2 & B8 of the Town and Country Planning (Use Classes) Order 2021. Land could generally be developed for any type of employment use with no distinction being made between general industrial uses, warehousing and commerce. Employment uses exclude retail, leisure, residential care facilities, mineral extraction and waste disposal.

### **Existing Employment Area**

An area allocated for employment purposes, or an area where employment uses are established.

### **Implied Supply**

An estimate of the number of years that it would take to consume available land at prevailing take-up rates. It is calculated by dividing the amount of available land by the average yearly take-up.

### **Immediately Available**

Sites that require minor remediation or infrastructure provision, which can be brought forward for development in less than 12 months.

### **Loss**

The take-up of sites in employment areas for non-employment use (e.g. housing, retail or leisure).

### **Potential Sites**

Land not allocated for employment, nor within an established employment area, but which has been identified by the Council for assessment as part of this study and which could be allocated for employment use in the emerging Local Plan.

### **Requiring Preparation**

Sites where major provision of roads and utility services is required and/or where site assembly, demolition and remediation is required, and which are likely to take at least a year to bring forward for development.

### **Restricted Sites**

Land that is reserved for specific industry sectors or purposes. Examples include ports, airports, and major industry clusters. Such sites are considered separately from general employment sites.

### **Strategic Highway Network**

Motorways and dual carriageways where the national speed limit applies.

### **Take-up**

The development or first occupation of a site. Take-up occurs at the point at which construction of a building commences. Take-up excludes (a) extensions of existing premises unless they occur on land beyond the original boundary of the site and (b) changes of use. Depots used for storage or yards used for fabrication, dismantling, or other processes are regarded as take-up when first occupied; subsequent changes in occupation or use are excluded.

Where buildings are demolished and a site is redeveloped, this constitutes take-up. Where a site is built out in separate phases (rather than a continuous rolling programme), take-up occurs at the start of each phase.

### Application of gross:net ratios

Take-up of employment land is typically recorded on a plot by plot basis, which equates to a net developable area. To be consistent, availability should be measured on a similar basis. So for some sites, gross to net adjustments will be appropriate. We have considered each site and estimated the proportion of land likely to be lost to servicing and landscaping, having regard to typical gross:net ratios achieved on industrial estates and business parks elsewhere in the region.

Lambert Smith Hampton has assessed a wide range of employment sites and a guide to appropriate adjustments in different circumstances is set out in the following table. It should be noted that site specific factors may also need to be taken into account, particularly where parts of sites are undevelopable. Where masterplans or other site specific work sets out net developable areas then these should be used in preference to more generic ratios.

TYPICAL GROSS:NET RATIOS APPLIED TO EMPLOYMENT LAND		
Type	Ratio	Comment
Serviced plot on industrial estate fronting road.	100%	
Area of land that could easily subdivide into serviced plots with road frontage.	100%	
Large area of land on industrial estate too big for single scheme, having regard to other buildings on estate.	95%	Provision for spur road.
Major undeveloped part of industrial estate or extension to industrial estate.	90%	Provision for roads and landscaping to one or more sides.
Small local allocation, requiring infrastructure.	90%	Provision for spur road, but landscaping likely to be minimal
Level site allocated for industrial estate	85%	Provision for spur road and landscaping.
Site allocated for industrial estate where terracing or bunding required	80%	Provision for spur road and landscaping.
Land allocated for business park with high landscape quality	75%	Provision for spur road extensive landscaping, balancing ponds etc.
Land allocated for employment use where a single end user could be in the market.	100%	All land to be taken by single user, surplus areas to be kept for its expansion.

## APPENDIX 6 – TAKE-UP OF EMPLOYMENT LAND 2004-2021

TAKE UP OF EMPLOYMENT LAND				
Employment Area	Site Address	Use	Area (ha)	Date
<b>London Gateway</b>				
London Gateway Logistics Park	1, London Gateway	Offices	1.48	2012
	Plot 2 - UPS	Warehouse	18.80	2016
	Plot 7 - Currys	Warehouse	6.50	2016
	Plots 8 & 9 - Lidl & Made.com	Warehouse	9.57	2015
	Plot 4 - SH Pratt Group	Warehouse	2.37	2017
	Lorry Park	Compound	5.61	2018
	Plot 5 - CEVA Logistics	Warehouse	2.55	2019
	Plot 6 - P&O Ferrymasters	Warehouse	4.26	2019
	Plot 11 - Zeigler	Warehouse	2.00	2019
	Plot 19 - London City Bond	Warehouse	2.86	2021
	Plot 10 - Compagnie Fruitiere	Warehouse	1.75	2021
	Plot 13 - Made.com	Warehouse	7.44	2021
	Plot 14 - DHL	Warehouse	8.65	2021
			<b>73.84</b>	
<b>Stanford le Hope</b>				
Stanhope Ind Est	UPR Scaffolding	Compound	0.39	2017
	Pave World	Compound	0.44	2017
	Unit Hire Ltd	Compound	0.40	2018
	N/k	Compound	0.40	2019
	Rickabin	Compound	0.74	2019
	Lowes Metals	Compound	0.85	2019
	NE Compound	Compound	0.86	2020
	SW Compound	Compound	0.90	2004
	N compound	Compound	0.49	2007
			<b>5.47</b>	
<b>Tilbury</b>				
Thurrock Parkway	Northern extension	Industrial	1.51	2006
Dock Road, Tilbury	West of Dock Road	Industrial	2.30	2019
Windrush Road	Tevva	Warehouse	4.00	2014
	Maritime Transport Ltd	Compound	2.44	2017
	Amazon	Warehouse	13.70	2017
Fortress Distribution Park	Howard Tenens Logistics	Warehouse	3.97	2004
Fortress Distribution Park	Car compound north	Compound	6.40	2004
Fortress Distribution Park	Car compound west	Compound	5.84	2006
Fortress Distribution Park	Riverside Business Centre	Industrial	0.81	2004
Fortress Distribution Park	Car compound south	Compound	3.10	2006
Tilbury 2	Esken Renewables	Compound	6.33	2016
Thames Ind Est	SW corner	Compound	0.23	2012
	Compound	Compound	0.12	2009
	PH Transport west extn	Compound	0.09	2014
	South extn of compound	Compound	0.09	2021
			<b>50.93</b>	
<b>Bulphan (Cluster 4)</b>				
Brentwood Road	W extn	Industrial	0.19	2013
	East of Road - extension	Compound	1.00	2007
			<b>1.19</b>	
<b>Grays (Cluster 3)</b>				
Hogg Road	PO Sorting Office	Warehouse	0.77	2012
Seally Road	Travis Perkins	Warehouse	0.44	2004
South of Curzon Road	Salvage yard	Compound	0.43	2016
Towers Road	Grays Motor Parts	Industrial	0.41	2018
	Trunk Logistics	Warehouse	0.45	2016
	Maxx Shoring BV	Compound	0.33	2014
	Map Plant	Compound	0.60	2013
New Road	Council Offices	Office	0.20	2020
			<b>3.63</b>	

Employment Area	Site Address	Use	Area (ha)	Date
<b>South Ockenden (Cluster 2)</b>				
<b>Aveley (Cluster 1)</b>				
Markey Works	W edge	Compound	0.73	2005
	SW	Compound	1.58	2010
			<b>2.31</b>	
<b>Purfleet (Cluster 1)</b>				
Purfleet Road	Ocado	Warehouse	7.65	2020
Purfleet Industrial Park	NW	Compound	0.34	2010
	N	Compound	0.90	2010
	A Elfes Memorials	Industrial	0.52	2005
Ensign Estate, Botany Way, Purfleet	Top Site	Compound	1.19	2004
	Top Site	Industrial	0.85	2021
Beacon Hill Ind Est	Lorry Park	Compound	0.18	2005
	Container Compound	Compound	0.17	2005
	Lorrk Park W Extn	Compound	0.10	2006
	West Expansion	Compound	4.27	2016
	KBC Workshop	Industrial	0.46	2005
	The Larch Barn	Industrial	0.53	2006
	S & W extensions to KBC etc	Compound	0.28	2021
	Cheapest Cars	Warehouse	0.19	2010
	Carpetright	Warehouse	12.19	2006
Former Thames Board Site	Jewson Distribution Centre	Warehouse	1.28	2013
	International Timber	Compound	4.00	2015
Riverside	Car Terminal	Compound	2.91	2017
	ADM Pura Foods	Industrial	2.94	2005
	Multi Storey Car Park	Compound	4.22	2019
Dolphin Estate	NW	Warehouse	5.69	2005
	Tesco	Warehouse	15.40	2005
	Goodmans, Purfleet Commercial Pk	Warehouse	7.10	2021
	west - James Latham etc	Warehouse	3.61	2004
	Dolphin Point	Industrial	1.19	2004
	Neptune Business Estate	Warehouse	1.25	2005
	A&B Dolphin Way	Warehouse	5.19	2004
	London Road	Industrial	0.34	2006
	LMC Car Sales	Industrial	0.28	2011
			<b>85.22</b>	
<b>West Thurrock (Cluster 1)</b>				
Lakeside / Waterglade Ind Est	Western Ave/ Central Ave	Warehouse	2.24	2004
	1 Barclay Way, London City Bond	Warehouse	3.00	2016
	Euclid Way	Warehouse	0.85	2004
	CGUK, Crown House	Industrial	0.27	2004
	Wyldecrest House	Office	0.16	2008
	Unit D Queenbridge Ind Park	Industrial	0.15	2004
	TES House, Motherwell Way	Warehouse	0.12	2004
	Thames House, 690 London Road	Warehouse	0.52	2004
	Motherwell Way	Warehouse	0.28	2004
	Logistics City Motherwell Way	Warehouse	3.10	2016
	Trade City Motherwell Way	Warehouse	1.28	2016
	Cliffside Trade Park Motherwell Way	Warehouse	1.47	2005
	Block E J31, Motherwell Way	Industrial	0.53	2008
	Ambulance Transfers Essex	Industrial	0.20	2008
West Thurrock Marshes	Electricity Distribution, Oliver Close	SG	0.71	2005
	Warton Freight Services, Oliver Close	Warehouse	0.39	2014
	Lorry Park, Oliver Close	Compound	0.26	2014
	Oliver Close SE	Compound	0.18	2008
	Salt Store, St Clement's Way	Compound	0.50	2009
	Plot 8 Thurrock Open Storage Park	Compound	0.47	2016

Employment Area	Site Address	Use	Area (ha)	Date
	Tower Thurrock, Oliver Road	Warehouse	5.63	2014
	Thurrock Trade Park, Oliver Road	Warehouse	2.19	2008
	Plot 6, Oliver Road	Warehouse	1.11	2012
	Plot 7, Thurrock Trade Park	Compound	0.21	2017
	Royal Mail, Oliver Road north	Warehouse	3.27	2008
	Compound, Oliver Road north	Compound	2.10	2004
	Cooperative Retail Logistics	Warehouse	6.00	2006
	Plot 1, Thurrock Commercial Park	Industrial	2.45	2012
	Plot 2, Thurrock Commercial Park	Compound	1.58	2012
	Cosgrove Court south	Industrial	1.14	2004
	Cosgrove Court south 2	Industrial	0.18	2006
	Cosgrove Court south 3	Industrial	0.28	2014
	Isotank, Oliver Close	Compound	0.83	2004
	Land adjoining 27 Oliver Close	Warehouse	0.20	2015
	Spartan Scrap Metal	Compound	0.40	2014
	Cruseley Trailer Engineering, A1099	Industrial	1.75	2013
	Procter & Gamble eastern extension	Warehouse	3.97	2006
	East of Hedley Road	Compound	0.33	2018
	East of Hedley Road 2	Compound	0.42	2019
	West of Wouldham Road	Compound	6.72	2020
	South of Wouldham Road		0.12	2006
	Sandy Lane	Industrial	0.31	2008
	London Rd / W Thurrock Way	Compound	0.49	2017
Chafford Hundred	Ascension Business Park	Offices	0.24	2005
Europa Trading Estate	Magnet Point	Industrial	2.10	2005
	Magnet Point South	Industrial	0.41	2015
	434 London Road	Industrial	0.47	2018
	East of Magnet road	Warehouse	0.40	2014
Cliffside Ind Est	Northern tip	Compound	0.29	2008
	7 days services	Industrial	0.44	2013
	Cliffside Ind Est East	Industrial	1.10	2004
	Cliffside Ind Est island site	Industrial	0.54	2004
	Cliffside Ind Est SE	Compound	1.81	2004
	365 Hire, Askews Farm Lane	Compound	0.18	2004
	City Oils, 12 Askews Farm Lane	Compound	0.25	2004
	Cliffside Ind Est west	Industrial	0.76	2017
	Cliffside ind Est SE strip	Compound	0.30	2006
	Cliffside Ind Est west central	Compound	0.74	2004
West Thurrock Works	Titan Truck Park	Compound	2.44	2007
	Titan Truck Park extn	Compound	1.35	2010
	Titan Truck Park extn 2	Compound	0.71	2012
	NE of Oliver Rd	Compound	1.82	2012
	W of Watson Close	Compound	1.00	2014
	S of Watson Close	Compound	1.20	2005
	N of Watson Close	Compound	1.22	2008
	Roadtrain, 1 Burnley Road	Compound	0.55	2010
	3 Burnley Road	Compound	0.26	2012
	South of Burnley Road	Compound	0.72	2007
	East of Burnley Road	Compound	0.53	2015
	East of Burnley Road 2	Industrial	1.65	2017
	SE of Burnley Road	Compound	0.33	2014
			<b>82.17</b>	
			<b>304.76</b>	



APPENDIX 7 - MATRIX OF POTENTIAL EMPLOYMENT SITES

Potential Employment Sites		QUANTITATIVE ASSESSMENT			NPPF ASSESSMENT			MARKET ASSESSMENT CRITERIA										SUSTAINABILITY CRITERIA					CONSTRAINTS				ADDITIONAL INFORMATION
Site Ref	Site	Gross Site Area (Ha)	Gross : Net Ratio	Estimated Net Area (ha)	Suitable	Available	Achievable	Requires Preparation / Immediately Available	Greenfield / Brownfield	Within 2 km of SHN	Access to Strategic Highway Network	Site Characteristics and Physical Constraints	Infrastructure	Market Attractiveness	Barriers to Development	Ownership Factors	Local Road Access	Proximity to Urban Areas	Compatibility of Adjoining Uses	Planning Sustainability	Sequential Status	Policy	Physical	Legal	Type of Use	Comments / Notes	
<b>SOUTH OCKENDEN</b>																											
T58	West of B186 North Road	95.07	50%	47.54	N	Y	N	RP	GF	N	1	5	1	3	2	1	3	5	2	1	3	Green Belt	Major on and off site infrastructure required	7 titles. Broad strip of land to be taken for LTC will sever site. Allocating for employment would increase compensation for land taken.	B2, B8	Although just to the east of the M25, access is via small roads. The proposed motorway to the Lower Thames Crossing would link to the M25 just to the north-west and cross the centre of the site, but without providing direct access, would not benefit the site. There are Grade 2 listed buildings to the south of the site. The site has also been put forward for consideration for residential development.	
T82	West of Arisdale Avenue	6.13	100%	6.13	N	Y	N	RP	GF	N	1	5	2	3	2	3	3	5	4	2	3	Green Belt	On-site infrastructure required		B2, B8	Nature reserve to north. Adjacent to employment growth allocation (CSSP2). Close to route of proposed motorway to LTC but no provision for direct access to new road. Continuing loss of South Ockenden's employment areas to residential development justifies some additional local provision, but affordability issues could constrain viability. Site has also been put forward for consideration for residential development.	
T39	South west of Hangman's Wood Industrial Park, Stifford Road	3.45	90%	3.11	N	Y	Y	RP	BF	N	1	4	2	4	2	3	5	4	5	4	2	Green Belt		Landlocked unless used as extension to adjoining premises.	B8	Would allow the further extension of an existing employment area where businesses have large areas of external storage. The likely use would be for further external storage. The site is within the Green Belt but screened by woodland and adjoins a local nature reserve.	
		<b>104.65</b>		<b>47.54</b>																							
<b>AVELEY</b>																											
T75	Ponds Farm Two	30.30	80%	24.24	N	Y	Y	RP	GF	Y	5	5	1	4	2	1	5	3	5	1	1	Green Belt	Scale of site may require off-site works	4 freehold titles	B2, B8	Agricultural land with national food distribution business occupying farm buildings. The site is located alongside the A13 with very good access to the strategic highway network.	
		<b>30.30</b>		<b>24.24</b>																							
<b>PURFLEET</b>																											
T43a	Watts Wood	13.70	80%	10.96	N	Y	N	RP	GF	Y	5	4	2	5	2	4	5	4	4	1	2	Green Belt & Greengrid	Clearance of woodland and provision of new access onto Arterial Road.		B2, B8	Flood risk along Mardyke and at western end of site. Watts Wood which fronts the A1306 Arterial Road is ancient woodland which if protected from development, would significantly reduce developable area. UHV cables cross site on pylons. The land is in the same ownership as T101 but does not form part of the planning application.	
T101	Mardyke Farm, Ship Lane	13.24	90%	11.92	N	Y	Y	RP	BF/GF	Y	5	4	2	5	2	4	5	4	4	1	2	Green Belt & Greengrid	On-site infrastructure needs renewal and extension.		B2, B8	Incorporates existing employment premises at east end of site. UHV cables cross site on pylons. A planning application for development of B2/B8 has not been determined.	
T57b	Union Rail (North) Ltd, Purfleet	1.30	50%	0.65	Y	Y	Y	IA	GF	Y	5	3	2	3	4	3	5	2	4	3	2	White land	Narrow site with UHV cables over will constrain use.		B8, compound	Narrow triangular site. Pylon in centre. UHV cables cross site, severely restricting developable area and range of uses.	
T57c	Union Rail (North) Ltd, Purfleet	0.35	100%	0.35	Y	Y	N	RP	GF	N	1	3	1	2	2	3	5	2	5	3	2	White land	Narrow site with UHV cables over and landlocked by railway lines.		compound	Narrow site land locked by railway lines. UHV cables over. High abnormal costs of development and small developable area would undermine viability of development.	
T57d	Union Rail (North) Ltd, Purfleet	1.33	80%	1.06	N	Y	Y	RP	GF	Y	5	3	2	3	3	3	5	2	4	3	2	Green Belt & Greengrid	Clearance and levelling required.		B2, B8	Planted spoil from railway and road works, may act as flood defence for Milehams Ind Est (T03). UHV pylon in centre and cables over western part could restrict range of uses.	
		<b>29.92</b>		<b>22.88</b>																							
<b>WEST THURROCK</b>																											
T102	Arena Essex	51.70	80%	41.36	N	Y	Y	RP	BF/GF	Y	5	4	2	4	2	3	5	4	4	2	2	Green Belt & Greengrid	On-site infrastructure needs renewal and extension. Existing accesses to surrounding road network.		Eg, B2, B8	Area of semi natural open space within Green Belt, with area of water based open space. Areas of flood zone 3 on the site. Some existing infrastructure, which would need renewal as a part of comprehensive redevelopment. Major residential development proposed. Good access to both the M25 and the A13. The site has also been put forward for consideration for residential development.	
T99	East of West Thurrock Way	2.01	100%	2.01	Y	Y	N	RP	GF	Y	5	2	2	4	2	3	4	5	4	2	3	White land	Narrow site requiring earth works and with UHV cables over		B2, B8	Adjacent area of semi natural open space. Narrow strip of railway embankment with pylons at either end carrying UHV cables across length of site, constraining the size and use of potential premises. Access from West Thurrock Way might be restricted.	
T31a	Thurrock Shopping Park, Lakeside	5.43	100%	5.43	Y	Y	Y	RP	BF/GF	Y	5	4	5	5	2	5	5	4	5	4	5	Retail	Retail warehouses require demolition	Termination of leases	B8	Area of flood zone 3. Currently forms part of a retail site with tenants including TK Maxx, Nike, and Smyths. The site adjoins employment premises to the south and has established infrastructure. Although the retail warehouses are still occupied a planning application for a multi-level warehouse has been submitted.	
		<b>59.14</b>		<b>48.80</b>																							
<b>GRAYS</b>																											
T100	Grays Northern Extension	13.50	100%	13.50	N	Y	Y	RP	GF	Y	5	5	1	5	2	3	5	5	4	2	1	Green Belt	Existing accesses to Arterial Road require upgrading.		Eg, B2, B8	Arable farmland crossed by UHV cables. The site adjoins a junction on the A13 and is separated from residential areas of Chafford Hundred by the Arterial Road..	
		<b>13.50</b>		<b>13.50</b>																							
<b>BULPHAN</b>																											
T59b	Blue House Farm, Brentwood Road	144.97	100%	144.97	N	Y	N	RP	GF	Y	5	4	2	2	2	1	4	1	5	2	1	Green Belt	Major on and off site infrastructure required	Farmland held in various titles	B2, B8	Arable farmland in open countryside to the west of Basildon on northern edge of Borough. An established employment area to on Brentwood Road has limited infrastructure; major infrastructure would be required prior to enable development, including highways works to the A128 Bulphan Bypass. Site has areas of Flood Zone 2 and 3.	
		<b>144.97</b>		<b>144.97</b>																							
<b>TILBURY</b>																											
T83a	Bretts Farm	3.20	90%	2.88	N	Y	Y	IA	GF / BF	Y	5	4	2	3	4	4	5	4	5	2	2	Green Belt			B2, B8	Part of an island site surrounded by roads and adjoining a haulage depot and tyre premises. The site has good access to the Dock Approach Road.	
T83b	Between Wood View and Chadwell Road	2.57	100%	2.57	N	N	Y	IA	GF	Y	4	5	2	3	4	3	3	5	5	3	4	Green Belt			Residential	Small triangular site with housing to the north and a FE college to the south. Outline consent for housing granted in July 2022 (19/01373/OUT)	
T83c	South of Wood View and Chadwell Bypass	23.27	90%	20.94	N	Y	N	IA	GF / BF	Y	5	4	2	4	4	3	4	4	5	1	2	Green Belt	Existing infrastructure would require upgrading and extending, including improved connections to road network.		Eg, B2, B8	Established access from north and south with infrastructure serving cluster of agricultural, residential and business premises in centre of site. Good road connections to A1089 Dock Approach Road.	
T87	East of Dock Rd and south of Marshfoot Rd	73.03	100%	73.03	N	Y	Y	RP	GF	Y	5	5	1	5	2	2	5	4	5	1	2	Green Belt	Major on and off site infrastructure required. Flood risk - flood storage area.	2 titles	B2, B8	Large area of farmland to the east of the A1089 Dock Approach Road. Land to the south has been developed for employment use but this site would require separate access and major infrastructure.	
T91	Tilbury 3 Phase 1	15.00	85%	12.75	N	Y	Y	IA	BF	N	3	5	3	3	4	4	4	1	5	3	1	White land		Construction of LTC requires temporary possession of land.	B2, B8, port	Cleared brownfield site with Freeport designation. LTC plans show intention to use land as segment casting factory and storage yard. The site has river frontage and could be occupied for Port uses.	
T92	Tilbury 3 Phase 2	34.40	85%	29.24	N	Y	Y	RP	BF	N	2	5	1	3	1	4	1	2	5	3	1	Green Belt	Major on and off site infrastructure required	Construction of LTC requires temporary possession of land.	B2, B8, port	Cleared brownfield site with Freeport designation. Site beyond existing road network and major infrastructure and remediation works would be needed for development. The site has river frontage and could be occupied for Port uses.	
T93	Tilbury 3 hinterland	69.90	85%	59.42	N	Y	Y	RP	GF	N	2	4	1	3	2	3	1	2	5	2	1	Green Belt	Major on and off site infrastructure required	Construction of LTC requires temporary possession of land.	B2, B8	Agricultural land with UHV cables passing over. Designated as Freeport, but without river frontage use by the Port is unlikely. Major infrastructure is required to provide access to and open up the site.	
T94	Tilbury 4 (Mott)	21.10	85%	17.94	N	Y	Y	RP	BF	N	1	4	1	3	1	3	3	1	5	3	1	Green Belt	Major on and off site infrastructure required		B2, B8, port	Cleared brownfield site with Freeport designation. Site beyond existing road network and major infrastructure and remediation works would be needed for development. The site has river frontage and could be occupied for Port uses.	



## APPENDIX 8 – SITES EXCLUDED FROM ANALYSIS

ELAA Ref	Site	Site Area (Ha)	Reason for exclusion	LSH Recommendation
T01	Plot 14, Juliet Way, Purfleet Industrial Park	0.94	Not available. Occupied as truck and trailer depot.	Categorise as part of existing employment area T02
T08	Bird Farm, Low Street Lane, West Tilbury	0.06	Below size threshold.	Consider as windfall site. Provide policy for redevelopment of brownfield sites in Green Belt
T10	Grays Station, Station Approach, Grays (commercial)	0.69	Car park for railway station. Not available, nor part of existing employment area. Has potential for town centre uses.	Consider as potential site for town centre uses. Provide policy for Grays town centre regeneration that sets out uses for redevelopment of windfall sites.
T10a	59-81 High Street, Grays (office /residential)	0.53	Redeveloped for residential.	Provide policy for Grays town centre regeneration that sets out uses for redevelopment of windfall sites.
T11	West of Grays High Street (culture/leisure /retail/residential)	0.49	Occupied premises. Not available, nor part of existing employment area.	Provide policy for Grays town centre regeneration that sets out uses for redevelopment of windfall sites.
T13	Grays Magistrate Court, Orsett Road, Grays	0.19	Occupied premises. Not available, nor part of existing employment area.	Provide policy for Grays town centre regeneration that sets out uses for redevelopment of windfall sites.
T16	Derry Avenue, South Ockendon (residential/ retail)	0.93	Part of shopping precinct. Occupied. Not available, nor part of existing employment area.	Provide policy for South Ockenden town centre regeneration that sets out uses for redevelopment of windfall sites.
T19	Stanford Industrial Estate, Stanford-le-Hope	2.03	Included in T20	Delete
T24a	Retail Warehouses, Heron Way, Lakeside, West Thurrock	19.7	Occupied for retail	Detail
T26	Former BPP, Purfleet	1.23	Part of larger employment area	Categorise as part of existing employment area T63
T30	Plot 3, Waterglade Industrial Park, West Thurrock	0.32	Occupied premises. Not available and should be included in existing employment area T31	Categorise as part of existing employment area T31.
T33a	Harris Academy, Magnet Ind Est,	2.70	School developed on north east corner of estate	Reduce size of employment area T33
T34	Ikon Grays, West Street, Grays	0.13	Occupied premises. Not available, nor part of existing employment area. Below size threshold.	Provide policy for Grays town centre regeneration that sets out uses for redevelopment of windfall sites.
T40	Stanhope Industrial Park	4.16	Included in T20	Delete
T43b	Mardyke Farm, Ship Lane, Aveley (South East)	3.48	Included in T101	Delete
T49	Sandy Lane Farm, Aveley	0.73	Included in T75	Delete
T50	Tilbury Power Station North, Tilbury	15.0	Part of Tilbury 2	Port land excluded from assessment
T51	Tilbury 2		Part of Tilbury 2	Port land excluded from assessment
T52	885 - 901 London Road, West Thurrock	0.25	Included in T27	Delete
T54a	Former West Thurrock Power Station (northern ashfield)		Now incorporated in T85	Categorise as part of existing employment area T85

ELAA Ref	Site	Site Area (Ha)	Reason for exclusion	LSH Recommendation
T55	Manor Way Ind Est. Curzon Drive, Grays	0.05	Small available site within larger employment area T14, below size threshold.	Consider as windfall site.
T57a	Union Rail, Tank Hill Road, Purfleet	0.20	Below size threshold	Consider as windfall site that would suit compound use.
T62	Cornwall House site, Purfleet	1.5	Redeveloped for residential.	Delete
T64	South of West Thurrock Way/East of Euclid Way, West Thurrock (Developed Area)	6.43	Redeveloped for residential.	Delete
T69	West of Botany Way, Purfleet		Part of larger employment area	Categorise as part of existing employment area T61
T70	East of Botany Way, Purfleet		Part of larger employment area	Categorise as part of existing employment area T61
T73	Askew Farm Road, Grays	5.7	Part of larger employment area	Categorise as part of existing employment area T74
T76	Former Ford Motor Company, Arisdale Avenue, South Ockendon	5.30	Redeveloped for residential.	Delete
T76	Arisdale Industrial Estate (Electrical Factory), South Ockendon	0.48	Redeveloped for residential.	Delete
T76	Green Plus Ltd, Arisdale Industrial Estate, South Ockendon	1.81	Redeveloped for residential.	Delete
T78	Grays West		Fragmented employment area. Now largely occupied by residential, retail warehouses and town centre car parks.	Remaining employment area (T78a – 0.76ha) included in assessment of existing employment areas.
T98	Manor House Farm, Brentwood Road, Bulphan	0.63	Majority redeveloped for residential. Remainder below size threshold.	Consider as windfall site. Provide policy for redevelopment of brownfield sites in Green Belt

## APPENDIX 9 – INDUSTRIAL TRANSACTIONS 2017-22

Occupier	Scheme name / unit	Size (sq ft)	Grade	Transaction Date
DHL	London Gateway, Stanford le-Hope	482,000	A	Q1 2020
Made.com	London Gateway, Stanford le-Hope	350,000	A	Q4 2020
UPS	London Gateway, Stanford le-Hope	345,000	A	Q4 2017
Dixons Carphone Warehouse	London Gateway, Stanford le-Hope	316,000	A	Q1 2017
Ocado	London Rd, South Ockendon	304,000	A	Q2 2020
P&O Ferrymasters	London Gateway, Stanford le-Hope	231,000	A	Q1 2019
Gousto	Chillbox, Thurrock	196,178	B	Q3 2020
Lidl	London Gateway, Stanford le-Hope	185,000	A	Q1 2017
Made.com	London Gateway, Stanford le-Hope	165,000	A	Q2 2018
London City Bond	Thurrock 162, West Thurrock	162,056	A	Q4 2020
Hermes Parcelnet	Thurrock 157, West Thurrock	156,958	B	Q3 2020
Transmec	London Gateway, Stanford le-Hope	150,000	A	Q1 2022
London City Bond	London Gateway, Stanford le-Hope	146,000	A	Q1 2022
Transmec Group	726 London Rd, Grays	121,179	B	Q4 2017
Millennium Cash & Carry Ltd	Thurrock 111, Weston Ave, Thurrock	111,645	B	Q1 2017
Kloeckner Metals	Thurrock 111, Weston Ave, Thurrock	111,645	B	Q3 2020
Teva Motors	LDP6 Tilbury	111,120	B	Q2 2021
Amazon	Proxima 111	111,000	B	Q3 2021
SH Pratt	London Gateway, Stanford le-Hope	109,000	A	Q4 2017
Oasis Group	London Gateway, Stanford le-Hope	109,000	A	Q4 2021
CMA CGM	London Gateway, Stanford le-Hope	107,000	A	Q1 2018
Co-Operative Supermarket	Unit 3 Tower Thurrock	100,000	A	Q1 2017
Ziegler UK Ltd	London Gateway, Stanford le-Hope	95,000	A	Q2 2019
Tiger Logistics	Thurrock 88	87,320	B	Q1 2019
Compagnie Fruitiere	London Gateway, Stanford le-Hope	70,000	A	Q4 2019
	Purfleet By Pass, Purfleet	61,486	B	Q2 2021
Restore PLC	Unit 1, Queen Elizabeth Distribution Centre, Purfleet	55,953	B	Q2 2018
Marstons	Unit C Logistics City, Motherwell Way, Thurrock	54,913	A	Q4 2018
Kuehne Nagel	736-738 London Rd, Purfleet	51,364	B	Q4 2019
Saint Gobain	Unit B Logistics City, Motherwell Way, Thurrock	49,408	A	Q1 2017
XPO Logistics	10 Thurrock Park Way, Tilbury	48,011	B	Q4 2019
Harrow Green	Unit D Logistics City, Motherwell Way, Thurrock	46,062	A	Q4 2017
CHEP plc	Stifford Rd, Aveley, South Ockendo	45,050	B	Q2 2017
Daygard Logistics	Unit2/ 2a Gateway 25, Weston Ave, Grays	43,633	B	Q3 2022
Tennants Distribution	799 London Rd, Grays	40,033	B	Q3 2021
Selco	Unit A Logistics City, Motherwell Way, Thurrock	36,867	A	Q1 2017
LF Logistics	Unit 2 Arisdale Ave, South Ockendon	33,167	B	Q1 2021
	B1/2 J31 Park, Motherwell Way, Thurrock	27,705	B	Q4 2018
Explore Transport Ltd	Stifford Rd, South Ockendon	26,081	B	Q1 2019
Smith Brothers Stores	Units 3&4, Oliver Close, Grays	24,753	B	Q3 2020
Trunk Logistics	Units 1 - 3 Globe Industrial Estate, 46 Rectory Rd,	23,332	B	Q2 2021
Galaxy Insulation & Dry Lining	5 Weston Ave, Thurrock	21,759	B	Q4 2019
PTS	Unit 22, West Thurrock Trade Park, Thurrock	21,158	B	Q3 2019
Aecom	Unit 10 Eurocourt, Oliver Close, Thurrock	19,627	B	Q2 2019
AGC (Commodity Store) Ltd	11 Eurocourt, Oliver Close, Grays	19,220	B	Q2 2019
AECOM	Oliver Close, Grays	19,032	B	Q2 2019
FSI Limited	Unit 3/4 Eurocourt, Oliver Close, West Thurrock	18,624	B	Q3 2020
Jerome Engineering Ltd	Rectory Rd, Grays	17,790	B	Q2 2019
AGC (Commodity Store) Ltd	Unit 6 Eurocourt, Oliver Close, West Thurrock	16,598	B	Q1 2021
	London Rd, South Ockendon	16,284	B	Q1 2020
Summit Platform	Kerry Ave, South Ockendon	15,257	B	Q3 2020

Occupier	Scheme name / unit	Size (sq ft)	Grade	Transaction Date
Builders Market Place Ltd	Motherwell Way, Grays	15,091	B	Q1 2021
Artis Accident Care	Unit 1, Gateway 25, Thurrock	14,544	B	Q3 2017
Conrad Energy	730 London Rd, Grays	13,996	B	Q1 2020
Ross-Shire Engineering Ltd	Unit 2, Oliver Close, Grays	13,964	B	Q3 2020
Techo	Unit 7, Cliffside Trade Park, Motherwell Way,	13,697	B	Q4 2018
Ross-shire Engineering	Unit 2 Eurocourt, Oliver Close, West Thurrock	12,591	B	Q3 2020
PCR Steel	Unit 6 St. Johns Road, Chadwell St. Mary, Grays	12,201	B	Q1 2022
Artis Accident Care	Unit 3, Gateway 25, Weston Avenue, Thurrock	12,185	B	Q3 2021
Enterprise Flex-E-Rent Ltd	609 London Rd, Grays	11,465	B	Q2 2021
	Unit 8, Kier Trade City, Motherwell Way, Thurrock	11,324	A	Q3 2018
Tructyre Fleet Management	795 London Rd, Grays	10,999	B	Q3 2019
	Unit 14, Coward Industrial Estate St. Johns Rd, Grays	10,526	B	Q3 2022
	2-6 Oliver Close, Grays	10,522	B	Q4 2019
	Towers Rd, Grays	10,000	B	Q4 2019
Tool Hire Company THC Limited	730 London Rd, Grays	9,466	B	Q3 2021
Foley and Miles	732 London Rd, Grays	9,223	B	Q1 2022
Imagination	Unit 5, Kier Trade City, Motherwell Way, Thurrock	9,203	B	Q2 2018
Optare Group	2-6 Oliver Close, Grays	9,009	B	Q4 2017
	730 London Rd, Grays	8,738	B	Q3 2021
GND Motors	Oliver Close, Grays	8,592	B	Q4 2021
	Motherwell Way, Grays	8,558	B	Q3 2018
S&B Commericals Plc	Unit 7, Kier Trade City, Motherwell Way, Thurrock	8,558	A	Q2 2017
S&B Commercial	Unit A2, Motherwell Way, West Thurrock	8,558	B	Q1 2017
PMP Manufacturing Ltd	Unit A2B, J31 Park, West Thurrock	8,558	B	Q4 2017
J. Rotherham	Unit 7, Kier Trade City, Motherwell Way, Grays	8,482	A	Q1 2019
D&C Glass & Glazing	Weston Ave, Grays	8,416	B	Q2 2017
Apj Works Ltd	10D Askew Farm Ln, Grays	8,268	B	Q1 2022
Hayley Group Plc	Unit 2, Kier Trade City, Motherwell Way, Grays	7,976	B	Q1 2020
	Wouldham Rd, Grays	7,322	B	Q4 2017
Bobcat	Oliver Close, Grays	7,239	B	Q1 2018
Allied Engines Limited	31-32 Towers Rd, Grays	7,066	B	Q3 2021
Romford Group	Thurrock Park Way, Tilbury	6,868	B	Q2 2020
	Weston Ave, Grays	6,041	B	Q4 2021
Dulux Decorator Centre	Unit 4, Kier Trade City, Motherwell Way, Thurrock	5,813	A	Q3 2018
Lockwell International	Unit 3 Purfleet Trade Parc, Ensign Industrial Estate,	5,730	B	Q2 2022
	J31 Park, Motherwell Way, Thurrock	5,597	B	Q3 2020
Direct Wood Flooring	Unit 9 Kier Trade City, Motherwell Way, Thurrock	5,565	A	Q2 2017
Bleach Products	6 Motherwell Way, Grays	5,430	B	Q1 2018
	Botany Way, Purfleet	5,380	B	Q3 2021
	Unit 6 Purfleet Trade Parc, Ensign Industrial Estate,	5,380	B	Q2 2022
	Unit 14, Juliet Way, South Ockendon	5,133	B	Q4 2020
	12 Cliffside, Grays	5,000	B	Q4 2018
	St Johns Rd, Grays	4,876	B	Q1 2017
	St Johns Rd, Grays	4,876	B	Q2 2017
Batch Organics	Oliver Rd, Grays	4,842	B	Q3 2017
Channel Engineering Ltd	Juliette Way, South Ockendon	4,810	B	Q3 2017
Versatile & Stone	Unit 3 Kier Trade City, Motherwell Way, Thurrock	4,790	A	Q1 2018
	730 London Rd, Grays	4,660	B	Q4 2021
	730 London Rd, Grays	4,601	B	Q2 2020
Marlow Services Limited	730 London Rd, Grays	4,601	B	Q2 2021
	6 Motherwell Way, Grays	4,576	B	Q4 2021
Euro Packaging	Dolphin Way, Purfleet	4,402	B	Q2 2018
Crown Decorating Centres	Unit 11, Kier Trade City, Motherwell Way, Thurrock	4,306	A	Q2 2018
	Magnet Rd, Grays	4,067	B	Q3 2020

Occupier	Scheme name / unit	Size (sq ft)	Grade	Transaction Date
	Motherwell Way, Grays	4,017	B	Q2 2018
	Kier Trade City, Motherwell Way, Thurrock	3,944	A	Q2 2017
Kelly communications	East Thurrock Rd, Grays	3,940	B	Q4 2017
PBA Signs & Graphics UK Ltd	Oliver Rd, Grays	3,876	B	Q3 2017
	Star Industrial Estate, St Johns Road, Chadwell St	3,689	B	Q1 2022
	J31 Park, Motherwell Way, Thurrock	3,656	B	Q3 2020
Drainfast	Oliver Rd, Grays	3,562	B	Q3 2017
Elliotts	Wouldham Rd, Grays	3,500	B	Q1 2018
Simpli Interior	53 Towers Rd, Grays	3,489	B	Q3 2021
	Oliver Rd, Grays	3,293	B	Q3 2021
G & S Tyres	47 King St, Stanford Le Hope	3,062	B	Q2 2018
Chandlers MOT Service	Juliette Way, South Ockendon	3,045	B	Q3 2017
	Unit 8 Clipper Park Industrial Units, Thurrock Park	3,031	B	Q2 2022
	St Johns Rd, Grays	3,000	B	Q3 2017
Essex Classic	Curzon Dr, Grays	2,928	B	Q3 2017
Upside Down House Ltd	Magnet Rd, Grays	2,843	B	Q4 2021
HydroQuip	Eastern Ave, Grays	2,796	B	Q1 2017
	East Thurrock Rd, Grays	2,766	B	Q3 2020
Rich Aroma Ltd	Magnet Rd, Grays	2,730	B	Q2 2019
Manafukrun	Botany Way, Purfleet	2,674	B	Q1 2019
	E6 J31 Business Centre, Motherwell Way, West	2,586	B	Q2 2022
A & M Forklift	Eastern Ave, Grays	2,535	B	Q2 2017
AM Fork Trucks	Unit 13, The Glade Business Centre, Eastern Ave,	2,400	B	Q1 2017
BMB Steel Structures Ltd	St Johns Rd, Grays	2,250	B	Q3 2021
Tructyre ATS	Oliver Rd, Grays	2,209	B	Q4 2017
	Oliver Rd, Grays	2,209	B	Q4 2021
	Rectory Rd, Grays	2,200	B	Q2 2021
JS Garden Reclaim Limited	Botany Way, Purfleet	2,180	B	Q3 2019
	Botany Way, Purfleet	2,180	B	Q2 2020
AJ Motorsport	St Johns Rd, Grays	2,016	B	Q3 2021
	Thurrock Park Way, Tilbury	1,994	B	Q3 2020
	Thurrock Park Way, Tilbury	1,994	B	Q1 2022
	St Johns Rd, Grays	1,900	B	Q2 2017
Hydraquip	Unit 9, The Glade Business Centre, Eastern Ave,	1,808	B	Q2 2017
	Botany Way, Purfleet	1,775	B	Q2 2018
	Rectory Rd, Grays	1,709	B	Q4 2017
Concept Motors Ltd	3A Magnet Rd, Grays	1,600	B	Q1 2022
	St Johns Rd, Grays	1,500	B	Q3 2020
Crayford Freight Services	1 Towers Rd, Grays	1,411	B	Q1 2019
	Thurrock Park Way, Tilbury	1,400	B	Q4 2021
	St Johns Rd, Grays	1,329	B	Q2 2017
	Juliette Way, South Ockendon	1,320	B	Q1 2022
	Unit 2 Thurrock Commercial Centre, Purfleet	1,300	B	Q1 2022
	799 London, Grays	1,157	B	Q2 2020
	Rectory Rd, Grays	1,063	B	Q1 2020