

THURROCK BOROUGH COUNCIL

EMPLOYMENT LAND REVIEW UPDATE

February 2010

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SECTION 1: INTRODUCTION

- 1.1 This report assesses the supply and demand for employment land and premises (Class B use) in the Thurrock Borough Council area. The Thurrock Employment Land Review (2010) forms part of the evidence base that informs Thurrock's Local Development Framework. This document provides sound evidence to inform planning for employment land uses. Thurrock Borough Council has undertaken a Preferred Options Consultation for both its Core Strategy DPD and Site Allocations DPD. The submission stage of the Core Strategy is expected to be undertaken early in 2010.
- 1.2 Thurrock has undertaken two previous economic studies, the 'Thurrock Council Employment Study 2005' prepared by Bone Wells Associates and the 'Thurrock Employment Land Review 2007' prepared by URS. In addition a third employment document titled 'An Assessment of Class B Land in Thurrock' was prepared by Atkins in 2008 on behalf of the Thurrock Thames Gateway Development Corporation (TTGDC). The Thurrock Employment Land Review (2010) updates the evidence ascertained in each of the three economic studies and builds upon the evidence and analysis undertaken with new research. It also draws upon advice and guidance contained within the East of England Employment Land Review Guidance Manual (2008). A further document that assesses the employment capacity of proposed industrial and commercial sites, as identified by the Preferred Options Consultations to the Core Strategy, the Site Allocations DPD and other sources, has been prepared by Tribal and is published in parallel to this document in early 2010. It is called the *Employment Sites Review*.
- 1.3 The Thurrock Employment Land Review (2010) provides a review of the 'Existing Employment Sites' identified by the Thurrock Local Development Framework to determine the extent to which these sites contribute to Thurrock's existing and future economies. The Thurrock Employment Land Review (2010) assesses and evaluates the level and quality of existing employment land in order to identify a supply of employment sites that have realistic prospects of contributing towards the economic aspirations for the Borough. For completeness, the review also refers to potential employment sites. Thurrock's portfolio of employment land must meet the needs of the market, deliver sustainability objectives and provide sufficient land in an appropriate form and location to meet the needs of industry and commerce.

(i) Locational Context

- 1.4 Thurrock Borough is situated in the Essex Thames Gateway sub-region of the East of England. The Thames Gateway in South Essex covers broadly the area east of the M25, bounded to the south by the River Thames and to the north by the A13 as far as Basildon, then the A127 as far as Southend-on-Sea. It spans the five districts of Basildon, Castle Point, Rochford, Southend-on-Sea and Thurrock.
- 1.5 South Essex fulfils two broad roles in relation to London, the wider region, and the UK. Firstly, it is a significant economic sub-region that specialises in producing energy, manufacturing goods and distribution. South Essex provides approximately 70% of London's port capacity and manufactures 10% of UK transport fuel. Secondly, South Essex provides an important leisure destination that offers an attractive coast line, distinctive estuarial

wetlands, popular resorts and open countryside. The Lakeside Basin is one of the largest aggregations of retail floorspace in Western Europe and attracts 30 million visitors annually.

- 1.6 Located on the eastern edge of London, Thurrock is a key commercial centre for South Essex. The Thurrock Core Strategy Preferred Options and Pre-Submission DPDs identify five principal growth hubs at the London Gateway, Tilbury, Grays, Purfleet and Lakeside Basin/West Thurrock. These hubs will act as a catalyst and focus for the regeneration of the Borough as a whole.
- 1.7 At London Gateway, a new deep water port has been consented and once implemented will become one of the main economic drivers in the South Essex Thames Gateway. This scheme will be of national importance to the future of the UK port and logistics industry. Tilbury is a thriving port facility and a major employer in the Borough with potential for further expansion. Grays is the dominant town centre in Thurrock and has been identified to become the administrative and learning hub for the Borough. Lakeside Basin/West Thurrock is an established regional retail, warehouse and distribution and leisure destination which has been identified by the East of England Plan Single Issue Review for further expansion as a Regional Centre. Purfleet has a number of key employment and residential sites that together present an opportunity to create a new mixed community, with good public access to the riverside.

(ii) Report Structure

- 1.8 This report sets out the findings and policy recommendations for employment land in Thurrock Borough, based on a comprehensive desk review and socio-economic analysis; individual employment area/cluster and site appraisals; review of historical trends in the commercial and industrial property sectors; and a forecasting exercise. The report is structured as follows:
 - Section 2 sets out the national, regional and local policy context of particular relevance to employment land and related issues in Thurrock Borough;
 - Section 3 provides a comprehensive analysis of economic baseline conditions in Thurrock Borough;
 - Section 4 describes the employment land and property markets in Thurrock Borough with reference to the trends in the commercial and industrial property sectors;
 - Section 5 sets out the key findings of the employment site audit;
 - Section 6 assesses the future demand and supply for employment land in Thurrock; and
 - Section 7 presents conclusions and recommendations on retention and release of employment land sites.

SECTION 2: KEY PLANS, POLICIES AND STRATEGIES

2.1 An important part of the Employment Land Review process is to establish the direction of key policies plans and strategies at the national, regional and local levels. The East of England Employment Land Review Guidance Manual (2008) states that the policy context for employment land is an essential component of an employment land review as it establishes the strategic and local context in which local authorities should develop their employment land policies. The following section sets out the key plans, policies and strategies relevant to Thurrock.

(i) National Plans, Policy and Strategies

a) PPS4: Planning for Sustainable Economic Growth (2009)

2.2 Planning Policy Statement 4 (PPS4) was published in December 2009 and replaces Planning Policy Guidance Note 4: Industrial, Commercial Development and Small Firms (PPG4, 1992), Planning Policy Guidance Note 5: Simplified Planning Zones (PPG5, 1992) which will be republished as practice guidance and Planning Policy Statement 6: Planning for Town Centres (PPS6, 2005). It will also replace the objectives (i-iii) and paragraphs 1 (ii-vi), 2, 3, 4, 5, 6, 7, 16 (i-ii), 17, 18, 19, 30 (i-ii), 32, 34 (i-ii), 35, 36, 37, 38, 39, 40 of Planning Policy Statement 7: Sustainable Development in Rural Areas (PPS7). Note that objective (iv) and paragraph 22 of PPS7 are not cancelled and remain extant. Paragraphs 53 and 54 of Annex D to Planning Policy Guidance 13: Transport (2001) remain extant until local planning standards are put in place under policy EC8 of PPS4.

2.3 PPS4 defines economic development as development that falls within the Class B uses, public and community uses and town centre uses (including retail, leisure, offices and culture) and other development which achieves at least one of the following objectives whether in urban or rural areas:

- Provides employment opportunities;
- Generates wealth; or
- Produces or generates an economic output or product.

2.4 PPS4 requires planning authorities to prepare, and maintain, a robust evidence base to understand both existing business need for land or floorspace and likely changes in the market. The evidence base should underpin development plan policies which support sustainable economic development in their area, allow a quick response to changing economic circumstances and inform decisions on planning applications. Annex C of the PPS sets out a range of economic and social data which can be used by planning authorities when preparing their development plan documents. This evidence includes, but is not restricted to:

- Assessment of employment by broad sector;
- Assessment of the population and workforce in terms of: qualifications; occupations; earnings; house affordability; population change; unemployment; travel patterns; deprivation;
- Assessment of employment patterns and economic activity rates;
- Assessment of business size;
- Assessment of VAT registrations and de-registrations;

- Assessment of gross value added;
 - Assessment of existing floorspace;
 - Assessment of land property markets through: floorspace availability by rent and size; rents by grade; office land values; construction rates; stock condition
- 2.5 Policy EC1.3(d) states that the evidence based produced by local authorities should 'assess the existing a future supply of land available for economic development, ensuring that existing site allocations for economic development are reassessed against the policies in PPS4, particularly if they are for single or restricted uses. Where possible, any reviews of land available for economic development should be undertaken at the same time as, or combined with, strategic housing land availability assessments'.
- 2.6 PPS4 requires planning authorities to ensure that their development plan sets out a clear economic vision and strategy for their area and identifies priority areas for regeneration and investment such as areas with high levels of deprivation. Flexible support for existing business sectors, and new or emerging sectors and the clusters they may form is also required. The need to make the most efficient and effective use of land, taking into account the different locational requirements of different businesses is also included, while the delivery of sustainable transport and other infrastructure should support such requirements. Planning authorities should prioritise previously developed land which is suitable for re-use and appropriate in terms of site size, quality, access, proximity of markets and availability of a local workforce.
- 2.7 Planning authorities must ensure that, where it is necessary to safeguard land from other uses, their development plan identifies a range of sites, to facilitate a broad range of economic development, including mixed-use. Existing site allocations should not be carried forward from one version of the development plan to the next without evidence of the need and reasonable prospect of their take up during the plan period. If there is no reasonable prospect of a site being used for economic purposes during the plan period, the allocation should not be retained, and wider economic uses or alternative uses should be actively considered.
- 2.8 Policy EC2.1 seeks to encourage new uses for vacant or derelict buildings including historic buildings. It also notes that different business types can be delivered through use of CPO, Area Action Plans, simplified planning zones & LDOs and that local authorities should seek to facilitate new working practices such as live/work. Policy EC2.1(b) encourages a 'flexible approach to the supply and use of land'.
- 2.9 Policy EC3: Planning for Centres, requires local authorities to set out a strategy for the management and growth of centres over the plan period, including flexible policies which can respond to changing economic circumstances and encourage, where appropriate, high density development accessible by public transport, walking and cycling. Local authorities are also required to define a network and hierarchy of centres that is resilient to future economic changes.
- 2.10 Policy EC9: Monitoring, requires local planning authorities to utilise their annual monitoring reports to review the network and hierarchy of centres, the need for further development and the vitality and viability of centres (at the

local level). Local authorities are also required to regularly collect market information and economic data, on key indicators relating to economic development.

- 2.11 Policy EC10 relates to the determination of planning applications for economic development. Policy EC10.1 applies to all applications for economic development stating that 'planning applications that secure sustainable economic growth should be treated favourably'. Policy EC10.2 lists a series of impact considerations that all economic development applications should be assessed against but significantly, does not recommend refusal if applications are not judged favourably against the impacts.
- 2.12 PPS4 introduces the requirement for LPAs to prepare a 'Local Economic Assessment' that is to be used as an evidence base through which to underpin development plan policies and support economic development. This requirement is also set out in the Local Democracy, Economic Development and Construction Act, enacted in late 2009. In response to this requirement the Planning Advisory Service (PAS) published a consultation document, 'How to do a Local Economic Assessment', in July 2009.
- 2.13 The PAS document sets out the proposed guidance requirements and methodology that should be included within a 'Local Economic Assessment'. The emphasis is placed upon creating a single evidence base document that can be used to inform key strategies and agreements such as: Local Area Agreements; the Sustainable Community Strategy; the Local Development Framework; and the Integrated Regional Strategy. It also suggests that the first assessment should be treated as an opportunity to learn and develop internal capacity in preparation for a refresh and fuller exercise in 2013, which will be the earliest date at which to assess the 2011 Census data.

c) ODPM: Thurrock UDC Baseline Study (2004)

- 2.14 The Thames Gateway Strategic Executive, within the Office of the Deputy Prime Minister (ODPM), appointed MCA Regeneration and consultants from Cluttons Planning & Development and Ernst & Young to provide a detailed report setting out the social, economic, environmental and physical characteristics of Thurrock Unitary Authority area. They summarised their key findings in relation to the Thurrock economy as follows:
 - Thurrock has experienced above-average employment growth, largely based on Lakeside Retail Centre and Park.
 - Port and related transport logistics, distribution and industrial activity is a second major sector strength, along Thurrock's river and estuary front.
 - In regional strategy terms, Thurrock has not been a focus of attention for economic development and competes for attention with the Cambridge/M11 corridor and other disadvantaged centres (Luton, Harlow).
 - Agency partners in Thurrock are aware of local strengths and weaknesses and the need to develop a more balanced sector structure in the economy, based on higher skilled activity.
 - Employment is now heavily concentrated in West Thurrock, around M25 junctions and the Dartford crossing. This places a heavy traffic burden on roads. There is also a problem with industrial areas being adjacent to residential areas.

- The industrial areas to the north (Aveley / Ockendon) and east (Coryton) have experienced greater economic decline and therefore are in need of restructuring and renewal.
- The port logistics sector is facing a critical stage of development, with the prospects of either massive upgrading via P&O London Gateway at Shell Haven, or possible decline through UK ports competition.

(ii) Regional Plans, Policy and Strategies

a) The East of England Plan: Regional Spatial Strategy for the East of England (2008)

- 2.15 The East of England Plan provides the Regional Spatial Strategy (RSS) for the region. Local Development Documents must be in general conformity with the RSS. The RSS aims to guide development in the East of England for the next 20 years and covers housing, economic development, the environment, transport, sport and recreation, waste development and mineral extraction. The East of England Plan has a strong jobs-led strategy. The review of the RSS is scheduled for completion in 2011.
- 2.16 Policy SS5 relates to priority areas for regeneration. This policy describes the priority areas for regeneration as being areas with generally weak economic performance and significant areas of deprivation. The Essex Thames Gateway is identified as an area that displays these characteristics. Local Development Documents are required to set out policies to tackle the problems of economic, social and environmental deprivation in the priority areas for regeneration.
- 2.17 Policy E1 addresses job growth in the region. The policy sets out indicative targets for net growth in jobs for the period 2001-2021. The policy requires Local Development Documents to provide an enabling context to achieve these targets. The Essex Thames Gateway sub-region, which includes Thurrock, Basildon, Southend-on-Sea, Castle Point and Rochford, is required to achieve an indicative net jobs growth of 55,000 jobs between 2001 and 2021.
- 2.18 Policy E2 sets out the principles for the provision of employment land. This policy requires Local Development Documents to ensure that an adequate range of sites and premises are allocated to accommodate the full range of sectoral requirements to achieve the indicative job growth targets of Policy E1. These include sites within mixed-use areas and town/district centres.
- 2.19 Paragraphs 13.14 to 13.18 set out the context for the Essex Thames Gateway sub-region. It is noted that the Essex Thames Gateway presents a unique development opportunity that is reflected by its extensive areas of previously developed land, its proximity to central London, international transport links and access to continental Europe. It is stated that urban regeneration coupled with wider environmental enhancements will enable major improvements in quality of life and regional economic performance.
- 2.20 It is also states that the Essex Thames Gateway contains the biggest assembly of port infrastructure in the region and that reference is made to the London Gateway container terminal and that supporting infrastructure is planned on the former oil refinery site at Shellhaven in East Thurrock.

- 2.21 Policy ETG1 sets out the strategy for the sub-region. It is stated that the strategy aims to substantially increase the numbers of jobs and homes in line with Policies E1 and H1 to bring about a better alignment of homes and workplaces while continuing to recognise and make the most of the area's complementary role in relation to London.
- 2.22 Policy ETG2 specifically addresses Thurrock's role as a Key Centre for Development and Change. A Single Issue Review of the policy was undertaken and an Examination in Public was held in July 2009. When published by the Secretary of State in January 2010, the single issue review provided a revised Policy ETG2 which establishes the northern part of Lakeside Basin as a new Regional Centre and provides a strategy for the regeneration and remodelling of the wider Lakeside Basin and West Thurrock area.
- 2.23 Policy ETG2 states that Local Development Documents should promote an urban renaissance, re-use previously developed land and make best use of the Thames Riverside to bring about substantial improvement in the quality of the urban environment. It is also stated that Local Development Documents should:
- Upgrade the image of the area as a leading centre for logistics, and enhance the scale and sustainability of its role in that respect, while also seeking to diversify the employment base of the borough;
 - Safeguarding wharves and quays necessary for the strategic functioning of the Port of London;
 - Secure the transformation of the northern part of Lakeside Basin as a town centre; and
 - Develop complementary policies for the regeneration of Grays town centre and other urban centres in the borough.
- 2.24 In addition, the policy states that Local Development Documents should guide the regeneration and remodelling of the wider Lakeside Basin and West Thurrock Area on sustainable mixed use lines by:
- defining the boundary of the area
 - providing for a broader employment base through the identification of key strategic employment sites;
 - promoting a high quality built environment and public realm that is more coherent, legible and integrated;
 - protecting and enhancing green infrastructure including the provision of further accessible natural green space to meet local standards;
 - promoting a greater mix of uses, including additional residential, office, hotel, and assembly and leisure activities
 - improving the range of services and facilities
 - securing more sustainable movement patterns, reduced private motor vehicle dependence and complementary travel demand management measures including an area-wide travel plan;
 - improving local accessibility and connectivity by public transport and pedestrian and cyclist permeability throughout the area including consideration of ways to reconnect the north and the south of the area, a new high frequency service rail station in the south, and a personal rapid transport system, and;

- providing the necessary improvements to the local and strategic road network.
- 2.25 The attainment of Regional Centre Status for the northern part of Lakeside Basin is conditional upon the adoption of Local Development Documents.
- 2.26 Policy ETG2 also states that retail expansion at the new Regional Centre should be limited to 50,000m² of net comparison floorspace by 2019 together with an appropriate amount of convenience floorspace to reflect the Borough's population growth.
- 2.27 Policy ETG5 addresses employment generating development in the sub-region. It is stated Local Development Documents should provide an enabling context for not less than 55,000 net additional jobs in Essex Thames Gateway during the period 2001-2021 with Thurrock providing 26,000 of these jobs. It is stated that the relevant authorities should facilitate these increases in jobs by promoting a competitive sub-regional business environment secured through:

- The provision of a range of sites and premises suitable for the needs of existing and future businesses, including the development at London Gateway, a new container port facility with associated business park and rail freight handling facilities and other sites that will support Thurrock's role as a leading logistics centre;
- The provision of innovation centres at the key centres for development and change;
- Improving opportunities for small and medium enterprises in all economic sectors, especially transport and logistics, environmental technologies, healthcare, tourism and leisure;
- Raising skill levels at NVQ Level 2, 3 and 4 to national averages through enhanced provision of further and higher education;
- Focusing major retail, leisure and office developments at Basildon, Southend, Lakeside and other centres in need of regeneration and renewal; and
- Enhancing use of the River Thames as an asset for business and leisure.

b) The Regional Economic Strategy for the East of England 2008–2031

- 2.28 The East of England Regional Economic Strategy 2009 (RES) assesses the region's strengths and weaknesses and the major trends that will affect businesses and communities over the next 20 years and sets out a long-term vision for the region's economy. The East of England is increasingly linked with London and the South East in terms of labour and housing markets. Taken together, the 'Greater South East' is Europe's leading super-region.
- 2.29 The key objectives of the RES are as follows:
- To improve economic performance across the region;
 - To compete in the new global economy;
 - To embrace change – demography, health and work;
 - To provide infrastructure for a competitive and sustainable economy;
 - To remain at the forefront of innovation;
 - To improve skills to meet changing demand;

- To ensure the region is an attractive place to live, work and do business; and
 - To manage the environmental impacts of growth.
- 2.30 The RES aims to increase the employment rate to 70% of 16 to 74 year-olds and 80% of the working-age population by 2031(from 67% and 77% respectively in 2007) – equal to 424,000 more residents in employment.
- 2.31 The RES considers ‘skills’ to be central to how productive a business can be. It is noted that the demand for higher-level skills is increasing and employment prospects for the least skilled people are falling, however, the region’s working-age population is more poorly qualified than the national average. The RES aims to ensure that 95% of adults have good basic skills by 2020 and that this is maintained to 2031.
- 2.32 The RES considers that ‘inequality’ can slow economic growth and affects people’s quality of life. Consequently, the RES aims to raise lower-quartile earnings to 60% of average earnings over the lifetime of the strategy.
- 2.33 The RES also seeks to reduce carbon dioxide emissions to 60% below 1990 levels by 2031– equivalent to reducing total CO2 emissions to 6.6 million tonnes of carbon from 12.2 million tonnes of carbon in 2005.
- 2.34 The RES seeks to increase economic participation. It is envisaged that this will be achieved by equipping people with the confidence, skills and choices for employment and entrepreneurship. A critical part of this strategy is to tackle the barriers to employment in the poorest 20% of communities and increasing economic demand in areas with low activity rates.
- 2.35 The RES seeks to develop a spatial economy that will attract and retain high quality people and the investment necessary to develop a world-class economy. To achieve this, the RES seeks to encourage a better balance between housing and employment opportunities, whilst ensuring a high-quality supply of employment land throughout the region.
- 2.36 The prosperity of the East of England is closely tied to the success of London, the world’s leading financial centre. This is most obvious in the high levels of people commuting into London and the increase in the number of people moving from London to live in the East of England. Increasingly, the East of England is playing vital, complementary roles to London and the wider South East. This includes the East of England’s role as one of the EU’s leading centres of private-sector research and development and the UK’s port gateway to global markets.
- 2.37 The RES identifies seven ‘engines of growth’, which include Thames Gateway South Essex. The RES considers that the success of this area is vital to the continued success of London and the East of England. It is noted that South Essex accounts for around 240,000 jobs, with 88,000 people commuting from the area to London each day. The sub-region has strengths in ports and logistics, advanced manufacturing, automotive design, retail and services. Major challenges include improving people’s skills, connectivity and urban regeneration. The following objectives for the Thames Gateway South Essex are set out in the RES:

- To improve the workforce's skills by providing employer-led learning opportunities and creating 21st-century education facilities, including schools, new university campuses and skills academies;
- To reinvent the centres with thriving retail and leisure facilities and residential properties to complement the growth of Thurrock Lakeside;
- To become a major EU port and logistics cluster, including developing the London Gateway and maintaining the success of the Port of Tilbury;
- To develop as a centre for investment in environmental technology and services, including potential leadership in automotive energy-efficiency in Basildon and a new bio-energy park in Thurrock;
- To become a specialist centre for the creative industries, including the Production Campus and Creative National Skills Academy in Thurrock and facilities in Southend-on-Sea;
- To tackle major congestion in the road and rail network, including junction 30 of the M11, the A127 and A13.

(iii) Sub-Regional Plans, Policy and Strategies

a) Thames Gateway: The Delivery Plan (2007)

- 2.38 The Thames Gateway: The Delivery Plan, published in 2007, (the Delivery Plan) seeks to provide the mechanism through which to deliver the Government's objectives for the Thames Gateway sub-region. The Plan provides a framework for making the best use of public investment, local ownership, big project expertise and private sector entrepreneurship. It sets out a proposed spending programme for 2008-11 which includes £500 million for regeneration and £100 million for local transport improvements. The Delivery Plan is structured around the three driving forces for positive change in the Gateway: a strong economy; improvements in the quality of life for local communities; and the development of the Gateway as an eco-region.
- 2.39 As an existing achievement, the Delivery Plan refers to the planning permission for the London Gateway, a new international deep-water port and business park.
- 2.40 The Delivery Plan gives priority in its spending allocations to six priority locations for local community investment. Thurrock is one of those priority locations.
- 2.41 The Delivery Plan seeks to make the most of the economic potential of the Gateway, encourage new investment and jobs, and boost the skills of local people so that local communities can benefit from growing prosperity. The Delivery Plan sets out the following commitments:
- An increase in the number of new jobs expected in the Gateway to 225,000 by 2016;
 - A £200 million Strategic Economic Investment Fund to support priority projects from the RDA's Thames Gateway Economic Development Investment Plan;
 - A Pan-Gateway Skills Plan developed by the Learning and Skills Councils to invest £1.6 billion in teaching and learning, and £850 million in new building for further education;
 - The building and opening of new further and higher education campuses, such as at Grays, creating around 9,000 further education places across the sub-region;

- An allocation of £100 million from the Community Infrastructure Fund to invest in 13 local transport schemes.

2.42 The Delivery Plan states that there is a need to improve the quality of life in the sub-region by: building more affordable houses; investing in thriving town centres; creating new public places and spaces; and improving the quality of public services and support community cohesion. The Delivery Plan sets out the following measures in which to improve the quality of life in the Thames Gateway:

- To prioritise funding to secure housing programmes in the ten locations where extra homes are most urgently needed. These ten programmes are expected to deliver nearly 110,000 homes by 2016;
- Housing Corporation intends to invest over £800 million in around 15,000 affordable homes;
- Communities and Local Government will ask the Commission for Architecture and the Built Environment (CABE) to undertake a further Housing Audit in the Gateway in 2010 to measure progress in improving design quality;
- Planned spending of over £600 million in this CSR period as part of a longer term £1.4 billion programme on new or refurbished hospital provision serving the Gateway;
- Planned investment of £1.2 billion on schools in Gateway authorities, as well as £278 million allocated for Sure Start centres including 90 new ones;
- The appointment of Sir Terry Farrell as Design Champion for the Thames Gateway Parklands, a new programme to celebrate and enhance the individual character of the Gateway backed by a £35 million allocation of Thames Gateway funding to invest in improving the natural and urban environment.

2.43 The Delivery Plan seeks to develop an eco-region by combining increasing economic growth, development and prosperity with tackling climate change. The Delivery Plan seeks to pioneer new environmental technologies and approaches of the future. This plan promotes higher standards for cutting carbon emissions, water conservation, reducing waste, and protecting people against flood risk. The Delivery Plan puts forward the following measures:

- Department of Communities and Local Government will invite proposals for a new Eco-Quarter in the Gateway;
- A commitment to 80% of new homes being built on brownfield land;
- £2million available to promoters and developers to fund eco-assessments of the top ten housing programmes, to ensure they will design-in climate change mitigation, flood risk management, energy and water efficiency;
- Planned investment of £15 million in a community-focused programme to retrofit existing homes with energy saving measures that will reduce emissions by up to 60%;
- An allocation of £1.5 million from the Thames Gateway fund to work with the Energy Savings Trust to establish the first of the new national energy service centres to deliver the Green Homes Services across the Gateway;
- Work on the costs and possible delivery mechanisms for a zero construction waste target across the Gateway;
- Investment by the RDAs in an International Institute for Sustainability.

b) Thames Gateway South Essex Economic Strategy

- 2.44 The Thames Gateway South Essex Economic Development Strategy was published in November 2007 by the Thames Gateway South Essex Partnership (TGSEP). The Strategy sought to build on previous work by the Partnership setting out the vision for the sub-region, summarised as follows:

“Our overriding aim is to provide an improved quality of life for all the people of South Essex, and to allow the area to participate, via the Thames Gateway initiative, in the prosperity of the wider South East and East of England.”

- 2.45 The Strategy sets out some of the key challenges for enhancing economic growth. These are described as follows:

- Low productivity – With the exception of Basildon, low levels of productivity exist in all TGSE areas relative to the national levels.
- Low business survival rates – All areas apart from Basildon and Rochford have below average 3-year survival rates.
- High Levels of Out-commuting – Of approximately 300,000 workers resident in the sub-region, some 88,000 out-commute (compensated partly by some 31,000 in-commuters). Often those with higher-level skills and professional employment commute to outside the sub-region.
- Low skills – In the TGSEP area, those with no qualifications are well above the East of England and national average of 12.5% and 13.1% respectively.
- Poor inward investment – TGSE has a relatively poor perception as a place to do business, which has resulted in a poor track record of inward investment.

- 2.46 The Economic Development Strategy identifies the following principal locations for economic growth and job creation over the next 15 years:

- Shellhaven and Tilbury Ports – creating world class logistics and distribution facilities;
- Town centres and other smaller centres – building high quality places for new retail, leisure and office development in Basildon, Southend and Grays, and more local services in Purfleet, Canvey Island and other smaller settlements;
- A127 Enterprise Corridor – supporting the growth of high tech manufacturing and light industry;
- Lakeside Basin/West Thurrock – developing the retail and leisure offer; and
- Southend Airport and adjacent business activities – servicing companies in the sub-region and supporting aviation related employment.

- 2.47 The Economic Development Strategy states that these are critical projects of sub-regional and regional significance and without which, the overall scale of planned regeneration and growth of TGSE will not be delivered.

2.48 The Economic Development Strategy identifies the following key characteristics of the sub-regional economy:

- Evidence of an entrepreneurial spirit - All TGSE districts, with the exception of Rochford, display higher rates of 'business churn' (business start-ups and exits) over the period 2001 to 2005 than Essex, East of England and national averages.
- Low three year survival rates that fall below the national (71%) and South East (73%) averages in all areas except Basildon (73%) and Rochford (74%). Recent figures show that the proportion of companies surviving their first three years in Castle Point and Thurrock stands at 69% and 68% respectively;
- Relatively low business density (firms per 10,000 residents) when compared to regional and national averages - which may be attributed to the number of large multinationals. In 2007, there were 407 firms per 10,000 residents in the UK and 461 in the South East. In contrast, Thurrock, at 295 firms, has the lowest business density of the five local authority areas.
- Existing strengths in manufacturing and engineering, logistics and distribution, and retail sectors. When compared with the national economy, the TGSE economy has over three times the number of people employed in the 'manufacturing of motor vehicles, two and a half times the number of people employed in the 'manufacturing of medical, precision & optical instruments' sector and one and half times as many employees in the retail sector. Thurrock's employment in logistics and transport is almost three times larger than the national average.
- The South Essex Economic Development Strategy identifies opportunities for further growth in: financial and business services; tourism and leisure; health and medical; creative industries; and environmental technologies.
- The TGSEP area has weak levels of activity in knowledge intensive or 'innovation-enabling' business services. South Essex has employment levels in Research and Development that are half the national average.

2.49 'Invest Thames Gateway' was launched at the Thames Gateway Forum in November 2008. The service will focus solely on foreign direct investment. Enquires will be passed to Invest Essex, the service developed over the last 18 months by ExDRA which is now up and running. Invest Essex provides both inward investment and investor developer services.

c) Thames Gateway South Essex: Economic Development Business Plan 2009 – 2011

2.50 The Economic Development Business Plan sets out the activities that the Thames Gateway South Essex Partnership (TGSEP) will take forward, commencing April 2009-2011, to support delivery of the South Essex Economic Development Strategy. All of the activities are those where local partners have recognised the need for a sub-regional approach to complement and enhance their own activities. With regard to these activities, the business plan focuses on TGSEP's role with respect to:

- Lobbying/championing – using the power of the Partnership where a collective voice carries greater weight in making the case for intervention than a single partner, e.g. lobbying DfT/Highways Agency/CLG for swifter action on Junction 30 of the M25;

- Leadership and accountability – providing a forum for debate and opportunity to provide leadership on key issues, such as a collective response to the expansion of Lakeside. In addition, TGSEP offers a vehicle for improving accountability and performance managing the delivery of economic development in the sub-region.
- Intelligence gathering and monitoring – assembling and analysing information to inform delivery, and monitoring progress against the long-term vision and growth targets for South Essex.
- Advocacy – supporting partners’ economic and regeneration objectives, influencing strategic decision making, responding to consultation exercises, and developing stronger links with county, regional, and Thames Gateway agencies.
- Coordinating activity – providing strategic oversight, ensuring that the delivery activities of partners are suitably joined and maximise benefits for the sub-region. This includes promoting a coordinated approach to capital and revenue funded economic development.

2.51 The Economic Development Business Plan refers to the growth agenda for Thurrock. With respect to unlocking physical regeneration in Thurrock, the TGSEP seeks to utilise the political power of the Partnership board to lobby Government and its agencies for intervention and/or investment to unlock critical barriers to development.

2.52 The Economic Development Business Plan refers to the Dubai Ports World proposal at London Gateway as the single largest investment in South Essex. It notes that the capacity of Junction 30/31 on the M25 will need to be increased to cater for the growth allocated to London Gateway, Thurrock and other growth taking place in South Essex.

2.53 The Economic Development Business Plan identifies the need for a more comprehensive business support offer in South Essex, which is responsive to the needs of local business. The key activities for TGSEP to take forward in the business plan include:

- Collating intelligence from each local authority, Essex business forums, chambers of commerce and the FSB on how the recession is affecting South Essex and undertaking a survey of businesses to understand how they are being affected;
- Exploring the need to undertake additional research on the scale of vulnerability, monitoring data on redundancies, and liaising with the Regional Intelligence Unit;
- Influencing Business Link, ECC, EEDA and Regional Economic Council activities for SMEs;
- Putting in place a Rapid Response Plan to respond to large closures, building on the Essex wide Rapid Response to Redundancy group and any measures local authorities have individually put in place.

2.54 The sub-region also has some large employees in vulnerable sectors, such as manufacturing and financial services. The TGSE propose to take a lead role in coordinating a more streamlined investment service for South Essex. The key activities of the TGSEP will include:

- Clarifying and communicating lines of responsibility for inward investment and business retention;

- Exploring the development of a rapid response plan;
- Defining the South Essex offer and strengthening communication channels with Invest Essex; and,
- Exploring opportunities to enter into a contract with Invest Essex to provide a dedicated TGSE resource.

(iv) Thurrock Borough Council and Thurrock Thames Gateway Development Corporation:

a) Economic Development Strategy for Thurrock (2008)

- 2.55 In the autumn of 2007 the Thurrock Thames Gateway Development Corporation appointed the consultants Regeneris to produce an economic development strategy for Thurrock. The Brief was to develop an innovative and broad-ranging Economic Development Strategy and Delivery Plan for the Thurrock Thames Gateway Development Corporation and Thurrock Council area.
- 2.56 The consultants undertook a detailed baseline study of the Borough, reviewed TTGDC's key documents and those of the partner agencies and completed a survey of more than 250 Thurrock businesses across the range of key industrial sectors. Based upon these results industrial strengths were identified as well as potential growth sectors within the Borough's economy.
- 2.57 Consultations were undertaken with around 75 partner and stakeholder organisations and meetings were held with existing partnerships and groups as the Strategy and Implementation Plan was developed. These groups included the Thurrock Learning Partnership, the Economic Development Working Group (part of the LSP) and the Thurrock Business Association.
- 2.58 The focus of the strategy is to create conditions that will stimulate business growth, inward investment and, subsequently, sustainable employment growth. Employment is at the heart of the strategy, to ensure that sufficient employment is created through growth and that it is accessible by Thurrock's growing population.
- 2.59 The components of the strategy are broken up into core economic sectors and opportunity sectors. The core sectors include: retail; port and logistics; and construction. Although no longer a growth sector the importance of the existing manufacturing base is recognised. The opportunity sectors are less established and will have to be induced to grow. These include: Business services, recreation and leisure, environmental, technology and creative.
- 2.60 The two strategy elements to bring about the aims and objectives are:
1. Enabling - to ensure that the foundation exists to maximise employment opportunities and investment. There are six Enabling Strategic Theme Objectives where interventions will help to achieve the following factors.
 - Generate a stronger skills base;
 - Improve the inward investment offer;
 - Develop a relevant business support offer and structures;
 - Ensure relevant physical infrastructure is in place;
 - Raise aspirations for growth locally;

- Improve partnership working.
2. Embedding factors – to ensure that employment and investment growth is both long term and sustainable. Thurrock needs to adapt to changes in core markets and continually create conditions for the migration of skilled people and high value-added businesses. There are five Embedding Strategic Theme Objectives where interventions will help to achieve the following factors.
- Tackle deprivation in communities;
 - Develop effective innovation capacity;
 - Improve quality of environment;
 - Ensure ongoing improvement of business spaces;
 - Develop effective business processes.

2.61 The strategy also identifies five economic hubs and key interventions that will act as a catalyst for economic growth. These hubs and interventions are:

- Purfleet, including Royal Opera House Production Park;
- Grays, including FE/HE Learning Campus;
- Lakeside and West Thurrock, including Lakeside Shopping Centre;
- Tilbury, including Port and power station proposals; and
- London Gateway, including the Port business park and training facility.

(v) Thurrock Borough Council:

a) Pre-Submission Core Strategy (2010)

2.62 Saved policies from the Thurrock Local Plan (1997) will be superseded by the Local Development Framework (LDF) when adopted. The LDF includes the Core Strategy Development Plan Document (Core Strategy), which is intended to be submitted in early 2010, and a Site Allocations Development Plan Document which remains at Preferred Options stage, following consultation undertaken in 2008. The Council is beginning to prepare an Area Action Plan for the Lakeside Basin, which will identify proposals to bring forward the diversification and redevelopment of the area. This will include the identification of new sites and the intensification of those existing, in order to provide increased employment from industry and commercial, mixed-use and retail and leisure sites.

2.63 The Core Strategy DPD is a strategic document providing broad guidance on the scale and distribution of development and the provision of supporting infrastructure. It sets out the spatial vision, spatial objectives, the spatial development option and policies for Thurrock to 2021 together with a monitoring and implementation framework. The Strategic Policies set out in the Core Strategy relate to housing, employment, communities, transport, the natural and built environment, climate change, water, waste and minerals.

2.64 The Core Strategy directly supports the delivery of the Thurrock Sustainable Community Strategy by ensuring that land and sites are made available for health, education, open space, industry and housing, together with improved accessibility to these facilities by all sections of the community.

- 2.65 Core Strategy Policy CSSP2 Sustainable Employment Growth sets out the Council's approach to monitoring and managing the supply of employment land to ensure and develop sufficient capacity to accommodate future employment growth and achieve an appropriate balance in supply and demand for employment land. This will enable Thurrock Council to ensure that the 26,000 net additional jobs to be delivered in the borough between 2001 to 2021, can be accommodated.

- 2.66 The approach that the Council has taken in Policy CSSP2 is to promote and support economic development in five Key Strategic Economic Hubs. The Council will direct inward investment to these hubs and will promote Flagship Developments within them in order to expand existing core sectors and/or provide opportunities in growth sectors.

- 2.67 The Purfleet Key Strategic Economic Hub is based on the existing core sectors of storage and warehousing, and freight transport. Growth sectors are identified as business services, recreation and leisure, and the creative industries. Indicative growth of 2,800 jobs is included in the policy, including those jobs based at the Royal Opera House Production Facility, High House.

- 2.68 The Lakeside / West Thurrock Basin Strategic Economic Hub is based on the existing core sectors of retail, logistics and transport, and construction. Growth sectors are identified as business services, retail, recreation and leisure. Indicative growth of 7,000 – 9,000 jobs (subject to the Lakeside Area Action Plan review) is included in the policy. Flagship Developments include Sustainable Business Centres and Incubators.

- 2.69 The Grays Key Strategic Economic Hub is based on retail. Growth sectors are identified as business services, recreation and leisure and public sector services. Indicative growth of 1,650 jobs is included in the policy. Flagship Developments include Thurrock Learning Campus and the Grays Community Business Centre.

- 2.70 The Tilbury Strategic Economic Hub is based on the existing core sectors of port activities, logistics and transport, and construction. Growth sectors are identified as business services, environmental technologies, recycling and energy. Indicative growth of 1,600 – 3,800 jobs is included in the policy. Flagship Developments include Tilbury Eco-Quarter and the expansion of Tilbury Riverside Business Area.

- 2.71 The London Gateway Strategic Economic Hub will be based on the core sectors of port activities, logistics and transport. Growth sectors are identified as environmental technologies, recycling and energy. Indicative growth of 11,000 – 13,000 jobs is included in the policy. Flagship Developments include a Training, Innovation and Research Facility, a Business and Distribution Park and a Renewable Energy Centre.

- 2.72 Other sites in borough, currently engaged in logistics, freight transport and small business uses have the potential to grow in sectors including business services, cultural uses and leisure. Indicative growth of 1,700 jobs from these sites is included in the policy.

- 2.73 Core Strategy Policy CSTP6 Strategic Employment Provision sets out more specific policies to address local business expansion and relocation, the

future use or redundant and under-used employment sites and economic development in the Regeneration Areas and Key Strategic Economic Hubs within Thurrock. The Key Strategic Economic Hubs will provide 445 hectares of Industrial, Commercial and Mixed-use land between 2009 and 2021. Across the borough, over 370 hectares of Industrial and Commercial land and 75 hectares of land for mixed-use development is planned.

- 2.74 It is also stated in Policy CSTP6 that the Council will positively encourage the relocation of existing firms wishing to expand and major non-conforming installations where this will improve their economic and environmental sustainability, improve the local environment for local residents and enhance the sustainable development potential of adjoining sites. The Council will subsequently promote the regeneration and renewal of these sites for housing and mixed-use development. The Council will direct office development to the key town centres and to Primary and Secondary Industrial and Commercial areas provided that it is accessible by sustainable modes of transport.
- 2.75 The Council sets out further policy relating to employment and retail in CSTP7 Network of Centres and CSTP8 Vitality and Viability of Existing Centres. The former sets out the Council's policy on expansion at the Lakeside Regional centre and at Grays Town Centre, in addition to the regeneration of other existing town centres and the development of appropriate retail space in other local and neighbourhood centres. The latter sets out the Council's approach achieving development of an appropriate scale in existing centres, to promote vitality and viability, while resisting out-of-centre development.

b) Site Allocations and Policies DPD (Preferred Option) (2007)

- 2.76 The Preferred Option Site Allocations and Policies DPD was consulted on in 2007/2008 at the same time as the Preferred Option Core Strategy. Further evidence and analysis of sites has been undertaken as a result of the consultation, the Lakeside Single Issue Review, the various Master Plans produced by the Thurrock Thames Gateway Development Corporation (TTGDC) and the *Employment Sites Review* produced by Tribal.
- 2.77 The Site Allocations and Policies DPD will contain the detailed allocations for Primary Industrial and Commercial sites, for Secondary Industrial and Commercial sites, for Mixed-use and for other sites such as oil refining and storage, leisure, health, education and housing. It is proposed that the Site Allocations and Policies DPD will not be submitted until after the outcome of the examination of the Core Strategy is determined.

c) Lakeside Area Action Plan

- 2.78 Thurrock Council has begun work on the Lakeside Area Action Plan (AAP) and this will include an assessment of sites within Lakeside Basin to identify future use for employment as well as other uses such as retail, leisure and housing. Additional information on employment land provision and job potential will be an outcome of this work. In preparing the AAP, Thurrock Council intends to work with the Thurrock Thames Gateway Development Corporation, in consultation with land owners and developers.

(vi) Thurrock Thames Gateway Development Corporation (TTGDC):

2.79 The Thurrock Thames Gateway Development Corporation (TTGDC) was set up by central Government to drive forward regeneration in the Thurrock. It began operating in January 2004. The TTGDC's remit is to facilitate growth, development and regeneration in the borough, and it has regeneration resources, borrowing powers, access to Treasury funds, planning control over major developments and land assembly powers to achieve this.

2.80 The TTGDC has prepared a range of Master Plans, Strategies and Frameworks that contribute to shaping Thurrock's Local Development Framework and the Core Strategy. The Master Plans identified below are non-statutory and some of the proposals they include do not correspond to Thurrock Council's Core Strategy, described in the previous section.

a) Purfleet Master Plan (2007)

2.81 The Thurrock Thames Gateway Development Corporation (TTGDC) published the Purfleet Master Plan in June 2007. The aim of the Master Plan is to deliver the regeneration of Purfleet by establishing opportunities to generate and support the development of new homes, jobs, school facilities and leisure activities.

2.82 The Master Plan notes that Purfleet has undergone significant change as it progresses from an economy based on extractive and large scale heavy industrial uses, to distribution and service uses. It also notes that former industrial estates have already been redeveloped for residential and new employment uses. The Master Plan seeks to ensure that employment needs are tailored to accommodate predicted demand whilst acknowledging the existing industries that support the local economy.

2.83 The Master Plan states that the following key factors are essential for economic success:

- To retain key employment uses and locate distribution land uses adjacent to transport links at the periphery of the area;
- To introduce new employment uses to strengthen the economic base of the area; and,
- Phase development activity to sustain a balanced demand.

2.84 The Master Plan notes that there is a lack of office space in Purfleet and considers that there is an opportunity to provide small scale office space to meet the needs of small and medium sized businesses. The Master Plan states that office space is required as part of mixed-use developments to encourage the formation of local businesses. The Master Plan also notes that there is an opportunity to locate a Business Village at a gateway site to the north of the centre, to provide serviced space for small businesses that would broaden and strengthen the local economy and help to balance the current heavy emphasis on distributive uses. The Master Plan seeks to allocate land at High House Class B1 employment mixed-use.

2.85 The Master Plan notes that the areas to the east of Purfleet and near the M25 are well positioned to make the most of transport connections and provide ideal conditions for the logistics and transport sectors. The Master Plan seeks

to concentrate these sectors to the east of Purfleet and to diversify uses in the centre between Channel Tunnel Rail Link down towards the River Thames.

- 2.86 The Master Plan notes that the existing Esso distribution depot currently presents development restrictions as a result of the Health and Safety Executive's PADHI Consultation Distance set around the fuel containers.

b) Purfleet Centre Development Framework (2009)

- 2.87 The Purfleet Centre development Framework was published by the TTGDC in September 2009. The document was prepared by Urban Initiatives to expand upon the Purfleet Master Plan (2007).

- 2.88 The aim is to create a compact local centre which will function as the civic heart for Purfleet and provide a vibrant mix of uses. The proposal is for a focal point around a square located between a new link road to the east of the existing railway station (the New Botany Way), and the station itself. A high street environment would be created along the New Botany Way, as well as a new east-west pedestrian route connecting the Dipping site, the Garrison Estate and the River Thames to a new park and existing residential neighbourhood to the east.

- 2.89 The New Botany Way link road would directly connect the A1306 with London Road along the east of the station and through the Beacon Hill Industrial Estate. It is intended that this road will open up access to a number of sites east of the railway. The Corporation is currently assembling land to facilitate the proposed route alignment for the New Botany Way.

- 2.90 It is stated that the industrial sites east of the railway line present inefficient and relatively low value land uses. This area is referenced in the Thurrock LDF as Site E1b Botany Quarry. The Development Framework considers that these sites provide an opportunity to deliver a significant amount of housing to support a new centre.

- 2.91 The Development Framework notes that the large sites along the riverside, such as Vopak and Cory's Wharf, provide the opportunity to create high quality river front development. The Framework states that the Vopak and Cory's Wharf sites are in the ownership of TTGDC.

- 2.92 The Development Framework considers that the low value industrial areas in close proximity to Purfleet Station should be relocated to the areas restricted by the HSE Zones around the Shell Site off London Road. It is stated that this approach will open up most of the Botany Quarry, Vopak and Cory's Wharf for residential and centre related development.

- 2.93 The Development Framework states that the quality of industrial and warehousing stock in Purfleet varies between and within individual estates. However, it is clear that when suitable opportunities arise, redevelopment is focussed on providing space for large-scale warehousing and distribution activities such as at the 'Ultrabox' site on the Purfleet bypass.

- 2.94 The Development Framework notes that Purfleet does not currently have any stand-alone office space. The supply of office space is limited to ancillary space, linked to other manufacturing, warehousing and distribution activities.

This space is located at the industrial and distribution parks at the edges of the built up area.

2.95 The Development Framework sets out four options for a new centre in Purfleet. These are:

- Option 1 – Land West of Purfleet Railway Station – located to the centre west of the railway at the existing station car park and the historical mound. The Botany Cottages on London Road will be retained, while new links with the river are established.
- Option 2 – At intersection of London Road with the New Botany Way. In this option the centre is located at the bottom end of the proposed “New Botany Way” at the intersection with London Road. East of the existing railway station, a new public space is proposed to form the heart of the centre.
- Option 3 – East of station at the disused railway bridge. This option proposes the centre to the east of the railway line half way between London Road and Tank Lane at the existing railway bridge.
- Option 4 – At the former Board Mills site south of London Road. This option proposes the centre on London Road at the former BPB site. A new square is proposed south of London Road.

2.96 The TTGDC’s preferred option is Option 3, which seeks the creation of a centre for Purfleet east of an improved railway station, with a new residential neighbourhood around it in Botany Quarry and a consolidated employment area to the east. It is stated that the framework has the potential to deliver nearly 10,000m² of retail floor space, principally around the proposed square; over 40,000m² of employment space in a consolidated employment area to the east; approximately 3,500 homes principally in Botany Quarry, and a health centre and primary school suitable for 630 pupils.

c) Lakeside and West Thurrock Master Plan (2008)

2.97 The Lakeside and West Thurrock Master Plan was published in November 2008. This document encompasses the West Thurrock Marshes (LDF Ref: E1f) and the Lakeside / Waterglades Industrial Estates (LDF Ref: E1g).

2.98 The Master Plan seeks to foster a retail and leisure destination of regional and national importance. To achieve this, the Master Plan makes provision for at least:

- 3,500 new dwellings;
- 6,500 new jobs;
- 70,000m² of new leisure/tourism floorspace;
- 115,000m² of new retail, café, bar and restaurant floorspace associated with new leisure facilities;
- 125,000m² of new industrial and logistical employment floorspace;
- 40,000m² of new educational, community, conference and exhibition floorspace.

2.99 This Master Plan seeks to establish clusters and zones of consolidated land uses. The Master Plan also seeks to create a pedestrian friendly environment with a high quality and vibrant public realm. The Master Plan focuses on the four key areas of change which have been identified in the Master Plan:

1. Essex Gateway - The creation of a high-end leisure led zone within the Green Belt.
 2. Lakeside Basin - A combination of a leisure and retail led scheme. The provision of a new Personal Rapid Transit (PRT) system to connect all parts of the Lakeside Basin.
 3. Wouldham Road/Askews Farm - The enhancement of the residential area of South Stifford.
 4. Nature Reserve/Industrial Zone - Promoting public access to the River Thames, enhancing ecological habitats and illuminating the industrial landscape.
- 2.100 The final publication of the Single Issue Review (January 2010) and a revised RSS Policy ETG2 gives rise to the requirement for a more comprehensive Area Action Plan (AAP) for the Lakeside Basin, and potential alterations to the framework set out in the 2008 Master Plan for Lakeside and West Thurrock.

d) Grays Town Centre Master Plan (2009)

- 2.101 The Grays Town Centre Master Plan was published by the TTGDC in March 2009. Regeneration of Gray's Town Centre includes proposals for mixed-use development, including high quality homes and offices, cafes, bars and restaurants, a new generation Community Hospital and a Learning Campus, for Further and Higher Education. The Master Plan also included proposals for a Marina at Grays.
- 2.102 The Master Plan proposes to promote Grays as a centre of professional and administrative jobs, focussed around a Waterfront Business Park. Housing would be provided in mixed-use developments, including redevelopment of the Titan Works site with 1000 new homes. Connections to the town would be improved with a landmark transport interchange at Grays Railway Station.
- 2.103 The Master Plan proposals are divided into interlinked urban 'Quarters' within Grays. Collectively they have the potential to provide¹:
- Approximately 2795 new homes (1100 at Titan Works Quarter, 400 at West Links Quarter, 100 at East Grays Quarter, 355 at South Grays Quarter, 175 at Existing Town Centre Quarter, 665 at the proposed Riverside Development).
 - Approximately: 3100 new jobs, including 200 at the New Generation Community Hospital and 300 at the Thurrock Learning Campus.
- 2.104 The total floor areas of new business space are to be confirmed, but individual sectors include 24,500m² of leisure/recreation at the proposed marina and refurbished State Cinema, 70,000m² of mixed use at South Grays Quarter and 75, 000m² of mixed use at the Riverside Development.

e) North Grays Draft Master Plan – Consultation

- 2.105 Preparation of the North Grays Master Plan is being undertaken by Urban Practitioners, in consultation with local community stakeholders. The Draft

¹ The figures provided by TTGDC are approximations and, therefore, indicative only prior to detailed planning.

Master Plan is being produced to address the potential growth and regeneration of an area of primarily open land south of the A13 and west of the A1089 to the north and east of the built up area of Grays.

- 2.106 The Master Plan aims to enhance and transform the leisure, residential, industrial and commercial areas north of Grays town centre and to identify natural assets in the area to be protected and enhanced. Its key concepts are to protect and enhance the Greenbelt around Grays and restore developed land to open space, where possible. There is an aim to improve leisure and educational facilities in the area, as well as to improve pedestrian links, cycle routes and public transport.

f) South East Thurrock Master Plan – Consultation

- 2.107 Urban Initiatives were appointed to prepare a Master Plan for the South East Thurrock Area in 2007. This area includes Tilbury, Chadwell St Mary and East Tilbury. Two public consultations were carried out: in March 2008 on the emerging Issues and Options for the area, and in August 2008 on the Preferred Option developed by the consultants. Subsequently proposals for Tilbury Marshes were re-considered, and further consultation on this element occurred in March 2009.
- 2.108 The proposals for Tilbury Marshes include a northward expansion of Tilbury Port's activities, including storage, warehousing and lorry parking. It is stated that these proposals would safeguard existing jobs, create new jobs, and maintain the port as an important strategic economic hub. In addition to the northward extension of the port, a new landscaped park would also be created in the marshes.
- 2.109 The location of existing port activities to the north, allows for development of high-quality housing and related facilities extending south from Tilbury town to the riverside. A Tilbury Riverside development would connect the town centre to the riverside, with approximately 800-1000 new homes, and links to leisure and heritage assets such as Tilbury Fort. Tilbury Town would be improved, with approximately 200 new homes developed on brownfield and redevelopment sites in the town.
- 2.110 In addition to development at Tilbury, the Master Plan proposes the development of 300 homes on the site south of East Tilbury railway station and a village of new homes at the Bata factory site.

g) East Thurrock Master Plan

- 2.111 The East Thurrock Master Plan was prepared by the TTGDC, and published in April 2009, to guide growth in the area in the period up to 2021 and to provide a framework for the provision of new homes, employment and community facilities. East Thurrock comprises the co-joined settlements of Corringham and Stanford-le-Hope and the London Gateway Site at Shellhaven. Development of the latter will generate jobs and demand for local housing and suitable shopping and leisure facilities.
- 2.112 The Master Plan proposals include revitalising of the centre of Stanford-le-Hope with a mid-sized supermarket, new shops and houses. It also proposes relocating the existing industrial uses at the Baryta Close industrial estate to

the Gas Works site on Butts Road, to the east. The Baryta Close site would then be redeveloped with housing.

2.113 Approximately 455 homes are proposed in the East Thurrock Master Plan. The locations and approximate numbers of homes are:

- Along the Butts Avenue brownfield Gas Works site - 57 homes
- In the Manorway site, south of the Manorway and east of the railway line - 180 homes
- At the Baryta Close site - 120 homes
- Within Stanford-le-Hope centre - 98 homes

2.114 In addition to the London Gateway port development, which will employ approximately 11,500 people, according to the Development Corporation Spatial Plan, three key sites for local jobs are identified. The locations and anticipated number of new jobs are:

- Gas Works Green Belt site (up to 600 new jobs)
- Stanhope Industrial Estate (refurbishment only)
- Essex and Suffolk Water site (refurbishment only)

h) Aveley/South Ockenden Master Plan

2.115 The Aveley and South Ockendon Master Plan (November 2007) was prepared by Urban Practitioners and published after an 18-month process which included a baseline analysis, three rounds of public consultation on Issues, Options and a Preferred Option, and stakeholder interviews. It aims to guide the creation of homes and jobs, new parkland, significantly improved social infrastructure and shops, and enhanced transport facilities.

2.116 Under the Master Plan, the southern part of existing employment area on Arisdale Avenue (Aveley Industrial Estate), which incorporates the former Ford Factory, has been re-allocated primarily for residential and open space uses. The Master Plan notes that large parts of the site, including the Ford factory, have been acquired by a major UK house builder, while industrial land to the east of Arisdale Avenue and Arcany Road needs to be assembled.

2.117 A total of approximately 1,400 homes are proposed for Aveley and South Ockendon in the Master Plan. The locations and numbers of homes set out in the Master Plan are:

- Along Arisdale Avenue (Aveley Industrial Estate site) - 750 homes potentially including 100 live/work units.
- Green Belt site south of the Aveley Bypass - 360 homes
- At the Marley Works site - 120 homes
- Within South Ockendon centre - 150 homes
- Aveley settlement infill - 20 homes

2.118 Employment uses displaced from Aveley Industrial Estate, South Ockendon, will be re-provided in two new and replacement employment sites west of Aveley on the A13. These are the Ponds Farm Site (south of the A13), and the site between the A13 and Sandy Lane. There will be a presumption against warehouse related uses.

- 2.119 The Master Plan provides for the regeneration of South Ockendon centre through the development of new mixed use, shops, homes and community service sites. The Masterplan also recommends development of three Green Belt sites, one for residential use and two for employment uses. These are sites identified in the landscape appraisal as of low sensitivity sites.

Section 3: Thurrock's Economy

- 3.1 This section provides an economic profile of Thurrock's economy. The East of England Employment Land Review Guidance Manual (2008) states that it is necessary for employment land reviews to include a profile of the study area's economy. The main purpose of this analysis is to help inform the economic goals and objectives of the local authority's employment land policy. The profile should include analysis of: industrial and employment structure change; labour market; and workplace economy.
- 3.2 The assessment of Thurrock's economy in the preceding paragraphs is based on the available economic information and three existing evidence-based documents: Thurrock Council Employment Study 2005, prepared by Bone Wells Associates; Thurrock Employment Land Review 2007, prepared by URS; and Accommodating Growth: Thurrock B Class Land Review 2008, prepared by Atkins on behalf of the TTGDC.
- 3.3 Each of the three documents uses similar secondary data sources such as the Office of National Statistics and the Annual Business Inquiry. The data sets are different, however, so it is not possible to make direct comparison between the documents. Each document provides a valuable resource that sets out the economic sector trends that have been prevalent in Thurrock since 1991. Collectively this information, together with the latest economic information, provides evidence to indicate which economic sectors in Thurrock are in decline and which are growing.

(i) Thurrock's Industrial Structure and Employment Change

- 3.4 The Thurrock Council Employment Study 2005, prepared by Bone Wells Associates (The Bone Wells Study) provides an assessment of employment structure and trends between the 1991 and 2001. It covers the first part, therefore, of Thurrock's development over the last twenty years. It was found in this study that although Thurrock had attracted many logistics and transport firms during this time period that these sectors did not dominate employment growth trends. In fact, the main change was the rapid growth in services.
- 3.5 Appendix 1: Table A1(a) sets out the changes in employment over 1991-2001 by main sector identified by the Bone Wells Study. It demonstrates that whilst overall employment increased by 21% over this period, the service sector achieved a 42% growth. The manufacturing and extractive and energy sectors experienced a decline during this period. Conversely, despite the increase in service employment there was also notable decline in financial services. Note, however, that this data only covers the period to 2001.
- 3.6 Although the growth of service employment in Thurrock reflects a trend that has occurred nationally, the rapid growth of service employment in Thurrock during the 1990s can be partly attributed to the expansion of Lakeside as a regional retail location. Wholesaling, hotels and restaurants, education and health enjoyed large increases of around 40-50%. The retail sector had the largest actual increase in employment numbers. Overall there has been rapid growth in construction employment, which can be attributed to the growth in housing in the Borough during this time.

- 3.7 The Bone Wells Study also considered Thurrock's economic position in relation to the other main 'employment' towns in the South Essex Thames Gateway i.e. Basildon and Southend-on-Sea and found that each town had a specific economic function. The study found that in 2001, 22% of employment in Thurrock was in logistics and distribution compared to 5.8% in Southend-on-Sea and 8.3% at Basildon. In respect to manufacturing, this sector accounted for 8.3% of employment in Thurrock and 6.8% in Southend-on-Sea whilst at Basildon it accounted for 20%. The service sector accounted for 46% of employment in Basildon, 55% in Thurrock and 61% in Southend-on-Sea.
- 3.8 The Thurrock Employment Land Review 2007 (the URS Study) also made an assessment of the changes to the economy, but considered a 1993 to 2003 time-period. It was found in this study that the level of employment had increased by 30% during this time. Appendix 1: Table A1(b) sets out the changes in Thurrock local employment number in each sector between 1993 and 2003.
- 3.9 The URS study found that largest absolute increase in numbers was in wholesale and retail trade sector, which increased from 9,923 jobs in 1993 to 17,759 jobs in 2003. The construction sector experienced the largest percentage increase in local employment growing by 177% between 1993 and 2003. Other notable increases in employment were made in the hotel and restaurant sector and in education.
- 3.10 Despite the increases in wholesale and retail trade, the Borough experienced declines in the Transport and Communications sector. There were also significant declines in the manufacturing, electricity and energy, and extractive sectors.
- 3.11 Whilst the Bone Wells study and the URS study use marginally different time periods and different industry classifications in which to assess Thurrock's economy, it is evident that the significant increases in employment between 1991 and 2003 were in the service sector and specifically retail, hotels and restaurant, business services and education and health. If this trend were to continue then the spatial employment pattern of the Borough would change with a focus upon retail centres and education and health institutions for employment growth.
- 3.12 With regard to Class B employment land, notable increases in the construction and wholesale sectors were identified, which will drive demand for this type of land. However, there was a continuing decline in the manufacturing sector, which will provide opportunity to release Class B land for other uses. It is not possible to make an assessment of employment proportions on Class B land from the URS study, however, based on the Bone Wells Study, employment on Class B land could accommodate circa 45% of total employment.
- 3.13 Appendix 1: Table A1(c) continues the assessment of the employment change in Thurrock using the latest Annual Business Inquiry data and assesses the time period 2001 to 2007. The Annual Business Inquiry provides indicative data only as there are issues with the way in which the data is collected and recorded which do not necessarily represent correct geographical interpretations. The total number of jobs in 2001 is significantly lower than that of the Bone Wells Study and the 2003 figure in the URS study, illustrating difficulties in making direct comparisons between the studies.

Comparisons can, however, be made in general trend data. The latest data appears to suggest that the growth in employment has slowed down in Thurrock since 2001, when compared with the preceding period from 1991.

- 3.14 The same trends that were highlighted on both the Bone Wells and URS studies are evident from this latest data i.e. a decline in manufacturing and growth in services. The main difference however, is the decline in the construction industry since 2001, which can be attributed to a general decline in house building in latter part of this period. There was also a significant increase in banking, finance and insurance, which until this period had been a sector of marginal growth.
- 3.15 It is therefore evident that since 1991 the employment trends are for a general decline in manufacturing across the Borough with an increase in wholesale and retailing and other services such as health and education. It is likely that the demand for Class B land will be increasingly from warehousing as demand from manufacturing recedes. This may result in some existing employment land becoming available for other uses, as considered elsewhere in this Employment Land Review.

(ii) Thurrock's Business Structure

- 3.16 All businesses that have a turnover that exceeds £68,000 per annum must register for VAT with Her Majesty's Revenue and Customs (HMRC). An assessment of VAT registered businesses in Thurrock provides an indication of the changes in wealth creation and type of business that are driving forward the Borough's economy. In particular it gives an indication of entrepreneurship over time, as well as business failure.
- 3.17 Appendix 1: Table A1(d) uses information provided from the Office of National Statistics and sourced from the HMRC. An assessment is made in terms of the quantity of VAT registered businesses by industry type. The number of VAT businesses in Thurrock increased by 23.1% between 2001 and 2007.
- 3.18 Between 2001 and 2007 the only industry that had a decline in number of VAT registered businesses was financial intermediation. This contraction has occurred despite an increase in the number of people employed in this sector during the period. This suggests that whilst the industry grew, it became more rationalised in terms of operating businesses.
- 3.19 The largest growth in business numbers occurred in construction and real estate and in renting and related business activities, both of which increased by over 200 businesses. Wholesale, retail and repairs was the third largest growth sector with 95 new businesses. There was also marginal growth in the number of manufacturing businesses in the Borough, contrary to the numbers of jobs lost in this industry during this period.
- 3.20 Again there are anomalies illustrated in the ONS/ABI data, in that the numbers of people employed in construction declined between 2001 and 2007 whilst the number of businesses increased. The construction industry is sensitive to changes in the property market, but is projected to grow in Thurrock given the level of housing and employment growth proposed for the Borough to 2021.

(iii) Thurrock's Business Size Bands

- 3.21 The TTGDC commissioned Atkins to undertake an assessment of Class B land in Thurrock in 2008. As part of this assessment Atkins investigated the changes to business size as a composition of the total number of businesses between 1993 and 2003 using information from the Annual Business Inquiry. This information is displayed in Appendix 1: Table A1(e) and has been updated to include the latest available Annual Business Inquiry data.
- 3.22 There was a general increase in the total number of businesses in Thurrock between 1993 and 2006. The number of small businesses that employ between 1 and 10 people more than doubled during this period. Small businesses became more important to the local economy as they increased as a proportion of the total number of businesses from 71.5% to 81.7% during the period.
- 3.23 Whilst all employment sizes increased in number, they did so to varying degrees. Notably, medium sized businesses that employ between 11 and 49 people significantly decreased in terms of the proportion of the overall number of businesses.
- 3.24 Appendix 1: Table A1(f) provides the industrial breakdown for Thurrock by employee size band from the Annual Business Inquiry 2006 data set.
- 3.25 Business services of a size of 1 to 10 employees represents 21.3% of all businesses in Thurrock's economy. Retail businesses of a size of 1 to 10 employees (14.5%) and Construction businesses of a size of 1 to 10 employees (13.6%) are the only other sectors that comprise more than 10% of all businesses in the Thurrock economy.
- 3.26 It is apparent from Appendix 1: Table A1(g) that the construction, wholesale and business sectors tend to be small businesses that employ up to 10 employees. The retail, hotel and restaurants and financial services industries include a significant proportion of businesses that employ between 11 and 49 people.
- 3.27 The public sector dominated businesses of public administration, education and health and social care generally constitute larger businesses of 11 employees or above. Public administration and education have the largest proportion of businesses in the Borough and generally employ more than 50 people.

(iv) Gross Value Added

- 3.28 Gross Value Added (GVA) provides a measure that distinguishes between the value of businesses' output and the value of their inputs for a given area and provides a good indication of an area's economic performance.
- 3.29 Appendix 1: Table A1(h) demonstrates that the level of GVA across England significantly increased between 1996 and 2006. The GVA for the East of England and its component areas also increased. The degree of variation in the increase of GVA across areas within the East of England suggests differences in economic performance.

- 3.30 Thurrock's proportion of the regional GVA actually decreased from 2.5% to 2.3% between 1996 and 2006. By comparison the Essex County Council area increased its proportion from 21.3% to 21.6%. Southend-on-Sea's proportion of the regionally GVA peaked in 2001 at 2.6% but reduced to 2.4% in 2006, which is less than their 1996 GVA proportion. Despite the increases in economic performance across these areas, it is apparent that the Essex County Council area performed more strongly than the South Essex Thames Gateway areas of Thurrock and Southend-on-Sea.
- 3.31 Appendix 1: Table A1(i) provides an assessment of GVA per head of population, which provides a detailed measure of the average individual economic performance. In 1997, Thurrock had a greater GVA per head than the regional average, as well as the Essex County Council area and Southend-on-Sea. In the years to 2006, the GVA per head of Thurrock increased but at a significantly slower rate than the regional average. It is also notable that Thurrock's GVA per head is now lower than the Essex County Council area and Southend-on-Sea, which suggests that since 1997, Thurrock has under-performed compared to the region and neighbouring areas.

(v) Labour Market

a) Economic Activity

- 3.32 Economic activity rates are a measure of the percentage of the population in any given area that is available for work and therefore a part of the potential labour force.
- 3.33 The ONS Annual Population Survey indicates that economic activity in Thurrock has declined from 80.7% to 79.9% between 2001 and 2009 (Appendix A1: Table A1(j)).
- 3.34 The East of England economic activity rate was 81.8% in March 2001 and remained at 81.8% in June 2009. The economic activity rate for Thurrock was 1.1% below the regional average in 2001, and had fallen to almost 2% below the regional average by 2009 (Appendix A1: Table A1(j)).
- 3.35 The economic activity of the male population of Thurrock fell over 3% between 2001 and 2009 from 86.9% to 83.8% (Appendix A1: Table A1(j)). This level of decline was more than twice the rate of the general economic activity decline of males across the region during the same period. By contrast the economic activity of the female population grew by 1.4% to 75.6% in 2009, the same degree to which the economic activity rate for females grew across the East of England. This emphasises the growing importance of females to the Thurrock economy.
- 3.36 The number of Thurrock residents in employment grew from 75,000 to 80,000 between 2001 and 2009. This level of growth was made up disproportionately of the increase in female employment.
- 3.37 The level of self employment in Thurrock provides a measure of enterprise. The proportion of people in Thurrock that are self employed is lower than the East of England average, but has risen faster than the region as a whole between 2001 and 2009 (Appendix A1: Table A1(k)).

- 3.38 The numbers of people in Thurrock receiving Job Seekers Allowance increased by almost 2,400 people between 2001 and 2010 (Appendix A1: Table A(l)). In 2001, Thurrock had an unemployment rate that was 0.5% higher than the East of England average, but the level of unemployment has increased across Thurrock at a higher rate than the regional average in the subsequent nine years. This suggests that Thurrock more vulnerable to recent changes in the national and global economies than the region as a whole.

b) The Earnings of Thurrock Residents

- 3.39 Gross average weekly earnings of Thurrock residents rose by 20% between 2002 and 2008, but fell by over 1% between 2008 and 2009 to £517.40. The fall is likely owing to the effects of the recession in Thurrock. Appendix A1: Table A (n) indicates that the gross earnings of residents in Thurrock in 2009 was above the East of England average (£509) and the national average (£491).
- 3.40 The average gross weekly earnings for both the male and female residents of Thurrock are greater than the regional and national averages. There remains a significant gender gap in earnings between males and females.

c) Deprivation in Thurrock

- 3.41 Between 2004 and 2007, the level of deprivation in Thurrock reduced. This is reflected in the average rank measure on the Indices of Deprivation (2007), where Thurrock improved its position from 122 in 2004 to 131 in 2007, out of a total of 354 local authority areas.
- 3.42 At the local level, over half (58%) of super output areas in Thurrock are more deprived than the national median average. There are five super output areas (out of 95) in Thurrock that fall within the 10% most deprived in England, and 12 super output areas falling within the 20% most deprived. These areas are concentrated in Tilbury and Belhus. The most deprived super output area in Thurrock is Grays Riverside. The least deprived super output areas are in South Chafford.
- 3.43 The findings of the indices of deprivation 2007 show that despite Thurrock seeing improvement in many areas such as health and skills, there remain significant inequalities across the Borough.
- 3.44 Indices of Deprivation are not yet available for 2008 and 2009, during which time the UK experienced a serious recession. When available, the indices will be able to show whether deprivation increased during that period and to what degree.

(vi) **Summary and Conclusions**

- Between 1991 and 2007 there has been a general trend towards growth in the service sector.
- Between 1991 and 2007 there has been a general decline in the manufacturing, extractive and energy sectors.
- The level of employment in Thurrock has grown by over 20% since 1993, however the level of growth has slowed since 2001.
- The number of businesses in Thurrock grew by over 25% between 2001 and 2007.
- The main growth sectors in Thurrock since 1993 are: Retail; Hotels; Restaurants; Education; Health; and Warehousing.
- There has been significant growth in construction but this faltered over recent years as the global and national economic conditions have changed.
- There was slow growth in banking, insurance and finance since 1993, however there has been a marked upturn in this sector in recent years.
- Businesses employing between 1 and 10 people make up 80% of all businesses in Thurrock.
- Public sector dominated industries such as health and education tend to employ more than 50 people.
- Thurrock's Level of GVA has increased between 1997 and 2006 but at a slower rate than the rest of Essex and the east of England.
- Economic activity in Thurrock has declined from 80.7% to 79.9% between 2001 and 2009.
- Economic activity of the female population grew by 1.4% to 75.6% in 2009.
- The number of Job Seekers in Thurrock increased by 2,400 people between 2001 and 2009.
- The average gross weekly pay for residents in Thurrock is greater than the East of England average and the national average.
- There are five super output areas (out of 95) in Thurrock that fall within the 10% most deprived in England.
- It is not yet possible to fully analyse the effect of the 2008-2009 recession on Thurrock's economy, but several indicators show that improvements between 2001 and 2008 have begun to reverse between 2008 and 2009.

SECTION 4: LAND AND PROPERTY MARKETS IN THURROCK

- 4.1 This section gives a market analysis of the current stock of employment land and premises in Thurrock Borough. Consideration is given to the commercial property market and the industrial and distribution property market. The East of England Employment Land Review Guidance Manual (2008) states that employment land reviews should include a profile of commercial land and property markets in the study area.
- 4.2 The first part of this section provides an assessment of the total non-domestic floorspace in Thurrock and makes a comparison with the other major employment centres in the South Essex Thames Gateway, i.e. Basildon and Southend-on-Sea. An assessment of the Valuation Office's rateable value of floorspace types is made using the latest available information.
- 4.3 The second part of this section considers the land property markets in Thurrock. This information has been derived from three key sources. These sources include: the CBI/GVA Grimley Corporate Real Estate Survey 2009, which provides a national perspective; URS's Thurrock Employment Land Review 2007; and the Kemsley Property Report 2008, which is specific to Thurrock and the wider Thames Gateway sub-region. In addition, Thurrock Council has undertaken its own research using information held on the 'egpropertylink' website² in August 2009.
- 4.4 It should be noted that none of these individual sources offers a definitive assessment of the stock of employment and premises in Thurrock; each offers a snapshot at a particular point in time. Considered together, however, the available sources provide a useful overview of the trends in the property market in the borough over time.

(i) The Stock of Employment Floorspace in Thurrock

- 4.5 The Valuation Office publishes property market assessments at regular intervals through the year. To inform these property reports, The Valuation Office collects data on each property that is subject to business rates. This data provides a valuable resource through which to assess the supply of non-domestic floorspace in Thurrock compared against Basildon and Southend-on-Sea. The Valuation Office uses a wide range of property information and rental evidence, and studies the rental market in depth to ensure that valuations are accurate and consistent, reflecting the individual characteristics of each property. In order to value a property, the Valuation Office would look at the physical properties of the property and consider the economic conditions, along with the nature of the transaction.

a) Total Floorspace

- 4.6 From the Valuation Office figures, Thurrock has a total non-domestic built stock of over 2 million m², which is comparable to the total non-domestic

² www.egpropertylink.com is a national database of available commercial property, developed in association with Estates Gazette. It lists over 60,000 properties.

floorspace in Basildon and significantly more than Southend-on-Sea (Appendix 2: Table A2(a)).

- 4.7 Of the three South Essex local authorities, Southend-on-Sea has the most retail floorspace, which is marginally more than Thurrock and significantly more than Basildon. It is also notable that retail floorspace amounts to a third of Southend-on-Sea's total floorspace, whilst retail amounts to 21% of total floorspace in Thurrock.
- 4.8 Thurrock has the smallest amount of office floorspace compared to Basildon and Southend-on-Sea. Indeed, office floorspace accounts for just 4% of Thurrock's total floorspace. In contrast, office floorspace accounts for 20% of Southend-on-Sea's total floorspace and 11% of Basildon's total floorspace. It is clear that Thurrock has a shortage of office space. The Thames Gateway sub-region office market is dominated by Southend-on-Sea.
- 4.9 Basildon has the most factory floorspace of the three authorities with approximately 215,000m² more factory floorspace than Thurrock and over 0.5 million m² more than Southend-on-Sea. It is clear that whilst Thurrock contains a significant amount of floorspace, Basildon is the main location in the South Essex Thames Gateway for factory premises³.
- 4.10 Thurrock is the main storage and logistics centre in the South Essex Thames Gateway sub-region, as it contains approximately 230,000m² more floorspace in this sector than Basildon and 620,000m² more than Southend-on-Sea.
- 4.11 It is clear from the assessment of the floorspace in Thurrock that the main economic drivers in the Borough are the logistics and distribution and the retail sectors.
- 4.12 At a sub-regional level Thurrock, Basildon and Southend-on-Sea each have a significant retail sector but all other have a differing economic function. Thurrock is the main logistics and distribution centre, whilst Basildon is the main industrial centre and Southend-on-Sea provides an important office function.

(b) Rateable Value

- 4.13 The assessment of the rateable value provides an indicative assessment of the quality of the non-domestic floorspace. The rateable value is an assessment of the property for tax purposes. It comprises an estimate of the annual rent that would be paid for the property at a fixed date two years prior to the beginning of the valuation date and incorporating certain assumptions laid down in the legislation. A number of factors are taken into account, when a value is determined for a property, such as, size and location. Other factors include the market price for similar local properties.
- 4.14 It is consequently possible to compare differences in commercial sectors to provide an indication of the uses that generate the most economic wealth. It is also a useful measure in which to assess building stock against neighbouring areas.

³ Appendix 2, Table A2(b) 'Total Non-Domestic Floorspace in Thurrock' sets out this information in detail.

- 4.15 Appendix 2: Table A2(c) demonstrates that the value of non-domestic property in Thurrock is more than double that of Southend-on-Sea and approximately 15% more than Basildon. Appendix 2: Table A2(c) shows that the value of non-domestic floorspace per square metre in Thurrock is 18% greater than Basildon and 26% greater than Southend-on-Sea.
- 4.16 The rateable value of Thurrock's retail floorspace is more than double that of both Basildon and Southend-on-Sea. Thurrock has marginally less retail floorspace than Southend-on-Sea and 17% more than Basildon, and the much greater rateable value of its retail floorspace demonstrates the importance of retail in the local economy and its influence across a wider area. The value of the Thurrock's retail floorspace amounts to more than 50% of the total value of non-domestic floorspace in the borough.
- 4.17 By comparison, the value of office floorspace is just 3.9% of the total non-domestic floorspace in Thurrock, whereas in Basildon it accounts for 18.4% and 21% in Southend-on-Sea. Despite the low value of office space, per square metre the value of office space is greater in Thurrock compared to Southend-on-Sea. This demonstrates that the office market in Thurrock is under represented and there is potential to increase the level of stock.
- 4.18 The value of factory floorspace is greatest in Basildon, which underlines the importance of Basildon as a manufacturing centre in the region. Whilst Thurrock has a greater proportion of factory stock (14.5%) compared to Southend-on-Sea (12.1%), they are comparable in terms of proportion of the overall non-domestic floorspace. Per square metre, the value of factory floorspace is broadly comparable between Thurrock and Basildon.
- 4.19 The value of warehouse floorspace is highest in Thurrock and is worth approximately £12million more than Basildon and £40million more than Southend-on-Sea. Warehouse floorspace accounts for almost 30% of the total value of non-domestic floorspace in Thurrock and together with retail accounts for approximately 80% of the total value of non-domestic floorspace. Warehouse and retail floorspace are the main wealth generators in the Thurrock economy.

(ii) **Industrial and Commercial Property Market: A National Perspective**

- 4.20 The CBI/GVA Grimley Corporate Real Estate Survey provides an overview of the UK property market across a number of sectors. It is published twice a year, in the spring and in the autumn. The survey investigates the views of Senior Real estate management teams to determine recent changes to their business and how it translates to real estate needs. The results of the survey provide a qualitative assessment of the short term trends that are likely to affect the property market nationally and could affect Thurrock. The survey also gives an indication of how property portfolio decisions being made now will affect the market as the UK economy recovers from the current global economic downturn.
- 4.21 The Spring and Autumn 2009 editions of the Survey demonstrate how senior real estate management teams have responded to global and national economic challenges during the past year and what their future expectations are. It is clear from their evidence that whilst hard decisions need to be made

in the short term, businesses are preparing themselves for the long-term to establish a competitive advantage in the projected upturn.

- 4.22 The Autumn 2009 Survey suggests that business confidence for the following two years has improved since the Spring 2009 edition and output expectations for the following six months have also turned positive.
- 4.23 Although expectations for employment remain negative, they have improved since spring 2009. Retailers and engineers now expect to make a modest increase in staff numbers over the coming six months. Whilst other sectors continue to reduce staff, financial services firms anticipate a significantly larger reduction than they did in the Spring 2009. The Survey's view is that this indicates that business is expecting to improve performance from its existing staff, whilst for certain sectors such as financial services a significant improvement in productivity is expected.
- 4.24 The Autumn 2009 Survey states that a further reduction of property holdings is expected in the next six months, continuing the trend of the previous 12 months. The main drivers in business property decisions remain cost reduction and cash flow, in an economic environment where credit conditions continue to be very tight. Lease expiries will continue to be used as a means of reducing property holdings and firms are increasingly looking towards exercising break clauses to speed the process up.
- 4.25 Actual shedding of space in the last six months was less than had been anticipated in the Spring 2009 Survey. The general trend in reducing property holdings is likely to continue over the coming six months, with sectors such as extraction & utilities and financial services expecting a reduction in space requirements. Conversely, there was a net increase of space in the construction, leisure and retail sectors over the last six months and demand continues to exist for more space in these sectors over the coming six months.
- 4.26 In order to reduce costs and improve cash-flow many businesses continue to seek to reduce their lease holdings. While continuing to allow leases to expire in order to reduce surplus property, there has also been a shift towards firms exercising break clauses in leases, despite the penalty costs and increased liabilities involved. Shedding property remains inflexible as a method of improving cash-flow in the short-term, however, owing to long lead-in times and uncertainty of outcome.
- 4.27 The Autumn 2009 Survey reports that the breadth of businesses that are looking to utilise break and expiry opportunities has increased, and that the outcome is likely to be an adverse effect on rental values as space reverts back to landlords.
- 4.28 The Autumn 2009 Survey also reports on attitudes towards re-locating abroad and sustainable buildings. It finds that a greater proportion of firms would consider relocating away from the UK than one year ago, and that in the current environment, sustainable buildings are primarily seen as a means of reducing costs and as such occupiers would only pay marginally more rent for one.

(iii) Industrial and Commercial Property Market in Thurrock

4.29 The Kemsley Report (2007/2008) focuses on the Thames Gateway and Essex property market at the end of 2007. The information was drawn from properties listed on the 'Gateway to London' and 'egpropertylink.com' property databases, from information held by Kemsley LLP and key 'investment performance data' supplied by Investment Property Databank (IPD). This report provides the most up to date available in respect to the Thurrock and wider Thames Gateway property markets.

4.30 The URS Report (2007) draws its evidence on the Thurrock property market from the research undertaken by Knight Frank.

a) The Wider Thames Gateway Industrial Market

4.31 In summer 2007, the total amount of space available in the nine Thames Gateway boroughs amounted to 474,848m². Bexley and Barking and Dagenham account for approximately 60% of the industrial/warehouse space available in the Thames Gateway. Tower Hamlets dominates the Thames Gateway office market, accounting for almost 75% of total availability. Hackney has a thriving office market and is bigger than all the Essex district markets, with the exception of Chelmsford.

b) Thurrock's Industrial and Commercial Market

4.32 The URS Report (2007) states that the industrial and commercial property market in Thurrock is considerably larger than the office market and this is reflected in the analysis of total floorspace. Industrial and (particularly) warehouse accommodation is of sub-regional importance in terms of bulk and value.

4.33 Figure 7.7 of the URS Report illustrates industrial availability by sub-market since 1998. It is noted that the greatest impact upon the supply of industrial accommodation will be development of the Shell Haven ('London Gateway') site in Stanford-le-Hope which will provide an additional 200 hectares of available land.

4.34 Figure 7.16 of the URS Report illustrates the amount of vacant designated employment land that has been developed in Thurrock since 1998. It is stated that since then, a total of 87.23 hectares of land has been developed. The majority of the development activity occurred in Purfleet, with 35.32 hectares of land developed since the beginning of 2002. The largest single site to be developed was the Greenlands Quarry totalling 23.5 hectares, which was developed in 2001 and accounted for 27% of all land developed since 1998.

4.35 The Kemsley Report cited that in autumn 2007, Thurrock had 118,507m² of available industrial/warehouse floorspace, making it the largest industrial/warehouse location in Essex. It notes that large properties dominate the Thurrock industrial/warehouse market. There are more units in Thurrock greater than 900m² in area than in the rest of the Essex districts combined.

4.36 A desktop assessment undertaken by Thurrock Borough Council in 2009, using internet sources, identified 96,476m² of available industrial/warehouse floorspace. Warehouse and storage accommodation accounted for 66% of the total available floorspace. A composite of Class B2 (general industry) and

Class B8 (storage and distribution) floorspace accounted for 32% of the total available floorspace.

- 4.37 Figure 7.17 of the URS Report demonstrated the dominance of the warehousing sector on take-up within the Borough of Thurrock. Over the last decade warehousing space accounted for 75% of total take-up. Since 1995 the annual take-up levels averaged 53,261m² for warehouse accommodation and 16,612m² for light industrial space.
- 4.38 Figure 7.18 of the URS Report set out the annual take-up levels for each of the sub-markets within Thurrock. It was demonstrated that West Thurrock has experienced the most take-up of any of the sub-markets, representing 67% of the 768,600m² of the total take-up since 1995.
- 4.39 The URS Report concluded that industrial and commercial land and property market in Thurrock has demonstrated a capacity to attract larger occupiers, however the number of larger premises, currently available in the market is limited. The URS Report considers that subject to the implementation of the Shell Haven scheme industrial market within Thurrock will be increasingly focused on smaller industrial units leading to a decline in average annual take-up levels.

c) Thurrock's Office Market

- 4.40 Tables 7.1 to 7.4 in the URS Report detailed the office accommodation available within the Thurrock area in 2007. The total availability within Thurrock was 5,715m², with 42% of accommodation graded second-hand. This level of available floorspace was slanted by a newly completed 2,220m² development at Lakeside Court on London Road in West Thurrock. Gateway House offered 1,012m² refurbished space, however the remainder of available office accommodation within the Thurrock Borough is considerably smaller, generally ranging from just 56m² to 563m² of second hand accommodation.
- 4.41 The Kemsley Report cited that in the Thurrock office market, there were just five properties amounting to 867m² of available space in autumn 2007. Most other office space is contained within industrial/warehouse units in the large distribution parks, such as J31 Business Centre and Gateway 25 that dominated Thurrock and its surrounding area. New build offices of 85m² at Ascension Business Park, Chafford Hundred had recently been placed under offer. A self-contained building on the Europa Estate, Magnet Road offers 532m² of space.
- 4.42 Using available internet sources in 2009, including the egpropertylink website, Thurrock Borough Council was able to identify just 6,500m² of available space. This included 760m² of modern purpose built accommodation at Fort Road, Tilbury and 575m² of second hand accommodation at the Queensgate Centre in Grays. The remaining available office accommodation is generally small space that is less than 575m² in size. It is recognised that not all the available office has been identified by this Review but it is useful in that provides a good indication of what type of floorspace is available. Other available sites, such as those in Grays and Stanford-le-Hope identified in the URS Report (2007), are designated in the LDF as housing, and so may not be available for employment purposes in the long term.

- 4.43 The conclusions of the Kemsley Report and the URS Report indicate trends within the borough. Given the size range and quality of the office accommodation available, it is clear that the supply-side of the office market in Thurrock is focused on smaller, second-hand units. There have not been any office units on the market greater in size than 1,115m² in the last three years. The URS Report noted that the historic trend in Thurrock is for low levels of demand and turnover for office accommodation and that this can mostly be explained by the small amount of office stock currently in the Borough. The URS Report suggests that it is possible that there may have been an element of unmet demand in recent years although it notes that this is unquantifiable because it impossible to accurately say which office occupiers might have relocated into Thurrock had the office premises been available.
- 4.44 The URS Report made an assessment of annual floorspace take-up in Thurrock between 1995 and 2005. Figure 7.1 of URS Report noted that take-up activity was concentrated to 1999 when 7,045m² of office floorspace was taken up. This represented 64% of all take-ups in the 10-year period that was assessed. Over this 10-year period the total take-up amounted to 10,893m². The URS Report concluded that take-up activity was generally focused on small office units with an average transaction size of 305m². This suggests a highly localised office market in Thurrock.

(iv) Summary of Land and Property Markets in Thurrock

- Thurrock has a total non-domestic built stock of over 2million m², which is comparable with Basildon and greater than Southend-on-Sea.
- The value of non-domestic stock is higher in Thurrock than the rest of the South Essex Thames gateway sub-region.
- Thurrock has the lowest level of office floorspace in the South Essex Thames gateway sub-region.
- The value of office stock in Thurrock accounts for just 3.9% of all non-domestic stock in the Borough.
- Thurrock has the highest amount of warehouse and distribution floorspace in the South Essex Thames gateway sub-region.
- The value of warehouse floorspace is greatest in Thurrock compared to the rest of the South Essex Thames Gateway sub-region.
- The value of retail floorspace in Thurrock is more than double the rest of the South Essex Thames gateway sub-region.
- Retail and warehouse floorspace account for 80% of the total value of non-domestic in Thurrock.
- At a national level there is expected to be declines in extraction and utilities, manufacturing, construction and financial services.
- Nationally, retailing is the only sector that is expected to increase its property holdings over the next year.
- The existing property market lacks flexibility in terms of lease agreements and this is impeding the property market's ability to respond to the existing global and national economic challenges.
- Large properties dominate the Thurrock industrial/warehouse market. There are more units of more than 900m² in Thurrock than in the rest of the Essex districts combined.
- Warehouse and storage accommodation accounts for 66% of the total available floorspace in Thurrock.
- Most office space is contained within industrial/warehouse units in the large distribution parks.
- From the size, range and quality of the office accommodation available, it is clear that the supply-side of the office market in the Thurrock Borough is focused on smaller, second-hand units.

Section 5: Employment Land Audit

- 5.1 The East of England Employment Land Review Guidance Manual (2008) requires an inventory and audit of employment sites with the aim of determining whether existing sites should be transformed to other uses or require continued employment projection. A preliminary survey was conducted to establish the current status of existing employment sites and employment land to be audited by as part of this employment land review. The survey site list consists of employment sites identified in the Preferred Options Site Allocations DPD and other existing employment sites that were designated for other uses (including housing) in the LDF.
- 5.2 The criteria followed guidelines set out in ODPM guidance Planning Employment Land Reviews (2004) and East of England Employment Land Review Manual (2008). It also includes a number of other factors local to Thurrock. The criteria used comprise the following:
- Site Reference;
 - LDF Designation;
 - Site area;
 - Condition of the buildings;
 - Accessibility;
 - Business Types;
 - Rateable Value;
 - Level of existing floorspace;
 - Vacant floorspace
 - Building coverage;
 - Planning constraints; and
 - Planning permissions.
- 5.3 The sites contained in the survey have been separated into two categories because of their different planning status i.e. Existing Primary Industrial and Commercial Areas and Existing Secondary Industrial and Commercial Areas.
- 5.4 The following paragraphs provide an explanation of the methodology used to assess the existing industrial and commercial areas and also provides a summary of the key findings. It is supported by the appendices that follow at the end of the document. Appendix 5 sets out the quantitative summary analysis of the research data. Appendix 6 provides a detailed schedule of information on each of the existing industrial and commercial areas which remain as employment sites in the LDF. Policy recommendations are set out within the schedules based on this information. Appendix 7 provides a similar analysis for those existing employment sites that are proposed to be re-designated to other uses, notably housing, in the LDF. Appendix 8 sets out a brief analysis of the proposed employment sites carried forward into the LDF that are not within the boundary of, or immediately adjacent to, existing employment sites. Appendix 9 considers other sites that include employment uses but which are not currently designated in the LDF. Appendix 10 and Appendix 11 consider the vacant sites identified by the employment land audit, including their potential for further development and planning histories. Appendix 12 provides maps of each of the existing industrial and commercial areas and considers any relevant changes that are required to the sites. When proposed new employment sites are associated with the existing sites

the mapping analysis indicates whether they are an appropriate designation and whether their boundaries are accurately drawn.

(i) Industrial and Commercial Floorspace and Employment Capacity

- 5.5 The existing employment capacity of each site and potential employment capacity from vacant sites was calculated based on the methodology and assumptions set out in Tribal's *Employment Sites Review 2010*.
- 5.6 The estimated level of floorspace was calculated using GIS data to determine the gross floor area, whilst site surveys were undertaken to determine the number of storeys of each building. An assessment of the use class was made during the site surveys through observation of the businesses operating the sites.
- 5.7 Once estimated total floorspace had been calculated has been determined for each site then an appropriate employment density was applied. Employment densities i.e. floorspace per worker, are taken from various sources. This assessment of employment was based on the assumptions set out by Tribal in their *Employment Sites Review*.
- 5.8 The level of vacant floorspace was determined by assessing the vacant property list on the egpropertylink.co.uk website. The site survey was used to assess the egpropertylink.co.uk vacant property list was accurate and that no double counting had occurred. The site survey also picked-up any further units that had not been identified by the egpropertylink.co.uk vacant property list. The employment density calculation of vacant floorspace was undertaken to assess the potential employment capacity of existing sites.
- 5.9 The level of vacant land was determined by an on-site site survey. The employment capacity of the existing industrial and commercial sites was determined by applying the plot ratio assumptions for each sector that are set out in Tribal's *Employment Sites Review 2010*. The employment density assumptions discussed above were then applied to determine the potential capacity.
- 5.10 The building coverage of an employment site is a measure to determine the proportion of the land area taken up by existing buildings. This measure provides an indication of whether an existing site has the potential to intensify existing uses. The assessment was made by calculating the estimated existing floorspace against the total land area.

(ii) Rateable Value

- 5.11 The rateable value for each existing employment site was assessed to provide an indication of the quality and quantity of commercial and industrial stock in Thurrock. The information is taken from the Valuation Office. The rateable value comprises an estimate of the annual rent that would be paid for the property. The data is used to compare differences between employment areas to provide an indication of the successful areas that generate the most economic wealth. It is also a useful measure in which to assess the quality of building stock.

(iii) Planning Constraints

5.12 The assessment of the planning constraints for each industrial and commercial site was made using GIS information. The constraints include:

- Flood Zone 2 and 3
- Tree Preservation Order
- Overhead Power Lines
- SSSI
- Major Hazard Sites (COMAH)
- Landfill Site
- Underground Cables
- Local Wildlife Site
- Explosive anchorage
- Listed building
- Conservation Area

(iv) Employment Hub and other Employment Location Summaries

5.13 The following paragraphs summarise the existing employment sites included in the LDF. Location, overall quality, available land and premises and their position within an employment hierarchy are considered. The sites principally fall within 4 of the 5 key strategic employment hubs in Thurrock (none of the existing sites are located within the 'London Gateway'). Having been incorporated into the Core Strategy, the key strategic employment hubs will collectively form the locations for employment growth across the core and growth sectors and will provide the engines of economic development and regeneration in the borough. It is intended that new employment development will be directed to appropriate locations in the economic hubs on land identified as Primary and Secondary Industrial and Commercial Employment Land. Industrial and commercial areas outside the employment hubs are also considered in this section.

a) Purfleet

5.14 The Purfleet Employment Hub contains five Primary Industrial and Commercial sites and one Secondary Industrial and Commercial site and is one of Thurrock's main industrial and commercial hubs.

5.15 The Purfleet Industrial Park is a Primary Industrial and Commercial site. This site is generally used as a warehouse and distribution park although there is evidence of recycling and environmental industries at this site. The buildings are generally in good condition although a small number are in need of upgrading and renewal. A number of the sites have been subject to planning permissions for improvement works and extensions since 2001, suggesting evidence of general upgrading of the site. The site has a number of vacant units that if occupied could accommodate between 370 and 515 jobs. There is 0.81 hectares of vacant or underused land and an additional 1.56 hectares on two parcels of land that are proposed to be allocated as New Primary Industrial and Commercial sites.

5.16 Purfleet Industrial Park is a successful industrial and commercial location with potential for further intensification with employment uses. It is recommended that this site protected for employment uses.

- 5.17 Botany Quarry / Tank Lane is a Primary Industrial and Commercial site. This site is generally used by low-density industrial operations. Approximately 50% of the buildings are in poor condition. The quality of the buildings is of low value as emphasised by the low average rateable value. Given the number of poor quality buildings, the site requires an intervention or re-designation to improve its quality and maximise the site's potential.
- 5.18 Botany Quarry / Tank Lane is underused as a Primary Industrial and Commercial site with only the northern part of the site providing good quality accommodation. The site is located in a central position in Purfleet that has fragmented the surrounding residential uses by discouraging connectivity. The southern part of the site provides a strategic function in terms of developing sustainable communities. It is recommended that the southern part of the site be allocated for alternative uses.
- 5.19 Former BPB, London Road is a Primary Industrial and Commercial site that at present is vacant although there is an extant planning permission for its redevelopment. The site is located within a Major Hazard Zone (COMAH) which will constrain the site's redevelopment for alternative uses. It is recommended that this site continue to be protected for employment uses, with the site area being extended to include the whole of the block bounded by London Road and Mill Road.
- 5.20 The Dolphin Estate / Lafarge is a Primary Industrial and Commercial site. This site adjoins the M25, partly bounds the Purfleet By-Pass and is generally used for strategic warehouse operations, although there are some small-scale offices and industrial activities. The buildings are of high quality which is reflected by their high rateable value. There have also been several new developments. There are a number of national operators including Tesco, Harveys and James Latham on site. The vacant floorspace at the site could accommodate an additional 135 to 230 new jobs.
- 5.21 The Dolphin Estate / Lafarge is a successful industrial and commercial location with limited capacity for further intensification. It is recommended that this site be protected for employment uses.
- 5.22 London Road, Purfleet is a Primary Industrial and Commercial site. This site is more commonly referred to as the Purfleet Thames Terminal Site. This site is located in close proximity to the M25. The site is of strategic importance as it contains a significant port terminal that specialises in the transport of vehicles and containers. Part of the site is also used for the production of food. The conditions of the buildings are generally good with evidence of improvement works. There are 18.78 hectares, comprised of three sites, that are proposed to be allocated as New Primary Industrial and Commercial sites at this location.
- 5.23 London Road, Purfleet is a successful industrial and commercial location of strategic importance. It is recommended that this site be protected for employment uses.
- 5.24 The Milehams Industrial Estate is a Secondary Industrial and Commercial site. The site contains mainly industrial buildings that are in a poor condition. There are no vacant units, which suggests a high demand for this type of property in this location. Despite the quality of the site, the value of the units is marginally less than the average for Thurrock. Whilst the site is in need of

regeneration, its redevelopment will be constrained by the adjacent high speed Channel Tunnel Railway Line.

- 5.25 Milehams Industrial Estate is a successful industrial and commercial location of strategic importance. It is recommended that this site be protected for employment uses.

b) West Thurrock Marches / Lakeside Basin

- 5.26 West Thurrock / Lakeside Basin contains two large Primary Industrial and Commercial sites covering approximately 217 hectares and Thurrock's largest industrial and commercial hubs. Combined, the existing industrial and commercial sites have the capacity for between 8,265 and 10,565 jobs on existing floorspace.
- 5.27 West Thurrock Marshes contains a number of sub areas that support a variety of business types. There are a large number of open storage sites throughout the site. There are a large number of sites that are in poor condition and several areas of under-used land provide development opportunities. The site does, however, have several constraints including an SSSI and part of the site being within a Major Hazard Zone (COMAH). This site is identified as a key strategic employment site in the emerging draft to RSS Policy ETG2. There are 14.43 hectares of vacant or underused land at West Thurrock Marshes and 39.62 hectares of land proposed to be allocated as a New Primary Industrial and Commercial sites.
- 5.28 West Thurrock Marshes is a partially successful industrial and commercial location of strategic importance. The site contains several areas that are appropriate for intensification with employment uses. The nature of operations and character of the site prevent it from being developed for alternative uses. It is recommended that this site be protected for employment uses.
- 5.29 Lakeside / Waterglade is in generally good condition and benefits from good access to the M25. The site provides strategic warehouse and distribution activities. There has also been an encroachment of retail and *sui generis* uses into the area. A large vacant area at the heart of the area provides an opportunity to intensify uses and utilise the site's strategic position. The existing vacant floorspace within the area could accommodate between 440 and 930 new jobs. This site is identified as a key strategic employment site in the emerging draft to RSS Policy ETG2. The land to the north is identified as a regional centre. There are 1.52 hectares of vacant or underused land at this location.
- 5.30 Lakeside / Waterglade Marshes is a successful industrial and commercial location of strategic importance. The site contains several areas that are appropriate for intensification with employment uses that support the adjoining proposed regional centre. It is recommended that this site be protected for employment uses.
- 5.31 The future of the Lakeside / Waterglade Marshes area will be revisited and subject to review in the Area Action Plan arising from the Lakeside Single Issues Review.

c) Grays

- 5.32 The Grays employment hub contains three Secondary Industrial and Commercial sites. The existing industrial and commercial sites can have the capacity to accommodate between 690 and 880 jobs on existing floorspace.
- 5.33 Chafford Hundred North West Zone is an existing Secondary Industrial and Commercial sites. This site provides modern purpose built office accommodation and is fully occupied. The site is well located and close to existing public transport connections. Approximately a third of the site is occupied by residential uses.
- 5.34 It is recommended that this site be protected for employment uses. The site boundary should be amended to exclude the residential element.
- 5.35 434 – 436 London Road is one of the larger Secondary Industrial and Commercial sites in Thurrock. The buildings are in generally good condition with a number of new units recently constructed. The site provides warehouse and distribution accommodation but also contains a number of industrial uses that impact upon the amenity of the surrounding residential area. The site is close to full capacity. There are 0.32 hectares of vacant or underused land at this location.
- 5.36 It is recommended that this site be protected for employment uses.
- 5.37 Grays South – Manor Way provides mainly industrial accommodation. The buildings are generally good condition, however approximately 25% are in poor condition and in need of upgrading and modernising. The site is located within a Major Hazard Zone (COMAH), which will restrict any future developments.
- 5.38 It is recommended that this site be protected for employment uses. The site boundary should be amended to exclude the residential element.

d) Tilbury

- 5.39 The Tilbury employment hub contains two Primary Industrial and Commercial sites.
- 5.40 Thurrock Park, Little Thurrock provides good quality modern warehouse and distribution accommodation that is well connected to Tilbury Port and the strategic road network. The site has not been completely built out and has extant planning permission for its extension. The ground works are currently being undertaken for the extension to the site. This site also contains a proposed New Primary Industrial and Commercial area, which constitutes the land subject to the extant planning permission for extension to the site.
- 5.41 It is recommended that this site be protected for employment uses.
- 5.42 Tilbury South provides high value modern warehouse and distribution accommodation and space for car depot. The site is well related to the Tilbury Port and the strategic road network. A recently completed business park provides a range of workshop and business units. The site has a low vacancy rate.

- 5.43 It is recommended that this site be protected for employment uses.
- e) Other Employment Locations
- 5.44 There are four Secondary Industrial and Commercial sites, proposed for retention in the LDF, which are located outside the main employment hubs in Thurrock.
- 5.45 Aveley Industrial Estate is located to the north of South Ockendon. The site contains a large purpose warehouse that is in good condition. This unit is used by the retailer Next as a distribution centre. The industrial units to the south were formerly part of this industrial site, but are proposed for designation as housing in the LDF. They are considered, for completeness, in Appendix 7 of this document.
- 5.46 It is recommended that this site be protected for employment uses.
- 5.47 Bata / Thames Industrial Park is located in East Tilbury. The site contains the original Bata shoe factory buildings, which are listed. The site is in poor condition and underused. Its main uses are light industrial activities and storage. The site contains vacant land that has the potential for redevelopment. The site is in need of modernisation and partial redevelopment to maximise its potential. Part of this site is also proposed as a New Secondary Industrial and Commercial. There are 3.13 hectares of land proposed to be allocated as a New Primary Industrial and Commercial site at this location.
- 5.48 It is recommended that part of the site be protected for employment uses, with consideration also given to longer term re-use and limited development with mixed-uses and cultural industries.
- 5.49 Durox Works is located at Linford. This site is relatively enclosed. The site is occupied by Tarmac and is used as a manufacturing facility for aircrete and construction related materials. It performs an important activity that is necessary to support the construction industry.
- 5.50 It is recommended that this site be protected for employment uses.
- 5.51 Stanhope Industrial Park is located to the south-east of Stanford-le-Hope. The buildings at the site are in good condition, however, there are a number of vacant plots of land. This Site provides accommodation for industrial uses, but also includes a large open storage car depot / salvage yard. There have been a number of planning applications at this site that have sought to increase the quality of the industrial and commercial site and increase floorspace. The site is also well located to the proposed London Gateway port facility. There are 3.11 hectares of vacant or underused land and 4.16 hectares of land proposed to be allocated as a New Primary Industrial and Commercial site at this location.
- 5.52 It is recommended that this site be protected for employment uses.

(v) Estimated Industrial and Commercial Employment Floorspace

- 5.53 This Employment Land Review estimates that the existing floorspace (i.e. extant buildings) on Primary Industrial and Commercial Employment Land designated in the LDF amounts to circa 1.46 million m². This level of employment floorspace provides the capacity for approximately 16,165 to 20,730 jobs. This information is set out in more detail in Appendix 5 (Table A5(a)) and Appendix 6 of this document.
- 5.54 The study estimates that of the 1.46 million m² Primary Industrial and Commercial floorspace in Thurrock, approximately 113,000m² (or 7.7%) is currently vacant.
- 5.55 The estimated existing floorspace of Secondary Industrial and Commercial Employment Land designated in the LDF amounts to approximately 168,000m². This level of employment floorspace provides the capacity for between 3,342 to 3,982 jobs. This information is set out in more detail in Appendix 5 (Table A5(b)) and Appendix 6 of this document.
- 5.56 Of the 168,000 m² Secondary Industrial and Commercial Employment floorspace in the borough, approximately 21,620m² (or 12.9%) is currently vacant.
- 5.57 The level of vacancy of both Primary and Secondary Industrial and Commercial Employment floorspace suggests that employment is 2,350 to 3,185 below full capacity, on employment sites designated in the LDF.

Table 1: Estimated Existing Floorspace: Primary and Secondary Industrial and Commercial Employment Land

Site	Estimated Total Floorspace (m ²)	Estimated Total Employment Capacity		Vacant Floorspace (m ²)
		Min	Max	
Primary Industrial and Commercial Employment Land	1,463,053	16,165	20,730	113,089
Secondary Industrial and Commercial Employment Land	168,112	3,342	3,982	21,620
Total	1,631,165	19,507	24,712	134,709

Source: Thurrock Borough Council 2010

Note: Existing employment floorspace on sites that are proposed for re-designation to other uses in the LDF (e.g. housing) is not included in this table.

(vi) Vacant / Underused Land

- 5.58 In addition to existing floorspace, whether occupied or vacant, the Review also considered the amount of vacant and underused land on each of the primary and secondary industrial and commercial sites designated in the LDF. This was done in order to determine the potential level of employment intensification that could occur on existing sites. Vacant land is distinct from vacant floorspace – it is land which has no buildings on it and which is not intensively used for open storage. Underused land is land which contains temporary buildings and/or is sparsely used for open storage.

- 5.59 The assessment of vacant land does not include land identified as new employment sites or vacant land on existing employment sites that are proposed for re-designation to other uses in the LDF. The former are considered in the *Employment Sites Review* (2010) prepared by Tribal and the latter are considered in this report in Appendix 7.
- 5.60 The assessment identified 23.6 hectares of vacant and underused land which could provide space for between 1,940 and 3,070 new jobs if developed. Approximately 60% of the vacant and underused land is located within the West Thurrock Marshes Primary Industrial and Commercial Area.

Table 2: Vacant Land - Employment Land Summary

Industrial and Commercial Area	Total Vacant / Underused Site Area	Potential Class B Employment
Purfleet Industrial Park	0.81	65
Former BPB, London Road	1.23	690
Dolphin Estate / LaFarge	2.18	110
West Thurrock Marshes	14.43	685 – 1,390
Lakeside / Waterglade	1.52	120 – 475
434 – 436 London Road	0.32	25
Stanhope Industrial Park	3.11	245 – 315
Total	23.6	1,940 to 3,070

Source: Thurrock Borough Council 2010

Note: Vacant Land on sites that are proposed for re-designation to other uses in the LDF (e.g. housing) is not included in this table, including the southern part of the Botany Quarry/Tank Lane, which includes a vacant site area of 5.51 ha.

(vii) Planning Applications on Primary and Secondary Industrial and Commercial Employment Land since 2001

- 5.61 An assessment of permitted floorspace provides an indication of the level and type of floorspace that is in demand in Thurrock. The East of England Employment Land Review Guidance requires an assessment of the current supply in terms of sites with planning permission and how these translate into a yearly development pipeline supply.
- 5.62 In total, circa 280,000m² (Appendix 5: Table A5(c) and A5(d)) of employment floorspace was granted permission on those existing industrial and commercial sites designated in the LDF, since 2001. This represents a significant increase on the existing stock in 2001 and demonstrates developer interest in the industrial and commercial property market in Thurrock.
- 5.63 The most dominant land type permitted was warehousing, which accounted for over 60% of all floorspace permitted since 2001. This supports the evidence elsewhere in this report which demonstrates that Thurrock is a strategic warehouse and distribution location.
- 5.64 Industrial floorspace accounts for 25% of all permitted floorspace. This increase in floorspace is despite a general decline in manufacturing in

Thurrock and therefore suggests that other industry types (i.e. other than manufacturing) are taking up this type of floorspace.

- 5.65 The office property market in Thurrock has been described as being weak throughout this Employment Land Review. This is emphasised by the amount of permitted office floorspace, which accounts for just 6% of all permitted floorspace. The permitted planning applications for office space have generally sought ancillary office space to existing industrial and commercial sites. There have been few applications permitted for purpose built office complexes.
- 5.66 Of the net employment floorspace that has been permitted since 2001, approximately 64% has been implemented. The completed floorspace was dominated by warehouse floorspace which accounted for 84% of all completions. Implemented industrial floorspace accounted for 8.5% of all implemented floorspace whilst implemented office floorspace accounted for 7% of all implemented floorspace.
- 5.67 The amount of floorspace implemented varies considerably between land use types. 89% of the permitted warehouse and 74% of the permitted office floorspace has been implemented, whilst just 21% of the industrial floorspace has been implemented. This demonstrates a strong demand for warehouse floorspace in Thurrock. It also demonstrates that whilst office floorspace is under-represented in Thurrock compared with regional and sub-regional averages, when it is permitted there is demand for this type of space in Thurrock.

Table 3: Net Employment Floorspace Completions 2001 to 2009: Summary

Site	Total Net floorspace	Office	Industrial	Warehouse	Other
Primary Industrial and Commercial Areas	169,136	11,371	10,434	146,301	1030
Secondary Industrial and Commercial Areas	9,850	1,160	4,812	3,878	0
Major Applications Outside the Industrial and Commercial Areas	52,550	0	6,000	46,550	0
Total Net Floorspace	231,536	12,531	21,246	196,729	1030
Total Net jobs	3,595 to 5,345	695	665	2,185 to 3,935	50

Source: Thurrock Borough Council 2009

- 5.68 Monitoring information held by Thurrock Council indicates that there was 16,840m² of net permitted employment floorspace in Thurrock that remained outstanding at April 2009. There is not one single land use type that dominates this floorspace, however a loss of industrial floorspace is consistent with recent economic trends. This level of floorspace could generate up to 680 new employment opportunities if developed.

Table 4: Outstanding Net Employment Floorspace: Summary

Site	Total Net floorspace	Office	Industrial	Warehouse	Other
Outstanding Floorspace (m ²)	16,840	3,293	626	5,674	7,247
Outstanding Jobs	680	185	20	115	360

Source: Thurrock Borough Council 2009

(viii) Existing Employment Sites proposed for re-designation to other uses in the Local Development Framework

5.69 There are a number of existing Primary and Secondary Employment Sites which are proposed for re-designation for other uses, principally housing, the LDF. These proposed re-designations follow site assessment in the Thurrock Urban Capacity Study (2005), the 2007 Employment Land Review produced by URS, and the analysis that led to the Thurrock Strategic Housing Land Availability Assessment (SHLAA) (2010). Some of these sites have been granted planning permission for housing since 2001 and several are in the process of being redeveloped.

5.70 The sites are considered in detail in Appendix 7. They are:
They are:

- Askew Farm Site⁴
- Aveley Industrial Estate, Arisdale Avenue, South Ockenden (Southern part of the site)
- Baryta Close/Victoria Road, Stanford-Le-Hope
- Former BPB (Thames Board Mills) Site, Purfleet (western part of the site)
- Former Coal Yard Site, Purfleet
- Coward Bros and Star Industrial Estate, St John's Road, Chadwell St Mary
- Gumley Road, South Stifford
- Sandy Lane Pit and Merrydale Works, Chadwell St Mary
- School Field Road, West Thurrock
- South of London Road & Lyndale Estate, West Thurrock
- Titan Pit, Grays
- Wouldham Works ('Fiddler's Reach'), South Stifford

(ix) Proposed New Employment Sites

5.71 Most of the Proposed New Employment sites designated in the LDF are associated with Existing Employment and, therefore, have been considered as part of this study. There are, however, several Proposed Employment sites that are not associated with Existing Employment sites and have not,

⁴To the north of the Askew Farm site is the former Murco Oil Depot, land which has been allocated since the 1997 Local Plan for Oil and Chemical Storage. It is not considered in this document because of that designation, although it has been redeveloped as employment land and is known as the 'Cliffside Industrial Estate'.

therefore, been assessed in the main body of this report. For completeness, these sites are briefly considered in Appendix 8 of this report. They are:

- Wouldham Works, western strip (amended boundary), South Stifford
- Land Adjoining Tamarisk Road, South Ockendon
- Land North of Tilbury, Adj. Dock Approach Road, Tilbury
- Northern Site, Tilbury Power Station (New Employment Site – open green field site)
- Shell Haven ('London Gateway') (New Employment Site - formerly an oil refinery)
- Ponds Farm, Purfleet (New Employment Site – currently open Green Belt land)

(x) Other Sites

5.72 There are two additional sites considered in the study, which fall outside of its immediate remit. They are briefly considered in Appendix 9 of this report
They are:

- Cliffside Industrial Estate, West Thurrock – formerly Murco Oil Depot (industrial estate developed on land designated for Oil and Chemical Storage)
- Ultrabox Site, Purfleet By-Pass, Purfleet (employment site developed since 2003 – not designated in the LDF)

(xi) **Employment Land Audit Summary**

- West Thurrock / Lakeside Basin is the main employment hub in Thurrock in terms of floorspace and jobs. West Thurrock Marshes, which is within this area, has the greatest potential for intensification.
- There is 134,709m² of vacant floorspace at existing premises in the existing primary and secondary industrial and commercial areas. This floorspace could accommodate between 2,350 and 3,185 new jobs if fully occupied.
- 281,000m² of Class B floorspace was granted planning permission on Primary and Secondary Industrial and Commercial land between 2001 and 2009.
- There are 23.6 hectares of vacant / underused land in the existing primary and secondary industrial and commercial areas. If fully developed, there is potential for an additional 1,940 to 3,070 jobs on this land.
- There are several new employment sites proposed at the Preferred Options stage of the Site Allocations DPD that are located within the existing primary and secondary industrial and commercial areas. These sites should be redefined to be 'development sites' as they are already employment sites.

Section 6: Future Demand and Supply

- 6.1 This section of the Employment Land Review focuses on the assessment of future requirements for employment land and premises. This section will assess the employment targets for Thurrock as set out in the East of England Plan (2008) and supporting technical evidence base. This section will also, as suggested in the East of England Employment Land Reviews: Guidance Manual, consider the most up-to-date forecasting information for Thurrock. This comes in the form of the East of England Forecasting Model that is being used to inform the East of England Plan Review to 2031 and the Regional Economic Strategy Review.
- 6.2 The Thurrock Employment Land Review prepared by URS in 2007 provides an assessment of future requirements for employment land and premises based on the regional economic modelling used to inform the East of England Plan (2008). A review of this information will be conducted to compare the East of England Forecasting Model.

(i) East of England Plan Policy: Employment Forecasts

- 6.3 Roger Tym and Partners were commissioned by EERA and EEDA to make an assessment of policies E2 and H1 of the East of England Plan which relate to employment and targets respectively to consider whether these policies align (the alignment study).
- 6.4 It is noted in the alignment study that the alignment of housing and employment numbers is a policy objective in the East of England Plan, however it is also stated that Policy E2 and H1, and the numbers and distributions contained within them, have evolved separately. Consequently the relationship between employment numbers and housing numbers is not just a linear one and should not be considered below sub-regional level.
- 6.5 The alignment highlights that the housing number quoted in policy H1 is not an entirely jobs-led figure and that instead, it is the midpoint between a jobs-led figure and a figure generated by a different methodology intended to look at satisfying affordable housing need. Jobs and dwellings in policy H1 are therefore not fully aligned in methodological terms. The regional dwelling forecasts predict dwelling increases in the East of England 2001-2021 between 429,000 and 502,000 dwellings. Policy H1 is at the higher end of this range. The regional economic forecasts predict job increases in the East of England 2001-2021 between 200,000 and 500,000 jobs. The E2 level of 421,500 is therefore at the higher end and represents an increase of 16% on existing jobs.
- 6.6 The RPG policy development process was designed around delivering the “top 20 European region” objective. The necessary jobs growth was to be provided for, and housing growth proposed that would meet the labour demands of these new jobs. Bone Wells Associates, with Colin Buchanan and Partners and Business Strategies Limited, were commissioned by EERA, EEDA, GO-East and the Strategic Planning Authorities to explore the ramifications of the RES’s “top 20 European region by 2010” target. They did so via two growth scenarios, a ‘Business as Usual’ scenario, and a ‘High-Productivity Enhanced Growth’ scenario. Under “Business as Usual” Gross Value Added (GVA) per head could grow annually by 2.7% per year. To reach

a 'top 20' regional position as per the RES target, GVA per head would have to grow by 3.6% per annum.

- 6.7 The Thurrock Employment Study (2005) which was produced by Bone Wells Associates made an assessment of the deliverability of employment target at Thurrock (The Bone Wells Study).
- 6.8 The Bone Wells Study noted that the 'business as usual' employment projections were modelled on a trend based projection, based on a shift-share procedure, which relies on the past relationships between an industry's performance at local and regional level. An adjustment was made to include planned infrastructure in the Thames Gateway South Essex. Consequently the Thames Gateway South Essex Business as Usual sub-regional projection and Thurrock district projection drawn from it are not simple trend estimates but incorporate provision for additional growth.
- 6.9 The East of England Plan's Enhanced Growth 10 and Enhanced Growth 21 employment projections are both arbitrary employment projections, being the employment level required for the region to reach the Regional Economic Strategy target of becoming a 'top 20' European region. The EG10 projection was the number required to meet the target by 2010, and the EG21 projection the number required to reach the target by 2021. The Enhanced Growth 21 was not a number built up from industrial and economic analysis in the way that Business as Usual was. This level was increased for the Thames Gateway South Essex sub region to meet other planning objectives as opposed to economic objectives i.e. for Thames Gateway South Essex, the 55,000 additional employment sought was to bring closer together the 'imbalance' of 297,000 resident workers and 246,000 local jobs, by reducing out-commuting.
- 6.10 The Bone Wells Study recognised that the target of 26,000 jobs by 2021 was not based entirely on the sound economic forecasting of trends, but also included additional assumptions on jobs growth driven by policy intervention in the borough.

(ii) East of England Forecasting Model (2009)

- 6.11 The East of England Plan (2008) contained a policy that requires the East of England Regional Assembly to commence an early review to be completed by 2011. The review requires the Plan to extend its coverage to 2031.
- 6.12 The East of England Plan Review to 2031 is being informed by the East of England Forecasting Model (EEFM) that was developed by Oxford Economics and the East of England Development Agency to project economic, demographic and housing trends. This information will also be used to inform the Regional Economic Strategy.
- 6.13 The EEFM forecasts are based on past trends only. These past trends reflect past infrastructure and policy environments. The EEFM Technical Note (2009) recognises that forecasts are subject to margins of error. It is stated that the quality and reliability of data decreases at more detailed levels of geography as it does not take account of specific local circumstances and that under current data-quality conditions, models are most helpful for identifying trends, average growth rates and broad differentials between areas and sectors.

a) Baseline Demographic Change in Thurrock 2009 to 2021

- 6.14 The baseline data used in the EEFM states that at 2009 the population of Thurrock was 152,500. The following paragraphs use 2009 as the base date in which to analyse and compare projection data.
- 6.15 The baseline data projects that the population will increase to 167,500 in 2021 and will increase to 177,700 in 2031. The EEFM also assesses population change in Thurrock to take account of the existing economic uncertainties in the global and national economies. In doing so, the EEFM takes account of faster economic recovery and a more severe recession. Appendix 3: Table A3(a) to Table A3(e) set out the EEFM population growth data for Thurrock. The EEFM indicates that under a faster economic recovery, the population will increase to 167,700 in 2021 and 177,900 in 2031. This population growth level is only marginally more than the baseline data. The EEFM suggests that in the event of a more severe recession the population growth of Thurrock will slow and that an approximately 1,000 fewer people are projected to live in Thurrock.
- 6.16 The EEFM models a number of scenarios based on the policy implications of the East of England Plan. Of particular note are the scenarios that consider an unconstrained situation; that is, the forecast numbers do not take into account any policy or other constraints that might prevent their actual realisation on the ground and a scenario based on the continuation of the East of England Plan targets through to 2031.
- 6.17 In both scenarios, the population projections for Thurrock exceed the faster economic recovery scenario and greatly exceed the baseline data. The EEFM indicates that under an unconstrained scenario, the population will increase to 167,700 in 2021 and 178,300 in 2031 whilst under the continuation of the East of England Plan targets scenario the population will increase to 171,800 in 2021 and 186,300 in 2031. Under the continuation of the East of England Plan targets scenario, the population would be 4,300 greater than the projected baseline in 2021 and 8,600 greater in 2031.
- 6.18 In respect to the working age population of Thurrock, the EEFM states that in 2009 the population for Thurrock was 97,100. The baseline EEFM forecasts state that this population will grow to 104,100 in 2021 and 107,000 in 2031. This equates to working age population growth of 7.2% between 2009 and 2021 and 10.1% between 2009 and 2031. The faster economic recovery scenario forecasts that the population of working age will grow to 104,200 in 2021 and 107,200 in 2031. This equates to working age population growth of 7.3% between 2009 and 2021 and 10.4% between 2009 and 2031. By contrast severe recession scenario suggests that the working population will grow to 103,300 in 2021 and 105,800 in 2031. This equates to a working age population growth of 6.3% between 2009 and 2021 and 8.9% between 2009 and 2031. If the severe recession scenario takes place, therefore, it is projected that the working age population will be almost 1,000 people fewer in 2021.
- 6.19 The EEFM indicates that under an unconstrained scenario, the working age population will grow to 104,600 in 2021 and 108,100 in 2031, whilst under the continuation of the East of England Plan targets scenario the working age population will increase to 107,200 in 2021 and 113,100 in 2031. In each case

this level of projected working age population growth is greater than the baseline projections.

- 6.20 The total number of jobs in Thurrock is assumed by the EEFM to be 63,400 in 2009. The model accounts for the recession and states that in worst case scenario it could be 63,200. The total number of jobs in Thurrock is expected to increase by 7,300 between 2009 and 2021 based on the baseline assumptions. A faster economic recovery will only marginally increase the total number of jobs, however, in the event of a more severe recession the total number of jobs in Thurrock will only increase by 6,400.
- 6.21 The EEFM indicates that under an unconstrained scenario, the total number of jobs in Thurrock will increase to 71,400 in 2021 and 77,400 in 2031, whilst under the continuation of the East of England Plan targets scenario the jobs will increase to 71,900 in 2021 and 79,200 in 2031. The East of England Plan targets scenario suggests the total number of jobs will increase by 7,800 by 2021 and by 15,800 by 2031.
- 6.22 Using 2001 as the base date, under the East of England Plan targets scenario it is projected that the total number of jobs will increase by 10,100 between 2001 and 2021 and by 17,400 between 2001 and 2031. Notably, even under the job growth projections based on East of England Plan targets, the numbers fall significantly lower than the 26,000 jobs target for Thurrock. It is notable, however, that these projections do not take into account the approved London Gateway port facility that has yet to commence building works and once completed would generate up to 13,000 jobs.
- 6.23 The East of England Plan figure of 26,000 new jobs assumes significant positive policy intervention to achieve the target, including efforts to provide economic regeneration in the borough and sub-region, reduce unemployment and diversify employment opportunities across sectors, and reduce out-commuting.

b) Projected Employment Change by Sector in Thurrock 2009 – 2031

- 6.24 The baseline forecasts are the most appropriate in which to assess the projections as these will set out emerging trends.
- 6.25 The baseline forecast indicates that Thurrock will undergo significant structural change between 2009 and 2021 particularly in respect of the demands for Class B employment land. All aspects of the manufacturing sector will decline by between 21% and 37% during this period. There will be a significant decline in the extraction industries to 2021, with this industry not expected to have a presence in Thurrock beyond 2021. Despite the significance of the distribution industry in Thurrock, this sector is only expected to grow by 2.7% between 2009 and 2021. By contrast the construction sector is expected to grow by 28.5% and the electricity, gas & water sector is expected to grow by 41.8%.
- 6.26 In terms of total numbers of Thurrock residents employed, Appendix 3 Table A3(f) demonstrates the main growth areas in Thurrock between 2009 and 2021 are Transport and Communications and Health. Both these sectors are expected to grow by approximately 1,800 people during this time. The retail sector is also a growth area with an approximate increase of 1,000 people

between 2009 and 2021. Other significant growth areas include: construction; business services; and public administration.

- 6.27 The manufacturing sector is expected to experience the largest decline between 2009 and 2021. There are also projected declines in other personal services, agriculture and extraction industries.
- 6.28 It is notable that the projected employment change in Thurrock under the faster economic recovery scenario is broadly comparable to the baseline forecast and that the growth areas and sectors in decline remain the same.
- 6.29 Appendix 3 Table A3(h) sets out the projected employment change in Thurrock under the severe recession scenario. Whilst the projected employment growth is less between 2009 and 2021 compared to the baseline scenario, there is still significant growth of more than 1,700 people in the health and transport and communications sectors. There are also notable gains in the retail, construction and business services sector. The extraction industries, agriculture, hotels and restaurants and manufacturing are all expected to decline during this period.
- 6.30 Appendix 3 Table A3(k) sets out the projected employment change in Thurrock under the East of England Plan targets continuation scenario. This scenario forecast suggests that the total working population will increase by 9,000 between 2001 and 2021 and by 7,340 between 2009 and 2021. This is an increase on the baseline projections which suggests that the total working population will increase by 8,000 between 2001 and 2021 and by 6,400 between 2009 and 2021. The East of England Plan targets continuation scenario indicates that Transport and Communications (+1,990), Health (+1,970) and Retail (+1,330) will experience the largest growth between 2009 and 2021. There is also expected to be significant growth in Construction, Public Administration and Defence. By contrast the Manufacturing sector will decline by 1,320 people between 2009 and 2021 and there will also be declines in agriculture, extraction and Other Personal Services.

(iii) Thurrock Employment Land Review (2007) Prepared by URS

- 6.31 In 2007 URS collected the latest available current and historical employment data from the Office of National Statistics (ONS) for the local area, broken down by industry sector covering primary industry sectors, manufacturing and the service sector.
- 6.32 Table 9.2 in the URS Report sets out the employment forecast in Thurrock by sector. It is noted that employment is expected to increase from 56,773 in 2003 to 68,293 by 2021, an increase of 11,529 based on a trend analysis. The main growth in employment is estimated to occur in distribution, hotel and catering (6,486) and construction (2,575). The URS projections suggest that declines will occur in manufacturing (-1,092), transport and communications (-494) and mining / utilities (-155).
- 6.33 URS noted the weakness of relying on historic trends for employment forecasting and consequently made a series of scenario forecasts. The results of the scenario forecasts are set out in Table 9.2 of the URS Report. This table notes that employment in manufacturing is forecast to decrease by an average of between 0.42% and 1.59% per annum between 2003 and 2016. Employment in the transport and communication sectors is forecast to

increase by 0.19% for the high scenario and decrease for both the best estimate and the low scenario at 0.37% and 0.99% per annum. Employment in the distribution, hotel and catering sector is forecast to increase for the high, best estimate and low scenarios by 2.04%, 1.47% and 0.85% per annum respectively. Employment in the financial and business services sector is forecast to increase by an average of between 0.66% and 1.86% per annum between 2003 and 2021. Employment in the public services sector is forecast to increase by an average of between 0.55% and 1.74% per annum between 2003 and 2021.

- 6.34 The URS Report concludes that there is expected to be steady growth in the demand for employment land in the Thurrock area that this will be driven by growth in warehouse related floor space and a growing freight and distribution hub of activity. To a lesser extent, the forecast identifies a growth in finance and business services and a decline in manufacturing.

(iv) Translating Future Job Growth into Land and Floorspace Requirements

- 6.35 Translating employment job growth into employment land requirements requires a number of assumptions to be made about each sector. These include the location, type of premises, plot ratios and floorspace requirements for individual sectors to be identified. The first consideration has been the locational preferences of each sector and the breakdown of future employment growth by location (as this influences the type of premises), plot ratios and floorspace per worker, which translates jobs to land.
- 6.36 Assumptions have also been made on the level of floorspace required per worker and the building plot ratios in each location. Table 5 shows the plot ratio and employment density used to translate employment growth into floorspace requirements. The assumptions used reflect those used by Tribal (2010) in their assessment of employment on new employment sites in Thurrock.

Table 5: Employment Density

Use Class	Employment Densities (sq m per workspace)	Plot Ratios
B1 Offices	18	0.5
B2 General Industry	32	0.35
B8 General Warehousing	50	0.4
B8 Strategic Warehousing	90	0.4
D1	36	0.4
D2	90	0.4
D1 Education	50	0.4
Retail - Town / city centre	20	0.7
Retail - Food superstore	19	0.7
Retail - other superstore / retail warehouse	90	0.7
Retail Park / Lakeside	50	0.7
Hotel	50	0.5

Source: Tribal 2009

- 6.37 The final site specific density figures have been adjusted to take account of relevant planning permissions.
- 6.38 Tables 6 and 7 set out the floorspace and land requirements based on the East of England Plan continuation targets scenario forecast. East of England Plan continuation targets scenario forecast is used for the land requirement assessment as it has close synergy with Policy E1 of the East of England Plan and therefore represents the closest projected figure that Thurrock seeks to achieve. It is noted that whilst this forecast is based on the East of England Plan targets, the forecasted 9,000 job growth between 2001 and 2021 does not match the 26,000 new jobs required under Policy E1 of the East of England Plan. The forecasts are partially calculated on a trend-based approach and it is apparent that the London Gateway scheme at Shell Haven has not been taken into account. This scheme is projected to deliver approximately 13,000 jobs. In addition the forecasts only take account of the employee jobs in Thurrock and do not take account of people in self employment.
- 6.39 There are limitations to the forecast data. Consequently Table 5 only analyses floorspace and land requirements based on the East of England Plan continuation targets scenario forecast and does not take account of the job shortfall between the forecast and Policy E1 of the East of England Plan. Tables 6 and 7 are therefore indicative only of the projected increase and do not take account of other policy issues.
- 6.40 Table 6 indicates that in order to meet the identified employment growth, approximately 253,690m² to 441,320m² of new employment floorspace is required in Thurrock. This is a net floorspace figure that take accounts of the decline in manufacturing and the approximate release of 42,240m² of industrial floorspace. In reality, some of the land released will be used for other uses such as residential. The gross floorspace requirement to projected floorspace is approximately 296,450m² to 484,080m².
- 6.41 This level of floorspace translates into a net land requirement of 58.1 to 94.8 hectares needed by 2021. This land requirement has scope to be reduced as the calculations assume single storey developments and several of the employment sectors such as retail and business services may allow for intensification of land through for example increasing the storey heights.

Table 6: Indicative Floorspace Requirement based on the RSS Continuation – Employment Increase 2009 to 2021

	2009 to 2021	Floorspace Required (m ²)	Land Required (ha)
Agriculture	-30	-	-
Extraction	-5	-160	-0.5
Manufacturing	-1,320	-42,240	-12.1
Electricity, gas & water	240	7,680	2.2
Construction	830	26,560	7.6
Distribution	340	17,000 to 30,600	4.3 to 7.7
Retail	1,330	25,270 to 119,700	3.3 to 17.1
Hotels & restaurants	80	4,000	0.6
Transport & communications	1,990	99,500 to	24.9 to 44.7

		179,100	
Financial intermediation	80	1,440	0.3
Business services	860	15,480	3.1
Public administration & defence	700	12,600	2.5
Education	320	16,000	4.0
Health	1,970	70,920	17.7
Other personal services	-20	-360	-0.1
Total	7,365	253,690 to 441,320	58.1 to 94.8

Source: Thurrock Borough Council 2009
Figures Rounded

Table 7: Indicative Floorspace Requirement based on the RSS Continuation – Employment Increase 2009 to 2021 by Use Class

Use Class	2009 to 2021	Floorspace Required (m ²)	Land Required (ha)
A1 – A3 (includes C1 hotels)	1,410	4,000	3.9 to 17.7
B1	1,620	29,160	5.8
B2	-1,085	-34,720	-10.4
B8	3,160	143,060 to 236,260	36.8 to 60
D1	2,290	86,920	21.7

Source: Thurrock Borough Council 2009
Figures Rounded

(v) The Thurrock Employment Land Requirement (using the information provided by Bone Wells and URS)

- 6.42 The Bone Wells Report (2005) set out the projected employment land requirements for the period to 2021, based on the draft East of England Plan targets. The Bone Wells Report stated that draft East of England Plan targets represent a quantum leap of employment increase. The Bone Wells Report stated that it is sceptical whether the target is achievable.
- 6.43 Table 5.1 of the Bone Wells Report set out the quantitative requirements for employment land by 2021 in Thurrock. It indicates a net requirement of 114 hectares of employment land is needed during this period.
- 6.44 The URS Report (2007) provided an assessment of the floorspace and land requirements for Thurrock to 2021. The URS report assessed a business as usual scenario based on historical trend analysis to estimate the land employment forecasts. It was estimated that the average growth in employment would amount to between 2.82 and 5.24 hectares per year or a total of 45.2 and 83.8 hectares by 2021.
- 6.45 The URS Report stated that if the London Gateway development at Shell Haven is implemented, it will have a significant impact on the future estimate for employment land. The URS Report incorporates the London Gateway scheme into a further scenario. Under this scenario the amount of employment land required amounts to an average of 15.18 hectares developed per year with an estimated 242.9 hectares by 2021. The URS Report calculates that this would amount to a need for an additional 337,394m² of employment floorspace. This assessment is of Class B

employment floorspace space and land and does not take account of other employment generating land uses.

(vi) The East of England Employment Target for Thurrock (Policy E1)

- 6.46 Tables 6 and 7 above sets out the floorspace and land requirements in Thurrock to 2021 based on the East of England Plan continuation targets scenario forecast. However, this forecast does not meet the employment target set out in Policy E1 of the East of England Plan as the forecast is partially calculated on a trend-based approach. The table below sets out how the 26,000 jobs target will be achieved in Thurrock

Table 8: Components of Job Growth

	Jobs Numbers
RSS Continuation Scenario: 2001 to 2009 Job growth	1,660
RSS Continuation Scenario: 2009 to 2021 Job growth	7,340
Residual – Inward Investment	17,000
Total	26,000

Source: EEDA / Oxford Econometrics / Thurrock Council 2009
Figures Rounded

Table 9: Residual (Inward investment) Job Growth 2009 to 2021

	Jobs Numbers
London Gateway Port Facility (Shell Haven)	13,000
West Thurrock / Lakeside Basin (Retail Expansion)	2,500
Residual – Remaining inward required to meet the job target	1,500
Total	17,000

Source: EERA / RSS EIP / Thurrock Council 2009
Figures Rounded

- 6.47 Looking forward to 2021, the basic elements of potential employment growth in Thurrock fall into two categories. First there is the trend growth based on the East of England continuation scenario, which is projected to be +9,000 jobs. Second there are the possible impacts of additional inward investment (referred to as residual in table 8 and 9) particularly at London Gateway (Shell Haven), with a potential +13,000 jobs and the expansion of Lakeside with a potential +2,500 jobs. There will also be additional inward investment through the efforts of the TTGDC.
- 6.48 The residual jobs growth amounts to 1,500 jobs. The Bone Wells Report states that for the growth to be achieved, additional inward investment is necessary. The Bone Wells Report notes that the TTGDC are a critical body for improving the conditions of land in Thurrock and to make the Borough more attractive for inward investors. However, the Bone Wells Report is sceptical about whether the residual employment requirement to meet Policy E1 is achievable. A floorspace requirement above that identified from the projected changes is necessary to meet the residual jobs growth. The type of floorspace required is a political decision, however if Class B1 office space were desired to improve the quality of Thurrock's office market, then an additional 27,000m² of space would be required. Approximately 75,000m² to 135,000m² of floorspace would be required if it were considered that building on Thurrock's economic strengths (i.e. strategic warehousing) should be the preferred approach.

- 6.49 The Council has allocated sufficient new industrial and commercial land to meet the requirements of the regional target of 26,000 new jobs by 2021. The *Tribal Employment Sites Review 2010* provides an assessment of the employment capacity of the new industrial and commercial sites. The Council will continue to work with the TTGDC to encourage inward investment to strive to meet the targets set out in Policy E1.

(vii) Spaceless Job Growth

- 6.50 In 2001, the proportion of people that worked from home in Thurrock was 7% of the working population. Given the significant increase in small businesses in Thurrock over recent years and their increasing importance within the local economic structure, it is likely that the proportion of people that work from home will increase. One of the largest growth sectors in Thurrock is business services which, more than any other sector, are flexible in terms of business location and in many instances can be undertaken from home.
- 6.51 The population of Thurrock is expected to increase from 143,200 in 2001 (Census 2001) to 171,800 in 2021 (East of England Continuation Scenario). This amounts to a population increase of 28,600. The resident working population of Thurrock is projected to be 78,700 in 2021. Using this available data it is calculated that the number of Thurrock residents that that will work from home will amount to approximately 5,500. Assuming that 7% of the resident working population of Thurrock works from home, then 700 jobs will come from this source. The 7% proportion is, however, expected to increase by 2021.
- 6.52 With increased home working and flexible employment premises, a degree of future employment growth will be spaceless growth. For the jobs to floorspace translation, it can be assumed that 15% of all future employment growth will be spaceless. This assumption is based on 7% home-working i.e. the existing level in the 2001 Census and the existing vacant floorspace identified by the Employment Land Audit in Section 6 being able to absorb some of the jobs growth. On this basis 3,900 of the 26,000 jobs could be delivered without the need for additional space.

(viii) Demand and Supply Analysis

- 6.53 Natural employment growth between 2001 and 2021 is expected to yield 9,000 additional jobs in the Borough. This figure falls short of the East of England Plan requirement to make provision for 26,000 jobs between 2001 and 2021. The natural growth figure does not take into account planned major works at London Gateway and the emerging East of England Plan policy requirement to significantly increase retail floorspace at Lakeside and other inward investment programmes.
- 6.54 Planning permission has been granted for London Gateway to become a major new deepwater port. In addition to the new port, the development will include a large logistics parks. Outline planning permission has been granted for circa 883,000 m² of employment floorspace.
- 6.55 The Thurrock Lakeside Basin Single Issue Review Examination-in-Pubic, held in July 2009, considered the principle of whether Lakeside should become a regional town centre. The Panel Report, which was published in August 2009, stated that Lakeside should be expanded by 50,000 m² of net comparison

floorspace by 2019 and recommended that the centre be designated a regional centre. The Secretary of State's approved revision was published in January 2010 and accepted those recommendations.

- 6.56 A number of existing employment sites have been considered unsuitable for continued employment use and have been considered as appropriate housing sites in the Thurrock SHLAA. The designation of such sites would result in a loss of both existing employment capacity and vacant land that could support employment. In consequence, re-designation of employment land to housing would result in a loss of employment capacity, both existing and potential, equivalent to nearly 11,000 jobs (see Appendix A5 (g)). In total 170 hectares of employment land has been proposed for re-designation to residential uses. The sites affected are considered in Appendix 7 of this report.
- 6.57 Table 10 considers the factors affecting both demand for and supply of employment land in Thurrock and makes an assessment of total demand for jobs compared to supply. It takes account of information held by Thurrock Borough Council and Tribal's *Employment Sites Review* (2010).
- 6.58 A number of the existing industrial and commercial employment areas have vacant land that is no longer in use. This land provides an opportunity on which to develop new employment opportunities and maximise the use of land. Vacant land on existing employment sites that will remain during the lifetime of the plan could deliver between 1940 and 3070 additional jobs. In addition, a number of existing industrial and commercial employment areas have vacant floorspace that is currently being marketed for new occupiers. Whilst this floorspace is existing and therefore has been accounted for as existing capacity, their occupation could provide circa 2350 – 3185 new jobs. These issues are taken into account in Table 11.

Table 10: Demand and Supply Analysis (2001 to 2021)

		Min Jobs	Max Jobs
	RSS Target	26,000	26,000
1.	Demand		
A.	Job Growth 2001 to 2009	1,660	1,660
B.	Projected demand 2009 to 2021	7,340	7,340
C.	London Gateway	11,000	13,000
D.	West Thurrock / Lakeside Basin (Retail Expansion)	2,500	2,500
E.	Residual (further inward investment)	3,500	1,500
F.	Total	26,000	26,000
2.	Supply		
G.	Jobs from Completed Floorspace 2001 to 2009	3,595	5,345
H.	Jobs from Outstanding Permitted Floorspace	680	680
I.	New Primary Industrial and Commercial Areas (excluding London Gateway)	8,934	12,779
J.	New Secondary Industrial and Commercial Areas	860	1,419
K.	Mixed-Use	1,834	2,325
L.	Proposed Other	850	861
M.	London Gateway	11,000	13,000
N.	West Thurrock / Lakeside Basin (Retail Expansion)	2,500	2,500
O.	Lakeside Intensification	4,041	4,866
P.	Home-working	700	700
Q.	Total existing employment capacity of employment sites re-designated to housing	-6,490 ⁵	-6,490
R.	Total employment potential of vacant land on employment sites re-designated to housing	-3,950	-3,950
S.	Total Supply	24,554	34,035
3.	Balance	-1,446	+8,035

Source: Thurrock Borough Council 2010 / Tribal 2010

⁵ Employment lost owing to the designation of Askew Farm as a housing site has been included for completeness, although Askew Farm is not a designated employment site.

Table 11: Adjustment for Vacant Land and Revised Balance

T.	Potential Class B employment from vacant land on existing employment sites	1,940	3,070
U	Potential Class B employment from existing vacant floorspace	2,350	3,185
V.	Sub total	4,290	6,255
4.	Revised Balance	+2,844	+14,290

Source: Thurrock Borough Council 2010 / Tribal 2010

Notes on Tables 10 & 11:

1. Projected Demand is based on the RSS 2031 Review economic forecasts
2. I, J, K, L are all from Tribal 2010 data source
3. $F = A+B+C+D+E$
4. Q = Total existing employment capacity of employment sites lost to housing during the lifetime of the plan (see Appendix 7).
5. R = Total employment potential of vacant land on employment sites lost to housing during the lifetime of the plan (see Appendix 7).
6. $S = G+H+I+J+K+L+M+N+O+P-Q-R$
7. T = Potential employment capacity of vacant land on existing employment sites
8. U = Potential Class B employment from existing vacant floorspace
9. $V = T + U$
10. $4 = 3 + V$
11. Projected Demand is based on the RSS 2031 Review economic forecasts
12. I, J, K, L are all from Tribal 2010 data source

6.59 Tables 10 indicates that the total supply of employment land, as proposed in the LDF, can deliver capacity for between 24,554 and 34,035 jobs in the borough, the mean average between the high and low figures being 29,300 jobs. When revised to take into account the potential employment capacity of vacant land on employment sites and existing vacant floorspace (Table 11), the figure is revised upwards to between 28,844 and 40,290 jobs in the borough (34,600 average). Ultimately, the supply is likely to be even higher owing to:

- Further intensification at Lakeside, following the Lakeside Single Issue Review, over and above the intensification of Lakeside sites considered in the table (Row O).
- Additional employment space and jobs coming forward from additional public services and retail provision not identified, including development at Grays and other centres.

(vi) Summary of Thurrock's Future Demand and Supply of Employment Land

- The East of England Plan employment target for Thurrock is based on regional and national aspirations as opposed to forecast economic trends.
- The East of England Plan Review 2031 employment projections are based on economic trends.
- Based on the East of England Plan Review 2031 projections the growth employment sectors in Thurrock to 2021 will be: Transport and Communications; Health; Retail; Construction; and Public Administration.
- Based on the East of England Plan Review 2031 projections the employment sectors that will decline in Thurrock to 2021 will be: manufacturing; extraction; and personal services.
- Based on the East of England Plan Review 2031 projections, the maximum job growth in Thurrock between 2001 and 2021 will be 10,100.
- Between 253,900 and 441,320m² of new floorspace is required in Thurrock between 2009 and 2021 to meet the trend based employment growth. This equates to between 58.1 and 94.8 hectares. Approximately 45% of this land is required by the Transport and Communications sector.
- Between 137,500 and 230,700m² of net additional Class B floorspace is required in Thurrock between 2009 and 2021 to meet the trend based employment growth.
- Up to 15,500 jobs are to be created through policy interventions at London Gateway and retail expansion at West Thurrock/Lakeside Basin.
- Either an additional 27,000m² of office floorspace or between 75,000m² and 135,000m² of additional warehouse floorspace would meet the residual jobs growth. This figure will vary according to the political approach to the residual growth.
- Approximately 7% of the 26,000 jobs growth could be accommodated by spaceless growth e.g. home-working and intensification of existing floorspace through changing work practices and utilising vacant floorspace.
- The supply of employment land proposed in the LDF will be sufficient to accommodate the 26,000 jobs growth required in the borough during the life time of the plan.

Section 7: Summary and Conclusions

- 7.1 This Section sets out our recommendations in respect of the future employment land policy approach. The primary purpose of the recommendations is to inform the emerging Thurrock Local Development Framework. Particular emphasis is given to addressing the key objectives of the study as follows:
- Consider whether existing employment sites and allocations are appropriate to meet needs of Thurrock;
 - Consider the nature and spatial distribution of employment land and premises requirements based on up-to-date indicators of future demand.
 - Consider whether it is appropriate for existing employment uses to be re-designated to housing and other uses through the LDF.
- 7.2 Policy E1 of the East of England Plan sets out indicative targets for net growth in jobs for the period 2001-2021. The policy requires the Essex Thames Gateway sub-region to achieve an indicative net jobs growth of 55,000 jobs between 2001 and 2021. Policy ETG5 states Thurrock should provide 26,000 of these jobs. This Employment Land Review together with the Tribal *Employment Sites Review* (2010) seeks to provide evidence to demonstrate that there is sufficient capacity on the industrial and commercial sites to contribute towards the delivery of 26,000 jobs in Thurrock.
- 7.3 In accordance with national and regional policy requirements, this report has provided a comprehensive review of existing employment sites to supplement the previous studies undertaken i.e. the 'Thurrock Council Employment Study' (2005) prepared by Bone Wells Associates, the 'Thurrock Employment Land Review' (2007) prepared by URS and 'An Assessment of Class B Land in Thurrock' (2008) prepared by Atkins. The review of sites was undertaken in accordance with the East of England Employment Land Review Guidance Manual (2008).
- 7.4 Sections 4, 5 & 6 of this report provide an assessment of the existing stock of employment land and premises in Thurrock. These sections demonstrate that:
- There is 515 ha of existing employment land designated in the LDF, and circa 1.58 million m² of Class B use floorspace⁶.
 - On this employment land, there is currently 23.6 ha of vacant land and approximately 134,000m² of vacant B use-class floorspace;
 - Vacancy rates for both land and floorspace are low in Thurrock areas which, implies strong demand relative to supply.

⁶ This figure takes into account the proposed re-designation of employment sites E3b (Marley Works, South Ockendon), E3g (Globe Works, Little Thurrock) and the southern part of E1b (Botany Quarry)

- 7.5 Section 6 of this report summarises the assessment of future employment land and floorspace need in Thurrock. The analysis was founded on a range of analytical and empirical research techniques including:
- Economic and employment appraisal of Thurrock; and
 - Employment forecasts converted to quantitative estimates of B Use Class floorspace demand.
- 7.6 The assessment of future needs concluded that between 253,900 and 441,320m² of Class B floorspace will be required to meet the requirements of the projected growth to 2021 and either an additional 27,000m² of office floorspace or between 75,000m² and 135,000m² of additional warehouse floorspace would be needed to meet the residual jobs growth i.e. the additional requirement needed to meet the East of England Plan requirement.
- 7.7 Tables 6 and 7 (Section 6) provide an illustration of the gross floorspace requirement in Thurrock by industrial sector and use class. It is important to note that these illustrations are based largely on trend based assumptions and do not reflect policy priorities. Consequently, the tables are intended to set out an indication of the nature of future demand rather than a prescriptive requirement.
- 7.8 The identified growth sectors in Thurrock to 2021 which will generate the greatest demand for land and floorspace are: Transport and Communications; Health; Retail; Construction; and Public Administration. By comparison the manufacturing; extraction; and personal services sectors are expected to decline during this period.
- 7.9 Bearing in mind the limitations of using a quantitatively led policy approach, it is of critical importance for the LDF to ensure that employment land provision is of sufficient quality in terms of size, type and location. Moreover, critical to the qualitative argument is the need for allocated sites not to be overly constrained in ways which will thwart the reality of delivering development schemes.

(i) Recommendations

- 7.10 This report has considered the existing industrial and commercial areas and whether any designation or boundary changes are required. A site by site assessment of recommended changes is set out in Appendices 6, 7, and 8.
- 7.11 Thurrock has sufficient land designated in the LDF to meet the employment land demand forecasts set out in the RSS projections. There are a number of policy interventions and flagship projects that are not considered in the employment projections, notable the proposed London Gateway port facility and the expansion of retail at Lakeside. The land supply at Thurrock is also sufficient to meet the expected demand arising from these interventions. It is appropriate, therefore, for the existing employment sites identified at Appendix 7, to have been re-designated for other uses (notably housing) in the Local Development Framework.
- 7.12 The demand and supply analysis identifies enough land to generate circa 3,300 surplus jobs (mean average) beyond the identified demand and interventions. In reality this figure is likely to be higher, as illustrated in Chapter 6, table 10 & 11 and supporting text. This supply is important to

store as a reserve to meet the employment land requirements if a major scheme is delayed. This reserve will also contribute to meeting demand beyond the period to 2021. The supply of land must be monitored to ensure that it meets the demands of the economy and does not result in an over-supply.

- 7.13 The review of existing employment sites has identified a number of sites that require amendments to the site boundary or designation as employment land in the LDF. The recommended amendments are identified and set out in the appendices. Several of these boundary amendments are minor, however a notable change recommended is the reduction in size of site E1b (Botany Quarry / Tank Lane, Purfleet). The 'Ultrabox' site south of Purfleet By-Pass should be designated as an Existing Primary Industrial and Commercial Area.
- 7.14 The evidence gathered within this employment land review has identified the growing importance of small and medium sized enterprises within the economy. This importance should be noted in policy and development proposals for employment floorspace should seek to provide a range of employment unit sizes to meet this growing need.
- 7.15 Thurrock is an important location for large-scale strategic warehousing. This form of accommodation should be encouraged within Thurrock, however a policy should be developed that seeks to minimise the impacts of large-scale warehousing on the surrounding area and consideration could be given to encouraging the provision of accommodation for small and medium sized enterprises within such developments to harness the growing need for small scale accommodation.
- 7.16 It is clear from the research within this document that declines are expected in manufacturing and the extraction industries. It is important that a criteria based policy is developed that manages the release of this land as it becomes available. It is important that where the release of employment land is proposed, it is demonstrated that the land in question is genuinely redundant and that there is no reasonable prospect of an alternative employment generating use taking up the land.
- 7.17 Such a policy should be flexible enough to allow the appropriate change from one employment generating use to another use to allow for the diversification of Thurrock's economy. It will, however, still need to protect the core business activities in the Borough.
- 7.18 The review of sites has identified a supply of vacant land within existing employment areas that could deliver an increase in floorspace. This land, together with other unidentified vacant land, may need a form of intervention and/or policy to bring it forward for development.
- 7.19 Thurrock has a small office sector compared with neighbouring areas and national averages. The available office floorspace currently on the market is generally small-scale and poor second-hand stock. Whilst the demand for office floorspace is low in Thurrock, it is apparent from the planning application data that there is a demand for office space and this comes in the form of ancillary accommodation to serve the existing industrial and warehouse floorspace. Furthermore, there is strong political desire to diversify Thurrock's economy to avoid reliance upon a small number of sectors. To achieve this, a policy intervention is required to encourage and promote a

high quality office market in Thurrock. Consequently a policy is required that addresses these points.

- 7.20 Home-working currently accounts for about 7% of all employment in Thurrock. This proportion is expected to increase over the coming years. Whilst home-working generally falls under permitted development, there will be some instances where planning permission will be required. A policy will be required that manages the development of small scale office space in residential areas to ensure that residential amenity is not adversely affected.
- 7.21 The importance of technology is growing rapidly in the UK economy. It is becoming a valuable resource for all sectors and particularly the transport and communications sectors, which are important growth sectors in Thurrock. To ensure that Thurrock remains a nationally important strategic distribution location, it is recommended that telecommunications and broadband connections are incorporated into new developments.
- 7.22 The Retail sector has been identified as a growth employment sector in Thurrock that provides high value accommodation. This asset needs to be protected and enhanced so that Thurrock can build upon its economic strengths. The East of England Lakeside Single Issue Review has identified the need for an expansion of Lakeside to create a regional town centre. This policy arena will set the parameters in which to develop this sector.

(ii) Monitoring and Review

- 7.23 Given the complexity of issues on many of the employment sites within the portfolio it will be important to review the employment land supply at regular intervals, preferably within the context of the annual monitoring report. Assumptions regarding the supply of employment land including the potential yield of employment land from mixed use sites and the delivery of vacant land/sites should be addressed as part of this review.

Appendix 1: Thurrock's Economy: Tables

Table A1(a): Summary of main employment changes in Thurrock 1991-2001

Sector	1991	2001	+/- Change	% Change
Extractive, Gas, Electricity, Water	2,180	440	-1,740	-80
Manufacturing	8,950	8,150	- 800	- 9
Construction	3,930	5,340	+ 1,410	+ 36
Retailing	6,170	11,940	+ 5,770	+ 94
Wholesaling	3,160	4,770	+ 1,610	+ 51
Hotels & catering	2,890	4,120	+ 1,230	+ 43
Transport	8,010	8,270	+ 260	+ 3
Communications	200	400	+ 200	+100
Financial services	880	600	- 280	- 32
Business services	3,010	3,510	+ 500	+ 17
Other Financial & Business services	980	1,290	+310	+32
Public Administration / Defence	1,810	1,410	-400	-22
Education	2,510	3,880	+1,370	+ 55
Health	2,390	3,420	+1,030	+ 43
Other (Personal Services)	2,390	2,580	+ 190	+ 8
Total	49,480	60,100	+10,620	+21

Source: Annual Business Inquiry / Experian and Bone Wells Self-Employment estimates

Table A1(b): Employment by Industry Sector: Industry 1993 - 2003 Change

Sector	1993	2003	+/- Change	% Change
Agriculture, hunting and forestry	44	69	+25	+56.8
Mining and quarrying	119	49	-70	-59
Manufacturing	7,456	6,760	-696	-9.3
Electricity, gas and water supply	700	115	-585	-84
Construction	1,211	3,353	+2,142	+177
Wholesale and retail trade	9,923	17,759	+7,836	+79
Hotels and restaurants	2,237	3,791	+1,554	+69
Transport and communication	7,842	7,553	-289	-4
Financial intermediation	632	635	+3	+0.5
Business services	3,780	4,378	+598	+16
Public administration	1,460	1,477	+17	+1.2
Education	2,351	4,227	+1,876	+80
Health and social work	4,064	4,270	+206	+5
Community and other services	1,810	2,240	+430	+24
Total	43,629	56,676	13,047	30

Source Office of National Statistics, Annual Business Inquiry

Table A1(c): Employment by Industry Sector: 2001 - 2007 Change

Sector	2001	2007	+/- Change	% Change
Manufacturing	7,100	5,000	-2,100	-29.6
Construction	3,900	2,600	-1,300	-33.3
Distribution, Hotels and Restaurants	20,100	22,600	+2,500	+12.4
Transport and Communications	6,800	8,000	+1,200	+17.6
Banking, Finance and Insurance	4,400	6,400	+2,000	+45.5
Public Administration, Education and Health	8,600	9,400	+800	+9.3
Other	2,500	3,000	+500	+20
Total	53,400	57,000	+3,600	+6.7

Source: Office of National Statistics 2009

Table A1(d): VAT Registered Businesses by Industry 2001 - 2007

Sector	2001	2007	+/- Change	% Change
Agriculture, Forestry and Fishing	45	50	5	+11.1
Mining, Quarry, Electricity, Gas and Water Supply	5	5	0	0
Manufacturing	250	265	+15	+6
Construction	555	715	+225	+28.8
Wholesale, Retail, Repairs	685	780	+95	+13.9
Hotels and Restaurants	175	210	+35	+20%
Transport, Storage and Communication	370	425	+55	+14.9
Financial Intermediation	20	15	-5	-33.3
Real Estate, Renting and Business Activities	625	915	+290	+46.4
Public Administration, Other Community, Social and Personal Services	175	190	+15	+7.9
Education, Health and Social Work	35	50	+15	+42.9
Total	2,940	3,620	+680	+23.1

Source: Office of National Statistics 2009, HMRC

Table A1(e): Business Size Band

	1993		1998		2003		2006	
Employment Numbers	Level	% of Total	Level	Level	% of Total	% of Total	Level	% of Total
1 to 10	1,723	71.5	3,126	78.9	3,416	79.1	3,796	81.7
11 to 49	541	22.4	640	15.6	675	16.2	623	13.4
50 to 199	114	4.7	150	4.7	202	3.8	191	4.1
200 or more	32	1.3	38	0.9	37	1.0	38	0.8
Total	2,410	100	3,954	100	4,330	100	4,648	100

Source: Atkins, Annual Business Inquiry

Table A1(f): Size of Business as a Percentage

	Employment Numbers: Size Band			
	1 to 10	11 to 49	50 to 199	200+
Agriculture	0.1	0.0	0.0	0.0
Extraction Industries	0.1	0.0	0.0	0.0
Manufacturing	4.8	0.8	0.3	0.2
Construction	13.6	0.9	0.1	0.0
Energy and waste	0.7	0.2	0.1	0.0
Wholesale	4.3	0.6	0.2	0.1
Retail	14.5	3.5	0.8	0.3
Hotel and Restaurants	4.2	1.2	0.3	0.0
Transport	7.8	1.7	0.6	0.1
Telecommunications	0.7	0.2	0.0	0.0
Finance	0.8	0.3	0.0	0.0
Business services	21.3	1.4	0.4	0.0
Public Administration	0.3	0.2	0.1	0.0
Education	0.9	0.6	0.7	0.1
Health and Social	3.0	1.3	0.2	0.0
Recreation	2.4	0.3	0.1	0.0
Other	2.2	0.2	0.0	0.0
Total	81.7	13.4	4.1	0.8

Source: Annual Business Inquiry 2006 (NomisWeb 2009)

Table A1(g): Industrial Breakdown by Size of Business as a Percentage

	Employment Numbers: Size Band			
	1 to 10	11 to 49	50 to 199	200+
Agriculture	86	0	14	0
Extraction Industries	100	0	0	0
Manufacturing	80	12	5	2
Construction	93	6	1	0
Energy and waste	69	21	8	2
Wholesale	83	12	4	1
Retail	76	18	4	1
Hotel and Restaurants	73	22	5	0
Transport Industries	76	16	6	1
Telecommunications	78	17	5	0
Finance	70	28	2	0
Business Services	92	6	2	0
Public Administration	50	32	14	4
Education	38	29	30	3
Health and Social	67	28	4	1
Recreation	85	11	4	0
Other	90	9	2	0

Source: Annual Business Inquiry 2006 (NomisWeb 2009)

Table A1(h): Gross Value Added by Area 1996 to 2006

	1996 (£m)	% of East of England GVA	2001 (£m)	% of East of England GVA	2006 (£m)	% of East of England GVA
England	580 270	-	761 950	-	985 477	-
East of England	58 330	-	75 966	-	100 303	-
Essex CC	12 434	21.3	16 025	21.1	21 712	21.6
Southend-on-Sea	1 487	2.5	2 023	2.6	2 456	2.4
Thurrock	1 494	2.6	1 773	2.3	2 261	2.3

Source: Office of National Statistics 2009

Table A1(i): Gross Value Added by Per Head 1997 - 2006

	1997 (£)	2001 (£)	2006 (£)
East of England	11,759	14,067	17,890
Essex CC	10,309	12,209	15,951
Southend-on-Sea	9,678	12,617	15,366
Thurrock	11,950	12,371	15,190

Source: Office of National Statistics 2009

Table A1 (j): Economic Activity in Thurrock

All People			
	Thurrock	Thurrock (%)	East (%)
Mar 2001	75,000	80.7	81.8
Jun 2009	80,000	79.9	81.8
Males			
	Thurrock	Thurrock (%)	East (%)
Mar 2001	41,000	86.9	87.7
Jun 2009	42,300	83.8	86.3
Females			
	Thurrock	Thurrock (%)	East (%)
Mar 2001	34,000	74.2	75.5
Jun 2009	37,700	75.6	76.9

Source: ONS annual population survey / Nomisweb 2010

Table A1 (k): Self Employment in Thurrock

All People			
	Thurrock	Thurrock (%)	East (%)
Mar 01 - Feb 02	6000	6.8	10
Jul 08 - Jun 09	8600	8.6	10.2

Table A1 (l): Residents receiving Job Seekers Allowance

All People			
	Thurrock	Thurrock (%)	East (%)
Apr 2001	2,000	2.3	1.7
Jan 2010	4,400	4.7	3.6
Males			
	Thurrock	Thurrock (%)	East (%)
Apr 2001	1,400	3.2	2.5
Jan 2010	3,100	6.4	4.9
Females			
	Thurrock	Thurrock (%)	East (%)
Apr 2001	600	1.3	0.9
Jan 2010	1,300	2.9	2.1

Source: ONS annual population survey / Nomisweb 2010

Table A1 (m): Full Time Earnings in Thurrock 2002 to 2008

All People			
	Thurrock (£)	East (£)	Great Britain (%)
2002	435.8	415.9	392.7
2009	517.4	509.4	491.0

Source: ONS annual population survey / Nomisweb 2010

Table A1 (n): Gross Weekly Earnings in Thurrock 2008

All People			
	Thurrock (£)	East (£)	Great Britain (%)
Males	557.40	565.80	534.40
Females	442.90	432.60	426.60

Source: ONS annual population survey / Nomisweb 2010

Appendix 2: Thurrock's Land and Property Markets

Table A2(a): Land Transactions in Thurrock 2007/08

Name	No. Units	Size of Units	Let Price	Sale Price	Comments
The Cliffside Trade Park	2	1,130m2 to 1,535m2	8.00 per sqft	n/a	n/a
Exton Estate, Dolphin Point	14	457m2 to 1,770 m2	n/a	1,279 to 1,593 per m2	N/a
QED Distribution Park	3	10,506m2	n/a	n/a	n/a
South Ockendon	1	46,451m2	n/a	n/a	n/a
Equity Estate's Clipper Park, Thurrock Park Way	24	167m2 to 364m2	n/a	n/a	Three units are under offer
Thurrock Trade Park	22	205m2 – 966m2	91.49 per m2	n/a	n/a
Frogmore Industrial Estate	11	From 465m2	n/a	n/a	n/a
Sergo's J31 Business Centre	Starter Units	From 102m2	n/a	n/a	n/a
Magnet Distribution Centre	1	2,990m2	n/a	n/a	n/a
Trafalgar Works, Globe Industrial Estate	3	2,135m2 to 21,366m2	n/a	n/a	n/a
Gateway 25	2	Combined space of 5,385m2	n/a	n/a	n/a

Source: Kemsley 2008

Table A2(b): Total Non-Domestic Floorspace in Thurrock

	Thurrock		Basildon		Southend-on-Sea	
	Total	%	Total	%	Total	%
Total Retail Floorspace (m2)	416,000	20.6%	354,000	17.2%	424,000	34.8%
Total Office Floorspace (m2)	85,000	4.2%	229,000	11.1%	244,000	20.0%
Total Industrial Floorspace (m2)	597,000	29.6%	812,000	39.4%	275,000	22.6%
Total Warehouse Floorspace (m2)	852,000	42.2%	622,000	20.2%	227,000	18.6%
Total Other Floorspace (m2)	66,000	3.2%	40,000	1.9%	46,000	3.8%
Total Non-Domestic Floorspace (m2)	2,016,000	100%	2,057,000	100%	1,215,000	100%

Source: Valuation Office 2005

Table A2(c): Rateable Value of Non Domestic Floorspace

	Thurrock		Basildon		Southend-on-Sea	
	Total	%	Total	%	Total	%
Total Rateable Value (£)	174,129,000	100	150,612,000	100	82,622,000	100
Rateable Value: Retail (£)	90,061,000	51.7	48,774,000	32.4	44,251,000	53.6
Rateable Value: Office (£)	6,835,000	3.9	27,774,000	18.4	17,367,000	21.0
Rateable Value: Industrial (£)	25,310,000	14.5	36,356,000	24.1	9,967,000	12.1
Rateable Value: Warehouse (£)	48,802,000	28.0	36,141,000	24.0	9,176,000	11.1
Rateable Value: Other (£)	3,121,000	1.8	1,567,000	1.0	1,862,000	2.3

Source: Valuation Office 2005

Table A2(d): Rateable Value per m2

Rateable Value per m2	Thurrock	Basildon	Southend-on-Sea
Total Rateable Value (£)	86	73	68
Rateable Value: Retail (£)	216	138	104
Rateable Value: Office (£)	80	122	71
Rateable Value: Industrial (£)	42	45	36
Rateable Value: Warehouse (£)	57	58	40
Rateable Value: Other (£)	47	39	41

Source: Valuation Office 2005

Appendix 3: Future Demand and Supply - Tables

Table A3(a): Baseline Forecast – Demography

	2009	2014	2021	2031
Total Population	152,500	159,300	167,500	177,700
Working Age Population	97,100	100,400	104,100	107,000
Residence Employment	70,900	73,700	77,900	83,300
Total Employment (Jobs)	63,400	66,600	70,700	76,400

Source: EERA 2009 / Oxford Economics
Figures Rounded

Table A3(b): Faster Economic Recovery Scenario Forecast – Demography

	2009	2014	2021	2031
Total Population	152,500	159,300	167,700	177,900
Working Age Population	97,100	100,500	104,200	107,200
Residence Employment	70,900	74,000	78,200	83,600
Total Employment (Jobs)	63,400	66,900	70,900	76,600

Source: EERA 2009 / Oxford Economics
Figures Rounded

Table A3(c): Severe Recession Scenario Forecast – Demography

	2009	2014	2021	2031
Total Population	152,500	158,800	166,400	175,900
Working Age Population	97,100	100,000	103,300	105,800
Residence Employment	70,600	72,400	76,700	81,800
Total Employment (Jobs)	63,200	65,300	69,600	75,200

Source: EERA 2009 / Oxford Economics
Figures Rounded

Table A3(d): RSS Scenario GVA Unconstrained – Demography

	2009	2014	2021	2031
Total Population	152,500	159,500	167,900	178,300
Working Age Population	97,100	100,600	104,600	108,100
Residence Employment	71,000	74,100	78,600	84,200
Total Employment (Jobs)	63,600	67,000	71,400	77,400

Source: EERA 2009 / Oxford Economics
Figures Rounded

Table A3(e): RSS Continuation Scenario Local Forecasts – Demography

	2009	2014	2021	2031
Total Population	152,900	161,100	171,800	186,300
Working Age Population	97,400	101,700	107,200	113,100
Residence Employment	70,900	74,000	78,700	85,100
Total Employment (Jobs)	63,400	67,000	71,900	79,200

Source: EERA 2009 / Oxford Economics

Figures Rounded

Appendix A3(f): Table Baseline Forecast – Employment Change by Sector 2001 to 2031

	2001	2009	2021	2031	2001 to 2021	2009 to 2021	2009 to 2031
Agriculture	110	160	130	110	20	-30	-50
Extraction	70	10	5	0	-65	-5	-10
Manufacturing	1,610	1,050	710	500	-900	-340	-550
Electricity, gas & water	160	560	800	950	640	240	390
Construction	3,890	2,530	3,300	3,950	-590	770	1,420
Distribution	3,890	6,060	6,320	6,590	2,170	260	530
Retail	12,860	12,400	13,450	14,280	590	1,050	1,880
Hotels & restaurants	4,140	3,380	3,380	3,280	-760	0	100
Transport & communications	6,770	7,840	9,710	11,030	2,940	1,870	3,190
Financial intermediation	560	430	500	580	-60	70	150
Business services	3,880	5,640	6,410	6,550	2,530	770	910
Public administration & defence	1,400	1,040	1,700	2,280	300	660	1,240
Education	3,620	5,270	5,460	5,530	1,840	190	260
Health	3,580	3,450	5,300	7,140	1,720	1,850	3,690
Other personal services	2,070	2,400	2,330	2,310	260	-70	-90
Total	54,100	55,700	62,100	67,000	8,000	6,400	11,300

Source: EERA 2009 / Oxford Economics

Figures Rounded

Table A3(g): Baseline Forecast – Percentage Employment Change by Sector 2009 to 2031

	2009 to 2014	2015 to 2021		2022 to 2031	2009 to 2031
Agriculture	-7.4	-8.3	-16.0	-13.1	-28.1
Extraction	-56.2	-69.5	-88.8	Stated that industry is no longer present in Thurrock	Stated that industry is no longer present in Thurrock
Manufacturing of Food, drink & tobacco	-9.9	-10.7	-21.4	-19.9	-37.8
Manufacturing of Other low tech	-18.8	-19.0	-37.1	-26.3	-54.5
Manufacturing of Metals & engineering	-11.3	-9.5	-21.7	-15.3	-33.8
Manufacturing of Chemicals & process industries	-14.6	-16.7	-31.4	-25.4	-49.7
Manufacturing of Other and recycling	-15.3	-21.1	-35.9	-33.5	-58.7
Electricity, gas & water	20.0	15.6	41.8	16.9	70.6
Construction	14.6	11.1	28.5	17.5	55.7
Distribution	2.3	1.6	2.7	3.9	8.7
Retail	3.1	4.2	6.9	5.7	15.2
Hotels & restaurants	0.5	-0.9	-1.4	-2.7	-3.1
Transport & communications	12.2	8.4	22.1	12.2	40.6
Financial intermediation	3.9	9.6	14.8	14.5	35.4
Business services	6.7	3.0	12.2	2.8	16.2
Public administration & defence	25.6	24.9	63.2	29.5	119.7
Education	1.5	1.6	3.1	1.1	5.0
Health	20.3	23.2	53.1	30.5	107.3
Other personal services	0.4	-2.9	-3.8	-0.5	-3.5
Total	4.9	4.7	10.0	7.3	20.2

Source: EERA 2009 / Oxford Economics
 Figures Rounded

Table A3(h): Severe Recession Scenario Forecast – Employment Change by Sector 2001 to 2031

	2001	2009	2021	2031	2001 to 2021	2009 to 2021	2009 to 2031
Health	3,580	3,450	5,280	7,090	1,700	1,830	3,640
Transport & communications	6,770	7,800	9,520	10,810	2,750	1,720	3,010
Retail	12,860	12,340	13,190	14,000	330	850	1,660
Construction	3,890	2,520	3,240	3,870	-650	720	1,350
Business services	3,880	5,610	6,300	6,440	2,420	690	830
Public administration & defence	1,400	1,040	1,700	2,260	300	660	1,220
Education	3,620	5,270	5,430	5,490	1,810	160	220
Distribution	3,890	6,030	6,170	6,460	2,280	140	430
Other personal services	2,070	2,380	2,290	2,270	220	90	-110
Financial intermediation	560	430	490	570	-70	30	140
Extraction	70	10	5	0	-65	-5	-10
Agriculture	110	160	130	110	20	-30	-50
Hotels & restaurants	4,140	3,370	3,320	3,210	-820	-50	-160
Manufacturing	1,610	1,050	700	500	-910	-350	-550
Total	54,120	55,520	61,080	65,890	6,960	5,560	10,370

Source: EERA 2009 / Oxford Economics
 Figures Rounded

Table A3(i): Severe Recession Scenario Forecast – Percentage Employment Change by Sector 2009 to 2031

	2009 to 2014	2015 to 2021	2022 to 2031	2009 to 2031
Agriculture	-7.4	-8.3	-13.1	8.0
Extraction	-56.2	-69.5	Stated that industry is no longer present in Thurrock	Stated that industry is no longer present in Thurrock
Manufacturing of Food, drink & tobacco	-11.4	-10.4	-20.1	-50.5
Manufacturing of Other low tech	-20.3	-18.7	-26.6	-69.7
Manufacturing of Metals & engineering	-13.1	-9.2	-15.7	-77.8
Manufacturing of Chemicals & process industries	-16.1	-16.4	-25.6	-61.4
Manufacturing of Other and recycling	-16.7	-20.7	-33.6	-74.5
Electricity, gas & water	18.4	16.2	17.0	475.3
Construction	12.6	11.6	17.5	-0.6
Distribution	0.5	2.0	3.8	66.1
Retail	1.4	4.4	5.6	8.8
Hotels & restaurants	-1.1	-0.7	-2.8	-22.4
Transport & communications	10.1	8.8	12.2	59.6
Financial intermediation	1.6	10.2	14.6	1.9
Business services	4.9	3.3	2.8	66.1
Public administration & defence	25.3	24.7	29.3	61.5
Education	1.3	1.4	0.9	51.7
Health	20.0	22.9	30.1	98.0
Other personal services	-1.2	-2.6	-0.6	9.6
Total	3.4	4.9	7.3	21.7

Source: EERA 2009 / Oxford Economics

Figures Rounded

Table A3(j): Faster Economic Recovery Scenario Forecast – Percentage Employment Change by Sector 2009 to 2031

	2009 to 2014	2015 to 2021	2022 to 2031	2009 to 2031
Agriculture	-7.4	-8.3	-13.1	-28.1
Extraction	-56.2	-69.5	Stated that industry is no longer present in Thurrock	Stated that industry is no longer present in Thurrock
Manufacturing of Food, drink & tobacco	-9.5	-10.9	-19.9	-37.6
Manufacturing of Other low tech	-18.3	-19.1	-26.2	-54.4
Manufacturing of Metals & engineering	-10.9	-9.6	-15.2	-33.5
Manufacturing of Chemicals & process industries	-14.2	-16.8	-25.3	-49.5
Manufacturing of Other and recycling	-15.0	-21.2	-33.5	-58.6
Electricity, gas & water	20.5	15.5	16.9	70.9
Construction	15.2	11.0	17.5	56.2
Distribution	2.9	1.5	3.8	9.0
Retail	3.6	4.0	5.7	15.5
Hotels & restaurants	1.0	-1.0	-2.7	-2.8
Transport & communications	12.8	8.2	12.2	41.1
Financial intermediation	4.5	9.4	14.4	35.8
Business services	7.2	2.9	2.7	16.4
Public administration & defence	25.6	25.0	29.5	119.8
Education	1.5	1.6	1.1	5.0
Health	20.3	23.2	30.5	107.5
Other personal services	0.8	-3.0	-0.5	-3.3
Total	5.4	4.6	7.3	20.5

Source: EERA 2009 / Oxford Economics
 Figures Rounded

Table A3(k): RSS Continuation – Employment Change by Sector 2009 to 2031

	2001	2009	2021	2031	2001 to 2021	2009 to 2021	2009 to 2031
Agriculture	110	160	130	110	20	-30	-50
Extraction	70	10	5	0	-65	-5	-10
Manufacturing	7,130	4,600	3,280	2,440	-3,850	-1,320	-2,220
Electricity, gas & water	160	560	800	950	640	240	390
Construction	3,900	2,530	3,360	4,100	-540	830	1,570
Distribution	3,890	6,060	6,400	6,790	2,510	340	730
Retail	12,860	12,410	13,740	14,900	880	1,330	2,490
Hotels & restaurants	4,140	3,380	3,460	3,440	-680	80	-60
Transport & communications	6,770	7,840	9,830	11,310	3,060	1,990	3,470
Financial intermediation	560	430	510	600	-50	80	170
Business services	3,880	5,640	6,500	6,740	2,620	860	1,100
Public administration & defence	1,400	1,040	1,740	2,380	340	700	1,340
Education	3,620	5,270	5,590	5,780	1,650	320	510
Health	3,580	3,450	5,420	7,480	1,840	1,970	4,030
Other personal services	2,070	2,400	2,380	2,410	310	-20	10
Total	54,120	55,780	63,120	69,400	9,000	7,340	13,620

Source: EERA 2009 / Oxford Economics
 Figures Rounded

Appendix 4: Demand and Supply Analysis

Methodology: Table 10 and 11

1. Demand - Section 6 of this employment land review sets out the forecast demand for employment land in Thurrock.

Row A. Job Growth 2001 to 2009 – Job growth change from the base date of the calculation – assumed here to be 31 March 2009. Job change taken from the East of England Forecasting Model to provide statistical consistency with the regions analysis.

Row B. Projected demand 2009 to 2021 – Projected job growth from the East of England Forecasting Model to ensure consistency of data calculation across the lifetime of the plan period. The ‘East of England: Employment Land Review Guidance Manual’ states that the projections should be based on the regional forecasts. The East of England Regional Assembly has published two sets of projections. The first set of data informs Policy E1 of the East of England Plan; and the second informs the East of England Plan Review to 2031. The latter provides the more detailed and up to date projection information source.

Row C. The London Gateway is a committed project that will deliver a new port facility with associated works.

Row D. West Thurrock / Lakeside Basin is a policy intervention for the expansion of Lakeside and development to form a regional centre. This is set out in the Panel Report of the Lakeside Basin Single Issue Review 2009 and the subsequent recommendation of the Secretary of State, January 2010.

Row E. Residual relates to the remaining job growth that has not been accounted for. This will require intervention and a new policy stance to bring forward.

Row F. Sets out the total jobs growth demand and equals the requirement set out in the East of England Plan.

2. Supply – Sections 5 and 6 of this employment land review set out and assess the supply of employment land in Thurrock.

Row G. Completed Floorspace 2001 to 2009 – the completed floorspace relates to planning permissions that have implemented since April 1st 2001.

Row H. Outstanding net increase in employment floorspace i.e. site with planning permission but have not yet been implemented.

Row I. New sites identified in the Site Allocations: Preferred Options DPD. Employment capacity tested by Tribal 2010.

Row J. New sites identified in the Site Allocations: Preferred Options DPD. Employment capacity tested by Tribal 2010.

Row K.	New sites identified in the Site Allocations: Preferred Options DPD. Employment capacity tested by Tribal 2010.
Row L.	New sites identified in the Site Allocations: Preferred Options DPD. Employment capacity tested by Tribal 2010.
Row M.	Anticipated job growth arising from the development of the port facility and associated works at London Gateway.
Row N.	West Thurrock / Lakeside Basin is a policy intervention for the expansion of Lakeside and development to form a regional centre. This is set out in the Panel Report of the Lakeside Basin Single Issue Review 2009 and the subsequent recommendation of the Secretary of State, January 2010. Employment capacity tested by Tribal 2010.
Row O.	Lakeside Intensification figures, tested by Tribal 2010.
Row P	Based on an assessment of home-working in Thurrock. ONS / Census 2001 data used.
Row Q.	Existing employment sites identified as being potential housing sites in the SHLAA (2010). The re-designation of these sites will result in a loss of existing employment floorspace.
Row R.	Vacant land on existing employment sites identified as being potential housing sites in the SHLAA (2010). The re-designation of this vacant land will result in a loss of potential employment floorspace.
Row S	Total supply of new jobs from employment land
3.	The balance between the demand and supply of employment land in Thurrock.
Row T	Potential Class B employment from vacant land identified on existing employment sites.
Row U	Potential Class B employment from existing vacant floorspace.
Row V	Sub total of T and U
4.	Revised balance between the demand and supply of employment land in Thurrock.

Appendix 5: Employment Land Audit – Tables

Table A5(a): Estimated Floorspace: Primary Industrial and Commercial Employment Land

Ref	Site	Estimated Floorspace (m ²)	Estimated Total Employment Capacity		Estimated Vacant Floorspace (m ²)	Potential Employment from vacant floorspace	
			Min	Max		Min	Max
E1a	Purfleet Industrial Park, Aveley	688,844	1,210	1,675	17,921	370	515
E1b	Botany Quarry / Tank Lane, Purfleet	26,775	665	665	4,197	95	140
E1c	Former BPB, London Road, Purfleet	22,000	690	690	22,000	690	690
E1d	Dolphin Estate / Lafarge, West Thurrock	169,337	2,905	4,005	10,851	135	230
E1e	London Road, Purfleet	37,350	1,200	1,200	0	0	0
E1f	West Thurrock Marshes	219,900	4,500	5,550	11,293	130	165
E1g	Lakeside / Waterglade Industrial Estates, West Thurrock	216,897	3,765	5,015	42,985	440	930
E1h	Thurrock Park, Little Thurrock	53,100	700	1,025	3,050	60	60
E1i	Tilbury South	28,850	530	910	792	45	45
Total		1,463,053	16,165	20,730	113,089	1,965	2,775

Source: Thurrock Borough Council 2009

Figures Rounded

Table A5(b): Estimated Floorspace: Secondary Industrial and Commercial Employment Land

Ref	Site	Estimated Floorspace (m ²)	Estimated Total Employment Capacity		Estimated Vacant Floorspace (m ²)	Potential Employment from vacant floorspace	
			Min	Max		Min	Max
E3a	Milehams Industrial Estate, Purfleet	4,457	140	140	0	0	0
E3b	Marley Works, South Ockendon	7465	230	230	0	0	0
E3c	Aveley Industrial Estate, South Ockendon	16,000	180	180	0	0	0
E3d	Chafford Hundred North West Zone	600	35	35	0	0	0
E3e	434 – 436 London Road, West Thurrock	29,183	490	680	2,990	35	60
E3f	Grays South – Manor Way	6,335	165	165	0	0	0
E3g	Globe Works, Grays	28,462	780	780	1680	50	50
E3h	Bata / Thames Industrial Park, East Tilbury	51,693	575	1,025	16,950	300	300
E3i	Durox Works, Linford	20,288	634	634	0	0	0
E3j	Stanhope Industrial Park, Stanford-Le-Hope	3,629	113	113	0	0	0
Total		168,112	3,342	3,982	21,620	385	410

Source: Thurrock Borough Council 2009
 Figures Rounded

Table A5(c): Net Permitted Employment Floorspace since 2001: Primary Industrial and Commercial Employment Land

Site	Ref	Total Net floorspace	Office	Industrial	Warehouse	Other
Purfleet Industrial Park, Aveley	E1a	3,341	1,659	2,661	-986	7
Botany Quarry / Tank Lane, Purfleet	E1b	2,227	156	2,071	0	0
Former BPB, London Road, Purfleet	E1c	0	0	0	0	(153 Dwellings and 1,500m ² Retail Space)
Dolphin Estate / Lafarge, West Thurrock	E1d	73,774	5,075	2,567	65,016	1,116
London Road, Purfleet	E1e	15,080	2,985	10,110	4,143	-2,158
West Thurrock Marshes	E1f	48,760	2,254	-9,934	39,362	17,078
Lakeside / Waterglade Industrial Estates, West Thurrock	E1g	64,878	2,457	16,209	40,208	6,004
Thurrock Park, Little Thurrock	E1h	16,287	792	773	14,612	110
Tilbury South	E1i	2,724	50	2,674	0	0
Total		227,071	15,428	27,131	162,355	22,157

Source: Thurrock Borough Council 2009

Table A5(d): Net Permitted Employment Floorspace since 2001: Secondary Industrial and Commercial Employment Land

Site	Ref	Total Net floorspace	Office	Industrial	Warehouse	Other
Milehams Industrial Estate, Purfleet	E3a	0	0	0	0	0
Marley Works, South Ockendon	E3b	0	0	0	0	0
Aveley Industrial Estate, South Ockendon	E3c	0	0	0	0	0
Chafford Hundred North West Zone	E3d	600	600	0	0	0
434 – 436 London Road, West Thurrock	E3e	10,712	358	3,552	6,802	0
Grays South – Manor Way	E3f	68	0	0	68	0
Globe Works	E3g	0	0	0	0	0
Bata / Thames Industrial Park, East Tilbury	E3h	4,466	-168	4,756	-20	-102
Durox Works, Linford	E3i	80	0	80	0	0
Stanhope Industrial Park, Stanford-Le-Hope	E3j	36,465	560	35,905	0	0
Total		52,391	1350	44,293	6,850	-102

Source: Thurrock Borough Council 2009

Table A5(e): Completed Employment Floorspace since 2001: Primary Industrial and Commercial Employment Land

Site	Ref	Total Net floorspace	Office	Industrial	Warehouse	Other
Purfleet Industrial Park, Aveley	E1a	3,341	1,659	2,661	-986	7
Botany Quarry / Tank Lane, Purfleet	E1b	1,913	156	1,757	0	0
Former BPB, London Road, Purfleet	E1c	0	0	0	0	0
Dolphin Estate / Lafarge, West Thurrock	E1d	73,124	4,602	2,567	65,016	939
London Road, Purfleet	E1e	15,080	2,985	10,110	4,143	-2,158
West Thurrock Marshes	E1f	44,181	968	-12,096	54,877	432
Lakeside / Waterglade Industrial Estates, West Thurrock	E1g	16,996	352	2,761	12,183	1,700
Thurrock Park, Little Thurrock	E1h	11,777	599	0	11,068	110
Tilbury South	E1i	2,724	50	2,674	0	0
Total		169,136	11,371	10,434	146,301	1030

Source: Thurrock Borough Council 2009

Table A5(f): Completed Employment Floorspace since 2001: Secondary Industrial and Commercial Employment Land

Site	Ref	Total Net floorspace	Office	Industrial	Warehouse	Other
Milehams Industrial Estate, Purfleet	E3a	0	0	0	0	0
Marley Works	E3b	1100	0	1100	0	0
Aveley Industrial Estate, South Ockendon	E3c	0	0	0	0	0
Chafford Hundred North West Zone	E3d	600	600	0	0	0
434 – 436 London Road, West Thurrock	E3e	7,362	0	3,552	3,810	0
Grays South – Manor Way	E3f	68	0	0	68	0
Globe Works	E3g	0	0	0	0	0
Bata / Thames Industrial Park, East Tilbury	E3h	0	0	0	0	0
Durox Works, Linford	E3i	80	0	80	0	0
Stanhope Industrial Park, Stanford-Le-Hope	E3j	640	560	80	0	0
Total		9,850	1,160	4,812	3,878	0

Source: Thurrock Borough Council 2009

Table A5(g): Estimated Total Employment Capacity at Existing Employment Sites proposed for re-designation in the LDF (existing floorspace capacity + vacant land)

Site	Estimated Employment Capacity (Existing floorspace)	Estimated Employment Capacity (Vacant land)
Proposed for Re-designation at Preferred Options Stage		
Askew Farm Site ⁷	50	0
Aveley Industrial Estate (Southern part of the site), Arisdale Avenue, South Ockendon	1735	90
Baryta Close/Victoria Road, Stanford-Le-Hope	175	0
Former BPB (Thames Board Mills) Site, Purfleet (West side of site)	1420	100
Former Coal Yard Site, Purfleet	0	780
Coward Bros and Star Industrial Estate, St John's Road, Chadwell St Mary	300	0
Gumley Road, South Stifford	555	0
Sandy Lane Pit and Merrydale Works, Chadwell St Mary	95	0
School Field Road, West Thurrock	100	0
South of London Road & Lyndale Estate, West Thurrock	130	105
Titan Pit, Grays	455	460
Wouldham Works ('Fiddler's Reach'), South Stifford	0	1975
Proposed for Re-designation post-Preferred Options Stage⁸		
Botany Quarry (southern part of Site E1b)	465	440
Globe Works	780	0
Marley Works	230	0
Subtotal	6,490	3,950
Total employment capacity lost through re-designation to housing over the lifetime of the plan	10,570	

Source: Thurrock Borough Council 2010

Figures Rounded

⁷ Askew Farm has been included here for completeness, as a site currently in employment use. Note, however, that Askew Farm is not a designated Primary or Secondary Industrial or Commercial site.

⁸ Bata/Thames Industrial Park has not been included in this calculation because it will remain partly in a Secondary Employment use under a mixed use scheme.

Table A5(h): Estimated Floorspace at Proposed Employment Sites and Potential Employment Capacity (Tribal 2010)

Tribal considered 57 sites in their *Employment Sites Review* (2010)

These sites included:

- New Primary Employment Land
- New Secondary Employment land
- Mixed Use
- Lakeside Intensification
- Other Lakeside
- Proposed Other

Site Source	Total developable area (ha)	Total floorspace (sq m) (low)	Total floorspace (sq m) (high)	Total jobs (low)	Total jobs (high)
New Primary	372.7	339,507	395,763	19,934	22,779
New Secondary	7.9	35,699	35,699	860	1,419
Mixed Use	75.4	67,603	86,664	1,834	2325
Lakeside Intensification	19.6	71,523	85,501	4,041	4,866
Proposed Other	81.3	62,500	58,500	850	861
Total	556.9	576,832	662,127	27,519	35,250

Appendix 6: Employment Land Audit – Site Schedules for sites identified in the LDF as employment land

Purfleet Industrial Park, Aveley

Site Reference	LDF: E1a URS: Cluster Number 1
LDF Site Designation	Primary Industrial and Commercial Employment Land
Site Area (ha)	26.47
Site Location	<p>Purfleet Industrial Park is located to the north-west of Purfleet and to the west of Aveley. The site adjoins the southern boundary of London Road (A1306). The northern part of the site adjoins the junction between the A13 and London Road. The southern boundary of the site adjoins the Channel Tunnel Railway Line.</p> <p>The site is generally located away from existing residential areas with the exception of those dwellings located along Purfleet Road.</p> <p>Rainham Marshes is located to the south of the site. The site adjoins the Inner Thames Marshes SSSI.</p> <p>There are no topography issues at this site.</p>
Condition of Buildings	The condition of the buildings is generally good with only a small number in need of upgrading and renewal.
Accessibility	<p>There are two main access points into Purfleet Industrial Park. The northern part of the site is accessed from London Road (A1306). The southern part of the site is accessed from New Tank Hill Road (A1090). The site has secured access.</p> <p>The site is located 1.2 miles from Purfleet Train Station. The site is located 0.6 miles from the closest bus stop on New Tank Hill Road.</p>
Business Type	The site used as a warehouse and distribution park. There are also a number of recycling and environmental industrial uses.
Total Rateable Value (£)	£3,197,000
Rateable Value per m² (£)	£48.62
Estimated Floorspace (m²)	<p>Total Floorspace – 68,844m²</p> <p>Class B1 (Business) – 4,535m²</p> <p>Class B2 (General Industry) – 12,401m²</p> <p>Class B8 (Warehouse and Distribution) – 51,908m²</p>
Estimated Employment Capacity	<p>1,210 to 1,675</p> <p>Class B1 (Business) – 250</p> <p>Class B2 (General Industry) – 385</p> <p>Class B8 (Warehouse and Distribution) 575 to 1,040</p>

Total Number of Rateable Units	84
Building Coverage	25% - There is opportunity of intensification of existing units at this site.
Vacancy: Floorspace (m²)	Total Vacant Floorspace – 17,921m ² Class B1 (Business) – 0 Class B2 (General Industry) – 0 Class B8 (Warehouse and Distribution) – 0m ² Composite Class B2/B8 – 17,921m ²
Potential Employment from Vacant Floorspace	370 to 515 Composite Class B2/B8 – 370 to 515
Vacancy: Units	5
Vacancy: Land (ha)	0.81
Potential Class B Employment from Vacant Land	65
Proposed New Employment Sites within site boundary	E2a: Two sites at Purfleet Industrial Park
Proposed New Employment Sites adjacent to site boundary	None
Proposed New Employment Sites: Land (Ha)	1.56
Proposed New Employment Sites: Potential Floorspace (m²)	5477 m ²
Proposed New Employment Sites: Potential Employment	157
Planning Constraints	Overhead Lines Flood Zone 2 & 3 Tree Preservation Order
Other Constraints	The presence of the Channel Tunnel Railway Line will constrain future redevelopments, particularly with regard to height.
Planning Permissions since 2001	<p>In total, 10 planning applications that sought to increase the net employment floorspace at Purfleet Industrial Park have been permitted since 2001.</p> <p>The net increase of floorspace comprised: 2,661m² of industrial floorspace; 1,659m² of office floorspace; and 7m² of other. The permitted applications allowed for a loss of 986m² of warehouse floorspace.</p> <p>These applications sought improvement works and extensions to existing industrial and commercial units.</p> <p>The permitted net floorspace increased the</p>

	employment capacity of Purfleet Industrial Park by approximately 150 people.
Notes	N/A
Recommendation	<ol style="list-style-type: none"> 1. Retain existing Primary Industrial and Commercial areas 2. Retain the designation of proposed new Primary and Industrial sites, labelled E2a.

Botany Quarry / Tank Lane, Purfleet

Site Reference	LDF: E1b URS: Cluster 2
LDF Site Designation	Primary Industrial and Commercial Employment Land
Site Area (ha)	29.96
Site Location	<p>The Botany Quarry / Tank Lane Site is located in the central part of Purfleet. The north of the site adjoins the Purfleet By-Pass and the Channel Tunnel railway line. The site is located to the north of an established residential area with the Southend-on-Sea to London Fenchurch railway line adjoining the site to the west.</p> <p>The site is located within a former Purfleet Quarry Pit and is partially covered by an SSSI.</p> <p>There are no topography issues at this site.</p>
Condition of Buildings	The conditions of the buildings are varied with approximately 50% of buildings in poor condition.
Accessibility	<p>The site is accessed from Botany Way which has two access points from the main road network. The northern part of the site is accessed from a roundabout junction with the Purfleet By-Pass and Arterial Road Purfleet. The southern part of the site is accessed from the Botany Way junction with London Road.</p> <p>The site is located 0.4 miles from Purfleet Train Station. The site is located 0.4 miles from the closest bus stop on London Road.</p>
Business Type	This site is generally used for storage with several extensive low density open storage sites. The northern part of site contains modern warehousing units. On the western side of the site is an extensive area of vacant land, while minerals and waste recycling activities occur at the south of the site.
Total Rateable Value (£)	£445,075
Rateable Value per m² (£)	£19.35
Estimated Floorspace (m²)	<p>Total Floorspace – 26,775m²</p> <p>Class B1 (Business) – 1,000m²</p> <p>Class B2 (General Industry) – 8415m²</p> <p>Class B8 (Warehouse and Distribution) – 17,360m²</p>
Estimated Employment Capacity	<p>665</p> <p>Class B1 (Business) – 55</p> <p>Class B2 (General Industry) – 265</p> <p>Class B8 (Warehouse and Distribution) – 345</p>

Total Number of Rateable Units	34
Building Coverage	26.5%
Vacancy: Floorspace (m²)	Total Vacant Floorspace – 4,197m ² Class B1 (Business) – 302m ² Composite Class B2/B8 – 3,895m ²
Potential Employment from Vacant Floorspace	Total Employment – 95 to 140 Class B1 (Business) – 20 Composite Class B2/B8 – 75 to 120
Vacancy: Units	3
Vacancy: Land (ha)	5.51
Potential Class B Employment from Vacant Land	440 (lost, however, to housing under the SHLAA and Purfleet Master Plan)
Proposed New Employment Sites within site boundary	E2b: Site located between Channel Tunnel rail line and Botany Way.
Proposed New Employment Sites adjacent to site boundary	None
Proposed New Employment Sites: Land (Ha)	0.6
Proposed New Employment Sites: Potential Floorspace (m²)	2,258m ²
Proposed New Employment Sites: Potential Employment	57
Planning Constraints	Flood Zone 2 & 3 SSSI Tree Preservation Order
Planning Permissions since 2001	<p>In total, 3 planning applications for increased employment floorspace at Botany Quarry / Tank Lane Site have been permitted since 2001.</p> <p>These applications amounted to an increase of 2,227m² of employment floorspace with 2,071m² of this space being of industrial use, and 156m² being for office space.</p> <p>These applications sought improvement works and extensions to existing industrial and commercial units.</p> <p>In total, the increased floorspace at Botany Quarry / Tank Lane would increase the employment capacity by 70 people.</p>

Notes	The southern part of this site is now designated for housing in the LDF, following the analysis undertaken in the development of the SHLAA. It is also designated for housing in the TTGDC Purfleet Centre Development Framework.
Recommendation	<ol style="list-style-type: none"> 1. Retain existing Primary Industrial and Commercial area north of Tank Lane. 2. Amend the southern boundary of the site, re-designating the existing Primary Industrial and Commercial area south of Tank Lane as a housing site to allow the development of a residential-led mixed community forming part of 'Purfleet Pride'. 3. Retain the designation of proposed new Primary Industrial and Commercial site (labelled E2b).

Former BPB (Thames Board Mills), London Road, Purfleet (east side of site)

Site Reference	LDF: E1c URS: Cluster 3
LDF Site Designation	Primary Industrial and Commercial Employment Land
Site Area (ha)	1.23
Site Location & Description	<p>The Former BPB Site on London Road is located to the south of an established residential area and is adjacent industrial and commercial uses to the east and west. An oil refinery is located to the south east of the site. The southern boundary of the site adjoins the Southend-on-Sea to London Fenchurch railway line.</p> <p>There are no topography issues at this site.</p>
Condition of Buildings	The condition of the buildings is generally good although approximately 20% of buildings are in poor condition.
Accessibility	<p>The Site only has one access point which is from Mill Road which is located off London Road. The site has secured access.</p> <p>The site is located 0.6 miles from Purfleet Train Station. The site is located 0.2 miles from the closest bus stop on London Road.</p>
Business Types	The site is currently vacant but was formerly occupied by BPB Paperboard who manufactured construction products at this site.
Total Rateable Value (£)	n/a (Removed from rating list in 2007. The Site had a value of £160,000 in 2005)
Rateable Value per m² (£)	n/a
Estimated Floorspace (m²)	Total Floorspace – 22,000m ² Class B1 (Business) – 0 Class B2 (General Industry) – 22,000m ² Class B8 (Warehouse and Distribution) – 0
Estimated Employment Capacity	690 Class B1 (Business) – 0 Class B2 (General Industry) – 690 Class B8 (Warehouse and Distribution) – 0
Total Number of Rateable Units	1
Building Coverage (%)	100%
Vacancy: Floorspace (m²)	Total Vacant Floorspace – 22,000m ²

Potential Employment from Vacant Floorspace	Total Employment – 690
Vacancy: Units	0
Vacancy: Land (ha)	1.23
Potential Class B Employment from Vacant Land	690
Proposed New Employment Sites within site boundary	None
Proposed New Employment Sites adjacent to site boundary	None
Proposed New Employment Sites: Land (Ha)	N/A
Proposed New Employment Sites: Potential Floorspace (m²)	N/A
Proposed New Employment Sites: Potential Employment	N/A
Planning Constraints	Flood Zone 2 & 3 Major Hazard Sites (COMAH)
Planning Permissions since 2001	An outline planning permission was granted in 2005 for the redevelopment of the site and surrounding area for a mix of uses including residential, community uses, retail and employment uses.
Notes	The larger west side of the site is designated for housing in the LDF (see separate assessment in Appendix 7)
Recommendation	<ol style="list-style-type: none"> 1. Retain existing Primary Industrial and Commercial area. 2. Expand the Primary Industrial and Commercial area to include the part of the wider BPB site bounded by London Road and Mill Road.

Dolphin Estate / Lafarge, West Thurrock

Site Reference	LDF: E1d URS: Cluster 7
LDF Site Designation	Primary Industrial and Commercial Employment Land
Site Area	61.93
Site Location & Description	<p>The Dolphin Estate / Lafarge site adjoins the M25 on the site's eastern boundary. The site extends to the west and adjoins the established residential areas in Purfleet to the west. The southern part of the site bounds the Purfleet By-Pass.</p> <p>The site is located adjacent to the Purfleet Chalk Pits SSSI and the Bluelands West Quarry/Lake. This lake is proposed for designation in the LDF as a Primary employment site (E2e) and was assessed as such by Tribal, in the <i>Employment Sites Review</i> (2010). The site has been identified as a potential employment site since the Thurrock Local Plan was published in 1997.</p>
Condition of Buildings	The condition of the buildings at this site is very good with several new developments.
Accessibility	<p>The site has three main access points. The northern access point is made from Junction 31 of the M25. The two southern access points are both from the Purfleet by-Pass. The more western of these two access points is on a roundabout junction with London Road, Purfleet and Stonehouse Lane which provides linkages through out the Site.</p> <p>The site is located 1.1 miles from Purfleet Train Station. The site is located 0.3 miles from the closest bus stop on London Road.</p>
Business Types	<p>This contains several large new developments that provide space for strategic warehouse operations including a regional distribution centre for Tesco, Harveys and James Latham a distributor of wood based products.</p> <p>Kerneos is located at this site. This company manufactures calcium aluminate, cement and finished products.</p> <p>The TTGDC's offices are also located at this site.</p>
Total Rate Value (£)	£9,875,575
Rateable Value per m² (£)	£61.86

Estimated Floorspace (m²)	Total Floorspace – 169,337m ² Class B1 (Business) – 6,943m ² Class B2 (General Industry) – 32,721m ² Class B8 (Warehouse and Distribution) – 123,798m ² Other (Hotel) – 5,875m ²
Estimated Employment Capacity	2,905 to 4,005 Class B1 (Business) – 385 Class B2 (General Industry) – 1,025 Class B8 (Warehouse and Distribution) – 1,375 to 2,475 Other – 120
Total Number of Rateable Units	27
Building Coverage (%)	25.7%
Vacancy: Floorspace (m²)	Total Vacant Floorspace – 10,851m ² Class B1 (Business) – 365m ² Class B2 (General Industry) – 0 Class B8 (Warehouse and Distribution) – 10,486m ² Composite Class B2/B8 – 0
Potential Employment from Vacant Floorspace	Total Employment – 135 to 230 Class B1 (Business) – 20 Class B2 (General Industry) – 115 to 210 Class B8 (Warehouse and Distribution) – 0 Composite Class B2/B8 – 0
Vacancy: Units	3
Vacancy: Land (ha)	2.18
Potential Class B Employment from Vacant Land	110
Proposed New Employment Sites within site boundary	None
Proposed New Employment Sites adjacent to site boundary	E2e: Bluelands West (Quarry/Lake)
Proposed New Employment Sites: Land (Ha)	6.28
Proposed New Employment Sites: Potential Floorspace	37,078 m ²
Proposed New Employment Sites: Potential Employment	589-701
Planning Constraints	Landfill Site Flood Zone 2 & 3 SSSI Tree Preservation Order

<p>Planning Permissions since 2001</p>	<p>In total there were 16 planning applications permitted since 2001 that sought an increase in the level of employment floorspace.</p> <p>These applications amounted to an increase of the floorspace by 73,124m². This is made up of 65,016m² of warehouse floorspace, 4,602m² of office floorspace, 2,567m² of industrial floorspace and 939m² of other floorspace.</p> <p>The applications were predominantly for the improvement works and extension to existing units. There were 6 applications that sought to significantly increase the amount of floorspace by introducing new units into the Dolphin Estate / Lafarge site.</p> <p>The increase in floorspace permitted amounted to an increase in the employment capacity at this site of between 1,110 and 1,690 people.</p>
<p>Notes</p>	<p>N/A</p>
<p>Recommendation</p>	<ol style="list-style-type: none"> 1. Retain existing Primary Industrial and Commercial area. 2. Designate the vacant sites identified as New Primary Industrial and Commercial areas. 3. Include site E2e: Bluelands West (Quarry/Lake) within the site boundary.

London Road, Purfleet

Site Reference	LDF: E1e URS: Cluster 6
LDF Site Designation	Primary Industrial and Commercial Employment Land
Site Area (ha)	70.14
Site Location & Description	<p>The London Road Site adjoins the M25 on the site's eastern boundary. The site extends to the west and adjoins the oil refinery and established industrial and commercial areas in Purfleet to the west. The southern part of the site is bounded by the River Thames, whilst the northern part of the site is bounded by London Road, Purfleet.</p> <p>Most of the site was previously known as 'Van den Bergh's' land.</p> <p>The Channel Tunnel railway line runs across the north-eastern part of the site, whilst the Southend-on-Sea to London Fenchurch Street railway line dissects the site in an east-west direction.</p> <p>The site has no topography issues.</p>
Condition of Buildings	The conditions of the buildings are in generally good condition. The site has an extensive area of open storage for motor vehicles.
Accessibility	<p>The Site is accessed from London Road, Purfleet and is well connected to the Purfleet By-Pass, the A13 and Junction 30/31 of the M25. The site has secured access.</p> <p>The site is located 1.1 miles from Purfleet Train Station. The site is located 0.3 miles from the closest bus stop on London Road.</p>
Business Types	<p>The site contains a Unilever production plant and a Pura Foods production plant.</p> <p>The western part of the site, and land to the west, on the north side of the railway line, is in operation as part of Purfleet Thames Terminal.</p> <p>Land to the west of the site with a frontage onto the Thames (outside the boundary) contains a port terminal controlled by Cobelfret Ferries who operate daily links with Zeebrugge and Rotterdam and specialise in the transport of vehicles and containers.</p>
Total Rateable Value (£)	£3,667,400

Rateable Value per m² (£)	£97.80
Estimated Floorspace (m²)	Total Floorspace – 37,350m ² Class B1 (Business) – 0 Class B2 (General Industry) – 37,350m ² Class B8 (Warehouse and Distribution) – 0
Estimated Employment Capacity	1,200m ² Class B2 (General Industry) – 1,200m ²
Total Number of rateable Units	5
Building Coverage (%)	5.3% - The low building coverage in part is result of large areas of open land used for the open storage and vehicles associated with the port. This site however has sufficient land to allow for the intensification of the site.
Vacancy: Floorspace (m²)	Total Vacant Floorspace – 0
Potential Employment from Vacant Floorspace	Total Employment – 0
Vacancy: Units	0
Vacancy: Land (ha)	0
Proposed New Employment Sites within site boundary	E2f: Land adjoining Van den Bergh's and Jurgen's E2g: LaFarge Jetty Site E2h: 885-901 London Road
Proposed New Employment Sites adjacent to site boundary	None
Proposed New Employment Sites: Land (Ha)	18.78 (total of three sites)
Proposed New Employment Sites: Potential Floorspace (m²)	62,578 m ² (total of three sites)
Proposed New Employment Sites: Potential Employment	1903 (total of three sites)
Planning Constraints	Overhead Lines Underground Cables Flood Zone 2 & 3 Major Hazard Sites (COMAH)
Planning Permissions since 2001	In total there were 7 planning applications permitted since 2001 that sought a change in level of employment floorspace at the London Road site. These applications amounted to a net increase of the floorspace by 15,080m ² . This is made up of 10,110m ² of industrial floorspace, 4,143m ² of warehouse

	<p>floorspace and 2,985m² of office floorspace. The permitted applications resulted in a loss of 2,158m² of other floorspace.</p> <p>The applications sought a number of extensions and improvement works to existing buildings. A large new production facility was also permitted together with a new laboratory.</p> <p>The increase in floorspace permitted amounted to a net increase in the employment capacity of 530 people.</p>
Notes	N/A
Recommendation	<ol style="list-style-type: none"> 1. Retain existing Primary Industrial and Commercial area. 2. Retain the designation of proposed new Primary Industrial and Commercial sites (labelled E2f, E2g and E2h). 3. Amend the boundary of the existing site on its northern edge to match the boundary indicated on Site E2f.

West Thurrock Marshes

Site Reference	LDF: E1f URS: Cluster 13, 14, 15 and 32
LDF Site Designation	Primary Industrial and Commercial Employment Land
Site Area (ha)	141.32
Site Location & Description	<p>The West Thurrock Marshes site is located to the east of the M25 and generally to the south of the Southend-on-Sea to London Fenchurch Street Railway Line. The Site extends eastwards to Hedley Road.</p> <p>The former West Thurrock Power Station site is located to the south of the site. The River Thames is located to the south east of the Site.</p> <p>The West Thurrock Lagoon and Marshes SSSI covers part of the site.</p> <p>There are no topography issues at this site.</p>
Condition of Buildings	The conditions of the buildings are varied with a significant proportion of buildings in poor condition.
Accessibility	<p>The Site is accessed from London Road, West Thurrock.</p> <p>The site is located 1.7 miles from Grays Train Station. The site is located 0.2 miles from the closest bus stop on London Road.</p>
Business Type	This site contains a variety of business activities. The northern part of the site off London Road provides a well serviced business park. The south-eastern part of the site contains open storage facilities for shipping and distribution and a number of industrial plants. The western part of the site also contains a number of open storage sites but also warehouse, industrial and trucking facilities.
Total Rateable Value (£)	£11,369,275
Rateable Value per m² (£)	£51.70
Estimated Floorspace (m²)	<p>Total Floorspace – 219,900m²</p> <p>Class B1 (Business) – 0</p> <p>Class B2 (General Industry) – 100,750m²</p> <p>Class B8 (Warehouse and Distribution) – 119,142m²</p>
Estimated Employment Capacity	<p>4,500 to 5,550</p> <p>Class B1 (Business) – 0</p> <p>Class B2 (General Industry) – 3,150</p> <p>Class B8 (Warehouse and Distribution) – 1,350 to</p>

	2,400
Total Number of Rateable Units	82
Building Coverage (%)	15.5%
Vacancy: Floorspace (m²)	Total Floorspace – 11,293m ² (including 6,475m ² open storage) Class B1 (Business) – 0 Class B2 (General Industry) – 0 Class B8 (Warehouse and Distribution) – 11,293m ²
Potential Employment from Vacant Floorspace	Total Employment – 130 to 165 Class B1 (Business) – 0 Class B2 (General Industry) – 0 Class B8 (Warehouse and Distribution) – 130 to 165
Vacancy: Units	12 (13.4%)
Vacancy: Land (ha)	14.43
Potential Class B Employment from Vacant Land	685 – 1,390
Proposed New Employment Sites within site boundary	E2j: Land South of London Road, West Thurrock E2ma and E2mb: West Thurrock Power Station
Proposed New Employment Sites adjacent to site boundary	None
Proposed New Employment Sites: Land (Ha)	39.62 (total of three sites)
Proposed New Employment Sites: Potential Floorspace (m²)	128,543m ² (total of three sites)
Proposed New Employment Sites: Potential Employment	2294-3917
Planning Constraints	Overhead Lines Underground Cables Landfill Site Flood Zone 2 & 3 Major Hazard Sites (COMAH) Local Wildlife Site SSSI Tree Preservation Order
Planning Permissions since 2001	In total there were 34 planning applications permitted since 2001 that sought an increase in the level of employment floorspace. These applications amounted to a net increase of the floorspace by 47,866m ² . This is made up of 39,362m ² of warehouse floorspace, 2,254m ² of office

	<p>floorspace, 17,078m² of other uses and a loss of 10,828m² of industrial floorspace.</p> <p>The applications were a mix of new industrial and commercial units and improvement works to existing units</p> <p>The increase in floorspace permitted amounted to an increase in the employment capacity at this site of between 560 and 910 people.</p>
Notes	This industrial area will be subject to further review as part of the Area Action Plan for Lakeside.
Recommendation	<ol style="list-style-type: none"> 1. Retain existing Primary Industrial and Commercial areas 2. Retain the designation of proposed new Primary Industrial and Commercial site (labelled E2m).

Lakeside / Waterglade Industrial Estates, West Thurrock

Site Reference	LDF: E1g URS: Cluster 11 and 12
LDF Site Designation	Primary Industrial and Commercial Employment Land
Site Area (ha)	75.43
Site Location & Description	<p>The Lakeside / Waterglade Industrial Estate Site is located to the east of the M25 and between West Thurrock Way and to north and London Road, West Thurrock to the south.</p> <p>There are no topography issues at this site.</p>
Condition of Buildings	The condition of the buildings is generally good throughout the site.
Accessibility	<p>The Site is accessed from the south by London Road, West Thurrock. The site is accessed from the north by West Thurrock Way and Heron Way from the east.</p> <p>The site is located in close proximity to junction 31 on the M25.</p> <p>The site is located 1.7 miles from Grays Train Station. The site is located 0.2 miles from the closest bus stop on London Road.</p>
Business Types	The western part of the Site contains a number of warehouse and distribution units. Several of these units have been upgraded in recent years. A number of commercial and retail units exist to the east of the site, including B&Q and Ikea retail warehouses and a number of car showrooms. This part of site also contains a number of smaller industrial units.
Total Rateable Value (£)	£10,892,150
Rateable Value per m² (£)	£51.23
Estimated Floorspace (m²)	<p>Total Floorspace – 216,897m²</p> <p>Class B1 (Business) – 0</p> <p>Class B2 (General Industry) – 64,012m²</p> <p>Class B8 (Warehouse and Distribution) – 139,892m²</p> <p>Other Retail – 2,319m²</p> <p>Other Hotel – 5,107m²</p> <p>Other Leisure – 3,282m²</p> <p>Other Sui Generis Car Showrooms – 2,285m²</p>
Estimated Employment Capacity	<p>3765 - 5015</p> <p>Class B1 (Business) – 0</p> <p>Class B2 (General Industry) – 2,000</p> <p>Class B8 (Warehouse and Distribution) – 1,550 to</p>

	2,800 Other Retail – 25 Other Hotel – 100 Other Leisure – 65 Other Sui Generis Car Showrooms – 25
Total Number of Rateable Units	83
Building Coverage	28.1%
Vacancy: Floorspace (m²)	Total Floorspace – 42,985m ² Class B1 (Business) – 0 Class B2 (General Industry) – 0 Class B8 (Warehouse and Distribution) – 31,435m ² Composite Class B2/B8 – 11,550 m ²
Potential Employment from Vacant Floorspace	440 to 930 Class B1 (Business) – 0 Class B2 (General Industry) – 0 Class B8 (Warehouse and Distribution) – 310 to 570 Composite Class B2/B8 – 130 to 360
Vacancy: Units	6
Vacancy: Land (ha)	1.52
Potential Class B Employment from Vacant Land	120 – 475
Proposed New Employment Sites within site boundary	E2k and E2l: Sites located on the east side of the site. These sites have not been taken forward, from the Preferred Options stage, as proposed employment sites. Note: Lakeside Intensification sites are located within this area but are not considered in this study.
Proposed New Employment Sites adjacent to site boundary	None
Proposed New Employment Sites: Land (Ha)	N/A – Sites E2k and E2l have not been taken forward as proposed employment sites
Proposed New Employment Sites: Potential Floorspace (m²)	N/A – Sites E2k and E2l have not been taken forward as proposed employment sites
Proposed New Employment Sites: Potential Employment	N/A – Sites E2k and E2l have not been taken forward as proposed employment sites
Planning Constraints	Flood Zone 2 & 3 Tree Preservation Order
Planning Permissions since 2001	In total there were 16 planning applications permitted since 2001 that sought a change in the level of employment floorspace. These applications amounted to an increase of the

	<p>floorspace by 64,878m². This is made up of 40,208m² of warehouse floorspace, 16,209m² of industrial floorspace, 2,457m² of office floorspace and 6,004 of other floorspace.</p> <p>Several applications sought to significantly increase the amount of floorspace by introducing new units into the Lakeside / Waterglade Industrial Estate site. There is also evidence improvement works and extension to existing units.</p> <p>The increase in floorspace permitted amounted to an increase in the employment capacity at this site of between 1,220 and 1,570 people.</p>
Notes	<p>This area has been subject to the Lakeside Single Issue Review and Thurrock Council will undertake an Area Action Plan to consider an appropriate mix of uses in the area shortly. In the TTGDC Master Plan for Lakeside and West Thurrock the eastern part of the site is shown mainly for retail and leisure uses.</p>
Recommendation	<ol style="list-style-type: none"> 1. Retain existing Primary Industrial and Commercial areas. 2. Re-designate proposal sites E2k and E2l to leisure uses.

Thurrock Park, Little Thurrock

Site Reference	LDF: E1h URS: Cluster 21
LDF Site Designation	Primary Industrial and Commercial Employment Land
Site Area (ha)	23.59
Site Location & Description	<p>The Thurrock Park Site is located to the south east of the urban area of Grays and adjoins the northern boundary of Tilbury Docks. St Andrew's Road (A1089) adjoins the eastern boundary. An Asda supermarket is located to the north east of the site boundary.</p> <p>There are no topography issues at this site.</p>
Condition of Buildings	The site provides good quality modern warehouse and distribution units.
Accessibility	<p>The Site has one access point. This is made from the roundabout junction on the A1089. This road provides direct linkages with Tilbury and Tilbury Dock to the south and the A13 to the north.</p> <p>The site is located 0.6 miles from Tilbury Train Station. The site is served by a bus stop on Thurrock Park Way.</p>
Business Types	This site provides space for port related distribution companies including Bernard Group Plc, a global logistics and transportation management company.
Total Rate Value (£)	£3,398,275
Rateable Value per m² (£)	£64.00
Estimated Floorspace (m²)	<p>Estimated Total Floorspace – 53,100m²</p> <p>Class B1 (Business) – 0</p> <p>Class B2 (General Industry) – 1,550m²</p> <p>Class B8 (Warehouse and Distribution) – 51,550m²</p>
Estimated Employment Capacity	<p>700 to 1,025</p> <p>Class B2 (General Industry) – 50</p> <p>Class B8 (Warehouse and Distribution) – 650 to 1,025</p>
Total Number of Rateable Units	19
Building Coverage	22.5%
Vacancy: Floorspace (m²)	<p>Total Floorspace – 3,050m²</p> <p>Class B1 (Business) – 0</p> <p>Class B2 (General Industry) – 0</p> <p>Class B8 (Warehouse and Distribution) – 3,050m²</p>

Potential Employment from Vacant Floorspace	60 Class B8 (Warehouse and Distribution) – 60
Vacancy: Units	10 (size ranges from 166m ² and 252m ²)
Vacancy: Land (ha)	0
Proposed New Employment Sites within site boundary	E2q: Thurrock Park, Little Thurrock (land to the NW)
Proposed New Employment Sites adjacent to site boundary	E2q(b): Thurrock Park Extension
Proposed New Employment Sites: Land (Ha)	20.82 (total of two sites)
Proposed New Employment Sites: Potential Floorspace (m²)	43,646 m ² (total of two sites)
Proposed New Employment Sites: Potential Employment	1225 (total of two sites)
Planning Constraints	Flood Zone 2 & 3
Planning Permissions since 2001	<p>In total there were 8 planning applications permitted since 2001 that sought a change in the level of employment floorspace.</p> <p>These applications amounted to an increase of the floorspace by 16,287m². This is made up of 14,612m² of warehouse floorspace, 773m² of industrial floorspace, 792m² of office floorspace and 110m² of other floorspace.</p> <p>These applications sought extension to existing warehouse units and the erection of new commercial units.</p> <p>The increase in floorspace permitted amounted to an increase in the employment capacity at this site of between 230 and 360 people.</p> <p>A planning permission has been granted for an extension to the north-east of the estate on to Green Belt land. This decision is subject to a Secretary of State approval.</p>
Notes	N/A
Recommendation	<ol style="list-style-type: none"> 1. Retain existing Primary Industrial and Commercial areas. 2. Amend boundary to reflect the recently completed developments at this site. 3. Amend boundary to reflect pending approval for the planning application to the north-east

	<p>of the site.</p> <p>4. Retain designation of proposed new Primary Industrial and Commercial sites (labelled E2q and E2q(b)).</p>
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Tilbury South

Site Reference	LDF: E1i URS: Cluster 22
LDF Site Designation	Primary Industrial and Commercial Employment Land
Site Area (ha)	27.45
Site Location & Description	<p>The Tilbury South Site is located to the south of Tilbury. The site adjoins Tilbury docks on its western boundary.</p> <p>Tilbury Fort is located to the east of the site. This building is an ancient monument.</p> <p>The River Thames is located to the south.</p>
Condition of Buildings	The condition of the buildings is very good and provides modern warehouse accommodation in association with the port.
Accessibility	<p>The site is accessed from Ferry Road and Fort Road to the south of Tilbury. Ferry Road also serves the adjacent port and provides the main linkage to Dock Road (A1089) which connects to the A13.</p> <p>The site is located 0.7 miles from Tilbury Train Station. The site is served by a bus stop on Fort Road.</p>
Business Types	<p>The site provides space for warehousing and open storage for a car depot including a depot for Hyundai. The recently completed Riverside Business Centre, which provides a range of workshop and office units has attracted service and consultancy businesses.</p> <p>The site also includes an inter-modal road-rail depot.</p>
Total Rate Value (£)	£1,800,825
Rateable Value per m² (£)	£62.42
Estimated Floorspace (m²)	<p>Total Floorspace – 28,850m²</p> <p>Class B1 (Business) – 6,050m²</p> <p>Class B2 (General Industry) – 0</p> <p>Class B8 (Warehouse and Distribution) – 22,800m²</p>
Estimated Employment Capacity	<p>Estimated Employment – 530 to 910</p> <p>Class B1 (Business) – 340</p> <p>Class B8 (Warehouse and Distribution) – 250 to 450</p>
Total Number of Rateable Units	40
Building Coverage	10.5%

Vacancy: Floorspace (m²)	Total Floorspace – 792m ² Class B1 (Business) – 792m ² Class B2 (General Industry) – 0 Class B8 (Warehouse and Distribution) – 0
Potential Employment from Vacant Floorspace	45 Class B1 (Business) – 45
Vacancy: Units	1
Vacancy: Land (ha)	0
Proposed New Employment Sites within site boundary	None
Proposed New Employment Sites adjacent to site boundary	None – for the purposes of this assessment the proposed mixed-use site at Tilbury Riverside (M7) is excluded.
Proposed New Employment Sites: Land (Ha)	N/A
Proposed New Employment Sites: Potential Floorspace (m²)	N/A
Proposed New Employment Sites: Potential Employment	N/A
Planning Constraints	Flood Zone 2 & 3 Explosive Anchorage Local Wildlife Site Tree Preservation Order
Planning Permissions since 2001	<p>In total there were 2 planning applications permitted since 2001 that sought a change in the level of employment floorspace.</p> <p>These applications amounted to an increase of the floorspace by 2,724m². This is made up of 2,674m² of industrial floorspace and 50m² of office floorspace.</p> <p>These applications sought extension to existing warehouse units and the erection of new commercial units.</p> <p>The increase in floorspace permitted amounted to an increase in the employment capacity at this site to 160 people.</p>
Notes	N/A
Recommendation	1. Retain Existing Primary Industrial and Commercial areas.

Milehams Industrial Estate, Purfleet

Site Reference	LDF: E3a URS: Cluster 8
LDF Site Designation	Secondary Industrial and Commercial Employment Land
Site Area (ha)	1.42
Site Location	<p>Milehams Industrial Park is located to the north-west of Purfleet and to the west of Averley. The site is located to the south of London Road (A1306). The northern part of the site adjoins the Southend-on-Sea to London Fenchurch Street Railway Line.</p> <p>The Mar Dyke is located to the south of the industrial estate. This river network provides a buffer area between the industrial area and the residential area to the south.</p> <p>Rainham Marshes is located to the south of the site. The site adjoins the Inner Thames Marshes SSSI.</p> <p>There are no topography issues at this site.</p>
Condition of Buildings	The condition of the buildings is poor throughout the site and in need of upgrading and renewal. The buildings are well used however the localised environment is poor.
Accessibility	<p>There are two main access points into Purfleet Industrial Park. The northern part of the site is accessed from London Road (A1306). The southern part of the site is accessed from New Tank Hill Road (A1090).</p> <p>The site is located 1.2 miles from Purfleet Train Station. The site is located 0.6 miles from the closest bus stop on New Tank Hill Road.</p>
Business Types	This Site accommodates mainly industrial businesses.
Total Rateable Value (£)	£164,900
Rateable Value per m² (£)	£37.00
Estimated Floorspace (m²)	<p>Total Floorspace – 4,457m²</p> <p>Class B1 (Business) – 0</p> <p>Class B2 (General Industry) – 4,457m²</p> <p>Class B8 (Warehouse and Distribution) – 0</p>
Estimated Employment Capacity	<p>140</p> <p>Class B2 (General Industry) – 140</p>
Total Number of Rateable Units	5

Building Coverage	31% - The site is well used and there is limited scope for further intensification of the site.
Vacancy: Floorspace (m²)	Total Vacant Floorspace – 0
Potential Employment from Vacant Floorspace	Total Employment – 0
Vacancy: Units	0
Vacancy: Land (ha)	0
Proposed New Employment Sites within site boundary	None
Proposed New Employment Sites adjacent to site boundary	None
Proposed New Employment Sites: Land (Ha)	N/A
Proposed New Employment Sites: Potential Floorspace (m²)	N/A
Proposed New Employment Sites: Potential Employment	N/A
Planning Constraints	Overhead Lines Flood Zone 2 & 3
Other Constraints	The presence of the Channel Tunnel Railway Line will constrain future redevelopments, particularly with regard to height.
Planning Permissions since 2001	There have been no planning applications at the Milehams Industrial Estate since 2001.
Notes	N/A
Recommendation	1. Retain existing Secondary Industrial and Commercial areas.

Marley Works, Stifford Road, South Ockendon

Site Reference	LDF: E3b URS: 35
LDF Site Designation	Secondary Industrial and Commercial Employment Land
Site Area (ha)	6.0
Site Location & Description	<p>The site is set within a wooded area to the south of Stifford Road. The main settle of South Ockendon is located to the north of the site.</p> <p>The site is identified as a Major Developed Site in the Green Belt (MDS site).</p>
Condition of Buildings	The buildings are in reasonable condition however the majority of the site is used for low-value open storage for building products.
Accessibility	<p>The site is accessed from Stifford Road, which provides linkages to the Averley By-Pass.</p> <p>The site is located 1.9 miles from South Ockendon Train Station. A number of bus routes serve Stifford Road.</p>
Business Types	Construction
Total Rateable Value (£)	£52,000
Rateable Value per m² (£)	£6.96
Estimated Floorspace (m²)	Total Floorspace – 7,465m ² Class B1 (Business) – 0 Class B2 (General Industry) – 7,465m ² Class B8 (Warehouse and Distribution) – 0
Estimated Employment Capacity	230 Class B2 (General Industry) – 230
Total Number of Rateable Units	1
Building Coverage	12.5%
Vacancy: Floorspace (m²)	Total Floorspace – 0
Potential Employment from Vacant Floorspace	Total Employment – 0
Vacancy: Units	0
Vacancy: Land (ha)	0

Potential Class B Employment from Vacant Land	0
Proposed New Employment Sites within site boundary	None
Proposed New Employment Sites adjacent to site boundary	None
Proposed New Employment Sites: Land (Ha)	N/A
Proposed New Employment Sites: Potential Floorspace (m²)	N/A
Proposed New Employment Sites: Potential Employment	N/A
Planning Constraints	Local Wildlife Site Landfill Major Developed Site in Green Belt
Planning Permissions since 2001	There have been a number of minor planning permissions permitted for extensions to existing buildings. There is an appeal outstanding to retain employment and provide a lorry park on site, which includes land extending beyond the boundary of the Major Developed Site into the Green Belt
Notes	This site was considered in analysis that led to the development of the SHLAA, and was subsequently re-designated as a housing site. In the TTGDC Master Plan for Aveley and South Ockendon housing is allocated within the boundary of the MDS.
Recommendation	1. Re-designate as a housing site.

Aveley Industrial Estate, South Ockendon

Site Reference	LDF: E3c URS: Cluster 9
LDF Site Designation	Secondary Industrial and Commercial Employment Land
Site Area (ha)	3.70
Site Location	<p>The Aveley Industrial Estate is located on the fringes of South Ockendon. Open countryside is located to the north and west of the Site. The east of the site adjoins South Ockendon Railway Station and a railway line runs parallel to the site in a north-south direction. A residential area is located beyond the railway line.</p> <p>The southern part of the site adjoins the industrial and commercial buildings that were formerly part of Aveley Industrial Estate. These buildings are in poor condition and are subject to redevelopment proposals.</p>
Condition of Buildings	The site is in good condition.
Accessibility	<p>The site adjoins South Ockendon Railway Station, which provides access to locations such as London Fenchurch Street, Upminster and Grays.</p> <p>There are a number of bus routes located in close proximity to the site. These are located along Arisdale Avenue and Tamrisk Road.</p> <p>The Site is accessed from Arisdale Avenue and is closely linked to South Road (B186), which provides linkages to the A13 and A127.</p>
Business Types	The site provides a large purpose built warehouse facility for Next.
Total Rateable Value (£)	£395,436
Rateable Value per m² (£)	£24.71
Estimated Floorspace (m²)	Total Floorspace – 16,000m ² Class B1 (Business) – 0 Class B2 (General Industry) – 0 Class B8 (Warehouse and Distribution) – 16,000m ²
Estimated Employment Capacity	180 Class B8 (Warehouse and Distribution) – 180
Total Number of Rateable Units	1

Building Coverage	43%
Vacancy: Floorspace (m²)	Total Vacant Floorspace – 0
Potential Employment from Vacant Floorspace	Total Employment – 0
Vacancy: Units	0
Vacancy: Land (ha)	0
Proposed New Employment Sites within site boundary	None
Proposed New Employment Sites adjacent to site boundary	None
Proposed New Employment Sites: Land (Ha)	N/A
Proposed New Employment Sites: Potential Floorspace (m²)	N/A
Proposed New Employment Sites: Potential Employment	N/A
Planning Constraints	N/A
Planning Permissions since 2001	There have been no planning applications at the Aveley Industrial Estate since 2001.
Notes:	N/A
Recommendation	1. Retain existing Secondary Industrial and Commercial designation.

Chafford Hundred North West Zone

Site Reference	LDF: E3d URS: Cluster 10
LDF Site Designation	Secondary Industrial and Commercial Employment Land
Site Area (ha)	0.78 – Approximately 45% of the site is covered by a residential block.
Site Location	The site is located in the north-western part of Chafford Hundred along Fleming Road. The site is located in close proximity to Lakeside Shopping Centre.
Condition of Buildings	The condition of the buildings is very good throughout the site.
Accessibility	The site is accessed from Fleming Road. The site is located 0.2 miles from Chafford Hundred Train Station which links the site to Grays and Southend-on-Sea to the east and London to the west. The site is well located to numerous bus routes that serve the local area.
Business Type	The site is occupied by office-based business uses.
Total Rateable Value (£)	£321,550
Rateable Value per m2 (£)	£131
Estimated Floorspace (m2)	Total Floorspace – 600m ² Class B1 (Business) – 600m ² Class B2 (General Industry) – 0 Class B8 (Warehouse and Distribution) – 0
Estimated Employment Capacity	35 Class B1 (Business) – 35
Total Number of Rateable Units	5
Building Coverage	13% - 0.35 ha of the site is covered by an established residential block and associated parking and service area.
Vacancy: Floorspace (m2)	Total Vacant Floorspace – 0
Potential Employment from Vacant Floorspace	Total Employment – 0
Vacancy: Units	0
Vacancy: Land (ha)	0

Proposed New Employment Sites within site boundary	None
Proposed New Employment Sites adjacent to site boundary	None
Proposed New Employment Sites: Land (Ha)	N/A
Proposed New Employment Sites: Potential Floorspace (m²)	N/A
Proposed New Employment Sites: Potential Employment	N/A
Planning Constraints	Overhead Lines
Planning Permissions since 2001	<p>There have been two permitted planning applications at the Chafford Hundred North West Zone since 2001.</p> <p>The first application was for the erection of four single storey office buildings and second application was for one single storey office building.</p> <p>The site has now been completed and has generated capacity for 35 employment opportunities.</p>
Notes	N/A
Recommendation	<ol style="list-style-type: none"> 1. Retain existing Secondary Industrial and Commercial designation, but amend boundaries to reflect encroachment of residential uses into the area.

434 – 436 London Road, West Thurrock

Site Reference	LDF: E3e URS: Cluster 16
LDF Site Designation	Secondary Industrial and Commercial Employment Land
Site Area (ha)	13.38
Site Location	The Site is located in West Thurrock to the north of the London Road. The site is in close proximity to established residential areas. The Site bounded by residential dwellings and a school playing field to the north. The eastern and southern boundaries are also bounded by residential dwellings, whilst the western boundary adjoins a railway line.
Condition of Buildings	The condition of the buildings is generally very good throughout the site. This are a few bad neighbour uses located on this Site that impact upon local amenity.
Accessibility	The Site is accessed from London Road (A126), which provides good access to the strategic road network and Lakeside Basin.
Business Type	This Site provides for warehouse and distribution businesses. The site contains significant areas of open storage.
Total Rateable Value (£)	£562,000
Rateable Value per m² (£)	£19.25
Estimated Floorspace (m²)	Total Floorspace – 29,183m ² Class B1 (Business) – 0 Class B2 (General Industry) – 8,327m ² Class B8 (Warehouse and Distribution) – 20,856m ²
Estimated Employment Capacity	490 to 680 Class B1 (Business) – 0 Class B2 (General Industry) – 260 Class B8 (Warehouse and Distribution) – 230 to 420
Total Number of Rateable Units	13
Building Coverage	21.8%
Vacancy: Floorspace (m²)	Total Vacant Floorspace – 2,990m ² Class B1 (Business) – 0 Class B2 (General Industry) – 0 Class B8 (Warehouse and Distribution) – 2,990m ²
Potential Employment from Vacant Floorspace	35 to 60 Class B1 (Business) – 0 Class B2 (General Industry) – 0 Class B8 (Warehouse and Distribution) – 35 to 60
Vacancy: Units	1

Vacancy: Land (ha)	0.32
Potential Class B Employment from Vacant Land	25
Proposed New Employment Sites within site boundary	None
Proposed New Employment Sites adjacent to site boundary	None
Proposed New Employment Sites: Land (Ha)	N/A
Proposed New Employment Sites: Potential Floorspace (m²)	N/A
Proposed New Employment Sites: Potential Employment	N/A
Planning Constraints	Overhead Lines Flood Zone 2 and 3 Landfill Site
Planning Permissions since 2001	<p>In total there were 6 planning applications permitted since 2001 that sought a change in the level of employment floorspace.</p> <p>These applications amounted to an increase of the floorspace of 10,712m². This is made up of 6,802m² of warehouse floorspace and 3,552m² of industrial floorspace and 358m² of office floorspace.</p> <p>These applications sought extension to existing warehouse units and the erection of new commercial units.</p> <p>The increase in floorspace permitted amounted to an increase in the employment capacity at this site by 270 people.</p>
Notes	N/A
Recommendation	<ol style="list-style-type: none"> 1. Retain Existing Secondary Industrial and Commercial designation. 2. Consider amendment at north east side of the site (area known as Walker's Land) for potential educational purposes.

Grays South – Manor Way

Site Reference	LDF: E3f URS: Cluster 20
LDF Site Designation	Secondary Industrial and Commercial Employment Land
Site Area (ha)	2.30
Site Location	The Grays South – Manor Way site is located to the south-east of Grays town centre. The north and west of the site are bounded by residential dwellings. The Southend-on-Sea to London Fenchurch Street Railway Line bounds the north-eastern corner of the Site. The southern part of the site is bounded by open spaces. The northern part of Tilbury docks is located beyond this area.
Condition of Buildings	The buildings are in generally good condition, however approximately a quarter of the buildings are in poor condition and are in need of modernising and renewal.
Accessibility	The Site has one access point from Manor Way. The connectivity to the strategic road network is poor and passes through residential areas. The Site is located 0.6 miles from Grays Train Station. There are no bus stops in close proximity.
Business Types	This Site provides space for mainly industrial businesses. There are a number of small scale specialised engineering and electrical firms located at this site. Thurrock Council uses part of the site as a depot.
Total Rateable Value (£)	£351,000
Rateable Value per m² (£)	£55.40
Estimated Floorspace (m²)	Total Floorspace – 6,335m ² Class B1 (Business) – 0 Class B2 (General Industry) – 3,725m ² Class B8 (Warehouse and Distribution) – 2,610m ²
Estimated Employment Capacity	165 Class B1 (Business) – 0 Class B2 (General Industry) – 115 Class B8 (Warehouse and Distribution) – 50
Total Number of Rateable Units	20
Building Coverage	27.5%
Vacancy: Floorspace (m²)	Total Vacant Floorspace – 0

Potential Employment from Vacant Floorspace	Total Employment – 0
Vacancy: Units	0
Vacancy: Land (ha)	0
Proposed New Employment Sites within site boundary	E2p: Green field site within exiting industrial area
Proposed New Employment Sites adjacent to site boundary	None
Proposed New Employment Sites: Land (Ha)	0.06
Proposed New Employment Sites: Potential Floorspace (m²)	236 m ²
Proposed New Employment Sites: Potential Employment	6
Planning Constraints	Flood Zone 2 and 3 Major Hazard Sites (COMAH)
Planning Permissions since 2001	<p>In total there was 1 planning applications permitted since 2001 that sought a change in the level of employment floorspace.</p> <p>This application sought a 68m² extension to an existing warehouse unit. The increase in floorspace would increase in the employment capacity by just 1 person. This permission has been completed.</p>
Notes	N/A
Recommendation	<ol style="list-style-type: none"> 1. Retain existing Secondary Industrial and Commercial area. 2. Amend the proposed new Primary Industrial and Commercial area designation (E2p) to a proposed new Secondary Industrial and Commercial area designation.

Globe Works, Little Thurrock

Site Reference	LDF: E3g URS: 23
LDF Site Designation	Secondary Industrial and Commercial Employment Land
Site Area (ha)	8.1
Site Location & Description	The site is set within a predominantly residential area. The site is active and consequently creates a bad neighbour for the adjoining residential uses.
Condition of Buildings	The buildings are poor condition with many in very poor condition.
Accessibility	The site is accessed from Rectory Road via a residential area. The narrow roads are unsuitable for HGV vehicles and access and servicing is difficult. The site is located 1.2 miles from Grays Train Station. A number of bus routes serve rectory Road.
Business Types	Industrial and light industrial. There are a number of car related businesses such as mechanics.
Total Rateable Value (£)	£1,250,270
Rateable Value per m² (£)	£43.93
Estimated Floorspace (m²)	Total Floorspace – 28,462m ² Class B1 (Business) – 0 Class B2 (General Industry) – 18,910m ² Class B8 (Warehouse and Distribution) – 9,552m ²
Estimated Employment Capacity	780 Class B2 (General Industry) – 590 Class B8 (Warehouse and Distribution) – 190
Total Number of Rateable Units	64
Building Coverage	35.1%
Vacancy: Floorspace (m²)	Total Floorspace – 1,680m ² Class B2 (General Industry) – 1,680m ²
Potential Employment from Vacant Floorspace	Total Employment – 50
Vacancy: Units	4
Vacancy: Land (ha)	0
Proposed New Employment Sites within site boundary	None

Proposed New Employment Sites adjacent to site boundary	None
Proposed New Employment Sites: Land (Ha)	N/A
Proposed New Employment Sites: Potential Floorspace (m²)	N/A
Proposed New Employment Sites: Potential Employment	N/A
Planning Constraints	N/A
Planning Permissions since 2001	There have no planning applications permitted since 2001 that will result in a net increase of employment floorspace.
Notes	This site was considered in the Urban Capacity Study (2005) and in the analysis that led to the development of the SHLAA, and was subsequently proposed for re-designation as a housing site.
Recommendation	1. Re-designate the existing Secondary Industrial and Commercial designation to housing and relocate existing businesses to more appropriate sites.

Bata / Thames Industrial Park, East Tilbury

Site Reference	LDF: E3h URS: Cluster 27
LDF Site Designation	Secondary Industrial and Commercial Employment Land
Site Area (ha)	13.88
Site Location	The Bata / Thames Industrial Park is located to the south-east of East Tilbury. The southern and western boundaries adjoin open countryside. The northern boundary partially adjoins open countryside but also adjoins residential dwellings. Princess Margaret Road forms the eastern boundary.
Condition of Buildings	The site has a significant number of buildings that are in need regeneration and renewal. The site is dominated by three large blocks of distinctive architectural character. These buildings are listed grade II. The remainder of the site is characterised by single storey industrial buildings. The site falls within the East Tilbury (Bata) Conservation Area, designated in 1993.
Accessibility	<p>The site is accessed from Princess Margaret Road, which provides the main linkages to the main strategic road network via the East Tilbury.</p> <p>The Site is located 0.5 miles from East Tilbury Train Station, which provides linkages to Grays, London Fenchurch and Southend-on-Sea.</p> <p>There are a number of bus stops in close proximity located along Princess Margaret Road.</p>
Business Types	The Bata / Thames Industrial Park is occupied by a number of industrial and warehouse operations. Part of one of the main blocks is taken up by 1Self Storage.
Total Rateable Value (£)	£261,000
Rateable Value per m² (£)	£5.00
Estimated Floorspace (m²)	Total Floorspace – 51,693m ² Class B1 (Business) – 0 Class B2 (General Industry) – 0 Class B8 (Warehouse and Distribution) – 51,693m ²
Estimated Employment Capacity	575 to 1,025 Class B8 (Warehouse and Distribution) – 574 to 1,025
Total Number of Rateable Units	11
Building Coverage	21%

Vacancy: Floorspace (m²)	Total Vacant Floorspace – 16,950m ² Class B1 (Business) – 0 Class B2 (General Industry) – 0 Class B8 (Warehouse and Distribution) – 16,950m ²
Potential Employment from Vacant Floorspace	300 Class B2 (General Industry) – 0 Class B8 (Warehouse and Distribution) – 300
Vacancy: Units	0
Vacancy: Land (ha)	0
Proposed New Employment Sites within site boundary	E4d: Two sites at western end of site.
Proposed New Employment Sites adjacent to site boundary	None
Proposed New Employment Sites: Land (Ha)	3.13
Proposed New Employment Sites: Potential Floorspace (m²)	14,080
Proposed New Employment Sites: Potential Employment	560
Planning Constraints	Flood Zone 2 and 3 Listed Buildings Site is located within a Conservation Area Major Hazard Sites (COMAH) Adjacent to Green Belt
Planning Permissions since 2001	There was 1 planning application permitted since 2001 that sought a new industrial building. This application amounted to an increase of the floorspace of 4,466m ² . This is made up of 4,756m ² of industrial floorspace and a loss of 102m ² of other floorspace, a loss of 20m ² of warehouse floorspace and a loss of 68m ² of office floorspace. This application was not implemented and has now expired.
Notes	This site was considered in the Urban Capacity Study (2005) and in the analysis that led to the development of the SHLAA, and was subsequently proposed for re-designation as a mixed-use site including live-work units and an emphasis on cultural industries.
Recommendation	1. Retain Existing Secondary Industrial and Commercial areas and include designation for mixed-use on part of the site.

Durox Works, Linford

Site Reference	LDF: E3i URS: Cluster 34
LDF Site Designation	Secondary Industrial and Commercial Employment Land
Site Area (ha)	14.50
Site Location	The Durox Works Site is located to the north-west of the village of Linford. The site is bounded to the west and north-east by a wooded area and countryside to the north and south-west.
Condition of Buildings	The Site contains large areas of open storage. The buildings are in generally good condition.
Accessibility	The Site is accessed from Buckingham Hill Road, which provides access to the A13 via Stanford Road. The site is located 0.6 miles from East Tilbury Railway Station, which provides linkages to Southend-on-Sea, Grays and London Fenchurch Street. The Site is located in close proximity to bus stops along Buckingham Hill Road.
Business Types	Durox Works is solely occupied by Tarmac. This site is used as a manufacturing facility for aircrete and construction related materials.
Total Rateable Value (£)	£677,900
Rateable Value per m² (£)	£33.41
Estimated Floorspace (m²)	Total Floorspace – 20,288m ² Class B1 (Business) – 0 Class B2 (General Industry) – 20,288m ² Class B8 (Warehouse and Distribution) – 0
Estimated Employment Capacity	634 Class B2 (General Industry) – 634
Total Number of Rateable Units	4
Building Coverage	14%
Vacancy: Floorspace (m²)	Total Vacant Floorspace – 0
Potential Employment from Vacant Floorspace	Estimated Employment Potential – 0
Vacancy: Units	0
Vacancy: Land (ha)	0

Proposed New Employment Sites within site boundary	None
Proposed New Employment Sites adjacent to site boundary	None
Proposed New Employment Sites: Land (Ha)	N/A
Proposed New Employment Sites: Potential Floorspace (m²)	N/A
Proposed New Employment Sites: Potential Employment	N/A
Planning Constraints	Overhead Lines Local Wildlife Site Major Hazard Sites (COMAH)
Planning Permissions since 2001	<p>In total there was 1 planning application permitted since 2001 that sought an extension to an existing industrial building.</p> <p>This application amounted to an increase of the floorspace of 80m².</p> <p>The net increase in floorspace permitted amounted to an increase in the employment capacity at this site by 3 people.</p> <p>The permission has been completed.</p>
Notes	N/A
Recommendation	1. Retain existing Secondary Industrial and Commercial areas.

Stanhope Industrial Park, Stanford-le-Hope

Site Reference	LDF: E3j URS: Cluster 28
LDF Site Designation	Secondary Industrial and Commercial Employment Land
Site Area (ha)	11.65
Site Location	Stanhope Industrial Park is located to the south-east of Stanford-le-Hope and to the west of the proposed London Gateway port facility. The Site is surrounded countryside on all sides and is close proximity to the River Thames. The railway line that serves the proposed London Gateway port facility bounds the northern boundary.
Condition of Buildings	The Site contains several vacant plots. The buildings that exist on the site are generally in good condition although a small number are in poor condition. The Site also contains a large salvage yard.
Accessibility	<p>The Site is located away from the main road network, which is accessed via the urban area of Stanford-Le-Hope.</p> <p>The Site is 1 mile from Stanford-le-Hope Railway Station which provides linkages to Southend-on-Sea, Grays and London Fenchurch Street. There are no bus services in close proximity.</p>
Business Types	This site provides space for industrial businesses. The site also contains a salvage yard that has open storage of motor vehicles and Travis Perkins Builders' Merchants.
Total Rateable Value (£)	£29,650
Rateable Value per m² (£)	£8.17
Estimated Floorspace (m²)	Total Floorspace – 3,629m ² Class B1 (Business) – 0 Class B2 (General Industry) – 3,629m ² Class B8 (Warehouse and Distribution) – 0
Estimated Employment Capacity	113 Class B2 (General Industry) – 113
Total Number of Rateable Units	8
Building Coverage	2.5% - There is potential for the intensification of this site through extensions to existing buildings and erection of new buildings.
Vacancy: Floorspace (m²)	Total Vacant Floorspace – 0
Potential Employment from Vacant Floorspace	Estimated Employment Potential – 0

Vacancy: Units	0
Vacancy: Land (ha)	3.11
Potential Class B Employment from Vacant Land	245 – 315
Proposed New Employment Sites within site boundary	E4e: Land on southern boundary of Stanhope Industrial Park
Proposed New Employment Sites adjacent to site boundary	None
Proposed New Employment Sites: Land (Ha)	4.16
Proposed New Employment Sites: Potential Floorspace (m²)	18,729
Proposed New Employment Sites: Potential Employment	185-745
Planning Constraints	Flood Zone 2 and 3
Planning Permissions since 2001	<p>In total there were 4 planning applications permitted since 2001 that sought a change in the level of employment floorspace.</p> <p>These applications amounted to an increase of the floorspace of 28,655m². This is made up of 28,095m² of Class B1, B2 and B8 floorspace and 560m² of office floorspace.</p> <p>These applications sought extension to existing warehouse units and a significant extension to the site.</p> <p>The increase in floorspace permitted amounted to an increase in the employment capacity at this site by 900 people.</p>
Notes	N/A
Recommendation	1. Retain Existing Secondary Industrial and Commercial areas.

Appendix 7: Employment Land Audit – Site Schedules for existing employment land previously re- designated to other uses in the LDF (Preferred Options stage)

Askew Farm Site, Askew Farm Road

Site Reference	LDF: HWO40 (Housing) SHLAA: GRI03 URS: Part of Cluster 33
LDF Site Designation	Housing
Site Area (ha)	5.7
Site Location	The site is located north of A126 London Road between Grays and South Stifford. The Askew Farm site is the most southerly of three related sites. To the north is the former Murco Oil depot (redeveloped as 'Cliffside Industrial Estate'), located in a former quarry. To the north-west is the existing Kaneb Oil Depot.
Condition of Buildings	Buildings located on the Askew Farm Lane site are in a poor or average condition.
Accessibility	The site is accessed on a poorly maintained road running north from the A126 London Road. Access to trunk roads is poor, and there is no access to Wharves.
Business Type	The site uses include haulage, storage and warehouse/distribution uses.
Total Rateable Value (£)	-
Rateable Value per m² (£)	-
Estimated Floorspace (m²)	1700m ² Class B1 (Business) - 0 Class B2 (General Industry) - 1200m ² Class B8 (Warehouse and Distribution) - 500m ²
Estimated Employment Capacity	50 Class B1 (Business) - 0 Class B2 (General Industry) - 40 Class B8 (Warehouse and Distribution) - 10
Total Number of Rateable Units	8
Building Coverage	8%
Vacancy: Floorspace (m²)	834
Potential Employment from Vacant Floorspace	26 (B2 General Industry)
Vacancy: Units	0
Vacancy: Land (ha)	0

Potential Class B Employment from Vacant Land	0
Planning Constraints	Major Hazard Sites (COMAH) Tree Preservation Orders (west side of site)
Planning Permissions since 2001	An application for outline planning permission for residential development, industrial units, public open space, remediation of contaminated land and demolition of buildings was received in 2004. It remains undecided.
Notes	This site was designated as housing in the LDF, following assessment in the Urban Capacity Study (2005) and the analysis undertaken in the development of the SHLAA. It is designated within the South Stifford Residential Zone in the TTGDC Master Plan for Lakeside and West Thurrock.
Recommendation	1. Retain designation in the LDF as a proposed site for housing

Aveley Industrial Estate, Arisdale Avenue, South Ockenden (Southern part of the site)

Site Reference	LDF Preferred Option: HWO17 (Housing) SHLAA: OCK3 & OCK21 URS: Southern Part of Cluster 9
LDF Site Designation	Housing
Site Area (ha)	17.72
Site Location	<p>The Aveley Industrial Estate is located on the fringes of South Ockendon. Open countryside is located to the west of the site at its northern end, while directly to the north is the Next warehouse within LDF Existing Secondary Employment site E3c.</p> <p>The east of the site is bounded by the north-south railway line that runs parallel to it into South Ockendon railway station further north. A residential area is located beyond the railway line. To the south end of the site is a residential area and the Bonnygate County Primary School.</p> <p>The site is principally located east of Arisdale Avenue, but at its southern end a subsidiary part of the site is located on the west side of Arisdale Avenue. This part of the site abuts residential development further west.</p>
Condition of Buildings	Buildings on the site are generally in a poor condition.
Accessibility	<p>The site is close to South Ockendon Railway Station, which provides access to locations such as London Fenchurch Street, Upminster and Grays.</p> <p>There are a number of bus routes located in close proximity to the site. These are located along Arisdale Avenue and Tamrisk Road.</p> <p>The Site is accessed from Arisdale Avenue and is closely linked to South Road (B186), which provides linkages to the A13 and A127.</p>
Business Type	The site includes a former Ford Factory, currently being partially used for storage. Smaller units on Ardmore Road, Ayron Road and Arcany Road are occupied by businesses including structural engineers, garage services and furniture manufacturers. Business uses on the site west of Arisdale Avenue include a pharmacy warehouse, laundry services and logistics.
Total Rateable Value (£)	£1,154,650

Rateable Value per m² (£)	£15.27
Estimated Floorspace (m²)	75,600 m ² Class B1 (Business) – 0 Class B2 (General Industry) – 19,900m ² Class B8 (Warehouse and Distribution) – 55,700m ²
Estimated Employment Capacity	1735 Class B1 (Business) – 0 Class B2 (General Industry) – 620 Class B8 (Warehouse and Distribution) – 1115
Total Number of Rateable Units	26
Building Coverage	49%
Vacancy: Floorspace (m²)	12,500 m ²
Potential Employment from Vacant Floorspace	340 (B2 General Industry and B8 Distribution and Warehousing)
Vacancy: Units	3 (including partial vacancy within ex-Ford factory)
Vacancy: Land (ha)	0.83ha – The figure comprises the two sites within the overall area, located at its southern end, which have been cleared for residential development. The Durabella site is not included in this calculation because residential development on the site is approaching completion.
Potential Class B Employment from Vacant Land	90 (based on a B2 use). Note that both sites, however, are seeking planning permission for housing.
Planning Constraints	Within 250m of Landfill Site
Planning Permissions since 2001	<p>Permission for residential development has been sought on several areas within the site. The Durabella site (OCK21) is currently being developed with completion anticipated within 2010. Two other sites, at the southern end of the main site (OCK3), have been cleared for residential development. A decision on whether to grant permission is pending on the site to the south of Arcany Road, at its western end, while permission for 40 units at the eastern end of Arcany Road was granted in June 2009.</p> <p>In addition, a decision is pending from the TTGDC for outline permission to demolish the former Ford Factory building and redevelop the site with up to 650 residential dwellings.</p>
Notes	This site was designated for housing in the LDF Preferred Option, following assessment in the Urban Capacity Study (2005) and the analysis undertaken in the development of the SHLAA. It is also designated for housing in the TTGDC Master Plan for Aveley and

	Ockendon.
Recommendation	1. Retain designation in the LDF as a proposed site for housing.

Baryta Close, Stanford-Le-Hope

Site Reference	LDF:HWO108 SHLAA: STW06 URS: Cluster 29
LDF Site Designation	Residential
Site Area (ha)	2.02
Site Location	<p>Baryta Close is adjacent, on its west side, to the railway line running north from Stanford-le-Hope station. Immediately to the south is London Road, Stanford –le-Hope while north and east of the site are residential areas. Access to the site is via Victoria Road, and runs through residential development.</p> <p>Baryta Close is a two minute walk from the centre of Stanford-le-Hope.</p>
Condition of Buildings	80% of the buildings on site are in a good condition, while 20% are in a poor condition.
Accessibility	The site has poor linkages to the trunk road network. Current servicing of services in site causes congestion.
Business Type	The site includes a three storey office building on London Road, and a social club located at the junction of London Road and Victoria Road (considered a <i>Sui Generis</i> use). Set behind are industrial units housing garage services and components manufacture. On the west side of the site (Brewery Works), Daybreak Windows has a factory and showroom for PVC windows, doors and conservatories.
Total Rateable Value (£)	£212,820
Rateable Value per m² (£)	£37.34
Estimated Floorspace (m²)	5,700 m ² Class B1 (Business) – 900m ² Class B2 (General Industry) – 4000m ² Class B8 (Warehouse and Distribution) - 0 m ² Other (<i>sui generis</i>) – 800 m ²
Estimated Employment Capacity	175 Class B1 (Business) – 50 Class B2 (General Industry) – 125 Class B8 (Warehouse and Distribution) - 0
Total Number of Rateable Units	14
Building Coverage	25%

Vacancy: Floorspace (m²)	116 (offices)
Potential Employment from Vacant Floorspace	6 (B1 Office)
Vacancy: Units	Half of ground floor of office building
Vacancy: Land (ha)	0
Potential Class B Employment from Vacant Land	0
Planning Constraints	Flood Zones 2 & 3 Major Hazard Sites (COMAH)
Planning Permissions since 2001	There is no recent history of major applications on this site.
Notes	This site was designated for housing in the LDF, following assessment in the Urban Capacity Study (2005) and the analysis undertaken in the development of the SHLAA. It is also designated for housing in the TTGDC Master Plan for East Thurrock, with an approximate allocation of 120 homes.
Recommendation	<ol style="list-style-type: none"> 1. Retain designation in the LDF as a proposed site for housing. 2. Correct site boundary on the east side of the site to exclude existing Victorian houses.

Former BPB (Thames Board Mills) Site, London Road, Purfleet (west side of site)

Site Reference	LDF: HWO7 (Housing – with permission) SHLAA: WTS12 URS: Part of Cluster 3
LDF Site Designation	Housing
Site Area (ha)	11.4
Site Location	The site is located between London Road on its northern boundary, and the London - Shoeburyness Railway line on its southern boundary. The western part of the BPB site is located west of Mill Road, which bisects the wider site.
Condition of Buildings	The condition of the buildings is generally good although approximately 20% of buildings are in poor condition.
Accessibility	The Site only has one access point which is from Mill Road which is located off London Road. The site has secured access. The site is located 0.6 miles from Purfleet Train Station. The site is located 0.2 miles from the closest bus stop on London Road.
Business Type	It is believed the site buildings may be used for storage.
Total Rateable Value (£)	N/A (Removed from rating list in 2007. The Site had a rateable value of £160,000 in 2005)
Rateable Value per m² (£)	N/A
Estimated Floorspace (m²)	45,500 m ² Previously B2, it is understood this site may be being partially used for storage.
Estimated Employment Capacity	1420 (B2 General Industry)
Total Number of Rateable Units	3
Building Coverage	36%
Vacancy: Floorspace (m²)	Unknown
Potential Employment from Vacant Floorspace	Unknown
Vacancy: Units	3 (assumption)
Vacancy: Land (ha)	2.85 (1.25ha of which will be re-allocated to housing on this site, 1.6ha of which will be re-allocated within new

	boundary of Primary Industrial and Commercial site E1c, to the east
Potential Class B Employment from Vacant Land	230 (Class B8 Warehousing and Distribution). 100 potential jobs to be lost through reallocation of site to housing.
Planning Constraints	Flood Zone 2 & 3 Major Hazard Sites (COMAH)
Planning Permissions since 2001	Outline Permission for residential development (2005 – time expired)
Notes	This site was designated for housing in the LDF, following assessment in the Urban Capacity Study (2005) and the analysis undertaken in the development of the SHLAA. It is also designated for housing in the TTGDC Purfleet Centre Development Framework.
Recommendation	<ol style="list-style-type: none"> 1. Retain designation in the LDF as a proposed site for housing. 2. Conclude boundary changes on the east side of the site.

Former Coal Yard Site, Purfleet

Site Reference	LDF: HWP6 (Housing – with permission) SHLAA: WTS08 & WTS42 URS: Part of Cluster 3.
LDF Site Designation	Housing
Site Area (ha)	7.16
Site Location	The site is located between the River Thames and the railway line at Purfleet.
Condition of Buildings	This site is contiguous with the area known as Cory's Wharf. The site has been cleared of buildings.
Accessibility	Adequate local road access, although much of it passes through residential development to the north. Good access to public transport at Purfleet railway station.
Business Type	The site has been cleared.
Total Rateable Value (£)	N/A
Rateable Value per m² (£)	N/A
Estimated Floorspace (m²)	0 - The site has been cleared and is vacant land
Estimated Employment Capacity	0 – the site has been cleared
Total Number of Rateable Units	0 – the site has been cleared
Building Coverage	0%
Vacancy: Floorspace (m²)	0 – the site has been cleared
Potential Employment from Vacant Floorspace	0 – the site has been cleared
Vacancy: Units	0 – the site has been cleared
Vacancy: Land (ha)	7.16
Potential Class B Employment from Vacant Land	780 (B2 General Industry use)
Planning Constraints	Flood Zone 2 & 3 Major Hard Sites (COMAH)

Planning Permissions since 2001	These sites have full planning permissions for residential development dating from 2005 and 2007. There may be a re-plan in light of new ownership and more recent TTGDC Purfleet Centre Development Framework.
Notes	<p>This site was designated for housing in the LDF, following assessment in the Urban Capacity Study (2005) and the analysis undertaken in the development of the SHLAA. It is also designated for housing in the TTGDC Master Plan for Purfleet, and has been recently acquired by the TTGDC.</p> <p>The URS Report (2007) recognised the road access difficulties associated with the site and noted that mixed use options for the north of the site might include residential and community facilities, as the area lies within close proximity to a large area of existing and proposed new housing along the Thames waterfront and beyond.</p>
Recommendation	1. Retain designation in the LDF as a proposed site for housing

Coward Bros and Star Industrial Estate, St John's Road, East Tilbury

Site Reference	LDF: HWO99 SHLAA: EAT01 URS: Cluster 24
LDF Site Designation	Residential
Site Area (ha)	4.01
Site Location	The site is located south of Linford Road, Chadwell St Mary (though falling within East Tilbury). It is on the southern outskirts of the village and is accessed via St John's Road, which is shared by residential users living on St John's Road, Giffordside and Furness Close.
Condition of Buildings	Most of the buildings on site are modern distribution warehouses in good condition. 20% of the site's buildings, mainly situated on the southern part of the site, are in a poor condition.
Accessibility	The site suffers from what URS (2007) described as its extremely poor connections to the trunk road network, being within Chadwell St Mary and some distance from Thurrock's principal road network. Sharing access to the site with a residential road is problematic. The site has no access to wharves
Business Type	This site principally provides space for distribution and warehouse businesses at its north end, operated by Coward Warehousing Limited. The southern part of the site contains a car workshop and other miscellaneous businesses.
Total Rateable Value (£)	£500,500
Rateable Value per m² (£)	£36.53
Estimated Floorspace (m²)	13,700 m ² Class B1 (Business) - 0 m ² Class B2 (General Industry) – 2300m ² Class B8 (Warehouse and Distribution) – 11,400m ²
Estimated Employment	300 Class B1 (Business) – 0 Class B2 (General Industry) – 70 Class B8 (Warehouse and Distribution) – 230
Total Number of Rateable Units	25
Building Coverage	34%
Vacancy: Floorspace (m²)	3100m ² (estimate) Note that much of the Coward Industrial Estate is currently available to let, though currently in use.

Potential Employment from Vacant Floorspace	62 (B8 Warehouse and Distribution)
Vacancy: Units	6
Vacancy: Land (ha)	0
Potential Class B Employment from Vacant Land	0
Planning Constraints	Immediately to the south west of the site is an area indentified as a 'Potential Local Wildlife Site'. Landfill Site
Planning Permissions since 2001	No recent large applications on the site.
Notes	<p>This site is designated for housing in the Preferred Options LDF, following assessment in the Urban Capacity Study (2005) and the analysis undertaken in the development of the SHLAA. It falls within the TTGDC Master Plan area for South East Thurrock.</p> <p>This estate was noted by URS (2007) to have bad neighbourhood uses. The site creates noise pollution and attracts significant HGV traffic onto residential roads. Its very poor strategic road access and access difficulties from the local residential roads are problematic.</p>
Recommendation	1. Retain designation in the LDF as a proposed site for housing

Gumley Road, South Stifford

Site Reference	LDF: HWP11 (Housing – with permission) and HWO36 (Housing) SHLAA: WTS30 & WTS31 URS: Cluster 17
LDF Site Designation	Housing
Site Area (ha)	5.1
Site Location	The two sites making up the wider Gumley Road site are located immediately north of the railway line running east/west from Shoeburyness to London. The north side of the site is delineated by Gumley Road itself, with a residential area beyond, on the north side of the road. The eastern end of the site abuts the A126 London Road.
Condition of Buildings	25% Very Good, 50% Good, 25% Poor.
Accessibility	Good linkages to trunk road network, indirect access to wharves.
Business Type	Storage and distribution, wholesale building and showrooms.
Total Rateable Value (£)	£651,275
Rateable Value per m² (£)	£33.06
Estimated Floorspace (m²)	19,700 m ² Class B1 (Business) – 900m ² Class B2 (General Industry) – 11600m ² Class B8 (Warehouse and Distribution) – 7200m ²
Estimated Employment Capacity	555 Class B1 (Business) – 50 Class B2 (General Industry) – 360 Class B8 (Warehouse and Distribution) – 145
Total Number of Rateable Units	18
Building Coverage	39%
Vacancy: Floorspace (m²)	700m ² (including offices and workshops)
Potential Employment from Vacant Floorspace	28
Vacancy: Units	4 industrial workshops + 2 floors of offices
Vacancy: Land (ha)	0.17ha, of which 0.12ha is a disused railway cutting

Potential Class B Employment from Vacant Land	0, for the purposes of this study - land not likely to be viable for development.
Planning Constraints	Flood Zones 2 & 3
Planning Permissions since 2001	Two permissions for residential use, including outline permission granted in 2004 on the Commodore Kitchens/Acorn Trading Estate site. The Acorn Trading Estate site now has permission for 236 dwellings, although an imminent start is not likely.
Notes	This site is designated for housing in the Preferred Options LDF, following assessment in the Urban Capacity Study (2005) and the analysis undertaken in the development of the SHLAA. It is designated within the South Stifford Residential Zone in the TTGDC Master Plan for Lakeside and West Thurrock.
Recommendation	1. Retain designation in the LDF as proposed sites for housing

Sandy Lane Pit and Merrydale Works, East Tilbury

Site Reference	LDF: HWO100 (Housing) SHLAA: EAT03 URS: Cluster 25
LDF Site Designation	Housing
Site Area (ha)	2.27
Site Location	The employment cluster is located to the east of Sandy Lane, Chadwell St Mary (though addressed East Tilbury), and south of Linford Road. It encompasses two sites, with land accessed via Sandy Lane (the western part of the site) and land accessed directly from Linford Road (the eastern site – Merrydale Works)
Condition of Buildings	The site provides a very poor general environment, especially on the western of the two sites. Overall 10% of the buildings are in good condition, 90% are in a very poor condition.
Accessibility	The sites has extremely poor connections to trunk road network, and problematic access through residential areas. It has no access to wharves
Business Type	On the eastern site (Merrydale Works) are companies involved in activities including road haulage and supply and manufacture of plastics. On the western site, which includes smaller units, of various small scale business and Sui Generis uses.
Total Rateable Value (£)	£68,750
Rateable Value per m² (£)	£19.64
Estimated Floorspace (m²)	3500 m ² Class B1 (Business) – 0m ² Class B2 (General) – 2100m ² Class B8 (Warehouse and Distribution) – 1400m ²
Estimated Employment Capacity	95 Class B1 (Business) – 0 Class B2 (General) - 65 Class B8 (Warehouse and Distribution) – 30
Total Number of Rateable Units	24 (larger units in Merrydale Works, smaller units on the western site off Sandy Lane)
Building Coverage	16%
Vacancy: Floorspace (m²)	0
Potential Employment from Vacant Floorspace	0

Vacancy: Units	0. All appear occupied though some in a very poor condition.
Vacancy: Land (ha)	0
Potential Class B Employment from Vacant Land	0
Planning Constraints	Landfill Site
Planning Permissions since 2001	No history of recent planning applications/permissions.
Notes	<p>This site is designated for housing in the Preferred Options LDF, following assessment in the Urban Capacity Study (2005) and the analysis undertaken in the development of the SHLAA. It falls within the TTGDC Master Plan area for South East Thurrock.</p> <p>The two sites are in poor condition and have bad neighbourhood uses. The eastern site in particular, which is comprised principally of small units, is in a very poor condition and has very poor strategic road access and access difficulties from the local residential roads.</p>
Recommendation	<ol style="list-style-type: none"> 1. Retain designation in the LDF as a proposed site for housing. 2. Exclude existing residential properties at the north of the site from the site boundary.

School Field Road, West Thurrock

Site Reference	LDF: HWP9 (Housing – with permission) SHLAA: WTS18 URS: eastern part of Cluster 32.
LDF Site Designation	Housing
Site Area (ha)	8.34
Site Location	<p>The site is located south of London Road at West Thurrock and extends south to the Grays-London railway line. It includes land south of School Field Road and south of the residential properties on Essex Road, Flint Street and Elm Terrace.</p> <p>A subsidiary part of the site is located north of the road on land between Third Avenue and The Rookery/Rookery Court. This land is currently being redeveloped with residential properties and is nearing completion.</p>
Condition of Buildings	Considered very good by URS, when assessed in 2006/2007, nearly all the buildings on the site have since been demolished to make way for residential uses.
Accessibility	The site has good access to the trunk road network via London Road.
Business Type	There are very few sites remaining in employment use, the site having been largely cleared for residential redevelopment. Several workshops remain at the south western corner of the site. Part of the site has been redeveloped with a new Primary School.
Total Rateable Value (£)	Not found
Rateable Value per m² (£)	Not found
Estimated Floorspace (m²)	3,200m ² Class B1 (Business) – 0 m ² Class B2 (General Industry) – 3200m ² Class B8 (Warehouse and Distribution) – m ²
Estimated Employment Capacity	100 Class B1 (Business) – 0 m ² Class B2 (General Industry) – 0 Class B8 (Warehouse and Distribution) – 0
Total Number of Rateable Units	4 remaining (SW corner of the site).
Building Coverage	4% (since demolition of the majority of the site)
Vacancy: Floorspace (m²)	0

Potential Employment from Vacant Floorspace	N/A
Vacancy: Units	0
Vacancy: Land (ha)	The site is in transition between industrial and residential uses, and so will be briefly vacant, but is not considered, for the purposes of this study, to be vacant employment land.
Potential Class B Employment from Vacant Land	N/A
Planning Constraints	Flood Zone 2 & 3 Within 250m of Landfill Site
Planning Permissions since 2001	The site is being redeveloped with 414 housing units and a school, with 49 units anticipated for completion by June 2010. Principal permissions for this site date from 2006, with outstanding matters and amendments dating from 2009.
Notes	This site is designated for housing in the Preferred Options LDF, following assessment in the Urban Capacity Study (2005) and the analysis undertaken in the development of the SHLAA. It falls within the West Thurrock Residential Zone in the TTGDC Master Plan for Lakeside and West Thurrock. Redevelopment of the site with residential properties and a school has started.
Recommendation	1. Retain designation in the LDF as a proposed site for housing.

South of London Road and Lyndale Estate, West Thurrock

Site Reference	LDF: HWO27 (Housing) SHLAA: WTS19 URS: eastern part of Cluster 32.
LDF Site Designation	Housing
Site Area (ha)	6.04
Site Location	The site is located south of London Road, West Thurrock at the junction with Stoneness Road. It extends south to the Grays-London railway line, and is immediately west of the Schoolfield Road site (HWP9). It is to the east of the residential properties on Essex Road, Flint Street and Elm Terrace.
Condition of Buildings	The remaining buildings on the site are in a good or very good condition. The most easterly part of the site (the Lyndale Estate), abutting Stoneness Road, has been cleared of buildings.
Accessibility	The site has good access to the trunk road network
Business Type	The part of the site remaining in employment use includes distribution and freight uses, scaffolding and access services operated respectively by Anglo-Overseas, SGB and Loxam Access.
Total Rateable Value (£)	£394,100 (buildings remaining)
Rateable Value per m² (£)	£60.63
Estimated Floorspace (m²)	6500m ² Class B1 (Business) – 0 m ² Class B2 (General Industry) – 0m ² Class B8 (Warehouse and Distribution) – 6500m ²
Estimated Employment Capacity	130 Class B1 (Business) – 0 Class B2 (General Industry) – 0 Class B8 (Warehouse and Distribution) – 130
Total Number of Rateable Units	3
Building Coverage	11%
Vacancy: Floorspace (m²)	0
Potential Employment from Vacant Floorspace	N/A

Vacancy: Units	0
Vacancy: Land (ha)	1.39ha (the Lyndale Industrial Estate).
Potential Class B Employment from Vacant Land	105 (Class B8 Warehouse and Distribution)
Planning Constraints	Flood Zone 2 & 3 Within 250m of Landfill Site
Planning Permissions since 2001	Permission was sought for a residential development on the vacant Lyndale Estate section of the site (2008). This application was withdrawn. There have been no applications to redevelop the western section of the site, which is in employment use.
Notes	This site is designated for housing in the Preferred Options LDF, following assessment in the Urban Capacity Study (2005) and the analysis undertaken in the development of the SHLAA. It falls within the West Thurrock Residential Zone in the TTGDC Master Plan for Lakeside and West Thurrock. Redevelopment of the site with residential properties and a school has started.
Recommendation	1. Retain designation in the LDF as a proposed site for housing.

Titan Pit, Grays

Site Reference	LDF: HWO51 (Housing) SHLAA: GTH04 URS: Cluster 36
LDF Site Designation	Housing
Site Area (ha)	13.83
Site Location	Titan Pit is located north of Grays Town Centre, with residential and allotment uses directly to its north and east. To its west the A1012 Hogg Lane runs from Grays Town Centre to the A13 further north.
Condition of Buildings	Generally good.
Accessibility	Titan Pit is accessed directly off the A1012 Hogg Lane with good access to the A13 and the wider trunk road network to the north. The site is located in a former quarry, restricting access to one steeply descending road off Hogg Lane.
Business Type	Operational chemical plant/factory
Total Rateable Value (£)	£640,000
Rateable Value per m² (£)	£44.14
Estimated Floorspace (m²)	14,500 m ² Class B1 (Business) – 0 Class B2 (General Industry) – 14,500m ² Class B8 (Warehouse and Distribution) – 0
Estimated Employment Capacity	455 Class B1 (Business) – 0 Class B2 (General Industry) – 455 Class B8 (Warehouse and Distribution) – 0
Total Number of Rateable Units	Unclear – access not possible
Building Coverage	10.5%
Vacancy: Floorspace (m²)	0
Potential Employment from Vacant Floorspace	0
Vacancy: Units	0
Vacancy: Land (ha)	4.25

Potential Class B Employment from Vacant Land	460 (B2 General Industry)
Planning Constraints	SSSI located to the west, across Hogg Lane. Flood Zone (2 & 3) South eastern part of site considered a 'Potential Local Wildlife Site' Landfill Site
Planning Permissions since 2001	There have been no large-scale applications, beyond permitted applications for additional industrial premises, since 1997, when an application were made to redevelop the site with residential properties.
Notes	This site is designated for housing in the Preferred Options LDF, following assessment in the Urban Capacity Study (2005) and the analysis undertaken in the development of SHLAA. It is also designated for housing in the TTGDC Master Plan for Grays Town Centre, and is estimated to have the potential to accommodate 1100 new homes.
Recommendation	1. Retain designation in the LDF as a proposed site for housing.

Wouldham Works ('Fiddler's Reach'), South Stifford

Site Reference	LDF: HWP10 (Housing – with permission) SHLAA: WTS32 & WTS32a URS: Eastern Part of Cluster 15
LDF Site Designation	Housing
Site Area (ha)	9.87
Site Location	Wouldham Works is located south of the Shoeburyness – London railway line which runs east-west across its northern boundary. Its southern boundary meets the Thames.
Condition of Buildings	All of the buildings remaining on site are derelict/empty and the site is therefore considered vacant.
Accessibility	The Wouldham Works site has good access to the trunk road network and direct access to Wharves.
Business Type	Previously the site included a warehouse/distribution park and industrial estate. Buildings on site, however, are currently empty and available to let.
Total Rateable Value (£)	N/A
Rateable Value per m² (£)	N/A
Estimated Floorspace (m²)	0 – All buildings on the site are vacant/empty
Estimated Employment	0 – All buildings on the site are vacant/empty
Total Number of Rateable Units	0 – All buildings on the site are vacant/empty
Building Coverage	9%
Vacancy: Floorspace (m²)	0 – All buildings on the site are vacant/empty
Potential Employment from Vacant Floorspace	N/A
Vacancy: Units	0 – All buildings on the site are vacant/empty
Vacancy: Land (ha)	9.87
Potential Class B Employment from Vacant Land	1975 (B8 Warehousing and Distribution)
Planning Constraints	Flood Zones 2 & 3

Planning Permissions since 2001	Applications were made in 2004 and 2008 to redevelop the site with housing. The 2004 application was granted by Thurrock Council, but is time expired. There is a TTGDC resolution to approve the 2008 application, which includes 1,244 residential units. Commercial units are proposed on the west side of the site (see Appendix 8, Site E2n) as part of this application.
Notes	This site is designated for housing in the Preferred Options LDF, following assessment in the Urban Capacity Study and the SHLAA. It is also designated for housing within the South Stifford Residential Zone in the TTGDC Master Plan for Lakeside and West Thurrock.
Recommendation	1. Retain designation in the LDF as a proposed site for housing.

Appendix 8: Proposed New Employment Sites

The following sites are sites proposed for new Primary or Secondary Industrial and Commercial land in the Local Development Framework, which are not immediately adjacent to the existing employment sites considered in Appendix 6. The figures here reproduce those provided by Tribal in the *Employment Sites Review* (2010)

LDF Reference	Site Name	Current Use	Site Area (Ha)	Total potential floorspace	Total jobs (low)	Total jobs (high)
E2n	Wouldham Works, western strip (amended boundary)	Existing industrial (vacant)	0.68	608	24	24
E2o	Land Adjoining Tamarisk Road, South Ockendon	Greenfield	0.35	1563	62	62
E2r	Land North of Tilbury, Adj. Dock Approach Road, Tilbury	Greenfield	15.00	58,500	500	1673
E2s	Tilbury Power Station, North	Greenfield	13.94	55,756	618	1555
E2t	Shell Haven, 'London Gateway', Corringham and Fobbing	Former Oil Refinery	243.18	Not provided	11,000	13,000
E2 RAa	Ponds Farm, Purfleet	Greenfield	8.75	38,686	1136	1136

Wouldham Works, western strip (amended boundary)

Site Reference	LDF: E2n URS: Part of Cluster 15
LDF Site Designation	New Primary Industrial and Commercial
Site Area (ha)	0.68
Site Location	This site is a strip on the far west side of the Wouldham Works site, abutting the access road running north-south.
Condition of Buildings	Buildings on site are in a poor condition and vacant
Accessibility	The site is accessed from Hedley Avenue, and thereafter has relatively good access onto the trunk road network.
Business Types	Vacant existing industrial land
Estimated Potential Floorspace (m²)	608 (Tribal figures (2010))
Estimated Employment Potential	24 (Tribal figures (2010))
Planning Constraints	N/A
Planning Permissions since 2001	A 2008 application for 1,244 residential units on the wider Wouldham Works site (HWP10 - see Appendix 7), also included 2,880 m ² of B1, B2 and B8 floorspace on this site. There is a TTGDC resolution to approve the application.
Notes	This site forms a buffer between the industrial uses to the east of the site, and the new residential development proposed for the larger Wouldham Works ('Fiddler's Reach') site (HWP10), to the west.
Recommendation	1. Retain the site's designation for Primary Employment in the LDF.

Land Adjoining Tamarisk Road, South Ockendon

Site Reference	LDF: E2o URS: Not considered
LDF Site Designation	New Primary Industrial and Commercial
Site Area (ha)	0.35
Site Location	The site is located immediately south of South Ockendon Railway Station, on the east side of the railway line. It is bounded on its east side by Tamarisk Road, running north - south.
Condition of Buildings	There are no buildings on site – the site is greenfield land.
Accessibility	<p>The site adjoins South Ockendon Railway Station, which provides access to locations such as London Fenchurch Street, Upminster and Grays.</p> <p>There are a number of bus routes located in close proximity to the site. These are located along Arisdale Avenue and Tamarisk Road.</p> <p>The Site is easily accessible from South Road (B186), which provides linkages to the A13 and A127.</p>
Business Types	Currently greenfield land.
Estimated Potential Floorspace (m²)	1563 (Tribal figures (2010))
Estimated Employment Potential	62 (Tribal figures (2010))
Planning Constraints	N/A
Planning Permissions since 2001	None. 1999 outline permission granted for B1, time expired.
Notes	N/A
Recommendation	1. Retain the site's designation for Primary Employment in the LDF.

Land North of Tilbury, Adj. Dock Approach Road, Tilbury

Site Reference	LDF: E2r URS: Not considered
LDF Site Designation	New Primary Industrial and Commercial
Site Area (ha)	15.00
Site Location	The site is located on the north-west side of Tilbury, and east of the Asda Roundabout.
Condition of Buildings	There are no buildings on site – the site is greenfield land.
Accessibility	The site is currently accessed from Gaylor Road, a residential <i>cul-de-sac</i> . This is unlikely to be suitable for a Primary Industrial and Commercial site. Alternative access may be possible from Dock Road.
Business Types	Currently Greenfield Land, with Go-Cart track located centrally.
Estimated Potential Floorspace (m²)	58,500 (Tribal figures (2010))
Estimated Employment Potential	500-1673 (Tribal figures (2010))
Planning Constraints	N/A
Planning Permissions since 2001	None.
Notes	N/A
Recommendation	1. Retain the site's designation for Primary Employment in the LDF.

North Site, Tilbury Power Station

Site Reference	LDF: E2s URS: Cluster 26.1
LDF Site Designation	New Primary Industrial and Commercial
Site Area (ha)	13.94
Site Location	The site is east of Tilbury, and separated from the town by the railway line running South West – North East. It is located immediately north of Tilbury Power Station
Condition of Buildings	There are no buildings on the site.
Accessibility	The site can be accessed off Fort Road, Tilbury. Its connections to the trunk road network are poor and it has no access to wharves.
Business Types	There are no existing businesses on site.
Estimated Potential Floorspace (m²)	56,000 (Tribal figures (2010))
Estimated Employment Potential	618-1555 (Tribal figures (2010))
Planning Constraints	Flood Zone 2 & 3 Adjacent to Green Belt Local Wildlife Site Setting of Tilbury Fort.
Planning Permissions since 2001	No history of planning applications/permissions for development on this green field site.
Notes	N/A
Recommendation	1. Retain the site's designation for New Primary Employment in the LDF.

Shell Haven ('London Gateway')

Site Reference	LDF: E2t URS: Cluster 30
LDF Site Designation	New Primary Industrial and Commercial
Site Area (ha)	243.18
Site Location	The site is located between the River Thames to the south and the A1014 (The Manor Way) to the north. Immediately to the east is the Coryton Oil Refinery.
Condition of Buildings	The site has been cleared of buildings since being assessed by URS in 2006/2007. Previously an oil refinery, the site is currently vacant.
Accessibility	Good linkages to trunk road network and direct access to wharves.
Estimated Potential Floorspace (m²)	Not provided (Tribal)
Estimated Employment Potential	11,000-13,000 (Tribal figures (2010))
Planning Constraints	Flood Zones 2 & 3 Major Hazard Sites (COMAH) Abuts Mucking Flats Ramsar Site Other Environmentally Sensitive Areas also abut the site, including Local Wildlife Sites and Biodiversity Sites of Local Interest Adjacent to Green Belt Landfill Site
Planning Permissions since 2001	Planning permission achieved for business park and harbour empowerment order for a new deep water port (2007)
Notes	N/A
Recommendation	1. Retain the site's designation for New Primary Employment in the LDF.

Ponds Farm, Purfleet

Site Reference	LDF: E2 RAa
LDF Site Designation	Reasonable Alternative for Primary Employment
Site Area (ha)	8.75
Site Location	This is a roughly triangular site located between the A13 to the immediate north-east, the A1306 Arterial Road to the immediate west and Purfleet Road to the immediate south and south-east.
Condition of Buildings	There are buildings in the southern corner of the site, through they occupy less than 4% of what is otherwise an open green field site.
Accessibility	The site is immediately adjacent to both the A13 (running from Shoeburyness to London) and the A1306 London Road, which connects the Thurrock Urban Area to the A13. The site is therefore extremely well connected to the truck road network.
Estimated Potential Floorspace (m²)	38,686 (Tribal figures (2010))
Estimated Employment Potential	1136 (Tribal figures (2010))
Planning Constraints	Green Belt Flood Zone 2 & 3
Planning Permissions since 2001	The TTGDC is resolved to grant outline permission for 38,686 sqm of B1, B2 and B8 development on the site (2008). Permission not yet granted.
Notes	N/A
Recommendation	1. Designate the site for New Primary Employment in the LDF.

Appendix 9: Other Sites

The following sites are sites not currently designated to Primary or Secondary Industrial and Commercial land in the Local Development Framework, but which are in industrial and commercial use. They are not included in the overall assessment of employment land included in this ELR, but are summarised for future consideration.

Ultrabox Purfleet By-Pass, Purfleet

Site Reference	LDF: N/A URS: Eastern Part of URS Cluster 4
LDF Site Designation	Not designated.
Site Area (ha)	8.6
Site Location	The site is located in Purfleet, to the south of the Purfleet By Pass and the Channel Tunnel Railway Line. The site is bounded residential properties to the south and Botany Way industrial area to the west.
Condition of Buildings	Excellent
Accessibility	The site has good road access directly from the Purfleet By-Pass, and from there good access to the truck road network.
Business Types	Warehouse recently occupied by Carpetright PLC.
Total Rateable Value (£)	-
Rateable Value per m² (£)	-
Estimated Floorspace (m²)	43,000 m ² Class B1 (Business): 0m ² Class B2 (General Industry): 0m ² Class B8 (Warehouse and Distribution): 43,000m ²
Estimated Employment	480 – 860 Class B1 (Business): 0 Class B2 (General Industry): 0 Class B8 (Warehouse and Distribution): 480 - 860
Total Number of Rateable Units	1
Building Coverage	50%
Vacancy: Floorspace (m²)	0
Potential Employment from Vacant Floorspace	0
Vacancy: Units	0
Vacancy: Land (ha)	0. The SSSI forming part of the land on which the site was developed is not considered vacant land for the purposes of this study.
Planning Constraints	SSSI located immediately north west of site (also designated a local wildlife site). The layout of the

	existing facility on site was tailored to acknowledge the SSSI. Tree Preservation Orders
Planning Permissions since 2001	Although designated for housing in Thurrock's un-adopted UDP (2003), the site has since been redeveloped as a major warehouse facility following the granting of permission in December 2002.
Notes	N/A
Recommendation	1. Designate the site as an existing Primary Industrial and Commercial Employment site in the LDF.

Cliffside Industrial Estate (Former Murco Oil Depot Site), Askew Farm Road

Site Reference	LDF: HWO42 (Housing) SHLAA: GRI02 URS: Part of Cluster 33
LDF Site Designation	Housing. The site is allocated to housing in the SHLAA in the very long term (beyond the LDF plan period). It was formerly designated as an Oil and Chemical Storage Site.
Site Area (ha)	6.5
Site Location	The site is located north of A126 London Road between Grays and South Stifford in a former quarry. After the Murco Oil depot was removed the site was redeveloped as 'Cliffside Industrial Estate'. To the immediate west of the site is the existing Kaneb Oil Depot.
Condition of Buildings	Buildings located on the Cliffside Industrial Estate are less than 10 years old and generally in a good condition.
Accessibility	The site is accessed on a poorly maintained road running north from the A126 London Road. Access to trunk roads is poor, and there is no access to Wharves.
Business Type	The site uses include haulage, vehicle repairs, storage and warehouse/distribution uses.
Total Rateable Value (£)	£233,950
Rateable Value per m² (£)	£58.48
Estimated Floorspace (m²)	4000m ² Class B1 (Business): 0m ² Class B2 (General Industry): 1000m ² Class B8 (Warehouse and Distribution): 3000m ²
Estimated Employment	90 Class B1 (Business): 0 Class B2 (General Industry): 30 Class B8 (Warehouse and Distribution): 60
Total Number of Rateable Units	7
Building Coverage	6%
Vacancy: Floorspace (m²)	0
Potential Employment from Vacant Floorspace	0
Vacancy: Units	0

Vacancy: Land (ha)	0 – Site currently fully utilised for storage.
Potential Class B Employment from Vacant Land	0
Planning Constraints	Major Hazard Sites (COMAH) Flood Zone 3 Landfill Site
Planning Permissions since 2001	None. Most recent permissions date from the 1990s and are time expired.
Notes	This site was designated as housing in the LDF, following assessment in the Urban Capacity Study (2005) and the analysis undertaken in the development of the SHLAA. It is designated within the South Stifford Residential Zone in the TTGDC Master Plan for Lakeside and West Thurrock.
Recommendation	1. Retain designation in the LDF as a proposed site for housing.

Appendix 10: Vacant Sites (on land designated to Employment)

a) Purfleet Industrial Park

Site	Size	Description	Thurrock Borough Local Plan (1997) Policy	Thurrock UDP Deposit (2003) Policy	Potential Development	Potential Jobs	Recommendation
V1	0.44	Cleared land with full hard standing coverage. Used during the construction of the adjacent Channel Tunnel Railway Line.	T17(b): Land safeguarded for Channel Tunnel Rail Link	TRA23: Land safeguarded for Channel Tunnel Rail Link	Small site that is surplus to Channel Tunnel Rail Link safeguarding. Potential for small scale warehousing.	35	Potential new employment site
V2	0.37	Cleared land with partial hard standing coverage. Used during the construction of the adjacent Channel Tunnel Railway Line.	T17(b): Land safeguarded for Channel Tunnel Rail Link	TRA23: Land safeguarded for Channel Tunnel Rail Link	Small site that is no longer required to be safeguarded for Channel Tunnel Rail Link. Potential for small scale warehousing.	30	Potential new employment site

b) Botany Way

Site	Size	Description	Thurrock Borough Local Plan (1997) Policy	Thurrock UDP Deposit (2003) Policy	Potential Development	Potential Employment	Recommendation
V3	5.51	Cleared land formerly occupied by oil storage.	LN16: Area of Local Nature Conservation Significance and Ecological Corridor	EMP2(c): Land for new industrial and commercial development in Botany Quarry.	This site is well located to the Purfleet Train Station proposed by the Thurrock Thames Gateway. The site would be more appropriate for non-employment uses. The site is also constrained by a local nature conservation and ecological designation.	-	To be considered with regard to TTGDC's Purfleet Development Strategy.

c) Former BPB, London Road

Site	Size	Description	Thurrock Borough Local Plan (1997) Policy	Thurrock UDP Deposit (2003) Policy	Potential Development	Potential Employment	Recommendation
V4	1.22	The whole site is vacant and has been subject to an outline planning permission.			The site is constrained being within close proximity to a major hazards site (COMAH). Potential for mixed Class B employment uses.	690	No Change

d) Dolphin Estate / LaFarge

Site	Size	Description	Thurrock Borough Local Plan (1997) Policy	Thurrock UDP Deposit (2003) Policy	Potential Development	Potential Employment	Recommendation
V5	1.74	The site is located adjacent to recent strategic warehouse developments. Access is from Armor Road which is largely residential character. This will restrict development potential due to amenity issues.	T2(n): New Road Building: Dolphin Estate Greenlands E2(j): Land for new industrial and commercial development in Greenlands Quarry.	EMP2(g): Land for new industrial and commercial development in Greenlands Quarry.	The site would provide an appropriate small scale Class B location to compliment surrounding uses. Access is from Armor Road, which is residential in character. This will restrict the intensity of use at this site.	75	No Change – Potential development subject to site specific access and drainage issues.
V6	0.44	Located adjacent to existing and recently completed Class B units. The site is accessed from Dolphin Way	E2(j): Land for new industrial and commercial development in Greenlands Quarry.	EMP1: Development within industrial and commercial areas.	The site is appropriate for small scale Class B development.	35	No Change

F) West Thurrock Marshes

Site	Size	Description	Thurrock Borough Local Plan (1997) Policy	Thurrock UDP Deposit (2003) Policy	Potential Development	Potential Employment	Recommendation
V7	6.15	Located to the north of the Channel Tunnel Railway Line and south of the Southend-on-Sea to London Fenchurch St Railway Line. It is currently partially used for open storage.	T17(b): Land safeguarded for Channel Tunnel Rail Link	TRA3(j): Oliver Close Diversion in association with Channel Tunnel rail Link. TRA4(e): Road Improvement Schemes - Oliver Close	Opportunity to intensify the site for Class B uses.	250 – 690	No Change
V8	0.56	Located adjacent to the Channel Tunnel Railway Line. It is hard standing and pre-fabricated buildings.	T17(b): Land safeguarded for Channel Tunnel Rail Link	TRA3(j): Oliver Close Diversion in association with Channel Tunnel rail Link.	Opportunity to intensify the site for small scale Class B uses.	50	No Change
V9	0.24	Located adjacent to the Channel Tunnel Railway Line. It contains open land.	T17(b): Land safeguarded for Channel Tunnel Rail Link	TRA3(j): Oliver Close Diversion in association with Channel Tunnel rail Link.	Opportunity to intensify the site for small scale Class B uses. However potential access issues. Would need to be developed with Site 12.	20	No Change

V10	0.45	Located adjacent to the Channel Tunnel Railway Line. Used for open land.	T17(b): Land safeguarded for Channel Tunnel Rail Link	TRA3(j): Oliver Close Diversion in association with Channel Tunnel rail Link.	Surplus Channel Tunnel Rail Link land. Opportunity to intensify the site for small scale Class B uses.	35	No Change
V11	0.82	Located adjacent to the Channel Tunnel Railway Line. It contains hard standing.	T17(b): Land safeguarded for Channel Tunnel Rail Link	TRA3(j): Oliver Close Diversion in association with Channel Tunnel rail Link.	Surplus Channel Tunnel Rail Link land. Opportunity to intensify the site for small scale Class B uses.	65	No Change
V12	1.09	Located adjacent to the Channel Tunnel Railway Line. It contains hard standing. Part of the area restricted by access to railway line.	T17(b): Land safeguarded for Channel Tunnel Rail Link	TRA3(j): Oliver Close Diversion in association with Channel Tunnel rail Link.	Surplus Channel Tunnel Rail Link land. Opportunity to intensify the site for small scale Class B uses.	40 - 120	No Change
V13	3.86	Located adjacent to the Channel Tunnel Railway Line. It contains hard standing.	T17(b): Land safeguarded for Channel Tunnel Rail Link	TRA3(j): Oliver Close Diversion in association with Channel Tunnel rail Link.	Surplus Channel Tunnel Rail Link land. Opportunity to intensify the site for small scale Class B uses.	170 - 310	No Change

V14	1.26	Located adjacent to the Channel Tunnel Railway Line. It contains hard standing and small unit.	T17(b): Land safeguarded for Channel Tunnel Rail Link	TRA3(j): Oliver Close Diversion in association with Channel Tunnel rail Link.	Surplus Channel Tunnel Rail Link land. Opportunity to intensify the site for small scale Class B uses.	55 - 100	No Change
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g) Lakeside / Waterglade

Site	Size	Description	Thurrock Borough Local Plan (1997) Policy	Thurrock UDP Deposit (2003) Policy	Potential Development	Potential Employment	Recommendation
V15	1.21	The site is located in a central position within the estate. The site contains hard standing currently that is partially used for open storage.	-	EMP1: Development within industrial and commercial areas.	Opportunity to intensify the site for Class B uses.	95 – 130	No Change

h) 434 – 436 London Road

Site	Size	Description	Thurrock Borough Local Plan (1997) Policy	Thurrock UDP Deposit (2003) Policy	Potential Development	Potential Employment	Recommendation
V16	0.32	Site is currently used for open storage.	E3: Secondary industrial and commercial area	E3(d): Secondary industrial and commercial area	Opportunity to intensify the site for small scale Class B uses.	25	Potential new employment site

I) Stanhope Industrial Park

Site	Size	Description	Thurrock Borough Local Plan (1997) Policy	Thurrock UDP Deposit (2003) Policy	Potential Development	Potential Employment	Recommendation
17	2.29	The site is located to the south west of Stanford-le-Hope and is in close proximity to the proposed London Gateway. The site contains hard standing.	EMP3(r): Development within Secondary Industrial and Commercial Areas	EMP3(o): Development within Secondary Industrial and Commercial Areas	Opportunity to intensify the site for Class B uses.	180 - 250	No Change

Appendix 11: Vacant Sites: Planning History

V1 - Purfleet Industrial Park

Planning Permission Number	Decision Date	Approved Planning Permission: Description
87/00827/FUL	28/09/1987	Siting of two temporary portakabins
87/00920/FUL	15/01/1988	Additional Parking Area
01/00596/CTRL	20/09/2001	Channel Tunnel Rail Link revised proposal for Aveley Viaduct
02/01367/CTRL	24/10/2003	Associated Channel Tunnel Rail Link mitigation and restoration

V2 - Purfleet Industrial Park

Planning Permission Number	Decision Date	Approved Planning Permission: Description
89/01006/FUL	23/02/1990	Two storage buildings and ancillary accommodation

V3 - Botany Quarry / Tank Lane, Purfleet

Planning Permission Number	Decision Date	Approved Planning Permission: Description
04/00124/FUL	15/04/2004	Engineering works to remediate contaminated land

V3a - Botany Quarry / Tank Lane, Purfleet

Planning Permission Number	Decision Date	Approved Planning Permission: Description
97/00638/CTRL	18/09/1997	Construction arrangements for the pipeline diversion and the gas pressure reduction station to be constructed as part of the A13 utilities diversion corridor required to accommodate the CTRL and the A13
02/01367/CTRL	24/10/2003	Associated Channel Tunnel Rail Link mitigation and restoration
07/01224/FUL	25/02/2008	Proposed open storage and car parking with access road to Botany Way

V4 – Former BPB, London Road, Purfleet

Planning Permission Number	Decision Date	Approved Planning Permission: Description
05/00001/OUT	28/09/2005	Re-development for a mix of uses including residential (C3), community uses (including some or all of uses A1/A2/A3/D1/D2) and employment uses(B1/B2/B8) with public open space, enhanced riverside walkway, bridge over railway, landscaping, associated new highway and pedestrian/cycleway access into and within site and associated works.

V5 – Dolphin Estate / Lafarge, West Thurrock

Planning Permission Number	Decision Date	Approved Planning Permission: Description
94/00479/FUL	21/11/1994	Business (B1) General Industrial (B2) + Storage Distribution (B8) with ancillary lorry parking raising of quarry floor level using inert materials to permit development
95/00661/FUL	16/08/1995	B1, B2, and B8 development of centre and west zones with road layout and also 587000 m2 warehousing distribution depot (west zone) with ancillary lorry and car parking access tunnel under stonehouse lane, with roundabout on stonehouse lane.
97/00854/OUT	02/09/1998	Raising of quarry floor and development with business use (B1, b and c) General Industrial (B2) and storage/distribution (B8) with new access to Purfleet Bypass (outline application)

V6 – Dolphin Estate / Lafarge, West Thurrock

Planning Permission Number	Decision Date	Approved Planning Permission: Description
80/01249/FUL	16/01/1981	Extension to sacking building to include palletisation plant
94/00479/FUL	21/11/1994	Business (B1) General Industrial (B2) + Storage Distribution (B8) with ancillary lorry parking raising of quarry floor level using inert materials to permit development
95/00661/FUL	16/08/1995	B1, B2, and B8 development of centre and west zones with road layout and also 587000 m2 warehousing distribution depot (west zone) with ancillary lorry and car parking access tunnel under Stonehouse Lane, with roundabout on Stonehouse Lane.

V7 – West Thurrock Marshes

Planning Permission Number	Decision Date	Approved Planning Permission: Description
61/00605/FUL	20/09/1962	Oil storage tankage for all oils and chemicals, with auxiliary steam plant, jetty rail sidings, office canteen etc, on approximately 207 acres at West Thurrock Marshland, Riverside Estate, West Thurrock
85/00220A/FUL	10/07/1985	Workshop storage building with ancillary offices

V8 – West Thurrock Marshes

Planning Permission Number	Decision Date	Approved Planning Permission: Description
61/00605J/FUL	01/11/1979	Approval of reserved matters relating to access
84/00026/FUL	21/03/1984	Container repair workshop and container store

85/00220A/FUL	10/07/1985	Workshop storage building with ancillary offices
98/00921/CTRL	28/01/1999	Construction arrangements for West Thurrock viaduct package
98/00922/CTRL	28/01/1999	West Thurrock viaduct & associated earth works, noise barrier Oliver Road bridge, modifications to QE2 bridge, location of auto-transformer and associated works
02/01367/CTRL	24/10/2003	Mitigation and restoration

V9 – West Thurrock Marshes

Planning Permission Number	Decision Date	Approved Planning Permission: Description
61/00605/FUL	20/09/1962	Oil storage tankage for all oils and chemicals, with auxiliary steam plant, jetty rail sidings, office canteen etc, on approximately 207 acres at West Thurrock Marshland, Riverside Estate, West Thurrock
84/00026/FUL	21/03/1984	Container repair workshop and container store
85/00220A/FUL	10/07/1985	Workshop storage building with ancillary offices

V10 – West Thurrock Marshes

Planning Permission Number	Decision Date	Approved Planning Permission: Description
52/00207/FUL	30/10/1952	Industrial buildings
61/00605J/FUL	01/11/1979	Approval of reserved matters relating to access
72/00488/FUL	05/02/1973	Parking Area for Road Tanker Vehicles
85/00220A/FUL	10/07/1985	Workshop storage building with ancillary offices
85/00220F/FUL	30/01/1987	Office building
95/00462/FUL	21/09/1995	Morline Site First floor addition to existing office
01/00783/FUL	16/08/2005	Concrete Products Factory

V11 – West Thurrock Marshes

Planning Permission Number	Decision Date	Approved Planning Permission: Description
02/00418/OUT	30/05/2002	Outline application for Testing laboratory for quality and quantity verification of mineral oils and petrochemicals, offices ancillary storage and car parking
07/01181/LDC	26/11/2007	Confirmation that previous use may be lawfully resumed. (Transport yard/container stacking/workshop & offices)
09/00381/FUL	05/08/2009	Construction and operation of container distribution centre, including welfare office, workshop building and associated items.

V12 – West Thurrock Marshes

Planning Permission Number	Decision Date	Approved Planning Permission: Description
81/00779/FUL	20/10/1981	Container and trailer storage and repair base
83/00449/FUL	09/08/1983	Portakabin type office
07/00821/LDC	24/09/2007	Confirmation that previous use may be lawfully resumed. (Container and trailer storage and repair base with ancillary office and workshop) in compliance with planning permission THU/779/91

V13 – West Thurrock Marshes

Planning Permission Number	Decision Date	Approved Planning Permission: Description
79/00508/OUT	11/03/1980	Trailer rental depot with ancillary portakabin offices
80/00349/FUL	10/02/1981	Trailer rental depot with ancillary portakabin offices
83/00586/FUL	19/10/1983	Change of use to storage of containers as extension of adjacent container repair depot
85/00561/FUL	31/08/1985	Portacabin type office
90/00903/FUL	20/12/1990	New office building
90/00426/FUL	07/09/1990	Portable building and wash area
91/00616/FUL	18/10/1991	Erection of tank cleaning building with ancillary works
07/01178/LDC	26/11/2007	Confirmation that previous use may be lawfully resumed. (Change of use to storage of containers as extension of adjacent container repair depot) in compliance with Planning Permission THU/586/83

V14 – West Thurrock Marshes

Planning Permission Number	Decision Date	Approved Planning Permission: Description
80/00878/OUT	10/02/1981	Container storage (repair) road distribution and sales with ancillary offices and workshop)
83/00611/FUL	01/08/1984	Workshop and portable buildings and use of size as general haulage depot and container terminal
85/00446/FUL	31/07/1985	Hot Charge Mastic Asphalt Facility and Depot
87/00319/FUL	10/07/1987	Steel Framed Building for Plant Garage
97/00378/FUL	28/08/1997	Change of use to storage of shipping container, stacked 5 high maximum and repair of same

V15 – Lakeside / Waterglade Industrial Estates, West Thurrock

Planning Permission Number	Decision Date	Approved Planning Permission: Description
78/00992/FUL	02/02/1979	General warehousing and servicing of road vehicles
80/00240/FUL	21/10/1980	General warehousing, distribution and servicing of road vehicles
80/01364/FUL	26/10/1981	Transport and distribution depot with open storage of LPG in cylinders, together with storage and distribution of normally empty gas tanks of 1/2 - 2 tonnes capacity
90/00927/FUL	08/02/1991	Change of use of site from Storage and Distribution of L.P.G to Transport and Distribution Depot
06/00575/TTGDC	01/10/2007	Demolition of existing buildings, site clearance and construction of new distribution unit with associated ancillary offices, car parking, operational yard and associated external works

V16 – 434 – 436 London Road, West Thurrock

Planning Permission Number	Decision Date	Approved Planning Permission: Description
61/00437/FUL	08/07/1961	Timber storage
73/01195/FUL	19/10/1973	Timber drying kiln
77/00631/FUL	22/09/1977	Car parking and circulation area
98/00891/FUL	18/02/2005	Workshop

V17 – Stanhope Industrial Park, Stanford-le-Hope

Planning Permission Number	Decision Date	Approved Planning Permission: Description
55/00301/FUL	20/10/1956	Erection of a canteen and ablution block in connection with a chemical fertilizer factory
04/00765/OUT	26/11/2004	Outline application for 28,095 square metres of B1(c), B2 and ancillary B1(a) and B8 uses, landscaping and access improvements
09/50023/TTGDC	14/09/2009	Reserved matters pursuant to outline consent 04/00765/OUT. Proposed development of 24,863 sq.m of B1(C), B2 and ancillary B1(A) & B8 floorspace, access and landscape

Appendix 12: Employment Land Audit – Maps











































































