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AGENDA

LOCAL PLAN PANEL MEETING

Date: Thursday, 20 September 2018
Time: 7.00 pm
Venue: Council Chamber, Swale House, East Street, Sittingbourne, Kent, ME10 3HT

Membership:

Councillors Mike Baldock, Monique Bonney, Andy Booth, Richard Darby, James Hunt, Gerry Lewin (Chairman), Peter Marchington, Bryan Mulhern (Vice-Chairman) and David Simmons

Quorum = 3

Pages

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Any officers present at the meeting will aid with the evacuation.

It is important that the Chairman is informed of any person attending who is disabled or unable to use the stairs, so that suitable arrangements may be made in the event of an emergency.

2. Apologies for Absence and Confirmation of Substitutes

3. Minutes

To approve the Minutes of the Meeting held on 25 April 2018 (Minute Nos. 628 - 632) as a correct record.

4. Declarations of Interest

Councillors should not act or take decisions in order to gain financial or other material benefits for themselves or their spouse, civil partner or person with whom they are living with as a spouse or civil partner. They must declare and resolve any interests and relationships.

The Chairman will ask Members if they have any interests to declare in respect of items on this agenda, under the following headings:

(a) Disclosable Pecuniary Interests (DPI) under the Localism Act 2011. The nature as well as the existence of any such interest must be declared. After declaring a DPI, the Member must leave the meeting and not take part in the discussion or vote. This applies even if there is provision for public speaking.

(b) Disclosable Non Pecuniary (DNPI) under the Code of Conduct adopted by the Council in May 2012. The nature as well as the existence of any such interest must be declared. After declaring a DNPI interest, the Member may stay, speak and vote on the matter.

(c) Where it is possible that a fair-minded and informed observer, having considered the facts would conclude that there was a real possibility that the Member might be predetermined or biased the Member should declare their predetermination or bias and then leave the room while that item is considered.

Advice to Members: If any Councillor has any doubt about the existence or nature of any DPI or DNPI which he/she may have in any item on this agenda, he/she should seek advice from the Monitoring Officer, the Head of Legal or from other Solicitors in Legal Services as early as possible, and in advance of the Meeting.

Part A Reports for Recommendation to Cabinet

Issued on Monday, 10 September 2018

The reports included in Part I of this agenda can be made available in **alternative formats**. For further information about this service, or to arrange for special facilities to be provided at the meeting, **please contact DEMOCRATIC SERVICES on 01795 417330**. To find out more about the work of the Local Plan Panel, please visit www.swale.gov.uk

Chief Executive, Swale Borough Council,
Swale House, East Street, Sittingbourne, Kent, ME10 3HT

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Local Plan Panel Meeting		Agenda Item: 5
Meeting Date	20th September 2018	
Report Title	Swale Employment Land Review	
Cabinet Member	Cllr Gerry Lewin, Cabinet Member for Planning	
SMT Lead	Emma Wiggins	
Head of Service	James Freeman	
Lead Officers	Gill Harris	
Key Decision	No	
Classification	Open	
Recommendations	1. Recommend to Cabinet that they agree the Employment Land Review as part of the LP evidence base.	

1 Purpose of Report and Executive Summary

1.1 This report outlines the main findings of the Employment Land Review (ELR) – a key part of the Local Plan (LP) evidence base. The ELR provides the evidence for the employment policies and site allocations that will support future economic development in the Borough. Ensuring that Swale allocates enough employment land is important to enable the Local Plan to create sustainable communities, alongside housing and community facilities.

1.2 The study evidences the scale and quality of new land needed to support the Borough's growth over the period of 2016 – 2038 to cover the current and next plan period. It also reviews the quality and quantity of the Borough's existing employment stock.

1.3 As well as planning and economic development officers, the report has had input from the local development industry.

1.4 Members are asked to recommend to Cabinet that they agree the ELR as part of the LP evidence base.

Please note: The consultant will undertake a 15 minute presentation of the main findings with an additional 20 minutes afterwards for Member questions.

2 Background

2.1 The Employment Land Review (ELR) is a technical evidence document that will be used, along with other evidence, to inform the preparation of the Local Plan.

2.2 The purpose of an ELR is to:

- assess the future demand for and supply of employment land;
- to assess the suitability of sites, whether existing, permitted or proposed for future employment land;
- to identify sites which are unlikely to be needed by the market or are now unsustainable for employment development; and
- to help develop appropriate future policies and proposals for strategic planning.

2.3 The focus of the ELR is B class employment (offices, light industry, general industry and storage/distribution), but the report recognises that this is only part of Swale's economy. The report also looks at the visitor economy, the agricultural sector and the energy to waste sector. Retail need is looked at in a separate study which is due to be finalised by the end of the year.

2.4 The report sets out the planning policy context, the current state of the local economy and property market evidence. Property market professionals generally take a short term view of demand and the health of the local economy, so the report balances this with a longer term view informed by data from the economic forecasters and an analysis of past trends.

2.5 The report then reviews all of the stock of employment sites (See Appendix II): existing employment sites, Local Plan allocations, sites submitted though Swale's 'call for sites' and areas of search (which the Council drew up for areas where we felt employment would be suitable.) It also considers two of Swale's significant employment spaces, the Port of Sheerness and Kent Science Park, in more detail.

<u>Main Findings of the ELR</u>

2.6 A number of economic trends were identified through the document which inform the final findings:

2.7 **Resident economy**: The latest official data on unemployment, the July 2018 Claimant Count, shows that the Swale workforce is nearly fully employed. The data for July showed there were 2,475 residents, who were eligible to work, claiming job seekers allowance. The workplace economy is one of the smallest in Kent. However, the Borough grew the stock of jobs from 48,000 in 2000 up to 59,000 in 2016. Employment density is the number of jobs in an area divided by the resident population aged 16-64 in that area. Official 'Employment Density' statistics show that there are only 0.66

workplace jobs in Swale for each working age resident. This is lower than England as a whole (0.85), but higher than several other Kent authorities. The reason for Swale's comparatively low density is that around 10,000 residents (net) commute out of Swale to work.

2.8 The resident economy is therefore reasonably healthy, with low unemployment, albeit marginally above county and national averages. Its main defining characteristics are the comparatively low job density and the 10,000 (net) out commute, albeit these are generally short distance commutes. Resident wages are in line with neighbouring authorities. This suggests there is nothing structurally deficient in the resident economy that the Council, through the LP, needs to address.

2.9 However, this does not mean that there are no pockets of local deprivation that the Council ought to address through wider interventions; including skills and local regeneration.

2.10 **Workplace economy**: By sector, most Swale sectors have outperformed the rest of Kent. Swale's employment strength is in transport and storage; the sector is larger in Swale than the County average, and one that has been growing. The Information and communications sector has experienced strong growth, but the sector is small in size compared to Kent as a whole. In contrast manufacturing jobs are double the County average.

2.11 Traditionally Swale was considered more affordable than Medway or Maidstone for industrial uses but in recent years a lot of the Borough's supply has reduced, increasing rents and bringing them more in line with surrounding areas. Therefore, the Borough is competing for occupiers with those neighbouring areas. Within the sub-regional market, there are footloose occupiers that will take space as and when it becomes available, rather than seek to choose one location over another.

2.12 For offices it is apparent that Swale has a very small market, in comparison to its neighbours. It has however been growing, starting from a comparatively low base of 70,000 sq m in 2000, the stock had risen to 93,000 sq m by 2016. The key office sectors, public and professional services, have grown slightly faster than the County.

<u>Recommendations of the ELR</u>

2.13 The study has concluded that Swale needs an additional 15 ha of **office space**. The report recommends not providing any additional allowance (i.e. additional margin) over this number because there is ample 'headroom' in the plot ratio it has adopted for higher density development to come forward should the market be strong enough to deliver it.

2.14 It has also concluded that 41ha of **industrial and warehouse land** is required, over and above that already planned in the adopted LP. This 41 ha is caveated in that the current planned supply is sufficient to last into the medium term, and it is only towards the end of the 20-year plan period 26ha of the 41ha is required. So the land sought in the next LP does not need to be deliverable in the short or even medium term. Whatever new land is identified needs to be attractive to strategic warehouse sectors. This is in contrast to real market conditions where immediate supply is perceived to be restricted.

2.15 The report notes the importance of the **Port of Sheerness** for Swale's economy and the employment opportunities it provides. Development within the port boundary itself is difficult for Swale BC to directly influence through the planning system as ports are subject to permitted development rights and are allowed to develop within their operational land so long as the development is related to shipping or the transportation of goods inland. However, given the aspirations of Peel Ports, they are likely to require development land outside of their current operational area. The increase of available land for the port is vital to the ongoing success of the area. Imports are forecast to increase to the port and both property and infrastructure within and outside the port boundary will have to be improved to the meet the increased demand. There is an opportunity around the port going forward for industrial space which could be brought forward as part of their wider regeneration plans. Any new industrial space would benefit from being located near to the reconfigured railhead at the Wellmarsh site.

2.16 The report assesses the current use of the **Kent Science Park** and the future options for it. It states that if the Council consider taking this site forward there is scope and technical merit to consider that any new employment land here could form part of the 'normal' land supply and meet 'normal' need; with a Science Park core. A similar approach has been adopted at one of the UKs most successful 'hybrid' sites at Milton Park, Didcot. With a new motorway junction the site would be attractive to the market for a range of employment uses including warehousing, industrial and some offices. The Science Park could also accommodate the office need and part of the industrial and warehousing need. However, the report highlights that there are significant infrastructure issues regarding this site.

2.17 Until recently national policy was drafted in such a way as to discourage Councils from over-allocating land or adopting very aspirational scenarios for employment land. This is because a too high economic target can be misinterpreted to inflate housing numbers. But policy has shifted and economic and housing needs are now disconnected in the new Guidance. The downside to this is that over-allocation could only really be justified where there is evidence that the land identified will meet a different market – in this case a distinct Science Park demand.

2.18 In general, the ELR finds that most of Swale's employment sites remain attractive and suitable for ongoing employment use. For industrial property, this is best evidenced by the very low level of vacancy in the market. While the vacancy rate is so low there is no rationale to proactively release property – even with an allocated pipeline of new supply. However, it recommends that 5 sites should no longer be considered suitable for employment uses and should have a managed release from employment use.

2.19 For office demand vacancy rates are higher, but not so high to suggest that there is an oversupply of property which needs to be addressed by proactively releasing sites from the stock.

2.20 The sites recommended for managed release are:

- BMM Weston, Brent Hill, Faversham (Recommends a Mixed-Use scheme rather than solely employment, which is in line with the allocation in the Faversham Creek Neighbourhood Plan.)
- Queenborough Shipyard, West Street, Queenborough (Recommends a Mixed-Use scheme rather than solely employment, which is in line with the allocation in the Queenborough and Rushenden Masterplan.)
- The Klondyke, Rushenden Road, Queenborough (Recommends managed release which is in line with the residential allocation in the Queenborough and Rushenden Masterplan.)
- Otterham Quay, Upchurch (Recommends managed release due to remote location and relatively poor access. A Prior Notification has been granted on part of the site for office to residential.)
- Former Funton Brickworks, Raspberry Hill Lane, Lower Halstow (Recommends managed release due to remote location and poor access.)

2.21 The report considers that the Public Sector has a role to play in bringing forward the new portfolio of land and property in Swale. However, in practice Council's powers to intervene in the market are limited. The findings of the ELR broadly align with the Swale Economic Development Framework (Swale Regeneration Framework 2018).

2.22 The ELR also reviewed the employment policies within the adopted LP. It states that they are 'sound' but suggests some changes for the next LP. It suggests a suite of polices to manage B classes (and associated Sui Generis) and separate policies to manage other economic land uses.

2.23 The first of these policies should 'set the scene'; outlining that the Council will support the local economy by protecting the existing stock of property and allocating new sites to meet economic needs. This policy should also address strategic objectives around the Port of Sheerness and the Kent Science Park.

2.24 The second should outline how the Council will manage the stock of property and provide development management guidance. It also suggests that the stock of existing land is 'allocated' on the proposal map.

2.25 A new 'loss' policy is recommended which requires applicants to demonstrate that they have tried to market a site before concluding it should be lost. Such a criterion is in line with the NPPF 'reasonable prospects' test and is proportionate.

2.26 Another policy should outline the quantum of new land allocated and that carried into the new plan and provide guidance as to the type of employment expected on each allocated site.

2.27 A new 'rural exceptions' policy is recommended to allow small scale rural development which arises outside the normal plan allocation route. This recognises that rural businesses cannot always foresee their future property needs and make applications for allocations in development plan reviews. Such a policy could assist those sectors outside the traditional employment uses but are important to the rural parts of Swale – including the tourist and leisure economy.

3 Proposals

3.1 Members are asked to agree the ELR as part of the LP evidence base.

4 Alternative Options

4.1 Members could not agree the ELR as part of the LP evidence base. However, this would delay the progress of the LP and leave the Council open to challenge at the Examination stage.

5 Consultation Undertaken or Proposed

5.1 A workshop was held with the business community, developers and key members in November 2017 at the start of the process. The consultant has also liaised with local property agents on current market signals and conditions in Swale and Kent.

6 Implications

Issue	Implications
Corporate Plan	Supports the Council's corporate priorities for a borough and a community to be proud of.
Financial, Resource and Property	Within Local Plan budget.
Legal and Statutory	None anticipated at this time.
Crime and Disorder	None anticipated at this time.
Sustainability	The Local Plan process will be subject to Sustainability Appraisal.
Health and Wellbeing	None at this time.
Risk Management and Health and Safety	None at this time.
Equality and Diversity	The Local Plan process will be subject to a Community Impact Assessments at appropriate points.

7 Appendices

Appendix I: Swale Employment Land Review August 2018

8 Background Papers

8.1 None

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Swale Borough Council

Swale Employment Land Review

Peter Brett Associates
with Aspinall Verdi

August 2018

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Project Ref 42314

	Name	Position	Signature	Date
Prepared by	Andrew Lynch/ Stuart Cook of AV	Associate / Director	AL / SC	24 April 18
Reviewed by	Richard Pestell	Director	RP	04 May 18
Approved by	Richard Pestell	Director	RP	23 Aug 18

For and on behalf of Peter Brett Associates LLP

Revision	Date	Description	Prepared	Reviewed	Approved
1	04 May 18	First full draft	AL/SC	RP	RP
2	6th Aug 18	Second draft	AL/SC	RP	RP
3	24th Aug 18	Third draft	AL	RP	RP

THIS REPORT IS FORMATTED FOR DOUBLE-SIDED PRINTING.

CONTENTS

TABLES

FIGURES

APPENDICES

1 INTRODUCTION

1.1 Swale Council has commenced work to update the evidence base for its forthcoming Local Plan Review. The employment land evidence that underpins the current Local Plan was prepared in 2010, and therefore requires updating.

1.2 This report sets out the findings of a new Employment Land Review (ELR) that will provide the evidence for the employment policies and site allocations in the next Swale Local Plan, and will support future economic development in the Borough.

1.3 Since the last ELR was prepared Swale has lost a number of sites from the employment land supply mainly to housing, and new sites and proposals for employment development have emerged. The Borough has also seen rapid take-up of the remaining land allocated for employment use, driven by demand for warehousing, which has been attracted to the Borough by the combination of the proximity to the strategic road network and the availability of large, accessible and affordable sites.

1.4 The focus of this work is B class employment, but we recognise that this is only part of the economy. In the Swale context the visitor economy is important and considered to be one which can grow, if supported.

1.5 The purpose of the study is to evidence the scale and quality of new land needed to support the Borough's growth over the next plan period - 2022 – 2037/38. 2016 is the base year for the study, and aligns with the most recent set of economic forecast data, the most recent set of County Council monitoring data and Valuation Office Agency (VoA) floorspace data.

1.6 Section 2 of this report sets out the planning policy context for the study. In section 3 we outline the current state of the local economy, before moving on (section 4) to look at the property market evidence. Property market professionals generally take a short term view of demand and the health of the local economy, so we balance this with a longer term view in section 5, informed by data from the economic forecasters and an analysis of past trends.

1.7 In the final two sections we review the stock of sites, existing and new, and propose recommendations to meet business needs going forward.

1.8 Finally, a note of thanks is extended to all those who responded to our consultation requests, and/or those who attended the consultation event in December 2017. The views of the property market agents and developers allowed us to benchmark our data and market understanding.

2 PLANNING POLICY CONTEXT

Introduction

2.1 This section sets the policy context for the study, starting with the newly published national policy context, and then consideration of the Local policy context.

National policy and guidance

National Planning Policy Framework (2018)

2.2 In July 2018 Government published a new NPPF.

2.3 The Government's overarching economic objective for the planning system is to help build a strong, responsive and competitive economy, by ensuring that sufficient land of the right types is available in the right places and at the right time to support growth, innovation and improved productivity; and by identifying and coordinating the provision of infrastructure. (para 8)

2.4 Local Plans should apply a presumption in favour of sustainable development, which means they should: positively seek opportunities to meet the development needs of their area, and be sufficiently flexible to adapt to rapid change (para 11)

2.5 In respect of economic development, as for all other land uses, the guiding principle is that Local Plans should create the conditions for economic growth and productivity improvements. This should take account of local business needs and wider opportunities for development.

2.6 Opportunities are characterised as building on strengths, countering weaknesses and addressing the challenges of the future, and accords with the vision of the Government's Industrial Strategy that looks to improve employment productivity.

2.7 Planning policies should do four things (para 81):

a) *set out a clear economic vision and strategy which positively and proactively encourages sustainable economic growth, having regard to Local Industrial Strategies and other local policies for economic development and regeneration;*

b) *set criteria or identify strategic for local and inward investment to match the strategy and to meet anticipated needs over the plan period;*

c) *seek to address potential barriers to investment, such as inadequate infrastructure, services or housing, or a poor environment; and*

d) *be flexible enough to accommodate needs not anticipated in the plan, allow for new and flexible working practices (such as live-work accommodation), and to enable a rapid response to changes in economic circumstances.*

2.8 The need to identify and make provision for the specific locational requirements of different employment activities is recognised. Specifically, the opportunity for clustering of knowledge and data driven activities and the differing accessibility requirements of different scales of storage and distribution activity.

2.9 The need for support for the rural economy is identified, with policies and decisions enabling (para 83):

a) *the sustainable growth and expansion of all types of business in rural areas, both through conversion of existing buildings and well-designed new buildings;*

b) *the development and diversification of agricultural and other land-based rural businesses;*

c) *sustainable rural tourism and leisure developments which respect the character of the countryside; and*

d) *the retention and development of accessible local services and community facilities, such as local shops, meeting places, sports venues, open space, cultural buildings, public houses and places of worship*

2.10 That business needs may need to be met beyond settlement boundaries is acknowledged, and the need for such development to be sensitive to its surroundings, acceptable in its accessibility impact, brownfield if possible and as well related to existing settlements are all identified as key considerations.

2.11 Plans should be prepared positively, being both aspirational but also deliverable. Plans must include strategic and non-strategic policies. Strategic policies can extend beyond a single Local Plan area, and should set out an overall strategy for the pattern, scale and quality of inter alia employment development, making sufficient provision of land to accommodate the need. Strategic policies should look ahead over a minimum 15-year period from adoption, to anticipate and respond to long-term requirements and opportunities, such as those arising from infrastructure improvements.

2.12 In terms of land allocations, the Framework states:

2.13 Broad locations for development should be indicated on a key diagram, and land use designations and allocations identified on a policies map. Strategic policies should provide a clear strategy for bringing sufficient land forward, and at a sufficient rate, to address objectively assessed needs over the plan period, in line with the presumption in favour of sustainable development (para 23)

2.14 In ensuring that the Local Plan is positively prepared the Framework highlights the importance of maintaining effective cooperation and collaboration on cross-boundary strategic issues between Local Authorities and other prescribed bodies such as the LEP. Two particular areas are highlighted – future infrastructure requirements and whether development needs that cannot be met in full in one area can be accommodated in another area

2.15 Non-strategic policies can include site allocations as well as development management policies.

2.16 Policies should be underpinned by relevant, proportionate and up-to-date evidence, taking into account relevant market signals. Policies should be reviewed to see if they need updating at least once every five years, taking into account changing local circumstances or changes to national policy.

2.17 Planning policies should promote the effective use of land in meeting the objectively assessed needs for various types of uses, and in particular the use of brownfield land and under-utilised land and buildings (Section 11).

2.18 Regular reviews should be undertaken of land allocations and land availability to take account of the demand for land. Where it is considered there is *no reasonable prospect of an application coming forward* the land should be re or deallocated, and prior to the Plan update, applications for alternative uses should be supported where this would help meet an unmet need.

2.19 Under the guise of making effective use of land the Framework advises Local Authorities to take a positive approach to applications for alternative uses on land that is currently developed but not allocated (para 121). This is particularly relevant in areas of high housing demand. The approach does come with the proviso that in so doing this does not undermine key economic sectors or sites.

Planning Practice Guidance

2.20 The Guidance on housing and economic needs assessments was deleted when the NPPF was published. This was mainly because the approach to housing is very different between the NPPF 2012 and 2018 versions.

2.21 At the moment, the guidance has only partly been reissued and further amendments are expected 'in due course'. However, we don't expect the new guidance to have a significant bearing on how studies such as this are undertaken but this needs to be kept under review.

Conclusions on National Policy

2.22 Our view the revised NPPF does not introduce any significant changes to how the Council should plan for its economic needs. As with NPPF 2012 the Council is still required to regularly review sites, plan to meet economic needs in full and demonstrate that allocated sites have a 'reasonable' prospect of coming forward for development. No method for deriving economic needs and addressing them in development plans has been set out in the PPG, and we continue to largely rely on established practice.

2.23 There are however a small number of areas where policy has changed we would briefly highlight.

2.24 Firstly, the deletion of the Functional Economic Market Area (and the Housing Market Area) as a policy concept. Both these geographies are deleted – although for Swale as a self-contained market area this is less relevant than other councils. However, without guidance there remains uncertainly over how any 'unmet' need should be addressed between neighbouring councils.

2.25 Secondly paragraph 121 of the new NPPF makes it easier for 'unallocated' sites to be lost to housing. This may suggest that the Council needs to formally 'allocate' more land so that the Council has increased control over its stock of sites. At the moment, some existing sites are not 'allocated' on the proposal map and the Council relies on a list of 'Strategic Sites'. The Council ought to consider reviewing this and bringing more of the sites we have assessed in this report into some form of 'allocation'.

2.26 Lastly; there is national policy thrust to make all viability evidence publicly available. While the main focus is on planning contributions (and affordable housing) viability evidence has a role to play when applicants seek to release sites from employment use. As part of the 'reasonable' prospect tests it is generally considered proportionate to request evidence of marketing of land or buildings and also viability evidence to support the applicant's case. It is also the case than many mixed-use sites rely on some form of internal cross subsidy between the homes and commercial elements. The move to more open and accessible viability evidence should be welcomed.

2.27 Although not explicitly related to employment land needs the new NPPF does promote 'exception' rural housing sites. This reflects the difficulty traditional plan making has with estimating very local needs and proactively allocating land. The same logic could be extended to small rural employment sites. Traditional development plans struggle to pre-empt the needs of rural firms and make appropriate land allocations to match.

Strategic Warehousing

2.28 In broad terms storage and distribution functions on two levels, that have different and distinct markets and property requirements. At the local level there is storage and distribution activity that serves residents and businesses in the local area. Premises for this activity tend to be near their market, typically for 'last mile' van/small lorry type delivery, and can be accommodated in small to medium sized units. Economic forecasts of labour demand will be aware of this activity in their forecasts because it is locally generated and related to the size and structure of the local population. But storage and distribution also operates on a sub-regional level, where the model is a central hub using large vehicles to deliver to the 'last mile' delivery points.

2.29 These larger units tend to be footloose and follow land supply and strategic road routes. The location where a logistics firm operates from reflects the trade-off between land costs (and availability) and transport costs. While sites adjacent to motorways are the traditional locations for this type of activity; where land is expensive or simply not available, these uses will find other locations. For the Local Plan it is very difficult to establish the local need for land to meet this type of sub-regional demand. But collectively meeting the need for larger warehouses is still important for the health of the regional and national economy.

2.30 In recent years Swale has successfully attracted a number of strategic warehouses, and whilst small in number, they have a very large land take.

2.31 Strategic warehouse demand is a departure from longer term trends, because historically it has not been attracted to Swale. A very large proportion of the demand is to supply London, and Kent is on the edge of the South East, and until more recently London was served by locations further in with large warehouses traditionally preferring areas with better accessibility. However, the regional market for warehousing land is exceptionally tight, and occupiers are compromising on less accessible locations and/or locations further out. Swale, and particularly the well-connected western parts of the Borough has benefited from this displaced demand.

2.32 For our work we don't see the regional supply loosening any time soon. So if Swale is able and willing to identify new sites for this market, it is quite likely to attract demand.

Local Policies

2.33 The Swale Local Plan was adopted in 2017 making it one of the most recent and up to date plans in England. When adopted the plan was subject to a 5-year review but this is now a requirement of all plans. So in this regard the Swale Plan is not exceptional.

2.34 The main economic policy is CP 1 *"Building a strong, competitive economy".* The policy is long - extending to a whole page and 14 numbered polices (some with further sub policies). We don't repeat the policy here – partly because it is so comprehensive but also because it relies on extensive supporting text to further refine, define and identify the land controlled in the policy.

2.35 The policy, as drafted, states economic objectives, some development management actions (policies) and some general statements for the wider economy including tourism, agriculture and education.

2.36 No positive targets are set in CP 1 but the policies provide support for almost all economic uses; with a specific objective to stem losses of manufacturing jobs and /or floorspace, uplifting the tourist sector and promoting science and pharmaceutical sectors. This latter point is related to the Science Park which has its own policy (Regen 4).

2.37 The Science Park policy (Regen 4), while generally supportive, is currently drafted in a negative way. This is because the location of the site (with poor road access) restricts how much the site can grow. Without a new strategic access route, the site is effectively constrained and net additional jobs are strictly controlled.

2.38 For day to day planning decisions CP1, policy 5 protects / safeguards a network of "Existing Strategic Employment Sites". These are named in the text although not identified on the proposal map. Paragraph 5.1.11 amplifies the policy with development management advice which includes the need for proposals seeking an alternative use to provide evidence of *"wider, fundamental and deep seated structural problems with the site, rather than shorter term difficulties caused by a particular economic context".*

2.39 New land to be allocated for economic uses is provided in the 'Regen' policies or the 'A' policies with each allocation identified on the map and supporting text outlining what may be expected to come forward in each area.

2.40 Where land is allocated for economic uses we consider it as part of the supply later in this report. In our conclusions chapter we provide guidance on how the current suite of policies could be improved in the next plan.

3 THE LOCAL ECONOMY

Introduction

3.1 We start our analysis with a brief review of the resident economy in Swale. This is useful because it shows whether intervention or correction is currently needed. If there is something structurally wrong in the resident economy, this could be corrected by, for example, over providing employment land in the local area to facilitate the delivery of non-planning interventions to boost the number (or type of jobs) in the local economy.

Resident economy

3.2 Swale is one of the largest districts in Kent, with a population of 146,000 people, which is only marginally smaller than Maidstone and Canterbury.

3.3 The latest official data on unemployment, the July 2018 Claimant Count, shows that the workforce is nearly fully employed. The data for June showed there were 2,475 residents claiming out of work benefits[1]. Just 2.8% of the 16-64 population were out of work and claiming, which is a proportion a little above the average for Kent (1.9%) and for GB (2.2%), but relatively low in the context of past rates.

3.4 Kent County Council has looked in more detail at the age profile of unemployment in the County and south east[2]. This suggests that the slightly higher than South East unemployment rate in Kent is related to younger aged people. They found that unemployment in the 18-24 age groups in Kent was higher than elsewhere. Swale recorded the third highest unemployment rate in the South East. But in context, the rates are still very low (4.5% in Swale), representing a small number of people.

3.5 What this suggests is that there is very little quantitative ‘slack’ in the local labour supply. This is slack that could be used to justify a growth in jobs over and above that needed to support population (and household) growth. What labour slack is available is disproportionately at the younger ages – so much more likely to be lower skilled (less experienced) work.

3.6 Looking at more qualitative aspects of the resident economy, resident based wages are very similar to the Kent and UK averages. There is no suggestion in the data that residents are worse off than these comparators.

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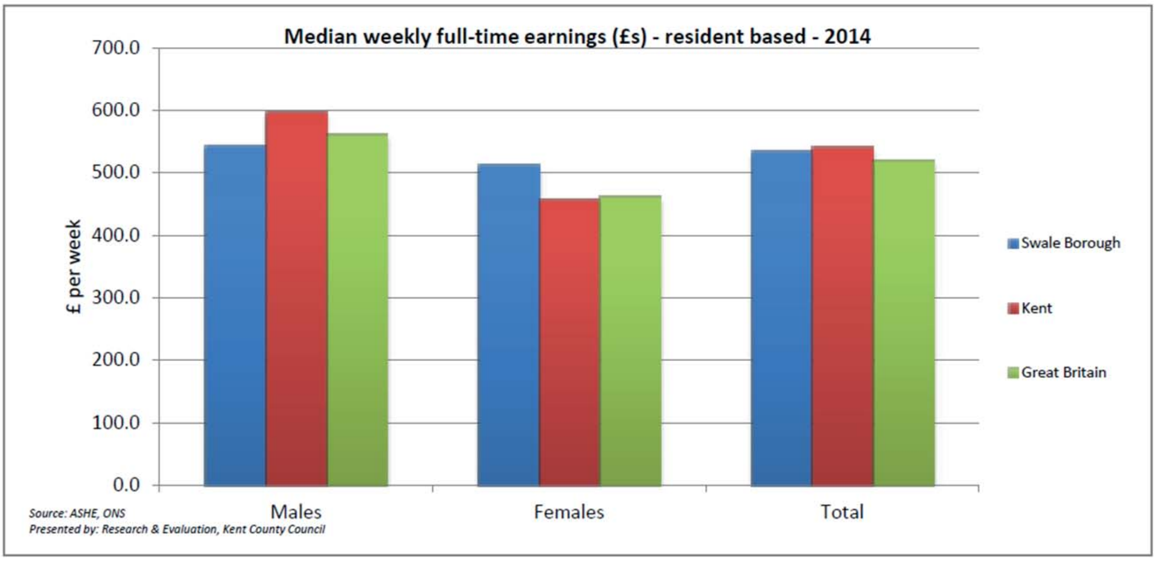
[1] 1. This experimental Claimant Count series includes Jobseeker's Allowance (JSA) and some Universal Credit claimants.

[2] https://www.kent.gov.uk/__data/assets/pdf_file/0019/8182/District-unemployment-bulletin.pdf updated 17th July 2018

Figure 3.1 Resident Based Wages



Source: ONS

3.7 Although unemployment is low, and wages in line with norms, the Borough has comparably few local jobs. The workplace economy, which we discuss in more detail in the next section, is one of the smallest on Kent. The Borough accommodated only 60,000 jobs in 2016.

3.8 Swale's workforce is considerably less skilled compared to other areas. The proportion of the workforce with skills at NVQ4 or above is 22.6%, which is well below the 33.6% average for Kent, and getting on for just half the average for the South East and GB (41.4% and 38.6%)[3].

3.9 Official 'Employment Density' statistics show that there are only 0.66 workplace jobs in Swale for each working age resident. This is lower than England as a whole (0.85), but higher than several other Kent authorities. The reason for Swale's comparatively low density is that as we see in Figure 3.2 below around 10,000 residents (net) commute out of Swale to work (ie the difference between total in and out flows).

Table 3.1 Employment Densities in Eastern Kent - 2015

local authority: district / unitary	Total jobs	Jobs density
Ashford	67,000	0.89
Canterbury	78,000	0.76
Dover	40,000	0.59
Maidstone	90,000	0.89
Medway	101,000	0.57
Shepway	47,000	0.73
Swale	58,000	0.66
Thanet	48,000	0.59
Tonbridge and Malling	67,000	0.87
Column Total	**596,000**	**0.71**

[3] Source: NOMIS - ONS annual population survey, latest data Dec 2017

Source: ONS / Neighbourhood Statistics

3.10 For planning evidence bases and policy-making, commuting is a challenging topic. The planning system alone cannot change or amend flows, they are the product of market economics and demand. In Swale's case we know that the imbalance is a product of demand because the Council has, in previous plans, provided a supply of employment land for offices, industrial and warehouses. So the imbalance is not simply a product of a constrained land supply in Swale.

3.11 If we could amend commuting flows this would raise Duty to Co-operate issues and could introduce inconsistencies between development plans. These 10,000 residents (net) form part of another planning authority's workplace economy.

3.12 A more nuanced look at commuting considers destination and how far residents commute. Data from the Census (see Figure 3.2 below) shows that a large share of the net imbalance (the higher commuting out) relates to London. This is not generally seen as a negative finding, and effects almost all district's in the area.

3.13 With both Sittingbourne and Faversham connected by high speed rail it is not surprising that this facilitates significant commuting flows into Central London attracted by the much higher workplace wages than are now or could be expected to be available in the future in Swale. So, this flow into London will remain as it does for all areas within the commuting arc around London, and without a significant shift in the pattern and quality of local employment it is unlikely that the Borough could ever reduce this flow.

3.14 Aside from London commuting, the Census shows that almost all commuting is very short distance. Into one of the immediately adjoining local authorities. For Swale residents this is perfectly logical and (reasonably) sustainable. For example, a Faversham resident who works outside the town, may commute into Canterbury that is equidistant to Sittingbourne and closer than Sheerness. But commuting to Sittingbourne is classed as internal to the Borough, whereas the same distance to Canterbury is an external commute. The only other exception to this largely short distance pattern is trips to Tonbridge and Malling, which is likely to relate to commuting to the Kings Hill Business Park, home to over 200 businesses and just a 40-45-minute drive from Sittingbourne.

Figure 3.2 Commuting flows – into/out of Swale

Summary

3.15 The resident economy is reasonably healthy, with low unemployment, albeit marginally above county and national averages. Its main defining characteristics are the comparatively low job density and the 10,000 (net) out commute, albeit these are generally short distance commutes. Resident wages are in line with neighbouring authorities.

3.16 So this analysis suggests there is nothing structurally deficient in the resident economy that the Council, through the development plan, needs to address.

3.17 However – this does not mean that there are no pockets of local deprivation that the Council ought to address through wider interventions; including skills and local regeneration.

Workplace economy

3.18 In this section we review the workplace economy of Swale. The resident and workplace economy are not always the same because many people, as discussed above, commute across administrative boundaries.

Job change

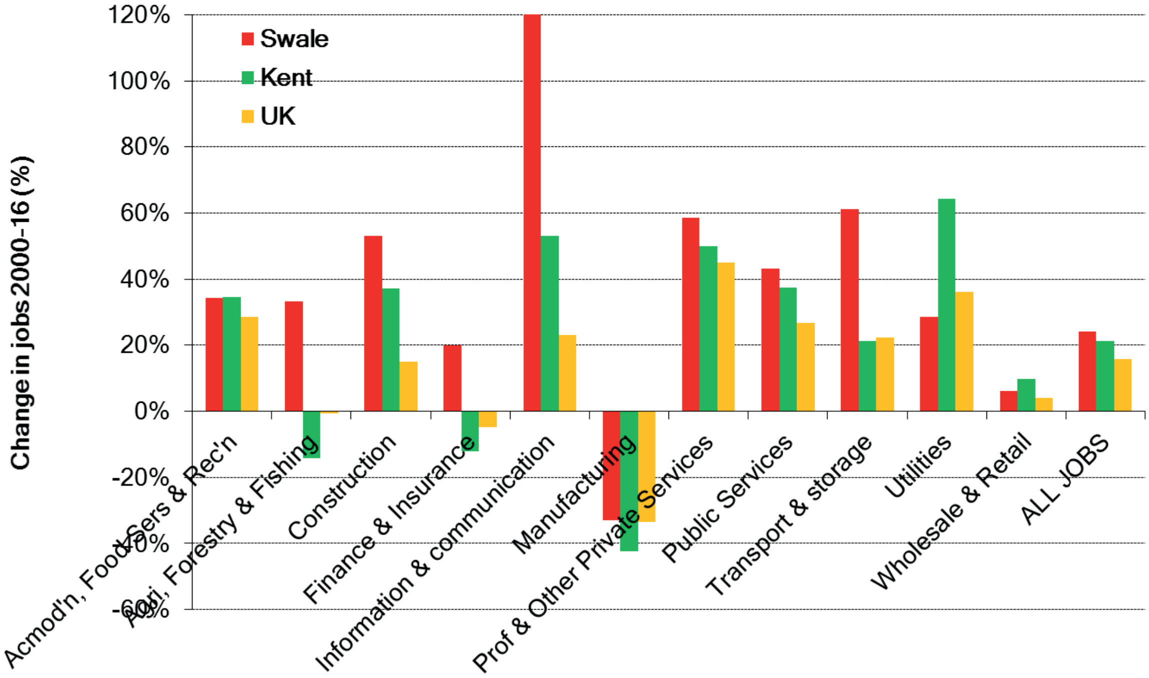
3.19 The chart below shows how the workplace economy of the Borough has changed in recent years. Swale has grown its economy faster than the County and UK as a whole; but only marginally. The Borough grew the stock of jobs from 48,000 in 2000 up to 59,000 in 2016.

3.20 By sector; most Swale sectors have outperformed the County. Manufacturing has declined (as would be expected) but this has been offset by faster growth in

Transport and Storage (related to warehouses) and construction. Information and Communication has shown very strong growth but is a small sector; growing from a small base. The key office sectors; public and professional services, have grown slightly faster than the County.

3.21 The data needs to be read alongside Table 3.2 and Figure 3.4 – which show the size of each sector (in 2016), and how Swale sectors compare in scale to the county average.

Figure 3.3 Job change 2000-2016 (percentage)



Source: Experian and PBA analysis

Table 3.2 Swale workforce jobs 2016 ('000s)

BROAD JOB SECTORS	Jobs
Accommodation, Food Services & Recreation	4.70
Agriculture, Forestry & Fishing	1.60
Construction	5.20
Extraction & Mining	0.00
Finance & Insurance	0.60
Information & communication	1.10
Manufacturing	6.90
Professional & Other Private Services	10.30
Public Services	13.60
Transport & storage	5.80
Utilities	0.90
Wholesale & Retail	8.50
ALL JOBS	**59.20**

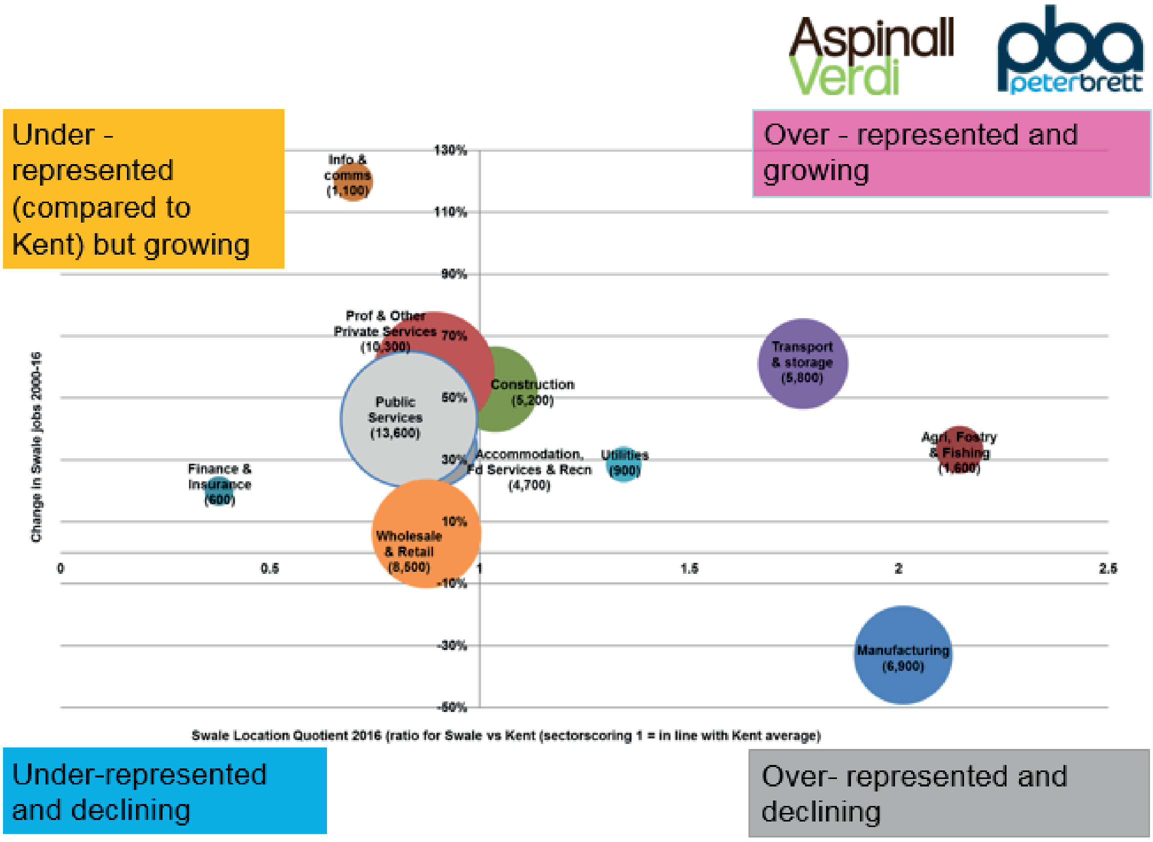
Source: Experian

3.22 The chart below compares the Borough's sectors with the County, identifying which sectors are comparatively strong (more jobs) and weak (less jobs), and also which sectors are growing or shrinking.

3.23 It shows a local strength in transport and storage (an important B class sector); the sector is larger in Swale than the County average, and one that has been growing. The Information and communications sector (also important B class sector) has experienced strong growth, but the chart highlights the sector's relative small size in Swale compared to Kent as a whole. In contrast manufacturing jobs are double the County average, but are the only one of these broad sectors that has declined since 2016.

3.24 The largest professional and public services sector is slightly smaller (less than 1.0) than the County average.

Figure 3.4 Swale Business Strengths



3.25 Given the population is nearly fully employed the data indicates that in order for Swale to do better in any of these sectors, to move closer to the Kent average, then this can only be secured either at the expense of other sectors or by growing the labour supply.

Job change by B class sector

3.26 The Council cannot control or plan using the job change information in this sector based format, and needs job and floorspace change forecasts for the B class land uses - offices, industrial and warehousing space. The table below groups the sectors discussed above into the B class sectors using PBA's sector to land use 'mapping' technique (the method is explained at Appendix A).

3.27 The change in B class jobs to 2016 has been particularly strong in office based jobs, moderately strong in warehousing, which collectively outweigh the losses of industrial jobs at an almost 2:1 ratio. As we see in just about everywhere the change in B class jobs in the past has been far exceeded by the growth in non-B class jobs.

Table 3.3 Swale job numbers 2000 and 2016, and change

	2000	2016	Change	
Office (B1a)	4,891	8,108	3,216	66%
Industrial (B1b, B1c & B2)	14,645	11,831	-2,814	-19%
Warehousing (B8)	5,520	7,257	1,738	31%
All B class	**25,056**	**27,196**	**2,140**	**9%**
Non-B class	*22,744*	*31,604*	*8,860*	*39%*
All Jobs	**47,800**	**58,800**	**11,000**	**23%**

Source: Experian & PBA

Floorspace change

3.28 The data in the two figures below reports the change in floorspace calculated from taxation data (source: Valuation Office Agency), and compares Swale against the neighbouring authorities.

Offices

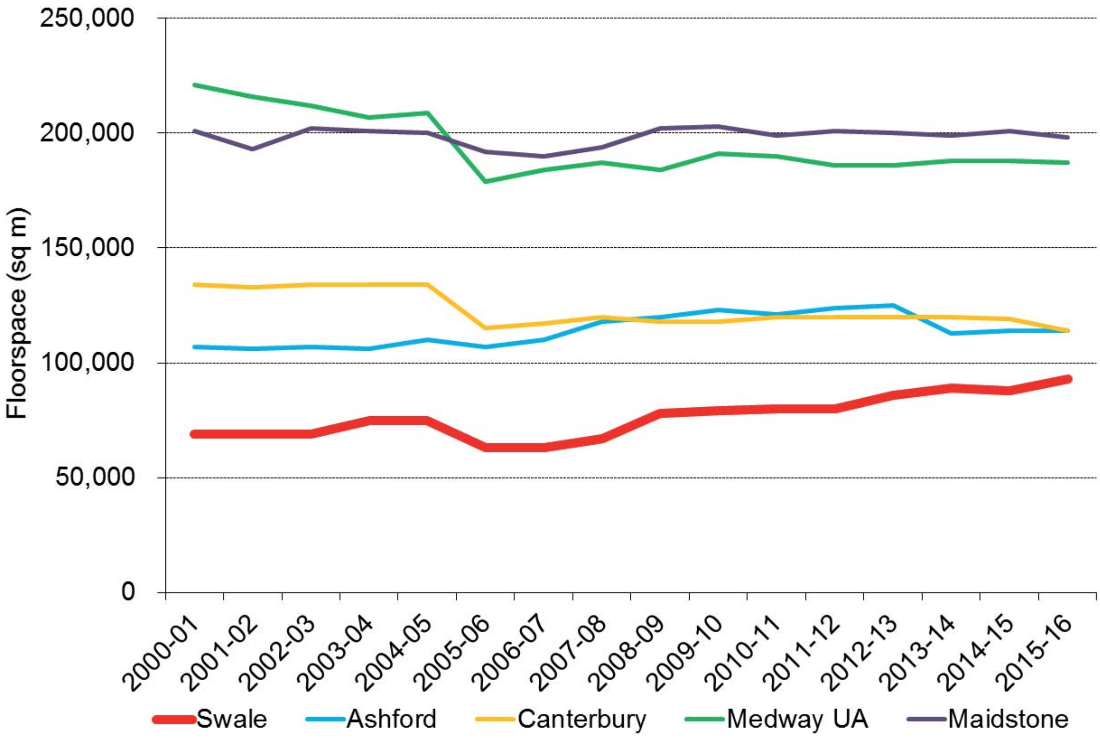
3.29 For offices it is very apparent that the Borough has a very small market, in comparison to its neighbours. It has however been growing, starting from a comparatively low base of 70,000 sq m in 2000, the stock had risen to 93,000 sq m by 2016 (latest VoA data available). This is faster growth than the neighbouring authorities. This floorspace data accords with the jobs based data referred to above that shows key office sectors growing faster than the County as a whole, but the amount of office floorspace remains below the County average.

3.30 Whilst there has been growth in the overall quantum of office floorspace, allocated site opportunities to substantially expand the office provision through s have not been fully taken up. For example, the original plans for the Watermark office allocation at The Meads neighbourhood in Sittingbourne close to the A249, was for 22,000 sq m. However, the scheme built-out in 2008 was much smaller at just 5,250 sq m, and the remaining land, originally allocated for office, did not get taken up, and has now been developed for housing.

3.31 Office losses to residential loss through the relaxation of the permitted development regulations have been relatively light, with a couple of prior notification cases in Faversham and one larger scheme at Otterham Quay. Whilst until very recently there had been little PN activity in Sittingbourne, a notification is currently under consideration for Prior Approval for a large office building on London Road, within the town centre.

3.32 One interesting point to note is that office job growth (66% between 2000-2016) has outstripped floorspace growth (33%). The most likely reason for this is that employment densities have tightened over time; firms are making much better use of their space. In the last 15 years or so, offices have changed, many have moved towards paperless offices and the introduction of flat screen monitors means that firms have been able to introduce much more efficient layouts. So the national (and local) economy has been able to add employment growth without co-corresponding floorspace (increasing office worker space densities).

Figure 3.5 Floorspace Change - Offices



Source: VOA

Industrial

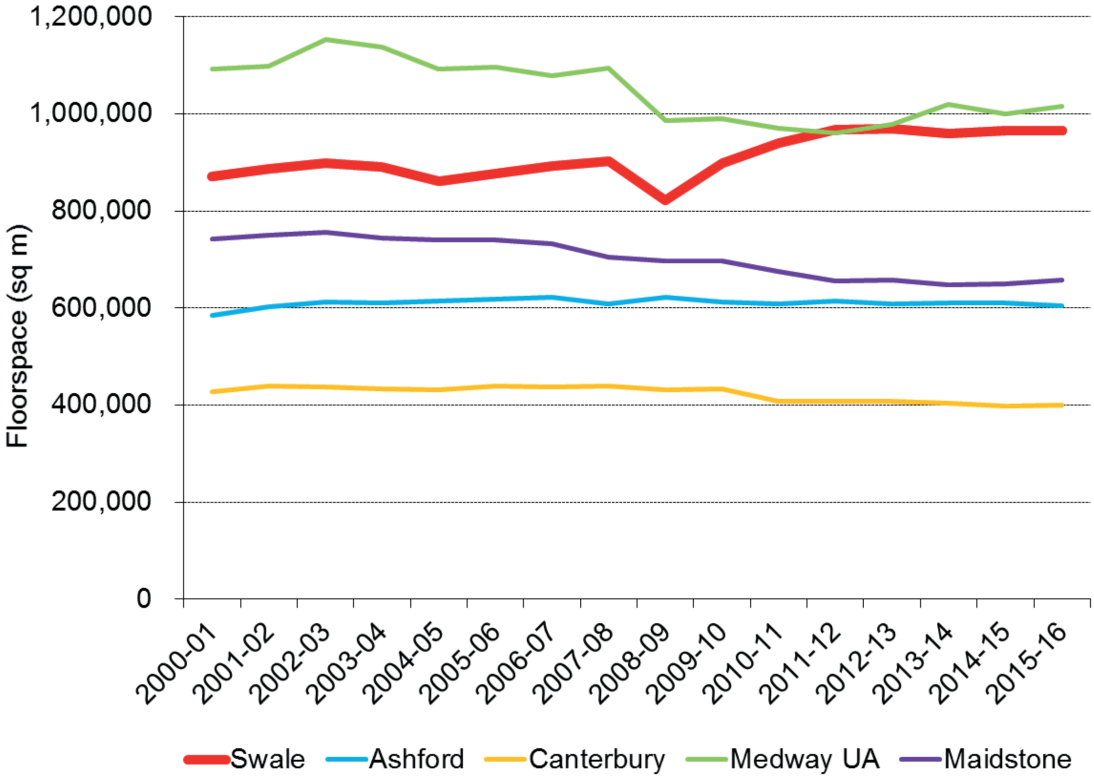
3.33 The chart below shows similar data, but for industrial floorspace. The VOA group industrial and warehousing floorspace; so we cannot tell whether it is distribution space growing or manufacturing.

3.34 The most obvious headline point is that the size of the sector is much larger than offices. There is over 10 times the quantity of industrial floorspace in the Borough compared to offices. Swale is also the only Borough to have grown its stock of space.

3.35 As a note of caution; the VOA is considered one of the most accurate sources of data given it is driven by taxation data. But it is subject to periodic reviews (revaluation years) and this can result in unstable year by year data. However, in Swale's case the marked increase in industrial stock around the late 2000's is very likely to be related to the completion of the very large Morrison's distribution warehouse. Data from Kent County shows a one off gain in the 2008/09 year of 100,000 sq m of new additional B8 space.

3.36 Contrary to offices, where we saw employment densities tighten over the period (as firms used their space more efficiently), for industrial uses densities have slackened. The industrial and warehousing sectors combined employ fewer people than in 2000. But floorspace has grown. The likely reason is the balance of industrial jobs between manufacturing and warehouses employment has shifted more towards the latter, albeit there remains more jobs in the former. In general, very large warehouses employ one worker for every 90 sq m of space, whereas the job: space ratio for manufacturing is at best only half of this. We know that warehousing related employment has grown in Swale, and this has a disproportionate effect on the stock of floorspace.

Figure 3.6 Industrial Stock Change



Source: VOA

Summary

3.37 The Swale workplace economy has experienced strong growth in recent years. The office economy, in terms of jobs and floorspace has outperformed the County, but remains smaller than many neighbouring authorities. The data suggests that much of this office employment change has been ‘spaceless’ – in that firms have made more efficient use of their existing stock of space, as opposed to taking new.

3.38 For industrial sectors, when manufacturing and warehousing are considered together the sector has declined in terms of jobs – although only by 1,000 jobs (just 5% of all industrial jobs) over the 16-year period. The stock of industrial floorspace has grown steadily over the period since the financial crisis, and this is most likely to be a product of a shift from manufacturing towards warehousing and logistics that utilise lower space to employee densities.

4 THE COMMERCIAL PROPERTY MARKET

Introduction

Overview

4.1 This chapter reviews the property market for general employment space in the Borough of Swale, covering office, general industrial and strategic distribution space. In addition, consideration is given to the two particular employment areas - Kent Science Park and Sheerness Port.

4.2 For general industrial, strategic distribution and office space we consider in turn demand, supply and the balance of the market. We research the science park market to understand how this functions to allow for analysis of the Kent Science Park. Research in also undertaken on the port area to assess the scope of future development of the area.

4.3 The main purpose of the analysis is to identify where there is potential demand for new floorspace, and hence a need for development land to be identified in the emerging plan.

4.4 In relation to demand, we identify the types of business that are taking space in the Borough or may consider doing so, and what property they are looking for in terms of size and quality. In relation to supply and market balance, we analyse the stock which is currently available, recently developed and in the pipeline, and the rental values and capital values that properties in the area are achieving. The purpose of our analysis is to determine:

- How far the existing floorspace stock is meeting current and foreseeable occupier requirements;
- Hence, how far there is likely to be demand for more or different space, now or in the future;
- Conversely, if property and land are oversupplied, overall or in particular sections of the market.

4.5 These findings help assess the potential demand for new employment floorspace, and hence the quantity and qualitative mix of development sites that the new Local Plan should identify for employment uses.

4.6 A strength of the market-facing analysis is that it considers real-life property transactions, including the values (rents and prices) realised in such transactions, and whether these values are enough to support viable development. This provides evidence of effective, or viable, demand – which means that potential occupiers will pay enough, and (where relevant) provide sufficient covenant strength[4], to support financially viable development. This is important because only sites that are viable will be delivered in practice, and in line with national planning policy Local Plans should identify for employment only sites that are likely to be delivered for that use. Thus, the National Planning Policy Framework advises that plans should be deliverable (para

[4] A business tenant has strong covenant if there is good evidence that they will be in good financial health, and able to pay the rent, through the period of the tenancy.

173) and planning should avoid safeguarding employment sites that have no reasonable prospect of being used for that purpose (para 22).

Sources and definitions

4.7 Our property market research has drawn on three main sources:

- We have relied on the property market database Estates Gazette Interactive (EGi) and commercial property research reports for evidence of take-up, availability and values, both for the market overall and individual properties.
- Total stock figures have been derived from analysis of Valuation Office Agency (VOA) data on business rate assessments. We have cross-referenced this data with the EGi data to provide an indication of vacancy rates. Cross referencing the EGi and VOA data does have limitations as the sources are different therefore not guaranteeing the description on unit type or size being the same. The reason why there may be discrepancies with the unit type is that the VOA data has 117 description codes, of which we have used 24 in our analysis. Whereas agents may list property on EGi for industrial or office purposes that do not fall in the VOA categories that we have used in our analysis. Part of the reason the size data may not correlate is that the EGi may provide a total floor area for a single building whereas VOA may list this into various suites, and vice versa. Due to the volume of data it has not been possible to "iron out" these discrepancies.
- For greater qualitative understanding of the market, we have consulted extensively with agents, developers and investors active in Swale and surrounding areas. The consultation has been by telephone and at a stakeholder workshop hosted by the Borough Council. A list of attendees at the stakeholder event is contained in Appendix B.

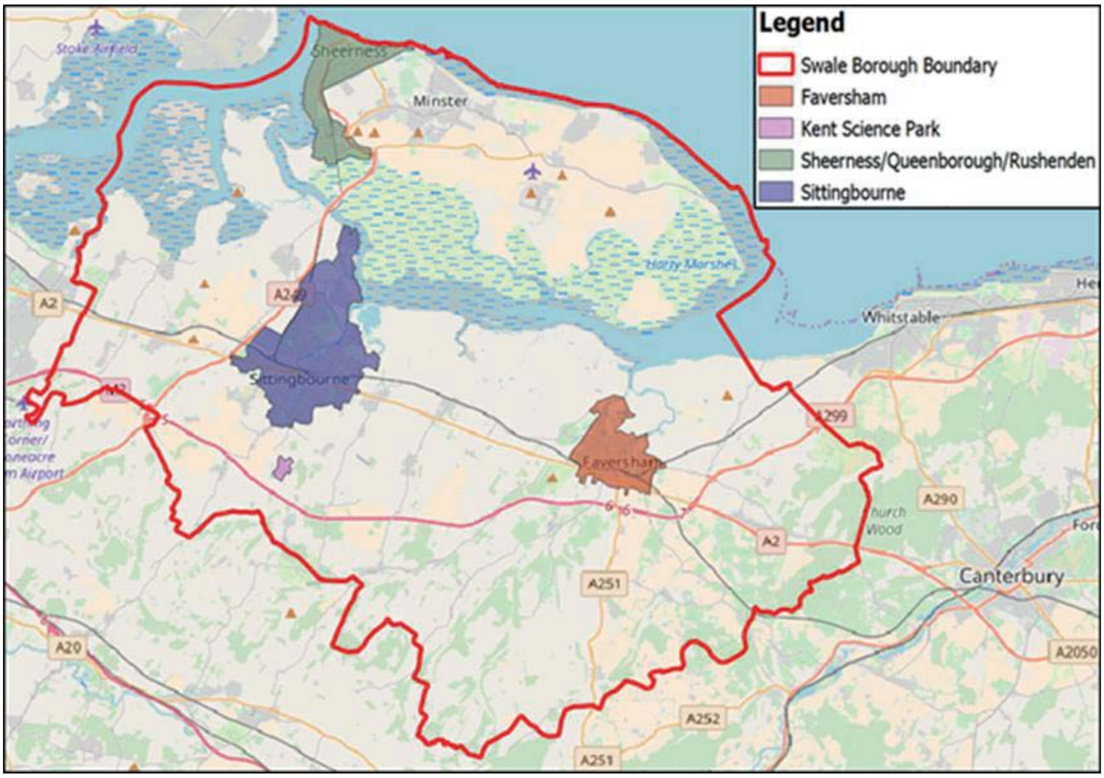
4.8 The main market indicators we have considered are rental and capital values, recent take-up and floorspace availability (vacancy). In a property market context, 'take-up' means the occupation of business floorspace. Take-up covers both new-build and second-hand space (second-hand being the larger share of the market). When we consider availability, we consider all space being currently marketed. This covers both new and second-hand space.

4.9 In this study, we make reference to five different property market areas, defined as:

- Faversham – the extent of the urban area of Faversham
- Sittingbourne – the extent of the urban area of Sittingbourne. This includes; Kemsley and Ridham.
- Sheerness/Queenborough/Rushenden – extent of the urban area of Sheerness and Queenborough/ Rushenden. The boundary of the port is included in this area, but is discussed in a separate chapter.
- Kent Science Park (KSP) – the extent of the existing KSP site, and the planning permission for a 4-ha expansion.
- Rural Swale – the rest of the Borough excluding the above geographical areas

4.10 The boundaries of the above mentioned areas are shown in Figure 4.1. The map highlights Sheerness/ Queenborough including the port. Rural Swale is the area contained within the redline boundary excluding, Faversham, Sittingbourne, Sheerness/ Queenborough and the KSP.

Figure 4.1 The property market areas within Swale



Source: Ordnance Survey, Open Street Map & AspinallVerdi (2017)

Background

4.11 Swale benefits from the M2 motorway, which runs east to west through the southern part of the Borough, connecting into the motorway network east of London and into London via the A2. Other major roads are the A2, also connecting east to west through the Borough; and the A249 running north to south, connecting the Isle of Sheppey to the main land, and linking to M20 in the west and access to the Channel ports.

Figure 4.2 Swale Borough in context

Source: Google Maps (2017)

4.12 Since the global economic crisis, the London property market (across most sectors, especially residential) has experienced strong growth; placing pressure on the land supply in the capital and in the South east more generally. With the government's principle for brownfield first development and disparity between residential values and other uses, this has led to a significant amount of industrial land being lost across the capital. During this period of losing land, the industrial and distribution market has experienced growth which has led to a market imbalance. As a result, occupiers are compromising on space or seeking to move further out of London to satisfy their requirements.

4.13 Kent is an attractive place for both general industrial and distribution occupiers to locate. Most parts of Swale are within 2 hr HGV drive time to London, which is attractive to both smaller local occupiers and large blue-chip occupiers.

4.14 Swale was traditionally seen as an affordable location, but in recent years, like most of London's fringe locations, it has seen an increase in activity in the general industrial and distribution sector. This has put pressure on existing commercial property stock; decreasing vacancy and pushing up rents. Although Swale has been proactive in allocating land for employment uses, increase in demand has meant a lot of this land has already been developed and the current supply of land is less than it was in the past.

4.15 Swale is one of the few areas in the country to benefit from an operational major port, with the Port of Sheerness specialising in car importing and forestry products. The Port is one of the main employers on the Isle of Sheppey, and also sustains other industrial port related activities. Sites located in the port authority boundary have permitted development rights if used for port related uses. Because of the specialist port-related use of land within the Port's control, we do not include such land in the land supply analysis made later on in this report.

4.16 The Borough has a largely self-contained office market, with the majority of office workers commuting into London; both Sittingbourne and Faversham benefit from having a direct High Speed rail-1 (HS1) train link meaning journey times from London are 54 mins to Sittingbourne and 1 hour 3 mins to Faversham. When HS1 initially opened it was tipped to be a stimulus to the office market in the area, as workers could easily commute from further afield. HS1 has failed to have the impact that some hoped and the office market is still small in the area.

4.17 Investors and occupiers alike perceive that there is a geographic distinction in the Borough. Agents and stakeholders report that there is a market divide; with Sheerness, the Isle of Sheppey and Sittingbourne considered to be the north Kent market, and Faversham to be considered east Kent. There is market perception that locations in north Kent are generally more attractive to investors and occupiers as they are closer to the M25 and London.

London influence

4.18 For office demand there is no real London influence. As noted above HS1 has largely failed to act as an office market stimulus and instead made it easier for office workers to commute into London using the high speed line. This may change over time but should the market improve other Council areas, closer to London, are eager to attract this demand. The most obvious candidate is at Ebbsfleet where land has been allocated for 32,000 new jobs, trains are more frequent and less expensive than in Swale. Any London office demand which is displaced along HS1 is unlikely to reach Swale.

4.19 For industrial demand Swale may pick up a small London premium but it is generally too far from the Capital to efficiently service London's day to day needs. So while London is chronically short of industrial land the two hour round trip (with good traffic) between Sittingbourne and Bromley (for example) means that land in Swale is not an adequate substitute. Instead smaller firms will pay much higher rents closer to London where their travel time is much less. However, should the London market continue to tighten demand may 'ripple' further outwards. But as with offices there are other possible candidate areas closer to London willing and able to pick up displaced demand.

4.20 The exception to this weak London related demand is Swale's role as a regional distribution hub. Larger distribution warehouses need large amounts of land on single plots with good strategic road access. This quality of land is exceptionally difficult to find in London or the nearby Greenbelt council areas. Coupled with the lower land values in Swale this means that the Borough is attracting London related demand. A warehouse in Swale can access the London market while also servicing Kent and neighbouring Counties. We return to this demand later in the report although here we note that it is almost impossible to quantify how much of this demand could be attracted to Swale because this type of operator demand is infrequent and normally has an area of search extending across several Counties.

The industrial market

Introduction

4.21 Our analysis below splits the industrial market:

- General industrial uses – including production space (factories and workshops) also small to medium-sized warehousing (B1c, B2 & B8).
- Large-scale strategic warehousing, in units of around 100,000 sq ft or more, typically provided as new build on specialist logistics parks (B8).

4.22 We distinguish these two sub-sectors because they have different market drivers as discussed later.

National context

4.23 Across both sub-sectors, the national industrial market remains healthy. During the global economic crisis speculative development came to a halt. At that point in time there was excess supply to meet demand due to weakening occupier demand and the wave of speculative development that had occurred pre-financial crisis (driven by easy access to finance).

4.24 In recent years, supply has tightened. This is due to improvement in the economy, changing shopping patterns (increase in online sales), and some units being lost to higher value residential uses. Most recently, the devaluation of the pound has supported growth in the UK manufacturing sector, by making exports more competitive.

4.25 In some areas of the country supply of industrial units have not kept pace with demand due to the lack of new build development occurring. Developers are finding it much harder to fund industrial warehousing development then compared to pre-financial crisis. Due to the tight nature of the funding markets, speculative development is generally only occurring in super prime areas e.g. parts of the M1 corridor, Golden Triangle, Heathrow and north M25. These areas have very strong occupier demand from companies with blue-chip covenants, therefore the perceived risk is low. Speculative development is often only occurring for larger units that can be occupied by these large national /international firms.

4.26 The lack of speculative development has led to an imbalance in the market, with some occupiers having to wait for build-to-suit opportunities; or taking second-hand space or multiple units to satisfy immediate requirements. With a lack of suitable medium sized space (e.g. 20,000 – 50,000 sq ft), occupiers across the country are struggling to find suitable space to expand into. This is having a knock-on effect, with smaller units not experiencing natural levels of market churn and therefore not freeing up space for micro SMEs and start-ups.

4.27 Market pressure is unlikely to reduce in the immediate future, with property agents Cushman & Wakefield stating that ‘In the short-term, occupier demand is expected to remain strong, supported by both a rise in exports and ecommerce related activities. Severe supply constraints in key regional markets should continue to put upwards pressure on prime rents.’ Over the long term, there is of course more uncertainty with Cushman & Wakefield predicting that ‘demand for industrials will fluctuate with economic drivers such as the value of sterling, manufacturing and production, exports, domestic consumption and BREXIT.[5]

General industrial space

Swale Borough as an industrial location

4.28 Traditionally Swale was considered more affordable than Medway or Maidstone. But in recent years a lot of the Borough's supply has reduced, increasing rents and bringing them more in line with surrounding areas. Therefore, the Borough is competing for occupiers with those neighbouring areas. Within the sub-regional market, there are footloose occupiers that will take space as and when it becomes available, rather than seek to choose one location over another.

4.29 The Borough benefits from a diverse mix of blue-collar and white-collar employment, giving it a varied and robust economy. The wide-ranging employment sectors include:

- Advanced engineering/manufacturing
- General manufacturing
- Research and Design
- Storage
- Distribution
- Building supplies and trade counters

4.30 To enable more detailed analysis, we have split Swale's industrial market into four geographical areas (see Figure 4.1, above):

- Faversham
- Sittingbourne
- Sheerness/Queenborough
- Rural Swale

4.31 To analyse different levels of take up, amount of existing stock and availability we have broken the data into different size bands as set out in Table 4.1.

Table 4.1 Size Bands

Sqft	Name
up to 5,000 sqft	Micro
5,001 - 25,000 sqft	Small
25,001 - 50,000 sqft	Medium
50,001 - 100,000 sqft	Mid
+100,000 sqft	Large

[5] Cushman & Wakefield (Spring 2017) *UK Industrial & Logistics Market Outlook*

Faversham

4.32 There are six main industrial employment areas in Faversham; they vary in age and quality:

- **The Foundry** – to the north of the town, built and let/sold over the last 10 years and is the newest estate. It is made up of multiple phases of development, providing numerous small flexible terraced industrial units (see Figure 4.3).
- **Eurocentre** – to the east of the town, built c. 2008 and is similar type of development to the Foundry in terms of unit sizes. But it is slightly older (built in 2008) and is of higher build quality i.e. brick rather than steel clad. Eurocentre is part of a wider estate that includes offices and retail premises.

Figure 4.3 The Foundry (left), Eurocentre (right)

Source: AspinallVerdi (2017)

- **Oare Industrial Estate/Western Link –** to the north of the town, is occupied by large, national distribution occupiers and the stock is of mixed ages and the estate sees little churn.
- **John Hall Close Industrial Estate –** is located in the north of the town adjacent to Oare Road Estate and is made up of smaller dated units.
- **Graveney Road Industrial Estate –** to the north east of the town, consists of a small cluster of industrial units, trade counter and office space. The units are dated with some as old as the 1970s.
- **Upper Brents Industrial Estate –** is located to the north of the town centre and consists of a number of small industrial uses, served by poor quality on-site infrastructure. The units are dated, but generally are of reasonable quality.

4.33 Occupiers in the town range from local business, occupying the smaller units at the Foundry/Eurocentre, to much larger national businesses, such as Marks and Spencer(Gist) and Shepherd Neame around the Oare Road Industrial Estate. When compared to Sittingbourne, Faversham has a smaller industrial market.

4.34 Faversham's residential market is stronger than Sittingbourne's. Whilst both benefit from excellent rail links with London, making the City easily commutable, Faversham benefits from the high quality historic environment and also from its close proximity to Canterbury.

4.35 There is some evidence of clustering of sectors on industrial estates. Oare Road Industrial Estate is predominantly distribution/storage-based sectors, whereas the Foundry, Eurocentre, John Hall Close etc. are more mixed, but the units are generally smaller to suit more local, smaller occupiers.

Sittingbourne

4.36 There are three main industrial employment areas in Sittingbourne; they vary in age and quality:

- **Eurolink Phases 1 – 4** –is a large multi phased industrial area located on the east of the town. It is set to be expanded further with phase 5 permitted. Phases 1 to 4 were built from 1970s – 2009 and is the largest industrial development in the Borough. It comprises diverse range of unit types/sizes, with a corresponding mix of occupiers - Figure 4.4 provides an example of some of the most modern units on the estate

Figure 4.4 Eurolink

Source: AspinallVerdi (2017)

- **Trinity Trading Estate** – is considerably smaller than the Eurolink development and located further west in the town, but was the main industrial area until the development of Eurolink. The Estate comprises a mix of quality and size of units, some dating from the 1960s, many of which have been refurbished over the years, as well as modern units such as those on the eastern side of Mill Way. Examples of the units on the Estate are shown in Figure 4.5.

Figure 4.5 Trinity Trading Estate

Source: AspinallVerdi (2017)

- **Kemsley Fields Business Park–** located towards the north of Sittingbourne. There are a number of large industrial units here, including DS Smith Paper Mill.

Sectors included distribution, large scale manufacturing, transport and energy production. For some occupiers Ridham Dock a point of entry used to transport goods.

4.37 There is evidence of some clustering of sectors in Sittingbourne; generally, trade counters and manufacturing occupiers located at Trinity Trading Estate. The occupiers at Eurolink are more diverse due to the wide range of units available; in terms of quality, age and size.

Sheerness/Queenborough

4.38 There are four main industrial employment areas in Sheerness & Queenborough; they vary in age and quality:

- **Sheerness Port area –** represents the largest area and quantum of space in the Sheerness/Queenborough area. Land is being used for a number of uses including car storage, port related equipment and repairs.
- **New Road Industrial Estate –** comprises dated stock with a variety of units occupied by manufacturing occupiers.
- **Rushenden Industrial Estate** - as shown in Figure 4.6 Rushenden Industrial Estate is similar, with traditional style industrial units from 1960s - 70s and areas of land used for open storage.

Figure 4.6 New Road Industrial Estate, Sheerness

Source: AspinallVerdi

- **Neatscourt** – located south of Queenborough, adjacent to the Rushenden Industrial Estate and with direct access on to the A249, which is dualled at this point, the area is anchored by a new regional warehouse for Aldi, and has a retail and leisure core, but a supply of land available for further employment uses.
- We note that the **Klondyke Industrial Estate** - located in Queenborough is no longer in employment use, as it is currently being demolished in readiness for redevelopment for c. 1,250 new homes.

Rural Swale

4.39 There are a number of industrial employment areas outside of the major settlements listed above. The main areas are:

- Broadoak Enterprise Centre
- Waterham Industrial Estate
- Spade Lane cold store and industrial units
- Newington Industrial Estate and Newington Enterprise Centre
- Otterham Quay Lane (Upchurch)
- Hengist Field (Borden)

- Dunkirk Industrial Estate, and
- Bobbing, a grouping of small employment sites along Sheppey Way.

4.40 All of these estates/groupings are small in size and have corresponding small units. The stock is dated and, in some cases, do not meet modern occupier requirements. Connectivity to these rural estates is less good in comparison to connectivity for the employment areas in the larger settlements.

4.41 Additionally, in a few locations farm buildings have been converted from agricultural to employment or employment / leisure uses such as Stone Stile Farm, Selling (food manufacture), Lamberhurst Farm, Highstreet (various uses), Macknade, Selling Road, Faversham (food manufacture/leisure) and Brogdale Farm (brewing/leisure). Additionally, there are specialist marine related employment uses at North Quay, Conyer Creek.

Demand

Overview

4.42 Table 4.2 shows that between 2013 and 2016 the annual industrial take-up averaged 216,456 sq ft across 119 transactions. Take-up for 2017[6] was 115,013 sq ft, which is almost as much as in 2016, but is far below the levels in 2013-2015. This fall in take-up, as we discuss later, is not due to a lack of demand for space, but due to a lack of supply.

Table 4.2 Annual Industrial take-up 2013-2017 (all occupational deals)

Year	No. of transactions	Total take-up sqft
2013	29	204,947
2014	44	294,783
2015	22	244,138
2016	24	121,956
2017	17	115,013
Total	**136**	**980,837**
Annual average 2013 - 2016	**30**	**216,456**

Source: EGi (2017)

4.43 Table 4.3 shows that since 2013 the spread of take-up in different size bands is broad, but with particular low take-up for units above 25,000 sq ft. The single transaction over 100,000 sq ft was let to Bond Retail Services, for manufacturing in Sheerness.

[6] Data recorded until October 2017 in advance of the stakeholder event

Table 4.3 Industrial take-up by size, 2013-2017 (all occupational deals)

Size range	Total No of units	% of units by size range
up to 5,000 sqft	88	65%
5,001-25,000 sqft	38	28%
25,001-50,000 sqft	6	4%
50,001-100,000 sq	3	2%
+100,000 sqft	1	1%
Total	**136**	**100%**

Source: EGi (2017)

4.44 Agents report that the focus of the local market is on units under 25,000 sq ft within the Borough as a whole, and that there is a shortage of expansion space for companies, in some cases it is for units larger than 25,000 sq ft.

4.45 Across the whole Borough there is a general need for units to be flexible. This includes the availability of units with a suitable amount of yard space. Often occupiers are using units for multiple purposes, including distribution.

4.46 Agents report that one of the sectors that is seeing the most requirement is food production. This is Borough-wide, not in any specific settlement. Food occupiers tend to have specific requirements, i.e. specialist flooring for drainage and units that can contain specialist equipment.

4.47 Table 4.4 shows the broad range of occupiers who have taken space across the district since 2013. Some of the take-up is from existing occupiers expanding and taking more units, and others are from start-ups and occupiers relocating to the area from the west or east. Agents report that the market is very tight and if land was made available occupiers would take the units. With availability so low firms may need to begin to look outside of Swale for suitable premises.

Table 4.4 Examples of occupier take-up transactions 2013-2017

Industrial estate	Transaction Date	Occupier	Sector	Size of unit (sq ft)
Faversham	03/08/2016	Whitstable Woodworking	Contractor	2,100
	24/12/2015	Hall Refrigeration	Contractor & parts sales	2,000
	24/03/2015	Rob Thompson Construction Ltd	Domestic Contractor	2,100
	24/03/2015	Mighty Fine Things	Food production	1,300
Sittingbourne	04/07/2017	The Wipe Company	Manufacturing	29,900
	22/03/2017	Vertu Motors	Distribution (Car parts)	15,800

	22/02/2017	BSB Engineering Service	Manufacturing and distribution	3,700
	20/04/2016	LKM Recycling Limited	Waste disposal	5,600
	30/04/2013	Bennett Opie	Food production and distribution	50,000
	22/03/2013	North Kent Logistics	Distribution	15,500
Sheerness & Queenborough	19/05/2016	Vals Cars 98 Limited	Storage	2,500
	15/04/2016	Harry Levy Amusement Contractor	Storage	6,800
	04/03/2015	Bond Retail Services	Shopfitter, manufacturing, distribution and design	122,900

Source: EGi 2017

Faversham

4.48 Faversham has generally seen take up from occupiers seeking smaller units in the wider East Kent market. This is a reflection of the type of stock the town has to offer. In recent years take up has slowed which is reported by agents due to lack of available space.

4.49 Most in demand are units sized between 1,000 – 3,000 sq ft. Occupiers prefer small modern terraced units as evidenced through the Foundry and Eurocentre developments.

4.50 Occupiers in Faversham prefer to be near the town centre so they can access local amenities. Occupiers are generally light industrial uses that often require a large element of office space– enabling them to use their units in flexible ways e.g. office/admin, storage, light manufacturing etc. Small industrial units with roller shutter doors and designed with the potential of fitting a mezzanine floor gives occupiers this flexibility. Within the Foundry, for example, there are occupiers using the space for storage/workshop space, next door to occupiers who are designers/printers (Blue Ant) having the majority of the industrial units dedicated to office space.

Sittingbourne

4.51 Sittingbourne is the industrial location most in demand in the Borough. Since 2013 there has been some evidence of take up of slightly larger units of up to 50,000 sq ft, but the majority has been less than 10,000 sq ft. Take up has mostly come from existing occupiers expanding, or from companies relocating from adjacent districts i.e. Medway or Maidstone. Sittingbourne is seen as an alternative location due to its comparable affordability.

4.52 There is a reasonable number of manufacturing occupiers located in the town and generally these are located in older, larger units. For some occupiers these better fit their requirements, and are more affordable than modern units. Manufacturers are prepared to prioritise affordability over quality of unit.

4.53 , There is demand in Sittingbourne for flexible units (as there is in Faversham), and any available units are taken up quickly. Occupiers often fit out units with mezzanine floors (again as is the case in Faversham), dedicating a large element of this added space to offices.

Sheerness/Queenborough

4.54 In Sheerness and Queenborough there is generally less take up and less variety of occupiers from different sectors taking space. The towns have traditionally had occupiers from heavy industries, often related to port activity. Take up in the last three years has come from occupiers using space as storage.

4.55 In general, the Isle of Sheppey is a less attractive location to occupiers than the mainland. This is due to perceived poor connectivity by occupiers, who see the area as too far away for the motorway network and the potential closure of the bridge to high-sided vehicles due to high winds. But agents confirm that new space would be demand if units were small/medium sized and offered on flexible terms at competitive rents.

Rural Swale

4.56 Similar, to Sheerness/Queenborough there has been far less take up in rural Swale than in Faversham and Sittingbourne. In the rural areas of Swale agents report that there is less market churn, as occupiers are generally local, often owning the freehold.

Freehold demand

4.57 Freehold units are in demand from owner occupiers in all areas of the Borough. Some company directors have used these as investments for their SIPPs (pension funds). Generally freehold units are only in demand at a price up to £300,000 per unit - developers report this is often the maximum amount owner occupiers can borrow to purchase premises. Demand for freehold property is from companies taking smaller units, which reflects the profile of take up in Table 4.3 above, in schemes like Precision Park (Eurolink)/The Foundry etc., and there are some examples of occupiers taking larger units in developments like Eurolink.

Supply and market balance

Overview

4.58 Table 4.5 shows that there are 58 units currently available, providing a total of 210,836 sq ft. This is against a total stock of 1,144 units / 7.51 million sq ft registered on VOA. Therefore, there is a current vacancy rate of 2.8% of floor space and 5.1% of number of units. If we cross reference the availability in Table 4.5 with annual take-up in Table 4.2; the availability across the Borough equates to just less than 12 months' supply in relation to number of units and 23 months' supply in relation to floorspace. Both these indicators show the market is very tight.

Table 4.5 Availability of industrial space

Total Stock	8.54m sqft	1,146 units
Availability	210,836 sqft	58 units
	2.5%	5.1%

Source: EGi, VOA, AspinallVerdi

4.59 Vacancy measured by units is low, but vacancy measured by floorspace is very low. There is a significant lack for space for some occupiers to take up in the Borough.

4.60 Agents report that generally across the Borough the majority of vacant space is poorer quality stock, usually with a low Energy Performance Certificate (EPC) of E or F. From 1st April 2018 landlords must ensure that their properties reach at least an EPC rating of E before they can grant a new tenancy. The implications of this are not immediately known, it could encourage owners to immediately invest, or it could encourage applications to come forward for other uses because owners may state that industrial is thereby no longer viable.

4.61 In the short term, there is likely to be some relief with 'build to suit' opportunities at Eurolink 5, G-Park etc., but most of these allocations focus on medium to larger sized units.

Faversham

4.62 Table 4.6 shows that there are 2 units available on EGi under against a total stock of 142 units registered on VOA. At the stakeholder event agents reported that this figure seemed reasonably accurate, with the market being generally tight. Vacancy is generally considered to be low, especially when we are seeing strong demand across all unit sizes in Faversham and the lack of availability elsewhere in the Borough.

Table 4.6 **Faversham stock and availability**

Size range	Total No of units	% of units by size range	No. of units available	% of units available
up to 1,500 sqft	43	30%	1	2.3%
1,501-5,000 sqft	80	56%	1	1.3%
5,001-50,000 sqft	18	13%	0	0.0%
50,001-100,000 sqft	1	1%	0	0.0%
+100,000 sqft	0	0%	0	0.0%
Total	**142**		**2**	**1.4%**

Source: EGi, VOA, AspinallVerdi (2017)

Sittingbourne

4.63

4.64 Table 4.7 shows that there are 53 units available on EGi. This is against a total stock of 464 units registered on VOA therefore equating to a vacancy rate of 11.4% of units. Agents confirm that this figure misrepresents the actual availability in the town. Both Precision Park and Glenmore Business Park have recently been built out and are all under 5,000 sq ft. EGi shows a number of these units as available when they are both already c. 40% let or sold. Agents report even though the figures here make vacancy seem high the market is generally very tight and there is limited suitable space. The actual vacancy rate in Sittingbourne will be lower than the 11.4%, albeit not as low as the 1.4% in Faversham where there are just two units available.

Table 4.7 Sittingbourne stock and availability

Size range	Total No of units	% of units by size range	No. of units available	% of units available
up to 5,000 sqft	309	67%	43	13.9%
5,001-25,000 sqft	109	23%	10	9.2%
25,001-50,000 sqft	32	7%	0	0%
50,001-100,000 sqft	10	2%	0	0%
+100,000 sqft	4	1%	0	0%
Total	**464**		**53**	**11.4%**

Source: EGi, VOA, AspinallVerdi (2017)

Sheerness/Queenborough

4.65 Table 4.8 shows that there is 1 unit available on EGi. This is against a total stock of 237 units registered on VOA therefore equating to a vacancy rate of 0.4% of units. The market is made up of predominantly smaller units with the majority of stock listed on the VOA in under 5,000 sq ft size band. Agents report less market churn here than in other areas, as there are more local occupiers and freehold ownership.

Table 4.8 Sheerness/Queenborough stock and availability

Size range	Total No of units	% of units by size range	No. of units available	% of units available
up to 5,000 sqft	180	76%	1	0.6%
5,001-25,000 sqft	39	16%	0	0.0%
25,001-50,000 sqft	11	5%	0	0.0%
50,001-100,000 sqft	7	3%	0	0.0%
+100,000 sqft	0	0%	0	0.0%
Total	**237**		**1**	**0.4%**

Source: EGi, VOA, AspinallVerdi (2017)

Rural Swale

4.66 Table 4.9 shows that there are 2 units available on EGi. This is against a total stock of 301 units registered on VOA equating to a vacancy rate of 0.7% of units. All availability is in the 5,000–25,000 sq ft size band.

Table 4.9 Rural Swale stock and availability

Size range	Total No of units	% of units by size range	No. of units available	% of units available
up to 5,000 sqft	265	88%	0	0.0%
5,001-25,000 sqft	30	10%	2	6.7%
25,001-50,000 sqft	2	1%	0	0.0%
50,001-100,000 sqft	2	1%	0	0.0%
+100,000 sqft	2	1%	0	0.0%
Total	**301**		**2**	**0.7%**

Source: EGi, VOA, AspinallVerdi (2017) nb this table excludes the Kent Science Park

4.67 In both Sheerness/Queenborough, and Rural Swale, there has been limited new build activity in recent years. Agents report that availability in both areas has been low for many years, and though there is less demand here compared to other areas, if space comes available it would be occupied.

Rents/capital values

4.68 Agents report as there is little availability in the Borough, it is currently very much a 'sellers' market' when setting rents. This has made rent rise significantly in the last 2 years. In Styles Court (some of the most recent development, Phase 4 of Eurolink) has seen rents rise from c. £5.75 psf to £7.25 psf in the last year and a half.

4.69 In the last few months the market has started to slow. There have been longer void periods on available units and rents have stopped increasing. Agents consider this results from the continued political and economic uncertainty generated by BREXIT and the present minority government.

4.70 Development is generally viable providing that land values are around £400,000 per acre and rents around £8 psf. However, at these values there is no scope to cover 'abnormal costs' such as land remediation where the former use left the site unacceptably contaminated. In these cases, some internal cross subsidy from other uses is needed to redevelop the site. Developers also report that build costs have risen faster than rents/capital which has had a knock-on effect on viability. If build costs continue to rise, and the market stagnates viability could become an issue.

Faversham

4.71 There is no evidence of new build units recently being leased in Faversham. But agents report currently capital values as:

- £125 psf (small terraced units)

4.72 For reasonable quality second-hand units, rents are:

- £6-7 psf for small units
- £5-6 psf medium/large units (5,000 sq ft and over)

Sittingbourne

4.73 Agents report that the majority of new development in Sittingbourne has been sold rather than let. Glenmore Business Park & Precision Park are both recent developments consisting of small units of c. 1,000 – 2,000 sq ft. Agents report that both these developments were viable because of the minimal land costs. This was down to the developer's specific circumstances. These both recently sold/let for:

- £140 - £150 psf capital value
- £9 - £10 psf rent & 6.5% yield

4.74 There is no recent evidence of new build medium/large (5,000 sq ft and over).

4.75 Second hand rents in Sittingbourne vary between the estates, as the stock varies in quality, specification and age.

- Trinity Trading Estate - £5 - £5.50 psf
- Older Phases of Eurolink - £6.50 - £7 psf
- Newer Eurolink (eg Styles Close) -£7 - £7.25 psf

Sheerness/Queenborough/Rushenden

4.76 The very large Aldi distribution centre is soon to complete, and there is a planning application for a new manufacturing and distribution facility for Medichem on the northern side of the A249 that demonstrates the attractiveness of this area for industrial as well as warehouse uses. Elsewhere agents report that there have been no recent new build schemes in Sheerness/Queenborough meaning there is a lack of rental/capital evidence. Agents report that if new build stock was built rents and capital values would have to be lower than Faversham and Sittingbourne to attract suitable occupiers. These lower rents and capital values would have to be reflected in the land value to enable viable development.

4.77 Second rents and capital value levels vary significant dependent on the standard of stock, but generally rents are between £3 - £5 psf.

Rural Swale

4.78 There has been no new build activity in rural Swale in recent years. Similarly, to Sheerness/Queenborough agents report that any future new build development outside of the main settlements would achieve less than Sittingbourne/Faversham.

4.79 Second hand stock varies based on concavity and the quality and the size of units. There is limited transactional evidence in rural areas and agents report there is a less established 'rental tone. Rents reportedly vary from £3 - £5.50 psf – at these rents development is not viable.

Development opportunities

4.80 As part of the study we asked agents/developers what they see as development opportunities for both general industrial and distribution. We have broken this down into individual areas as some parts of the Borough have better development prospects than others.

Faversham and Sittingbourne

4.81 Agents and developers agree that the best development opportunities are for 1,000 – 3,000 sq ft in Faversham and 1,000 – 8,000 sq ft in Sittingbourne. These sizes of units could be speculatively built and there would be demand enough to fill them. Any new development should be flexible. It is less risk to a developer to design units in a way fits a range of occupier requirements. If occupiers require larger units it is effective to design buildings in a terrace that can be subdivided/knocked together. All small new build stock in Faversham and Sittingbourne built in recent years are designed to be able to accommodate a mezzanine floor to allow for occupier flexibility.

4.82 There is an opportunity to develop larger units i.e. 8,000 sq ft, especially in Sittingbourne. Agents report there has been no units delivered in recent years meaning there are few suitable premises for occupiers to expand into. There is an opportunity to develop this larger space plus as there is a reasonable level of demand, however, this space is usually harder for developers to build out speculatively as they often to take longer to let than smaller units.

4.83 Although agents note this opportunity applies to Sittingbourne this does not mean there is no scope for larger units at Faversham. The market is much smaller here and so Faversham is not on the ‘radar’ as much as Sittingbourne. But Faversham is easily accessible to both Canterbury and the North Kent towns and arguably better located to attract growing firms who want to serve this part of mid Kent (and Eastwards). So should land be promoted in Faversham, which includes a mix of larger units, this should not be discounted simply because the existing market has traditionally favoured smaller units. Nationally there is growing demand for last mile delivery, and some of this could be accommodated in Faversham.

Sheerness/Queenborough/Rushenden

4.84 The new Aldi distribution depot unit at Neatscourt has taken up the majority of that employment allocation. Agents report that if further units were built out they would likely be taken up as there is so little supply elsewhere in the Borough.

4.85 There is some further land within the Neatscourt allocation, and agents consider that the new Aldi distribution depot will be the catalyst for requirements from occupiers linked to Aldi’s supply chain, but this is a generally very good location for industrial and warehouse activity not just foodstore related activity.

Rural Swale

4.86 In rural Swale development is best located on the main land, around the A2 in particular, but also other principle roads, or on the periphery of Sittingbourne and Faversham. Although there is demand across the whole area and occupiers would take units in more rural areas, rents would have to be comparably cheaper than in towns and they would only take space in sites with reasonable connectivity. With lower rents in these areas development might be unviable; cheaper land values may not outweigh ever increasing build costs. It is very difficult to predict what future rural demand may be, because demand for property is driven by a very small number of local firms who may not be able to see their growth requirements in such a way that the Local Plan can make land allocations. In our policy recommendations we suggest the Council consider an exceptions policy to more accurately reflect how local firms generate demand for additional space.

Conclusion: the general industrial market

4.87 Our analysis is shows that there is demand for additional small and medium units across the Borough. There has been some relief in recent years for small units with developments like the Foundry in Faversham, and Precision Park and Glenmore Business Park in Sittingbourne. But these developments have been popular and let/sold quickly so there are now few available units left, and in the case of the Foundry there is no vacancy. Borough-wide availability and take up –Table 4.5 & Table 4.2 respectively; show that the vacancy across the Borough equates to less than 12 months' supply in relation to number of units and 23 months in relation to floorspace. In addition to the existing stock, there are a number of outstanding planning permissions. But some of these i.e. Eurolink phase 5 are currently being developed and will only satisfy short-term demand. Due to the low levels of availability of current stock and the current demand for new space there not sufficient allocations to fulfil demand throughout the plan period.

4.88 Both developers and agents alike have confirmed that if new units were to be brought forward there would be sufficient demand for them to be let/sold. This tight market is not unique to Swale; within the whole of Kent and indeed the South east more generally, there is a lack of industrial supply matched with substantial demand for industrial units. The current point in the cycle does provide a market opportunity for Swale to attract occupiers from the wider sub-region if sites were made available.

4.89 Our research shows that for industrial and warehousing activity Sittingbourne is more affordable than areas to the west closer to London such as. Medway and Maidstone. To the east, there is an opportunity in Faversham to attract occupiers from East Kent generally and in particular Canterbury because of restricted supply. Sheerness/Queenborough/Rushenden, and the Isle of Sheppey as a whole, has not fully realised the potential of the new bridge crossing completed over 10 years ago. With the market so tight and some allocated land and other land potentially available on the Isle of Sheppey, units could be built out and let/sold for cheaper rents, with affordability being the incentive to attract occupiers from more expensive areas.

4.90 If the Borough fails to deliver, some occupiers will choose to relocate or expand elsewhere; others, who cannot move away because they need to keep existing workforces – will be unable to grow or modernise as they would otherwise do. If new land were allocated for development these constraints would be removed and the local economy would perform better.

4.91 The solution for the Council is to allocate more sites. In allocating land, the Council should, where possible, target unconstrained sites, to enable viable development. It is also important that sites are allocated in the correct locations. Where available land should be allocated near existing employment estates e.g. future phases of Eurolink for larger scale units to benefit from shared infrastructure and the clustering of industrial activity. In other areas, where sites have good access to amenities these will be more suitable for smaller units.

4.92 Agents report that there is opportunity in rural areas to develop space but there is no precedence of successful new development in these areas. Though there is demand it is less than around Sittingbourne and Faversham.

4.93 The Council will require a mix of sites, in different locations over the plan period around Faversham and Sittingbourne. These sites will need to deliver a range of sizes of units. Generally, in Faversham developments should consists of a mix 1,000 – 3,000 sq ft units with some units up to 5,000 sq ft. Sittingbourne requires that same but along with smaller units, some larger units up to c.25,000 sq ft. Agents report that there is demand for larger units, though generally these are more ‘footloose’ and generally are looking at the wider Kent area.

4.94 Finally – industrial stock is in short supply across the whole County and new supply, even where viable, frequently struggles to come forward as developers often hold out of residential values. To successfully deliver industrial space means that the Council needs to minimise the opportunity for sites allocated to meet economic needs being promoted for housing. Our view is that because freehold demand is so strong it is very unlikely that, should sites be offered freehold, they would not be taken up. Later we review the Councils existing development management policies but here we note that the Council should always seek evidence that a site has been offered for freehold development before concluding that other uses are acceptable.

Strategic Distribution

National context

4.95 This category of warehouse facility serves a national, regional or sub-regional function, they are distribution hubs where bulk goods come in and are consolidated and packaged for onward delivery to stores or local warehouses for customer delivery. The typical threshold for the bottom end of strategic warehousing is 150,000 sq ft and they can scale up to above 1 million sq ft. Increasing demand for warehousing across the UK has been driven by the growth in online retail. Occupiers are often retailers themselves, or 3rd party logistics companies (3PLs) who distribute goods on their behalf. These companies tend to offer good covenants and are prepared to commit to institutional lease terms – therefore creating good capital values. These good capital values not only provide an incentive for developers to bring forward units – it also enables them to bid competitively for sites.

4.96 In recent years, new-build development has typically involved very large units of up to 1 million sq ft. With the very largest requirements coming from retailers. Demand for units has been strong, and the relationship between capital value / land value / build costs / developer return is maximised. Because there has been a focus on delivering very large units, there has been fewer small and mid-sized units (circa. 150,000 sq ft or less) being delivered, where build costs are slightly higher, but agents are now reporting that the market is shifting.

4.97 Current demand is mainly for more compact distribution units, which are suited to local and regional distribution rather than national. Although there is still market evidence of very large activity occurring (e.g. Amazon taking 1.1 million sq ft unit of iPort Doncaster) throughout the country. Demand for the smaller units are generally from the same blue-chip covenants who previously sought larger units. But with few units of this type delivered in recent years, supply has tightened and rents are now increasing. This means that small to mid-sized units have increasingly become attractive for developers who are now willing to bring forward units of this type.

Swale as a logistics location

4.98 Due to the geographical constraints of the area i.e. coast line to the east the Swale the area is not attractive to some logistics occupiers. Some occupiers prefer locations with 360-degree access to allow for efficient distribution network. But, as land supply has tightened close to the London, this has led to the availability of new sites decreasing and occupational costs increasing. As a result, areas further away from London such as Swale are becoming attractive to occupiers. Due to the nature of the logistics market occupiers are can be footloose, rather than having a requirement for a specific location. Occupiers follow the availability of sites and make an assessment of their suitability based on how it aligns to their business needs.

4.99 As shown in Figure 4.7 strategic distribution units Swale are large in size, modern and of good quality. The major strategic distribution units in Swale are;

- Morrison distribution unit at Ridham/Kemlsey – c. 900,000 sq ft over two units
- Aldi distribution unit at Neatscourt, Isle of Sheppey – c. 672,000 sq ft
- Gist distribution unit at Faversham town centre – c. 107,000 sq ft

Figure 4.7 Morrisons Distribution units (G-Park) & Aldi Distribution unit

Source: AspinallVerdi & google images (2017)

Demand

4.100 Agents report there is demand for logistics space in the Borough especially in G-Park, Ridham adjacent to the existing Morrison distribution unit. This area is attractive to occupiers as it has reasonable prominence, and connectivity provided by the A249.

4.101 On the Isle of Sheppey, Aldi recently developed their new regional distribution centre at Queenborough. Traditionally strategic distribution has not tended to be the focus of the market here, with some occupiers having a negative perception regarding its connectivity. But agents report that the Aldi unit could be a watershed moment in the Sheppey market, as it may show potential occupiers that there are in fact no connectivity issue by locating on the island. Agents suggest that over the plan period demand for logistics space in this location may increase if land is made available at competitive prices.

4.102 In Faversham, agents report that the historic town centre is not attractive to modern day logistics occupiers who require direct access to main roads. However, peripheral locations such as Oare, Western Link home to GIST and Shepherd Neame distribution facilities amongst others are attractive locations and could attract occupiers from the wider East Kent area.

4.103 Units in the Borough in recent years have been large, upwards of 500,000 sq ft, but agents report that there is demand for smaller units in the right location. Especially from online retailers, who are looking for appropriate space in Kent.

Supply and Market Balance

4.104 The supply in the Borough is split over 4 units (two occupied by Morrisons) which comes to a total logistics floorspace of 1.7 million sq ft. There is currently no availability in any of the B8 logistics accommodation. But this reflects the nature of the market. There has been no speculative development of units, and no occupiers have vacated sites.

4.105 Currently there is available allocated land for future development of logistics warehousing in Swale. Around the Morrisons distribution facility there are two plots currently being marketed for build to suit opportunities. The developer Gazeley is promoting the site for two or three warehouses ranging between 127,500 - 540,000 sq ft.

4.106 There are further opportunities around the Aldi distribution warehouse on the Isle of Sheppey. The Neatscourt employment land allocation has a number of undeveloped plots, which may be suitable for logistics space, albeit are likely to be too small for strategic warehousing. This site is currently being marketed by Savills for a range of employment uses. Neatscourt may become a more attractive location for logistics over the plan period, with the introduction of a new rail freight terminal in Sheerness.

Rents

4.107 Larger distribution occupiers are less concerned with a specific area and will take space anywhere it connects well to the motorway network. There is limited evidence in recent years of occupiers taking space but agents report that rents are generally between £5.50 - £6 psf for quality units over 100,000 sq ft. At these rents combined with a pre-let to strong covenant development is viable.

Conclusion: the strategic distribution market

4.108 There are examples of strategic distribution occupiers taking space in the Borough, most notably with Morrisons at G-Park, Ridham and Aldi on the Isle of Sheppey. The market attractiveness of Swale as a location is the current availability of sites that can accommodate large units and competitive pricing of land.

4.109 There are still a number of allocated sites around G-Park at Ridham which are still unoccupied. This available land is likely to satisfy short-term demand. Agents report that there is already occupier interest in some of the current allocations, and it is likely these will be developed early in the plan period. If the allocations at G-Park, Ridham and Neatscourt are developed there is no other allocated land which will be able to absorb future demand. To be able to capitalise on logistics opportunities the Council should consider allocating land to capture demand over the medium to long term.

Waste and Recycling

4.110 The Borough has attracted large waste, recycling and waste to energy operators in the past, most recent examples include the Wheelarbrator generating station at the Kemsley Paper Mill and the Countryside gypsum recycling facility at Kemsley Field, and there is no reason why additional demand from these uses cannot be accommodated in the future. Whilst the KCC starts and completions data does not identify and record recycling and energy from waste activity as B use class, the jobs generated by schemes in the past is built into the forecast for job growth in the sector in the future (our view being these are B class buildings/jobs), and is thereby built-into the growth forecasts for the need for industrial land. Both schemes referred to above are being built-out within existing employment areas, and no new land was required. We consider it reasonable to expect that any future need for recycling and energy from waste facilities will be meet either from within the existing employment sites or will be accommodated within the new land identified for industrial use.

4.111 However, we would note that London, the largest generator of waste material in the wider South East, is seeking to reduce the amount of material sent out of the London Boroughs in the future, and increase the amount of recycling and re-use managed within London. For Swale we cannot draw firm conclusions on what this may mean for future demand should the GLA fail to meet their objectives then demand for sites around London (inc. Swale) may increase. It is also questionable that the GLA has, with the Boroughs, enough industrial land to process more waste without relying on neighbours. But the 'direction of travel' would suggest that a strategy based on increasing the quantum of waste flowing into Swale should be treated with some caution.

Offices

National context

4.112 Typically, new office development is financially viable in major towns and cities. Generally, new development requires a pre-let in place to a blue-chip covenant – i.e. on a long lease to a high-quality tenant that is likely always to pay its rent and adhere to its obligations. This structure gives sufficient security to the investment to enable funding to be obtained.

4.113 Speculative office building occurs in London and key regional centres where there is very strong office demand. Key regional centres where speculative office building has occurred is in the Thames Valley and cities such as Birmingham and Manchester.

4.114 In recent years the main drivers of demand for new office space has been from finance, professional services and Technology, Media and Telecommunications (TMTs). Since the BREXIT decision there has been a slight cooling of office demand from finance and professional services, but demand from TMTs remains robust.

Swale Borough as an office location

4.115 Swale is primarily seen as an industrial location rather than a recognised office market. In Swale, and in the surrounding boroughs, the largest occupier in the towns is usually the public-sector council offices. Other larger occupiers are few and most are usually located in the area for historic reasons. With London so close to Swale most occupiers prefer to be located in the capital or recognised office locations nearby.

4.116 Even within Kent, Swales office market is comparably small. This is a result of the size of the market, in comparison to industrial, its proximity to London, and its context within Kent. Within the wider county most occupier activity is focused on the larger towns of Maidstone and Ashford, or the out of town business parks, like Kings Hill (Maidstone) and Discovery Park (Sandwich).

4.117 The office stock in Kent is to be further expanded with c. 900,000 sq ft of commercial space proposed as part of the Ebbsfleet Garden City. The Ebbsfleet Garden City forms part of the North Kent Enterprise Zone (EZ). This EZ has been created to encourage growth in medical and healthcare research, training and practice, advanced manufacturing, engineering and digital technologies. The EZ provides incentives to business through providing rate relief of up to £55,000 per annum for five years.

4.118 The Borough has minimal office stock, with the majority of the accommodation found in Sittingbourne, Faversham and Sheerness, and at the KSP which provides high quality office/R&D space, and is discussed later in this report. The stock is generally dated; often located above shops in the town centre, with small units to service local companies. The most recent example of speculative office development occurring in the Borough has been at Conqueror Court. This completed in 2008 in a time when development finance was accessible and the balance to between build costs and rents/yields was more favourable. Occupiers of Conqueror Court include C.T. Associates (Accountants) and HEM Ultrasound (NHS and Private diagnostic ultrasound scans).

Demand

4.119 Property agents report that there is no one sector, nor location, driving demand for office space in the Borough, however, a key requirement is the provision of on-site car parking. Demand for office space in the Borough is on a small scale and tends to be from businesses already located in Swale and serving local markets. Agents report that the Borough does not tend to pick up footloose regional or national requirements.

4.120 Table 4.10 shows that between 2013 and 2016 annual office take-up averaged c. 30,000, sq ft per year across 35 transactions. As with the industrial data, the 2017 is analysed up until October 2017. Annual take-up of just 30,000 sq ft per annum highlights the small nature of the office market.

Table 4.10 Annual office take-up 2013-2017 (all occupational deals)

Year	No. of transactions	Total take-up sqft
2013	11	51,258
2014	10	21,140
2015	6	19,181
2016	8	28,815
2017	3	19,580
Total	**38**	**139,974**
Annual average 2013 - 2016	**9**	**30,099**

Source: EGi, AspinallVerdi (2017)

4.121 Table 4.11 shows three quarters of transactions are under 5,000 sq ft since 2013. 18% of these transactions were under 1,000 sq ft and 58% were between 1,000 sq ft - 5,000 sq ft.

Table 4.11 Office take-up by size 2013-2017 (all occupational deals)

Size range	Total No of units	% of units by size range
up to 1,000 sqft	7	18%
1,001-5,000 sqft	22	58%
5,001-20,000 sqft	8	21%
+20,000 sqft	1	3%
Total	**38**	**100%**

Source: EGi, AspinallVerdi (2017)

4.122 Due to the small size of Swale's office market, the EGi data is unlikely to capture all office deals over this period. But it does provide a good indication of the size of units, and general quantum of space being taken up.

4.123 Agents report that occupiers typically look for short term leases, usually with regular breaks giving tenants flexibility. A number of local businesses have a preference for freehold properties. Often this is down to the increased security being an owner occupier. Some directors have acquired their business premises for their pensions.

4.124 Occupiers will take space where it comes available. The majority of demand is around Faversham, Sittingbourne and Sheerness. There is less demand for out of town offices than in the town centres.

4.125 As mentioned in the industrial section there are a number of good examples of small industrial units built out both in Faversham and Sittingbourne that are quasi used for offices. These are often fitted out with a mezzanine floor and have a large proportion of office space. In fact, agents and developers report that there is demand from office occupiers for this flexible industrial space because it is cheaper than a new build office, it provides flexible space and it is available. Recent developments like the

Foundry, in Faversham, have had occupiers take space either using it the unit all/ or predominantly for office uses.

Supply and market balance

Overview

4.126 Table 4.12 shows that there are 14 units available which equates to a total of 49,102 sq ft. This is against a total stock of 536 units / 810,000 sq ft registered on VOA. Therefore, there is a current vacancy rate of 6.1% of floorspace and 2.6% of number of units. If we cross reference the availability in Table 4.12 with annual take-up (shown in Table 4.10); the availability across the Borough equates to 1-year 7 months in relation to number of units and 1 years 8 months' supply in relation to floorspace. Vacancy is low, and there is a general lack of available supply in all areas.

Table 4.12 Availability of office space

Total Stock	810,000 sqft	536 units
Availability	49,102 sqft	14 units
	6.1%	2.6%

Source: EGi, VOA, AspinallVerdi (2017)

Faversham

4.127 Table 4.13 shows that there are 3 units available on EGi against a total stock of 110 units registered on VOA. Most of the office stock is in the town centre under 1,000 sq ft. Vacancy is highest between 1,000 – 5,000 sq ft with 3 units available. Agents report that demand comes from occupiers seeking smaller office suits, under 5,000 sq ft. Overall vacancy is low in Faversham and agents report that though there is demand for space but acknowledge that this is not the focus of the market.

Table 4.13 Faversham stock and availability

Size range	Total No of units	% of units by size range	No. of units available	% of units available
up to 1,000 sqft	74	67%	0	0.0%
1,001-5,000 sqft	32	29%	3	9.4%
5,001-20,000 sqft	4	4%	0	0.0%
+20,000 sqft	0	0%	0	0.0%
Total	**110**		**3**	**2.7%**

Source: EGi, VOA, AspinallVerdi (2017)

Sittingbourne

4.128 Table 4.14 shows that there are 8 units available on EGi. This is against a total stock of 205 units registered on VOA, equating to a vacancy rate of 3.9% of units. Sittingbourne has the most offices in terms of stock of anywhere in Swale. Much of the stock is under 1,000 sq ft, with 118 units on the VOA. Vacancy is higher in the 1,000 – 5,000 sq ft size band with 4 units available and 2 available between 5,000 – 20,000 sq ft; with vacancy rates of 5.7% and 15.4% respectively. All the available stock is second hand, varying in quality. There are some units available with modern specifications and of good quality at Conqueror Court which was built in the last 10 years. Overall the market is generally in balance.

Table 4.14 Sittingbourne stock and availability

Size range	Total No of units	% of units by size range	No. of units available	% of units available
up to 1,000 sqft	118	58%	2	1.7%
1,001-5,000 sqft	70	34%	4	5.7%
5,001-20,000 sqft	13	6%	2	15.4%
+20,000 sqft	4	2%	0	0.0%
Total	**205**		**8**	**3.9%**

Source: EGi, VOA, AspinallVerdi (2017)

Sheerness/Queenborough

4.129 Table 4.15 shows that there are no units available on EGi. This is against a total stock of 102 units registered on VOA. The vast majority of office stock is small, less than 1,000 sq ft. This reflects the nature of the towns, with almost all office space looked in the town centres above shops. Agents report confirm the figure as they highlight that the market is very tight in these areas.

Table 4.15 Sheerness/Queenborough stock and availability

Size range	Total No of units	% of units by size range	No. of units available	% of units available
up to 1,000 sqft	81	79%	0	0.0%
1,001-5,000 sqft	19	19%	0	0.0%
5,001-20,000 sqft	2	2%	0	0.0%
+20,000 sqft	0	0%	0	0.0%
Total	**102**		**0**	**0.0%**

Source: EGi, VOA, AspinallVerdi (2017)

Rural Swale

4.130 Table 4.16 shows that there are 3 units available on EGi. This is against a total stock of 119 units registered on VOA therefore equating to a vacancy rate of 2.5% of units. Similarly, to Sheerness/Queenborough the vast majority of stock is under 1,000 sq ft. Vacancy appears high over 5,000 – 20,000 sq ft, this is because the VOA only lists 2 properties in this size band, with EGi showing one as available.

Table 4.16 Rural Swale stock and availability

Size range	Total No of units	% of units by size range	No. of units available	% of units available
up to 1,000 sqft	89	75%	0	0.0%
1,001-5,000 sqft	28	24%	2	7.1%
5,001-20,000 sqft	2	2%	1	50.0%
+20,000 sqft	0	0%	0	0.0%
Total	**119**		**3**	**2.5%**

Source: EGi, VOA, AspinallVerdi (2017)

Rents

4.131 Rent for good quality second-hand office space in the Borough, which is let on traditional lease terms, range between £16 - £17 psf - this is being achieved at Conqueror Court, in Sittingbourne. The rents at Conqueror Court have increased in the past 5 years, due to tightening supply and good demand.

4.132 The general tone of rents is difficult to estimate as there is a lot of variation depending on the size and quality of the units. Agents report that rents range between £6 - £12 psf. The units achieving these levels of rents are located in the town centre, usually above retail units.

4.133 For development to be viable agents report that rents would need to be over £20 psf. But even then, a pre-let on institutional lease terms to a blue-chip covenant would be required to ensure viable development. Rents would need to be closer to £30 psf to try and stimulate a speculative market.

4.134 Office occupiers who take space in flexible small industrial units are likely to pay £9 - £10 psf. This is in line with more industrial occupiers who take space in the small developments.

Development opportunities

4.135 There is limited opportunity for the development of traditional offices in any area of the Borough. Small purpose-built offices in the Borough are unviable which makes it challenging to bring development forward. Our evidence shows that occupiers are prepared to be flexible in how they use their accommodation through using good quality light industrial units as offices, part or in whole. Smaller, more industrial style units have cheaper build costs and more affordable rents/capital values to occupiers. units can be fitted out dependant on the occupier. This can include building industrial units with the option of a mezzanine first floor and windows in higher up the buildings. This format of development is generally viable.

4.136 Generally, office occupiers prefer to be in the urban areas with good amenities so any development in this quasi light industrial format should be targeted around Sittingbourne, Faversham and Sheerness/Queenborough.

4.137 Although we consider demand to be weak it is worth Swale keeping a careful eye on the nearby Canterbury market. Faversham is seen as a substitutable location for some Canterbury demand including small flexible offices. The two towns are geographically close but also share similar characteristics. Canterbury (as with many other towns) has lost office stock to permitted development. However, at the moment, Canterbury still has a large pipeline of new employment land allocated in their recent development plan (adopted 2017). Further potential capacity is available as part of the large residential led urban extensions. Unlike some industrial demand (esp. larger warehouse units) most Councils are eager to promote office development and so demand displaced by a stock shortage elsewhere is not very common. However, should development in Canterbury not come along as expected Faversham may benefit.

Conclusion: the office market

4.138 Currently office rents are reasonably low, but occupier demand is steady. The secondary nature off the office market means purpose-built development is currently not viable. Availability is low, but the office market is broadly in balance and there is no evidence to support allocating land for office development in the Borough. The focus for offices should be on refurbishment of existing stock or providing good quality industrial space, which can be used flexibility by office occupiers, which is already happening. This provides the most cost-effective solution in bringing more modern space into the market. In fact, agents state that flexible space is often more suitable for office occupiers as they often use part of the unit as a workshop, or storage space.

Kent Science Park

Introduction

4.139 For our market analysis of the science park sector, we provide:

- a definition of the market, science parks can refer to a number of different types of facilities. Here we provide our definition for the purpose of our analysis.
- an outline of what makes a good science park? We provide analysis of Cambridgeshire and Oxfordshire; both of which have large concentration of science parks. This provides an assessment of what the characteristics are for successful science park that are linked or not linked to universities.
- an assessment of Discovery Park; the other large Science Park located in Kent.
- an assessment of Swale science park market i.e. KSP.

4.140 Data on take-up of science parks is not widely published therefore we have relied on agent consultations and published research reports by commercial property agents.

Defining the market

4.141 Science parks (also known as research parks and technology parks) are facilities that emerged in the UK in the 1980's, and have increased in number and size throughout the 1990's and 2000's. Today there are multiple examples of science parks around the country specialising in a number of different sectors and research fields. The UK has relied on these parks to help it to progress in highly skilled scientific and technology sectors. Successive public and private sector institutions and businesses, have promoted the use of science parks as integral areas for innovative and scientific discovery.

4.142 The United Kingdom Science Park Association (UKSPA) provides a broad definition of a science park. In short, a science park is an area that supports business and research institutions to transfer research and technology initiatives The USKPA outline three specific science park criteria, they must:

- "Encourage and support the start-up and incubation of innovation-led, high-growth, knowledge-based businesses.
- Provide an environment where larger and international businesses can develop specific and close interactions with a particular centre of knowledge creation for their mutual benefit.
- Has formal and operational links with centres of knowledge creation such as universities, higher education institutes and research organisations."[7]

4.143 Generally, it is assumed that a science park is a centrally managed collection of properties which can include specialist facilities, laboratory space, office space and light manufacturing space. Usually science parks are master planned and have a mix of different types of amenities, including cafes, children nurseries and conference facilities.

4.144 The format of UK science parks has changed over the past 10 years with more of a focus now on smaller units for start-ups and SMEs. This has changed the dynamic of the real estate market. A constant demand for small units has decreased supply. Furthermore, there is a constant cycle of companies merging and being acquired by larger companies, creating demand for medium and larger units as well.[8]

What makes a good science park?

4.145 Cambridgeshire and Oxfordshire are considered to be two of the most established areas for science parks in the country; both have multiple science parks in and around the cities and universities. Both cities specialise in bioscience (life sciences) and technology sectors (including; electronics, IT). Table 4.17 provides a lists of major science parks in Oxfordshire and Cambridgeshire, along with their size and example occupiers. Of the example science parks in Table 4.17 some have a very specific focus on one sector i.e. Cambridge Bio-Medical Campus, which specialise solely in bio-science and medical research. However, most science parks have a more diverse range of sectors, and in some cases (e.g. Milton Park) they are a science/business park hybrid.

Table 4.17 Oxford and Cambridge Science Parks

Name	Size (sq ft)	Example Occupiers	Focus of industry	Owned by Uni.
Oxfordshire				

[7] United Kingdom Science Park Association

[8] Savills, 2017, Size no longer matters in Cambridge

Name	Size (sq ft)	Example Occupiers	Focus of industry	Owned by Uni.
Milton Park	3 million	Immunocore, Evotec, ResMed, Taylor & Francis Group, DHL, ITV, Londis, RPS	BioScience, IT & Technology	
Oxford Science Park	450,000	Croft Associates; Montcalm International	Atomic Energy	Yes
Culham Science Centre	n/a	CellCentric, Organox, Ocford MEStar, Oxular, Solution 7 PowerTrib	BioScience, Genera	
Begbroke Science Park	300 acres	Adaptix Imaging, Animal Dynamics Limited, Chemocentryx, Microbial Solutions Ltd, Population Diagnostics	BioScience, Atomic Energy and Technology	Yes
Oxford Technology Park	400,000	Under Construction	Under Construction	
Cambridgeshire				
Babraham Research Campus	260,000	Cambimune, Cancer research, Gen2 Neuroscience, Kymab, New Path, Zfactors	BioScience	
Cambridge Research Park	400,000	Elecheck, Sectrum Management, Valliant, Diomed and Horizon Discovery	BioScience & General Engineering	
Cambridge Science Park	1.65 million	Nobelight, Johnson Matthey Catalysts, Kiss Communications, Pharmorphix, Philips Research, Solize UK,	BioScience & Technology	Yes
Cambridge Bio-Medical Campus	2.3 million	GlaxoSmithKline, AstraZeneca, Cambridge University Hospitals NHS Foundation Trust,	BioScience & Medical	Yes
Granta Park	1.1 million	Pfizer Research Centre, One Nucleus, Ista, Alzheimers Research UK, UCB	BioScience	
St Johns Innovation Centre	250,000	AlphaBio Control Ltd, Bailey Fisher, Cambridge Therapy Centre, Ellexus Ltd	BioScience, Technology, IT & Electronics	
Melbourn Science Park	200,000	AstraZeneca, Avita Medical Europe, TTP Labtech, TTP Venture Managers	BioScience	
Chesterford Research Park	350,000	Charles River, Illumina, Isomerase Therapeutics, UKSPA, DRW, TLIP, AstraZeneca, CellCentric	BioScience	

Source: JLL & Individual science park websites (2018)

4.146 The success of science parks in Oxford and Cambridge is down a number of reasons. A key attribute of both is the world class universities located in the cities. This provides the academic resource required to make advancements in the research carried out in the parks. Oxford Science Park and Begbroke Science park are both owned by Oxford University; and Cambridge Science Park and Cambridge Bio-Medical Campus are both owned by Cambridge University. Those science parks that do not have direct connections to universities can still benefit their geographic position in acquiring skilled resource. A further benefit in the regions is the critical mass of numerous science parks in the area. This creates the potential for competition and the sharing of academic resources. Savills report that access to academic resource has been the key to the success of science parks in the Cambridge region.[9]

4.147 Another competitive advantage of both Oxford and Cambridge is their strong office markets where development appears to be viable. Prime rents in Cambridge are as

[9] Savills, 2017, *What Makes a good science park?*

high as £38 psf[10] and £36 psf[11] in Oxford. This provides a good opportunity for science parks to let space to non-science related activity.

Milton Park

4.148 While Oxford and Cambridge represent the typical model of a Science Park there are variations on the theme. Some of these alternative models may offer a template for Swale given the absence of a 'top tier' research university.

4.149 Milton Park stands out as being the largest science/business park in the Cambridgeshire and Oxfordshire areas, with over 3 million sq ft of space. But interestingly, similarly to Kent Science Park, it does not have a direct link with a university. Milton Park is currently owned by MEPC, an asset manager with a specific focus on business and science parks. Part of the park also benefits from EZ status, this recently expanded by 17 acres in 2017, and now totals 70 acres.

4.150 Milton Park is located west of Didcot on the A34. Didcot lies around 13 miles south of Oxford city centre and 15 miles north of junction 13 of the M4. The A34 provides a direct link from junction 13 to Milton Park. Milton Park is approximately 2.5 miles west of Didcot Parkway railway station; this provides direct links to Oxford, Reading, Swindon, Bristol and London Paddington; all under an hour's travel time.

4.151 Milton Park lies in the Thames Valley which is an established office location with a range of national and international occupiers. The Thames Valley also includes areas such as Newbury, Bracknell and Reading.

4.152 Good connectivity, location and lack of direct link to a university has meant that Milton Park has diversified away from just science park activities. The park has a mix of office, laboratory and warehouse space, which suits a wide variety of occupiers, from science and non-science related activities. Units vary in size with smaller start up space available i.e. under 5,000 sq ft and larger units for more established occupiers of 70,000 sq ft and above.

4.153 In recent years Milton Park has focused on design and build development supplemented with small amounts of speculative development. Design and build opportunities have been favourable as it allows the owner to develop units in response to the market i.e. when there is occupier demand. The most active year for development since the economic crisis was in 2016 where four units were built out;

- 55 Western Avenue – 44,000 sq ft of office space. This was a bespoke design and build with a pre-let in place to Schlumberger (Oil and Gas).
- 60 Jubilee Avenue – 67,000 sq ft of office and lab space. This unit is now occupied by an existing occupier on Milton Park Adaptimmune (Pharmaceuticals).
- 155 Brook Drive 18,000 sq ft of warehouse and offices (Park, DC Payments). This was a bespoke design and build development.

4.154 There are office units with ancillary laboratory space currently being developed at the site Park Drive East. This is a collection of three units totalling 110,000 sq ft. One of

[10] Bidwells, 2017, *Cambridgeshire Office & Labs Autumn 2017*
[11] Savills, 2017, *Market Watch: Oxford Office Market*

the units has a pre-let in place for 27,000 sq ft to Oxford Immunotec (Pharmaceuticals). The remaining two units are being developed on a speculative basis and can accommodate requirements of between 5,000 and 42,000 sq ft.

4.155 There is still land available at Milton Park at Park Drive Central, a total 9.5 acres with a total capacity of c. 290,000 sq ft. The site is currently being marketed for laboratory or office space in buildings between 35,000 – 70,000 sq ft. There are a number of other sites which have been earmarked for further expansion, with a small amount of land to the south and a larger plot to the north east of the exiting estate.

4.156 Recent transactions show that rents of £26 psf are being achieved at Milton Park for units over 60,000 sq ft. At these rental levels development is viable.

Kent Science Park Market – Discovery Park

4.157 The closest major science park to the KSP is Discovery Park; also located in Kent at Sandwich. This 1.5 million sq ft facility has changed since it was sold by Pfizer in 2011. The park has received public funding since its sale in 2011, which has helped in its redevelopment as a multi-business science park. The facility now offers space to science/technology-based occupiers and general office occupiers alike, being marketed as *"The global hub for science, technology, business & enterprise."*[12] Discovery Park also benefits from a direct link with Canterbury Christchurch University, and its designation as an EZ.

4.158 The occupiers at Discovery Park are diverse with a mix of local and national companies. In 2017 Alert Technology (Asbestos R&D), Digital Automation (Office equipment supplier) and Gemini Lotto Fundraising (Professional services); were among occupiers who took space in the park.[13] All take up was available units within the existing buildings.

4.159 Discovery Park is attractive to larger pharmaceutical companies and local business alike due to the high specification of the space and available existing buildings which can be immediately occupied.

4.160 Rents of c. £12 psf are considered competitive for the area to the east i.e. Ashford and Canterbury are more expensive for the same specification space. When compared to other areas such as Dover, Folkestone or Thanet; firstly, the quality of space available at Discovery Park is not available in these areas; and secondly the rent of £12 psf achieved at Discovery Park is only a slight premium over local market rents therefore offers better value for money.

4.161 The site has had a masterplan since 2014, to manage the park and plans for future growth. The park was sold in 2016 and the new asset managers, Maritime Capital, are reported to be in the process of investing £5 million pounds in the site. This includes a 50,000 sq ft laboratory expansion to Discovery House, and a further 60,000 sq ft increase of office space. A new biomass power plant has also been completed, which will not only provide clean energy to Discovery Park, but will also create new jobs and provide electricity to the surrounding area.

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[12] Bidwells, 2017, Cambridgeshire Office & Labs Autumn 2017

[13] Caxtons, 2017, Kent Property Market

4.162 For Swale, Discovery Park obviously represents competition for true science park demand in the County, and competition which can accommodate growth without the substantial new investment needed at KSP.

Science Park in Swale - KSP

4.163 KSP was originally built by Shell in the 1980s as a specialist research centre, and is a low rise, low density campus style development with a range of buildings that include offices and specialist research buildings. It is located in the south of the Borough near to the route of the M2 motorway. Central Sittingbourne lies approximately 2.3 miles to the north of the park. Road connections to both the M2 motorway and Sittingbourne are through B-roads, and there is minimal public transport connectivity to the site.

4.164 Currently the park comprises circa 500,000 sq ft of accommodation, including a number of units developed on a piecemeal basis since Shell vacated the park. The park houses a large number of different employment sectors such as pharmaceuticals, testing laboratory for the construction industry, – cosmetic industry research, advanced engineering/manufacturing, manufacturing and supply of electronics, fabrication of steel and aluminium and office uses such as mortgage brokers, IT support and charity fundraising. Unlike the majority of competing science parks, the KSP is not directly connected to a university. But as Discovery Park and Milton Park demonstrate this is not necessarily a pre-requisite for a successful technology focused site. But what does constrain the site is a lack of access. This limits market appeal, but also represents an absolute block on delivering strategic new development here.

Demand

4.165 Site agents and local agents report that the KSP is in demand from a mix of occupiers. There is reasonable amount of interest from bioscience occupiers and high-tech engineering firms. But the site also absorbs local demand for offices. Due to the lack of purpose-built office space elsewhere in the Borough, office occupiers with no connection to science or technology sectors also demand space (i.e. accountancy firms, professional services etc.). The reasons for its attraction can be summarised as it is cheaper than office parks elsewhere, most noticeably in Medway, and is also better quality than town centre stock.

4.166 There is less demand for space that is not flexible. A lot of the existing space, especially the larger units, are designed for specific science uses. These units are less in demand. Occupiers from both scientific and general B class employment uses require flexibility to allow for future expansion or changes in day to day operations.

4.167 At the stakeholder event agents agreed that demand for space in the KSP is from a mix of sectors, both science related and more general, making the science park more akin to a cross between a science and business park.

Supply

4.168 Availability in the KSP has fluctuated in recent years with some new space being built out and subsequently occupied. We have not been able to obtain occupancy/vacancy figures from the managing agents, but we do know that the number of different companies who occupy space in the park has increased. However, there have also been some loses with occupiers such as Dovetail, Go Response, and Novartis leaving the park for what we understand to be business restructuring reasons involving consolidation with other national locations.

4.169 The most recent new development is a ‘Hub’ conference facility. This does not provide any more employment space, but will make the location more attractive to occupiers as it will provide amenity and conference facilities.

Development opportunities

4.170 Within the park there are already examples of units being refurbished and there is an ongoing opportunity to continue to refurbish stock over next few years. There are build-to-suit opportunities for bespoke buildings up to 100,000 sq ft on available land around the KSP. This has reportedly been available for a number of years. This scale of development would not require major upgrade to infrastructure.

4.171 There are proposals by the owners of the park to expand the KSP to become one of the largest science parks in the country. The proposals would rival both Oxford and Cambridge Science parks in size.

4.172 Quinn Estates are the developer promoting the site. They state their plans are;

> *“Extension to Kent Science Park to facilitate new commercial space and a new business community, the creation of the southern relief road and creation of J5a off the M2”*[14]

4.173 Quinn Estates have already submitted an EIA screening application and plan to submit a full planning application in 2018. The specific plans included in the EIA application are:

- 11,250 new homes
- Circa. 1.3 million sq ft expansion to the science park
- Upgrades to J5a of M2[15]

Conclusions

4.174 Below we consider the future of the KSP – firstly a ‘business as usual’ scenario; where growth is constrained by the access limitations and then we consider the possible large scale expansion of the KSP. As noted above we understand that there may be proposals coming forward to expand the park linked to major access improvements to serve such a development and the wider area. But there are few details about what is proposed in terms of employment offer. This is not a criticism of the proposal – because it is at the very early stages – so here we speculate based on our evidence about what form the expansion could take.

Business as usual

4.175 Our market analysis indicates that KSP is performing well with reasonably strong demand from a range of occupiers. There is a broad range of sectors already occupying the park; including those you would associate with a science park function

[14] Trinity IM & Quinn Estates and Kent Science Park: J5A and The Southern Relief Road

[15] EGi, 2018, EIA application submitted for Kent Science Park expansion

(e.g. biosciences) and those you would not (e.g. advanced manufacturing in industrial units, and professional services in office space).

4.176 Currently supply and demand appears balanced in the KSP. But we do not have sufficient data on rents, voids and maintenance costs to assess whether these are sufficient to maintain the park for the foreseeable future.

4.177 Agents report that current demand for space in the KSP is from a mix of uses, reflective of the type of occupiers already located. But the majority of demand reported, is from office-based occupiers, in some cases already based locally. The KSP offers some of the highest quality office space in Swale, so is often the first-place occupiers will look if they require space of a high specification. So there is evidence that the KSP has been competing with other sites in Swale for office demand and because the KSP has a comparative advantage - with a stock of property and infrastructure pre-existing – it has absorbed demand that may (under different circumstances) have been accommodated elsewhere in the Borough, although there is a chance that were space not available at KSP businesses may have looked outside the Borough.

4.178 As new space is made available, and because of the access constraints, it is likely that these will (as in the past) compete for higher quality occupiers from the local market. There is scope to grow the core science park market on the site, but this is limited due to the small scale of the core market. The most likely ‘business as usual’ case is for a mix of occupiers. This is not necessary a negative conclusion because as we show elsewhere most science park type development s have a mix of uses all of which combined contribute to the success of the site as a whole.

KSP ‘big bang’ option

4.179 Growth of the Science Park is somewhat stuck with a dilemma. Significant organic growth is constrained by the lack of access to the site. So to grow KSP requires a ‘big bang’ option. This is most obviously, a new junction to the M2 and a new local road network to the South and South West of Sittingbourne. The infrastructure package to open the area for development will be very significant; a new motorway junction could exceed £100 million – although options will differ and this can only be an indication at this stage. A new motorway junction will bring significant benefits and opportunities to Sittingbourne more widely, which further complicates the cost benefit assessment of this option.

4.180 Because employment space is highly unlikely to make any meaningful contribution to pay for this infrastructure, funding this investment requires a significant amount of cross-subsidy from housing and/or public sector grant of some form (with the former being most likely).

4.181 We understand that this is the draft rationale for the proposed 10,000+ dwellings (coupled with the KSP expansion) currently being promoted to the Council. The draft proposal is for a 1:1 relationship between homes and jobs; so 10,000+ jobs.

4.182 It is clearly unrealistic to package the 10,000+ jobs as ‘science park’ jobs. Should the proposal come to fruition only a small minority of the jobs would be science park. The most likely scenario is akin to the Milton Park model discussed above.

4.183 As a mixed employment site, with a new access, the site has considerable merit. For offices we know that local firms are attracted to the site, and where property has been made available it has been taken up. There is no reason that this should change were space to be provided going forward.

4.184 It is also *possible* that the site could attract additional regional (or sub regional) footloose demand for offices. But we are cautious about relying on this to justify any proposed allocation. This is because the regional market has a considerable 'overhang' of office supply, and a queue of Councils eager to promote high quality office allocations if and when the market tightens. It is questionable whether Sittingbourne, even with a new junction, could compete with Ebbsfleet and Discovery Park for true science park activity. Many competing locations can deliver new office space without the need for whole new motorway junctions.

4.185 As a mixed site, we note that there is strong demand from industrial occupiers in Swale and much less regional competition. An expansion of KSP with the proposed infrastructure could capture some of the industrial demand in the Borough and wider area. If a new junction was constructed on the M2 there would be market demand for this location. This could include medium and larger sized warehouse units for which the new access would make the broad area highly attractive.

4.186 This mix would make the aspiration to deliver a 1:1 home to job ratio challenging because industrial and warehousing is a less efficient (in terms of job creation) use of land. But we note that it is unlikely that a 1:1 ratio is needed, because we would expect any new homes in this area to provide labour for the Borough as a whole.

Summary

4.187 The KSP is a complicated site to assess. 'Business as Usual' growth will, at some point, hit the transport capacity constraint, the implications of which are by no means restricted solely to the KSP, and have much wider implications across the Borough. Until that point KSP will continue to absorb limited science park related demand, but also the Borough's higher quality office demand.

4.188 Looking forward, this strategic transport constraint can only be removed with a 'big bang' option potentially costing hundreds of millions of pounds. This, would most likely be delivered through a development package including 10,000+ new homes but would also result in benefits to Sittingbourne including existing residents who would benefit from the new infrastructure and also the existing employment estates. Improved access around Sittingbourne, with a new junction and completion of the northern link road, would benefit Eurolink for example.

4.189 To summarise the future of KSP it is useful to establish what Swale 'needs' from what it may 'aspire to'.

4.190 In terms of 'need'; the KSP proposal offers a good quality supply of new land which will meet local needs. But this is not the only site which could be promoted to meet local need. In this context there is no evidence to say that this option is the only route to meeting the needs of the Borough. Other, easier to deliver already allocated or potentially allocated sites that are not reliant on a whole new motorway junction that could be delivered with improvement to the existing highway network, and could meet local needs over the life of the development plan.

4.191 In terms of what the Council may 'aspire' to, the Science Park proposal allows the Borough to compete with other areas to grow the Science Park, and try to attract sub-regional demand to Sittingbourne. This is in additional to meeting local needs for industrial, office and warehousing. Expansion of the KSP would need to deliver a new motorway junction, that in turn would address the transport constraint for Sittingbourne in particular, and may prove to un-constrain development in Sittingbourne more generally. It would improve access to existing established estates in and around the town and so result in wider economic benefits.

4.192 As an aspiration, this route clearly caries significant risk and promoting land here would be at the expense of other sites elsewhere. This includes limiting growth options in the other towns in the Borough that may otherwise try to compete for strategic office demand. But this route, a KSP 'big bang', offers a possible step change in the local market, which a less aspirational approach is unlikely to deliver.

4.193 In this report we cannot judge whether the merits and potential rewards of a more aspirational approach justifies the wider supporting package and the risks.

Sheerness Port

Introduction

4.194 The Port of Sheerness, located on the Isle of Sheppey, is a major contributor to the economy of the Borough. The port's main activity is automotive industry with the importation of cars. A large quantity of imported timber also passes through the port, with the Medway being one of the main points of entry to the UK.

4.195 The port has plans to expand around its primary function, and has produced a 20-year growth strategy masterplan. The plans are ambitious and include land reclamation to extend the ports boundary by 71 acres and provide a marina development supplemented a mix of other uses. There are also plans to remove the historic Port estate from the Port Boundary. The area is a collection of historic listed buildings which would benefit from regeneration through being converted to a mix of retail, leisure and office uses.[16]

4.196 Peel Ports have acquired the former Thamesdale steel site that closed in 2012 and is now known as Wellmarsh, to the south east and the core port operation, on the opposite side of the A249. The rationale for this acquisition is to utilise the rail freight link already operational on the site. The site has recently been connected to the rest of the port through a bridge over the A249. The site has now been cleared and is being developed to store and distribute commodities such as cars, steel and timber.

4.197 The masterplan is not a statutory document and the port is not required to deliver their proposed strategy. Development within the port boundary itself is difficult for the local authority to directly influence through the planning system. Ports are subject to permitted development rights and are allowed to develop within their operational land so long as the development is related to shipping or the transportation of goods

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[16] Peel Ports Group, 2016, *Sheerness Port Masterplan*

inland.[17] But, any future development at the port will not only increase jobs but may increase demand for employment space outside the port boundary.

Demand

4.198 Within the Port demand comes from port related activities i.e. from car importers. The acquisition and development of the Wellmarsh site was partially in response to demand from existing occupiers, including GEFCO and Volkswagen. The further plans for expansion show that Peel Ports see that there is not enough space for their current operations, and there is likely to be continued demand going forward. Land at Rushenden Marshes is being promoted by the Port as land suitable to cater for an expansion of port activity.

4.199 As discussed in the demand section for Sheerness and Queenborough occupiers located close to the port, are often related to port activities, and are generally involved in heavy industry. Agents report that there is an opportunity with the port, that currently is not being maximised. Demand will likely be for medium sized units, which is generally larger than the rest of the Borough. These are the type of units currently required from the occupiers supporting the port related activities in Sheerness.

Supply market balance

4.200 Current land supply is limited, and as discussed above Peel Ports are currently in the process of trying to expand their boundary. The increase of available land for the port is vital to the ongoing success of the area. Imports are forecast to increase to the port and both property and infrastructure will have to be improved to meet increased demand.

4.201 Outside the boundary of the port there is almost no industrial availability. There may be opportunities for development, especially around the Wellmarsh site. Not only will the development of a rail freight terminal aid the port related activity to distribute goods, there will also be a potential increase in demand for space from occupiers who will support these activities.

Conclusion

4.202 The plans for wide scale growth at the port are ambitious. And even with partial delivery of the proposals the port will grow as a key employer in the Borough. A number of proposals are for mixed use development i.e. potential regeneration of the historic area north of Blue Town; and within the marina. But these proposals are for office space which is a smaller market than industrial, and only in demand from local occupiers. Any increase in office space in the area would require a change from the current market dynamic in Sheerness. There is an opportunity around the port going forward for industrial space. This could be brought forward as part of the wider regeneration, but specifically would benefit from being located near the new rail terminal.

[17] The Town and Country Planning (General Permitted Development) (England) Order 2015, No. 596 (Part 8 B)

5 THE DEMAND FOR LAND IN SWALE

Introduction

5.1 In this section we look at the future demand for employment land in Swale in quantitative terms. This compliments the qualitative analysis in the previous section that was based on short term property market evidence.

5.2 Government Planning Guidance, set out in the PPG prescribes two methods to estimate the quantitative demand for land, past take-up and labour demand and in this analysis we use both to develop a longer term view.

5.3 Below, we first introduce the labour demand forecast approach, which is based on data supplied by Experian Economics, and then the past trends approach that is based on Kent County Council (KCC) starts and completions monitoring data.

5.4 We then move on to consider:

- The demand, supply and market balance for B1a/b offices
- The demand supply and market balance for B1c/B2/B8 industrial uses
- The demand for new land at the Kent Science Park (KSP)
- The demand for jobs outside the ‘B’ class uses; including leisure and the visitor economy.

Method - the Economic Forecast

5.5 The use of economic forecasts to inform planning evidence is well established. In this case we use an Experian forecast; one the three main economic forecasting houses in the UK. Data from Experian was used to inform the housing economic policies of the recently adopted Swale local plan, and so continuity of forecasting source will provide an internal consistency in the data.

5.6 The full raw data Experian forecast is presented at Appendix C. The explanation for how we split the economy into the B class sectors for the purpose of the employment land review, a process referred to as sector to land use mapping is set out at Appendix A. In summary, the process involves identifying a land use classification for each of the 733 five-digit Standard Industrial Classification employment activities. In this way we can identify job change by land use.

5.7 When we come to convert a jobs requirement to a land requirement we apply employment densities in line with best practice guidance[18], and assume a 40% plot ratio (i.e. one hectare accommodates 4,000 sq m of employment space).

5.8 This plot ratio is industry standard for industrial and warehousing uses. For offices, especially urban (town centre) offices higher densities can be achieved. But in this study we use 40% because this reflects market demand for lower specification, cheaper to deliver floorspace. Partly because the Borough has not been able to viably deliver higher density, higher specification offices in the past. It is also the case that businesses that use office space continue to improve the efficiency of use,

[18] currently the HCA, Employment Density Guide, Third Edition, 2015

but this increase in employee density increases the demand / need for car parking on site. Our use of 40% is probably erring on the cautious side, but reflects plot ratios in many modern office schemes in non-town centre environments.

5.9 Using the above mentioned method the Experian economic forecast the jobs generated are shown in the table below:

Table 5.1 Swale job numbers 2016 and 2036, and job change

	2016	2036	Change	
Office (B1a)	8,108	11,484	3,376	42%
Industrial (B1b, B1c & B2)	11,831	11,744	-87	-1%
Warehousing (B8)	7,257	8,355	1,097	15%
All B class	**27,196**	**31,583**	**4,387**	**16%**
Non-B class	*31,604*	*37,717*	*6,113*	*19%*
All Jobs	**58,800**	**69,300**	**10,500**	**18%**

Source: Experian September 2017, and PBA analysis

5.10 The forecast set out in Table 5.1 shows a substantial slowdown in the rate of job number change across all sectors when compared with the past (comparison with Table 3.3) The rate of change in the 2000/16 period was positive for all except industrial - office 66%, industrial -19%, warehousing 31% and non-B 39%. In respect of industrial jobs, the comparison illustrates that the decline in jobs that has occurred through many years of structural adjustment has come to an end, and industrial job numbers are forecast to just about stabilise over the forecast period.

5.11 Overall total job growth 2016-36 is around 500 net additional jobs per annum compared to nearly 700 in the 2000-16 period. Given the economy in Swale is around full employment, and the only source of new labour is migration or increased older age economic activity this is not a surprising finding. It is common across England.

5.12 Growth in the B class sectors is however much stronger in the future. This is mainly a product of jobs in the manufacturing sector, which is no longer declining. This also reflects a much improved national outlook. Mathematically the UK cannot continue to lose manufacturing jobs at the rate seen in the past. Also, for manufacturing activity that is cheaper or more efficient to manufacture overseas, the vast majority of firms have completed this switch. Finally, there is evidence of some firms 're-shoring' manufacturing. The cost and quality balance of UK manufacturing compared to overseas has in some manufacturing sectors shifted back in the UK's favour.

5.13 The forecast for warehousing employment is much weaker than reported in the past. But this reflects a known shortcoming of economic forecasts. Warehousing is footloose, and large warehousing can serve sub-regional, regional or national needs and follows supply across administrative boundaries. It cannot be quantified by the economic forecasters in the same way as other jobs/land uses. The forecasters don't know about the balance of supply in the wider market. So, for example they don't know that other parts of the South East may be 'full', and this demand will therefore be displaced. It is also the case that the demand for some warehouse uses are poorly related to job growth forecasts; what fuels the demand for warehousing is better related to GVA and wealth creation in the economy. For these reasons we cannot use the forecast data to guide a maximum amount of land for large strategic warehouses. If Swale is able to identify new sites, then as it has in the past, there is a probability that footloose demand will be attracted over the life of the plan.

Net to Gross

5.14 Because the economic forecast only provides us with an estimate of 'net change' we need to make an adjustment to translate net change into gross land needed.

5.15 This reflects the fact that even to keep the number of jobs shown in an economic forecast stable (i.e. nil net additional jobs) some new land is likely to be needed to replace capacity lost via windfall losses from the stock.

5.16 In this case, based on data supplied by the KCC, the amount of industrial land lost from the supply each year averages to 2.34 ha each year. This comprises an average of 2.5 ha lost each year but reflects the fact at some sites new space was re-provided in subsequent years.

5.17 Therefore, even for no job growth we still need to allow for this 2.34ha of new land. This 2.34ha is added to the industrial forecast numbers discussed below.

Table 5.2 Swale industrial annual and average overall losses

Industrial Use Class	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	Average over period	
	sq m	sq m	sq m	sq m	sq m	sq m	sq m	sq m	sq m	Ha
B1c	238	571	4,551	1,012	995	3,049	2,267	272		
B1 mixed	216	0	0	0	0	0	0	0		
B2	2,436	0	6,278	37,032	897	398	787	1,938		
B8	4,059	608	1,649	976	3,153	1,166	2,873	2,763		
B1-8 mixed	0	0	0	0	0	0	81	0		
Industrial Total	**6,949**	**1,179**	**12,478**	**39,020**	**5,045**	**4,613**	**6,008**	**4,973**	**10,033**	**2.5**

Source: KCC Business Intelligence Unit, Commercial Information Audit Statistical reports, and PBA analysis

5.18 The largest loss is the Sittingbourne Paper Mill in 2011/12. It is debatable whether a loss of this scale will repeat and so whether it should be included in our trend. But losses like this are, by nature uncertain and we cannot readily predict. The previous plan evidence identified the site as an existing employment site and did not foresee the loss of this site, albeit it did identify that it had recently been sold and its location viz a viz the town centre meant the site could potentially meet some of the Borough's office need. The site was subsequently redeveloped fora Morrison's supermarket and residential, and so for this work we err on the side of caution and include the loss in our calculations.

5.19 A similar adjustment is needed for offices, but this is much smaller and less significant because the Council lost only around 2,000 sq m of stock each year in the past (0.5ha). But as with the industrial land needed we need first make an allowance to replace this floor space before we consider what space is needed to accommodate net change in jobs.

Table 5.3 Swale office annual and average overall losses

Use Class	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	Average over period	
	sq m	sq m	sq m	sq m	sq m	sq m	sq m	sq m	sq m	Ha
B1a	3,126	1,844	1,085	827	2,292	2,377	724	1,652		
B1b	0	1,063	0	0	0	0	0	272		
Industrial Total	**3,126**	**2,907**	**1,085**	**827**	**2,292**	**2,377**	**724**	**1,924**	**1,908**	**0.5**

Source: KCC Business Intelligence Unit, Commercial Information Audit Statistical reports, and PBA analysis

Method - Past take-up

5.20 The second approach used to estimate the demand for land is Past Take-up.

5.21 This is simpler than the forecast discussed above because the County collects data on both gross gains and losses. We don't need to make an adjustment to turn the net (job forecast) into a gross demand for land. We also don't need to make assumptions about what economic sectors need what type of employment space.

5.22 For our work the County has provided take-up data from 2008/9 to 2016/17[19]. This shows both gains and losses of employment floorspace by year and use class.

5.23 As a caveat we note that Kent County Council do not include take-up associated with waste and recycling in their data. So the recent new waste to energy plant at Wheelabrator is excluded from this analysis of past take-up. The County logic would appear to be that waste is a County matter and not one for each district to assess and address and is excluded from their monitoring of employment land take-up. The Council needs be aware of this caveat because should large quantities of the proposed stock of land for employment use be taken up for further waste related activities then this may need to be replaced in a future plan review.

5.24 One complication within the data is that some sites are classed simply as 'mixed' sites – with no breakdown of floorspace by type. This reflects a common issue with the Use Class Order and the modern property market – many permissions, and built units, are flexible and can be used for a range of different employment uses. This relates to a relatively small proportion of the reported floorspace (<10% over the period), and we have in this work addressed the issue by distributing this space 50:50 between industrial and office uses.

[19] To be consistent with other datasets, in the above 'Net to gross' tables we end the data in 2016, and account for the 2016/17 data in the next steps in the calculations.

Trend Period

5.25 Any analysis of past trends can be influenced by the choice of trend period. Here we have take-up data from 2008/09 – 2015/16 (8 years, which includes both the recession and recovery period). Regarding this period there are two points to note.

5.26 Firstly; the 2008/09 data point is influenced by the delivery of the large Morrisons warehouse, and so whether we include (or exclude) this makes a large difference to the analysis.

5.27 To manage this, we have developed two past trends scenarios; the first seeks to estimate the demand for non-strategic industrial land. We do this by excluding the take-up of the large Morrisons' unit (85,000 sq m in the 2008/09 year) from the trend period. We also exclude the recent Aldi distribution depot scheme that is currently under construction, and the portfolio of land we think is likely to be attractive to new warehouse demand over the plan period (the large allocation at Ridham & Kemsley). This is our best estimate of the demand and supply of non-strategic warehousing land.

5.28 In the second scenario we include all these various components. This second scenario shows the full demand for space in Swale, across the full range of industrial types. This second scenario assumes that over the life of the plan the Morrisons scheme repeats once every 8 years, and so provides land to meet this strategic need.

5.29 Secondly; in the data we have the Aldi scheme is not yet complete. So the site to be occupied by Aldi forms part of the supply. Should we roll the data forward, assume the scheme is complete this would dramatically increase the trend based projection of need. The period would include both Morrison's and Aldi and assume each repeats roughly every 8 years. But in our opinion this would be wrong because Aldi could also be seen as one example whereby the Morrisons trend repeats every few years. The fact Aldi is under constriction validates including Morrisons in our trend.

5.30 In the next sections we look at the demand for land using the forecast approach, outlined above and the alternative Trend approach for offices followed by industrial uses.

The demand for office land

Economic forecast

Demand

5.31 Starting with the economic forecast; there is some modest growth in office demand, around 3,400 net additional new jobs.

5.32 Assuming each job requires 13.8sqm, at that at any time 7.5% of the floor space stock is needed for frictional vacancy, we need new land to accommodate 50,000 sq m of stock.

Table 5.4 Swale – net demand for office floorspace 2016-2036

Jobs change	3,376
Floorspace density factor (sq m/job)	13.8
Factor for frictional vacancy (%)	7.5
Floorspace (sq m)	**50,089**

Source: job change - Experian September 2017, and PBA analysis

5.33 To turn this net figure into a gross demand figure (Table 5.5) we make an adjustment to replace some of the negative planning pipeline (increasing demand by just 2,545 sq m). We also make a small further adjustment because the current vacancy rate is only 6.1% and we consider 7.5% is needed.

5.34 These small adjustments increase the need to 54,000 sq m or 11ha of land (at a 40% plot ratio). This provides land to grow jobs, replace the negative planning pipeline and maintain vacancy at 7.5% of stock.

Table 5.5 Swale - gross demand for office floorspace 2016-2036

DEMAND		Sq m GIA
a	Demand (net change) - 2016-36	50,089
b	Allowance to replace future office losses resulting from current planning permissions (sites started and with extant planning permissions for other uses)	2,545
c	Allowance to increase vacant stock to the frictional vacancy rate (7.5% of total stock) *[current vacancy 6.1%, so requires a 1.4% uplift to return to frictional vacancy rate]*	1,083
d	***Gross demand (a+b+c)***	***53,718***

Source: PBA analysis and KCC for planning pipeline data

Supply

5.35 We have assessed the supply of land in the Borough for office development. This is drawn from Kent County Council's latest monitoring data for year 2016/17. We do not list all the schemes and sites that comprise the outstanding permissions and allocations, but a schedule of these is included at Appendix **Error! Reference source not found.**.

5.36 This shows that there is around 22,000 sq m of office space in the pipeline (with planning permission), and a further 36,000 sq m on the unbuilt allocations. So there is a total supply of land to accommodate 58,000 sq m of new office floorspace in Swale.

Table 5.6 Swale - gross supply of office floorspace

	SUPPLY	
e	Existing surplus vacant stock (in excess of the 7.5% frictional vacancy rate) *[current vacancy 6.1%, so no surplus adjustment required]*	0
f	Office planning permissions yet to be implemented	22,024
g	Allocations for offices yet to come forward	35,675
h	***Gross supply (e+f+g)***	***57,699***

Source: PBA analysis and KCC for planning pipeline/allocations data

Balance

5.37 Thus in balance we have a very slight oversupply (58,000 sq m of supply compared to 54,000 sq m of demand). But as noted in the method we need to allow for 2,000 sq m of space to be lost (and replaced) before any net additional job growth. Once this allowance is made we have a small undersupply or 36,000 or 9ha at a low 40% plot ratio.

Table 5.7 Economic forecast - office balance

	FORECAST BALANCE - 2016-2036	
i	**Balance (d-h) (-ve = undersupply +ve = oversupply)**	**+3,981**
j	**Allowance to replace anticipated future losses** (beyond 'b' above) *[based on 2008-16 annual average @2,000 sq m pa, applied to 2017 onwards ie 20 years]*	**40,000**
k	**Final Balance *(i+ j)* (-ve = undersupply +ve = oversupply)**	**-36,019**

Source: PBA analysis and KCC for planning pipeline data

Projection based on past take-up

5.38 Projecting forward past take-up provides a more positive outlook when compared to the economic forecasts. Under this scenario demand is 74,000 sq m increasing to 78,000 sq m once an allowance is made for the small (negative) planning pipeline and a very small adjustment to the vacant stock figures.

Table 5.8 Swale gross demand for office floorspace (past trends)

	DEMAND	Sq m GIA
a	Demand (trend based) 2016-36	74,393
b	Allowance to replace future office losses resulting from current planning permissions (sites started and with extant planning permissions for other uses)	2,545
c	Allowance to increase vacant stock to the frictional vacancy rate (7.5% of total stock) *[current vacancy 6.1%, so requires a 1.4% uplift to return to frictional vacancy rate]*	1,083
d	***Gross demand (a+b+c)***	***78,021***

Source: PBA analysis and KCC for planning pipeline data

Balance

5.39 Supply remains the same as under the economic forecast Experian scenario outlined above (58,000 sq m), but the balance is slightly more negative because the demand under this scenario is slightly stronger.

5.40 Under this scenario land is needed to accommodate 60,000 sq m of space or 15 ha of land (@40% plot ratio).

Table 5.9 Swale office supply and balance (past trends)

SUPPLY		
e	Existing surplus vacant stock (in excess of the 7.5% frictional vacancy rate) *[current vacancy 6.1%, so no surplus adjustment required]*	0
f	Office planning permissions yet to be implemented	22,024
g	Allocations for offices yet to come forward	35,675
h	***Gross supply (e+f+g)***	***57,699***
FORECAST BALANCE - 2016-2036		
i	**Balance (d-h) (-ve = undersupply +ve = oversupply)**	**-20,322**
j	**Allowance to replace anticipated future losses** (beyond 'b' above) *[based on 2008-16 annual average @2,000 sq m pa, applied to 2017 onwards ie 20 years]*	**40,000**
k	**Final Balance *(i+ j)* (-ve = undersupply +ve = oversupply)**	**-60,322**

Source: PBA analysis and KCC for planning pipeline/allocations data

Margin

5.41 We have compared two sources of demand, one economic forecast based from Experian and trend based by projecting forward past take-up. These are two incompatible approaches, with very different methods, and cannot be compared 'like for like'. However, in terms of floorspace and land needed, they both show a positive need for more land. This ranges between 9 and 15 ha.

5.42 It is common for development plans to overprovide land compared to need. This is to provide additional market choice, scope for friction and contingency. One approach is to plan for slightly more land than required in the plan period; by for example providing 25 years' worth of land in a 20-year period. This means that at year 20 of the plan there is sufficient choice in the market equal to 5 years.

5.43 However, in the case, for offices we don't consider there is merit in providing any additional margin. This is because when we translate floorspace into land we adopted a very conservative plot ratio. In this case we have assumed 40% (4,000 sq m per hectare).

5.44 What ratio to use is a matter of judgement and depends on the sites coming forward and the development profile. In urban areas, the plot ratio can exceed 100% and even many out of town sites are now delivered at ~60%. We consider that there is already ample 'headroom' in the 9 – 15 ha to manage any uncertainty. It is quite possible that by allocating this quantum of land the amount of floorspace that could be delivered may be much higher. For this reason, we do not include an additional 'margin' to the office demand / supply numbers.

The demand for industrial land

Economic forecast

Demand

5.45 The forecast growth in industrial sector jobs is modest; only 1,000 jobs, which generates a demand for 83,000 sq m of floorspace or 20 ha.

Table 5.10 Swale – net demand for industrial floorspace 2016-2036

	Manufacturing & other Industrial	Warehousing	Total Industrial
Jobs change	-87	1,097	
Floorspace density factor (sq m/job)	41.5	73.5	
Factor for frictional vacancy (%)	7.5	7.5	
Floorspace (sq m)	**-3,869**	**86,697**	**82,828**

Source: job change - Experian September 2017, and PBA analysis

5.46 As with offices we provide a small additional allowance accounting for the committed (negative) pipeline of space (2.9ha), and also to increase vacancy rates from the current low (2.5%) to a 'healthy' 7.5%. These additions increase demand to approximately 34 ha of new land over the plan period.

Table 5.11 Swale demand for industrial floorspace/land 2016-2036

	DEMAND	Sq m GIA	Ha
a	Demand (net change) 2016-36	82,828	20.7
b	Allowance to replace future industrial losses from current planning permissions *[sites started and with extant planning permissions for other uses]*	11,562	2.9
c	Allowance to increase vacant stock to the frictional vacancy rate (7.5% of total stock) *[vacancy currently 2.5%, so 5% uplift to return to frictional vacancy rate of 7.5%]*	39,959	10.0
d	***Gross demand (a+b+c)***	***134,348***	***33.6***

Source: PBA analysis and KCC for planning pipeline data

Supply

5.47 Against the 34 ha of demand the Council has a very large pipeline of land (again as for offices the data is drawn from Kent County Council monitoring data, and a schedule is included at Appendix **Error! Reference source not found.**), as yet undeveloped - 36.5 ha of land has planning permission to be developed, and a further 71.5 ha of allocated land is awaiting development. This sums to 108.1 ha in total.

Table 5.12 Swale gross industrial supply

SUPPLY			
e	Existing surplus vacant stock (in excess of the 7.5% frictional vacancy rate) *[current vacancy 2.5%, so no surplus adjustment required]*	0	0.0
f	Industrial planning permissions yet to be implemented	146,119	36.5
g	Allocations for industrial (part or in full) yet to come forward	286,139	71.5
h	***Gross supply (e+f+g)***	***432,258***	***108.1***

Source: PBA analysis and KCC for planning pipeline/allocations data

Balance

5.48 As with offices we make provision for expected losses of land to be made up over the life of the plan. The County monitoring data shows that 2.34 ha industrial land was lost each year. As noted above this is heavily influenced by the loss of Sittingbourne Paper Mill and therefore assume that around 47 ha of land is needed to turn the net number above into a gross demand for new land. However, even with this adjustment this results in a large oversupply. The supply of land totals 108 ha and the demand only 34 ha.

Table 5.13 Economic forecast - industrial balance

FORECAST BALANCE - 2016-2036			
i	**Balance (d-h) (-ve = undersupply +ve = oversupply)**	**+297,910**	**+74.5**
j	**Allowance to replace anticipated future losses** (beyond 'b' above) *[based on 2008-16 annual average losses @ 2.34 ha pa (this excludes the 7% of new industrial land that was formerly in industrial use, applied to 2017 onwards]*		**46.8**
k	**Final Balance *(i+ j)* (-ve = undersupply +ve = oversupply)**		**+27.7**

Source: PBA analysis and KCC for planning pipeline data

5.49 One major caveat to this number is that the forecast is unlikely to capture the demand for strategic warehousing. In our market review we noted that Swale has attracted some larger warehouse demand but this is partly a product of the Borough offering land – whereas other districts have not. Strategic warehousing demand tends to follow supply and where land is provided warehouses follow. Because of this caveat we cannot conclude that the 27.7ha of land is genuinely surplus to demand but it may instead stimulate additional demand over and above the forecast.

Past Trends – excluding large warehouses

5.50 As noted above whether or not to include the large Morrisons take-up in a projection of past trends makes a large difference to the amount of land required.

5.51 So, we have developed two scenarios, one where we exclude this take-up from the projection, and a second where we include it.

5.52 For the 'excluding' large warehouse scenario we also exclude the 'Aldi' planning permission from the analysis – because this also relates to a strategic warehouse. We also exclude the large local plan allocation at Ridham & Kemsley (145,985 sq m

B1-B8 according to the KCC data). This is because this is likely to be attractive to and taken up by large warehousing occupiers, and is less like to meet local needs.

5.53 So, this scenario represents our best estimate of 'normal'' demand and supply free of strategic warehousing.

Demand

5.54 Setting aside large warehouse take-up demand for non-strategic industrial land is still positive, 9.8ha. Increases by 2.9ha to replace losses in the pipeline and a further 10ha because the industrial vacancy rate is only 2.5% whereas it ought to be around 7.5%.

Table 5.14 Industrial demand – excluding large warehouses (past trends)

	DEMAND	Sq m GIA	Ha
a	Demand (trend based) 2016-36	39,170	9.8
b	Allowance to replace future industrial losses from current planning permissions (sites started and with extant planning permissions for other uses)	11,562	2.9
c	Allowance to increase vacant stock to the frictional vacancy rate (7.5% of total stock) *[vacancy currently 2.5%, so 5% uplift to return to frictional vacancy rate of 7.5%]*	39,959	10.0
d	***Gross demand (a+b+c)***	***90,691***	***22.7***

Source: PBA analysis and KCC for planning pipeline data

Balance

5.55 There are 59 ha of new land in the supply, which is 36 ha more than the demand figure. But we also need to make an allowance to replace future losses, which turns the balance negative and means approximately 10 ha of land is required.

Table 5.15 Industrial supply -excluding large warehouses

	SUPPLY		
e	Existing surplus vacant stock (in excess of the 7.5% frictional vacancy rate) *[current vacancy 2.5%, so no surplus adjustment required]*	0	0.0
f	Industrial planning permissions yet to be implemented	89,047	22.3
g	Allocations for industrial (part or in full) yet to come forward	145,985	36.5
h	***Gross supply (e+f+g)***	***235,032***	***58.8***
	FORECAST BALANCE - 2016-2036		
i	**Balance (d-h) (-ve = undersupply +ve = oversupply)**	**+144,341**	**+36.1**
j	**Allowance to replace anticipated future losses** (beyond 'b' above) *[based on 2008-16 annual average losses @ 2.34 ha pa (this excludes the 7% of new industrial land that was formerly in industrial use, applied to 2017 onwards]*		**46.8**
k	**Final Balance *(i+ j)*** **(-ve = undersupply +ve = oversupply)**		**-10.7**

Source: PBA analysis and KCC for planning pipeline data

Past Trends – including large warehouses

5.56 As an alternative past trends scenario we have included the large Morrison's distribution unit (on the demand side), and we also include the recent 'Aldi' planning permission and the large allocation at Ridham & Kemsley.

Demand

5.57 By including the Morrisons take-up demand (line 'a') increases from a small positive (Table 5.14 above circa 10 ha) to 63 ha. This is because, following the logic of a past trends approach, this single large take-up repeats several times over the plan period.

Table 5.16 Industrial demand with large warehouses (past trends)

	DEMAND	Sq m GIA	Ha
a	Demand (trend based) 2016-36	253,070	63.3
b	Allowance to replace future industrial losses from current planning permissions [sites started and with extant planning permissions for other uses]	11,562	2.9
c	Allowance to increase vacant stock to the frictional vacancy rate (7.5% of total stock) *[vacancy currently 2.5%, so 5% uplift to return to frictional vacancy rate of 7.5%]*	39,959	10.0
d	***Gross demand (a+b+c)***	***304,591***	***76.1***

Balance

5.58 In the table below we have updated the balance and we have also included the recent 'Aldi' planning permission in the supply (line 'f'). This increases the supply of land with planning permission by around 14ha. We also include the large allocation at Ridham & Kemsley (line 'g') because this is likely to meet the needs of large warehouse occupiers and not the local market.

5.59 These adjustments roughly balance each other; the inclusion of the new supply broadly balances with the increased demand. In this scenario the undersupply increases by only 4ha.

Table 5.17 Industrial land with large warehouses – balance

	SUPPLY		
e	Existing surplus vacant stock (in excess of the 7.5% frictional vacancy rate) *[current vacancy 2.5%, so no surplus adjustment required]*	0	0.0
f	Industrial planning permissions yet to be implemented	146,119	36.5
g	Allocations for industrial (part or in full) yet to come forward	286,139	71.5
h	***Gross supply (e+f+g)***	***432,258***	***108.1***
	FORECAST BALANCE - 2016-2036		
i	**Balance (d-h) (-ve = undersupply +ve = oversupply)**	**+127,667**	**+31.9**
j	**Allowance to replace anticipated future losses** (beyond 'b' above) *[based on 2008-16 annual average losses @ 2.34 ha pa (this excludes the 7% of new industrial land that was formerly in industrial use, applied to 2017 onwards]*		**46.8**
k	**Final Balance *(i+ j)* (-ve = undersupply +ve = oversupply)**		**-14.9**

Source: PBA analysis and KCC for planning pipeline data

Margin for Industrial Land

5.60 When we discussed the office pipeline above we concluded that it did not need an additional margin. That was because, by using a 40% plot ratio, there was already considerable 'headroom' to provide more office space on the quantum of land identified. But this does not apply to industrial land.

5.61 This is because for industrial property the non-built land, used for yardage or circulation space, is of equal economic importance to the functioning of the land. The efficient operation of a warehouse, or industrial unit is dependent on the efficient flow of goods and services into the site. It is also the case that the operational hours of many industrial units mean that they cannot rely on public transport, and so require more on-site parking than maybe the case for an urban office site. So there is much less 'slack' in the land supply we recommend above.

5.62 To address this limitation, we provide an extra margin of land, compared to the needs identified above. We add a further 5 years of demand (row 'a', where positive), and 5 years of replacement space / land (row 'j').

5.63 This means that for both scenarios a further 10 ha is needed to replace losses (j) and for the 'with warehousing' scenario a further 16 ha because in this scenario demand is positive. So 26 ha in total, five more years of losses and five years' additional demand.

5.64 This increase comes with an important caveat; this is a long term need and does not necessarily need to be provided imminently if the sites cannot be identified at this time. But the Council still needs to start considering where the next round of large sites will come from because they will generate significant infrastructure needs with the associated long lead in times.

Industrial Summary

5.65 The economic forecast shows an oversupply of 27.7 ha of land. But this is highly likely to exclude footloose warehouse demand that could be attracted to the Borough simply by the availability of land or sites. Without this footloose demand job growth is low and so floorspace growth also low.

5.66 Looking at the past take-up scenario, excluding warehousing, we show a small positive need of around 10 ha which increases to 20 ha once a 'margin' is added.

5.67 For the warehousing scenario need increases from 15 ha to 41 ha when we add in a margin. As noted above this 'margin' does not necessarily need to be provided today because the logic of the margin is that it may only be needed towards the end of the plan period. But given we know that for industrial land take-up is not uniform and a large quantum of land could be taken by only a small number of large units it may be prudent to at least seek this higher quantum of land as early as possible.

5.68 Unlike offices, where the forecast and past take-up approaches broad agree (10-15 ha) the industrial numbers don't agree. Past take-up is stronger than the forecast approach and allowing for a margin the 'with strategic warehousing' scenario requires around 40 ha of additional land.

5.69 Our recommendation would be that Swale looks to accommodate the 40 ha of new land – mostly on sites capable for accommodating large unit demand reflecting the driver of this higher demand scenario. But should sites not be available then the evidence suggests less land is needed to meet local needs. 20ha would be sufficient to meet more local needs using the past trends approach (excluding warehousing).

The Science Park

5.70 Above we have considered the need for additional office and industrial land. Here we consider future demand for land at the Science Park.

5.71 In theory the analysis above should have captured demand for additional land within the Science Park. This is because the job forecasts estimate the demand for all jobs across all sectors in Swale. The forecasts are built knowing the Science Park exists and knowing how it has grown in the past.

5.72 The Kent Country Council monitoring data used to inform the past trends includes all development in the Borough; on and off the Science Park. We also know that the Science Park has displaced some local demand.

5.73 So in simple terms any additional land promoted at the Park needs to be seen within the numbers outlined above. If it were counted against the land identified above, it is highly unlikely that the large scale new allocation at the science park could be justified. The Borough wide demand, spread around all centres, for offices is at most 15 ha over the plan period and 'local' industrial 20ha.

5.74 However, under an aspirational scenario, where the Council seeks to break from trend, then the land supply cannot be constrained to our analysis above. But in this eventuality the aspiration for a 1:1 homes to jobs ratio is very unlikely to be sound. This is because we know that the full delivery of the current plan results in the 15/20ha additional need we have noted above. So, while the next plan is seeking additional homes over and above this the additional employment need generated from the housing uplift is likely to be modest. The main technical reason for this is that while CLG have increased the dwelling targets the population projections remain unchanged. The need for jobs (and labour supply) is dependent on the population and not the number of homes.

The demand for non-B space employment

5.75 Our core objective is to advise on the need for 'employment space' as normally defined in the Use Class Order 'B' grouping. But the B class economy is only part of the wider Swale job market; and in parts of the Borough the traditional B class groups are not a significant driver of employment. So in this section we briefly consider the growth prospects of the non B class employment sectors; drawing on the Experian forecast. It should however be noted that many non B class sectors are planned for in different way, and using different methods.

5.76 The data shows that the main growth sectors, outside the B classes, are those associated with servicing the growing residential population and, especially, an ageing population. Residential care and social work is the fastest growing non B class sector in the economy, although education also shows strong growth.

5.77 This reflects the general ageing of the national population, but also for education, the reasonably balanced profile of migration into Swale. Unlike many other coastal communities, migration into Swale is not entirely dominated by older age retirement moves.

5.78 In the figure below we have highlighted the key 'non B class' sectors.

Table 5.18 Job growth, all sectors

All workforce jobs by category	2016	2036	Total
Professional services	3,500	5,100	1,600
Residential Care & Social Work	3,800	5,400	1,600
Administrative & Supportive Service Acti	4,600	6,100	1,500
Education	5,500	6,900	1,400
Land Transport, Storage & Post	5,800	7,200	1,400
Specialised Construction Activities	3,200	4,500	1,300
Accommodation & Food Services	3,600	4,200	600
Real Estate	900	1,500	600
Computing & Information Services	800	1,300	500
Construction of Buildings	1,600	2,100	500
Health	1,700	2,100	400
Agriculture Forestry & Fishing	1,600	1,900	300
Finance	600	900	300
Civil Engineering	400	500	100
Other Private Services	1,300	1,400	100
Retail	5,300	5,400	100
Utilities	900	1,000	100
Public Administration & Defence	2,500	2,400	-100
Wood & Paper	600	400	-200
Food, Drink & Tobacco	1,100	800	-300
Metal products	1,100	800	-300
Other Manufacturing	1,500	1,200	-300
Wholesale	3,300	3,000	-300
Rubber, Plastic and Other Non-Metallic	1,300	900	-400
Air & Water Transport			
Chemicals	100	100	
Computer & Electronic Products	200	200	
Extraction & Mining			
Fuel Refining			
Insurance & Pensions			
Machinery & Equipment	400	400	
Media Activities			
Pharmaceuticals	400	400	
Printing and Reproduction of Recorded Media			
Recreation	1,200	1,200	
Telecoms			
Textiles & Clothing			
TOTALS	**58,800**	**69,300**	**10,500**

The Visitor Economy

5.79 What is very difficult to spot from the data above is evidence of the visitor economy in Swale. This is partly because the sector is difficult to place in the Standard Industrial Classification and many visitor related jobs overlap with the non-visitor economy.

5.80 Research undertaken for the County Council, in 2015[20,] used visitor expenditure to estimate the number of jobs in the economy. Their estimate was that the visitor economy employed 2,789 FTE jobs or 4,024 'actual jobs' in the Borough.

Figure 5.1 Visitor Employment

Direct employment

Full time equivalent (FTE)							
	Staying Visitor		Day Visitor		Total		
Accommodation		335	31%	17	1%	352	13%
Retailing		97	9%	668	39%	765	27%
Catering		193	18%	765	45%	958	34%
Entertainment		76	7%	176	10%	252	9%
Transport		56	5%	79	5%	135	5%
Non-trip spend		328	30%	0	0%	328	12%
Total FTE	**2015**	**1,085**		**1,704**		**2,789**	
Comparison	2013	1,014		1,777		2,791	
Difference		7%		-4%		0%	

Estimated actual jobs							
	Staying Visitor		Day Visitor		Total		
Accommodation		496	33%	25	1%	521	13%
Retailing		146	10%	1,001	40%	1,147	29%
Catering		289	19%	1,148	45%	1,437	36%
Entertainment		107	7%	248	10%	355	9%
Transport		79	5%	111	4%	190	5%
Non-trip spend		373	25%	0	0%	373	9%
Total Actual	**2015**	**1,491**		**2,533**		**4,024**	
Comparison	2013	1,427		2,642		4,069	
Difference		4%		-4%		-1%	

Source: Economic Impact of Tourism – Swale 2015

5.81 The Kent work does not look at the growth potential of these sectors; instead they only report the baseline data. But looking at the forecast data, growth in the key visitor sectors is reasonably weak. The Experian sector "accommodation and food services" is the best proxy for the visitor sector as a whole, and this is forecast to grow by only 600 jobs over 20 years. The retail sector employment declines – although this may not be typical for visitor related retail, which is less likely to be influenced by e-retailing– a phenomenon, which is decimating employment in traditional retail formats.

5.82 One main challenge facing the visitor sector going forward is that it is generally accepted (by the Visitor Hospitality industry itself) to be a low wage sector[21;]with 25% of the workforce on the pre-2015 Minimum Wage, and many others below the then proposed new National Living Wage. Given the tight labour market competition for workers will only tighten making job growth even harder. The same challenge will face other sectors in the economy where wages are generally low (e.g. social care).

5.83 In our work we cannot advise that wages ought to be higher, or that job growth in other sectors should be constrained to leave workers available for other sectors. We

[20] http://www.visitkentbusiness.co.uk/library/Economic_Impact_of_Tourism_-_Swale_2015_FINAL_REPORT.PDF Sourced from the Cambridge Model 2015.

[21] http://www.bha.org.uk/bha_news/we-require-a-constructive-dialogue-with-george-osborne/

can only note that when developing sector based strategies the Council needs to consider the cumulative impacts across the whole economy; strategies based simply on unsuitable job growth targets are unlikely to be realised.

The agricultural economy

5.84 Swale is well known for its agricultural economy and especially soft fruits. This type of activity does not generally demand employment land, most agricultural land and property is outside normal planning control. Where agricultural related industries demand employment sites, for example warehousing or distribution of agricultural goods, then this activity is picked up in both the economic forecast and also our analysis of past trends.

5.85 However, as with the B class uses, the agricultural industry employs people from the Boroughs limited supply of labour.

5.86 As noted from the table 5.13 above, Experian, using data from the Office for National Statistics (BRES) shows that there are 1,600 jobs in Agriculture. But more detailed data collected by the Department for Environment, Food and Rural Affairs (DEFRA) (from a different source) shows a higher number of jobs but also that the majority of the jobs are part time or casual jobs.

5.87 This alternative data shows that in 2016 there were 248 'holdings' employing 2,500 agricultural workers in Swale. But the vast majority of these workers were casual staff (1,550) or part time workers (361). Full time employment (including self-employed) was less than 600 workers in 2016.

5.88 There is no further detail available about this casual labour – so we don't know how many of these casual workers are residents of Swale versus temporary migrant labour.

5.89 Some data sources count the number of new national insurance numbers and the associated country of origin[22]. There were 1,700 new NI numbers issued to migrants in Swale (2015/16) with most being given to EU Accession nationals. Given this strong flow it is likely that many of these migrants are working in the agricultural sector. But drawing firm conclusions on the limited data is risky.

5.90 It is not for this work to comment on national policy decisions. But what the data shows is that the Borough's agricultural economy is vulnerable to changing national policy. Permanent Swale residents generally have access to full time, year-round employment in the Borough or nearby and as with the visitor economy lower paid, causal employment opportunities, may be difficult to fill in the future. Given the very uncertain nature of the UKs departure from the EU it would be risky to speculate to what extent (or not) the industry is at risk because the supply of migrated labour may be constrained going forward. Messages from Government in this regard as at best mixed – with some sources saying that future national policy will protect agricultural industries from any negative effect while others suggest future policy will constrain migration flows.

[22] https://www.kent.gov.uk/__data/assets/pdf_file/0009/48555/Migrant-workers-in-Kent.pdf

Conclusions

Offices – 15 ha of new land

5.91 For offices we have identified a small demand for new land. Dependent on scenario an additional 36,000 - 60,000 square metres of additional floorspace is needed. Assuming a low plot ratio of 40% this needs, at most 15 ha of land (minimum 9 ha).

5.92 We suggest working to the higher number, developed from past trends, but not providing any additional allowance (i.e. additional margin) over this number. This is because there is ample 'headroom' in the plot ratio we have adopted for higher density development to come forward should the market be strong enough to deliver.

Industrial and warehouses – 41ha of new land

5.93 Nether scenario we have considered expects significant growth in 'local' industrial and warehousing uses. But new land is still needed to replace sites that may, based on past trends, be lost from the supply and need replacing to maintain the 'nil net change' in floorspace.

5.94 However, in the recent past, the bulk of the space that has been taken up in the Borough relates to large unit demand – strategic warehousing. In the trend period used in this work we have two new units; the Morrison's warehouse and Aldi (permitted/under-construction). Applying this scenario there is a requirement of 15 ha to simply accommodate growth, but a further 26 ha to provide additional 'margin'. This 41 ha number is caveated in that that the current planned supply is sufficient to last into the medium term, and it is only towards the end of the 20-year plan period that the current supply is exhausted and the additional 26 ha is required. So, while it is preferable to identify this now in order to offer a wider choice to the market, the land sought in the next plan does not necessarily need to be deliverable in the short or even medium term. This is an important consideration where new sites may become available for development following transport investment in the mid plan period and where newly accessible sites or areas of search are preferable to those which can be delivered on the short term.

5.95 Whatever new land is identified needs to be attractive to strategic warehouse sectors.

The Science Park

5.96 In our work we are cautious about the Science Park. We note that total job growth in the economic forecast is only 10,500 net additional jobs over the plan period and that it is unrealistic to assume delivery of 11,000 new 'science park' jobs in Swale.

5.97 However; should the Council consider taking the site forward there is scope and technical merit to consider that any new employment land could form part of the 'normal' land supply and meet 'normal' need; with a Science Park core.

5.98 A similar approach has been adopted at one of the UKs most successful 'hybrid' sites at Milton Park, and should the proposal succeed, especially with regards to opening up a new junction, the location of the site is likely to be attractive (although we note any similar located proposal would also have this benefit).

5.99 Such a hybrid site would, in our opinion make the best use of the Science Park opportunity. It would facilitate supporting the science park cluster in Swale and allow it to grow in line with market demand for these specialised uses. But, it would also provide a supporting mix of property to allow the site to achieve critical mass (where it can support a wider range of services on site and high quality public transport).

5.100 It would also facilitate grow-on space, a range of less specialised property in the same location.

5.101 Above we identified that there is need for an additional 15 ha of new office land and there is no reason why a significant share of this cannot be accommodated at the Science Park; indeed offering the additional office space at the Science Park, could be advantageous to build additional critical mass in this location and the allocation of the land for open B1 uses could facilitate either normal office demand or, should the Science Park proposals attract new investment the B1 allocation could accommodate B1(b) to match demand. We have also suggested above that transport improvements, most likely related to KSP the new junction and associated linking infrastructure, could open a new portfolio of high quality land to meet industrial demand over the next plan period which again could only assist with developing a critical mass.

5.102 In conclusion, whilst the significant infrastructure issues regarding this site are outside the remit of the employment land evidence, it is clear that addressing the transport constraints would have wider strategic benefits for the Borough, including opening up employment site opportunities in the future. We cannot weigh up what could be considerable costs to deliver this land, verses an alternative; this may weigh against expansion this site – regardless of its Science Park status.

The Science Park as a high growth scenario?

5.103 One possible route available to the Council is that, should the Science Park be supported, then land is allocated in addition to the any ‘business as usual’ need.

5.104 Until recently national policy was drafted in such a way as to discourage Councils from over-allocating land or adopting very aspirational scenarios. This is because a too high economic target can be misinterpreted to inflate housing numbers.

5.105 But policy has shifted and economic and housing needs are now disconnected in the new Guidance.

5.106 The downside to this is that over-allocation could only really be justified where there is evidence that the land identified will meet a different market – in this case a distinct Science Park demand, but we don’t consider the current suggestion of 11,000 new jobs credible to attribute to this sector.

Conclusion

5.107 In this chapter we have considered the demand for new industrial and office land in the Borough.

5.108 We have found that there is a need for an additional 15 ha of new land for offices. We have also considered where the expansion of KSP sits in this assessment. Drawing on our market analysis and that discussed above, we consider that in the main, the proposed expansion of the KSP should be viewed largely within our demand analysis outlined above. Should it proceed, then the majority of the land and property would be competing with the general employment land supply in the Borough.

5.109 However, this finding, that the KSP proposal needs to be viewed in the context of the wider Borough demand and supply of employment floorspace, should not be used to dismiss the proposal.

5.110 Coupled with a new motorway junction the site would be attractive to the market for a range of employment uses including warehousing, industrial and some offices. It would also nurture the existing KSP science park 'seed' - although our opinion remains scope to grow 'pure' science park actives on the site is limited.

5.111 It is however the case that without a shift in accessibility it is very unlikely any significant aspiration to grow KSP, as a science park cluster, could ever be fulfilled – even on a modest scale.

5.112 We have also found a need for 41 ha of new industrial land, although this is largely justified to meet large unit demand and most of this (26 ha) is the product of the 'margin'. And so, when looking for sites it is not essential that this can be delivered in the short term.

6 CONCLUSIONS AND RECOMMENDATIONS

Introduction

6.1 The planning system is currently in a state of flux. Government has recently published a new National Planning Policy Framework (NPPF 2018), but for economic land uses there is little between the NPPF 2012 and this new version. What is missing at the moment is a new suite of supporting guidance (PPG). In the absence of that, and the limited changes in the NPPF, common sense would suggest that the Council continues to plan for economic needs in line with the old PPG and established practice.

The Swale Economy

6.2 The Swale resident economy is successful in that almost all residents have access to a job within the Borough or nearby. Resident earnings are also on a par with neighbours. For future growth the labour market in Swale is ‘tight’ with little spare capacity to accommodate job growth that cannot be supported by associated housing growth.

6.3 As with all local economies there is some commuting cross boundary, but this tends to be short distance into adjacent Council areas. It may be tempting to seek to ‘recall’ commuters by providing them with jobs within the Borough, but this is a high risk strategy and one that raises significant Duty to Co-operate issues. So is not a policy approach we would recommend as the basis for future planning in Swale.

6.4 Looking at the workplace economy this has experienced strong growth in recent years. The office economy, in terms of jobs and floorspace has outperformed the County, but remains smaller than many neighbouring authorities. The data suggests that much of this office employment change has been ‘spaceless’ – in that firms have made more efficient use of their existing stock of space, as opposed to taking new.

6.5 For industrial sectors, when manufacturing and warehousing are considered together the sector has declined in terms of jobs – although only by 1,000 jobs (just 5% of all industrial jobs) over the 16-year period. The stock of industrial floorspace has grown steadily over the period since the financial crisis, and this is most likely to be a product of a shift from manufacturing towards warehousing and logistics that utilise lower space to employee densities. Swale has successfully attracted a small number of very large distribution sheds in the last few years – attracted to Swale by the availability of cost efficient land within reach of London.

The Port

6.6 The Port has added space to its portfolio in recent years and agents report that there is unmet demand for new port related uses. But for the Council, and the next development plan, the port land is outside of normal planning controls. Given land within the port is outside of control it is very difficult to estimate how much land outside the port may be needed. There is, and will continue to be, land allocated for ‘general’ employment nearby which could absorb additional demand as it emerges. But in summary the future of this part of the economy is dependent on continued close working between the port operator and the Council.

Kent Science Park

6.7 Swale benefits from the Kent Science Park at Sittingbourne. But this is, at the moment, a highly constrained site and unable to grow.

6.8 There are active proposals being promoted by the owners to address these constraints. This includes a new junction of the M2 and new local access, supported by a very significant urban extension (or new community).

6.9 For our report this is a very challenging opportunity to assess. We do not wish to dismiss the Councils, or the site owners, aspirations to grow the Science Park. But Science Parks tend to be reasonably small in size, employing only a couple of thousand people. For growing the Science Park, we note that there is a fiercely competitive market in Kent and wider afield – all seeking science/technology/knowledge based growth.

6.10 Although we strike a cautious note our opinion is that with a new strategic access the broad location of the Science Park would be market attractive for new commercial uses. Most obviously warehouses would best benefit from the new access but also general industrial and possibly 'normal' offices. There is evidence that some of the recent growth at KSP is 'normal' demand which has been attracted to the KSP site at the expense of other property in Swale.

6.11 As part of this growth it is reasonable to see a science related 'core'; supported by a larger and more mixed 'normal' employment site.

6.12 For the Council, in making future choices for growth, it will be important to consider the wider strategic transport benefits that addressing the transport infrastructure constraint could deliver, and the possibility of opening up longer term development opportunities. A new M2 – A2 link road would benefit more than just the land being promoted for new development. Other established estates, including Eurolink, would also benefit.

6.13 The scale of new jobs being promoted in this one area (>10,000) would absorb most, if not all, Swales demand for new employment space over the plan period and may require a shift in commuting to fill all jobs envisaged.

Future Demand (new land needed)

6.14 In this study we have considered the amount of new land needed to meet business needs. To do so we have applied the (old) Planning Policy Guidance because, as noted in the report, we don't yet have new guidance.

6.15 The PPG supports two approaches to estimating future needs. One using economic forecasts and a second projecting forward past trends. Here the first method results in a very low demand for new land but we don't think this captures the potential from larger warehouses in Swale. As we discuss, job based forecasts struggle to address warehouse demand because this type of demand generally follows land supply. Where land has been provided, or is provided in future plans, then logistics occupiers are often attracted to take this land up.

6.16 In Swale there have been two recent large new warehouses built – one for Morrisons and another more recently for Aldi. Knowing this we recommend Swale provides new land using the Past Take-up approach which includes this warehouse take-up.

6.17 This method, using take-up data from Kent County Council, generates a demand for 76.1ha of new industrial land 'gross'. This is in excess of the land allocated for development in the current plan (108ha). But once an allowance is made to project forward past losses (45.8ha) and an additional 'margin' (5 years – 26ha) the shortfall increases to around 40 ha of land.

6.18 For offices we calculate a small undersupply of land should no more land be allocated. Dependent on which scenario this is between 9ha-15ha with the lower number based on the economic forecast and the higher on past take-up.

6.19 So, in summary we have identified a need for around 40ha of new land for industrial and warehousing uses. The need for new office land is much less with 15ha being the maximum our analysis supports.

6.20 When considering how and when to meet this need we note that there is no short (or medium) term shortage of land. 26ha of the 40ha industrial land recommendation is a product of applying a 5-year 'margin'. This margin provides for market choice and flexibility over the whole plan and beyond. For both offices and industrial uses a large share of the new land needed is to replace 'windfall' losses from the supply. Should policy successfully defend sites from being lost then the need to allocate new is much reduced.

6.21 In both cases, managing the 'margin' and providing contingency for continued losses could also be managed via regular plan reviews.

6.22 Regarding the quality or mix of property to be promoted the Market Chapter of the report provides specific guidance by location. In summary the bulk of the industrial land needs to be market attractive for larger warehouse units – because that type of take up 'fuelled' the Past Take-up method which arrives at the 40ha recommendation. This strongly suggests that this 40ha 'industrial' demand needs to be satisfied in the west of the Borough, around Sittingbourne or the Isle of Sheppey. This could potentially include land related to the Science Park proposals.

6.23 For non-strategic industrial demand there is a supply of land in the existing plan which we think more than satisfies demand. This includes undeveloped allocations at both Sittingbourne (including further phases of Eurolink) and Perry Court (Faversham)

6.24 However, we note that the (up to) 15ha of new office provision overlaps with the non-strategic industrial demand – the two sources of demand are looking for similar sites. In Swale the office demand is not for traditional town centre (B1a) office buildings, nor for large purpose built office parks. But instead flexible 'courtyard' type developments in both Sittingbourne and Faversham. The two recent developments in Faversham have both taken this form (the Foundry and Eurocentre).

6.25 This suggests that the additional 15ha of land needed ought to take a similar form with a bias towards Faversham because that part of the Borough is less likely to attract larger warehouse demand. Also, as noted in the report, there is scope for Faversham to compete with Canterbury by providing a quality supply. It may also be possible that there could be some small scale warehouse demand to cater for last mile delivery to service the growing population in Faversham and possibly Canterbury.

6.26 Perhaps the deciding factor in allocating new land ought to be a commitment to offer the land freehold. In our market chapter, we noted strong and viable demand for freehold property. But this is not normally offered by the market. Sites offering freehold ought to be prioritised for allocation in the next plan.

6.27 Finally; we don't provide a quantitative target for new rural sites. This is because there is little evidence on which to base any target and most rural requirements arise because established rural firms generate a need linked to their specific business cycle and their micro location. However, should small scale sites (<0.25ha) be promoted to the Council, especially those with a known local operator in mind they should be viewed positively and outside of our quantified targets.

6.28 When reviewing the plan policies, the Council may wish to consider a 'rural' exception policy noting that the new (2018) NPPF makes provision for housing in rural areas (Paragraph 72) outside of the normal land allocation process.

To meet future business needs this report recommends that:

A) Up to 40ha of new land for industrial uses is allocated. This should be in the West of the Borough (Sittingbourne, Isle of Sheppey) on sites that are market attractive for larger warehouses.

B) Up to 15 of new land for offices and light industrial uses is allocated. This should be focused to the east of the Borough in or around Faversham on one or more sites.

C) No quantitative requirement is given for rural employment outside the main settlements (Sittingbourne, Faversham and the settlement on the Isle of Sheppey). But in line with national policy 'rural' proposals should be treated on their merits and sites should not be discounted because they may appear less sustainable than alternatives in the main towns (NPPF 2018, paragraph 84).

Existing Sites

6.29 As part of our work we have assessed the current stock of employment land and property in Swale. The assessment criteria and scoring schedule and the site by site analysis are found at Appendices A and F.

6.30 In general, we find that the sites remain attractive for ongoing employment use. For industrial property, this is best evidenced by the very low level of vacancy in the market. While the vacancy rate is so low there is no rationale to proactively release property – even with a 'paper' pipeline of new supply.

6.31 For office demand vacancy rates are higher, but not so high to suggest that there is an oversupply of property which needs to be addressed by proactively releasing sites from the stock.

Public sector intervention

6.32 The Public Sector has a role to play in bringing forward the new portfolio of land and property in the Borough. However, in practice Council's powers to intervene in the market are limited and continued austerity means that it is challenging for the Borough to invest its own resources.

6.33 The Council has recently published a new Economic Development Framework (Swale Regeneration Framework 2018). This is not a planning evidence base document; it does not directly inform the new plan and works to a much shorter timetable. However, our report and its findings broadly align with the strategy.

6.34 The quantitative recommendation to identify new industrial land echoes the Framework's "growth highlights" by providing more land for distribution activities or manufacturing. It also facilities further expansion of Swale's 'Industrial Hub' – either as part of the 40ha of new land or on the existing allocated land we carry forward into the new plan. The Framework recognises that the Swale skills base may be weaker than some neighbours (as noted in our review of the economy) and seeks to address that weakness.

6.35 The Framework also notes the need for a significant infrastructure upgrade to facilitate future growth. In our view this is the key objective driving public intervention. Investing in the transport network makes Swale a more attractive location for firms to move to and developers to promote (without public subsidy) commercial property.

6.36 For Sittingbourne; as part of our consultations, we have repeatedly been told that the western side of the Borough is a good location for growth partly because it is a cost efficient location to buy and develop land. But, also because firms can still access markets outside of Swale. A robust transport network has been vital to securing a new generation of warehouses in Swale.

6.37 But this transport network is reaching capacity with access onto the M2 acting as strategic 'pinch point' at Sittingbourne. Improvements are planned at Junction 5 which may relieve the junction and benefit both Sittingbourne sites and also those on the Isle. However, this will not automatically address the local network and the lack of any 'orbital' route around the town that avoids the town centre. Consultees noted that Eurolink is a market attractive site but is effectively a 'cul de sac' and any new development will be 'at the back of queue of existing traffic' trying to exit the estate.

6.38 In the longer term a new M2 junction and southern link road may be part of the solution. This will certainly open up the Science Park which cannot be expanded without major investment in the local network. But we also note that should this be developed then it opens a large amount of market attractive land for commercial development which is highly likely to attract additional logistics demand.

6.39 Faversham does not, as yet, suffer the same transport and connectivity problems. It is also the case that commercial development here tends to be smaller scale, meeting local needs, and less dependent on the strategic network. However, there are concerns that the network here will struggle to absorb demand for housing and commercial growth without some improvements to the local junctions – with accessibility to Canterbury being important given we think that Faversham could attract more demand for commercial property from Canterbury should additional land be allocated in the town.

Policy Recommendations

6.40 As part of our conclusions we suggest some improvements to the adopted plan policies.

6.41 Our starting point in doing this is that the adopted plan is sound. Having recently being examined there is no question that the policies are not legally compliant or incapable of being implemented. Although we have a new NPPF, as noted above, there is little change in how Councils plan for employment land and (as yet) no new Planning Policy Guidance.

6.42 However, in our opinion, the drafting of the policies could be improved to make them more effective and clearer.

6.43 Firstly, we would suggest that policy CP 1 is too long and too comprehensive; mixing general policy statements with detailed development management policy. While, in general being too long, we consider insufficient detail is given to how the development management polices need to operate in practice.

6.44 We would suggest that in the next plan this policy is 'broken down' and does not seek to address all economic needs in one policy. Retail, education and leisure uses don't sit well within a policy which also seeks to plan for the B class uses (and associated SG uses). This is because the 'B class' and other associated employment uses (inc. SG uses) tend to be quantified and controlled in different ways to the non B class economy.

6.45 As a structure the Council may want to consider a suite of three strategic polices to manage the B class (and associated SG) and separate policies to manage other economic land uses.

6.46 The first of these policies should 'set the scene'; outlining that the Council will support the local economy by protecting the existing stock of property, where it has a reasonable prospect of being used for ongoing use, and allocating new sites to meet economic needs. This policy should also address the strategic objective to promote port related activities in and around the dock estate (recognising the dock is outside of the scope of normal planning control) and the Science Park (dependent on how constraints can be resolved).

6.47 The second policy should outline how the Council will manage the stock of property and provide development management guidance including setting out what is expected of applications where they promote a loss of employment floor space or undeveloped land within the Strategic Sites. We would suggest that the stock of existing land is 'allocated' on the proposal map.

6.48 To control losses most new plans include some form of 'loss' policy which requires applicants to demonstrate that they have tried to market a site before concluding it should be lost. Such a criterion is in line with the NPPF 'reasonable prospects' test and seeking some marketing evidence as part of this process is proportionate. A suggested policy approach is outlined in Appendix G. The Council may consider some of the text more appropriate for supporting text as opposed to policy however in this report we present the text as a single policy for simplicity.

6.49 A third policy should outline the quantum of new land allocated and that carried into the new plan and provide guidance as to the type of employment expected on each allocated site – balancing this detail with that needed in the site specific policies. This quantum should match the amount we have identified is needed to meet the 'Industrial with large warehousing' scenario (108ha of land carried forward plus around 40ha new) and the same approach for offices. For offices we note that policy should not restrict this land only to office provision but promote a ‘flexible’ supply which responds to the market.

6.50 Finally – we note that a new ‘rural exceptions’ policy could be justified to allow small scale rural development which arises outside the normal plan allocation route. This recognises that rural businesses cannot always foresee their future property needs and make applications for allocations in development plan reviews. The NPPF (2018) makes provision for exception housing sites and the logic could be extended to small scale (<0.25ha) employment sites. Such a policy could also assist those sectors outside the traditional employment uses but are important to the rural parts of Swale – including the tourist and leisure economy. There is no template for such a policy – the NPPF 2018 policy is new and as yet untested. So the Council will need to see how this new housing clause is used (or abused) in practice before scoping the policy.

APPENDIX A EMPLOYMENT SECTOR TO LAND USE MAPPING

1. Economic statistics and forecasts tell us nothing directly about employment space, because they do not classify jobs according to the type of space they occupy. Rather, the statistics split jobs into economic sectors (industries and services), according to the Standard Industrial Classification (SIC). To estimate how many jobs will be based in offices and industrial space, and how many in 'non-B' spaces such as retail premises, schools and hospitals, we need to translate sectors into land uses.
2. As the starting point for this translation we recommend a method developed by Roger Tym & Partners (now PBA) over a series of employment land reviews and tested in a large-scale study of the Yorkshire and Humber region in 2010[23]. To our knowledge there is no other published empirical research on the relationship between activity sectors and land uses.
3. The tables below show the sectors that are classified to industrial space and offices respectively. The names and numbers that identify each activity sector are from the UK Standard Classification of Economic Activities 2007 (SIC 2007)[24].

[23] Roger Tym & Partners with King Sturge for Yorkshire Forward, Planning for Employment Land: Translating Jobs into Land, March 2010

[24] http://www.businessballs.com/freespecialresources/SIC-2007-explanation.pdf

A.1 Table A1 Industrial sectors

Manufacturing		
Manufacturing and repairs	10-33	All manufacturing
	95.00	Repair of computers and personal and household goods
Other industrial		
Construction	43.2	Electrical, plumbing and other construction installation activities
	43.3	Building completion and finishing
	43.9	Other specialised construction activities not elsewhere specified (nec)
Motor vehicle activities	45.2	Maintenance and repair of motor vehicles
	45.4	Sale, maintenance and repair of motor cycles and related parts and accessories
Sewage and refuse disposal	37	Sewage
	38	Waste collection, treatment and disposal activities
Employment activities (part)	78	
Warehousing		
Wholesale trade except of motor vehicles and motorcycles	46	
Freight transport by road	49.41	
Removal services	49.42	
Storage and warehousing	52.10	
Other supporting land transport activities	52.21	
Cargo handling	52.24	
Post and courier activities	53.00	
Packaging activities	82.92	
Employment activities (part)	78	

Note

SIC 78, Employment Activities, covers workers employed through agencies in all activity sectors. They should be redistributed across the whole economy, both to B-class sectors and other sectors, in proportion to each sector's share of total employment.

A.2 Table A2 Office sectors

Office sectors		
Publishing	58	Motion picture production activities
Motion picture, video and TV programme activities	59.11	Motion picture, video and TV programme production activities
	59.12	Motion picture, video and TV programme post-production activities
	59.13	Motion picture, video and TV programme distribution activities
	59.20	Sound recording and music publishing activities
Programming and broadcasting activities	60	
Computer programming, consultancy and related activities	62	
Information service activities	63	
Financial service activities except insurance and pension funding	64	
Insurance, reinsurance and pension funding except compulsory social security	65	
Activities auxiliary to financial services and insurance activities	66	
Real estate activities	68	
Legal and accounting activities	69	
Activities of head offices, management consultancy activities	70.	
Architectural and engineering activities, technical testing and analysis	71	
Scientific research and development	72	
Advertising and market research	73	
Other professional, scientific and technical activities	74	
Renting and leasing activities	77.40	Leasing of intellectual property and similar products
Employment activities (part)	78	
Security and investigation activities	80	
Office admin, office support and other business support activities	82	
Public administration and defence; compulsory social security	84.1	Administration of the State and the economic and social policy of the community
	84.3	Compulsory social security activities

Note:
SIC 78, Employment Activities, covers workers employed through agencies in all activity sectors. They should be redistributed across the whole economy, both to B-class sectors and other sectors, in proportion to each sector's share of total employment

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4. On a technical note, most economic forecasts show around 20-30 broad activity sectors, a much coarser-grained classification than the SIC sectors in the table above. For example, the table counts as a B-space activity only part of the Construction industry (SIC 43.2, 43.3 and 43.9), whereas forecasts typically show only Construction as a whole (SIC 43). To estimate future employment in sub-sectors such as SIC 43.2, we assume that the share of each sub-sector's employment in its 'parent' sector stays constant.

5. There are two further technical difficulties with the relationship of sectors to land uses. The first is that the line between production space (factories and workshops) and warehousing is blurred. This is not surprising, because manufacturing and warehousing largely occupy the same kinds of buildings, many units combine both functions in proportions that vary over time, and smaller buildings are allowed to shift between the two without planning permission.

6. In setting total land provision targets, therefore, factories, workshops and warehouses, should be merged into a single 'industrial' category. This should not cause any problems, because these uses operate in similar buildings and at similar employment densities, except for very large units including strategic warehousing. In areas where they form a significant part of the stock, these large units should be allowed for separately.

7. The other problem with the tables is that some of the jobs which the table allocates to industrial space are in fact in offices. These jobs are probably in administration, sales and marketing functions of industrial and related businesses. A construction or plumbing business, for example, will often have an office that deals with orders, appointments, record-keeping and the like. In some cases this will be ancillary to an industrial unit and therefore not count as office space, but in other cases it will be free-standing. If the business is small, the office may be its only premises.

8. In total, the Yorkshire and Humber survey found that around one tenth of the jobs which our method allocates to industrial space (factories, workshops and warehouses) are in fact in offices. For a large area such as the region, this is too small a proportion to distort land provision targets. But in some local authority areas, especially the more highly urbanised, it is likely that the distortion is significant. Employment land reviews should aim to correct these distortions, using local knowledge to adjust the relationships shown in the tables above.

9. There are many other, place-specific factors why the sector-to-land-use relationships in the tables above may be invalid. For example, in some places large business units are assigned to the wrong sector or the wrong side of the local authority boundary. In other places, particular sectors are untypical and do not occupy the kinds of space that one would normally expect. In one local authority area in England, for example, there are many jobs classified to Other Supporting Land Transport Activities, SIC 52.21, which normally would occupy warehousing in the local authority area. But in this case most of the SIC 52.21 jobs relate to railway maintenance and the people concerned work all over the country, mostly outdoors.

10. Where such anomalies arise, close inspection of the numbers, combined with local knowledge, should help correct the statistics and customise the sector-to-land-use assumptions.

11. However, it is inevitable that sector-to-land-use relationships are less reliable for small than larger areas. As the Yorkshire and Humber survey illustrated, the relationships shown in our tables work very well for whole regions. But they are not reliable for individual buildings or employment areas, and may not be reliable at local authority level. This is one of the reasons why demand forecasts are more robust for regions that individual local authority areas.

12. The Yorkshire and Humber report provides further information and advice on sector-to-land-use relationships.

A.3 Annex – Sector to land use *[see over]*

Industry Sub-class (5 digit Standard Industrial Codes)		B class Sector (Experian Economics)	Main employment land use
10110	Processing and preserving of meat	Food, Drink & Tobacco	Manufacturing
10120	Processing and preserving of poultry meat	Food, Drink & Tobacco	Manufacturing
10130	Production of meat and poultry meat products	Food, Drink & Tobacco	Manufacturing
10200	Processing and preserving of fish, crustaceans and molluscs	Food, Drink & Tobacco	Manufacturing
10310	Processing and preserving of potatoes	Food, Drink & Tobacco	Manufacturing
10320	Manufacture of fruit and vegetable juice	Food, Drink & Tobacco	Manufacturing
10390	Other processing and preserving of fruit and vegetables	Food, Drink & Tobacco	Manufacturing
10410	Manufacture of oils and fats	Food, Drink & Tobacco	Manufacturing
10420	Manufacture of margarine and similar edible fats	Food, Drink & Tobacco	Manufacturing
10511	Liquid milk and cream production	Food, Drink & Tobacco	Manufacturing
10512	Butter and cheese production	Food, Drink & Tobacco	Manufacturing
10519	Manufacture of milk products (other than liquid milk and cream,butter, cheese) nec	Food, Drink & Tobacco	Manufacturing
10520	Manufacture of ice cream	Food, Drink & Tobacco	Manufacturing
10611	Grain milling	Food, Drink & Tobacco	Manufacturing
10612	Manufacture of breakfast cereals and cereals-based foods	Food, Drink & Tobacco	Manufacturing
10620	Manufacture of starches and starch products	Food, Drink & Tobacco	Manufacturing
10710	Manufacture of bread; manufacture of fresh pastry goods and cakes	Food, Drink & Tobacco	Manufacturing
10720	Manufacture of rusks and biscuits; manufacture of preserved pastry goods and cakes	Food, Drink & Tobacco	Manufacturing
10730	Manufacture of macaroni, noodles, couscous and similar farinaceous products	Food, Drink & Tobacco	Manufacturing
10810	Manufacture of sugar	Food, Drink & Tobacco	Manufacturing
10821	Manufacture of cocoa, and chocolate confectionery	Food, Drink & Tobacco	Manufacturing
10822	Manufacture of sugar confectionery	Food, Drink & Tobacco	Manufacturing
10831	Tea processing	Food, Drink & Tobacco	Manufacturing
10832	Production of coffee and coffee substitutes	Food, Drink & Tobacco	Manufacturing
10840	Manufacture of condiments and seasonings	Food, Drink & Tobacco	Manufacturing
10850	Manufacture of prepared meals and dishes	Food, Drink & Tobacco	Manufacturing
10860	Manufacture of homogenised food preparations and dietetic food	Food, Drink & Tobacco	Manufacturing
10890	Manufacture of other food products nec	Food, Drink & Tobacco	Manufacturing
10910	Manufacture of prepared feeds for farm animals	Food, Drink & Tobacco	Manufacturing
10920	Manufacture of prepared pet foods	Food, Drink & Tobacco	Manufacturing
11010	Distilling, rectifying and blending of spirits	Food, Drink & Tobacco	Manufacturing
11020	Manufacture of wine from grape	Food, Drink & Tobacco	Manufacturing
11030	Manufacture of cider and other fruit wines	Food, Drink & Tobacco	Manufacturing
11040	Manufacture of other non-distilled fermented beverages	Food, Drink & Tobacco	Manufacturing
11050	Manufacture of beer	Food, Drink & Tobacco	Manufacturing
11060	Manufacture of malt	Food, Drink & Tobacco	Manufacturing
11070	Manufacture of soft drinks; production of mineral waters and other bottled waters	Food, Drink & Tobacco	Manufacturing
12000	Manufacture of tobacco products	Food, Drink & Tobacco	Manufacturing
13100	Preparation and spinning of textile fibres	Textiles & Clothing	Manufacturing
13200	Weaving of textiles	Textiles & Clothing	Manufacturing
13300	Finishing of textiles	Textiles & Clothing	Manufacturing
13910	Manufacture of knitted and crocheted fabrics	Textiles & Clothing	Manufacturing
13921	Manufacture of soft furnishings	Textiles & Clothing	Manufacturing
13922	Manufacture of canvas goods, sacks etc	Textiles & Clothing	Manufacturing
13923	Manufacture of household textiles (other than soft furnishings of 13921)	Textiles & Clothing	Manufacturing
13931	Manufacture of woven or tufted carpets and rugs	Textiles & Clothing	Manufacturing
13939	Manufacture of carpets and rugs (other than woven or tufted) nec	Textiles & Clothing	Manufacturing
13940	Manufacture of cordage, rope, twine and netting	Textiles & Clothing	Manufacturing
13950	Manufacture of non-wovens and articles made from non-wovens, except apparel	Textiles & Clothing	Manufacturing
13960	Manufacture of other technical and industrial textiles	Textiles & Clothing	Manufacturing
13990	Manufacture of other textiles nec	Textiles & Clothing	Manufacturing
14110	Manufacture of leather clothes	Textiles & Clothing	Manufacturing
14120	Manufacture of workwear	Textiles & Clothing	Manufacturing
14131	Manufacture of men's outerwear, other than leather clothes and workwear	Textiles & Clothing	Manufacturing
14132	Manufacture of women's outerwear, other than leather clothes and workwear	Textiles & Clothing	Manufacturing
14141	Manufacture of men's underwear	Textiles & Clothing	Manufacturing
14142	Manufacture of women's underwear	Textiles & Clothing	Manufacturing
14190	Manufacture of other wearing apparel and accessories	Textiles & Clothing	Manufacturing
14200	Manufacture of articles of fur	Textiles & Clothing	Manufacturing
14310	Manufacture of knitted and crocheted hosiery	Textiles & Clothing	Manufacturing
14390	Manufacture of other knitted and crocheted apparel	Textiles & Clothing	Manufacturing
15110	Tanning and dressing of leather; dressing and dyeing of fur	Textiles & Clothing	Manufacturing
15120	Manufacture of luggage, handbags and the like, saddlery and harness	Textiles & Clothing	Manufacturing
15200	Manufacture of footwear	Textiles & Clothing	Manufacturing
16100	Sawmilling and planing of wood	Wood & Paper	Manufacturing
16210	Manufacture of veneer sheets and wood-based panels	Wood & Paper	Manufacturing
16220	Manufacture of assembled parquet floors	Wood & Paper	Manufacturing
16230	Manufacture of other builders' carpentry and joinery	Wood & Paper	Manufacturing
16240	Manufacture of wooden containers	Wood & Paper	Manufacturing
16290	Manufacture of other products of wood; manufacture of articles of cork, straw and plaiting materials	Wood & Paper	Manufacturing
17110	Manufacture of pulp	Wood & Paper	Manufacturing
17120	Manufacture of paper and paperboard	Wood & Paper	Manufacturing
17211	Manufacture of corrugated paper and paperboard; manufacture of sacks and bags of paper	Wood & Paper	Manufacturing
17219	Manufacture of paper and paperboard containers other than sacks and bags	Wood & Paper	Manufacturing
17220	Manufacture of household and sanitary goods and of toilet requisites	Wood & Paper	Manufacturing
17230	Manufacture of paper stationery	Wood & Paper	Manufacturing
17240	Manufacture of wallpaper	Wood & Paper	Manufacturing
17290	Manufacture of other articles of paper and paperboard	Wood & Paper	Manufacturing
18110	Printing of newspapers	Printing and Reproduction of Recorded Media	Manufacturing
18121	Manufacture of printed labels	Printing and Reproduction of Recorded Media	Manufacturing
18129	Printing (other than printing of newspaper s and printing on labels and tags) nec	Printing and Reproduction of Recorded Media	Manufacturing
18130	Pre-press and pre-media services	Printing and Reproduction of Recorded Media	Manufacturing
18140	Binding and related services	Printing and Reproduction of Recorded Media	Manufacturing
18201	Reproduction of sound recording	Printing and Reproduction of Recorded Media	Manufacturing
18202	Reproduction of video recording	Printing and Reproduction of Recorded Media	Manufacturing
18203	Reproduction of computer media	Printing and Reproduction of Recorded Media	Manufacturing
19100	Manufacture of coke oven products	Fuel Refining	Manufacturing
19201	Mineral oil refining	Fuel Refining	Manufacturing
19209	Other treatment of petroleum products (excluding mineral oil refining petrochemicals manufacture)	Fuel Refining	Manufacturing
20110	Manufacture of industrial gases	Chemicals	Manufacturing
20120	Manufacture of dyes and pigments	Chemicals	Manufacturing
20130	Manufacture of other inorganic basic chemicals	Chemicals	Manufacturing
20140	Manufacture of other organic basic chemicals	Chemicals	Manufacturing
20150	Manufacture of fertilisers and nitrogen compounds	Chemicals	Manufacturing
20160	Manufacture of plastics in primary forms	Chemicals	Manufacturing
20170	Manufacture of synthetic rubber in primary forms	Chemicals	Manufacturing
20200	Manufacture of pesticides and other agrochemical products	Chemicals	Manufacturing
20301	Manufacture of paints, varnishes and similar coatings, mastics and sealants	Chemicals	Manufacturing
20302	Manufacture of printing ink	Chemicals	Manufacturing

Industry Sub-class (5 digit Standard Industrial Codes)		B class Sector (Experian Economics)	Main employment land use
20411	Manufacture of soap and detergents	Chemicals	Manufacturing
20412	Manufacture of cleaning and polishing preparations	Chemicals	Manufacturing
20420	Manufacture of perfumes and toilet preparations	Chemicals	Manufacturing
20510	Manufacture of explosives	Chemicals	Manufacturing
20520	Manufacture of glues	Chemicals	Manufacturing
20530	Manufacture of essential oils	Chemicals	Manufacturing
20590	Manufacture of other chemical products nec	Chemicals	Manufacturing
20600	Manufacture of man-made fibres	Chemicals	Manufacturing
21100	Manufacture of basic pharmaceutical products	Pharmaceuticals	Manufacturing
21200	Manufacture of pharmaceutical preparations	Pharmaceuticals	Manufacturing
22110	Manufacture of rubber tyres and tubes; retreading and rebuilding of rubber tyres	Rubber, Plastic and Other Non-Metallic Mineral Products	Manufacturing
22190	Manufacture of other rubber products	Rubber, Plastic and Other Non-Metallic Mineral Products	Manufacturing
22210	Manufacture of plastic plates, sheets, tubes and profiles	Rubber, Plastic and Other Non-Metallic Mineral Products	Manufacturing
22220	Manufacture of plastic packing goods	Rubber, Plastic and Other Non-Metallic Mineral Products	Manufacturing
22230	Manufacture of builders� ware of plastic	Rubber, Plastic and Other Non-Metallic Mineral Products	Manufacturing
22290	Manufacture of other plastic products	Rubber, Plastic and Other Non-Metallic Mineral Products	Manufacturing
23110	Manufacture of flat glass	Rubber, Plastic and Other Non-Metallic Mineral Products	Manufacturing
23120	Shaping and processing of flat glass	Rubber, Plastic and Other Non-Metallic Mineral Products	Manufacturing
23130	Manufacture of hollow glass	Rubber, Plastic and Other Non-Metallic Mineral Products	Manufacturing
23140	Manufacture of glass fibres	Rubber, Plastic and Other Non-Metallic Mineral Products	Manufacturing
23190	Manufacture and processing of other glass, including technical glassware	Rubber, Plastic and Other Non-Metallic Mineral Products	Manufacturing
23200	Manufacture of refractory products	Rubber, Plastic and Other Non-Metallic Mineral Products	Manufacturing
23310	Manufacture of ceramic tiles a nd flags	Rubber, Plastic and Other Non-Metallic Mineral Products	Manufacturing
23320	Manufacture of bricks, tiles a nd construction products, in baked clay	Rubber, Plastic and Other Non-Metallic Mineral Products	Manufacturing
23410	Manufacture of ceramic household and ornamental articles	Rubber, Plastic and Other Non-Metallic Mineral Products	Manufacturing
23420	Manufacture of ceramic sanitary fixtures	Rubber, Plastic and Other Non-Metallic Mineral Products	Manufacturing
23430	Manufacture of ceramic insulating fittings	Rubber, Plastic and Other Non-Metallic Mineral Products	Manufacturing
23440	Manufacture of other technical ceramic products	Rubber, Plastic and Other Non-Metallic Mineral Products	Manufacturing
23490	Manufacture of other ceramic products	Rubber, Plastic and Other Non-Metallic Mineral Products	Manufacturing
23510	Manufacture of cement	Rubber, Plastic and Other Non-Metallic Mineral Products	Manufacturing
23520	Manufacture of lime and plaster	Rubber, Plastic and Other Non-Metallic Mineral Products	Manufacturing
23610	Manufacture of concrete products for construction purposes	Rubber, Plastic and Other Non-Metallic Mineral Products	Manufacturing
23620	Manufacture of plaster products for construction purposes	Rubber, Plastic and Other Non-Metallic Mineral Products	Manufacturing
23630	Manufacture of ready-mixed concrete	Rubber, Plastic and Other Non-Metallic Mineral Products	Manufacturing
23640	Manufacture of mortars	Rubber, Plastic and Other Non-Metallic Mineral Products	Manufacturing
23650	Manufacture of fibre cement	Rubber, Plastic and Other Non-Metallic Mineral Products	Manufacturing
23690	Manufacture of other articles of concrete plaster and cement	Rubber, Plastic and Other Non-Metallic Mineral Products	Manufacturing
23700	Cutting, shaping and finishing of stone	Rubber, Plastic and Other Non-Metallic Mineral Products	Manufacturing
23910	Production of abrasive products	Rubber, Plastic and Other Non-Metallic Mineral Products	Manufacturing
23990	Manufacture of other non-metallic mineral products	Rubber, Plastic and Other Non-Metallic Mineral Products	Manufacturing
24100	Manufacture of basic iron and steel and of ferro-alloys	Metal products	Manufacturing
24200	Manufacture of tubes, pipes, hollow profiles and related fittings, of steel	Metal products	Manufacturing
24310	Cold drawing of bars	Metal products	Manufacturing
24320	Cold rolling of narrow strip	Metal products	Manufacturing
24330	Cold forming or folding	Metal products	Manufacturing
24340	Cold drawing of wire	Metal products	Manufacturing
24410	Precious metals production	Metal products	Manufacturing
24420	Aluminium production	Metal products	Manufacturing
24430	Lead, zinc and tin production	Metal products	Manufacturing
24440	Copper production	Metal products	Manufacturing
24450	Other non-ferrous metal production	Metal products	Manufacturing
24460	Processing of nuclear fuel	Metal products	Manufacturing
24510	Casting of iron	Metal products	Manufacturing
24520	Casting of steel	Metal products	Manufacturing
24530	Casting of light metals	Metal products	Manufacturing
24540	Casting of other non-ferrous metals	Metal products	Manufacturing
25110	Manufacture of metal structures and parts of structures	Metal products	Manufacturing
25120	Manufacture of doors and windows of metals	Metal products	Manufacturing
25210	Manufacture of central heating radiators and boilers	Metal products	Manufacturing
25290	Manufacture of other tanks, reservoirs and containers of metal	Metal products	Manufacturing
25300	Manufacture of steam generators, except central heating hot water boilers	Metal products	Manufacturing
25400	Manufacture of weapons and ammunition	Metal products	Manufacturing
25500	Forging, pressing, stamping and roll-forming of metal; powder metallurgy	Metal products	Manufacturing
25610	Treatment and coating of metals	Metal products	Manufacturing
25620	Machining	Metal products	Manufacturing
25710	Manufacture of cutlery	Metal products	Manufacturing
25720	Manufacture of locks and hinges	Metal products	Manufacturing
25730	Manufacture of tools	Metal products	Manufacturing
25910	Manufacture of steel drums and similar containers	Metal products	Manufacturing
25920	Manufacture of light metal packaging	Metal products	Manufacturing
25930	Manufacture of wire products, chain and springs	Metal products	Manufacturing
25940	Manufacture of fasteners and screw machine products	Metal products	Manufacturing
25990	Manufacture of other fabricated metal products nec	Metal products	Manufacturing
26110	Manufacture of electronic components	Computer & Electronic Products	Manufacturing
26120	Manufacture of loaded electronic boards	Computer & Electronic Products	Manufacturing
26200	Manufacture of computers and peripheral equipment	Computer & Electronic Products	Manufacturing
26301	Manufacture of telegraph and telephone apparatus and equipment	Computer & Electronic Products	Manufacturing
26309	Manufacture of communication equipment (other than telegraph and telephone apparatus and equipment	Computer & Electronic Products	Manufacturing
26400	Manufacture of consumer electronics	Computer & Electronic	Manufacturing
26511	Manufacture of electronic instruments and appliances for measuring, testing, and navigation, except industrial process control equipment navigation, except industrial process control equipment	Computer & Electronic	Manufacturing
26512	Manufacture of electronic industrial process control equipment	Computer & Electronic	Manufacturing
26513	Manufacture of non-electronic instruments and appliances for measuring, testing and navigation, except industrial process control equipment	Computer & Electronic	Manufacturing
26514	Manufacture of non-electronic industrial process control equipment	Computer & Electronic Products	Manufacturing
26520	Manufacture of watches and clocks	Computer & Electronic Products	Manufacturing
26600	Manufacture of irradiation, electromedical and electrottherapeutic equipment	Computer & Electronic Products	Manufacturing
26701	Manufacture of optical precision instruments	Computer & Electronic Products	Manufacturing
26702	Manufacture of photographic and cinematographic equipment	Computer & Electronic Products	Manufacturing
26800	Manufacture of magnetic and optical media	Computer & Electronic Products	Manufacturing
27110	Manufacture of electric motors, generators and transformers	Computer & Electronic Products	Manufacturing
27120	Manufacture of electricity distribution and control apparatus	Computer & Electronic Products	Manufacturing
27200	Manufacture of batteries and accumulators	Computer & Electronic Products	Manufacturing
27310	Manufacture of fibre optic cables	Computer & Electronic Products	Manufacturing
27320	Manufacture of other electronic and electric wires and cables	Computer & Electronic Products	Manufacturing
27330	Manufacture of wiring devices	Computer & Electronic Products	Manufacturing
27400	Manufacture of electric lighting equipment	Computer & Electronic Products	Manufacturing
27510	Manufacture of electric domestic appliances	Computer & Electronic Products	Manufacturing
27520	Manufacture of non-electric domestic appliances	Computer & Electronic Products	Manufacturing
27900	Manufacture of other electrical equipment	Computer & Electronic Products	Manufacturing

Industry Sub-class (5 digit Standard Industrial Codes)		B class Sector (Experian Economics)	Main employment land use
28110	Manufacture of engines and turbines, except aircraft, vehicle and cycle engines	Machinery & Equipment	Manufacturing
28120	Manufacture of fluid power equipment	Machinery & Equipment	Manufacturing
28131	Manufacture of pumps	Machinery & Equipment	Manufacturing
28132	Manufacture of compressors	Machinery & Equipment	Manufacturing
28140	Manufacture of other taps and valves	Machinery & Equipment	Manufacturing
28150	Manufacture of bearings, gears, gearing and driving elements	Machinery & Equipment	Manufacturing
28210	Manufacture of ovens, furnaces and furnace burners	Machinery & Equipment	Manufacturing
28220	Manufacture of lifting and handling equipment	Machinery & Equipment	Manufacturing
28230	Manufacture of office machinery and equipment (except computers and peripheral equipment)	Machinery & Equipment	Manufacturing
28240	Manufacture of power-driven hand tools	Machinery & Equipment	Manufacturing
28250	Manufacture of non-domestic cooling and ventilation equipment	Machinery & Equipment	Manufacturing
28290	Manufacture of other general-purpose machinery nec	Machinery & Equipment	Manufacturing
28301	Manufacture of agricultural tractors	Machinery & Equipment	Manufacturing
28302	Manufacture of agricultural and forestry machinery (other than a gricultural tractors)	Machinery & Equipment	Manufacturing
28410	Manufacture of metal forming machinery	Machinery & Equipment	Manufacturing
28490	Manufacture of other machine tools	Machinery & Equipment	Manufacturing
28910	Manufacture of machinery for metallurgy	Machinery & Equipment	Manufacturing
28921	Manufacture of machinery for mining	Machinery & Equipment	Manufacturing
28922	Manufacture of earthmoving equipment	Machinery & Equipment	Manufacturing
28923	Manufacture of equipment for concrete crushing and screening roadworks	Machinery & Equipment	Manufacturing
28930	Manufacture of machinery for food, beverage and tobacco processing	Machinery & Equipment	Manufacturing
28940	Manufacture of machinery for textile, apparel and leather production	Machinery & Equipment	Manufacturing
28950	Manufacture of machinery for paper and paperboard production	Machinery & Equipment	Manufacturing
28960	Manufacture of plastics and rubber machinery	Machinery & Equipment	Manufacturing
28990	Manufacture of other special-purpose machinery nec	Machinery & Equipment	Manufacturing
29100	Manufacture of motor vehicles	Machinery & Equipment	Manufacturing
29201	Manufacture of bodies (coachwork) for motor vehicles (except caravans)	Machinery & Equipment	Manufacturing
29202	Manufacture of trailers and semi-trailers	Machinery & Equipment	Manufacturing
29203	Manufacture of caravans	Machinery & Equipment	Manufacturing
29310	Manufacture of electrical and electronic equipment for motor vehicles	Machinery & Equipment	Manufacturing
29320	Manufacture of other parts and accessories for motor vehicles	Machinery & Equipment	Manufacturing
30110	Building of ships and floating structures	Machinery & Equipment	Manufacturing
30120	Building of pleasure and sporting boats	Machinery & Equipment	Manufacturing
30200	Manufacture of railway locomotives and rolling stock	Machinery & Equipment	Manufacturing
30300	Manufacture of air and spacecraft and related machinery	Machinery & Equipment	Manufacturing
30400	Manufacture of military fighting vehicles	Machinery & Equipment	Manufacturing
30910	Manufacture of motorcycles	Machinery & Equipment	Manufacturing
30920	Manufacture of bicycles and invalid carriages	Machinery & Equipment	Manufacturing
30990	Manufacture of other transport equipment nec	Machinery & Equipment	Manufacturing
31010	Manufacture of office and shop furniture	Other Manufacturing	Manufacturing
31020	Manufacture of kitchen furniture	Other Manufacturing	Manufacturing
31030	Manufacture of mattresses	Other Manufacturing	Manufacturing
31090	Manufacture of other furniture	Other Manufacturing	Manufacturing
32110	Striking of coins	Other Manufacturing	Manufacturing
32120	Manufacture of jewellery and related articles	Other Manufacturing	Manufacturing
32130	Manufacture of imitation jewellery and related articles	Other Manufacturing	Manufacturing
32200	Manufacture of musical instruments	Other Manufacturing	Manufacturing
32300	Manufacture of sports goods	Other Manufacturing	Manufacturing
32401	Manufacture of professional and arcade games and toys	Other Manufacturing	Manufacturing
32409	Manufacture of games and toys (other than professional and arcade games and toys)	Other Manufacturing	Manufacturing
32500	Manufacture of medical and dental instruments and supplies	Other Manufacturing	Manufacturing
32910	Manufacture of brooms and brushes	Other Manufacturing	Manufacturing
32990	Other manufacturing nec	Other Manufacturing	Manufacturing
33110	Repair of fabricated metal products	Other Manufacturing	Manufacturing
33120	Repair of machinery	Other Manufacturing	Manufacturing
33130	Repair of electronic and optical equipment	Other Manufacturing	Manufacturing
33140	Repair of electrical equipment	Other Manufacturing	Manufacturing
33150	Repair and maintenance of ships and boats	Other Manufacturing	Manufacturing
33160	Repair and maintenance of aircraft and spacecraft	Other Manufacturing	Manufacturing
33170	Repair and maintenance of other transport equipment	Other Manufacturing	Manufacturing
33190	Repair of other equipment	Other Manufacturing	Manufacturing
33200	Installation of industrial machinery and equipment	Other Manufacturing	Manufacturing
37000	Sewerage	Utilities	Other industrial
38110	Collection of non-hazardous waste	Utilities	Other industrial
38120	Collection of hazardous waste	Utilities	Other industrial
38210	Treatment and disposal of non-hazardous waste	Utilities	Other industrial
38220	Treatment and disposal of hazardous waste	Utilities	Other industrial
38310	Dismantling of wrecks	Utilities	Other industrial
38320	Recovery of sorted materials	Utilities	Other industrial
43210	Electrical installation	Specialised Construction Activities	Other industrial
43220	Plumbing, heat and air-conditioning installation	Specialised Construction Activities	Other industrial
43290	Other construction installation	Specialised Construction Activities	Other industrial
43310	Plastering	Specialised Construction Activities	Other industrial
43320	Joinery installation	Specialised Construction Activities	Other industrial
43330	Floor and wall covering	Specialised Construction Activities	Other industrial
43341	Painting	Specialised Construction Activities	Other industrial
43342	Glazing	Specialised Construction Activities	Other industrial
43390	Other building completion and finishing	Specialised Construction Activities	Other industrial
43910	Roofing activities	Specialised Construction Activities	Other industrial
43991	Scaffold erection	Specialised Construction Activities	Other industrial
43999	Specialised construction activities (other than scaffold erection)	Specialised Construction Activities	Other industrial
45200	Maintenance and repair of motor vehicles	Wholesale	Other industrial
45400	Sale, maintenance and repair of motorcycles and related parts and accessories	Wholesale	Other industrial
46110	Agents involved in the sale of agricultural raw materials, live animals, texti and semi-finished goods	Wholesale	Warehousing
46120	Agentsinvolved in the sale of fuels, ores, metals and industrial chemicals	Wholesale	Warehousing
46130	Agentsinvolved in the sale of timber and building materials	Wholesale	Warehousing
46140	Agentsinvolved in the sale of machinery, industrial equipment, ships and aircraft	Wholesale	Warehousing
46150	Agentsinvolved in the sale of furniture, household goods, hardware and ironmongery	Wholesale	Warehousing
46160	Agents involved in the sale of textiles, clothing, fur, footwear and leather goods	Wholesale	Warehousing
46170	Agents involved in the sale of food, beverages and tobacco	Wholesale	Warehousing
46180	Agents specialised in the sale of other particular products	Wholesale	Warehousing
46190	Agents involved in the sale of a variety of goods	Wholesale	Warehousing
46210	Wholesale of grain, unmanufactured tobacco, seeds and animal feeds	Wholesale	Warehousing
46220	Wholesale of flowers and plants	Wholesale	Warehousing
46230	Wholesale of live animals	Wholesale	Warehousing
46240	Wholesale of hides, skins and leather	Wholesale	Warehousing
46310	Wholesale of fruit and vegetables	Wholesale	Warehousing
46320	Wholesale of meat and meat products	Wholesale	Warehousing
46330	Wholesale of dairy products, eggs and edible oils and fats	Wholesale	Warehousing
46341	Wholesale of fruit and vegetable juices, mineral waters and soft drinks	Wholesale	Warehousing
46342	Wholesale of wine, beer, spirits and other alcoholic beverages	Wholesale	Warehousing

Industry Sub-class (5 digit Standard Industrial Codes)		B class Sector (Experian Economics)	Main employment land use
46350	Wholesale of tobacco products	Wholesale	Warehousing
46360	Wholesale of sugar and chocolate and sugar confectionery	Wholesale	Warehousing
46370	Wholesale of coffee, tea, cocoa and spices	Wholesale	Warehousing
46380	Wholesale of other food, including fish, crustaceans and molluscs	Wholesale	Warehousing
46390	Non-specialised wholesale of food, beverages and tobacco	Wholesale	Warehousing
46410	Wholesale of textiles	Wholesale	Warehousing
46420	Wholesale of clothing and footwear	Wholesale	Warehousing
46431	Wholesale of gramophone records, audio tapes, compact discs and video tapes and of the equipment on which these are played)	Wholesale	Warehousing
46439	Wholesale of radio and television goods and of electrical household appliances (other than of gramophone records, audio tapes,compact discs and video tapes and the equipment on which these are played)	Wholesale	Warehousing
46440	Wholesale of china and glassware and cleaning materials	Wholesale	Warehousing
46450	Wholesale of perfume and cosmetics	Wholesale	Warehousing
46460	Wholesale of pharmaceutical goods	Wholesale	Warehousing
46470	Wholesale of furniture, carpets and lighting equipment	Wholesale	Warehousing
46480	Wholesale of watches and jewellery	Wholesale	Warehousing
46491	Wholesale of musical instruments	Wholesale	Warehousing
46499	Wholesale of household goods (other than musical instruments) nec	Wholesale	Warehousing
46510	Wholesale of computers, computer peripheral equipment and software	Wholesale	Warehousing
46520	Wholesale of electronic and telecommunications equipment and parts	Wholesale	Warehousing
46610	Wholesale of agricultural machinery, equipment and supplies	Wholesale	Warehousing
46620	Wholesale of machine tools	Wholesale	Warehousing
46630	Wholesale of mining, construction and civil engineering machinery	Wholesale	Warehousing
46640	Wholesale of machinery for the textile industry and of sewing and knitting machines	Wholesale	Warehousing
46650	Wholesale of office furniture	Wholesale	Warehousing
46660	Wholesale of other office machinery and equipment	Wholesale	Warehousing
46690	Wholesale of other machinery and equipment	Wholesale	Warehousing
46711	Wholes ale of petroleum and petroleum products	Wholesale	Warehousing
46719	Wholes ale of fuels and related products (other than petroleum and petroleum products)	Wholesale	Warehousing
46720	Wholesale of metals and metal ores	Wholesale	Warehousing
46730	Wholesale of wood, construction materials and sanitary equipment	Wholesale	Warehousing
46740	Wholesale of hardware, plumbing and heating equipment and supplies	Wholesale	Warehousing
46750	Wholesale of chemical products	Wholesale	Warehousing
46760	Wholesale of other intermediate products	Wholesale	Warehousing
46770	Wholesale of waste and scrap	Wholesale	Warehousing
46900	Non-specialised wholesale trade	Wholesale	Warehousing
49410	Freight transport by road	Land Transport, Storage & Post	Warehousing
49420	Removal services	Land Transport, Storage & Post	Warehousing
52101	Operation of warehousing and storage facilities for water transport activities of division 50	Land Transport, Storage & Post	Warehousing
52102	Operation of warehousing and storage facilities for air transport activities of division 51	Land Transport, Storage & Post	Warehousing
52103	Operation of warehousing and storage facilities for land transport activities of division 49	Land Transport, Storage & Post	Warehousing
52211	Operation of rail freight terminals	Land Transport, Storage & Post	Warehousing
52212	Operation of rail passenger facilities at railway stations	Land Transport, Storage & Post	Warehousing
52213	Operation of bus and coach passenger facilities at bus and coach stations	Land Transport, Storage & Post	Warehousing
52219	Other service activities incidental to land transportation, nec (not including operation of rail freight terminals, passenger facilities at railway ies at railway stations or passenger facilities at bus and coachstations or passenger facilities at railway stations or passenger facilities at bus and coach stations)	Land Transport, Storage & Post	Warehousing
52241	Cargo handling for water transport activities of division 50	Land Transport, Storage & Post	Warehousing
52242	Cargo handling for air transport activities of division 51	Land Transport, Storage & Post	Warehousing
52243	Cargo handling for land transport activities of division 49	Land Transport, Storage & Post	Warehousing
53100	Postal activities under universal service obligation	Land Transport, Storage & Post	Warehousing
53201	Licensed Carriers	Land Transport, Storage & Post	Warehousing
53202	Unlicensed Carriers	Land Transport, Storage & Post	Warehousing
58110	Book publishing	Media Activities	Office
58120	Publishing of directories and mailing lists	Media Activities	Office
58130	Publishing of newspapers	Media Activities	Office
58141	Publishing of learned journals	Media Activities	Office
58142	Publishing of consumer, business and professional journals and periodicals	Media Activities	Office
58190	Other publishing activities	Media Activities	Office
59111	Motion picture production activities	Media Activities	Office
59112	Video production activities	Media Activities	Office
59113	Television programme production activities	Media Activities	Office
59120	Motion picture, video and television programme post-production activities	Media Activities	Office
59131	Motion picture distribution activities	Media Activities	Office
59132	Video distribution activities	Media Activities	Office
59133	Television programme distribution activities	Media Activities	Office
59200	Sound recording and music publishing activities	Media Activities	Office
60100	Radio broadcasting	Media Activities	Office
60200	Television programming and broadcasting activities	Media Activities	Office
62011	Ready-made interactive leisure and entertainment software development	Computing & Information Services	Office
62012	Business and domestic software development	Computing & Information Services	Office
62020	Computer consultancy activities	Computing & Information Services	Office
62030	Computer facilities management activities	Computing & Information Services	Office
62090	Other information technology and computer service activities	Computing & Information Services	Office
63110	Data processing, hosting and related activities	Computing & Information Services	Office
63120	Web portals	Computing & Information Services	Office
63910	News agency activities	Computing & Information Services	Office
63990	Other information service activities nec	Computing & Information Services	Office
64110	Central banking	Finance	Office
64191	Banks	Finance	Office
64192	Building societies	Finance	Office
64201	Activities of agricultural holding companies	Finance	Office
64202	Activities of production holding companies	Finance	Office
64203	Activities of construction holding companies	Finance	Office
64204	Activities of distribution holding companies	Finance	Office
64205	Activities of financial services holding companies	Finance	Office
64209	Activities of other holding companies (not including agricultural, production, construction, distribution and financial services holding companies) n.e.c	Finance	Office
64301	Activities of investment trusts	Finance	Office
64302	Activities of unit trusts	Finance	Office
64303	Activities of venture and development capital companies	Finance	Office
64304	Activities of open-ended investment companies	Finance	Office
64305	Activities of property unit trusts	Finance	Office
64306	Activities of real estate investment trusts	Finance	Office
64910	Financial leasing	Finance	Office
64921	Credit granting by non-deposit taking finance houses and other specialist consumer credit grantors	Finance	Office
64922	Activities of mortgage finance companies	Finance	Office

Industry Sub-class (5 digit Standard Industrial Codes)		B class Sector (Experian Economics)	Main employment land use
64929	Other credit granting (not including credit granting by non-deposit taking finance houses and other specialist consumer credit grantors and activities of mortgage finance companies) n.e.c.	Finance	Office
64991	Security dealing on own account	Finance	Office
64992	Factoring	Finance	Office
64999	Other financial service activities, except insurance and pension funding, (not including security dealing on own account and factoring) n.e.c.	Finance	Office
65110	Life insurance	Insurance & Pensions	Office
65120	Non-life insurance	Insurance & Pensions	Office
65201	Life reinsurance	Insurance & Pensions	Office
65202	Non-life reinsurance	Insurance & Pensions	Office
65300	Pension funding	Insurance & Pensions	Office
66110	Administration of financial markets	Finance	Office
66120	Security and commodity contracts brokerage	Finance	Office
66190	Other activities auxiliary to financial services, except insurance and pension funding	Finance	Office
66210	Risk and damage evaluation	Finance	Office
66220	Activities ofinsurance agents and brokers	Finance	Office
66290	Other activities auxiliary to insurance and pension funding	Finance	Office
66300	Fund management activities	Finance	Office
68100	Buying and selling of own real estate	Real Estate	Office
68201	Renting and operating of Housing Association real estate	Real Estate	Office
68202	Letting and operating of conference and exhibition centres	Real Estate	Office
68209	Letting and operating of own or leased real estate (other than Housing Association real estate and conference and exhibition services) n.e.c.	Real Estate	Office
68310	Real estate agencies	Real Estate	Office
68320	Management of real estate on a fee or contract basis	Real Estate	Office
69101	Barristers at law	Professional services	Office
69102	Solicitors	Professional services	Office
69109	Activities of patent and copyright agents; other legal activities (other than those of barristers and solicitors) nec	Professional services	Office
69201	Accounting, and auditing activities	Professional services	Office
69202	Bookkeeping activities	Professional services	Office
69203	Tax consultancy	Professional services	Office
70100	Activities of head offices	Professional services	Office
70210	Public relations and communication activities	Professional services	Office
70221	Financial management	Professional services	Office
70229	Management consultancy activities (other than financial management)	Professional services	Office
71111	Architectural activities	Professional services	Office
71112	Urban planning and landscape architectural activities	Professional services	Office
71121	Engineering design activities for industrial process and production	Professional services	Office
71122	Engineering related scientific and technical consulting activities	Professional services	Office
71129	Other engineering activities (not including engineering design for industrial process and production or engineering related scientific and technical consulting activities)	Professional services	Office
71200	Technical testing and analysis	Professional services	Office
72110	Research and experimental development on biotechnology	Professional services	Office
72190	Other research and experimental development on natural sciences and engineering	Professional services	Office
72200	Research and experimental development on social sciences and humanities	Professional services	Office
73110	Advertising agencies	Professional services	Office
73120	Media representation	Professional services	Office
73200	Market research and public opinion polling	Professional services	Office
74300	Translation and interpretation activities	Professional services	Office
74901	Environmental consulting activities	Professional services	Office
74902	Quantity surveying activities	Professional services	Office
74909	Other professional, scientific and technical activities (not including environmental consultancy or quantity surveying)	Professional services	Office
77400	Leasing of intellectual property and similar products, except copyrighted works	Administrative & Supportive Service Activities	Office
78101	Motion picture, television and other theatrical casting	Administrative & Supportive Service Activities	Office
78109	Activities of employment placement agencies (other than motion picture, television and other theatrical casting) nec	Administrative & Supportive Service Activities	Office
78200	Temporary employment agency activities	Administrative & Supportive Service Activities	Office
78300	Other human resources provision	Administrative & Supportive Service Activities	Office
80100	Private security activities	Administrative & Supportive Service Activities	Office
80200	Security systems service activities	Administrative & Supportive Service Activities	Office
80300	Investigation activities	Administrative & Supportive Service Activities	Office
82110	Combined office administrative service activities	Administrative & Supportive Service Activities	Office
82190	Photocopying, document preparation and other specialised office support activities	Administrative & Supportive Service Activities	Office
82200	Activities of call centres	Administrative & Supportive Service Activities	Office
82301	Activities of exhibition and fair organizers	Administrative & Supportive Service Activities	Office
82302	Activities of conference organizers	Administrative & Supportive Service Activities	Office
82911	Activities of collection agencies	Administrative & Supportive Service Activities	Office
82912	Activities of credit bureaus	Administrative & Supportive Service Activities	Office
82920	Packaging activities	Administrative & Supportive Service Activities	Warehousing
82990	Other business support service activities nec	Administrative & Supportive Service Activities	Office
84110	General public administration activities	Public Administration & Defence	Office
84120	Regulation of the activities of providing health care, education, cultural services and other social services, excluding social security	Public Administration & Defence	Office
84130	Regulation of and contribution to more efficient operation of businesses	Public Administration & Defence	Office
84210	Foreign affairs	Public Administration & Defence	Office
84300	Compulsory social security activities	Public Administration & Defence	Office
94110	Activities of business and employers membership organisations	Other Private Services	Office
94120	Activities of professional membership organisations	Other Private Services	Office
94200	Activities of trade unions	Other Private Services	Office
94910	Activities of religious organisations	Other Private Services	Office
94920	Activities of political organisations	Other Private Services	Office
94990	Activities of other membership organisations nec	Other Private Services	Office
95110	Repair of computers and peripheral equipment	Other Private Services	Other industrial
95120	Repair of communication equipment	Other Private Services	Other industrial
95210	Repair of consumer electronics	Other Private Services	Other industrial
95220	Repair of household appliances and home and garden equipment	Other Private Services	Other industrial
95230	Repair of footwear and leather goods	Other Private Services	Other industrial
95240	Repair of furniture and home furnishings	Other Private Services	Other industrial
95250	Repair of watches, clocks and jewellery	Other Private Services	Other industrial
95290	Repair of other personal and household goods	Other Private Services	Other industrial

APPENDIX B STAKEHOLDER WORKSHOP ATTENDEES

Firms / organisations represented at the 6th November 2017 workshop:

Duchy of Cornwall	Roger Hepher
Duchy of Cornwall	Nick Pollock
George Wilson Holdings Limited	George Wilson
Harrisons Surveyors	Brian Cox
Hume Planning	Alister Hume
Locate In Kent	Paul Wookie
Paul Sharpe Associates LLP	Paul Sharpe
Propernomics	Simon Ward
Quinn Estates Ltd	Mark Quinn
Quinn Estates Ltd	Tim Chilvers
Sheppey Limited	Charles Stevens
Trenport Investments Limited	Chris Hall
Vincent & Gorbing	Chris Hall
Vincent Trust	Angus Scott

APPENDIX C EXPERIAN ECONOMIC FORECAST

SIC Section Code	Workforce Jobs by Category	2000	2016	2036
		Jobs (000s)		
A	Agriculture, Forestry & Fishing	1.2	1.6	1.9
B	Extraction & Mining	0.0	0.0	0.0
C	Fuel Refining	0.0	0.0	0.0
C	Printing and Recorded Media (manufacture of)	0.0	0.0	0.0
C	Textiles & Clothing (manufacture of)	1.0	0.0	0.0
C	Chemicals (manufacture of)	1.1	0.1	0.1
C	Computer & Electronic Products (manufacture of)	0.4	0.2	0.2
C	Machinery & Equipment (manufacture of)	0.9	0.4	0.4
C	Pharmaceuticals (manufacture of)	0.3	0.4	0.4
C	Wood & Paper (manufacture of)	1.9	0.6	0.4
C	Other Manufacturing	0.6	0.8	0.5
C	Transport Equipment (manufacture of)	0.2	0.7	0.7
C	Food, Drink & Tobacco (manufacture of)	0.7	1.1	0.8
C	Metal Products (manufacture of)	1.7	1.1	0.8
C	Non-Metallic Products (manufacture of)	1.7	1.3	0.9
D/E	Utilities	0.7	0.9	1.0
F	Civil Engineering	0.3	0.4	0.5
F	Construction of Buildings	0.7	1.6	2.1
F	Specialised Construction Activities	2.4	3.2	4.5
G	Wholesale	3.6	3.3	3.0
G	Retail	4.4	5.3	5.4
H	Air & Water Transport	0.0	0.0	0.0
H	Land Transport, Storage & Post	3.6	5.8	7.2
I	Accommodation & Food Services	2.4	3.6	4.2
J	Media Activities	0.0	0.0	0.0
J	Telecoms	0.0	0.0	0.0
J	Computing & Information Services	0.3	0.8	1.3
K	Insurance & Pensions	0.0	0.0	0.0
K	Finance	0.5	0.6	0.9
L	Real Estate	0.4	0.9	1.5
M	Professional Services	1.6	3.5	5.1
N	Administrative & Supportive Services	3.1	4.6	6.1
O	Public Administration & Defence	2.9	2.5	2.4
P	Education	2.9	5.5	6.9
Q	Health	1.1	1.7	2.1
Q	Residential Care & Social Work	2.7	3.8	5.4
R	Recreation	1.1	1.2	1.2
S	Other Private Services	1.4	1.3	1.4
	TOTAL JOBS	**47.8**	**58.8**	**69.3**

Source: Experian Economics, release September 2017

APPENDIX D SCHEMES AND ALLOCATIONS INCLUDED WITHIN THE SUPPLY CALCULATIONS

Survey 17	SW	Address	Parish	Proposal	B1a Gain	B1b Gain	B1c Gain	Mixed B1 Gain	B2 Gain	B8 Gain	Mixed B1-B8 Gain	B1a Loss	B1b Loss	B1 c Loss	B1 mixed Loss	B2 Loss	B8 Loss	Mixed B1-B8 Loss
C	07/1473	Faversham Foundry, Seager Road	Faversham	Erection of two B1 (business) work/office buildings.	1596	0	0	0	0	0	0	0	0	0	0	0	0	0
C	13/0304	Oak Tree Farm, Bottles Lane, Rodmersham	Rodmersham	Demolition of existing commercial buildings, removal of the existing hard surface areas and the erection of 2 no. live/work units with amenity space, pking, access & l'ping.	203	0	0	0	0	0	0	272	272	272	0	340	1396	0
C	13/1550	Klondyke and Twyford Sites, Rushenden Rd	Queenborough Rd	Site clearance, demolition of existing buildings, remediation, enhancement of the existing flood defences and land raising to form a development platform.	0	0	0	0	0	0	0	0	0	7000	0	0	0	0
C	14/0577	Land west of A249 - Neatscourt Phase 2c	Queenborough	Mix of B1/B2 and A1/A3/A4	0	0	0	697	697	0	0	0	0	0	0	0	0	0
C	14/500537	Queen Phillipa Hotel, High Street	Queenborough	Extension to provide B and B accommodation	0	0	0	0	0	0	0	0	0	0	0	0	0	0
C	14/502729A	Ospringe Brickworks, Sumpter Way	Faversham	O/L demo of existing bldgs, up to 250 new dwellings	0	0	0	0	0	0	0	84	0	0	0	1276	0	0
C	14/503875	5 Conqueror Court	Sittingbourne	Change of use from B1 to D1.	0	0	0	0	0	0	0	300	0	0	0	0	0	0
C	14/505691	62-66 High Street, Milton Regis	Sittingbourne	Cou from A5 to residential	0	0	0	0	0	0	0	0	0	0	0	0	0	0
C	14/506802	Neatscourt marshes	Queenborough	Regional distribution centre with ancillary office	**3875**	**0**	**0**	**0**	**0**	**57072**	0	0	0	0	0	0	0	0
C	15/3141300	Former Macknade Garden Centre, Canterbury Road	Faversham	Dem ex builds & erect public house/restaurant	0	0	0	0	0	0	0	0	0	0	0	0	0	0
C	15/502912	Land at Milton Pipes, Cooks Lane	Sittingbourne	Demo of existing warehouses, new houses	0	0	0	0	0	0	0	0	0	0	0	0	500	0
C	15/503378	Milton Pipes, Gas Rd	Sittingbourne	Cou from B2 to SG - vehicle depot	120	0	0	0	0	0	0	0	0	0	0	500	0	0
C	15/503542	Sondes Arms, Crouch Lane	Selling	Cou / alterations to pub A4 back to pub or shop A1 or Restaurant A3 / residential	0	0	0	0	0	0	0	0	0	0	0	0	0	0
C	15/503668	Green Farm House, The Green	Lower Halstow	COU Dwelling to Bed and Breakfast C1 use (proposed 5 bed's)	0	0	0	0	0	0	0	0	0	0	0	0	0	0
C	15/504205A	3 Railway Terrace	Queenborough	Cou from A5 to D1 (Doctor's surgery)	0	0	0	0	0	0	0	0	0	0	0	0	0	0
C	15/504298	Railway Tavern, Lower Road	Teynham	Cou from A4 (pub) to dwelling	0	0	0	0	0	0	0	0	0	0	0	0	0	0
C	15/504922	74 High Street	Sheerness	LDC - Conv of 1st and 2nd floor offices to flats	0	0	0	0	0	0	0	100	0	0	0	0	0	0
C	15/505108	Unit 8 Anchor Bus Park, Castle Road	Sittingbourne	Extension for office / meeting room	0	0	0	0	0	338	0	0	0	0	0	0	0	0
C	15/506313	Unit A-b, London Road Trading Estate	Sittingbourne	Cou from B1a to A2/B1/D1/D2	0	0	0	0	0	0	0	900	0	0	0	0	0	0
C	15/506974	Gallery Direct Castle Road	Sittingbourne	Warehouse Extension	0	0	0	0	0	3752	0	0	0	0	0	0	0	0
C	15/508073	Bowling Club, South Street	Boughton	Replacement clubhouse	0	0	0	0	0	0	0	0	0	0	0	0	0	0
C	15/509048	4 Park Road	Sittingbourne	COU from B1 to flats	0	0	0	0	0	0	0	244	0	0	0	0	0	0
C	15/509759	Plot 4e, Styles Close, Eurolink Bus. Park	Sittingbourne	New industrial building for B1, B2 & B8	268	0	0	0	1365	682	0	0	0	0	0	0	0	0
C	15/510256	7 High Street	Minster	Demo of bldg, erect 7 flats	0	0	0	0	0	0	0	0	0	0	0	0	0	0
C	16/500261A	Frognal Farmhouse, Lower Road	Teynham	Cou from C2 to C1 (guest house)	0	0	0	0	0	0	0	0	0	0	0	0	0	0
C	16/500379	42 High Street	Sittingbourne	Cou to D1 (beauty therapy school)	0	0	0	0	0	0	0	160	0	0	0	0	0	0
C	16/500905	The Crown, 148 High Street	Sheerness	Cou from A1 to A5	0	0	0	0	0	0	0	0	0	0	0	0	0	0
C	16/501352	12 Market Place	Faversham	Cou to exhibition space with retail, also office on first floor	135	0	0	0	0	0	0	0	0	0	0	0	0	0
C	16/501466	1 The Street (Fox and Goose)	Bapchild	Vacant building to tattoo studio	0	0	0	0	0	0	0	0	0	0	0	0	0	0
C	16/501883	Prospect House, 4 Canterbury Road	Sittingbourne	Loss of existing bldg, new dwellings	0	0	0	0	0	0	0	0	0	0	0	0	0	0
C	16/501961	Unit 7b Sitt Retail Park, Mill Way	Sittingbourne	Creation of larger unit with mezzanine	0	0	0	0	0	0	0	0	0	0	0	0	0	0
C	16/501963	Unit 7a Sitt Retail Park, Mill Way	Sittingbourne	Creation of smaller unit with mezzanine	0	0	0	0	0	0	0	0	0	0	0	0	0	0
C	16/502404	Radio station, Oak Lane	Minster	Cou B8 storage to radio broadcasting unit	0	0	0	0	0	0	0	0	0	0	0	0	55	0
C	16/502856	Unit 2, Dolphin Park, Cremers Road, Eurolink	Sittingbourne	Erection of new industrial building	0	0	0	0	0	648	0	0	0	0	0	0	0	0
C	16/503522	Plots 4a-c Bingham Road, Eurolink	Sittingbourne	Single storey detached office	165	0	0	0	0	0	0	0	0	0	0	0	0	0
C	16/503782	The Tapster Inn, Seed Road	Newnham	Restaurant to two dwellings	0	0	0	0	0	0	0	0	0	0	0	0	0	0
C	16/503885	9 Broadway	Sheerness	Cou from A1 to SG nail bar	0	0	0	0	0	0	0	0	0	0	0	0	0	0

Survey 17	SW	Address	Parish	Proposal	B1a Gain	B1b Gain	B1c Gain	Mixed B1 Gain	B2 Gain	B8 Gain	Mixed B1-B8 Gain	B1a Loss	B1b Loss	B1 c Loss	B1 mixed Loss	B2 Loss	B8 Loss	Mixed B1-B8 Loss
C	16/504042	9 Marine Parade	Sheerness	Conv of offices to 2 flats	0	0	0	0	0	0	0	0	0	0	0	0	56	0
C	16/504361	Clubland, 3 Clock Tower Crescent	Sheerness	Cou nightclub to gym	0	0	0	0	0	0	0	0	0	0	0	0	0	0
C	16/504553	Unit 7 Grace Road, New Road	Sheerness	Cou from B1/B2 to dog grooming salon	0	0	0	0	0	0	0	0	0	0	0	111	0	0
C	16/504605	13 Station Street	Sittingbourne	PN for COU from office (B1a) to flats	0	0	0	0	0	0	0	105	0	0	0	0	0	0
C	16/504812	Plot 4G Styles Close	Sittingbourne	B1/B2/B8 units	0	0	0	0	0	0	1600	0	0	0	0	0	0	0
C	16/505151	Harts Holiday Park, Leysdown Road	Leysdown	Part demo, extension of clubhouse with shop , arcade, laundrette	60	0	0	0	0	48	0	0	0	0	0	0	0	0
C	16/505476	59 East Street	Sittingbourne	Cou from A1 hair salon to resid	0	0	0	0	0	0	0	0	0	0	0	0	0	0
C	16/505697	Trafalgar Court, West Street	Queenborough	Cou from B1/B8 to micropub A4	0	0	0	0	0	0	0	0	0	0	0	0	0	68
C	16/505901	Plot 1a Neatscourt	Queenborough	A1/A3 Retail building	0	0	0	0	0	0	0	0	0	0	0	0	0	0
C	16/506151	134 HighStreet	Sheerness	Cou of A1 (shop) to A1 (Shop) and nail/ beauty salon (Sui Generis)	0	0	0	0	0	0	0	0	0	0	0	0	0	0
C	16/506287	1st floor 13 Cross Lane	Faversham	Cou A1 to residential	0	0	0	0	0	0	0	0	0	0	0	0	0	0
C	16/507083	Unit 14 Craft Marsh Trading Estate, Gas Road	Sittingbourne	Two storey modular office building - retrospective	513	0	0	0	0	0	0	0	0	0	0	0	0	0
C	16/507180	Bridge House, Bridge Road	Sheerness	Cou from Sui Generis to D1 day care centre	0	0	0	0	0	0	0	0	0	0	0	0	0	0
C	16/507200	73-74 Preston Street	Faversham	Cou from A1 and residential to beauty salon	0	0	0	0	0	0	0	0	0	0	0	0	0	0
C	16/507554	Rhode House service station	Sittingbourne	Redevelopment of site incl new retail building	0	0	0	0	0	0	0	0	0	0	0	0	0	0
C	16/507787	Unit 1A Grove Park Shopping Centre, Gadby Road	Bobbing	Cou from A1 to D1 Physio and Podiatry clinic	0	0	0	0	0	0	0	0	0	0	0	0	0	0
C	16/507966A	5 High Street	Sittingbourne	Cou of existing ground floor to shop/ café/office -flats above	0	0	0	0	0	0	0	0	0	0	0	0	0	0
C	16/507988	118 West Street	Faversham	Cou of first floor from office/A2 to flats	0	0	0	0	0	0	0	0	0	0	0	0	0	0
C	16/508500A	27 Broadway	Sheerness	Cou from dry cleaners (A1) into takeaway restaurant (A3/A5)	0	0	0	0	0	0	0	0	0	0	0	0	0	0
C	16/508557	15a Dolphin Park, Upper Field Road	Sittingbourne	Cou to B8, enlargement of yard, car parking, part A1	0	0	0	0	0	1300	0	0	0	0	0	1418	0	0
C	17/500365	The House rear to 1-2 Limes Place, Preston Street	Faversham	Retro. Cou from offices to residential	0	0	0	0	0	0	0	89	0	0	0	0	0	0
				Completed Totals:	6935	0	0	697	2062	63840	1600	2254	272	7272	0	3645	2007	68
NS	02/1180	Land at East Hall Farm	Sittingbourne	Outline application for residential, employment, open space and supporting facilities.	0	0	875	0	875	1750	0	0	0	0	0	0	0	0
NS	06/1468	Neatscourt (phase 1), Queenborough	Queenborough	Commercial development including office industrial and warehousing, petrol filling station, restaurant, hotel Rushenden Relief Road Stage 1 and other highway, servicing, site levelling and infrastructure works. - FLOORSPACE IS APPROX. - HOTEL -	0	0	0	0	0	0		0	0	0	0	0	0	0
NS	08/1127	Land adj Coleshall Farm, Sheppey Way	Iwade	Development of housing, employment up to 3000m2, public open space and pavilion (up to 110 m2)	0	0	0	0	0	0	3000	0	0	0	0	0	0	0
NS	09/0260	Hengist Field, Pond Farm Road, Sittingbourne	Borden	Proposed care home (class C2) and office building (Class B1).	477	0	0	0	0	0	0	0	0	0	0	0	0	0
NS	11/0159	Sittingbourne Mill & Wharf Sites	Sittingbourne	Hybrid application seeking: outline planning permission (Phase 3,4&5) for up to 1,200m2 of leisure use floor space, 250m2 of community floor space, 150 residential units, in buildings ranging from 2 to 4 storeys in height, together with car and cycle	0	0	0	0	0	0	0	0	0	0	0	0	0	0
NS	11/0982	Duke of Kent site, Thanet Way	Graveney	Construction of new B1/B2/B8 units with outside storage.	0	0	0	0	0	0	1092	0	0	0	0	0	0	0
NS	12/0045	Sheerness Docks	Sheerness	OUTLINE - for the demolition of existing buildings & structures (except for) the retention of the existing Ambient Area W4 building & existing Cool Store No. 2 building & use for Nacelle inventory (i.e. nacelle cover, generator, gear, transformer) &	11500	0	0	0	125300	38650	0	0	0	0	0	0	0	123154
NS	13/0165	Rodmersham Cricket Club, Bottles Lane	Rodmersham	Renewal of planning permission SW/09/1272 for change of use of first floor pavilion changing rooms (redundant) to office space use class B1.	65	0	0	0	0	0	0	0	0	0	0	0	0	0
NS	13/1523	Marshalls Mono Ltd, Castle Road	Sittingbourne	Proposed extension to existing production building with additional aggregate storage bins and bulk storage silos.	0	0	0	0	625	190	0	0	0	0	0	0	0	0

Survey 17	SW	Address	Parish	Proposal	B1a Gain	B1b Gain	B1c Gain	Mixed B1 Gain	B2 Gain	B8 Gain	Mixed B1-B8 Gain	B1a Loss	B1b Loss	B1 c Loss	B1 mixed Loss	B2 Loss	B8 Loss	Mixed B1-B8 Loss
NS	13/1576	Macknade Fine Foods, Selling Road	Faversham	Comprehensive redevelopment of the site to provide a new extended food hall, including a café, a food and drink theatre, a retail building, production/distillery, pedestrian courtyard and new access and associated car parking and landscaping.	0	0	0	0	624	231	0	0	0	0	0	0	0	0
NS	14/0045	Land east of Love Lane	Faversham	O/l mixed use incl business park, hotel, pub / restaurant, health centre, open space / sports pitches, dwellings	2000	0	5385	0	0	0	0	0	0	0	0	0	0	0
NS	14/0172	5 Thorndale Business Park, Argent Road	Queenborough	LDC - proposed - MOT testing centre.	0	0	0	0	100	0	0	0	0	0	0	0	100	0
NS	14/0230	84 Holmeside Avenue	Sheerness	Conversion of garage into dental surgery and enlargement of garage with roof alterations.	0	0	0	0	0	0	0	0	0	0	0	0	0	0
NS	14/0371	Sainsbury's Store	Faversham	The construction of an extension of 213m2 to the eastern elevation of the existing store to be used for an ancillary customer café.	0	0	0	0	0	0	0	0	0	0	0	0	0	0
NS	14/0404	The Abbey School London Road	Faversham	New 2 storey classroom block extension to B block, providing 13 no. new classrooms with ancillary accommodation and demolition of existing C block building.	0	0	0	0	0	0	0	0	0	0	0	0	0	0
NS	14/0445	9-11 High Street	Minster	Mixed use development to provide 4 x one bedroom apartments, 1 x two bedroom apartment and 1 shop unit with shop store, together with associated access driveway, refuse store and parking spaces.	0	0	0	0	0	0	0	0	0	0	0	0	0	0
NS	14/0477	Smart House Brielle Way	Sheerness	Demolition of existing workshop and erection of new building for use as a paint spraying workshop.	0	0	239	0	0	0	0	0	0	156	0	0	0	0
NS	14/0543	Unit 4, Centre 2000 St Michaels Road	Sittingbourne	Change of use from B1 - office to D2 - gymnasium.	0	0	0	0	0	0	0	659	0	0	0	0	0	0
NS	14/500327	Land south of Kemsley Mill, Swale Way	Sittingbourne	O/L up to 8000 sq m B1/B2 (+ extension to country park)	0	0	0	4000	4000	0	0	0	0	0	0	0	0	0
NS	14/500338	165 Minster Road	Minster	Side and rear extensions	0	0	0	0	0	0	0	0	0	0	0	0	0	0
NS	14/500646	Clydesdale Manor, Warden Road	Eastchurch	Cou Hut 1 to seminar room, Huts 2 and 3 plus stable to short term accomm.	0	0	0	50	0	0	0	0	0	0	0	0	0	0
NS	14/501573	Sports Ground Seager Road	Sheerness	Replacement clubhouse	0	0	0	0	0	0	0	0	0	0	0	0	0	0
NS	14/502507	Land adjacent to Rushett Bungalow, Rushett Lane	Norton	COU stables to office and workshop B1	0	0	0	100	0	0	0	0	0	0	0	0	0	0
NS	14/502729B	Ospringe Brickworks, Sumpter Way	Faversham	O/L demo of existing bldgs, up to 250 new dwellings	0	0	0	0	0	0	0	84	0	0	0	446	0	0
NS	14/503494	Norton Cross Garage, London Road	Norton	LDC to include MOT centre	0	0	0	0	100	0	0	0	0	0	0	0	0	0
NS	14/503766	Unit A London Road Trading Estate	Sittingbourne	COU B1 to D1 physiotherapy consulting room	0	0	0	0	0	0	0	30	0	0	0	0	0	0
NS	14/503923	Macknade Manor, Canterbury Road	Faversham	Side extension to reception and dining room	0	0	0	0	0	0	0	0	0	0	0	0	0	0
NS	14/504285	119c High Street	Sittingbourne	Shop with two flats above	0	0	0	0	0	0	0	0	0	0	0	0	0	0
NS	14/504984	High Oak Hill	Newington	o/l for 5 dwellings (loss of emp)	0	0	0	0	0	0	0	0	0	0	0	900	0	0
NS	14/506832	14-16 Minster Road	Minster	Renewal of roof structure to create meeting room	122	0	0	0	0	0	0	0	0	0	0	0	0	0
NS	15/500473	Swale Motors Ltd, Crown Quay Lane	Sittingbourne	O/L demo of 3 bldgs, erect new showroom etc	0	0	0	0	0	0	0	0	0	0	0	0	0	0
NS	15/502753	Brett Concrete, Ridham Dock	Iwade	Storage building for concrete	0	0	0	0	0	1265	0	0	0	0	0	0	0	0
NS	15/502904	Cleve Hill Farm, Cleve Hill Road	Graveney	PN - Cou from agricultural lean-to to 3 x B1 units	760	0	0	0	0	0	0	0	0	0	0	0	0	0
NS	15/503072	r/o 115 West Street	Faversham	PN for COU from office to 1 bed flat	0	0	0	0	0	0	0	36	0	0	0	0	0	0
NS	15/503629	Gwelo Farm Barn, Bull Lane	Newington	Cou barn to meeting hall / place of worship	0	0	0	0	0	0	0	0	0	0	0	0	0	0
NS	15/503652	5 Market Street	Faversham	Cou from A1 to A1, A3 and B1	54	0	0	0	0	0	0	0	0	0	0	0	0	0
NS	15/504205B	3 Railway Terrace	Queenborough	Cou from A5 to D1 (Doctor's surgery)	0	0	0	0	0	0	0	0	0	0	0	0	0	0
NS	15/504250	Aspen Drive, Thistle Hill	Minster	2 A1 units	0	0	0	0	0	0	0	0	0	0	0	0	0	0
NS	15/504264	Land at Perry Court, London Road	Faversham	Outline for mixed use inc B1a, B1b, B1c, C1, C2 & A1	11875	3800	2850	0	0	0	0	0	0	0	0	0	0	0
NS	15/505213	Land adj. Thanet Way, Highstreet Road	Hernhill	Importation of waste material/engineering operation/ cou to lorry park and cafe (A3/A5)	0	0	0	0	0	0	0	0	0	0	0	0	0	0
NS	15/505300	33-37 High Street	Sittingbourne	Cou part ground and upper floors to four flats	0	0	0	0	0	0	0	0	0	0	0	0	0	0
NS	15/505670	Land off Plover Road	Minster	Foodstore and 4 retail units A1, A2, A3, A5, or D1	0	0	0	0	0	0	0	0	0	0	0	0	0	0
NS	15/506187	Brickmakers Arms, Gas Road	Sittingbourne	Demo of ind units, 8 new ind units, dwelling to offices	154	0	0	0	265	0	0	0	0	0	0	365	0	0

Survey 17	SW	Address	Parish	Proposal	B1a Gain	B1b Gain	B1c Gain	Mixed B1 Gain	B2 Gain	B8 Gain	Mixed B1-B8 Gain	B1a Loss	B1b Loss	B1 c Loss	B1 mixed Loss	B2 Loss	B8 Loss	Mixed B1-B8 Loss
NS	15/506307	Adj 1 Transit Works, Power Station Road	Minster	Cou from offices to ambulance response post	0	0	0	0	0	0	0	72	0	0	0	0	0	0
NS	15/506501	Adam, Rouilly, Castle Road	Sittingbourne	Extension, larger car park	0	0	0	0	360	0	0	0	0	0	0	0	0	0
NS	15/506678	Land North East of Vicarage Farm, The Street	Lynsted	PN for COU from B8 to C3	0	0	0	0	0	0	0	0	0	0	0	0	126	0
NS	15/508666	Land at Regis Medical Centre, Saffron Way	Sittingbourne	Cou surgery to sale of vehicles	0	0	0	0	0	0	0	0	0	0	0	0	0	0
NS	15/508928	Land adj social club, North Road	Queenborough	Demo of bldg, erect 4 dwellings	0	0	0	0	0	0	0	0	0	0	0	0	0	0
NS	15/509450	Pheasants Farm House, Sheppey Way	Bobbing	Replacement commercial building	0	0	130	0	0	0	0	0	0	110	0	0	0	0
NS	15/509795	44 East Street	Faversham	COU from offices to resid, dem exten & erect new dwell	263	0	0	0	0	0	0	0	0	0	0	0	0	0
NS	15/509993	6 Trinity Road	Sheerness	COU from A2 to C3 residential	0	0	0	0	0	0	0	0	0	0	0	0	0	0
NS	15/510372	Countryside Recycling Ridham Dock	Sittingbourne	Extension to vehicle workshop	0	0	0	0	460	0	0	0	0	0	0	0	0	0
NS	16/501272	r/o 60 Shortlands Road	Sittingbourne	Conv of vehicle workshop to 3 dwellings	0	0	0	0	0	0	0	136	0	0	0	0	0	0
NS	16/502259	124-126 High Street	Sheerness	Cou from greengrocers to Chinese restaurant	0	0	0	0	0	0	0	0	0	0	0	0	0	0
NS	16/502832	5 Trinity Road	Sheerness	Cou from D1 chiropody clinic to residential	0	0	0	0	0	0	0	0	0	0	0	0	0	0
NS	16/503539	Sheppey Motors salvage, Rushenden Road	Queenborough	Commercial unit, divided into 5 smaller units	0	0	0	0	540	0	0	0	0	0	0	0	0	0
NS	16/503575	35-37 High Street	Sittingbourne	Cou part ground floor to 4 dwellings	0	0	0	0	0	0	0	0	0	0	0	0	0	0
NS	16/503687	Import Centre, Thomsett Way	Queenborough	Car preparation workshop	0	0	0	0	600	0	0	0	0	0	0	0	0	0
NS	16/505218	6a East Street	Faversham	Cou from 2nd floor vacant office to 1 bed flat	0	0	0	0	0	0	0	66	0	0	0	0	0	0
NS	16/505592	4 Bell Road	Sittingbourne	Demo of bldg, new flats	0	0	0	0	0	0	0	0	0	0	0	0	0	0
NS	16/505790	23a Preston Street	Faversham	Cou upper floors from offices to resid, with extension	0	0	0	0	0	0	0	0	0	0	0	0	0	0
NS	16/505956	42-44 The Street	Bapchild	Demo of commercial bldgs, 5 new dwellings	0	0	0	0	0	0	0	0	0	402	0	0	0	0
NS	16/506186	White Horse, 99 West Street	Faversham	Cou from Public house to Class C residential use	0	0	0	0	0	0	0	0	0	0	0	0	0	0
NS	16/506265	99 London Road	Teynham	Cou ground floor commercial to 2x1 bed flats	0	0	0	0	0	0	0	90	0	0	0	0	0	0
NS	16/506314	Sweepstakes Farm, Lower Hartlip Road	Hartlip	Cou from B8 to C3	0	0	0	0	0	0	0	0	0	0	0	0	112	0
NS	16/507246	Car park adj. 2 Park Road	Sittingbourne	Demolition of existing stores and erection of ground floor office with 5 one bedroom apartments.	38	0	0	0	0	0	0	40	0	0	0	0	0	0
NS	16/507467/FUI	Land adj Percy Villa, North Road	Queenborough	Demolition of existing workshop to be replaced with a pair of three bedroom semi detached houses.	0	0	0	0	0	0	0	0	0	64	0	0	0	0
NS	16/507574	Regis House, New Road	Sheerness	Part conv on ind unit to 16 new units, with new access road etc	0	0	0	0	0	0	1600	0	0	0	0	1600	0	0
NS	16/507650	Gpharm, Unit 470, Kent Science Park	Milstead	Ext of bldg to provide new production facilities	0	0	0	0	4087	0	0	0	0	0	0	0	0	0
NS	16/507824	10 Park Road	Sittingbourne	Cou from D1 to C3 (2 x two bedroom flats)	0	0	0	0	0	0	0	0	0	0	0	0	0	0
NS	16/507924	Land adj S Line Cargo, Argent Road	Queenborough	Cou of land and erection of building	58	0	0	0	0	350	0	0	0	0	0	0	0	0
NS	16/507966B	5 High Street	Sittingbourne	Cou of existing ground floor to shop/ café/office -flats above	0	0	0	0	0	0	0	0	0	0	0	0	0	0
NS	16/508164	Petrol Station, Morrisons, Mill Way	Sittingbourne	Erection of Side extension	0	0	0	0	0	0	0	0	0	0	0	0	0	0
NS	16/508208	Antolin Interiors, Spade Lane	Upchurch	New warehouse	0	0	0	0	0	1050	0	0	0	0	0	0	0	0
NS	16/508341	Building 1, Standard Quay	Faversham	S/S Ext and COU to Restaurant/gallery/function room	0	0	0	0	0	0	0	0	0	0	0	0	0	0
NS	16/508500B	27 Broadway	Sheerness	Cou from dry cleaners (A1) into takeaway restaurant (A3/A5)	0	0	0	0	0	0	0	0	0	0	0	0	0	0
NS	16/508575	Magpie Playgroup, Boughton Primary School, School Lane	Boughton	Four bay mobile classroom	0	0	0	0	0	0	0	0	0	0	0	0	0	0
NS	17/500069	6A East Street	Faversham	COU from 1st floor vacant office to 2 flats	0	0	0	0	0	0	0	85	0	0	0	0	0	0
NS	17/500381	48-50 Alma Street	Sheerness	Demolition of existing retail unit and erection of 2 storey building; 4 no.1 bedroom flats	0	0	0	0	0	0	0	0	0	0	0	0	0	0
NS	17/500594	Crescent House, Gills Terrace, Otterham Quay Lane	Upchurch	PN for COU from Office (B1a) to 5 dwellings	0	0	0	0	0	0	0	700	0	0	0	0	0	0
NS	CN/13/0001	Crescent House, Otterham Quay Lane	Upchurch	COU from Offices (B1) to residential	0	0	0	0	0	0	0	340	0	0	0	0	0	0
				Not Started Totals:	**27366**	**3800**	**9479**	**4150**	**137936**	**43486**	**5692**	**2338**	**0**	**732**	**0**	**3311**	**338**	**123154**

Survey 17	SW	Address	Parish	Proposal	B1a Gain	B1b Gain	B1c Gain	Mixed B1 Gain	B2 Gain	B8 Gain	Mixed B1-B8 Gain	B1a Loss	B1b Loss	B1 c Loss	B1 mixed Loss	B2 Loss	B8 Loss	Mixed B1-B8 Loss
UC	11/0386	The White House	Minster	Two storey side extension and first floor extension - restaurant.	0	0	0	0	0	0	0	0	0	0	0	0	0	0
UC	12/1594	Prince of Waterloo, 428 Minster Rd	Minster	Proposed change of use of public house to hotel (C1) and erection of single storey side and two storey rear extension to provide bathrooms and toilets together with parking provision and disabled access. - FLOOR SPACE 286m2.	0	0	0	0	0	0	0	0	0	0	0	0	0	0
UC	13/1151	Boughton Golf Course, Brickfield Lane	Boughton	Erection of a new 39 bedroom hotel and linked entrance foyer to clubhouse with associated parking and landscaping, along with alterations and extension to the existing clubhouse. - FLOOR SPACE 2220m2.	0	0	0	0	0	0	0	0	0	0	0	0	0	0
UC	14/501197	The Laundrette Wing Road	Leysdown	Cou from laundrette to hair and beauty salon	0	0	0	0	0	0	0	0	0	0	0	0	0	0
UC	15/501934	Lloyds Wharf, The Wall	Sittingbourne	Barge museum	0	0	0	0	0	0	0	0	0	0	0	0	0	0
UC	15/506198	Fav Football Club, Salters Lane	Faversham	Demolish existing changing room and replace	0	0	0	0	0	0	0	0	0	0	0	0	0	0
UC	15/509195	Land at Castle Road, Eurolink	Sittingbourne	18 industrial units B1-B8	219	219	219	0	656	656	0	0	0	0	0	0	0	0
UC	15/510355	Three Sisters, Otterham Key	Upchurch	Cou of part of extension for ancillary buisness use and café	0	0	41	0	0	0	0	0	0	0	0	0	0	0
UC	15/510589	Eurolink V / Land North of Swale Way	Tonge	O/L for access matters for construction of business park (use class B1(B), B1c, B2 and (B8) (up to a maximum of 46,600m2) etc etc	0	0	0	15500	15500	15600	0	0	0	0	0	0	0	0
UC	16/500261B	Frognal Farmhouse, Lower Road	Teynham	Cou from C2 to C1 (guest house)	0	0	0	0	0	0	0	0	0	0	0	0	0	0
UC	16/500539	The Old School, London Road	Dunkirk	Cou school to dwelling	0	0	0	0	0	0	0	0	0	0	0	0	0	0
UC	16/501726	Ex steelworks, Brielle Way	Sheerness	Cou to port-related uses (sui generis)	0	0	0	0	0	0	0	0	0	0	0	54000	0	0
UC	16/504626	Sittingbourne Community College, Swanstree Avenue	Sittingbourne	Reg 3 - Extension to form classrooms, parking area/access	0	0	0	0	0	0	0	0	0	0	0	0	0	0
UC	16/507575	Excelsior House, Ufton Lane	Sittingbourne	Cou from B1 offices to mix use of A2/dwellings	0	0	0	0	0	0	0	520	0	0	0	0	0	0
				Under Contruction Totals:	**219**	**219**	**260**	**15500**	**16156**	**16256**	**0**	**520**	**0**	**0**	**0**	**54000**	**0**	**0**

ALLOCATIONS

Policy Ref		Site Name	Settlement / Location		B1a	B1b	B1c	Mixed B1	B2	B8	Mixed B1-B8
Regen1		Central Sittingbourne	Sittingbourne		5,000	0	0	0	0	0	0
A1		Ridham and Kemsley	Sittingbourne		0	0	0	0	40,146	40,146	65,693
A1		land at Neats Court	Queenborough		0	0	0	0	0	0	76,064
A3		land at West Minster	Sheerness		0	0	0	2,500	2,500	2,500	0
A5		land at Selling Road	Faversham		0	0	0	6,300	0	0	0
A6		land at Graveney Rd,East of F	Faversham		0	0	0	2,333	2,333	2,334	0
A4		land at Cowstead Corner	Queenborough		0	0	0	0	0	0	0
A4		land at Cowstead Corner	Queenborough		0	0	0	1,867	1,867	1,866	0
MU4		land at Frognal Lane	Teynham		0	0	0	8,947	8,947	8,946	0
		Net Residual			**5,000**	**0**	**0**	**21,947**	**55,793**	**55,792**	**141,757**

APPENDIX E EMPLOYMENT SITES' ASSESSMENT – CRITERIA AND SCORING

E.1 Criteria and scoring

13. The sites' assessment gathers data on a number of criteria that are grouped as follows:

- Basic information
- Constraints
- Attractiveness to occupiers
- Overall review / recommendation.

14. The assessment considers the Borough's existing employment sites, and also the existing site allocations and proposal sites that are assessed in a broadly similar way, with one or two additional fields added such as identifying whether the site is previously developed land.

E.2 Basic information fields

15. The following information is provided:

- Identification number, name, location map, address, description of the site, site area, the primary type of employment (the main use class or alternatively mixed B) and the sites sequential location (within a town or district centre, within 400m of a centre, within the built-up area, adjacent to it or beyond).
- For the existing allocations and possible future sites the basic information also includes current use, whether the site is previously developed land, the principle use proposed and information on planning. The planning information identifies designations, planning history and whether the site plays a role in the delivery of other Council policies.

E.3 Constraints

16. For the existing employment sites constraints are restricted to any bad neighbour impact, which considers the potential impact of particular employment uses on neighbouring uses and vice versa. Some employment uses are noisy and/or dirty and would not be suitable next to uses such as residential, school or office. The impact is scored as per the explanation in the criteria scoring sheet.

17. For the allocations and possible sites this is widened to any physical or policy constraint that may affect availability (which could be immediately, within the plan period or not in the plan period depending on the nature of the constraint (none, minor or major). Physical constraints could include ground conditions, contaminated land/historic landfill site or overhead line buffer. These potential constraints are assessed using the 'none/ minor/ major' scoring format.

E.4 Attractiveness to occupiers

18. The assessments address the external environment, the internal environment, accessibility to the strategic road network, local access by road, access to public transport access and market signals.

19. The assessment scoring range for the first four criteria is – good – reasonable – poor. Relative to each criterion a site that is judged to be very attractive is identified as good, sites of moderate attractiveness are classed as reasonable, and sites we consider to be unattractive to occupiers are rated poor. The assessment of access to public transport is different and the assessment is ‘yes’ or ‘no’ relative to the criteria.

20. Market signals is considered in terms of vacancy for the existing designated sites using the good – reasonable – poor scoring, and information relating to known occupier/developer interest for the site allocations/possible sites.

E.5 Review / Recommendation

21. A review, based on the information as to whether existing employment sites will continue to be occupied (yes, no or maybe where there is some doubt), whether there are opportunities for (re)development and what constraints this may entail and then an overall recommendation – to retain or release.

22. For the site allocations and possible sites, the review considers whether the sites are attractive to potential future occupiers and whether the site is suitable for the identified employment use. The prospects of the site being occupied are summarised and on the basis of the assessment a recommendation is drawn. Allocated sites should either be retailed or deallocated, and possible sites either allocated or not allocated.

23. The table below sets out more detailed explanation of the scoring scales for the criteria where scales are applied.

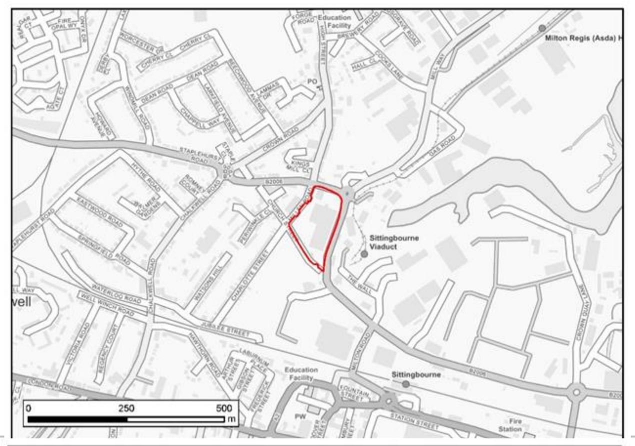
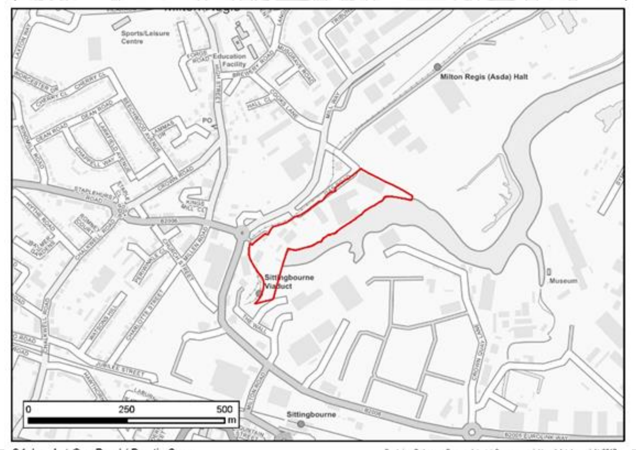
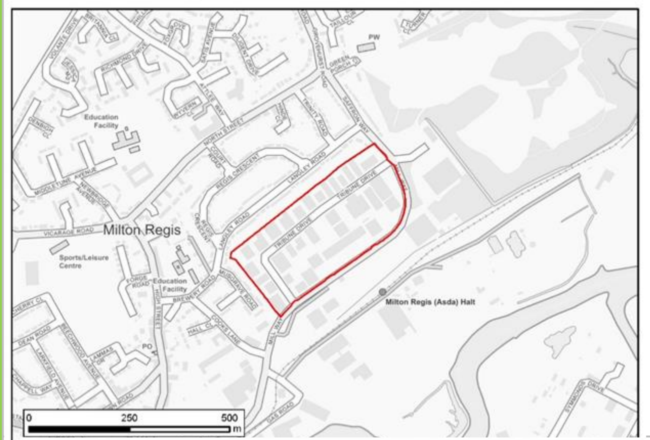
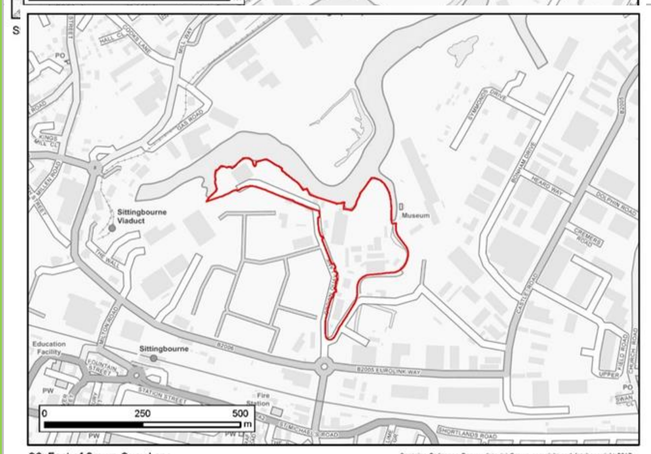
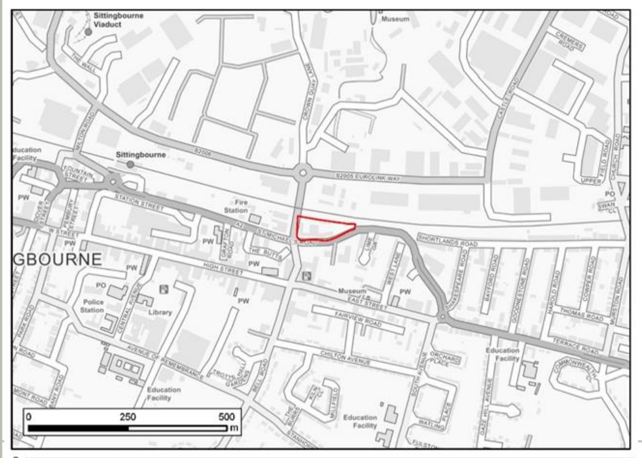
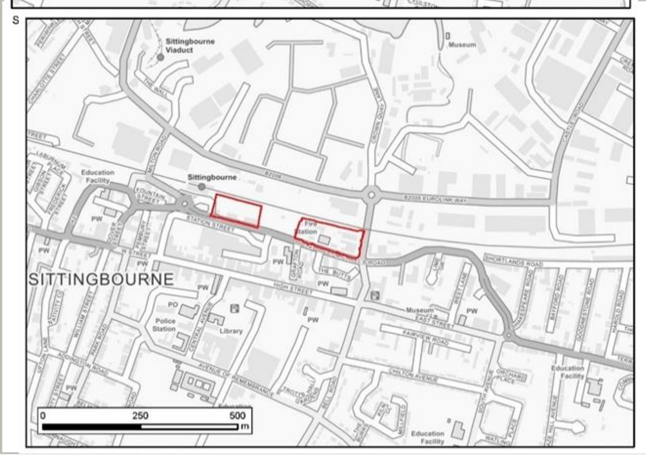
E.6 Scoring scales explanation

Criterion	Scoring scale	Explanation
Bad neighbour impact	Major, minor or none	Major: residential units/school/hospital immediately adjacent and where mitigation would be difficult/very costly. Minor: residential/school/hospital close by, but not immediate, and where any issues are likely to managed through mitigation. None: no sensitive receptors near the site.
Prominence / compatibility of surrounding uses / amenities	Excellent to very poor	Excellent: well located for local amenities (in/edge of town location), good visibility for business occupiers, similar uses nearby or location large enough to have critical mass to standalone Good: local amenities nearby but relatively limited; other similar uses nearby, visible from road network. Does not have all the attributes of an excellent location though i.e. some element of compromise. Reasonable: local amenities can be reached by public transport easily, some similar uses around but area more mixed.

Criterion	Scoring scale	Explanation
		Poor: limited visibility in commercial terms; few similar businesses in surrounding area but no sensitive neighbours. Very poor: not compatible with surrounding uses. No visibility. Poorly placed to access local amenities.
Layout, parking, servicing & landscaping	Excellent to very poor	Excellent: well-maintained and laid out. Sufficient parking. Evidence of active management. Good: Sufficient parking. Tidy and well maintained but layout could be improved to maximise site. Reasonable: Parking in high demand and can result in some on kerb parking at busy times. Tidy site but would benefit from improvement to landscaping, surfacing etc. Poor: Insufficient parking or not sufficient controls on parking results in parking on streets and kerbs. Limited landscaping and poorly laid out. Very poor: not fully surfaced or properly maintained. Litter/fly tipping. No formal parking and not enough space to meet required demand so can lead to congestion within site.
Proximity to motorway / principal A roads	Excellent to very poor	Excellent: direct access onto strategic road network or less than five minutes' drive from motorway junction Good: access not direct but well linked. Short distance on high quality local road Reasonable: longer distance on high quality local road to connect with strategic road network Poor: access to strategic road network via a number of different local roads. Not easy. Very poor: remote from strategic road network and no easy route by local roads
Suitability of site junction and local access to principal network	Excellent to very poor	Excellent: junction onto road network suitable for type of employment use on site. Potential to accommodate additional traffic if site successful/expanded. Could have controlled access if needed or direct access onto roundabout. Good: junction onto road network suitable for current use, but may require upgrade, particularly if intensity of use increased. Reasonable: no signs of congestion due to substandard access but could be improved e.g. better visibility, feeder lane, scope for queuing. Poor: access not sufficient to accommodate volume of traffic using the site – could result in congestion in or off site through queuing at busy times. Very poor: poor formed access that requires upgrade to enable use by appropriate vehicles. Detracts from perception of site.
Public transport accessibility	Excellent to very poor	Excellent: Good: where there are >15 bus stops within a 400 metre radius. Reasonable: where there are between 6-15 bus stops within a 400 metre radius. Poor: where there are <5 bus stops within a 400 metre radius.

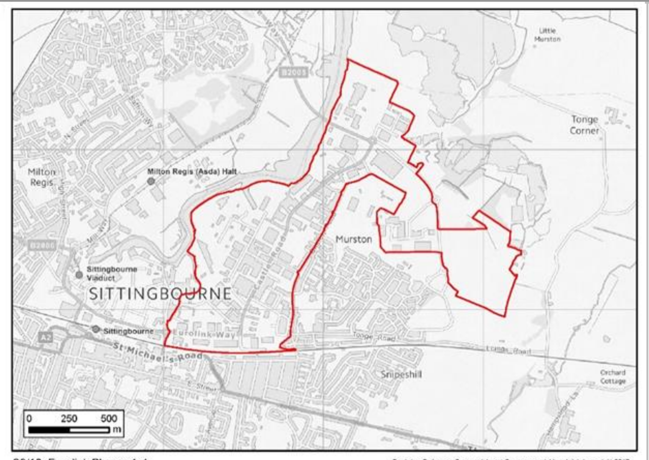
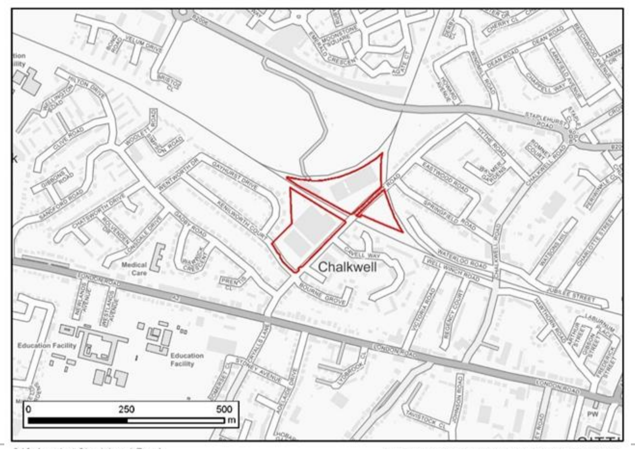
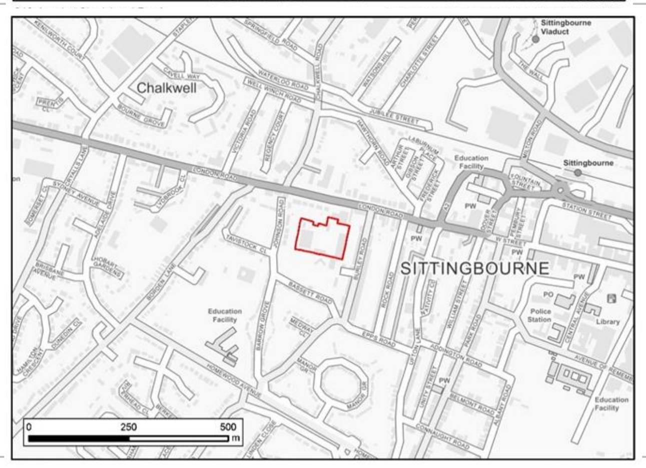
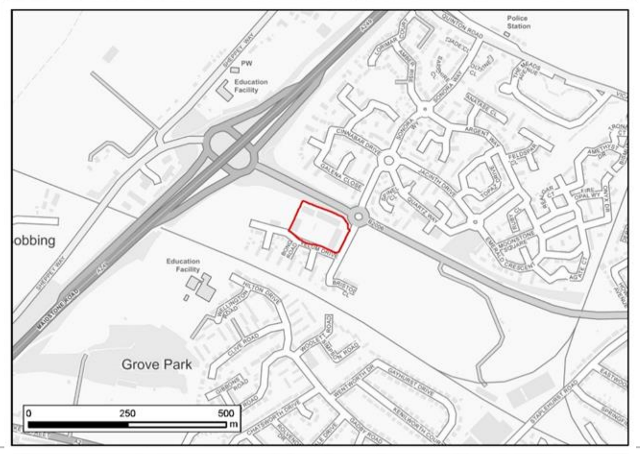
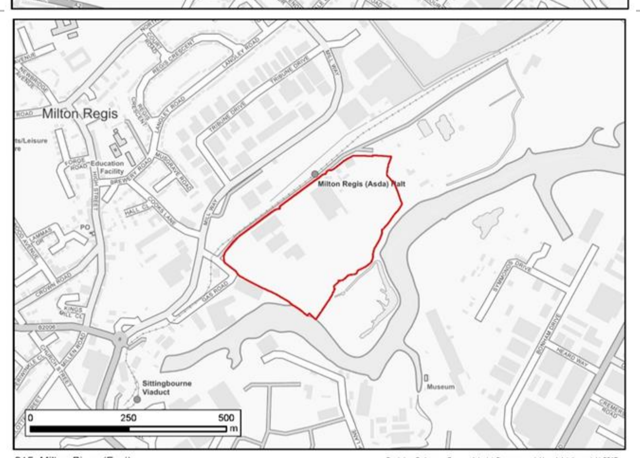
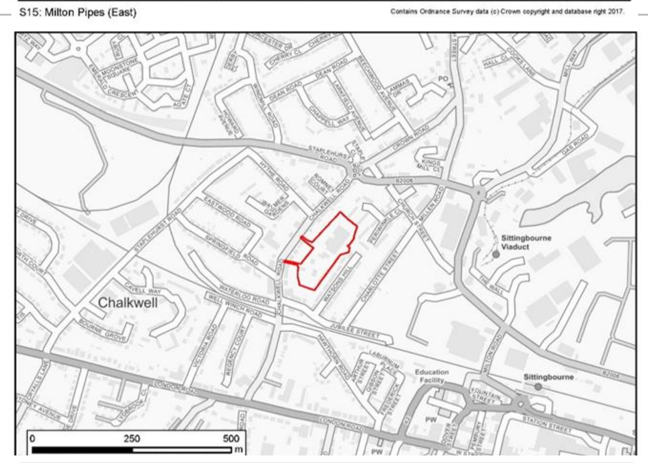
Criterion	Scoring scale	Explanation
		Very poor:
Vacancy	Nil to 100%	Nil: no vacancy Low: one or two vacant units or a limited amount of vacant floorspace. Middling: a number of vacant units / floorspace. High: the majority of units / floorspace are vacant 100%: whole site vacant
If the site retains its current use, will it be occupied?	Yes to no	Yes: well occupied and/or market signals indicate it will be in the future. Likely: occupied but some vacancies and/or market signals positive, but less certain over plan period. Some availability of stock in the local area. Hard to tell: a number of vacant units and/or market signals neutral. A number of units available in the local area. Unlikely: high vacancy and/or negative market signals. Lots of stock availability in the local area. No: developer interest as evidenced by extant permission or live application for another use.

APPENDIX F EMPLOYMENT SITES' ASSESSMENTS

1 BASIC INFORMATION Site ID.	2 Site name	3 Site location map	4 Market area	5 Site description	6 Site area (ha)	7 Primary type of employ-ment	8 Site's sequential location	9 Current relevant planning	10 CONSTRAINTS Detail any constraint(s)	11 Bad neighbour impact	12 ATTRACTIVENESS TO OCCUPIERS *External environment* Prominence of site	13 Compatibility with surrounding uses	14 Access to amenities (nearest centre km)	15 Score	16 *Internal environment* Layout, parking, servicing, landscaping etc.	17 Score	18 *Strategic accessibility (road)* Proximity to Mway/ principal roads [kms]	19 Score
S2	Land at Millen Road		Sittingbourne	Warehouse units and car sales unit to the north of Sittingbourne Retail Park and town centre. Three main occupiers: a steel products supplier, builders merchants and car sales.	1.7	Storage and Distribution (B8)	Within 400m of town centre	None	The site is in EA FZ 2/3, and redevelopment would need to reduce the risk of flooding.	None	High - on a major junction into the town centre. Frontage currently occupied by car sales.	No major issues as neighbouring uses are industrial and the surrounding road network provides a separation buffer from more distant housing.	Good - given close proximity to both the retail park and the town centre.	Good	Traditional sheds layout with plenty of staff/customer parking and space for delivery vehicles. Minimal landscaping.	Good	A249 junction 1.6 km & J5 M2 6.1km	Reasonable
S4	Land at Gas Road/ Prentis Quay		Sittingbourne	Heavy industrial area with manufacturing and material recovery operations prominent. The site is bounded by Milton Creek, the Light Railway and Milton Pipe works.	3.7	General Industrial (B2)	Within 400m of town centre	None	The site is in EA FZ 3, and redevelopment would need to reduce the risk of flooding. The site is isolated and suitable for heavier industries.	None	The site has low prominence, and heavy industrial activities are well screened by the light railway and the landscape buffer.	Neighbouring uses are compatible with heavy industry.	Reasonable, given proximity to both the retail park and the town centre.	Reasonable	A very poor quality environment that results from the heavy industrial activity with most sites and compounds surrounded by palisade fencing. Parking and servicing generally on-site and adequate.	Very Poor	A249 junction 1.9 km & J5 M2 6.4km	Reasonable
S5	Trinity Trading Estate		Sittingbourne	A purpose built trading estate to the north of Sittingbourne town centre dating from the 1970s that fronts on to a busy route into the town centre that has seen the roadside units redevelop for trade counters, and other changes such as a local college occupying a unit for training purposes.	8.9	General Industrial (B2)	Within the built up area	None	Residential to the north and west. The site is in EA FZ3, and redevelopment would need to reduce the risk of flooding.	Minor	High prominence on a popular route into the town centre.	Generally good as although the estate backs on to residential on two sides it is largely self contained.	Foodstore immediately adjacent, but Retail Park and town centre 1 km distant.	Reasonable	Mostly adequate, but insufficient on-site parking leads to a lot of roadside parking which will impact on access for the large vehicles.	Reasonable	J on A249 2.5km & J5 M2 7.0km	Poor
S6	East of Crown Quay lane		Sittingbourne	Bounded by Milton Creek and with large areas of open storage, buffering the heavier industrial uses to the east. The existing uses are dominated by building material providers, but adjacent sites are coming forward for residential.	6.4	Light Industrial (B1c)	Within 400m of town centre	This site is part of the wider area allocated for residential / open space under Policy A9 (Land at Crown Quay Lane), benefitting as it does from the Milton Creek frontage and proximiy to the town centre.	The site's allocation for non-B class uses is the major constraint. It is also within EA FZ3..	None	Low, because it backs on to Milton Creek.	The site's current low intensity consumer facing/open storage uses provide a buffer between the cement works to the rear of the site, the scrap yard and Europark to the east, and the new residential to the west.	In town centre 400 m.	Good	Poor quality environment because of conditions associated with the cement works. Plenty of parking and servicing space at the building materials and the timber yard.	Poor	J on A249 3km & J5 M2 7.5km	Poor
S7	Former Seeboard yard and offices, St Michael's Road		Sittingbourne	Office building with D2 leisure and retail bounded by the railway and the A2.	0.6	Office (B1a)	In a town centre	None	The site is part within EA FZ3, and redevelopment would need to reduce the risk of flooding.	None	High, at a busy junction on the A2.	Good, neighbouring retail and residential.	Short walk to main part of town centre.	Good	The building fronts the site boundary with parking and servicing areas to the rear, which given the town centre location look sufficient.	Good	J on A249 (with A2) 3km & J5 M2 7.1km	Poor
S8	Land around Sittingbourne Station		Sittingbourne	Car repair and B2 use site under construction adjacent to railway station, separated from fire and ambulance station by a car showroom.	1.8	Other	In a town centre	Recent gain of 134sqm of B2 floorspace.	None	None	High, on the A2 next to the station.	Good, no incompatible uses.	Short walk to main part of town centre.	Good	The buildings front the A2 with parking to the rear. Constrained site, so little landscaping.	Reasonable	J on A249 (via A2) 2.9km & J5 M2 7.0km	Poor

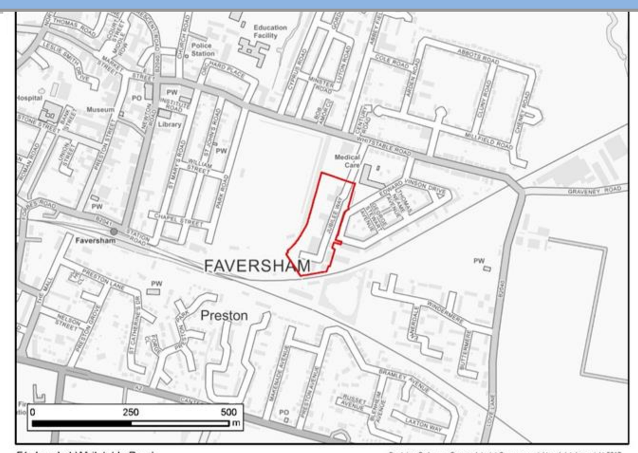
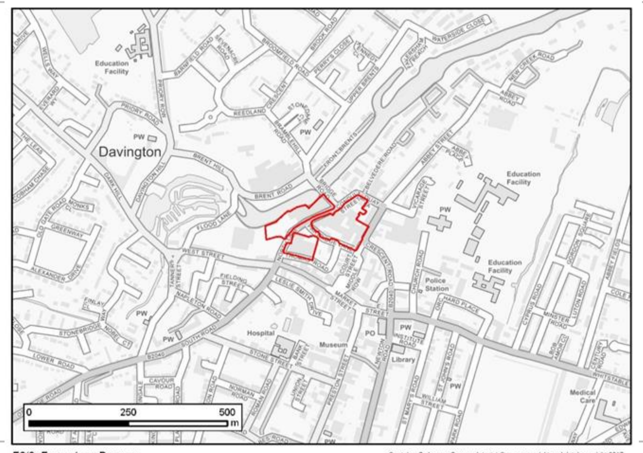
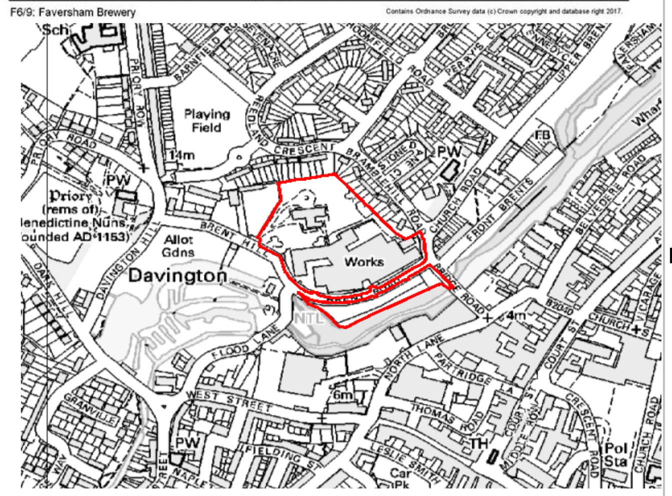
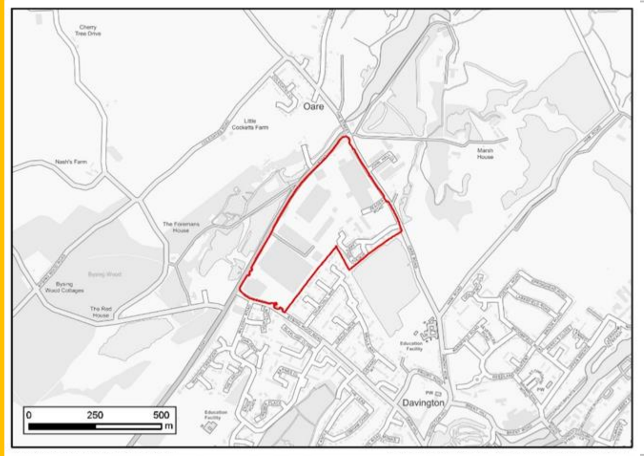
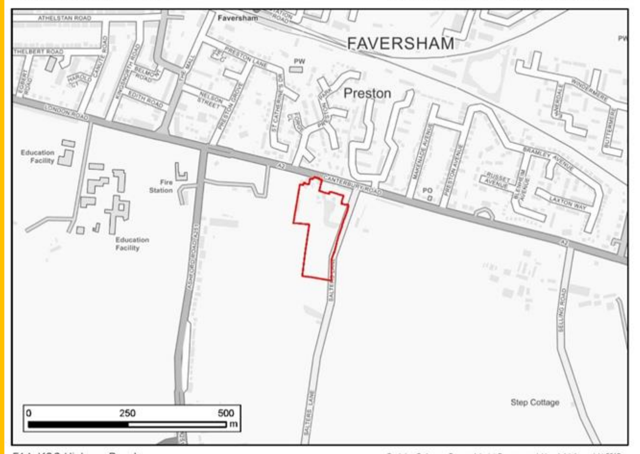
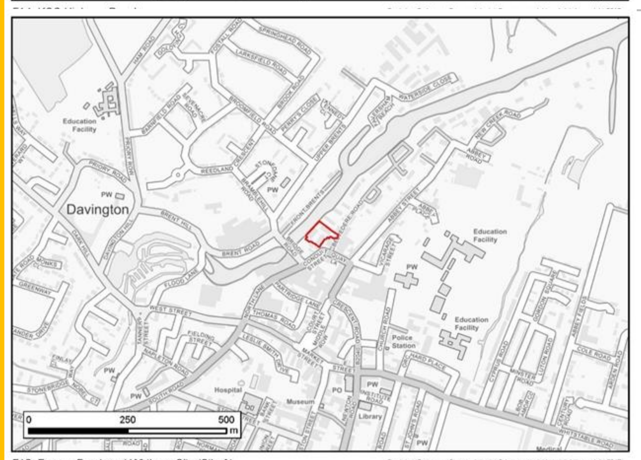
1	2	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34
BASIC INFORMATION		*Local access by road*		*Public transport access*							REVIEW / RECOMMENDATION					
Site ID.	Site name	Site junction and quality of access to the principal road network	Score	Is the site close to a railway station (within 400m)?	Station name, number of bus stops within a 400 m radius	Score	Vacancy	Vacancy Score	Other market intelligence e.g. market history, competing supply nearby, occupiers known to be moving in/out,	Score	If the site retains its current use, will it be occupied?	Are there opportunities for redevelopment / intensification / extension?	Developable land (ha)	Are there any constraints on redevelopment / intensification / extension?	When are these constraint(s) likely to be resolved?	Recommend-ation
S2	Land at Millen Road	Site access is off Millen Road, which is likely to be tight for larger vehicles. The B2006 that links with the A249 passes through a residential area.	Reasonable	No	36	Excellent	None	Nil	Warehouse units slightly dated, but appear to be well occupied. Units are small which is attractive to local occupiers. Units are likely to be re-occupied if current occupier were to relocate.	Good	Yes	The site frontage, currently occupied by the car showroom could be a redevelopment possibility, but is a small site.	n/a	No	N/A	Safeguard
S4	Land at Gas Road/ Prentis Quay	Site has three access points on to the B2005, which is adequate for large vehicles, but the route to A249 passes through a residential area.	Reasonable	No	21	Good	None	Nil	Units are well occupied. Some of the units are bespoke and some are quite dated. These units may have longer voids if occupiers leave, compared to more desirable locations in Sittingbourne. If existing units cannot be re-used, the site will be suitable for redevelopment and will remain attractive to B2/B8 occupiers.	Good	Yes	The site and its surroundings lends itself to the dirtier industrial activity, and is therefore a good site if these activities need to continue to be located in the town. The built form is densely developed, so little opportunity to expand the industrial floorspace.	n/a	The Light Railway may constrain redevelopment on the northern side.	N/A	Safeguard
S5	Trinity Trading Estate	The site has good access onto the B2005, and this route is adequate for large vehicles. The route on the B2006 to A249 passes through a residential area.	Reasonable	No	24	Good	Low vacancy. Available units are generally small.	Low	Second largest industrial estate in Sittingbourne. The estate has seen multiple phases of development and is the favourable location for trade counter and manufacturing sectors. The units are generally more affordable than Eurolink. The estate, though in some areas dated, is generally in reasonable condition and should be occupied throughout the plan period.	Good	Yes	There has been considerable recycling of units within the site in recent years, especially to trade counters, but also for industrial units where higher eve heights have been a feature of the new units.	n/a	None	N/A	Safeguard
S6	East of Crown Quay lane	The site has good access onto the B2005, and this route is adequate for large vehicles. The route on the B2006 to A249 passes through a residential area.	Reasonable	No	6	Poor	None	Nil	Stock is dated, and in some cases is in poor condition, coming to the end of its economic life.	Reasonable	No	Whilst the site could have been used to buffer the heavier industrial uses from new residential uses, its new Plan allocation removes the site from B class use.	n/a	Yes, the Local Plan residential/ open space allocation.	N/A	Allow managed release
S7	Former Seeboard yard and offices, St Michael's Road	Principle road access is less critical for an office use, and the A2 route to the A249 passes through the town centre and residential areas.	Reasonable	Yes	45	Excellent	Small allocation, a number of smaller sized units available	Middling	There have been vacant office units within this allocation for a number of years. The stock is dated, but rents are affordable. The location is attractive to occupiers, but the units would benefit from refurbishment within the plan period. But this would only be an option if there is enough demand and development is viable.	Reasonable	Hard to tell	Given the location's proximity to the railway station and the town centre this would be a good site for redevelopment should development be viable.	n/a	None other than some floodrisk.	Available in the Plan period	Safeguard
S8	Land around Sittingbourne Station	The A2 route to the A249 passes through the town centre and residential areas.	Reasonable	Yes	51	Excellent	None	Nil	Units are of reasonable quality and are currently occupied by the fire and ambulance service providing strong covenant. There is vacancy in the office allocation (S7) across the road which indicates that there may be limited demand from office occupiers in this area.	Good	Yes	Yes, some redevelopment has taken place, and should the fire/ambulance stations relocate then opportunity for redevelopment to office should this be viable.	n/a	None	N/A	Safeguard

EXISTING SITES

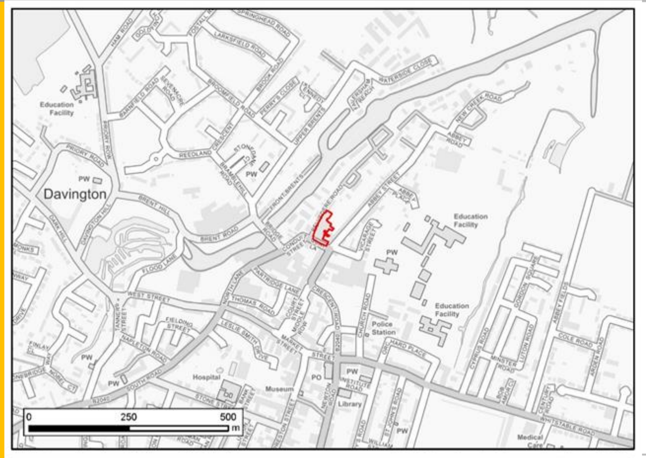
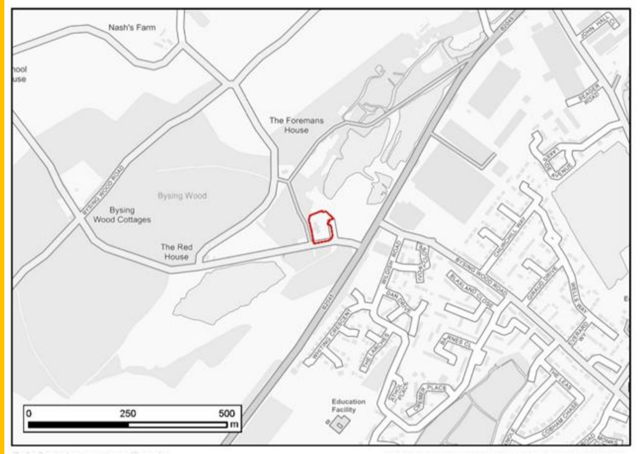
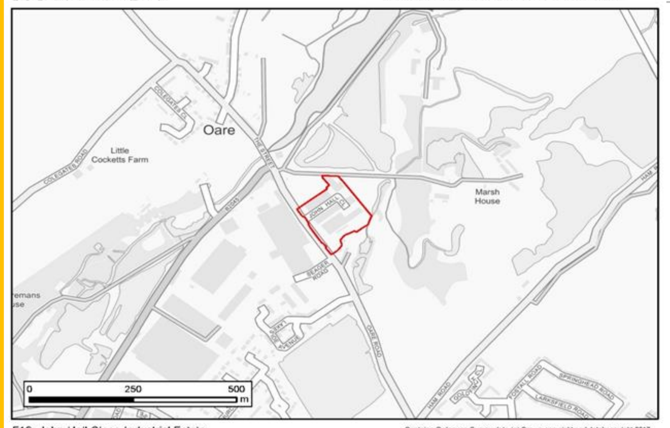
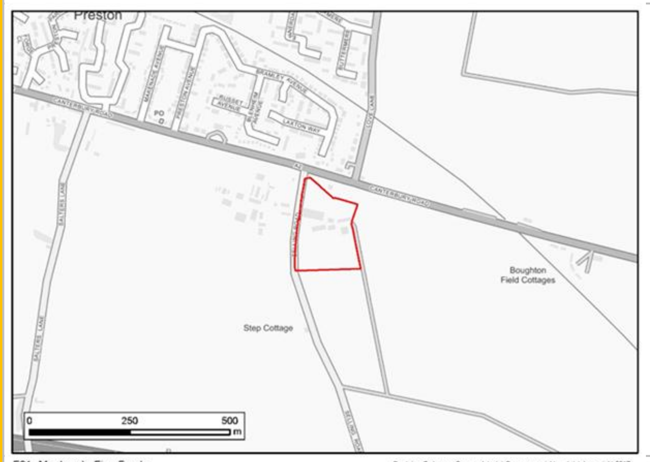
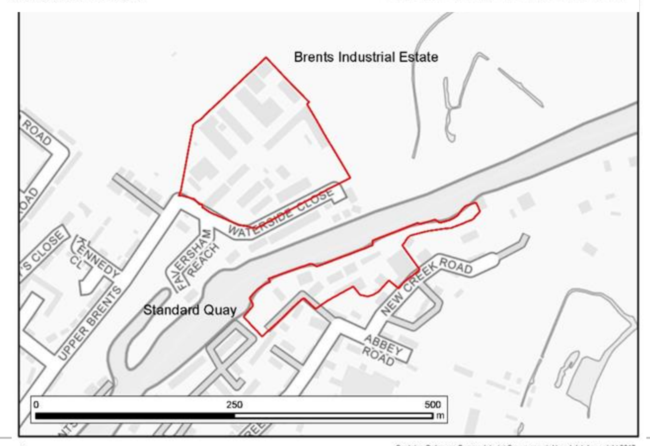
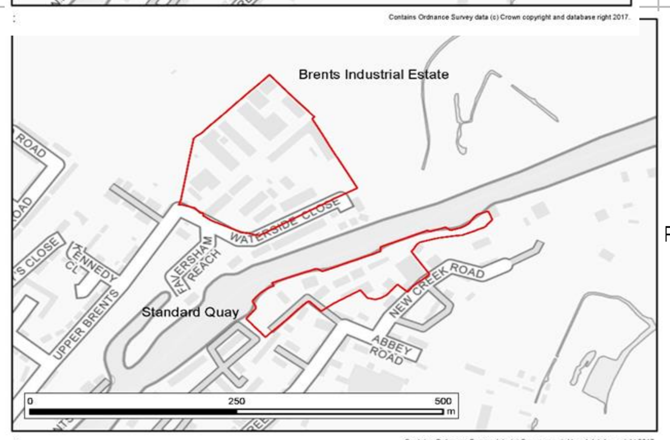
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19
BASIC INFORMATION									**CONSTRAINTS**		**ATTRACTIVENESS TO OCCUPIERS**							
											External environment				***Internal environment***		***Strategic accessibility (road)***	
Site ID.	**Site name**	**Site location map**	**Market area**	**Site description**	**Site area (ha)**	**Primary type of employ-ment**	**Site's sequential location**	**Current relevant planning**	**Detail any constraint(s)**	**Bad neighbour impact**	**Prominence of site**	**Compatibility with surrounding uses**	**Access to amenities (nearest centre km)**	**Score**	**Layout, parking, servicing, landscaping etc.**	**Score**	**Proximity to Mway/ principal roads [kms]**	**Score**
S9/10	Eurolink Phases 1-4	 S9/10: Eurolink Phases 1-4	Sittingbourne	Sittingbourne's largest industrial estate providing a range of premises and activities focused on the Eurolink and Castle Rd spine roads. Activity ranges from the long established heavy industrial activity (concrete and material recovery) in open yards adjacent to Milton Creek, to the new high tech engineering buildings off Swale Way, with everything in-between also in evidence. Buildings from earlier phases of the Estate (which commenced in the 1970s) have and continue to be redeveloped to accommodate modern requirements. Swale Way which links to the A249 has improved access and the Estate's potential significantly. Phase 4 is currently completing with just two plots remaining.	146.8	General Industrial (B2)	Within the built up area	The site has been developed in a number of phases since the 1970s. The completion of Swale Way that provides a direct link to the A249 has been the catalyst for an acceleration of activity with Phases 4, and now 5 adding very large units to the Eurolink stock (see allocations sheet for assessment of Phase 5).	None	None	High, due to scale and compact nature.	Good, the boundaries are generally Milton Creek, the railway and distributor roads. Some residential on the eastern side.	Generally poor - limited on-site provision. Town centre 1.5 kms from the middle of the Estate.	Reasonable	Generally the layout is good with the tree lined avenue Eurolink Way presenting an attractive entrance from the town centre side. All the newer areas have allowed more room for landscaping which improves the setting of the buildings. No evidence of parking or servicing issues.	Good	J on A249 (via Swale Way) 3.5km & J5 M2 10.5km. A longer distance than via the A2, but a better quality / appropriate route.	Good
S12	Land at Staplehurst Road		Sittingbourne	Three land parcels either side of the railway surrounded by residential. The triangular site to the north of the railway has planning permission for 18 dwellings. Current planning application for 52 dwellings for the northern parcel. South of the railway and east of Stapleford Road there are light industrial units that could be included in the cluster along with the designated light industrial on the western side of Stapleford Road. The 3.9ha site area includes the two northern parcels.	3.9	Light Industrial (B1c)	Within the built up area	Eastern triangular parcel is a loss of 4800 sq m. Northern parcel if permitted would result in the loss of 42,740 sq m.	Predominantly residential area. Stapleford Road residential in nature.	Minor	Poor - Stapleford Road is not a main route and is largely residential.	Backing on to the railway, but has neighbouring residential.	Some facilities on the A2, but the town centre is 1.5kms.	Poor	The buildings respect the context, and are not dominant. Parking and servicing is off-site and appears adequate. The southern parcel lacks a landscaped screen, but the buildings are not dominant.	Reasonable	J on A249 (via A2) 1.5km & J5 M2 5.0km	Reasonable
S13	London Road Trading Estate		Sittingbourne	A small industrial estate located just off the A2.	1.0	Light Industrial (B1c)	Within 400m of town centre	None	Surrounding residential.	Minor	Low - site is hidden behind an office building fronting the A2.	Residential in close proximity.	Good - the town centre is close by.	Reasonable	Small units arranged around a large central courtyard used for parking and servicing. No landscaping.	Reasonable	J on A249 (via A2) 2km & J5 M2 5.5km	Reasonable
S14	Watermark Business Park		Sittingbourne	Out of centre office development close to the A249/B2006 junction.	1.2	Office (B1a)	Within the built up area	Built in 2008, and was to be a larger office scheme, but remainder of the site (50%) developed for housing instead.	None	None	Middling, on a junction close to the A259, but the route is not major and is mainly a residential area.	Good. Residential neighbouring.	Poor - nothing close by, and the town centre is 2kms.	Poor	Four pavilion office buildings built around a central courtyard used for parking/servicing. Whilst the office units are not full the parking area appears close to capacity.	Reasonable	J on A249 (via A2006) 0.5km & J5 M2 5.0km	Good
S15	Milton Pipes (East)	 S15: Milton Pipes (East)	Sittingbourne	A heavy industrial site, occupied by a pipework manufacturer, metals fabricator and a large car breakers yard. Site bounded by the Light Railway and Milton Creek, and to the northeast by the sewage works and waste recycling centre.	10.2	General Industrial (B2)	Within the built up area	The southern part of the site has permission for a recycling centre from open B8 storage use.	The site is within EA FZ3, otherwise none. The site is isolated and buffered by other industrial uses. These types of uses can generate serious bad neighbour issues.	None	Low. Site is isolated from other areas by the Light railway and Milton Creek.	Good, as these are other forms of heavy and light industry.	Reasonable - Retail Park is 0.8kms, and the town centre 1.2kms.	Reasonable	The site is self-contained in terms of parking and servicing, but internal environment is very poor because of the dirt associated with the industrial processes. The surrounding palisade fencing adds to the unattraction.	Very Poor	J on A249 2.2 km & J5 M2 6.4km	Good
S16	Bennett Opie		Sittingbourne	Single operator food manufacturer occupying backland site behind residential streets north of the town centre.	1.4	General Industrial (B2)	Within the built up area	None	Surrounding residential.	Major	Very low. Site hidden behind residential.	Potential for conflict.	Reasonable - town centre 0.8 kms.	Poor	A self-contained site, with all parking and servicing on-site.	Good	J on A249 1.6 km & J5 M2 6.1km	Reasonable

1	2	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34
BASIC INFORMATION		*Local access by road*		*Public transport access*							REVIEW / RECOMMENDATION					
Site ID.	Site name	Site junction and quality of access to the principal road network	Score	Is the site close to a railway station (within 400m)?	Station name, number of bus stops within a 400 m radius	Score	Vacancy	Vacancy Score	Other market intelligence e.g. market history, competing supply nearby, occupiers known to be moving in/out,	Score	If the site retains its current use, will it be occupied?	Are there opportunities for redevelopment / intensification / extension?	Developable land (ha)	Are there any constraints on redevelopment / intensification / extension?	When are these constraint(s) likely to be resolved?	Recommend-ation
S9/10	Eurolink Phases 1-4	Swale Way is a purpose built route suitable for heavy goods vehicles.	Good	No	3	Poor	Generally low. Available units vary in size, with the majority small under 2,000 sqft.	Low	Eurolink is the largest industrial area in Swale Borough providing some of the best quality stock in the town. There are a mix of unit types within the estate, with some new smaller units recently being delivered at Precision Business Park. There is strong demand for space and rents and capital values have risen, especially in the newest phases - in some estates by c. £2 psf in the past 2 years. Eurolink phase 5, is planned and will be attractive to occupiers in the future. This may help satisfy demand in the short-term.	Excellent	Yes	The 26 ha Phase 4 is completing with new light industrial. There are just two sites remaining - south of Bingham Rd - 1.4 ha & north of Swale Way - 1.3 ha.	2.7	None	N/A	Safeguard
S12	Land at Staplehurst Road	Access on to Stapleford Road is tight for large vehicles, but the short link to the A249 via the A2 is good.	Reasonable	No	30	Good	The eastern triangular site is cleared and no longer in industrial use. The remaining units are fully occupied.	Nil	Buildings are of reasonable quality. There is limited vacancy in the immediate area and there is a good level of demand for light industrial units. These units likely will be re-occupied should the current occupier re-locate.	Reasonable	Yes	No. The triangular site (1.5ha) has been lost to residential.	-1.5	Yes, the neighbouring residential and the suitability of Stapleford Road for large vehicles. Given the constraints if the site became vacant it would be unlikely to get redeveloped for industrial uses, and could be released.	Not in the Plan period	Safeguard
S13	London Road Trading Estate	Access on to the A2 is through an arch under the office building, which could be difficult for large vehicles, but the servicing generally is by small vehicles. The short link to the A249 via the A2 is good.	Reasonable	No	21	Reasonable	None	Nil	The units are well occupied and in a good location. Likely to be reoccupied if units are vacated by current occupiers.	Reasonable	Yes	Only renewal of what is there.	n/a	The access restriction and neighbouring residential.	Not in the Plan period	Safeguard
S14	Watermark Business Park	Excellent access via Vellum Drive to the B2006 for the short link to the A249.	Excellent	No	15	Reasonable	A number of medium sized units available	Middling	One of few office parks in the Borough. Units good quality, popular and are attractive to a wide range of local occupiers.	Good	Yes	No	n/a	No	N/A	Safeguard
S15	Milton Pipes (East)	Site access points onto the B2005 via Gas Road, which is adequate for large vehicles. Route to A249 passes through a residential area.	Reasonable	No	6	Reasonable	N/A	Nil	Large yard space and units types- specification suits heavier industry. Limited competition from other areas, as vacancy is generally low in Sittingbourne and there are few estates focused on heavier industry.	Reasonable	Yes	Whilst the site could be redeveloped for other forms of industry, its isolation makes it a good site for heavy industrial uses, especially those requiring outdoor activity & storage.	n/a	No	N/A	Safeguard
S16	Bennett Opie	Site access is off Chalkwell Road, which is residential and tight for larger vehicles. The B2006 that links Chalkwell Road with the A249 passes through a residential area.	Poor	No	33	Good	N/A	Nil	The quality of the units are reasonable but the buildings are bespoke, so it may be difficult to find occupiers if the current occupier vacates. The site is surrounded by residential which may deter some industrial uses.	Reasonable	Hard to tell	None that would lead to an intensification in activity because of the surrounding residential. If the occupier were to leave it is likely the site would not attract an alternative industrial firm.	n/a	Yes, the residential	Not in the Plan period	Safeguard

EXISTING SITES

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19
BASIC INFORMATION									CONSTRAINTS		ATTRACTIVENESS TO OCCUPIERS							
											External environment				*Internal environment*		*Strategic accessibility (road)*	
Site ID.	**Site name**	**Site location map**	**Market area**	**Site description**	**Site area (ha)**	**Primary type of employ-ment**	**Site's sequential location**	**Current relevant planning**	**Detail any constraint(s)**	**Bad neighbour impact**	**Prominence of site**	**Compatibility with surrounding uses**	**Access to amenities (nearest centre km)**	**Score**	**Layout, parking, servicing, landscaping etc.**	**Score**	**Proximity to Mway/ principal roads [kms]**	**Score**
F1	Land at Whitstable Road Eurocentre, Jubilee Way	 F1: Land at Whitstable Road	Faversham	Good quality purpose built office / light indl units to the southeast of the town centre. Some trade counter and other units occupied by children's nursery and vet surgery.	2.3	Light Industrial (B1c)	Within the built up area	None	Residential on land to the east, built at the same time as Eurocentre, is a sensitive use. Planning permission for Eurocentre restricts hours of business and land use to avoid bad neighbour impact.	None	Poor. No road frontage or visibility.	Current activity is clean industrial and office uses that are compatible with the neighbouring residential to the east, on the western side is the Faversham Recreation Ground which does not present non-compatibility issues.	Town centre 700m	Reasonable	Narrow linear site with dedicated and shared parking areas that are at capacity. Not much room for servicing by large vehicles, but the more industrial units have loading bays. Site backs on to recreation ground.	Reasonable	J6 M2 3.3kms	Good
F6/9	Faversham Brewery	 F6/9: Faversham Brewery	Faversham	Historic Shepherd Neame Brewery site centred on North Lane and backing on to the Creek, but taking in three land parcels (the main brewing site, with bottling plant on the Creekside and a block of production and other buildings south of Partridge Lane.	2.2	General Industrial (B2)	In a town centre	None	Historic buildings, flood risk (FZ3 applies) and the nearby residential are the key constraints.	Minor	The site is a prominent town centre location.	Lots of neighbouring town centre uses, but also a lot of residential that generates conflict with industrial processes.	Good - within town centre.	Good	A constrained site, with a high density of building to site area due to historic reasons. Servicing via Partridge Lane is tight, but maintained on site.	Reasonable	J6 M2 2.5kms (via B2040/41 and Canterbury Road).	Reasonable
F7/8	BMM Weston		Faversham	Site operated solely by BMM Weston, a life sciences company that has designed and manufactured from the Brent Road premises, located just to the north west of the town centre, for many years. The site comprises of three separate parts - the car park on the Creek side of the Brent Road (previously a coal yard), the factory buildings with vehicle access via Brent Road, and the converted Victorian house to offices with access from Brent Hill.	3.1 ha (net of Ordnance Wharf)	General Industrial (B2)	Within 400m of town centre	Site is within a 'built up area boundary' (ST3) and allocated for mixed use in the Faversham Creek Neighbourhood Plan (including employment on the existing factory site and housing to the south and on the converted Victorian house site). No relevant planning permissions or applications.	Flood risk (FZ3 applies) to the Creek side area, access on Brent Road and the nearby residential are the key constraints.	Minor	Low - this site is away from industrial areas, and not on a route to a principle highway.	Residential 'arcs' around the northern side of the site, whilst the current industrial activity is on the whole clean, compatibility with residential would be a major issue for any future employment redevelopment.	Town centre 0.4kms.	Good	Building density is comparatively low, with parking provided on the south side of Brent Road where floodrisk is a factor and landscaped grounds surrounding the office. Servicing is undertaken through a central service bay. Landscaping is minimal.	Reasonable	J6 M2 2.7kms (via B2040/41 and Canterbury Road).	Good
F13	Oare Road Industrial Estate		Faversham	Home to some very large distributors - Gist that distributes for M&S, East Kent Storage that distributes fruit and Shepherd Neame that benefit from the Western Link road. It also includes the Foundry Business Park on Seager Rd, built around 10 years ago, and providing office/light industrial workshops in a high quality environment.	18.2	Storage and Distribution (B8)	Within the built up area	None	Flood risk (FZ3 applies) to the area closest to Oare Creek, otherwise no constraints.	None	High from the Western Link Road.	Employment area to the north, link road to the west, superstore to the south, but residential to the east.	Superstore 0.5kms and town centre 1.8kms.	Reasonable	Purpose built with good layout and landscape screening from the Link road, and all parking and servicing in dedicated areas (both warehouses and light industrial area).	Excellent	J6 M2 4.7kms (via Western Link, London Road & A251).	Good
F14	KCC Highway Depot		Faversham	Irregular shaped highways depot site used for open storage, located to the south of the town centre and the A2.	2.2	Storage and Distribution (B8)	Adjacent to the built up area	None	Site is not adjacent to any other employment activity, and would require upgraded junction to the A2. It is adjacent to a residential area.	Minor	Middling - whilst it has frontage on to the A2, most of the long narrow site is to the rear.	Neighbouring residential could be an issue.	Town centre 1.5kms.	Reasonable	Open storage with ample on-site space for parking and servicing.	Good	J6 M2 1.2kms (via Canterbury Road & A251).	Excellent
F16	Former Frank and Whitome Site (Site A)		Faversham	Historic industrial building adjacent to Faversham Creek. Currently vacant.	0.3	Other	Within 400m of town centre	Allocated for employment use in the Faversham Creek Neighbourhood Plan	Major - access, neighbouring residential and hotel/leisure uses, plus flood risk and the financial viability of revamping the historic premises including a Grade II listed building (Faversham Chandlery) to make it fit for modern needs.	Minor	Low - away from the main industrial or office areas and not on a busy route.	Activity needs to be compatible with neighbouring residential and hotel/restaurant leisure uses. Suitable for creative/craft activity in flexible B1 premises.	Town centre 400m	Reasonable	Belvedere Road is a densely developed area with buildings fronting the highway. Parking and servicing are therefore difficult, and there is little in the way of landscaping.	Poor	J6 M2 2.7kms (via B2040/41 and Canterbury Road).	Reasonable

1	2	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34
BASIC INFORMATION		*Local access by road*		*Public transport access*							**REVIEW / RECOMMENDATION**					
Site ID.	**Site name**	**Site junction and quality of access to the principal road network**	**Score**	**Is the site close to a railway station (within 400m)?**	**Station name, number of bus stops within a 400 m radius**	**Score**	**Vacancy**	**Vacancy Score**	**Other market intelligence e.g. market history, competing supply nearby, occupiers known to be moving in/out,**	**Score**	**If the site retains its current use, will it be occupied?**	**Are there opportunities for redevelopment / intensification / extension?**	**Developable land (ha)**	**Are there any constraints on redevelopment / intensification / extension?**	**When are these constraint(s) likely to be resolved?**	**Recommend-ation**
F1	Land at Whitstable Road Eurocentre, Jubilee Way	The route to the M2 (Whitstable Rd, Love Lane, Canterbury Rd and A251) is narrow in places, especially the Whitstable Rd Railway Bridge, and Love Lane in particular is not suited to large vehicles.	Poor	No	12	Reasonable	None	Nil	Popular estate with both light industrial and office occupiers. This estate is the best example of small industrial units close to Faversham town centre, there is little competing supply near by.	Excellent	Yes	Yes - potential for redevelopment of a 0.3 ha parcel of existing employment land immediately to south west of Europark, adjacent to the railway/footbridge, but not accessible from Jubilee Way. Access is via Station Road. The existing buildings are older poorer quality units, but due to scale little scope for net additional employment floorspace.	0.3	At Europark - yes the conditioned working hours. Due to its relative remoteness from the residential, the conditioned working hours may not apply to the Station Rd site that has redevelopment potential.	Available in the Plan period	Safeguard
F6/9	Faversham Brewery	The site's town central location makes access unsuitable for large vehicles.	Poor	No	30	Good	N/A	Nil	The brewery building is very bespoke. If the brewery vacates it would have to be redeveloped if it is to be retained in employment use. But general site access via the B2040 is not ideal for HGVs with better sites available.	Reasonable	Yes	The access limitations constrain the opportunities for expansion of the Brewery. Were the Brewery to consider changes in the future, any plans would be likely to favour a mix of uses, and would need to consider the wider regeneration plans in the historic core.	n/a	Historic environment, flood risk and neighbouring residential.	Not in the Plan period	Safeguard
F7/8	BMM Weston	Access to/from Brent Road is tight for large vehicles and is via Creek Bridge and access to the principle road is via the B2040/41 which is through the middle of Faversham. This route is unsuitable for large vehicles.	Poor	No	33	Good	N/A	Nil	Single occupier has been in situ for a number of years. Buildings are a mix of ages, but appear well maintained. Site access is poor and will detract from the attraction to potential new occupier(s). If the current occupier vacates, it is unlikely that a single new occupier would be found.	Poor	Yes	The site's poor accessibility and location in a predominantly residential area indicate that were the long term occupier to move, the site would not remain wholly in employment use. A mixed use scheme with employment not requiring large vehicle access would be suitable in this location close to the town centre.	n/a	Yes, flood risk, access and neighbouring residential.	Not in the Plan period	Allow managed release
F13	Oare Road Industrial Estate	The Western Link, London Rd (A2) and A251 provide a good link avoiding the town centre link with the M2, albeit the Ospringe junction on the A2 is pinch point, and traffic passing through the village generates air quality issues.	Good	No	15	Reasonable	None	Nil	The estate has a mix of unit types, with some new units at the Foundry. The Foundry has been popular with light industrial occupiers. The older units are larger and occupied by logistics firms. The location is reasonable and units would likely be re-occupied if current occupiers vacate.	Good	Yes	No	n/a	No	N/A	Safeguard
F14	KCC Highway Depot	Vehicles currently access the site on the A2, but more and potentially larger vehicles would require better access arrangements. The route to the M2 is excellent.	Good	No	12	Reasonable	None	Nil	Currently being used as a storage depot. The site would have limed scope for other uses without redevelopment.	Reasonable	Likely	Yes, the site has an advantageous location close to J6 M2, and although modest in scale and not neighbouring other employment areas, could accommodate industrial units. However, its potential redevelopment offers no net gain in employment land.	n/a	Yes, improved access arrangements and neighbouring residential.	Available in the Plan period	Safeguard
F16	Former Frank and Whitome Site (Site A)	The route to the M2 through the historic town centre (South Lane, Canterbury Rd and A251) is not suitable for large vehicles.	Poor	No	24	Good	Yes	100%	The units are historic and do not provide space to a modern specification, but attractive to creative activity.	Reasonable	Hard to tell	The buildings are listed, and therefore no scope for major redevelopment. Buildings allocated and likely to stay in employment use.	n/a	Yes, poor access, neighbouring residential/hotel/leisure uses, the need to revamp the premises, historic building and flood risk.	Available in the Plan period	Safeguard

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19
BASIC INFORMATION									CONSTRAINTS		ATTRACTIVENESS TO OCCUPIERS							
											External environment				*Internal environment*		*Strategic accessibility (road)*	
Site ID.	**Site name**	**Site location map**	**Market area**	**Site description**	**Site area (ha)**	**Primary type of employ-ment**	**Site's sequential location**	**Current relevant planning**	**Detail any constraint(s)**	**Bad neighbour impact**	**Prominence of site**	**Compatibility with surrounding uses**	**Access to amenities (nearest centre km)**	**Score**	**Layout, parking, servicing, landscaping etc.**	**Score**	**Proximity to Mway/ principal roads [kms]**	**Score**
F17	Former Frank and Whitome Site (Site B)		Faversham	Historic industrial building adjacent to Faversham Creek.	0.2	Other	Within 400m of town centre	The Faversham Creek Neighbourhood Plan suggests redevelopment including a mixture of B1, workshops and residential.	Major - access, neighbouring residential and hotel/leisure uses, plus flood risk and the financial viability of revamping the historic premises to make it fit for modern needs. Although none of the buildings are listed, the site is surrounded by Grade II listed buildings.	Minor	Low - away from the main industrial or office areas and not on a busy route.	Activity needs to be compatible with neighbouring residential and hotel/restaurant leisure uses. Suitable for creative/craft activity in flexible B1 premises.	Town centre 400m	Reasonable	Belvedere Road is a densely developed area with buildings fronting the highway. Parking and servicing are therefore difficult, and there is little in the way of landscaping.	Poor	J6 M2 2.7kms (via B2040/41 and Canterbury Road).	Reasonable
F18	Brett Aggregates office site		Faversham	Brett Aggregates office building, located in open countryside on the western side of the Western Link.	0.4	Office (B1a)	Outside the built up area	None	Major - The site is within a local designated site of biodiversity and an area of high landscape value	None	Low - located in the countryside.	Low - although there is an old workshop close by occupied by a motor repairs, the area is predominantly open countryside.	Foodstore 0.3kms, and town centre 1.7kms.	Poor	Plenty of space for parking and servicing in a countryside setting.	Good	J6 M2 4kms (via Western Link, London Road and A251).	Reasonable
F19	John Hall Close Industrial Estate	 F19: John Hall Close Industrial Estate	Faversham	Small established industrial estate to the north of Oare Road. Occupied by haulage, distribution and more local activity such as car repairs.	1.9	Mixed B uses	Within the built up area	None	Most of the site is in EA FZ3.	None	Middling - on the edge of town, but opposite the town's main distributors.	Good - distribution to the south and gravel extraction to the north	Foodstore (J Sainsbury) 1.0km, and town centre 1.7kms.	Reasonable	Wide roadway with dedicated parking & servicing outside each unit. Landscaping at entrance, but not in the site.	Reasonable	J6 M2 4.8kms (via Western Link, London Road & A251).	Good
F21	Macknade Fine Foods	 F21: Macknade Fine Foods	Faversham	Collection of former agricultural buildings backing on to open countryside now used for retail/leisure purposes - country foodstores and restaurant, to the south of the A2 and the town centre.	2.8	Other	Adjacent to the built up area	Application currently undetermined for the refurbishment and expansion of the existing uses, with increases of 464sqm B1a, 463sqm B2, and 450sqm B8.	No landscape designations specifically on the area. But the area is outside of the built-up area boundary and backs onto open countryside and is not far from the Kent Level AHLV, and therefore Local Plan (pol ST3) applies where the primary objective is protection from isolated and/or large scales of development. Policy D24 (conserving & enhancing valued landscapes) also applies. A 'rural lane' designation touches the south-eastern border of the area.	None	Low - location is on a country lane.	Good compatibility to restaurant /leisure on west side of Selling Road, but low compatibility with open countryside to the south.	Town centre 2.0kms.	Poor	Possible limitations placed by layout of existing buildings.	Reasonable	J6 M2 2.0kms (via Canterbury Road & A251).	Excellent
F63	Standard Quay		Faversham	A collection of small scale historic boat yard buildings and older industrial buildings on Faversham Creek occupied by a mix of industrial uses (incl engineering works), boat and auto repair/servicing with crafts, leisure and retail mixed in.	1.2	Mixed B uses	Within the built up area	None	Flood risk (FZ3).	Minor	A Creekside location, remote from busy routes and high profile locations..	The activities are more light industrial, providing services / products for consumers rather than any industrial process activity, and hence uses are generally compatible with neighbouring residential.	Town centre 0.6kms.	Reasonable	The retention of historic boatyard buildings means Standard Quay is an attractive location, albeit parking and servicing is tight.	Reasonable	J6 M2 3kms (via B2040/41 and Canterbury Road).	Good
F63	Brent's Industrial Estate		Faversham	A collection of historic boat yard buildings and older industrial buildings on Faversham Creek that are occupied by a mix of industrial uses (incl engineering works), boat and auto repair/servicing, other local services such as trade counter with leisure and retail mixed in.	2.7	Mixed B uses	Within the built up area	None	Flood risk (FZ3), neighbouring residential and poor access.	Minor	A Creekside location, remote from busy routes and high profile locations..	The activities are more light industrial, providing services / products for consumers rather than any industrial process activity, and hence uses are generally compatible with neighbouring residential.	Town centre 0.6kms.	Reasonable	Brents contains long established small scale industrial sheds. Parking and servicing are tight with little off street dedicated parking.	Reasonable	J6 M2 3kms (via B2040/41 and Canterbury Road).	Good

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BASIC INFORMATION											**REVIEW / RECOMMENDATION**					
		Local access by road		***Public transport access***												
Site ID.	**Site name**	**Site junction and quality of access to the principal road network**	**Score**	**Is the site close to a railway station (within 400m)?**	**Station name, number of bus stops within a 400 m radius**	**Score**	**Vacancy**	**Vacancy Score**	**Other market intelligence e.g. market history, competing supply nearby, occupiers known to be moving in/out,**	**Score**	**If the site retains its current use, will it be occupied?**	**Are there opportunities for redevelopment / intensification / extension?**	**Developable land (ha)**	**Are there any constraints on redevelopment / intensification / extension?**	**When are these constraint(s) likely to be resolved?**	**Recommend-ation**
F17	Former Frank and Whitome Site (Site B)	The route to the M2 through the historic town centre (South Lane, Canterbury Rd and A251) is not suitable for large vehicles.	Poor	No	18	Good	No	Nil	Units are historic and not of modern specification, but attractive to creative activity, and are currently in occupation.	Reasonable	Unlikely	The buildings are listed, and therefore the buildings are likely to stay in employment use, either wholly or through a mix of offices/residential uses.	n/a	Yes, poor access, neighbouring residential/hotel/leisure uses, the need to revamp the premises, historic building and flood risk.	Available in the Plan period	Safeguard
F18	Brett Aggregates office site	Good access to Western Link from Bysing Wood Road.	Good	No	12	Reasonable	None	Nil	There is limited out of town offices in Faversham so there is minimal competing supply. Units have modern specification and will be re-occupied if current occupiers vacate.	Good	Yes	No	n/a	Major - The site is within a 'local designated site of biodiversity' and an 'area of high landscape value'.	Not in the Plan period	Safeguard
F19	John Hall Close Industrial Estate	The Western Link, London Rd and A251 provide an excellent link avoiding the town centre to the M2. Change excellent to good and add - however pinch point at Ospringe and air quality issues and then change rating to Good.	Good	No	9	Reasonable	Very little	Low	Units are dated, but well occupied. Agents report that units re-let when occupiers vacate. This should continue to be the case over the plan period.	Good	Yes	Yes, 0.5 ha of land immediately to the west. But this area is severely constrained by floodrisk.	0.5	Yes, floodrisk. The site is wholly in FZ3 and contains a small pumping station.	Available in the Plan period	Safeguard
F21	Macknade Fine Foods	Access road to A2 would need upgrading if large vehicles were to use the area.	Poor	no	12	Reasonable	None	Nil	None known	Don't Know	Yes	Given the location is on he edge of open countryside, reuse of existing buildings is the realistic limitation.		Open countryside policy.	Not in the Plan period	Safeguard
F63	Standard Quay	Abbey Street is not suitable for large vehicles, and the route to the Mway requires passing through the town centre. Only suited to smaller vans and cars.	Poor	No	1	Poor	None	Nil	The boatyard facilities to the south of the Creek will have limited scope for other uses if occupiers leave.	Reasonable	Yes	No. The historic buildings and access arrangements mean there is no prospect of expansion or intensification.	n/a	Yes, the historic buildings, poor quality access and flood risk.	Not in the Plan period	Safeguard
F63	Brent's Industrial Estate	Upper Brents is not suited to large vehicles, and the route to the Mway requires passing through the town centre. Only suited to smaller vans and car borne traffic.	Poor	No	3	Poor	None	Nil	The Brents industrial estate is well occupied, but units are generally dated and in some cases may be coming to the end of their economic life.	Reasonable	Yes	No. The historic buildings and access arrangements mean there is no prospect of expansion or intensification.	n/a	Yes, the historic buildings, poor quality access and flood risk.	Not in the Plan period	Safeguard

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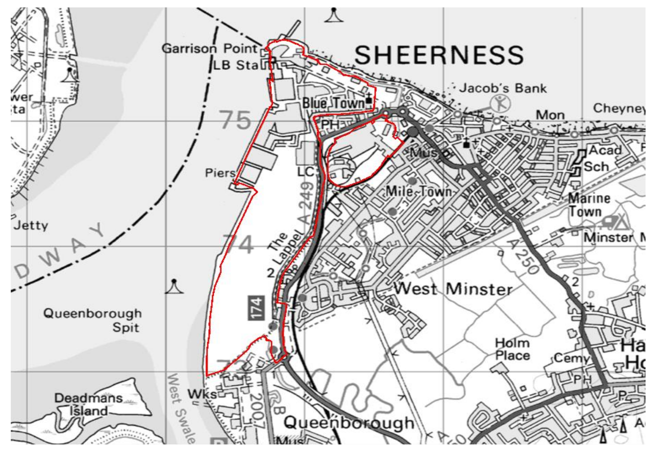
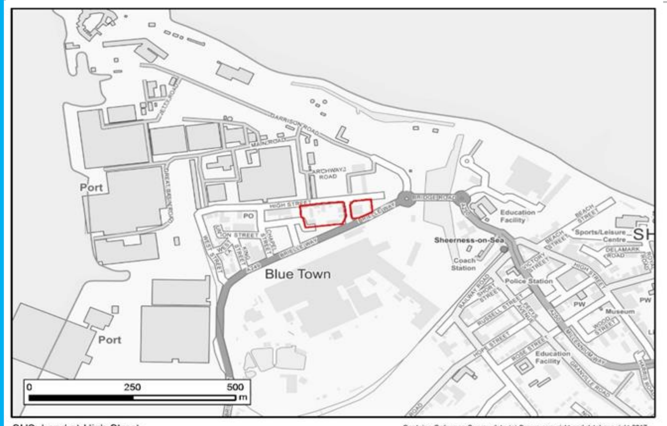
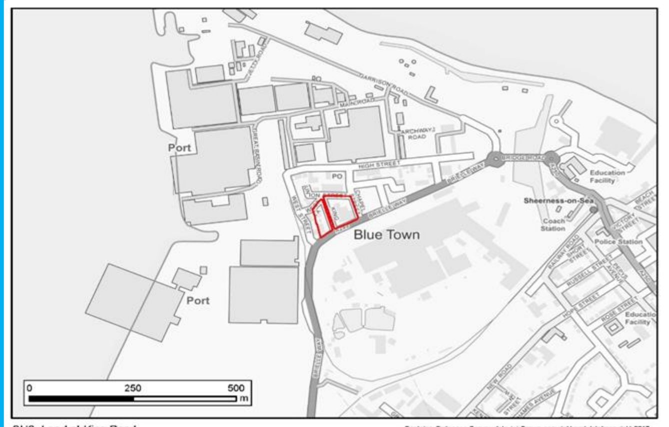
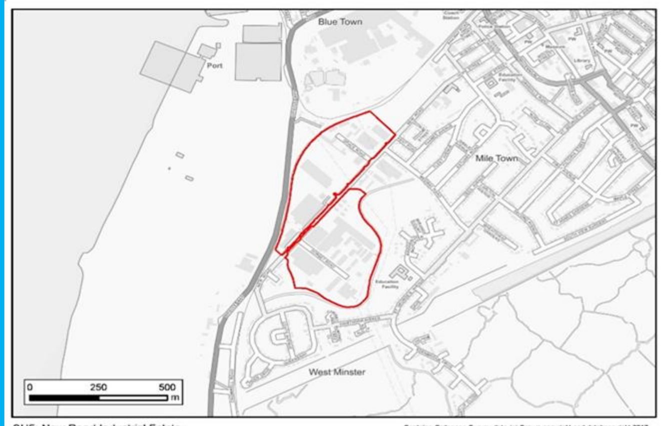
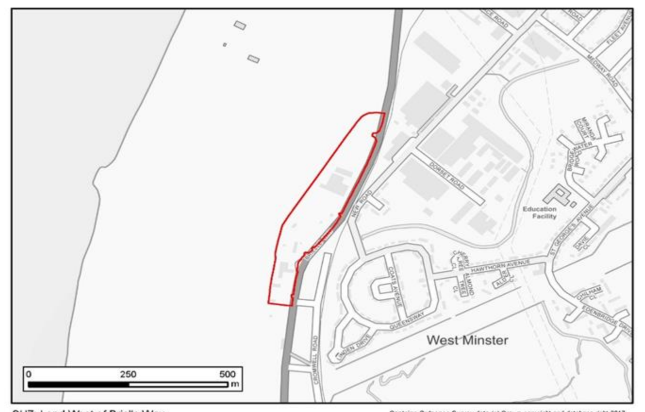
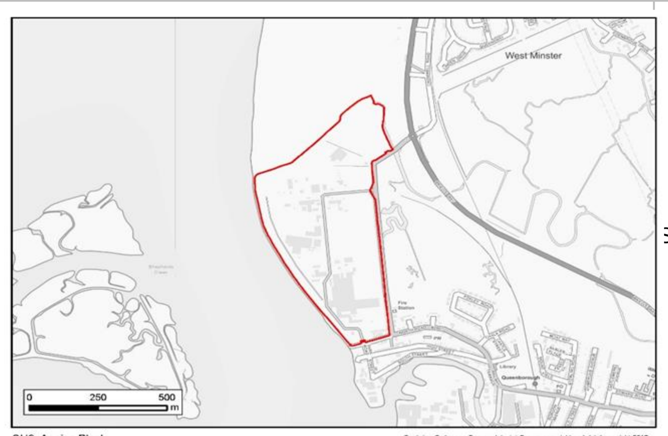
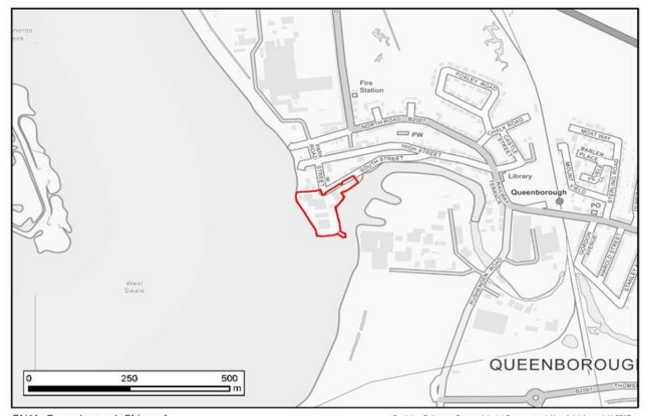
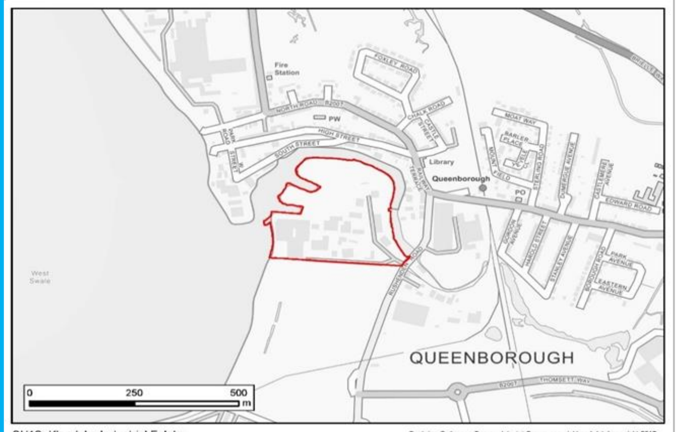
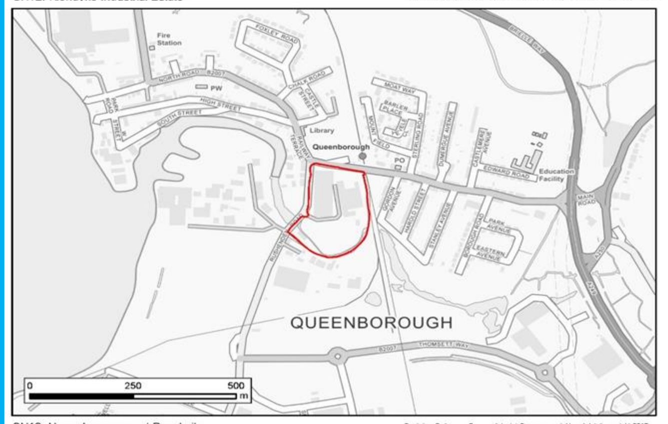
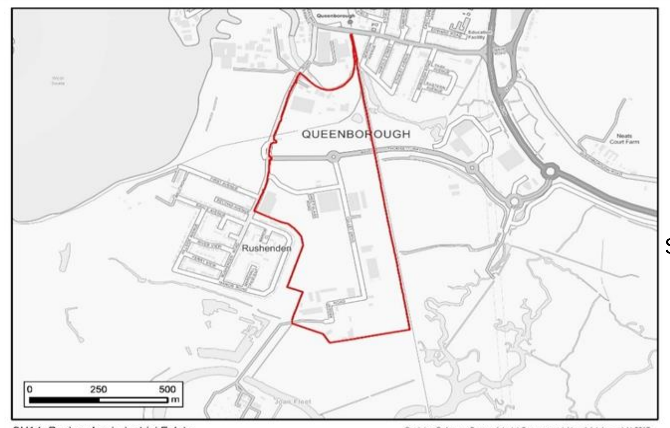
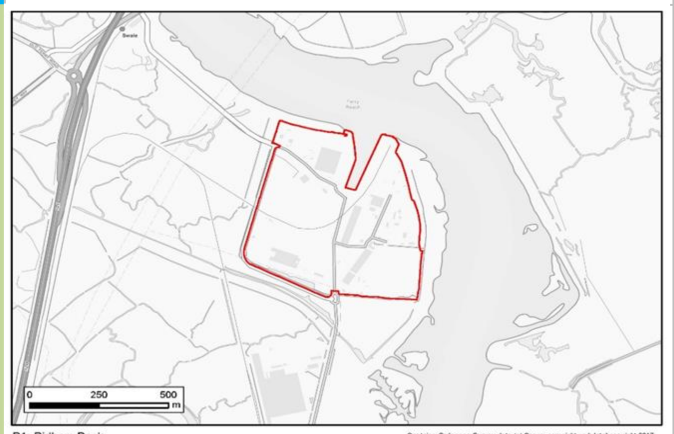
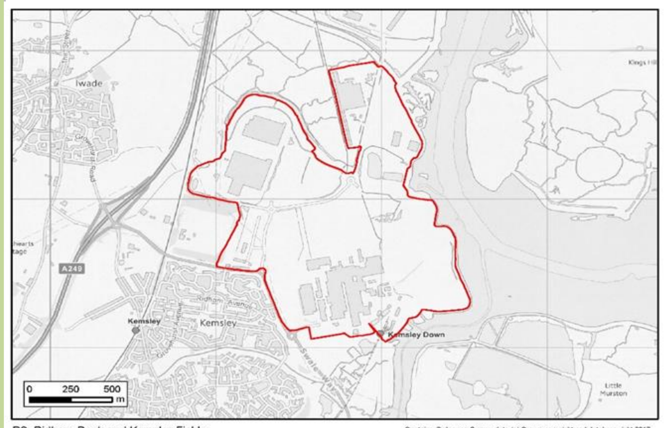
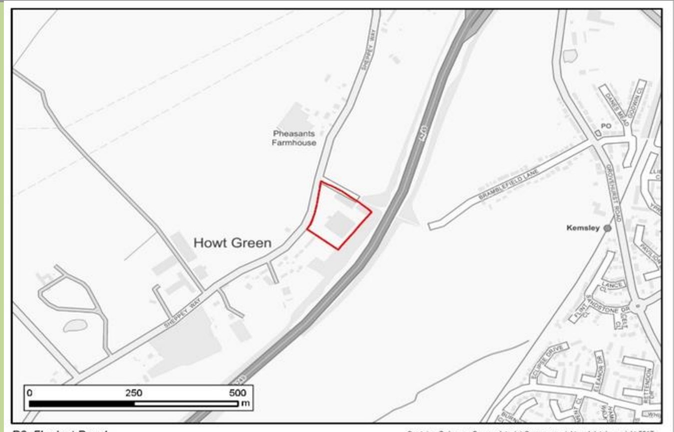
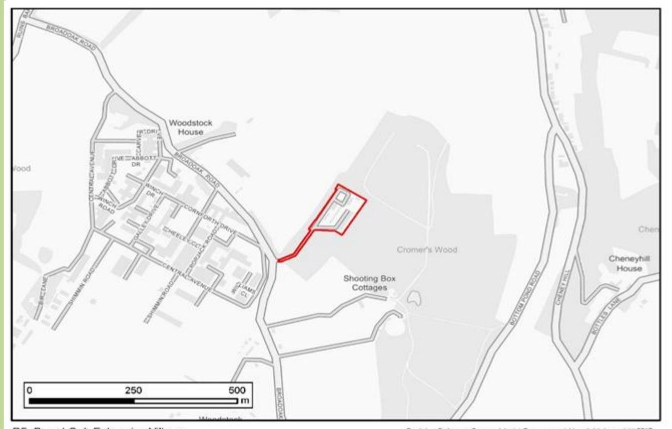
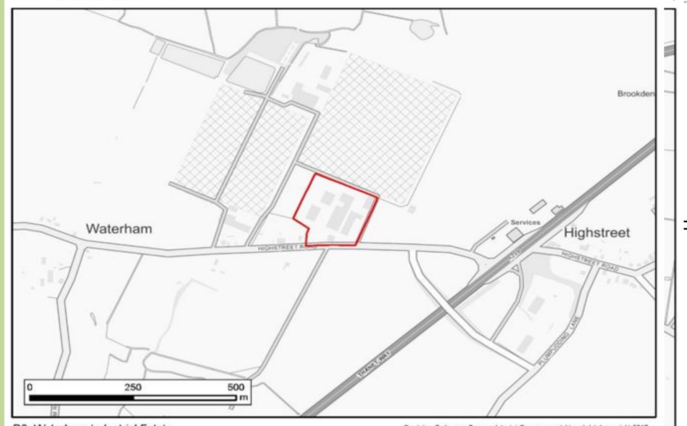
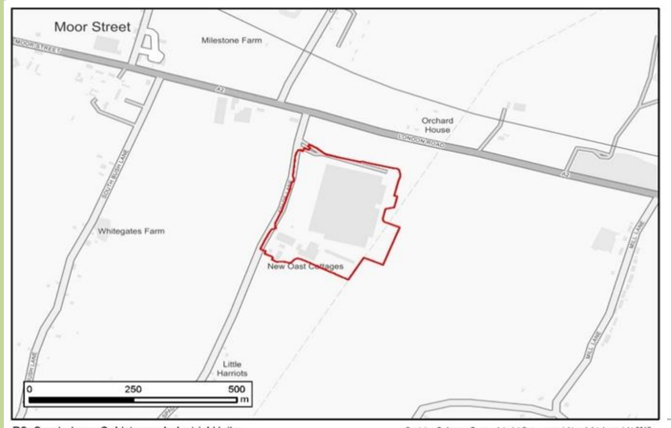
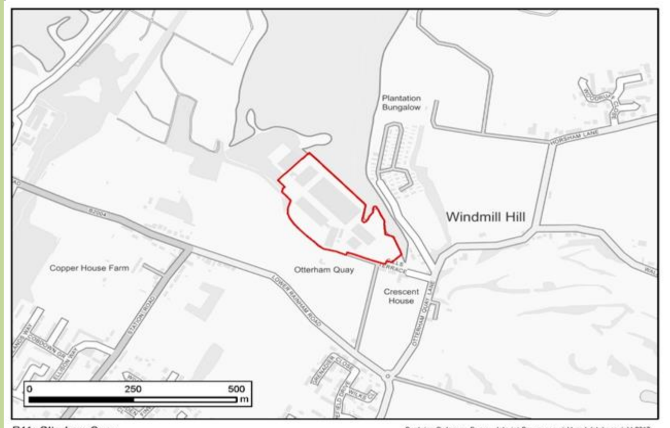
BASIC INFORMATION									CONSTRAINTS		ATTRACTIVENESS TO OCCUPIERS *External environment*				*Internal environment*		*Strategic accessibility (road)*	
Site ID.	Site name	Site location map	Market area	Site description	Site area (ha)	Primary type of employ-ment	Site's sequential location	Current relevant planning	Detail any constraint(s)	Bad neighbour impact	Prominence of site	Compatibility with surrounding uses	Access to amenities (nearest centre km)	Score	Layout, parking, servicing, landscaping etc.	Score	Proximity to Mway/ principal roads [kms]	Score
SH1/4	Port of Sheerness		Sheerness	Peel Ports - with the docks and open storage in the northern and western side of Brielle Way (the A249). Within this northern area is Blue Town, an historic area with some of the oldest Port buildings and infrastructure. East of Brielle Way is the site of the former Wellmarsh steel mill, which is in the process of being cleared to accommodate Port uses, and we understand some 20 ha could potentially be used for steel production.	146 ha	Mixed B uses	Within 400m of town centre	Loss of B2 (54,000 sq m) and gain of 30,000 sq m of Sui Generis (port related uses including port automotive open storage and multi-user open storage) on the entirety of the site to the south of the A249.	Scheduled monument (Sheerness Defences) within the northern Royal Naval Dockyard and Blue town conservation areas. To the south bounded by a National Site designated solely for biodiversity & geological value, a SSSI and special protection area, with Coastal Change management area to the west. Several listed buildings are located in the northern section of the site along Garrison Road and Blue Town. On the eastern land parcel is one listed building and part of the Sheerness Defence scheduled monument.	Minor	High - large scale historic dockyard site.	Neighbouring Blue Town has developed and evolved to serve the naval then dockyard functions. No incompatibility issues.	Immediate in Blue Town, at nearby superstore & town centre 0.5 kms.	Good	It is understood that the Port provides a mix of historic and more modern buildings developed to support a long history of varying port activity, but these are less than ideal for modern office or industrial needs.	Reasonable	J5 M2 17kms (via A249).	Reasonable
SH2	Duke of Clarence Estate (Land at High Street)	 SH2: Land at High Street	Sheerness	A small trading estate in Blue Town with older small unit stock mostly occupied by businesses catering for the local consumer services market.	0.8	Light Industrial (B1c)	Within 400m of town centre	None	Adjoining the Sheerness: Royal Naval Dockyard and Blue town Conservation area. Some residential nearby.	Minor	Good - immediately on the A249 and close to Port entrance.	Good - providing local services from small units buffered by the busy A249.	Immediate in Blue Town, at nearby superstore and town centre 0.5 kms.	Good	The larger parcel has a courtyard for parking and servicing, and both are adequately served. Little landscaping, but buildings immediately on the A249 and in an urban setting .	Reasonable	J5 M2 17kms (via A249).	Reasonable
SH3	Land at King Road	 SH3: Land at King Road	Sheerness	Older industrial and warehousing stock with areas of outdoor storage for engineering/building materials.	0.8	Storage and Distribution (B8)	Within 400m of a town centre	None	Adjoining the Sheerness: Royal Naval Dockyard and Blue town Conservation area. Some residential nearby.	Minor	Good - immediately on the A249 and close to Port entrance.	Good - providing local services from small units buffered by the busy A249.	Immediate in Blue Town, at nearby superstore and town centre 0.5 kms.	Good	Parcels either side of King Street provide a poor setting with on-street parking on a narrow road, and poor quality buildings lacking any landscaping.	Poor	J5 M2 17kms (via A249).	Reasonable
SH5	New Road Industrial Estate	 SH5: New Road Industrial Estate	Sheerness	Long established industrial estate with a mix of unit sizes, including small units in the Regis Business Park. Bounded by the railway line and The Fleet water course, and bisected by New Road.	21.1	Mixed B uses	Within the built up area	None	Access restricted through the town centre and the residential area leading to the A249. Site crossed by electricity cables/pylons, but otherwise unconstrained.	Minor	Low - site has a low profile because it is on the other side of the tracks from the A249, and New Road is a minor road linking to a small residential area.	Middling given proximity to other industrial to the north, but residential to the south.	Town centre 1.3kms.	Reasonable	Low density development with buildings set back from the street and plenty of on-site parking and servicing space. Little landscaping, and site crossed by electricity pylons.	Reasonable	J5 M2 18.5kms (via A249).	Reasonable
SH7	Land West of Brielle Way	 SH7: Land West of Brielle Way	Sheerness	An industrial area largely linked to vehicle import/export.	4.9	Mixed B uses	Within the built up area	None	Flood risk Zone 3, but with significant flood defences in the area.	None	Units have good visibility on the A249.	High -wedged between the Port open storage area and the A249/railway.	Town centre 2.3kms.	Poor	Narrow site leaves little room for significant landscaping. Location on A249 means all parking and servicing are on-site.	Reasonable	J5 M2 16.5kms (via A249).	Reasonable
SH9	Aesica Plant	 SH9: Aesica Plant	Sheerness	A manufacturing & development site for Aesica pharmaceuticals.	29.9	General Industrial (B2)	Adjacent to the built up area	Permission for extension on the southern part of the site - 9,930 sq m B8 and B2. Part implemented.	This site is within FZ3. Immediately to the north is a Site of Special Scientific Interest (Medway Estuary and Marshes) and to the south is the Queenborough Conservation Area (including several listed buildings). To the east is a locally designated site of biodiversity, an important local countryside gap, a coastal change management area, and an area of high landscape value (Swale Level).	None	Middling - clearly visible from Queenborough.	Good - the manufacturing activity is bounded by the open storage and other industrial uses to the north and the company office buildings to the south form a buffer between the heavy industrial activity and the residential in Queenborough to the south.	Queenborough 0.5 kms.	Good	The manufacturing plant and office have separate access arrangements, both linking with Whiteway Road, and the office accessing off the High Street. The latter is narrow and constrained, but is sufficient for the office based car journeys. The site is landscaped and some screening of the manufacturing plant.	Good	J5 M2 16kms (via A249).	Reasonable

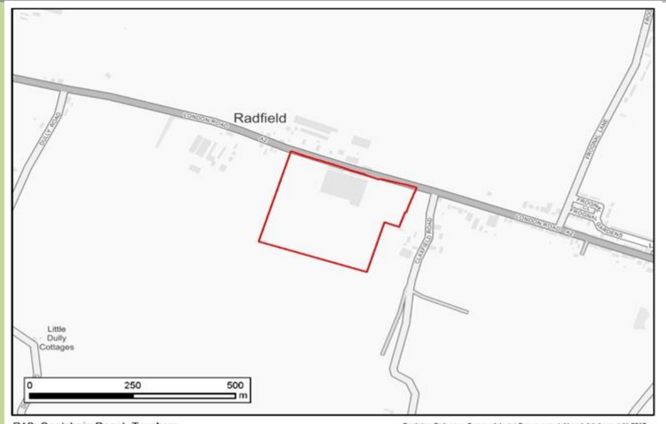
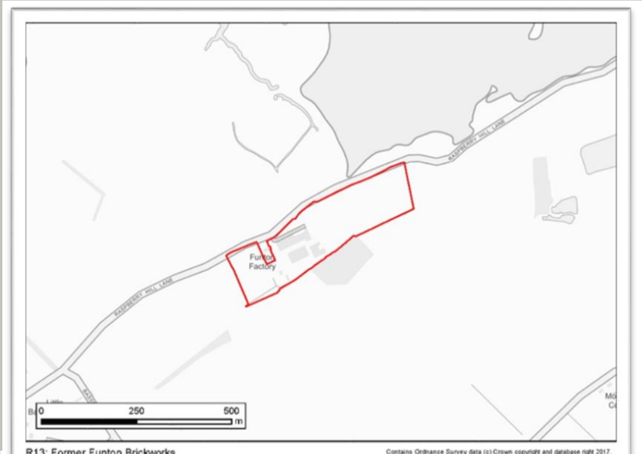
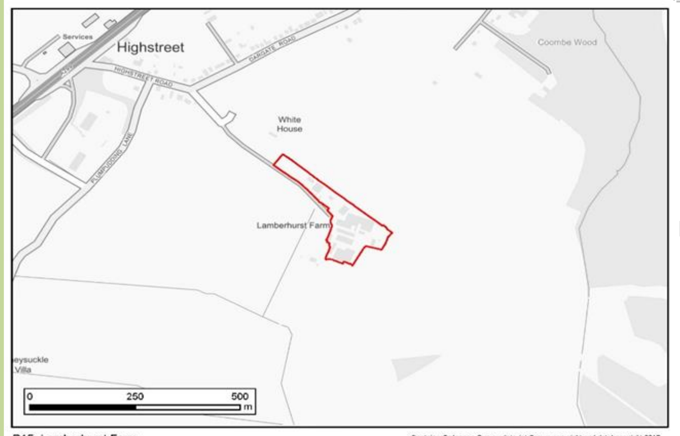
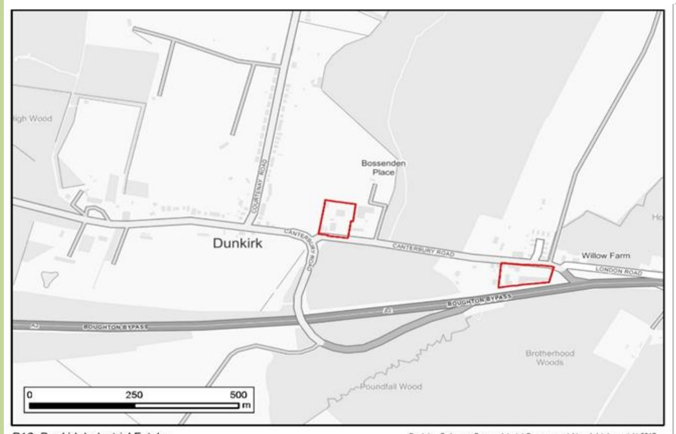
1	2	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34
BASIC INFORMATION		*Local access by road*		*Public transport access*							REVIEW / RECOMMENDATION					
Site ID.	Site name	Site junction and quality of access to the principal road network	Score	Is the site close to a railway station (within 400m)?	Station name, number of bus stops within a 400 m radius	Score	Vacancy	Vacancy Score	Other market intelligence e.g. market history, competing supply nearby, occupiers known to be moving in/out,	Score	If the site retains its current use, will it be occupied?	Are there opportunities for redevelopment / intensification / extension?	Developable land (ha)	Are there any constraints on redevelopment / intensification / extension?	When are these constraint(s) likely to be resolved?	Recommend-ation
SH1/4	Port of Sheerness	Access on to Breille Way (A249) is good, albeit single carriageway through the town, but A249 is duelled outside the town boundary.	Good	Yes	9	Good	Operating at approximately 98% occupancy	Low	The port's focus is on B8 storage uses, but there is some manufacturing activity. The key growth sector for Peel Ports is the automotive sector. The port is short of land, and is currently operating at 98% occupancy. Peel Ports forecast significant job growth in the coming years, if it can expand its operational land either at Rushenden Marshes to the south, or on reclaimed land to the north. The port Authority have recently constructed a bridge over the A249 connecting its facilities, and redeveloped the former Wellmarsh steel mill site that has mainly provided for B8 uses. 20 ha of the Port site remains in manufacturing use, with potential interest from a steel manufacturer to reuse this part of the site.	Good	Yes	There are large cleared sites in the area south of the A249. The Port has a number of live permissions. However, the Port uses are specialist and not part of the 'normal' industrial provision.	n/a	No	N/A	Safeguard
SH2	Duke of Clarence Estate (Land at High Street)	Access on to Breille Way (A249) is good and direct via a route between the two parcels. Brielle Way is single carriageway through the town, but A249 is duelled outside the town boundary.	Good	Yes	9	Good	None	Nil	The units are small and are occupied by local businesses. The units are well located to serve the local market and there is limited competition from other areas. But, the units are dated and are coming towards the end of their economic life. Strong enough demand should sites be redeveloped for B2/B8 uses, subject to viability.	Reasonable	Yes	Not beyond replacement on a scale broadly equivalent to what is there now.	n/a	The historic setting.	Available in the Plan period	Safeguard
SH3	Land at King Road	Access on to Breille Way (A249) is good via three options, albeit single carriageway through the town, but A249 is duelled outside the town boundary.	Good	No	9	Reasonable	None	Nil	The units are small and are occupied by local businesses. The units are well located to serve the local market and there is limited competition from other areas. But, the units are dated and are coming towards the end of their economic life. Strong enough demand should sites be redeveloped for B2/B8 uses, subject to viability.	Reasonable	Yes	Not beyond replacement on a scale broadly equivalent to what is there now.	n/a	The historic setting.	Available in the Plan period	Safeguard
SH5	New Road Industrial Estate	To access the A249 via New Road (adequate) and some residential roads to the Bridge Road roundabout.	Poor	No	9	Reasonable	Some vacant units, but overall vacancy is low	Low	The quality of the existing stock varies, but rents are generally affordable. There are some buildings that have been vacant for long periods of time. Units on Dorset Road are generally better quality than the rest of the site. These units will be more attractive to occupiers over the plan period.	Good	Yes	There is an undeveloped site on the northern side of New Road (1.7ha), but is crossed by overhead electricity cables that are likely to have precluded development.	n/a	The electricity cables and flood risk (whole area in FZ3.	Not in the Plan period	Safeguard
SH7	Land West of Brielle Way	All units are accessed directly on/off the A249, which is single carriageway at this point.	Good	No	21	Good	None	Nil	Units to the north are of reasonable quality, but some are bespoke, having been built to service car importing sector. To the south of the area the units are poorer quality and are coming to the end of their economic life.	Good	Yes	No	n/a	Access on to the A249	Available in the Plan period	Safeguard
SH9	Aesica Plant	Whiteway Road provides a direct link to the A249.	Excellent	No	0	Very Poor	None	Nil	The buildings are in reasonable condition, but the facility is bespoke and it may be difficult to find a new occupier should Aesica leave. But, as the facility is currently being expanded, there is little prospect of this happening in the near future.	Good	Yes	An expansion of the manufacturing activity is currently underway within the site boundary.	n/a	A number of national and local designations including the SPA and inclusion in FZ3, plus the local wildlife site and potential impact on the Queenborough Conservation Area.	Available in the Plan period	Safeguard

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19
BASIC INFORMATION									CONSTRAINTS		ATTRACTIVENESS TO OCCUPIERS							
											External environment				*Internal environment*		*Strategic accessibility (road)*	
Site ID.	Site name	Site location map	Market area	Site description	Site area (ha)	Primary type of employ-ment	Site's sequential location	Current relevant planning	Detail any constraint(s)	Bad neighbour impact	Prominence of site	Compatibility with surrounding uses	Access to amenities (nearest centre km)	Score	Layout, parking, servicing, landscaping etc.	Score	Proximity to Mway/ principal roads [kms]	Score
SH11	Queenborough Shipyard	 SH11: Queenborough Shipyard	Sheerness	A small wharfside site used by a single operator (Marine & Industrial transmissions) for marine engineering.	1.2	General Industrial (B2)	Within the built up area	The area is allocated in Pol Regen 2 for mixed use as part of the wider Queenborough and Rushenden Masterplan area, which would include continued use for marine related activity.	The site is located within the Queenborough Conservation Area (with a listed building directly to the north of the site), within flood zone 3 and an international and national designated site of biodiversity and/or geological value (the SPA), and the coastal change management area abuts the western boundary of the site. Access to this wharfside location is very tight through residential streets.	Minor	Low - from the landside as screened by the residential.	Specialist marine uses are generally compatible with neighbouring residential.	Queenborough 0.8kms.	Reasonable	Buildings central to the site, and plenty of parking /servicing space on the wharfside.	Good	J5 M2 15kms (via Main Road Queenborough A2007 and the A249)	Reasonable
SH12	Klondyke Industrial Estate	 SH12: Klondyke Industrial Estate	Sheerness	A long established and now poor quality industrial estate bounded by the Queenborough Creek, and with land immediately to the south with permission for a recycling facility and recently cleared land.	7.0	General Industrial (B2)	Within the built up area	2013 permission for demolition and site clearance. No permissions or applications for alternative uses. The area is allocated in Pol Regen 2 for future residential use as part of the wider Queenborough and Rushenden Masterplan area.	The site is located within the Queenborough Conservation Area, within flood zone 3 and an international and national designated site of biodiversity and/or geological value (the SPA), and the coastal change management area to the west.	Minor	Low- the site is accessed / visible from a minor road.	Generally good, because the Creek provides separation, and the nearby uses are open storage. However, the masterplan promotes the area for residential development, and an element of general industrial activity would be incompatible with this use.	Queenborough 0.5kms.	Good	Very poor environment with a number of buildings constructed of poor quality tin, and a disorganised building layout. There are sufficient areas for parking & servicing.	Very Poor	J5 M2 15kms (via Rushenden Road, Thomsett Road and the A249)	Reasonable
SH13	Olympic Glass	 SH13: Home Improvement Depot site	Sheerness	Corporate office and manufacturing site (occupied by Olympic Glass).	3.5	General Industrial (B2)	Within the built up area	The area is adjoining but outside Pol Regen 2.	Site part in FZ2 3. Backs on to railway line, industrial to the south and haulage and other open storage to the west.	None	Middling - highly visible site in Queenborough.	Good - industrial to the south and haulage and other open storage to the west.	Queenborough 0.2kms.	Good	Site split between two large buildings set back in the site with some landscaping/screening. Separate office and manufacturing servicing access arrangements. Southern part of the site is open / parking area due to flood risk issues.	Reasonable	J5 M2 15kms (via Rushenden Road, Thomsett Road and the A249)	Reasonable
SH14	Rushenden Industrial Estate	 SH14: Rushenden Industrial Estate	Sheerness	Predominantly an area of open storage for the pre-delivery inspection of cars, but also storage if building materials and haulage. In the southern-most part there are a number of smaller industrial units that are fully occupied. North of the new link road, Thomsett Way, is the site of the former steel rolling mill that is largely cleared and runs to 5.7 ha (source: EIA screening). At the very northern perimeter are some older poor quality industrial buildings and areas of open storage for car parts salvage. The area immediately to the east across the railway line that is used exclusively for open storage for PDI of cars.	37.8	Storage and Distribution (B8)	Within the built up area	The Istil steel mill closed in 2013. 2018 EIA screening application to create a development platform (addressing floodrisk issues) approved. The site is allocated in Pol Regen 2 for future low rise residential use as part of the wider Queenborough and Rushenden Masterplan area.	Floodrisk (FZs 2 and 3).	None	Middling - not on A249, but on fast new link road.	Generally surroundings are compatible - other industrial and leisure, but residential to the southwest.	Superstore and leisure activity 600m and Queenborough 1kms.	Reasonable	South of Thomsett Way the activity takes place east and west of Cullet Drive and all parking and servicing is managed on-site. Because the area is mostly open storage the area is characterised by palisade fencing, which produces a poor quality environment. North of Thomsett Way the long established area presents a poor environment with on street parking and little in the way of landscaping.	Poor	J5 M2 14kms (via Thomsett Road).	Reasonable
R1	Ridham Dock	 R1: Ridham Dock	Sittingbourne	Docks on The Swale with heavy industrial processes mostly construction related, such as concrete batching and plaster, and materials recovery and waste management activity. Most activity is open, with the only large building that needed for waste management.	33.9	General Industrial (B2)	Adjacent to the built up area	None	The site is bounded by the Site of Special Scientific Interest, international and national designated site of biodiversity and/or geological value (the SPA).	None	Middling - whilst the site is remote, the landscape is flat and the site can be seen from the A249 and other routes.	Good -part of the wider Kemsley Fields Business Park area, with large scale industrial activity.	Nothing in immediate vicinity.	Poor	All activity takes place within the dock compound.	Reasonable	J5 M2 11kms. A249 J 1.8kms via dedicated link.	Reasonable
R2	Kemsley Fields	 R2: Ridham Dock and Kemsley Fields	Sittingbourne	This is a large area bordering the Swale that houses key industrial employers (DM Smith and Knauf), the Morrisons distribution facility and also the OYO Business Centre on the western side of Barge Way. To the east of the DM Smith papermill and bordering the Swale is the former open coal store site where the Wheelabrator Combined Heat and Power plant is currently being built (due to be operational in 2019).	183.4	Mixed B uses	Within the built up area	The two principle planning permissions in the area are the Wheelabrator permission to the east of the Paper Mill for an energy from waste station that comprises a 2,475 sq m B2 gain, plus the 6,896 sq m generator facility, and a 5,316sq m recycling building on Dock Road.	Other undeveloped land to the east of Smiths and adjacent to the Swale is mainly within FZ3.	None	High - the sites are extremely large and visible from the road network.	Largely self-contained, with a large buffer area between Smiths and the nearest residential.	Nothing in immediate vicinity. Businesses likely to be self-sufficient.	Poor	All parking and service activity is self-contained on-site, and activity has been screened through soft landscaping to a degree.	Reasonable	J5 M2 8.5kms. A249 J 1.8kms via dedicated link.	Good

1	2	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34
BASIC INFORMATION		***Local access by road***		***Public transport access***							**REVIEW / RECOMMENDATION**					
Site ID.	**Site name**	**Site junction and quality of access to the principal road network**	**Score**	**Is the site close to a railway station (within 400m)?**	**Station name, number of bus stops within a 400 m radius**	**Score**	**Vacancy**	**Vacancy Score**	**Other market intelligence e.g. market history, competing supply nearby, occupiers known to be moving in/out,**	**Score**	**If the site retains its current use, will it be occupied?**	**Are there opportunities for redevelopment / intensification / extension?**	**Developable land (ha)**	**Are there any constraints on redevelopment / intensification / extension?**	**When are these constraint(s) likely to be resolved?**	**Recommend-ation**
SH11	Queenborough Shipyard	Poor - link roads are narrow and residential.	Poor	No	6	Reasonable	None	Nil	Units are in reasonable condition and seem well occupied. Occupiers from the marine sector will find this location attractive.	Reasonable	Hard to tell	Not for intensified employment use. The future for this site is likely to be mixed use, should there remain a need for the marine related activities in this location.	n/a	Sensitivity of wharfside location in particular heritage and habitat designations. Floodrisk.	N/A	Allow managed release
SH12	Klondyke Industrial Estate	Good - Rushenden Road and Thomsett Road provide a link to the A249 without passing through residential or town centre areas.	Good	Yes	Station is Queenborough. Bus stops: 27	Excellent	High	Nil	Most units have been vacated with Homes England taking control of the site with the intention of redevelopment for residential purposes . The rents/capital values reflect the quality of the stock.	Very Poor	No	The site is allocated in Pol Regen 2 for residential use as part of the wider Queenborough and Rushenden Masterplan area.	-7.0	Sensitivity of wharfside location in particular heritage and habitat designations. Floodrisk.	N/A	Allow managed release
SH13	Olympic Glass	Good - Rushenden Road and Thomsett Road provide a link to the A249 without passing through residential or town centre areas.	Good	Yes	Station is Queenborough. Bus stops: 33	Excellent	None	Nil	There is a single occupier and the unit is dated. It may be difficult to find a single new occupier if Olympic Glass choose to re-locate. Site will need to be redeveloped to attract occupiers during the plan period, subject to viability.	Reasonable	Yes	No, site is already high density.	n/a	Floodrisk on the southern parcel.	Not in the Plan period	Safeguard
SH14	Rushenden Industrial Estate	Good - Thomsett Way provides direct access within 1km to the A249. The new link road has brought considerable improvement in access to the industrial estate.	Excellent	No	15	Reasonable	Possibly some vacancy	Low	The majority of the site is used for car storage/inspection, which is a land intensive use. Proximity to the port is a key requirement for the large car manufacturers importing to the UK - parts of the site could be redeveloped during the plan period.	Reasonable	Yes	The bulk of the area is established employment uses, and should be retained. The area north of Thomsett Way, the 5.7 ha former steel mill site is part of a wider regeneration area (Pol Regen2) that will focus on delivering residential use on this and the other former employment sites adjacent to Queenborough Creek. The use of this site for residential will reduce the existing employment area by 5.7ha.	-5,7	Flood risk and contamination associated with the past industrial use.	N/A	Safeguard
R1	Ridham Dock	A dedicated (albeit unadopted) route is provided to link to the A249 close to the Sheppey Bridge Crossing.	Good	No	0	Very Poor	None	Nil	The current heavy industry units will not be suitable for other occupiers if current construction and waste management uses vacate the site. But the uses are not compatible in other areas and it is unlikely the current occupiers will relocate. Site has good road network and would be attractive to similar industries over the plan period.	Reasonable	Yes	No	n/a	n/a	N/A	Safeguard
R2	Kemsley Fields	Existing A249 roundabouts with Barge Way and Fleet Road offer very good links to the A249.	Good	No	0	Very Poor	None	Nil	The area is large with a number of different uses present. To the east, Morrisons occupy the large distribution units, which are good quality and will be re-occupied if Morrison re-locate. To the south and the north are DS Smith and Knauf UK. These units are bespoke and would not suit other occupiers if the current occupiers vacate. But there is no indication that either intend to. Site has good road network and would be attractive to similar industries over the plan period.	Good	Yes	In addition to the proposal for CHP plant at the Kemsley Paper Mill and the recycling facility on Ridham Dock Road. Yes, two parcels identified in the A1i allocation: i) land to the north of Barge Way - 11 ha site next to Morrisons. Access available on to the Barge Way roundabout. ii) land between Smiths and Barge Way - a 10 ha site that is retained for future potential expansion of Smiths, and therefore is not available for general industrial use.	see allocation A1i	Smiths likely to need options ii) and iii) for their future expansion plans. Flood risk is the main and considerable constraint.	Available in the Plan period	Safeguard

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19
BASIC INFORMATION									CONSTRAINTS		ATTRACTIVENESS TO OCCUPIERS							
											External environment				*Internal environment*		*Strategic accessibility (road)*	
Site ID.	Site name	Site location map	Market area	Site description	Site area (ha)	Primary type of employ-ment	Site's sequential location	Current relevant planning	Detail any constraint(s)	Bad neighbour impact	Prominence of site	Compatibility with surrounding uses	Access to amenities (nearest centre km)	Score	Layout, parking, servicing, landscaping etc.	Score	Proximity to Mway/ principal roads [kms]	Score
R4	Kent Science Park	 R3: Floplast Depot	(Rural)	Campus style low density Science Park accommodating 48,000 sq m of R&D (predominantly pharmacy & life sciences) & office to the south of Sittingbourne. Undeveloped areas within the envelope to the north, south and west	45.9	B1	Outside the built up area	Currently unimplemented 2016 permission for 4,087sq m of B2 use in the centre of the site.	The site is partially in an area of high landscape value, and there is a locally designated site of biodiversity to the east.	None	Low - a remote location.	Low - surrounded by open countryside/farm land, but no surrounding uses that cause incompatibility issues.	Some provision on site and at the adjacent Woodstock Club. Sittingbourne 4 kms.	Reasonable	High quality landscaped environment, with ample parking and servicing space.	Excellent	J5 M2 10kms. A249 J 6kms.	Reasonable
R5	Broadoak Enterprise Village	 R5: Broad Oak Enterprise Village	Rural	Located close to the KSP the Broadoak Enterprise Village is currently let to a single occupier, BBI.	1.0	B1	Outside the built up area	None	The site is surrounded by an area of high landscape value, and a local designated site of biodiversity.	None	Low - the site is in a remote location, accessed via narrow county lanes.	Low - surrounded by open countryside/farm land, but no surrounding uses that cause incompatibility issues.	Nothing in immediate vicinity. Nearest Sittingbourne 4 kms.	Poor	High quality landscaped environment, with ample parking and servicing space.	Good	J5 M2 10kms. A249 J 6kms.	Reasonable
R8	Waterham Industrial Estate	 R8: Waterham Industrial Estate	Rural	A small industrial estate in a rural location with junction access to the A299 (Thanet Way). The site is bordered by a small number of residential and two very large glass houses. The principle use is storage which occupies the newer units, but some of the older units are used for engineering activity.	2.6	Storage and Distribution (B8)	Outside the built up area	None	No relevant policy designations	Minor	Low - in the countryside.	Dwarfed in breadth by the scale of the nursery glass houses.	Limited provision in High Street. Nearest centre Whitstable 5.5 kms.	Reasonable	Whilst in the countryside the estate lacks soft landscaping, but the parking and servicing areas are ample.	Reasonable	A299 (that becomes M2 at J7) in 0.5 kms.	Excellent
R9	Spade Lane Coldstore		Rural	A large warehouse with various auto repair units in small industrial units to the rear.	7.9	Storage and Distribution (B8)	Outside the built up area	None	Site backs onto open countryside.	None	Middling - on the busy A2, but not at a junction	Surrounds are non-industrial, mainly agricultural.	Limited provision in Rainham 1.5 kms. Nearest major offer Sittingbourne 7.5 kms.	Reasonable	Building set back from the road with plentiful landscaping and parking. Servicing to side and rear.	Good	M2 J4 in7.7 kms. Immediate access to A2.	Reasonable
R10	Newington Industrial Estate	 R10: Newington Industrial Estate	Rural	A small well occupied industrial estate providing mostly open storage for building materials and materials recovery located just south of the A2.	3.3	Storage and Distribution (B8)	Outside the built up area	None	Location surrounded by open countryside with some residential immediately to the north.	Minor	Low - set back from the A2 and reasonably well screened from the A2/neighbouring residential.	No other industrial uses in the immediate locality, and residential in close proximity.	Limited provision in Newington 1.0 kms. Nearest major offer Sittingbourne 6.5 kms.	Reasonable	Mostly open storage, layout appears uncoordinated. Sufficient space for parking and servicing.	Reasonable	M2 J5 in 6.8 kms. Immediate access to A2.	Reasonable
R11	Otterham Quay	 R11: Otterham Quay	Rural	A collection of warehouse buildings straddling the Borough boundary, mostly in Medway District. Just two industrial buildings in Swale.	4.4	Storage and Distribution (B8)	Outside the built up area	No recent planning activity. Some office to residential prior approvals locally, but not within the industrial buildings.	The site is wholly within FZ 3 and the Coastal Change Management Area, and adjacent to the SPA (Otterham Creek). Access to this rural creekside location is via narrow rural lanes, and dictates the size of service vehicles that can be used. Opposite a mobile home holiday park. The area within Medway is adjacent to an area of local landscape importance and an identified tidal flood area. Medway do not designate or allocate the industrial units for employment use.	Minor	Low - this is creekside in a rural location.	Low - there is boat yard activity, but also motor repair and the mobile home park on the opposite side of the creek.	Nothing in immediate vicinity. Nearest Rainham 3kms.	Poor	There is plenty of parking space, but servicing arrangements are not clear.	Reasonable	A2 1.9kms & M2 J4 in 8.6 kms (via Rainham).	Poor

1 BASIC INFORMATION Site ID.	2 Site name	20 *Local access by road* Site junction and quality of access to the principal road network	21 Score	22 *Public transport access* Is the site close to a railway station (within 400m)?	23 Station name, number of bus stops within a 400 m radius	24 Score	25 Vacancy	26 Vacancy Score	27 Other market intelligence e.g. market history, competing supply nearby, occupiers known to be moving in/out,	28 Score	29 REVIEW / RECOMMENDATION If the site retains its current use, will it be occupied?	30 Are there opportunities for redevelopment / intensification / extension?	31 Developable land (ha)	32 Are there any constraints on redevelopment / intensification / extension?	33 When are these constraint(s) likely to be resolved?	34 Recommend-ation
R4	Kent Science Park	Whilst the principal route is not far away the two alternative access links are via narrow rural roads, larger vehicles need to travel north into Sittingbourne to access the A2 and A249 to be able to reach the M2.	Poor	No	3	Poor	Some of the larger units. Specifically units which have specialist laboratory space.	Nil	The site has a mix of occupiers from a range of sectors. The KSP has a mix of unit types, but current vacancy is in more specialist units i.e. with laboratory space. There has been a continuous churn of occupiers in recent years, especially from office users. Office occupiers see the KSP as a higher quality alternative than the few purpose built office parks in the Borough.	Good	Yes	Opportunities within the Science Park envelope - to the north (approx.12.4 ha part occupied by Sittingbourne Football Club and a fitness centre), to the south (approx. 10.2 ha), and to the west 5.8 ha.	28.4	A small part of the northern parcel is within an 'area of high landscape value'. The western parcel is wholly within an 'area of high landscape value'. To the east the site is bound by an area of high landscape value and a local designated site of biodiversity.	Not in the Plan period	Safeguard
R5	Broadoak Enterprise Village	Whilst the principal route is not far away the two alternative access links are via narrow rural roads, larger vehicles need to travel north into Sittingbourne to access the A2 and A249 to be able to reach the M2.	Poor	No	3	Poor	None	Nil	Located close to KSP the site is currently occupied by a single company. Units are of mixed quality, but capable of reoccupation if current occupier vacates.	Reasonable	Hard to tell	No	n/a	Access and countryside policy are the key constraints.	Not in the Plan period	Safeguard
R8	Waterham Industrial Estate	Access via the High Street is narrow, but adequate to meet the relatively low level of use and the small number of large vehicles accessing the site.	Reasonable	No	3	Poor	None	Nil	Mix of newer and older units, but all are of reasonable quality. Units will be attractive to occupiers throughout the plan period.	Good	Yes	Yes, land on either side of the existing site (this area is identified as Area of Search 5), and potentially some small scale intensification of the existing site.	n/a	The current policy position (DM24 in particular) limits the scope for development in the countryside.	Available in the Plan period	Safeguard
R9	Spade Lane Coldstore	Good dedicated junction on A2. But link to M2 J4 is via Gillingham.	Reasonable	No	0	Very Poor	None	Nil	The site is occupied by multiple tenants. In the large warehouse the site is shared by a produce company and a logistics company (Inter automotive Interiors). The smaller workshops to the south have multiple tenants. The site may have limited attraction for alternative employment uses due to remoteness and access issues. However, the site offers opportunity for the future expansion of the existing main logistics use should that be needed.	Reasonable	Yes	Yes, but only for the expansion of the existing logistics business on to land to the rear that is occupied by car repair businesses, and the land beyond that. See Call for sites reference: SBC17/095.	n/a	The current policy position (DM24 in particular) limits the scope for development in the countryside.	Available in the Plan period	Safeguard
R10	Newington Industrial Estate	Reasonable junction access on to A2. Need to pass through a number of settlements on A2 on route to A249.	Reasonable	No	6	Reasonable	None	Nil	There is currently no vacancy and the site is well suited to construction related industries, an largely open storage. If multiple occupiers vacant and the market weakens then the rural nature will mean that the site will struggle to be re-let. On the other hand, the space is fully let and there could be more demand than is being met.	Reasonable	Yes	There remains a local market of low cost open storage facilities, and possibly further demand for expansion of existing or entry of a limited number of new occupiers. Redevelopment for other uses unlikely given neighbouring residential and isolation of the site from other industrial uses.	n/a	Policies controlling development in the open countryside.	Not in the Plan period	Safeguard
R11	Otterham Quay	Poor - the road access to the Quay is very narrow rural lanes.	Poor	No	12	Reasonable	None	Nil	There are a number of buildings within the estate. There is a single large modern building that is in good condition, and a number of smaller dated units which appear to be coming to the end of their economic life. Should units on the estate become vacant it may be difficult to re-let due to the remote location and relatively poor access. Residential development is proposed on the site, that if implemented would make the remainder of the site far less attractive to potential occupiers.	Poor	Hard to tell	No	n/a	Yes, the road access. The poor access arrangements for large vehicles would preclude this site from being used other than for specialist marine related activity.	Not in the Plan period	Allow managed release

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19
BASIC INFORMATION									CONSTRAINTS		ATTRACTIVENESS TO OCCUPIERS							
											External environment				*Internal environment*		*Strategic accessibility (road)*	
Site ID.	Site name	Site location map	Market area	Site description	Site area (ha)	Primary type of employ-ment	Site's sequential location	Current relevant planning	Detail any constraint(s)	Bad neighbour impact	Prominence of site	Compatibility with surrounding uses	Access to amenities (nearest centre km)	Score	Layout, parking, servicing, landscaping etc.	Score	Proximity to Mway/ principal roads [kms]	Score
R12	Coolchain Depot, Teynham	 R12: Coolchain Depot, Teynham	Rural	A food storage and distribution warehouse on the A2 near Teynham. The site is operated by Iss Fowler Welch.	7.5	Storage and Distribution (B8)	Outside the built up area	None	Site backs onto open countryside.	None	Middling - on the busy A2, but not at a junction	Middling - there are some other industrial and commercial activity in the vicinity, as well as residential.	Teynham 1kms, Sittingbourne 3.5kms.	Reasonable	The building is set back a little from the road to allow for a soft landscape screen, parking and servicing are extremely well organised.	Excellent	M2 J5 in 10 kms (via A2 & A249).	Reasonable
R13	Former Funton Brickworks, Raspberry Hill Lane	 R13: Former Funton Brickworks	Rural	Former brick works, now redundant land in an isolated rural location to the east of Iwade.	7	Other	Outside the built up area	2015 application for dwellings refused.	The area sits within an 'Area of high landscape value' (Swale Level), and is bordered to the north-east by the 'Coastal Change Management Area'; 'Area of high landscape value (Kent Level)'; and ' International & national designated area of biodiversity &/or geological value. The remaining brick kilns on site may be considered heritage assets.	None	Low - in the countryside.	Low - no other employment uses nearby.	Iwade 3.5kms. Sittingbourne 8.5kms	Very poor	Possible contamination.	Poor	M2 J5 in 11.5 kms (via minor roads & A249).	Reasonable
R14	Hengist Field, Borden	 R14: Hengist Field, Borden	Rural	Small scale office in a rural setting.	1.4	Office (B1a)	Outside the built up area	None	Development in the countryside policies. Offices generally compatible with neighbouring residential.	Minor	Low - in the countryside.	Low - no other employment uses nearby.	Sittingbourne 4kms.	Poor	Well laid out site with good soft landscape screening and adequate on-site parking and servicing space.	Excellent	M2 J5 in 3kms (via minor roads through Oad Street & A249).	Excellent
R15	Lamberhurst Farm	 R15: Lamberhurst Farm	Rural	Former farm buildings now used for storage and distribution of material supplies, workshops for motor repair and MOTs and some limited vehicle open storage. The site is remote an accessed via a narrow country lane. (the site is within Area of Search 5)	2.3	Mixed B uses	Outside the built up area	None	Access via narrow rural lanes & located in open countryside with the Swale Level Area of high landscape value immediately to the south.	None	Low - in the countryside.	Low - no other employment uses nearby.	Limited provision 1.0 kms Highstreet. Whitstable 6kms.	Poor	Poor - unplanned former agricultural buildings without clear parking and servicing areas and no internal landscaping.	Poor	A299 (becomes the M2) 0.8kms (via minor roads).	Excellent
R16	A2 Dunkirk 1 & 2	 R16: Dunkirk Industrial Estate	Rural	Two small industrial estates, both with a mix of activity. The main activity appears to be distribution.	1.3	Storage and Distribution (B8)	Outside the built up area	None	Site limitations in the case of the most eastward site, and development in countryside/small settlements for both. Residential also neighbouring in both cases.	Minor	Low - in the countryside.	Middling - some employment uses nearby, and wide range of activity in Dunkirk village in addition to residential.	Limited provision in Boughton 1.5 kms, and Canterbury 7kms.	Poor	Sites have grown incrementally, but have managed parking and servicing - per individual site in the case of the area furthest east, and largely collectively in the case of the area to the west (Dunkirk Industrial Park)	Reasonable	M2 J7 4.2kms (via minor roads).	Excellent

1	2	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34
BASIC INFORMATION		Local access by road		Public transport access							REVIEW / RECOMMENDATION					
Site ID.	Site name	Site junction and quality of access to the principal road network	Score	Is the site close to a railway station (within 400m)?	Station name, number of bus stops within a 400 m radius	Score	Vacancy	Vacancy Score	Other market intelligence e.g. market history, competing supply nearby, occupiers known to be moving in/out,	Score	If the site retains its current use, will it be occupied?	Are there opportunities for redevelopment / intensification / extension?	Developable land (ha)	Are there any constraints on redevelopment / intensification / extension?	When are these constraint(s) likely to be resolved?	Recommend-ation
R12	Coolchain Depot, Teynham	Good access arrangements on the A2, but to access M2 requires either passing through Sittingbourne or around Faversham.	Reasonable	No	6	Reasonable	None	Nil	Existing industrial unit is a modern purpose built facility, with the current occupier suited to the rural location. Due to the rural location the unit may struggle to be re-occupied should Fowler Welch vacate . We think despite rural location unit may be reoccupied.	Good	Yes	No	n/a	The current policy position (DM24 in particular) limits the scope for development in the countryside.	Available in the Plan period	Safeguard
R13	Former Funton Brickworks, Raspberry Hill Lane	Raspberry Hill Lane and the other minor roads needed to link to the A249 (at Iwade or Bobbing) is very narrow.	Very poor	no	0	Very poor	Whole site is vacant	100%	None known	Don't Know	No	Not for general forms of employment use, because too remote.	n/a	Albeit that the former brick works will have been serviced by large vehicles, these are likely to have been of low volume. Access via the narrow country lanes is a major constraint.	Not in the Plan period	Allow managed release
R14	Hengist Field, Borden	Access is onto a narrow country lane, and the route to the M2 J5 passes through Oad Street village. However, as the traffic is predominantly cars, this is a suitable route.	Reasonable	No	6	Reasonable	Some medium sized units (up to 420 sq m) currently available.	Middling	Modern units of reasonable quality, but they are located to far from local amenities which is a requirement of many office occupiers. It is likely that vacant units will have long voids. The offices will compete with other office parks like Conqueror Court which are closer to town centre amenities and the A249.	Reasonable	Yes	No	n/a	Development impact on the countryside policies. The poor quality of the road access.	Not in the Plan period	Safeguard
R15	Lamberhurst Farm	The access roads are very narrow country lanes.	Poor	No	0	Very Poor	None	Nil	Low quality units only suitable for storage or local car mechanics.	Poor	Likely	Yes, but limited to intensification or small scale expansion because of the constraints. (refer to Area of search 5 assessment)	n/a	The current policy position (DM24 in particular) limits the scope for development in the countryside, particularly here where it is adjacent to the locally designated area of high landscape value. Plus the poor access constraints.	Available in the Plan period	Safeguard
R16	A2 Dunkirk 1 & 2	The 3.5 km route - Canterbury Road to theM2 J7 is narrow in places and goes through settlements.	Poor	No	9	Reasonable	None	Nil	Units are of a reasonable quality and will be likely to be taken up if current occupies re-locate. Due to the rural location the units may struggle to be re-occupied should the market weaken.	Reasonable	Likely	No	n/a	Development in the countryside / rural settlements. Neighbouring residential.	Not in the Plan period	Safeguard

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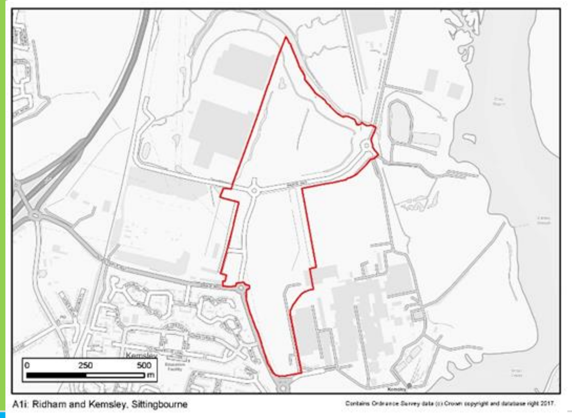
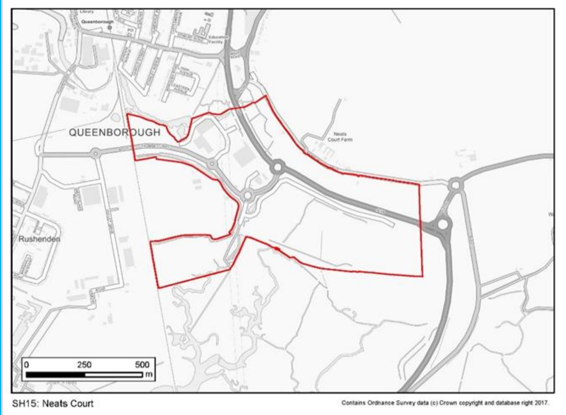
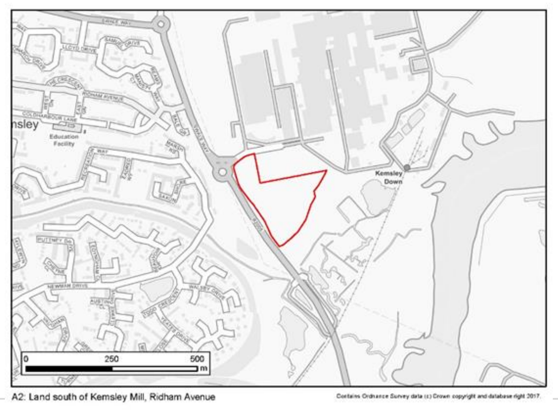
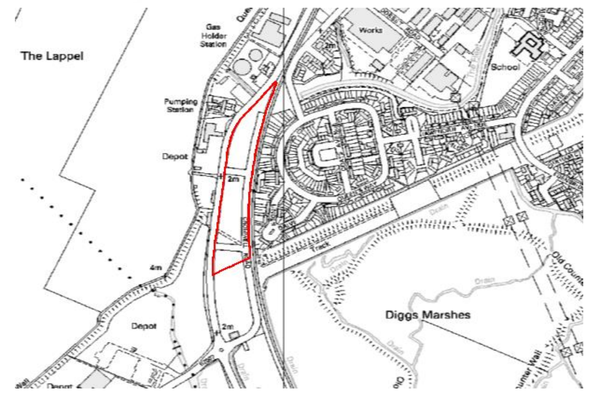
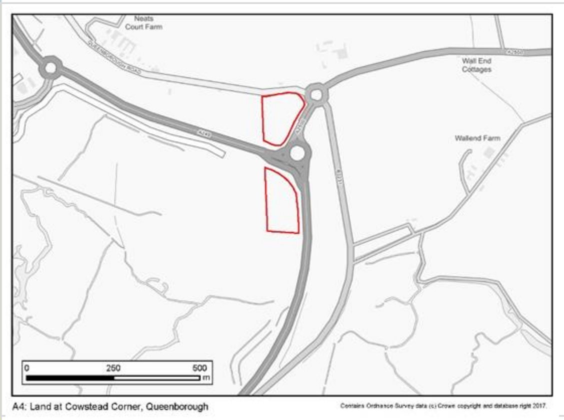
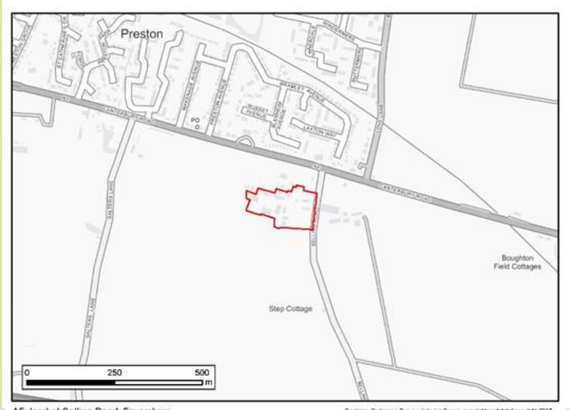
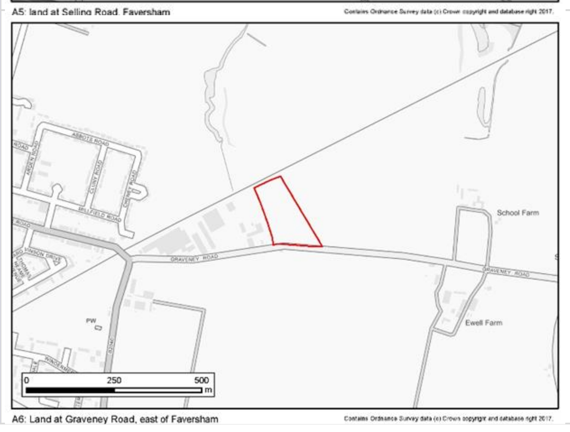
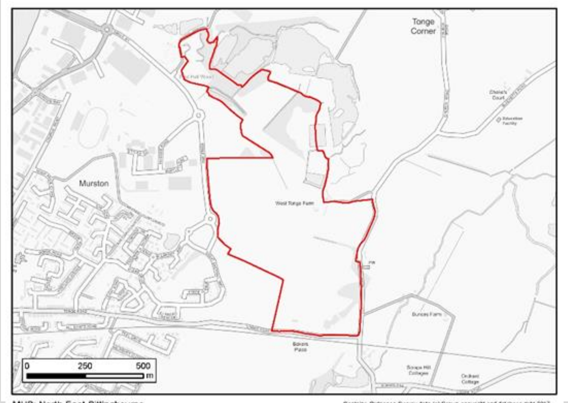
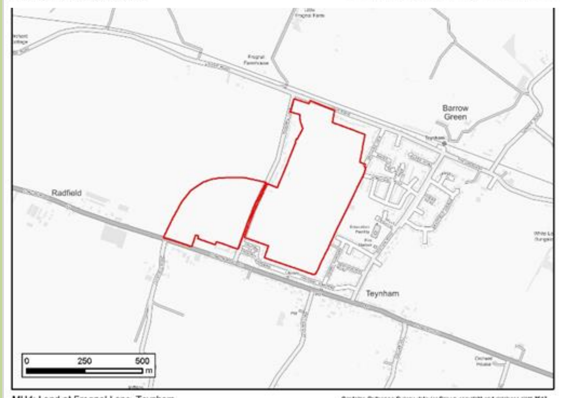
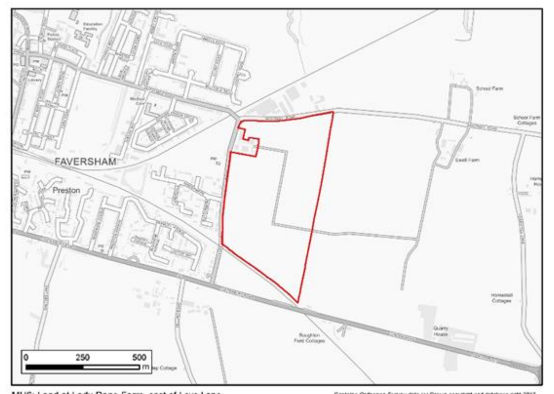
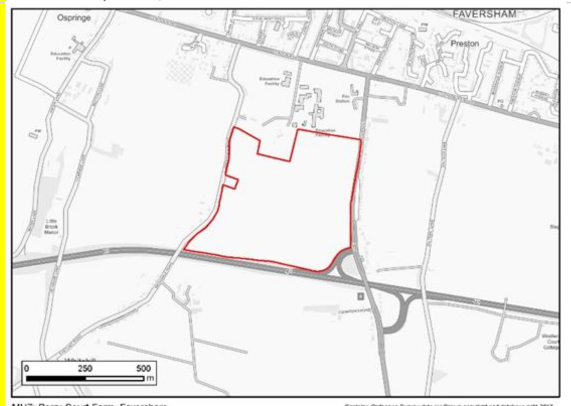
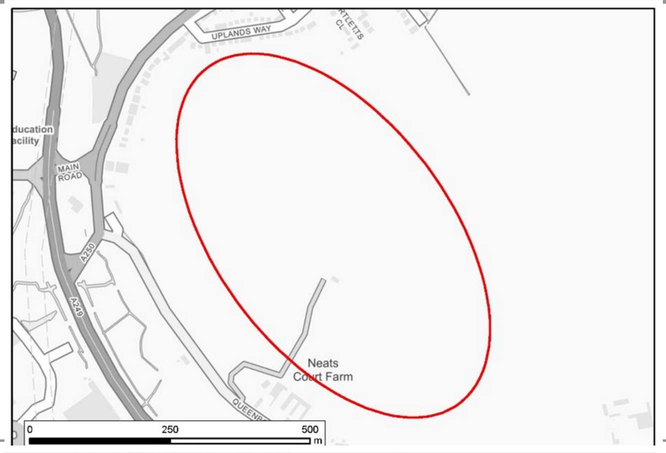
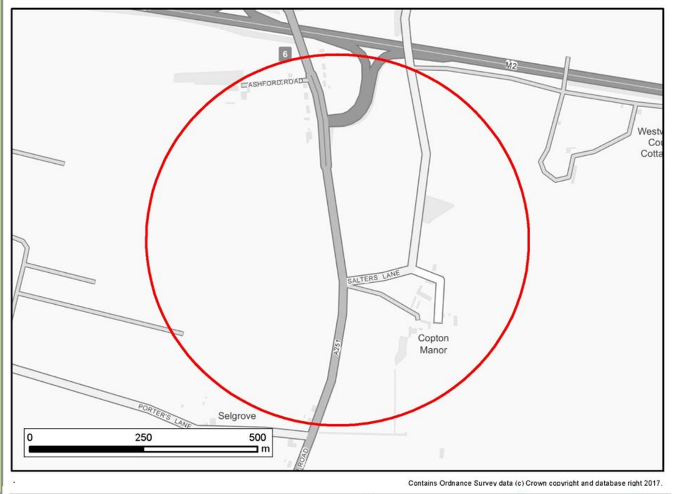
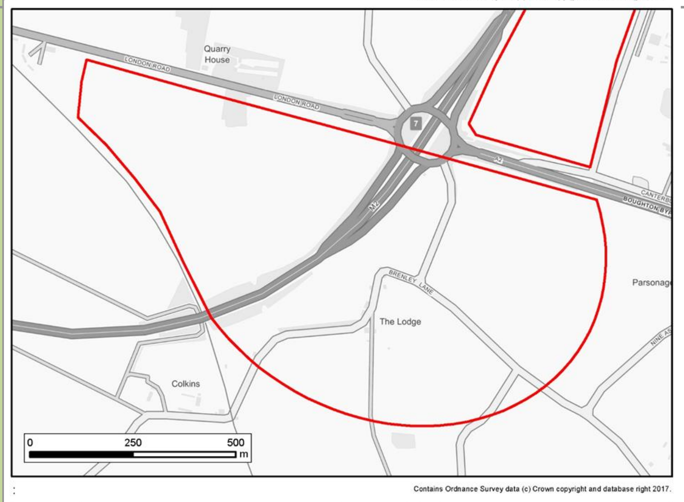
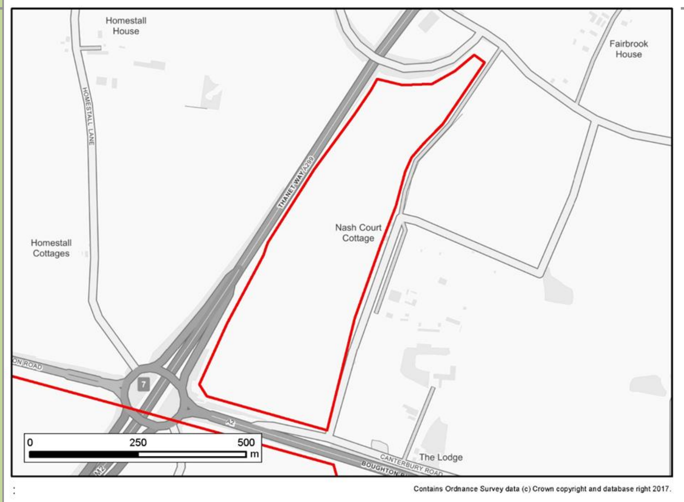
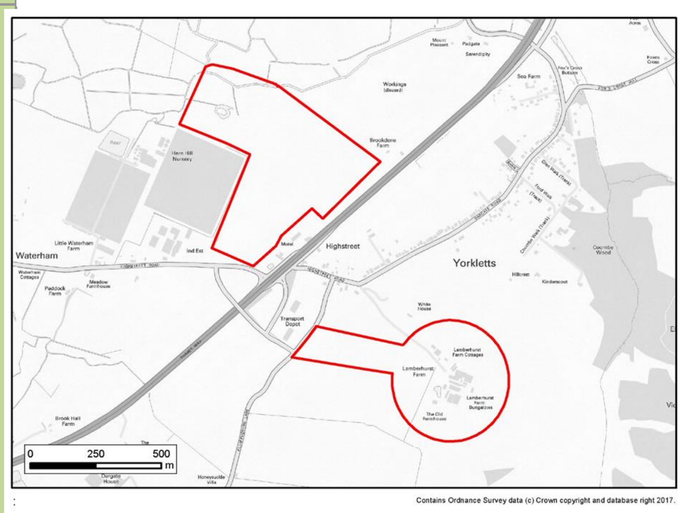
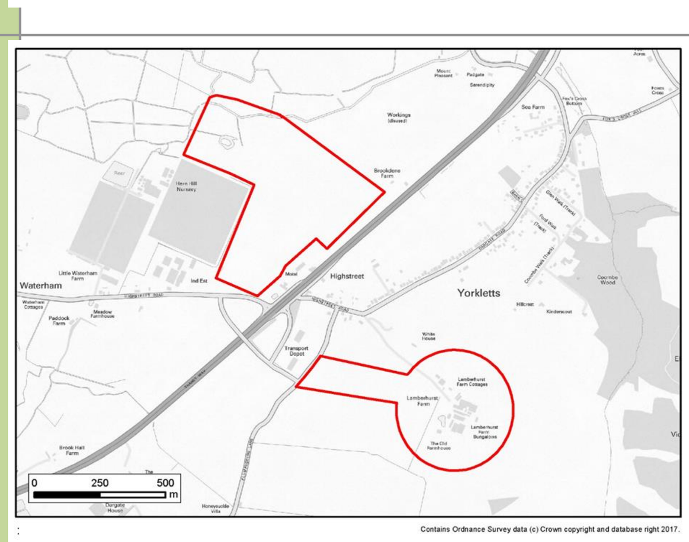
1 Site ID.	2 BASIC INFORMATION Site name	3 Site location map	4 Market area	5 Site description	6 Current use	7 Is the site previously developed land?	8 Site area (ha)	9 Develop-able area for Emplt (ha)	10 Site's sequential location	11 Primary type of employ-ment	12 Office / Industrial	13 Proposed principle use	14 Any planning designations	15 Planning History	16 CONSTRAINTS Detail any constraint(s) to delivery of whole or part of site? (inc. physical and policy)	17 Overall constraints?	18 Is this site available?
A1i	Ridham and Kemsley, Sittingbourne		Sittingbourne	Large greenfield site transected by Barge Way effectively dividing the site into two parcels, both of which have access provided off roundabouts on Barge Way. The neighbouring activities are a mix of heavy industrial (paper recycling), regional distribution and some light industrial in the Kemsley Fields Business Park. Rail head link to the Docks.	Vacant development plots	No	41.9	36.3	Within the built up area	Mixed B uses	Industrial	Site allocated for 149,200 sq m industrial - B2 and B8 uses (@40% plot ratio = 37ha). KCC monitoring identifies potential for circa 145,000 sq m. The site is particularly suited for B8. Probable reduction in developable area (area measures 41.9, but 37 ha for development) on account of pylons/cables crossing site.	Area of High Landscape Value (Kent Level) bordering the northern part of the site. The site sits within the 'built up area boundary'	Development brief identifies 149,200 sq m available for B class development. On the west side of Barge Way, there is extant planning permission for 2,534sqm for a thermal conversion and energy generation plant.	The need to protect the nearby habitat could have an impact on the type and intensity of use. However, the site is wedged between existing large and/or heavy industrial uses. Southern end of site is crossed by pylons / power lines could reduce the developable area.	Minor	Immediately available
A1ii (also SH15)	Neatscourt		Sheerness	Greenfield site overlapping the A249 that has been part developed (see allocation sheet for review of undeveloped parcels). The whole allocation measures 53.7 ha (inclusive of the road network within it), but the Morrison and leisure development and the under-construction Aldi distribution warehouse account for all but approximately 19ha.	Retail park, retail distribution and vacant development plots	No	53.7	19	Adjacent to the built up area	Other	Industrial	Industrial uses	The area is within FZs 2 & 3 and a proposed regeneration area. No nature designations on the site. However, to the south the site is bordered by an 'Area of High Landscape Value', 'coastal change management area', and 'international and national designated site of biodiversity and geological nature'.	Application for a new manufacturing and distribution facility for Medichem (5,196 sq m of B1, B2 and B8) on land to the north of the A249 (northern-most parcel).	None on the site directly. To the south the site is bordered by an 'Area of High Landscape Value', 'coastal change management area', and 'international and national designated site of biodiversity and geological nature'.	Minor	Yes
A2	Land south of Kemsley Mill, Ridham Avenue		Sittingbourne	Open land off Swale Way immediately to the south of the Paper Mill.	Former grazing land, now not in productive use.	No	3.3	3.3	Adjacent to built up area	Mixed B uses	Industrial	3.3ha site is allocated (Policy A2) for B class uses, and Local Plan considers sufficient to accommodate 8,000 sq m.	A small section of the southern half of the site is designated as 'coastal change management area', with a 'local designated site of biodiversity' within the site to the far north east corner. The site is within the built up area boundary.	Outline planning permission (14/500327/OUT) exists on site for 'up to 8000sqm of B1 and B2 space'.	Albeit that the site backs onto a large heavy industrial site, and could to some extent buffer the impact of that activity, there are designated landscape and heritage sensitive areas that will constrain the massing possibilities on the site.	Minor	Immediately available
A3 (and SH8)	Land at West Minster		Sheerness	A narrow strip of vacant land split into two parcels by Newland Road which bisects the site. Cromwell Road that marks the eastern boundary does not connect with A249 at its northern end. The site has been allocated for many years, but hasn't progressed, and in response to its potential landscape, biodiversity and archaeological impacts the site has been reduced in scale to include only the most northerly 2.5ha.	vacant land	No	2.5	2.5	Within the built up area	Mixed B uses	Industrial	The size of the site has been reduced in scale (from 6.5 to 2.5ha) to reflect landscape, biodiversity and archaeological impact concerns. Local Plan allocation of 2.5 ha will deliver 7,500 sq m B class.	Area of High Landscape Value (North Kent Marshes) covers the southern and middle part of the site. Only the northern part is undesignated and within the built up area boundary.	2015 permission for 7,650sqm of B1 and B8 use.	Residential to the east of the northern parcel. This, like large parts of the Isle of Sheppey is within FZ3.	Major	Available in the plan period
A4	Land at Cowstead Corner, Queenborough		Sheerness	Two separate parcels of open land off the A249, immediately to the east of the new Aldi regional distribution unit.	Former agricultural land, now not in productive use.	No	2.8	1.6	Within the built up area	Mixed B uses	Industrial	The southern parcel (1.6ha) is suitable for a 'modest' extension of the Neatscourt employment area of circa 5,600 sq m B class use. The northern parcel (1.36ha) is identified as potentially suitable for an hotel.	The site is an employment allocation, with a proposed regeneration area bordering both sites western edge. The southern site is also bordered to the south by an 'Area of high landscape value'.	No extant planning permissions.	No specific constraints, other than the southern parcel is relatively small.	Minor	Immediately available
A5	land at Selling Road, Faversham		Faversham	Land and farm buildings situated on the western side of Selling Road, and to the south of the new leisure premises fronting the A2.	vacant/under-utilised buildings	Yes	1.8	1.8	Adjacent to the built up area	Mixed B uses	Industrial	Allocation A5 - 6,300 sq m of B class. Achieved by reusing the existing buildings on site plus limited new build.	Site is mostly within the Brickearth minerals area, but no landscape designations specifically on the site. However, the site is outside the built-up area boundary and backs onto open countryside, and is not far from the Kent Level AHLV, and therefore inter alia Policy D24 (conserving & enhancing valued landscapes) applies.	No extant planning permissions on site.	The pair of Oast Houses on site are listed, which together with the semi-rural location and the adjacent listed Macknade Manor House constitute major constraints.	Major	Immediately available
A6	Land at Graveney Road, east of Faversham		Faversham	Farmland adjacent to commercial and employment uses to the west with open countryside to the east.	agriculture	No	2.0	2.0	Adjacent to the built up area	Mixed B uses	Industrial	Local Plan allocation A6 identifies the site as suitable for 7,000 sq m of B1 and/or B8 floorspace, or possibly B2.	The site is allocated for employment use (A6). North boundary touches the local designated site of biodiversity. Western boundary touches mixed use allocation.	No extant planning permissions on site.	The site is raised compared to the open countryside to the east. The site is within a minerals safeguarding area, and assessment and possibly extraction may need to be carried out prior to release for development. Access improvements needed to Graveney Rd.	Minor	Available in the plan period

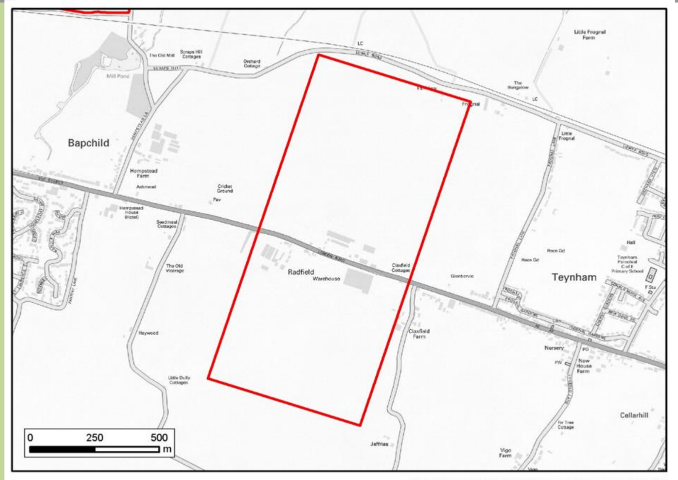
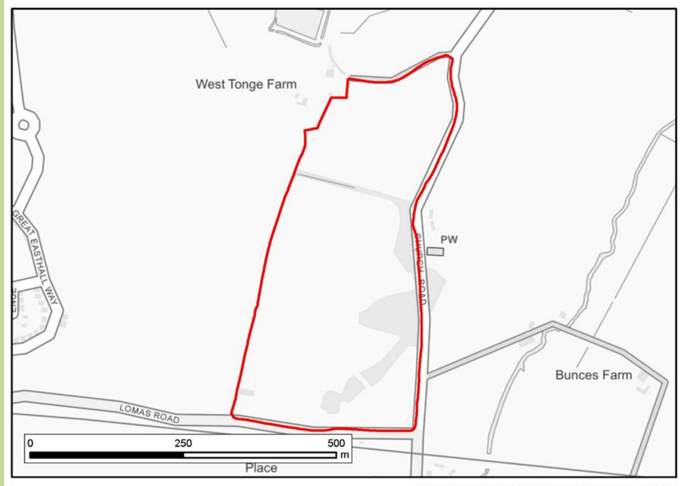
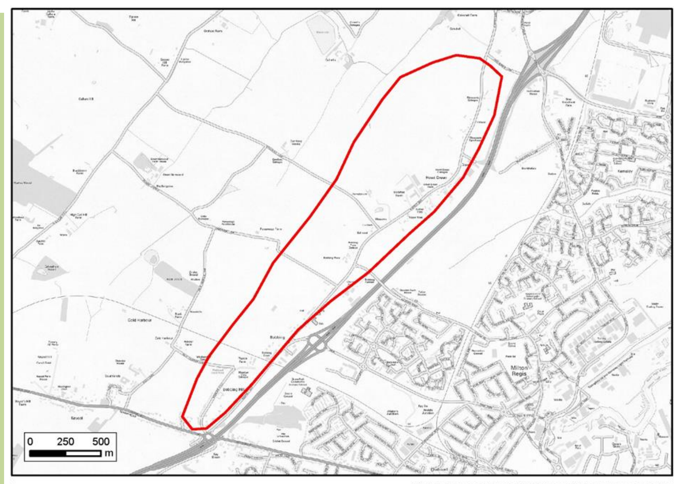
1	2	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38
BASIC INFORMATION		ATTRACTIVENESS TO OCCUPIERS																REVIEW / RECOMMENDATION			
		External environment				*Internal environment*		*Strategic accessibility (road*		*Local access by road*		*Public transport access*			*Market Signals*			Overall Review			
Site ID.	**Site name**	**Prominence of site**	**Compatibility of surrounding uses**	**Access to amenities**	**Score**	**Any problems with shape, gradient, boundary etc.?**	**Score**	**Proximity to Mway/principal roads (kms)**	**Score**	**Site junction and quality of access to the principal road network**	**Score**	**Is the site close to a railway station (within 400m)?**	**Station name & number of bus stops**	**Score**	**Evidence of developer / occupier interest?**	**Other market intelligence e.g. market history (how long on the mkt), competing supply nearby, occupiers known to be moving in/out.**	**Score**	**Is the site likely to be attractive to employment occupiers?**	**Is the site suitable for the assessed use?**	**Assuming constraints are resolved, what are the prospects of the site being developed and occupied?**	**Recommend-ation**
A1i	Ridham and Kemsley, Sittingbourne	Middling - not on or visible from the A249, but prominently located on roundabouts on link road.	High - neighbouring uses are large scale distribution and heavy industrial activities.	Nothing in immediate vicinity.	Reasonable	No	Excellent	A249 1.6 kms via Swale Way, and J5 M2 8.6kms (via A249).	Good	Site(s) have access provided off the roundabout junctions, and the link road to the A249 (Swale Way) is recent new purpose built high quality infrastructure.	Excellent	No	0	Very poor	Agents report there has been some recent interest from occupiers	The site is currently being marketed for B8/B2 uses. The site is well located next to existing B8 space. There are limited competing sites that are cleared and ready to be developed. The site will likely be developed for B8 distribution within the plan period.	Good	Yes	Yes	High - good location for warehousing and/or general industrial uses.	Retain
A1ii (also SH15)	Neatscourt	Excellent - directly on the A249. A particularly good location for logistics and distribution, but also for manufacturing requiring high visibility.	Good - backs on to industrial / open storage uses and retail/leisure to the north. Open farmland to the south and east.	Immediate access to Morrisons superstore and leisure activity, and Queenborough 1kms.	Excellent	Part developed area provides modern infrastructure needs associated with a large distribution facility and other commercial/retail activity. The shape of some of the remaining allocated land is narrow, and may restrict some uses.	Excellent	J5 M2 13kms (via A249).	Excellent	Excellent - immediate access onto the A249.	Excellent	No	6	Reasonable	n/a	Currently being marketed for mixed use housing and employment. Some of the allocation to the north has been lost to retail development. To the east of the allocation Aldi have recently developed a 600,000 sqft regional distribution centre. Given the site connectivity, prominence and reduced site area the balance of the site is likely to be developed within the plan period.	Good	Yes	Yes	High - good location for warehousing and/or general industrial uses.	Retain
A2	Land south of Kemsley Mill, Ridham Avenue	High - with direct access and visibility from Swale Way.	High - neighbouring uses are large scale distribution and heavy industrial activities.	Nothing in immediate vicinity.	Reasonable	The site slopes down from north to south, but unlike neighbouring areas is not crossed by pylons.	Reasonable	A249 1.4 kms via Swale Way, and J5 M2 8.4kms (via A249).	Good	The site has a ready constructed access spur off the Swale Way. The link road to the A249 (Swale Way) is recent new purpose built high quality infrastructure.	Excellent	No	3	Poor	Currently under offer	Currently being marketed for general industrial. Plans are for units of a higher quality than other estates in Sittingbourne. Site is well located and would be suitable for B2 and B8 occupiers.	Good	Yes	Yes	High - good location for warehousing and/or general industrial uses.	Retain
A3 (and SH8)	Land at West Minster	High - because of its location on the A249.	Industry and open car storage to the west, but residential to the east.	Queenborough 1.9kms.	Poor	The land is a narrow wedge of land between two roads and backs on to the railway line.		J5 M2 16kms (via A249).	Reasona ble	Direct access via Cromwell Road off a roundabout on A249.	Excellent	No	6	Reasonable	Sold subject to contract and planning consent	The site has a 2015 outline permission for B2 and B8 uses. Despite the narrow and elongated nature of the site which may deter a single large occupier the site could be suitable to multiple smaller occupiers. Given the tight nature of the market for smaller units the site is likely to bee developed over the plan period.	Good	Yes	Yes	High - the site's excellent access to the A249 and is largely unconstrained, albeit it narrows significantly to the north and has floodrisk issues (in common with most of Sheerness/Sheppey), make it an attractive site for industrial uses.	Retain
A4	Land at Cowstead Corner, Queenborough	Excellent - given both parcels are located on the A249 / A2500 roundabout junction.	Middling - large scale distribution and site allocated for employment use immediately to the west, but otherwise farmland.	Morrisons' Neatscourt retail and leisure development 1.1 km away.	Reasonable	None, other than two relatively small parcels.	Good	J5 M2 12.5kms (via A249 that is immediately accessible).	Excellent	Excellent direct access to the A249. But access may need to be taken in both cases through the development land to the west.	Excellent	No	0	Very poor	n/a	Located adjacent to Neat's Court allocation, which has recently benefited from the Aldi development. The allocations are well located and will likely be developed alongside Neat's Court.	Good	Yes	Yes	High - good location for warehousing and/or general industrial uses.	Retain
A5	land at Selling Road, Faversham	Low, semi-rural location accessed via a country lane.	Restaurant in a Grade 2 listed Manor House and country stores adjacent with open countryside to the south.	Town centre 2kms	Poor	The listed Oast Houses and the ecological and archaeological issues on site need to be respected.	Poor	J6 M2 2.0kms (via Canterbury Road & A251).	Excellent	Access road to A2 would need upgrading if large vehicles were to use the site, but site is close to A2.	Reasonabl e	No	18	Reasonable	n/a	The site is currently occupied by employment uses. Development has occurred north of the site for pub/restaurant use. Site is currently occupied at low intensity. Within a wider area being promoted for garden village development.	Reasonable	Yes	Yes	Good for niche / specialist B class rural offices/workshop type use.	Retain
A6	Land at Graveney Road, east of Faversham	Low - Graveney Road, but this is a minor route.	Buffered by railway line and existing country store, and would need landscaping on eastern side where site meets open farmland.	None immediate. Town centre 1.6kms.	Poor	The site slopes down towards the open countryside, which will make any development more conspicuous.	Poor	Site equidistance from M2 Js6 &7. J6 M2 3.2kms, & J7 2.8kms.	Excellent	The route to the M2 (Graveney Rd, Love Lane, Canterbury Rd and A251) is narrow in places and Love Lane in particular is not suited to large vehicles, and would require widening.	Reasonabl e	No	0	Very poor	n/a	Currently not being marketed. It is located away from existing employment areas, and the connectivity is poor. The site is not in the optimum location for B class development.	Poor	Yes	Yes	Reasonable - the site is not in the optimum location, if small industrial units were developed there is enough demand to absorb the supply.	Retain

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
BASIC INFORMATION															CONSTRAINTS		
Site ID.	Site name	Site location map	Market area	Site description	Current use	Is the site previously developed land?	Site area (ha)	Develop-able area for Emplt (ha)	Site's sequential location	Primary type of employ-ment	Office / Industrial	Proposed principle use	Any planning designations	Planning History	Detail any constraint(s) to delivery of whole or part of site? (inc. physical and policy)	Overall constraints?	Is this site available?
MU2	North East Sittingbourne (Eurolink P5)	 MU2: North East Sittingbourne	Sittingbourne	The area identified for employment in the middle of the site is former farmland abutting the northern & eastern extent of Eurolink.	agriculture	No	51.1	11.6	Within the built up area	Mixed B uses	Industrial	Local Plan development concept shows employment uses in the central area, and housing in the south. The northern area is identified for strategic open space / landscaping as the Swale Special Protection Area & Area of High Landscape Value wash over and abut this area.	Designated as 'proposed mixed use', with designated 'safeguarded area of search for Sittingbourne Northern relief road' cutting through and covering the southern half of the site. A small area at the very northern edge of the site is within the Kent Level Area of High Landscape Value, and the area abuts the SPA - international and national designated site of biodiversity &/or geological value.	2016 planning permission for up to 46,600sqm B1, B2 and B8 (on the western part of the allocation). The Local Plan designation MU2 identifies scope for 43,000 sq m on 11.6 ha.	The key constraint on the opportunity for future development is the SPA located immediately to the north, and this is why the concept plan identifies habitat and open space use for the northern area. The area identified for employment is in the central part of the allocated land, and is buffered from the sensitive landscape by the open space uses to the north.	Minor	Immediately available
MU4	Land at Frognal Lane, Teynham	 MU4: Land at Frognal Lane, Teynham	Rural	Greenfield site on the edge of Teynham village / A2. In this part of the A2 corridor between Sittingbourne and Faversham there are some logistics warehouses associated with agri/food, but no large general industrial estates.	agriculture & open space	No	30.6	8.2	Within the built up area	Mixed B uses	Industrial	The Local Plan development concept is for a mixed use scheme including 26,840 sq m of commercial campus style B class employment uses located on the rear of the site.	The site is designated as a 'proposed mixed use allocation'. The western section of the site (west of Frognal Lane) is outside the built up area boundary.	Undetermined 2016 planning application for mixed use scheme including 26,840 sq m B1 use.	The site identified for employment uses is in close proximity to existing residential.	Minor	Immediately available
MU6	Land at Lady Dane Farm, east of Love Lane	 MU6: Land at Lady Dane Farm, east of Love Lane	Faversham	Farmland abutting the eastern edge of Faversham.	agriculture	No	26.6	5.0	Within the built up area	B1	Office	The Local Plan development concept identifies scope for 20,000 sq m of office space on a 5 ha area forming an office park environment. Delivery requires improved infrastructure, and specifically a new access road link to the A2 and local junction improvements.	The site is designated as a 'proposed mixed use allocation', is within the built up area boundary, and the brickearth safeguarded area washes across most of the area, but there are no landscape designations.	2016 planning permission for mixed use including 2,000sqm of B1a and 5,385sqm of B1c.	No specific on-site constraints, but to the west of Love Lane is the Faversham Conservation Area, and a Local Area of Biodiversity lies to the north of the railway line.	Minor	Immediately available
MU7	Perry Court Farm, Faversham	 MU7: Perry Court Farm, Faversham	Faversham	A large site located between the A2 and M2, and adjacent to J6 of the M2.	agriculture	No	30.3	5.0	Within the built up area	B1	Office	The Local Plan development concept seeks 3Ha (18,525sq m) of B1 space, with a further 2 Ha safeguarded for possible further B1 class use. As identified in the outline permission (15/504264), office should comprise the majority element of the mix.	There are no landscape or other such designations relating to the land, but the land south of the M2 is Kent Downs AONB and the Kent Level Area of High Landscape Value.	2017 outline planning permission for mixed us, including 11,875sqm of B1a, 3,800sqm of B1b, and 2,850sqm of B1c. Reserved matters application submitted, but only for residential element.	Potential impact on the setting of the AONB and SPA.	Minor	Immediately available

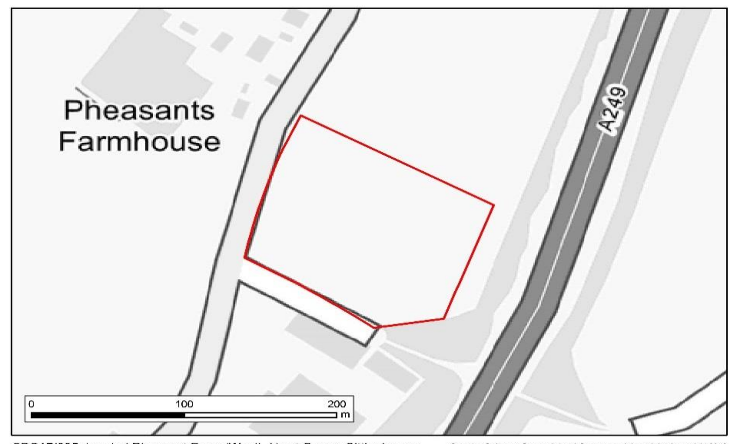
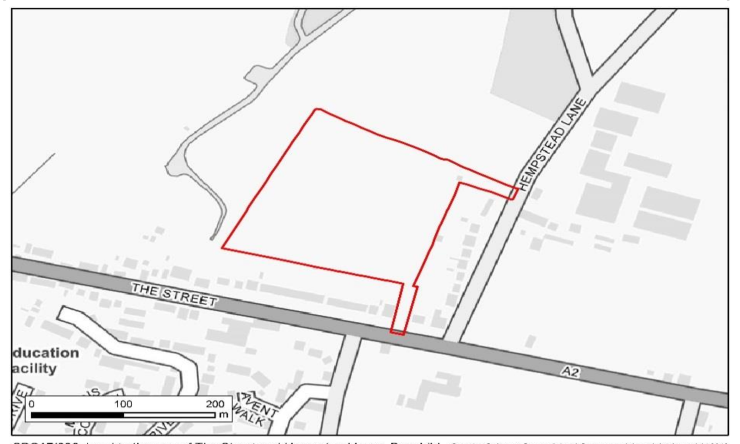
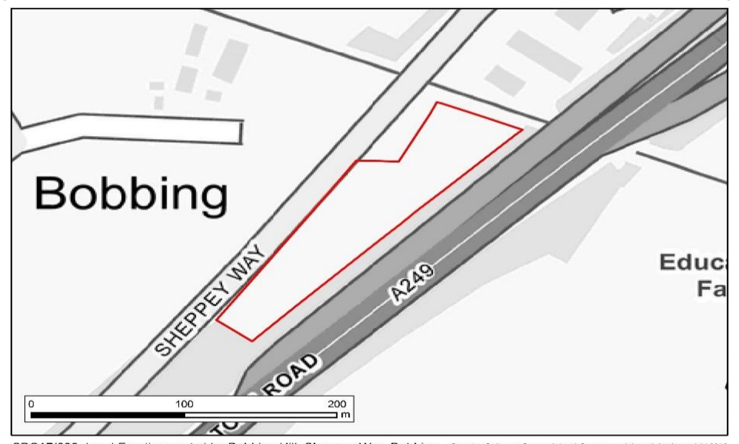
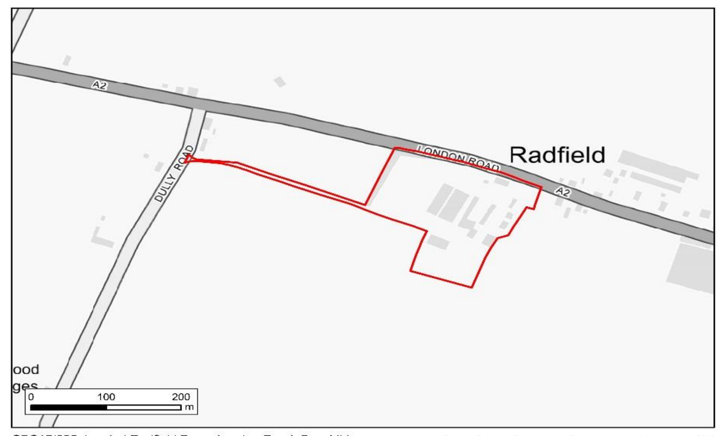
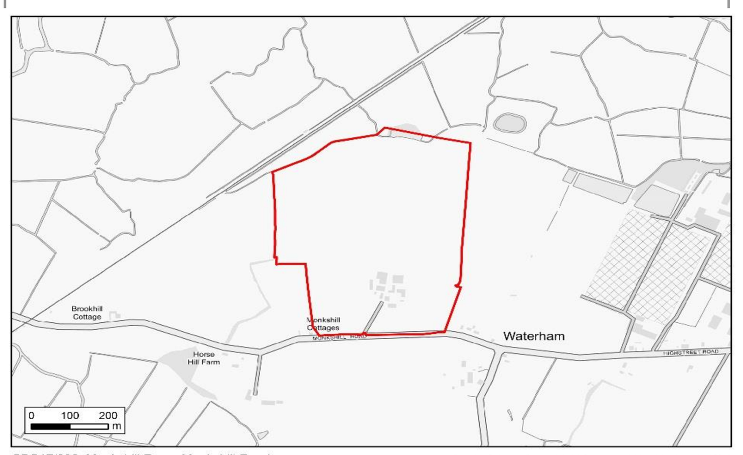
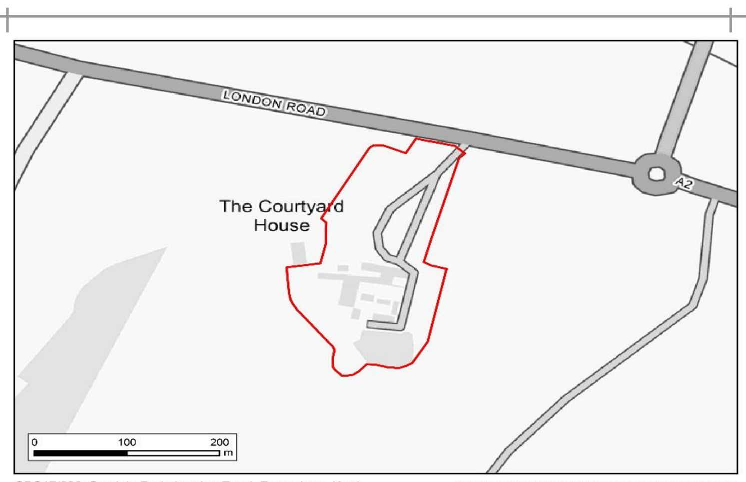
1 BASIC INFORMATION Site ID.	2 Site name	19 ATTRACTIVENESS TO OCCUPIERS *External environment* Prominence of site	20 Compatibility of surrounding uses	21 Access to amenities	22 Score	23 *Internal environment* Any problems with shape, gradient, boundary etc.?	24 Score	25 *Strategic accessibility (road* Proximity to Mway/principal roads (kms)	26 Score	27 *Local access by road* Site junction and quality of access to the principal road network	28 Score	29 *Public transport access* Is the site close to a railway station (within 400m)?	30 Station name & number of bus stops	31 Score	32 *Market Signals* Evidence of developer / occupier interest?	33 Other market intelligence e.g. market history (how long on the mkt), competing supply nearby, occupiers known to be moving in/out.	34 Score	35 REVIEW / RECOMMENDATION Overall Review Is the site likely to be attractive to employment occupiers?	36 Is the site suitable for the assessed use?	37 Assuming constraints are resolved, what are the prospects of the site being developed and occupied?	38 Recommend-ation
MU2	North East Sittingbourne (Eurolink P5)	High - this is the principle industrial area in the Borough.	Excellent - this is an expansion of the existing Eurolink.	Generally poor - very limited provision in Murston (1.3kms). Town centre 2 kms.	Good	None	Excellent	J5 M2 11km, via A249 (via Swale Way) 4km. A longer distance than via the A2, but a better quality / appropriate route.	Good	Swale Way and the A249 is a route suitable for heavy goods vehicles.	Good	No	0	Very poor	Phase 5 underway with most of the plots pre-let.	With four previous phases of development this is in an area that has proven to be very desirable to occupiers. All land is likely to be developed and occupied within the plan period.	Excellent	Yes	Yes	Excellent	Retain
MU4	Land at Frognal Lane, Teynham	Middling - the site is on the A2, but the employment element is proposed for the rear of the site.	There are no large employment areas in Teynham, and the adjacent uses are residential. However, the western parcel is close to the Fowler Welch Cool Chain warehouse facility and the small number of businesses on the northern side of London Road opposite Cool Chain.	There are shops and amenities on the A2 in Teynham, and Sittingbourne is 5kms.	Reasonable	None	Good	M2 J5 is 11 kms (via A2 & A249).	Reasonable	Good access arrangements on the A2, but to access M2 requires either passing through Sittingbourne or around Faversham.	Reasonable	No	9	Reasonable	Site currently has an undetermined planning application for employment uses	The site is in a reasonable location with immediate access onto the A2 but the local market is unproven for B class development. But there is limited precedence of recent B class development in this location. But agents report that as long as there is reasonable connectivity development out with the main urban areas would be desirable to occupiers.	Reasonable	Yes	Yes	Reasonable - but competition from better located sites.	Retain
MU6	Land at Lady Dane Farm, east of Love Lane	Low - Love Lane is a minor route.	Middling - opposite a cemetery and some residential., and backing onto open countryside.	Limited provision on Selling Road. Town centre 1.8kms.	Reasonable	None, site is flat and of regular shape.	Excellent	Site equidistance from M2 Js6 &7. J6 M2 2.6kms, & J7 2.2kms.	Excellent	The route to the M2 J6 (Love Lane, Canterbury Rd and A251) is generally good, but Love Lane is narrow in places, and is not suited to large vehicles, and would need widening to accommodate development.	Reasonable	No	6	Reasonable	Evidence of both developer and occupier interest.	Reasonable location and connectivity. But there is limited competition as there are few better sites in Faversham, which is a well sought after location.	Good	Yes	Yes	Middling for office, as there is limited demand in Faversham High for industrial as there is a lot of demand	Retain
MU7	Perry Court Farm, Faversham	High - on the M2 and adjacent to link road, albeit visibility will need to be minimal due to AONB to south of M2.	Backing on to small number of residential, and otherwise open farmland and road infrastructure.	None immediate, but local centre proposed as part of the wider site. Faversham town centre 1.7kms.	Good	None	Excellent	Immediate access to J6 M2.	Excellent	New junction on to the A251 will be needed.	Excellent	No	0	Very poor	Known developer interest	Good location and connectivity, and there is limited competition as there are few better sites in Faversham, which is a well sought after location. This site is likely be built out and occupied within the plan period.	Good	Yes	Yes	High	Retain

1 BASIC INFORMATION	2	3	4	5	6	7	8	9	10	11	12	13	14 CONSTRAINTS	15	16	17 ATTRACTIVENESS TO OCCUPIERS *External environment*	18	19	20
Area ID.	Area name	Location map	Market Area	Area description	Current use	Is the area previously developed land?	Area (ha)	Sequential location	Proposed principle use	Principle land use (office/indl)	Any planning designations	Planning History	Detail any constraint(s) to delivery of whole or part of area? (inc. physical and policy)	Overall constraints?	Is this area available?	Prominence of area	Compatibility of surrounding uses	Access to amenities	Score
Area of Search 1	East of Cowstead Corner		Sheerness	This farmland rises up quite considerably from the A249 and Queenborough to the west.	Agricultural	No	24.5	Adjacent to the built up area	B class uses	Industrial	The area sits within an 'important local countryside gap', and outside the built-up area boundary. The Local Plan (pol ST3) considers such areas to be located in open countryside, where the primary objective is protection from isolated and/or large scales of development.	None	The development of this area could lead to the coalescence of Halfway and Queenborough/ Rushenden. Especially because of the rising ground issue that could make industrial activity very prominent in the landscape.	Major	Not known	High - at the junction of the A249/250, and exposed location with rising ground.	Industrial uses existing and planned to the south and west, but residential to the north and open countryside to the east and south.	Immediate access to Morrisons superstore and leisure activity, and Queenborough 1kms.	Good
Area of Search 2	Land South of Jct6 (M2)		Faversham	Countryside location, immediately south of J6 M2.	Some residential , but mostly agricultural	No	53.6	Outside the built up area	B class uses	Industrial	With the exception of the land at J6, the whole area is within the 'Area of high landscape value' (Kent Level) local designation. The Local Plan (pol ST3) considers such areas to be located in open countryside, where the primary objective is protection from isolated and/or large scales of development. Salters Lane is locally designated as a 'rural lane'.	Small plot within the search area to the north west has planning permission for change of use from B8 to B1, no loss nor gain in floorspace.	Development here would undermine the AHLV, but if carefully designed/ contained to particular areas may not impact on the AONB a little further south. Copton Manor, off Salters Lane includes Grade 1 & 2 listed buildings and there are veteran trees in the south of the site that are subject to TPOs and will need to be protected.	Major	Not known	Potential for high prominence from the M2.	Motorway to the north, but open agricultural countryside on other sides.	No provision nearby, Faversham 3kms.	Reasonable
Area of Search 3	Brenley Corner		Faversham	Area in open countryside and remote from Faversham, but the western most half is very close to the mixed use allocation on the eastern limits of Faversham, Lady Dane Farm. Excellent strategic location for employment uses immediately south of the M2/A2 J7.	Agriculture - mix of hop and cereal growing.	No	66.6	Outside the built up area	B class uses	Industrial	This area is beyond Faversham's built-up area boundary, and the Local Plan (pol ST3) considers such areas to be located in open countryside, where the primary objective is protection from isolated and/or large scales of development. The area itself is not included in any Plan designations. However, to the south west, beyond the M2 is the Kent Downs AONB.	No extant planning permissions	The potential impact on the AONB, located just a short distance to the south-west is the key constraint limiting the potential scope and scale of development in this location. There are also known capacity limitation concerns at J7 M2 in respect of additional traffic generation that may either limit the scope for development or require significant infrastructure investment to deliver additional capacity.	Major	Not known	A highly prominent area that would interest employers.	The main neighbouring uses are agriculture and road infrastructure.	Faversham (4kms)	Reasonable
Area of Search 4	Nash Court		Faversham	Area in open countryside and remote from Faversham, and on eastern side of A299 (M2). Excellent strategic location for employment uses immediately north of the M2/A2 J7.	agriculture	No	20.1	Outside the built up area	B class uses	Industrial	This area is beyond Faversham's built-up area boundary, and the Local Plan (pol ST3) considers such areas to be located in open countryside, where the primary objective is protection from isolated and/or large scales of development. The area and its immediate surroundings are not included in any Plan designations.	No extant planning permissions	The area is open countryside and presently Local Plan ST3 would apply. To the south-east are the collection of Grade 2* listed buildings at Nash Court that any development in the area would need to consider and respect the setting of. There are also known capacity limitation concerns at J7 M2 in respect of additional traffic generation that may either limit the scope for development or require significant infrastructure investment to deliver additional capacity.	Major	Not known	A highly prominent area that would interest employers.	The main neighbouring uses are agriculture and road infrastructure.	Faversham (4kms)	Reasonable
Area of Search 5 (north)	Waterham		Rural	Farmland wrapping around Hern hill Nursery and adjacent to the A299 services. The area only partly in Swale, and is mostly in Canterbury district.	Agriculture	No	32.1	Outside the built up area	B class uses	Industrial	The part of the area that is within SBC is not within a built-up area boundary, and therefore is considered to be located in open countryside (Local Plan pol ST3), where the primary objective is protection from isolated and/or large scales of development. There are no Plan designations that apply to the area.	An EIA screening opinion has been submitted for demolition of buildings and construction of water tanks.	Whilst the area's location is in open countryside, there are some industrial units, roadside services and large scale agricultural uses adjoining the area. No known on-site physical constraints. The site is being promoted through the SHLAA for housing-led development with some commercial uses.	Minor	Available in the plan period	The area is partly shielded from view from the A299 by the roadside services. However, that part within the CDC area would have high prominence, albeit on the A299, which is the coastal road, a less attractive location for industrial and office occupiers/developers than M2/A2 locations. The local topography means the site is visible from the recently planted Victory Wood just to the south of High Street.	Reasonable - there are some neighbouring large glasshouse buildings & roadside services, but the prevailing use is agricultural.	Limited provision in Highstreet. Nearest centre Whitstable 5.5 kms.	Poor
Area of Search 5 (south)	Waterham		Rural	Collection of local industrial servicing activities at Lamberhurst Farm (existing area R15) with land to improve access to strategic road network.	Light industrial /agriculture	Yes	17.0	Outside the built up area	B class uses	Industrial	The area is not within a built-up area boundary, and is therefore considered to be located in open countryside (Local Plan pol ST3), where the primary objective is protection from isolated and/or large scales of development. The southern edge of the area is within or adjacent to the 'Area of high landscape value' (Swale Level).	Planning application for 25sqm of B1a, 175sqm of B1c and 175sqm of B8 is currently undetermined.	Whilst the area's location is in open countryside, and is visible from important leisure locations such as Victory Wood, there are some industrial units, roadside services and large scale agricultural uses adjoining the area. No known on-site physical constraints.	Minor	Not known	Low - in the countryside.	Low - no other employment uses nearby.	Limited provision in Highstreet. Nearest centre Whitstable 6 kms.	Poor

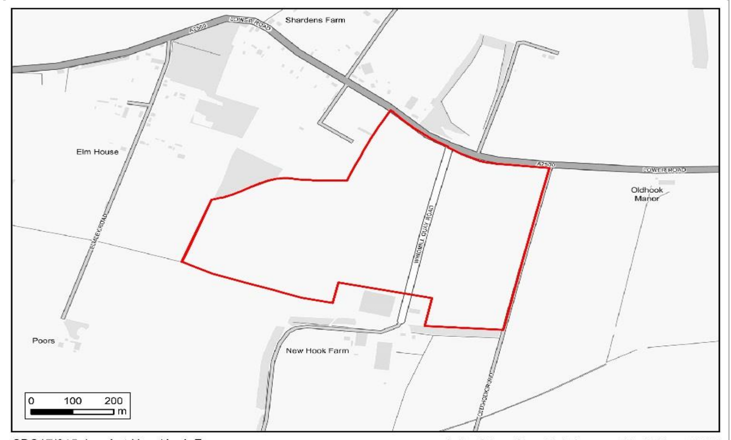
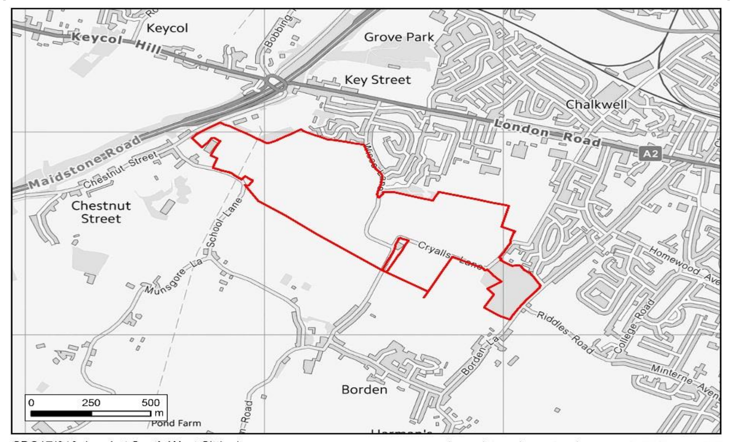
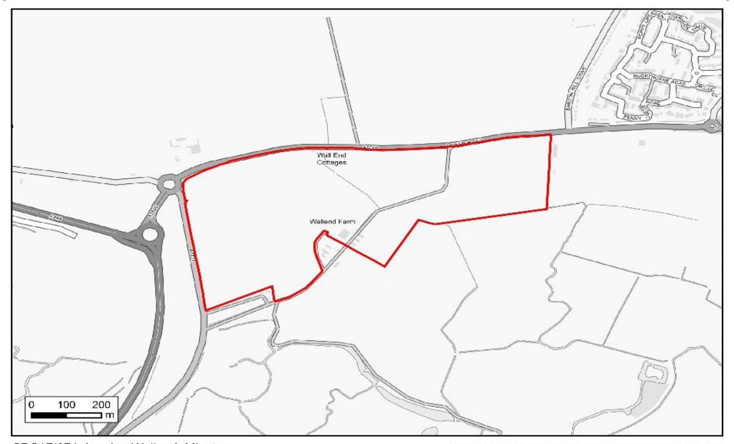
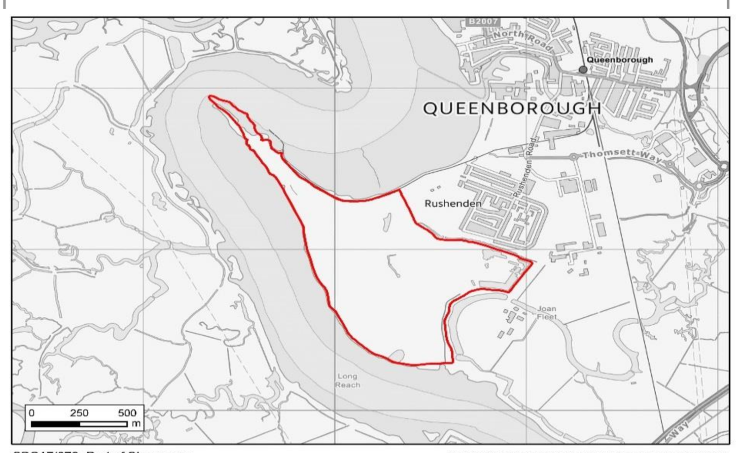
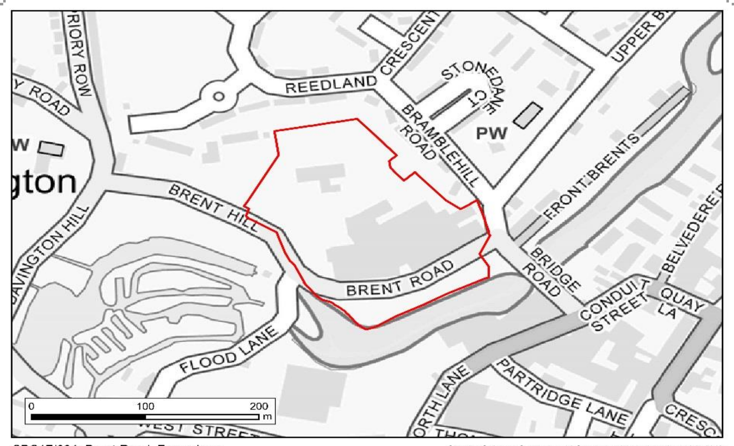
1 BASIC INFORMATION Area ID.	2 Area name	21 *Internal environment* Any problems with shape, gradient, boundary etc.?	22 Score	23 *Strategic accessibility (road)* Proximity to Mway / principal roads [kms]	24 Score	25 *Local access by road* Quality of access to the Mway /principal road network	26 Score	27 *Public transport access* Is the area close to a railway station (within 400m)?	28 Station name & number of bus stops	29 Score	30 *Market Signals* Evidence of developer / occupier interest?	31 Other market intelligence e.g. market history (how long on the mkt), competing supply nearby, occupiers known to be moving in/out.	32 Score	33 Is the area likely to be attractive to employment occupiers?	34 REVIEW / RECOMMENDATION Comments	35 Is there land within the Area of Search that is suitable for employment use?	36 POTENTIAL EMPLOYMENT AREA (Ha)
Area of Search 1	East of Cowstead Corner	Rising ground will be an issue for levels and also more critically from visual impact.	Poor	J5 M2 13kms (via A249).	Good	Excellent - direct access to the A249.	Excellent	No	9	Reasonable	Unknown	Adjacent to the existing Neat's Court allocation. If Neat's Court is developed within the plan period there may be also opportunity for this area.	Reasonable	Yes	The general area has proved to be attractive to larger unit demand in the past, and would be attractive to occupiers as an extension of Neatscourt - with good access and a track record of delivery. But weighing against this is the local strategic gap policy and the topography of the area which limit suitability for industrial activity and in particular for larger units. While local policies can be redrafted subject to competing development pressures, the area would still need to be engineered in such a way to make industrial development of a more modest size and scale acceptable. It is considered that this would be difficult and costly to do.	No	
Area of Search 2	Land South of Jct6 (M2)	No, open rolling arable agricultural land.	Good	Immediate access to J6 M2.	Excellent	New junction on to the A251 will be needed.	Excellent	No	2	Poor	Unknown	Excellent location on junction 6 of the M2. There is currently no employment space here, but motorway junctions are always desirable from B8 occupiers.	Good	Yes	Although Faversham is an untested market for larger unit demand (which fuels the need for additional land) such a highly accessible area is likely to be in demand. The part of the area (closest to the motorway junction) would be particularly attractive to strategic warehouse operators (min area 10 ha), because of the excellent access to the M2. But should areas in the west of the Borough come forward these are likely to be preferable given they are closer to the M25 and benefit from better north / south access (A429).	Yes	10
Area of Search 3	Brenley Corner	The area is effectively two parcels - east and west of the M2. Neither has any obvious physical issues.	Good	Immediate access to J7 M2. However, J7 is known to have capacity issues that may limit the scope for traffic generating development. It is not known whether this capacity issue can be addressed easily and cost effectively.	Excellent	Junction access to the A2 required. This may be more easily managed and controlled from the western parcel, where there may be more scope (compared to land to the east) for a junction on to the A2.	Reasonable	No	9	Reasonable	Unknown	Excellent location on junction 7 of the M2. There is currently no employment space here, but motorway junctions are always desirable from B8 occupiers. Could compete with Nash court if allocated.	Good	Yes	Extending Faversham's development boundary to include this area would be a major expansion beyond the currently built-up area. The western parcel offers better scope for new A2 junction access, compared with land to east of the M2. Possible opportunity area for future rounds of plan review. Comments re Area of Search 2 also apply here.	Yes	20
Area of Search 4	Nash Court	None	Excellent	Immediate access to J7 M2. However, J7 is known to have capacity issues that may limit the scope for traffic generating development. It is not known whether this capacity issue can be addressed easily and cost effectively.	Excellent	Junction access to the A299 required via Staple Street.	Reasonable	No	7	Reasonable	Unknown	Excellent location on junction 7 of the M2. There is currently no employment space here, but motorway junctions are always desirable from B8 occupiers. Could compete with Brenley Corner if allocated.	Good	Yes	Whilst immediate proximity to J7 M2 is a positive factor, and access to the A299 should be possible via Staple St, this location's relative remoteness is a major disadvantage and constraint on any development prospects. Future consideration of where to extend built-up boundaries to include future development areas are unlikely to favour this area because it is more remote than others, and is on the wrong side of a defining and defendable boundary (A299/M2). Comments relating to Area of Search 2 apply here.	Yes	10
Area of Search 5 (north)	Waterham	None. The area appears flat, and free of impediments.	Good	Immediate access to the A299 (that becomes M2 to the west at J7).	Excellent	Access via Highstreet and Plumpudding Lane. Suitable for small-medium vehicles, but possibly unsuitable for large vehicles.	Reasonable	No	3	Poor	Reported developer interest, but very likely to be for local and small scale activity.	The A299 is the coastal road, and is not a route attractive for logistics and distribution (which is the main growth sector) because the main routes for this activity are the M20 and M2 that link much more directly to the ports of Folkestone and Dover. Whilst there may be some interest in small scale local industrial on the A299, there is no interest from sub-regional occupiers because the route does not connect ports and distribution areas or centres of population. The Mways provide much more direct routes and offer land for distribution facilities at their junctions. Unlike the western part of the Borough, this locality is too far east to serve the London distribution market.	Poor	Yes	Occupier / developer interest in this area is unlikely to be for more than of small scale local provision as the A299 coastal road is not attractive to larger scale industrial or warehousing activity serving the wider market, as evidenced by the poor take up at Altira Park development at Herne Bay just 13 kms to the east.	Yes	32.1
Area of Search 5 (south)	Waterham	Poor - unplanned former agricultural buildings without clear parking and servicing areas and no internal landscaping.	Poor	A299 (becomes the M2) 0.8kms.	Excellent	Access would be to via Plumpudding Lane, an improvement on current arrangements.	Reasonable	No	3	Poor	Landowner interest in a mixed use development - residential plus business campus of small B1 units.	The A299 is the coastal road, and is not a route attractive for logistics and distribution (which is the main growth sector) because the main routes for this activity are the M20 and M2 that link much more directly to the ports of Folkestone and Dover. Whilst there may be some interest in small scale local industrial on the A299, there is no interest from sub-regional occupiers because the route does not connect ports and distribution areas or centres of population. The Mways provide much more direct routes and offer land for distribution facilities at their junctions. Unlike the western part of the Borough, this locality is too far east to serve the London distribution market.	Poor	Yes	Occupier / developer interest in this area is unlikely to be for more than of small scale local provision as the A299 coastal road is not attractive to larger scale industrial or warehousing activity serving the wider market, as evidenced by the poor take up at Altira Park development at Herne Bay just 13 kms to the east.	Yes	17.0

1 BASIC INFORMATION Area ID.	2 Area name	3 Location map	4 Market Area	5 Area description	6 Current use	7 Is the area previously developed land?	8 Area (ha)	9 Sequential location	10 Proposed principle use	11 Principle land use (office/indl)	12 Any planning designations	13 Planning History	14 CONSTRAINTS Detail any constraint(s) to delivery of whole or part of area? (inc. physical and policy)	15 Overall constraints?	16 Is this area available?	17 ATTRACTIVENESS TO OCCUPIERS *External environment* Prominence of area	18 Compatibility of surrounding uses	19 Access to amenities	20 Score
Area of Search 6	West Teynham		Rural	Open farmland either side of the A2, to the west of Teynham.	Agriculture with the Coolchain distribution unit and some light industrial units centred on the A2.	No	81.9	Outside the built up area	B class uses	Industrial	Part of the western half of the area (north of the A2) is within the 'safeguarded area of search for Sittingbourne Northern Relief Road'. Otherwise no landscape or other designations.	Immediately to the south-west is the 585 ha area that was recently subject to an EIA opinion for a mixed use development including 120,000 sq m of commercial space.	Air quality issues linked to the A2 are the critical constraint for this site.	Major	Not known	Reasonable - on the busy A2, but not on or close to the strategic network.	Reasonable - there is a small core of existing industrial and commercial activity, and relatively few dwellings, with agriculture the predominant surrounding use. The realisation of MU3 that will deliver a substantial expansion to Teynham will reduce the remoteness of this area.	Teynham 1kms, Sittingbourne 3.5kms.	Reasonable
Area of Search 7	Tonge		Rural	Open farmland bordered to the south by Lomas Road and the railway line and to the east by new residential and Phase V of Eurolink.	Agriculture	No	14.4	Adjacent to the built up area	B class uses	Industrial	The area is allocated mostly for housing as part of the 'proposed mixed use allocation' MU2. The 'safeguarded area of search for Sittingbourne Northern Relief Road' straddles the southern half of the area. The Kent Level Area of High Landscape Value is immediately to the east.	No extant planning permissions. Immediately to the west is the Phase V Eurolink area that is currently under construction to provide the permitted 46,600 sq m mixed B uses.	Adjacent to the SSSI and SPA, the AHLV and listed Church and Golf Club buildings.	Major	Not known	Currently low, but potentially high due to the immediacy of the proposed route of the Northern Relief Road.	There would be a need for substantial landscape buffering to avoid harm to the main constraints, but the area would be a logical extension to neighbouring Eurolink.	Poor. Muston 1.6 kms and the town centre 2.5 kms via Lomas Road.	Poor
Area of Search 8	Bobbing		Sittingbourne	A large linear area on the western side of the A249 that takes in the village of Bobbing and some other hamlets, but is largely farmland.	Mostly agriculture, but some light industrial uses including Grove Dairy Farm Business Centre, Stickfast Farm and FloPlast's office.	No	172.3	Outside the built up area	B class uses	Industrial	The area between the A249 and Sheppey Road forms part of the 'Important local countryside gap' buffer, and runs down the entire length of the whole area. To the north it is obvious that the gap serves to stop coalescence of Iwade with Sittingbourne, but the rationale for the boundary is more questionable in the area of search, as there is no settlement of any scale for Sittingbourne to coalesce with. The Local Plan (pol ST3) considers such areas to be located in open countryside, where the primary objective is protection from isolated and/or large scales of development.	No employment related history.	The area's location in open countryside is a major constraint. No known physical constraints.	Major	Not known	Development at or close to the three junctions in the locale of the Area of Search would have good prominence.	There are some local business uses, which will aid compatibility, but the settlements are mostly residential in nature and the surroundings farmland.	Some limited provision in Bobbing, including the roadside services at the Sheppey Way/A249 junction, and the town centre is 4 kms.	Reasonable

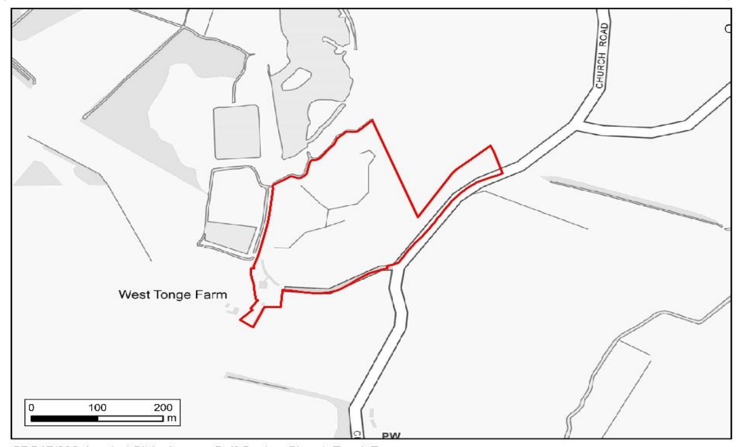
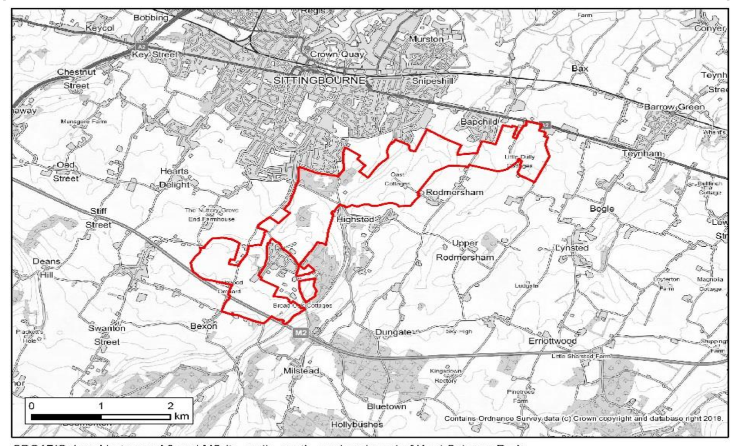
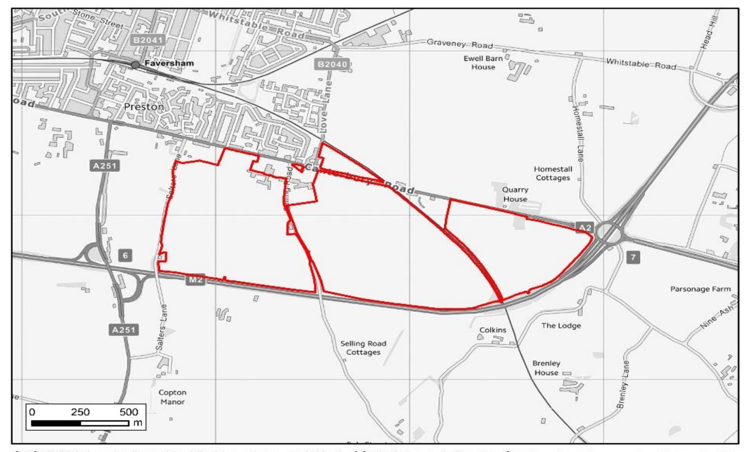
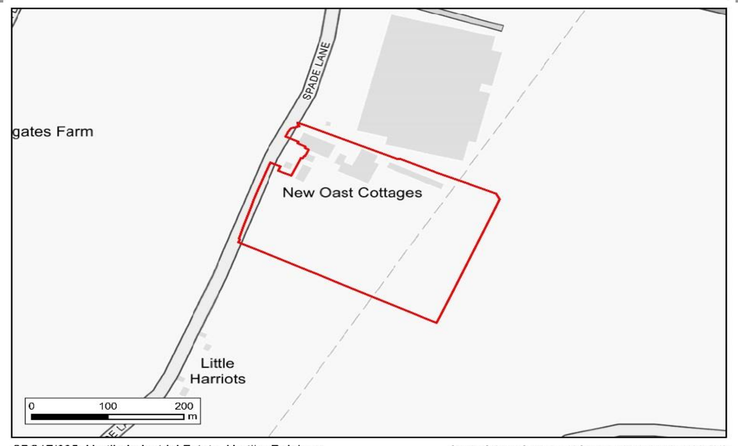
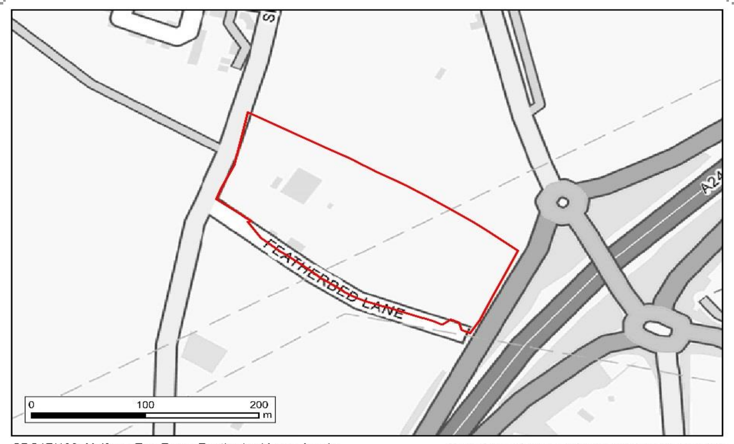
1 BASIC INFORMATION Area ID.	2 Area name	21 *Internal environment* Any problems with shape, gradient, boundary etc.?	22 Score	23 *Strategic accessibility (road)* Proximity to Mway / principal roads [kms]	24 Score	25 *Local access by road* Quality of access to the Mway /principal road network	26 Score	27 *Public transport access* Is the area close to a railway station (within 400m)?	28 Station name & number of bus stops	29 Score	30 *Market Signals* Evidence of developer / occupier interest?	31 Other market intelligence e.g. market history (how long on the mkt), competing supply nearby, occupiers known to be moving in/out.	32 Score	33 Is the area likely to be attractive to employment occupiers?	34 REVIEW / RECOMMENDATION Comments	35 Is there land within the Area of Search that is suitable for employment use?	36 POTENTIAL EMPLOYMENT AREA (Ha)
Area of Search 6	West Teynham	None. The area appears flat, and free of impediments.	Good	M2 J5 in 10 kms (via A2 & A249).	Reasonable	Good potential access on to the A2, but to access M2 requires either passing through Sittingbourne (to join the A249) or around Faversham.	Reasonable	No	6	Reasonable	Unknown	There are some small scale employment uses locally, but they generally occupy buildings converted from other uses, and are in small clusters at best. The area cannot be considered an established employment area that would be attractive to sub-regional, distribution activity or other larger scale forms of employment use. Additionally access links to the Mway require vehicles to pass through various settlements on route.	Poor	No	For more standard industrial and warehouse demand, which are the activites that are driving the areas of search, the location is far from ideal given the air quality issues on the A2, which would only be made more acute through adding more large vehicles to the road network in this location. This location also lacks all the usual industrial infrastructure that can be found when activities cluster. Until the road infrastructure is improved in the wider area, the this area is unsuitable for employment use.	No	
Area of Search 7	Tonge	None	Excellent	J on A249 (via Swale Way) 4.5km & J5 M2 11.5km. A longer distance than via the A2, but a better quality / appropriate route.	Good	Swale Way is a purpose built route suitable for heavy goods vehicles.	Good	No	0	Very poor	Unknown	There are already pre-lets in place for the neighbouring Eurolink Phase V. This natural extension would also prove popular with occupiers.	Excellent	Yes	This area would make a logical extension to the Borough's principle employment area - for industrial / warehousing but also potentially the flexible office/light industrial units that are in demand in the area. Employment use in this location would achieve co-locational benefits from proximity to all the other industrial businesses at Eurolink, and sharing the available infrastructure. However, the road infrastructure is the major constraint, and the suitability of the area is contingent on completion of the new link road, and most probably a new access road south of the town (to the M2). We understand there are already congestion issues at Eurolink, and further expansion without solving the access constraint could hinder the efficient operation of the whole Eurolink area. For this area to be taken further the local access (northern relief road) would need to be committed (with other associated upgrades to the local network) and delivered alongside the new employment.	Yes	14.4
Area of Search 8	Bobbing	None	Good	J5 M2 6.2km. J on A249 1.7km (taking the midpoint to be the J with A2006).	Good	Should access be possible directly on to the A249 this would score excellent, however if direct access onto A249 is not possible (and we have been advised this is more likely) the score would be lower.	Reasonable	No	4	Poor	Unknown	There are some existing industrial uses, but no clusters. The area could be attractive to occupiers if direct access on A249 was secured.	Reasonable	Yes	Land closest to the A249 junctions would be most sought after. The A249 junction with the A2 has little scope because it is largely residential in this area and the B2005 would be more challenging because of the need to maintain the strategic gap with Iwade. However, there appears to be land that could be utilised for employment at the Bobbing junction (with the B2006) should the strategic gap be reviewed in this area.	Yes	10

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20
BASIC INFORMATION													CONSTRAINTS			ATTRACTIVENESS TO OCCUPIERS *External environment*			
CfS ID.	Name	Location map	Market Area	Site description	Current use	Is the site previously developed land?	Area (ha)	Sequential location	Proposed principle use	Principle land use (office/indl)	Any planning designations	Planning History	Detail any constraint(s) to delivery of whole or part of site? (inc. physical and policy)	Overall constraints?	Is this site available?	Prominence of site	Compatibility of surrounding uses	Access to amenities	Score
SBC17/005	Land at Pheasant Farm (west), Howt Green, Sittingbourne	 SBC17/005: Land at Pheasant Farm (West), Howt Green, Sittingbourne	Sittingbourne	Relatively small parcel of white land next to the Floplast head office (to the south), within the Important Local Countryside Gap area to the west of Sittingbourne and the A249. Access on to the A249 is poor requiring either a loop through Iwade or through Bobbing village.	vacant open land	No	1.6	Outside the built up area	Light Industrial (B1c)	Industrial	Important Local Countryside Gaps (DM25), beyond the built-up area boundary, and the Local Plan (pol ST3) applies, where the primary objective is protection from isolated and/or large scales of development. Kent Minerals safeguarded areas (Brickearth).	No recent planning history (5 years)	The principle constraint is the poor access on to the SRN (A249) that would require vehicles to pass through neighbouring villages.	Major	Immediately available	Poor, screened from the adjacent A249, and only visible from access road (Sheppey Way).	Office and open storage to the south, agriculture to the north, the A249 to the east and car breakers yard to the west.	Nothing in immediate vicinity	Poor
SBC17/006	Land rear of The Street & Hempstead Lane, Bapchild	 SBC17/006: Land to the rear of The Street and Hempstead Lane, Bapchild	Rural	Land immediately abutting the built-up area boundary. White land, but within the area of search for the Northern Relief Road (but very unlikely to be incorporated in route), and adjacent to an AHLV.	agricultural	No	3.8	Adjacent to the built up area	Light Industrial (B1c)	Industrial	The site is within a designated Important Local Countryside Gaps (DM25). This area is beyond the Bapchild built-up area boundary, and the Local Plan (pol ST3) considers such areas to be located in open countryside, where the primary objective is protection from isolated and/or large scales of development. The site also includes Kent Minerals safeguarded areas (Brickearth); Local Green Space (DM18); and the Safeguarded Area of Search for Sittingbourne Northern Relief Road (AS1).	No recent planning history (5 years)	The gap policy and the Local Green Space policies are the key local policy constraints on development.	Minor	Immediately available	Screened by housing from both the A2 and Hempsted Lane.	Neighbouring residential and agricultural uses. The former would limit development opportunities.	Limited provision in Bapchild, with Sittingbourne town centre 2 kms.	Reasonable
SBC17/008	Land fronting east side Bobbing Hill, Sittingbourne	 SBC17/008: Land Fronting east side, Bobbing Hill, Sheppey Way, Bobbing	Sittingbourne	Small narrow site with long road frontage on Sheppey Way, within the Bobbing Important Local Countryside Gaps policy.	agricultural	No	1.0	Adjacent to the built up area	Light Industrial (B1c)	Industrial	The site is within a designated Important Local Countryside Gaps (DM25). This area is beyond any built-up area boundary, and the Local Plan (pol ST3) considers such areas to be located in open countryside, where the primary objective is protection from isolated and/or large scales of development. Also within a Kent Minerals safeguarded area (Brickearth).	No recent planning history (5 years)	Within the Important Local Countryside Gaps area.	Minor	Immediately available	Landscape screened from the A249, but with good road frontage on Sheppey Way, now a minor road.	the site is surrounded by transport infrastructure, so no compatibility issues.	Foodstore and other limited provision in Bobbing. Sittingbourne town centre 2.6 kms.	Good
SBC17/025	Land at Radfield Farm, London Road, Bapchild	 SBC17/025: Land at Radfield Farm, London Road, Bapchild	Rural	White land with immediate access to the A2, close to the Fowler Welch warehouse and a small number of businesses on the opposite site of the A2. Redundant farm buildings on approximately half the site.	agricultural (with half the site occupied by redundant farm buildings)	Yes	3.0	Outside the built up area	B1	Industrial	This area is beyond Teynham's built-up area boundary, and the Local Plan (pol ST3) considers such areas to be located in open countryside, where the primary objective is protection from isolated and/or large scales of development. The site is partially within the Kent Minerals safeguarded area (Brickearth)	Site is at the very northern end for 17/506492/ENVSCR - EIA Screening Opinion for 11,250 dwellings and 120,000 sq m commercial space. Opinion awaited.	For areas such as this, located in open countryside, the Local Plan (pol ST3) considers the primary objective to be protection from isolated and/or large scales of development.	Minor	Immediately available	Highly prominent from A2.	Although there are some small businesses operating on the opposite site of the A2 and Fowler Welch close by, the immediate neighbouring uses are residential including listed oast houses, where there will be compatibility issues.	Limited local provision, Teynham 1.1 km and Sittingbourne 3 kms.	Reasonable
SBC17/032	Monkshill Farm, Monkshill Road, Faversham	 SBC17/032: Monkshill Farm, Monkshill Road	Faversham	Farmland in very rural location, isolated, poor road access, but close to Waterham Business Park.The farm is currently occupied by a co-working business, FarmWorkPlay.	agricultural	No	26.7	Outside the built up area	B class uses	Industrial	Northern half of the site is within Local Designated Site of Biodiversity (DM28). This area is beyond any built-up area boundary, and the Local Plan (pol ST3) considers such areas to be located in open countryside, where the primary objective is protection from isolated and/or large scales of development. Although outside of the site, directly to the north is 'International and national designated site of biodiversity or geological value (DM28)' and 'Areas of High Landscape Value' and Kent Minerals River Terrace'.	Prior notifications submitted for change of use to nursery. Granted. Monkshill Farm 16/507694/PNT	Landscape designations on and immediately off site. The rural isolation and poor access arrangements are major constraints.	Major	Immediately available	Very low, due to rural location and poor access.	Surrounded by farmland used for various forms of agricultural husbandry notably large scale glass houses.	Limited provision on A299 services. Faversham 10 kms.	Poor
SBC17/033	Syndale Park, London Road, Faversham	 SBC17/033: Syndale Park, London Road, Faversham, Kent	Faversham	Isolated hotel complex (in operation) in designated Area of High Landscape Value.	Hotel/ leisure. Most of the site is open parkland.	No	3.5	Outside the built up area	B1	Office	Site is within the Syndale Conservation Area and an 'Area of High Landscape Value', and is considered likely to contain heritage assets connected to a Roman Fort and the Roman Watling Street. It lies beyond Faversham's built-up area boundary, and the Local Plan (pol ST3) considers such areas to be located in open countryside, where the primary objective is protection from isolated and/or large scales of development.	No relevant planning applications	The Consrvation Area and AHLV designation are major constraints on intensification of use.	Major	Not known	Site is on the A2, so has prominence, but the buildings are towards the rear of the site and have no visual prominence.	Surrounded by parkland / pastures.	Faversham town centre 2.2 kms.	Reasonable

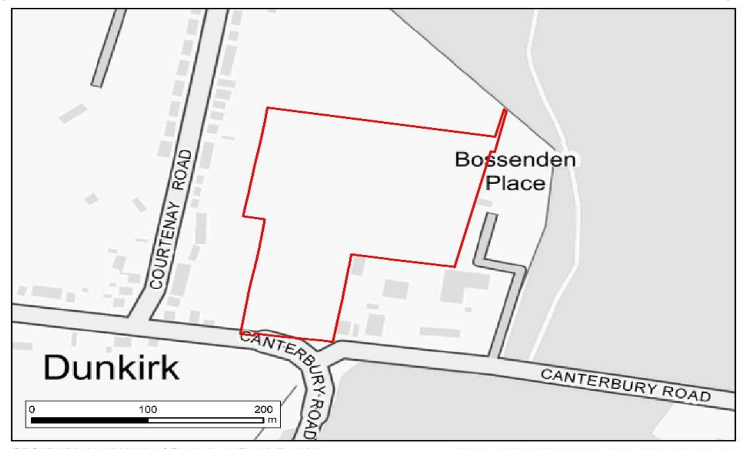
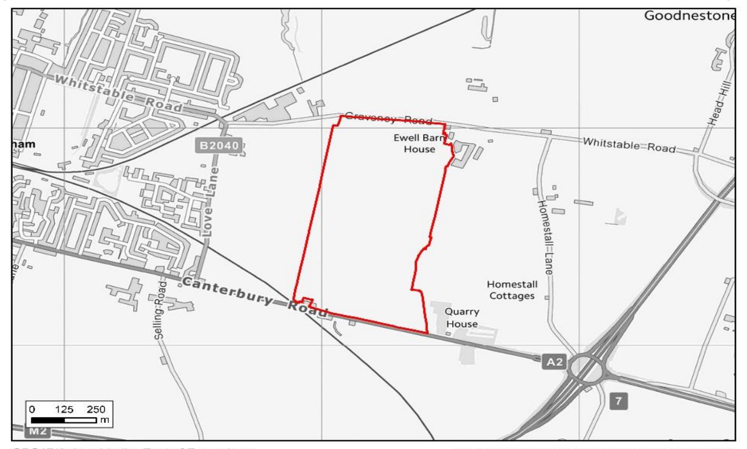
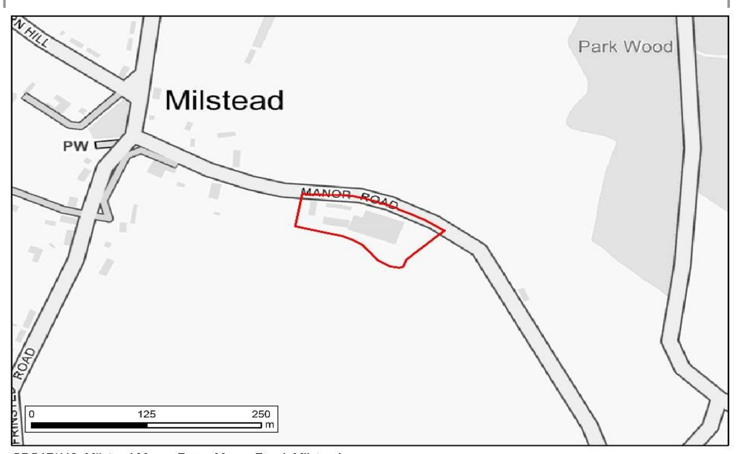
1 BASIC INFORMATION CfS ID.	2 Name	21 *Internal environment* Any problems with shape, gradient, boundary etc.?	22 Score	23 *Strategic accessibility (road)* Proximity to Mway / principal roads [kms]	24 Score	25 *Local access by road* Quality of access to the principal road network	26 Score	27 *Public transport access* Is the site close to a railway station (within 400m)?	28 Station name & number of bus stops	29 Score	30 *Market Signals* Evidence of developer / occupier interest?	31 Other market intelligence e.g. market history (how long on the mkt), competing supply nearby, occupiers known to be moving in/out.	32 Score	33 Is the site likely to be attractive to employment occupiers?	34 REVIEW / RECOMMENDATION Comments	35 Is the site suitable for employment use?	36 POTENTIAL EMPLOYMENT AREA (Ha)
SBC17/005	Land at Pheasant Farm (west), Howt Green, Sittingbourne	No	Excellent	M2 J5 6.5kms. A249 J 2kms via Sheppey Way and Iwade or Bobbing.	Good	Sheppey Way - need to pass through villages to link with the A249.	Poor	No	1	Poor	Not for employment uses.	Located in an existing employment area which would be attractive to occupiers, but not as established as other employment areas. The site's access is poor as it passes through a residential area.	Poor	Yes	Should new development be promoted west of the A249 in the new plan this relatively small site, along with other land in the general area, could be suitable for new employment use, subject to a favourable review of the policy context.	Yes	1.6
SBC17/006	Land rear of The Street & Hempstead Lane, Bapchild	Site backs on to residential gardens on two sides. Achieving access onto the A2 adjacent to the residential will be a challenge.	Reasonable	J5 M2 9 kms	Reasonable	Access on the A2 passes through Bapchild village and Sittingbourne to access the Mway.	Poor	No	4	Poor	Not for employment	The site is in close proximity to residential, which may be off putting to some occupiers. Access is tight but would likely not be an obstacle for some occupiers.	Reasonable	Yes	A reasonable prospect for small scale local light industrial. The critical issue here is the potential for the larger site to the South (17/093) to come forward as a new strategic allocation (with a new business park centred on KSP) and the completion of the Northern link road. Should this come to fruition then this whole side of Sittingbourne becomes more attractive for both housing and employment. In this eventuality this site needs to be considered as an extension to site 93. Without a new link road and ideally new access to the Motorway this (greenfield) site should not be taken forward. A reasonable prospect for small scale local light industrial in the longer term.	No	
SBC17/008	Land fronting east side Bobbing Hill, Sittingbourne	No, other than relatively narrow and small.	Good	J5 M2 4.5 km, via Sheppey Way and A249.	Good	Good, via Sheppey Way and A249.	Good	No	1	Poor	Being actively promoted.	The site is small and is not a uniform size which reduces its attraction to developers. More importantly there is no existing access point to the site. But a developer is actively promoting the site, which would indicate that they see this can be achieved.	Reasonable	Yes	Should new development be promoted East of the A249 in the new plan this site, along with other land in the general area could be suitable for new for small scale consumer service orientated employment. But not as a small stand alone new allocation.	No	
SBC17/025	Land at Radfield Farm, London Road, Bapchild	No	Good	J5 M2 10 kms	Reasonable	Access on the A2 passes through Bapchild village and Sittingbourne to access the Mway.	Poor	No	2	Poor	Being actively promoted.	Not an established employment location, but would be attractive to occupiers if it were redeveloped as part of the SBC/17/006 promoted site.	Reasonable	Yes	Comments made relating to SBC/17/006 are relevant here. Even through the site is not ideally located for new employment uses redevelopment for low density employment could bring the (PDL) site back into use. This weighs in favour of allocation.	Yes	3.0
SBC17/032	Monkshill Farm, Monkshill Road, Faversham	No	Good	M2 J7 6.5kms viaA299.	Good	A299 is excellent, but Monkshill Road and HighStreet Rd are rural lanes.	Poor	No	0	Very poor	Unknown	Not an established employment location. It has neither good access nor is it located close to amenities. This would not be attractive to occupiers or developers.	Poor	No	Too remote	No	
SBC17/033	Syndale Park, London Road, Faversham	No	Good	J6 M2 3 kms via A2/A251	Good	A2/A251 provide good access.	Good	No	0	Very poor	Not for employment, but has been submitted for SHLAA consideration as a Mixed Use area.	Outside town boundary of Faversham. Not in close proximity to amenities. Unlikely to be attractive to occupiers or developers.	Poor	No	Too remote	No	

1 BASIC INFORMATION	2	3	4	5	6	7	8	9	10	11	12	13	14 CONSTRAINTS	15	16	17 ATTRACTIVENESS TO OCCUPIERS *External environment*	18	19	20
CfS ID.	**Name**	**Location map**	**Market Area**	**Site description**	**Current use**	**Is the site previously developed land?**	**Area (ha)**	**Sequential location**	**Proposed principle use**	**Principle land use (office/indl)**	**Any planning designations**	**Planning History**	**Detail any constraint(s) to delivery of whole or part of site? (inc. physical and policy)**	**Overall constraints?**	**Is this site available?**	**Prominence of site**	**Compatibility of surrounding uses**	**Access to amenities**	**Score**
SBC17/036	Land at Lower Road, Minster	 SBC17/036: Land off Lower Road, Minster on Sea, Sheerness, ME12 3RT Contains Ordnance Survey data (c) Crown copyright and database right 2018.	Sheerness	White Land with local consumer related industrial employment on adjacent site to the east and football club to the west.	agricultural	No	5.2	Outside the built up area	B class uses	Industrial	This area is beyond Minster's built-up area boundary, and the Local Plan (pol ST3) considers such areas to be located in open countryside, where the primary objective is protection from isolated and/or large scales of development. To the south east, a small part of the site is within an area of Kent Minerals Safeguarded Area (River Terrace). Otherwise, and unusual for the Isle, there is no flood risk, the site is not within areas of landscape value. But land immediately to the south is AHLV and Coastal Change Management and washed over by FZ3.	No recent planning history (5 years)	Site would need a policy change to include it within the settlement boundary, but appears otherwise unconstrained.	Major	Not available in the plan period	Good prominence on an A road junction, albeit a relatively minor A road.	Fairly recent residential on opposite side of A2500 is screened, but planting is currently immature. Immediately neighbouring uses are consumer related industrial employment and football club, that don't present compatibility issues.	Some limited provision in Minster 2.5 kms, Sheerness town centre 6.5 kms.	Reasonable
SBC17/045	Land at New Hook Farm, Minster, Isle of Sheppey	 SBC17/045: Land at New Hook Farm Contains Ordnance Survey data (c) Crown copyright and database right 2018.	Sheerness	White land (farm land) in an isolated rural location, away from areas of employment and with poor road links to strategic network.	agricultural	No	31.2	Outside the built up area	B class uses	Industrial	No designations, but this area is beyond Minster's built-up area boundary, and the Local Plan (pol ST3) considers such areas to be located in open countryside, where the primary objective is protection from isolated and/or large scales of development.	Directly north of New Hook Farm, within the southern section of the site - 16/507943/FULL for the construction of an agricultural anaerobic digestion plant. Granted Feb 2018.	Site would need a policy change to include it within the settlement boundary, and is a relatively remote site.	Major	Not available in the plan period	Low, due to remote location.	Surrounded by agricultural uses, that are compatible with employment uses.	Some limited provision in Minster 4 kms, Sheerness town centre 8 kms.	Poor
SBC17/049	Land at South West Sittingbourne	 SBC17/049: Land at South West Sittingbourne Contains Ordnance Survey data (c) Crown copyright and database right 2018.	Sittingbourne	Agricultural land taking in the MU3 site, but expanded to the west towards the A249. The area to the west may provide opportunity for a road link to the A249.	Agricultural	No	51.4	Adjacent to the built up area	Other	Industrial	Western half of the site is within Important Local Countryside Gaps (DM25) area, and where ST3 will apply. The eastern section within the built up area boundary. The majority of the site is a proposed mixed use allocation (ST4) and Kent Minerals Safeguarded Area (Brickearth).	Entire site. 17/505711/HYBRID - Hybrid application for outline permission 595 dwellings and commercial units and 80 dwellings for full planning permission. No B class uses proposed. Awaiting decision.	Local landscape designations on the western side.	Minor	Not available in the plan period	Prominent location adjacent to a junction on the A249.	the western end is close to an electricity sub-station and bounded by the A249 road infrastructure. No compatibility issues.	Limited provision on London Road 2 kms, Sittingbourne 2.5 kms.	Reasonable
SBC17/071	Land at Wallend, Minster	 SBC17/071: Land at Wallend, Minster Contains Ordnance Survey data (c) Crown copyright and database right 2018.	Sheerness	White Land in agricultural use at the junction of the Sheppey Way (close to the junction with the A249) and A2500, and occupied by Wallend Farm,	agricultural	No	35.7	Outside the built up area	B class uses	Industrial	This area is beyond Minster's built-up area boundary, and the Local Plan (pol ST3) considers such areas to be located in open countryside, where the primary objective is protection from isolated and/or large scales of development. Otherwise there are designations other than the southern edge sits within an 'Areas of High Landscape Value' and ' Coastal Change Management Area' and 'Kent Minerals safeguarded areas (River Terrace).	17/503481/ENVSCR EIA Screening - residential development. On the far eastern side of the site.	Southern edge has landscape and habitat designation. The rest of the site would need a policy change to include it within the settlement boundary. However, otherwise the majority of the site that is not subject of the application for residential has no flood risk and is not within areas of landscape value.	Major	Not available in the plan period	Highly prominent site. Site rises away from the surrounding road network, and although not directly on the A249, it is well connected and highly visible from the A249.	Mostly farmland and transport infrastructure.	Shops and services at Neatscourt 1.6 kms.	Good
SBC17/073	Port of Sheerness, Rushenden Marshes, Rushenden Road	 SBC17/073: Part of Sheerness Contains Ordnance Survey data (c) Crown copyright and database right 2018.	Sheerness	Rushenden Marshes are on the banks of The Swale and within the Kent Level AHLV.	marshland	No	80.3	Outside the built up area	Storage and Distribution (B8)	Industrial	Whole site is designated 'Areas of High Landscape Value (DM24)' and Coastal Change Management Area (DM23). Whole area is within FZ2. SIte is adjacent to Medway Estuary/Marshes SSSI, SPA and RAMSAR area. This area is beyond any built-up area boundary, and the Local Plan (pol ST3) considers such areas to be located in open countryside, where the primary objective is protection from isolated and/or large scales of development. It is within Kent Minerals safeguarded area (River Terrace).	Covers majority of the site. 15/506869/COUNTY - EIA Screening opinion for proposed aggregate recyling facility	The landscape designations restrict the nature of any potential use that might come forward.	Major	Not available in the plan period	Highly prominent from the water and from the A249 because of the flat open terrain.	Mostly marshland, sewage works and Rushenden village to the north.	Superstore and leisure facilities and Queenborough 2 kms.	Reasonable
SBC17/091	BMM Weston, Brent Road, Faversham	 SBC17/091: Brent Road, Faversham Contains Ordnance Survey data (c) Crown copyright and database right 2018.	Faversham	Site is considered under F7/8 (existing sites sheet)															

1 BASIC INFORMATION	2	21	22	23	24	25	26	27	28	29	30	31	32	33	34 REVIEW / RECOMMENDATION	35	36 POTENTIAL EMPLOYMENT AREA
		Internal environment		*Strategic accessibility (road)*		*Local access by road*		*Public transport access*			*Market Signals*						
CfS ID.	Name	Any problems with shape, gradient, boundary etc.?	Score	Proximity to Mway / principal roads [kms]	Score	Quality of access to the principal road network	Score	Is the site close to a railway station (within 400m)?	Station name & number of bus stops	Score	Evidence of developer / occupier interest?	Other market intelligence e.g. market history (how long on the mkt), competing supply nearby, occupiers known to be moving in/out.	Score	Is the site likely to be attractive to employment occupiers?	Comments	Is the site suitable for employment use?	(Ha)
SBC17/036	Land at Lower Road, Minster	No	Good	J5 M2 15 kms via A249	Reasonable	Good via the A2500 first and then A249.	Good	No	6	Reasonable	Being actively promoted.	There is an industrial estate to the east which appears well occupied. Road access is good, and the existing roundabout could be used to access the site. This site would be attractive to developers, assuming that they could make development viable in this location.	Reasonable	Yes	Reasonable site for industrial/warehouse use close to the A249 junction at Neatscourt.	Yes	5.2
SBC17/045	Land at New Hook Farm, Minster, Isle of Sheppey	No	Good	J5 M2 17.5 kms via A249	Reasonable	Good via the A2500 first and then A249.	Good	No	1	Poor	Unknown	The site is remote and not near an established employment location. Access to the site is reasonable, but the location is remote and is unlikely to be attractive to occupiers. Though there is pent up demand in the Borough, occupiers still require locations with amenities and close proximity to the strategic road network.	Poor	No	Too remote to be attractive to industrial occupiers or developers.	No	
SBC17/049	Land at South West Sittingbourne	None	Good	J5 M2 4.4 kms via Chestnut Street and A249.	Good	Chestnut Street is single carriageway and not heavily used. Indeed it is currently used for day time parking. Would need parking restrictions for the site to come forward.	Reasonable	No	0	Very poor	Unknown	Location south of the town at a junction of the A249 would be attractive to occupiers. Would need clear separation from residential as part of the mixed use scheme to avoided negative operational impacts.	Good	Yes	MU3 makes no commitment to deliver traditional employment space here. Only 'commercial space' including a new neighbourhood area. This could be read to mean retail/commercial, and indeed the currently undetermined planning application for the whole site includes retail uses but no B class uses. The western-most parcel of SBC17/049 that is outside the MU3 allocation is circa 10 ha. Given the site's location, with nearby access to the A249, this site could be expanded to meet any additional employment needs, particularly industrial and/or warehousing, but this would be contingent on the access to the A249 being of sufficient quality to support employment related traffic. Without high quality access the commercial attractiveness (and the rationale to consider allocating) of the site for general industrial / warehousing is diminished, but the site could still support the sought after flexible office/light industrial units, especially (as noted in the report) if these were offered freehold.	Yes	10.0
SBC17/071	Land at Wallend, Minster	No, the site rises away from the surrounding land to the south and wet, which makes it highly prominent.	Excellent	J5 M2 13 kms via A249.	Reasonable	Good via the A2500 first and then A249.	Good	No	2	Poor	Unknown	Adjacent to exiting allocations, which are partially developed. The Aldi distribution unit is recently developed, making this an emerging employment location in the Borough. The site would be attractive to occupiers and developers at it can utilise existing road infrastructure and connects quickly to the strategic road network.	Excellent	Yes	An excellent site for industrial/warehouse use on the A249 junction at Neatscourt. A proportion of the site is subject to international landscape designations and a parcel on the eastern end may come forward for residential, which will reduce the overall developable area for employment uses.	Yes	35.7
SBC17/073	Port of Sheerness, Rushenden Marshes, Rushenden Road	Site is marshland.	Poor	J5 M2 15kms (via Thomsett Road and local route through Rushenden).	Reasonable	A new route would be required to avoid Rushenden village. Thomsett Way provides direct access within 2 km to the A249.	Reasonable	No	0	Very poor	Being actively promoted.	One of the options being considered by the port for expansion. The port is at capacity, and the site would be developed and occupied if developed.	Good	Yes	The potential impact of port related activity on this site upon the habitat and ecological importance of the Medway Estuary and the high landscape value of the site needs to be weighed in the sustainable development balance. The options to expand port related activity closer to the docks are extremely limited, and the potential social and economic benefits from expansion of port activity on this site could be considerable.	Yes	Specialist port related land use.
SBC17/091	BMM Weston, Brent Road, Faversham																

1 BASIC INFORMATION CfS ID.	2 Name	3 Location map	4 Market Area	5 Site description	6 Current use	7 Is the site previously developed land?	8 Area (ha)	9 Sequential location	10 Proposed principle use	11 Principle land use (office/indl)	12 Any planning designations	13 Planning History	14 CONSTRAINTS Detail any constraint(s) to delivery of whole or part of site? (inc. physical and policy)	15 Overall constraints?	16 Is this site available?	17 ATTRACTIVENESS TO OCCUPIERS *External environment* Prominence of site	18 Compatibility of surrounding uses	19 Access to amenities	20 Score
SBC17/092	Land at Sittingbourne Golf Centre, Church Road, Tonge	 SBC17/092: Land at Sittingbourne Golf Centre, Church Road, Tonge Contains Ordnance Survey data (c) Crown copyright and database right 2018.	Sittingbourne	White land - currently used as a golf course.	Golf course	No	5.8	Adjacent to the built up area	B2-B8	Industrial	This area is beyond Sittingbourne's built-up area boundary, and the Local Plan (pol ST3) considers such areas to be located in open countryside, where the primary objective is protection from isolated and/or large scales of development. Site is within Kent Minerals Safeguarded Areas (Brickearth and River Terrace). Immediately to the north is SPA and AHLV.	Majority of site. 18/502181/FULL - Refurbishment of driving range and additional facilities. Awaiting decision.	The site does not have a specific landscape designation, but forms part of the buffer between the SPA and AHLV to the north, and development to the south (such areas are protected by ST3), with the northern part of the development area to provide strategic open space to extend the buffer.	Major	Not available in the plan period	The site is not located on part of the SRN, and has low prominence.	Largely open countryside with listed farm buildings immediately to the south.	Generally poor - very limited provision in Murston (2 kms). Sittingbourne town centre 2.7 kms.	Poor
SBC17/093	Land between A2 and M2 (to north, south, east and west of Kent Science Park)	 SBC17/C: Land between A2 and M2 (to north, south, east and west of Kent Science Park	Rural	Huge area encompassing the KSP and abutting SE Sittingbourne.	Agricultural	No	425.5	Outside the built up area	B class uses	Office	Southern half of the site is within Area of High Landscape Value (DM24). The northern half and some of the southern half is within an 'Important Local Countryside Gaps' (DM25) policy area. This area is beyond Sittingbourne's built-up area boundary, and the Local Plan (pol ST3) considers such areas to be located in open countryside, where the primary objective is protection from isolated and/or large scales of development. Some areas within the Kent Minerals Safeguarded Areas (Brickearth).	Entire site. 17/506551/EIASCO and 17/506492/ENVSCR scoping and screening application for 11,250 dwellings and 120,000sqm commercial space. Decision awaited.	Current Plan landscape designations and the need for much improved access arrangements.	Major	Not available in the plan period	This is a very large area of land that extends through open countryside and is only visible from rural lanes, therefor prominence is low.	Some residential areas, but generally agricultural, so few sensitive receptors.	None in vicinity, Sittingbourne town centre 3 km. Development on this scale would need to provide shops and services to serve the new development.	Reasonable
SBC17/094	Land adj to A2 at Love Lane and west of Salter's Lane to Brenley Corner	 SBC17/094: Land adjacent to A2 at Love Lane and West of Salter's Lane to Brenley Corner Contains Ordnance Survey data (c) Crown copyright and database right 2018	Faversham	Land between the A2 and M2, wrapping around the A5 allocation (land at Selling Rd).	agricultural	No	131.0	Adjacent to the built up area	B class uses	Industrial	This area is beyond Faversham's built-up area boundary, and the Local Plan (pol ST3) considers such areas to be located in open countryside, where the primary objective is protection from isolated and/or large scales of development. There are no other landscape designations on the site, other than the Kent Minerals Safeguarded Area (Brickearth), which largely covers the site. Immediately to the south, beyond the M2 is the Kent Downs AONB and AHLV.	No recent planning history (5 years)	Current policy ST3 and the landscape designations to the south. The railway bisects the site.	Major	Not available in the plan period	The site has potentially high prominence set between the M2 and A2.	Site is largely bounded by road infrastructure with residential area on the edge of Faversham to the north.	Faversham town centre 2.7 kms.	Reasonable
SBC17/095	Hartlip Industrial Estate, Hartlip	 SBC17/095: Hartlip Industrial Estate, Hartlip, Rainham Contains Ordnance Survey data (c) Crown copyright and database right 2018.	Rural	White land to the rear of an existing employment site (a large produce storage/distribution depot that appears to link to port activity) on the A2. Remote location away from main industrial areas., with some auto trade and repair businesses in former farm buildings.	agricultural	No	5.9	Outside the built up area	Light Industrial (B1c)	Industrial	This area is beyond Faversham's built-up area boundary, and the Local Plan (pol ST3) considers such areas to be located in open countryside, where the primary objective is protection from isolated and/or large scales of development. Site is mostly covered by Kent Minerals Safeguarded Areas (Brickearth).	No relevant planning applications	The current policy position does not support incursions into the countryside. No physical constraints of note,	Major	Not available in the plan period	Low - to the rear of a large warehouse / coolstores, accessed via a country lane.	Agricultural on most sides, with employment uses immediately to the north.	Limited provision in Rainham 1.5 kms. Nearest major offer Sittingbourne 7.5 kms.	Reasonable
SBC17/097	Bysing Wood Road, Faversham	 SBC17/B: Bysing Wood Road, Faversham Contains Ordnance Survey data (c) Crown copyright and database right 2018.	Faversham	Within an AHLV and LDS of Biodiversity. Includes the Brett Aggregates offices. Immediately to the north and west is the Oare Gunpowderworks country park, which is a scheduled Ancient Monument.	Park land	No	2.8	Outside the built up area	B class uses	Industrial	Site is within 'Area of High Landscape Value (DM24)' and 'Local Designated site of biodiversity (DM28) and Kent Minerals Safeguarded Area (Brickearth). This area is beyond Sittingbourne's built-up area boundary, and the Local Plan (pol ST3) considers such areas to be located in open countryside, where the primary objective is protection from isolated and/or large scales of development. The north western half is within a 'Scheduled Monument' (DM34) and Kent Minerals Safeguarded Area (River Terrace).	No recent planning history (5 years)	Local nature and landscape designations are major constraints.	Major	Not available in the plan period	Some frontage on the Western Link, but site screened from the road.	Opposite Oare Rd industrial estate, but immediate neighbouring uses are leisure related - country park to the north.	Foodstore opposite, and town centre 1.8kms.	Good
SBC17/100	Halfway Egg Farm, Featherbed Lane, Iwade	 SBC17/100: Halfway Egg Farm, Featherbed Lane, Iwade Contains Ordnance Survey data (c) Crown copyright and database right 2018.	Rural	White land in a key location within the Iwade Important Local Countryside Gap. Open land either side, no other employment uses nearby.	Agricultural	No	2.9	Outside the built up area	Light Industrial (B1c)	Industrial	Within Important Local Countryside Gaps (DM25) policy area, and Kent Minerals Safeguarded Area (Brickearth). This area is beyond a built-up area boundary, and the Local Plan (pol ST3) considers such areas to be located in open countryside, where the primary objective is protection from isolated and/or large scales of development. Proposed housing allocation directly to the north.	Halfway Egg Farm. 14/505074/PNBCM - Change of use agri building to dwelling house. Granted Dec 2014	Critical part of the Important Local Countryside Gaps.	Major	Not available in the plan period	Medium prominence on a busy junction to the A249.	Mostly agricultural with new residential to the north.	Limited provision in Iwade 1 km, with Sittingbourne 5.8 kms.	Reasonable

1 BASIC INFORMATION CfS ID.	2 Name	21 *Internal environment* Any problems with shape, gradient, boundary etc.?	22 Score	23 *Strategic accessibility (road)* Proximity to Mway / principal roads [kms]	24 Score	25 *Local access by road* Quality of access to the principal road network	26 Score	27 *Public transport access* Is the site close to a railway station (within 400m)?	28 Station name & number of bus stops	29 Score	30 *Market Signals* Evidence of developer / occupier interest?	31 Other market intelligence e.g. market history (how long on the mkt), competing supply nearby, occupiers known to be moving in/out.	32 Score	33 Is the site likely to be attractive to employment occupiers?	34 REVIEW / RECOMMENDATION Comments	35 Is the site suitable for employment use?	36 POTENTIAL EMPLOYMENT AREA (Ha)
SBC17/092	Land at Sittingbourne Golf Centre, Church Road, Tonge	None	Excellent	J5 M2 11km, via A249 (via Swale Way) 4km. A longer distance than via the A2, but a better quality / appropriate route.	Good	Will need spur onto Swale Way, which with the A249 is a route suitable for heavy goods vehicles.	Good	No	0	Very poor	Unknown	Currently has poor access, but should the new northern link road be completed it would unlock the site and be attractive to occupiers. Its proximity, close to Euro link - established employment location -would be attractive to occupiers and developers.	Reasonable	Yes	Should the northern link road be delivered making this site accessible and the policy context be favourably reviewed then this site could be suitable for employment use.	No	
SBC17/093	Land between A2 and M2 (to north, south, east and west of Kent Science Park)	No known issues.	Good	J5 M2 7.1 km	Good	Whilst the Mway junction is comparatively close, the access roads to reach it are narrow country lanes and not suitable for large vehicles or higher volumes of vehicles.	Poor	No	0	Very poor	Being actively promoted.	See main report for market analysis - Proposed site is very large and would be developed over a long period of time. Occupiers would be interested in the area, as long as road access was significantly improved. The market for science park expansion in this location is unproven given the scale and nature of similar facilities elsewhere.	Reasonable	Yes	This site is discussed in the main report. This is a complex site and contingent on the provision of new access. Should the access be provided then there is scope to growth the quantum of employment generating space - with potential to accommodate some of the specialist and non-specialist office, R&D and light industrial space as part of expansion of KSP. As the report notes the mostly likely end use 'template' would be similar to Milton Park (Didcot) - i.e. a mixed general employment site with a science park or technology 'nucleus' .	Yes	20
SBC17/094	Land adj to A2 at Love Lane and west of Salter's Lane to Brenley Corner	Bisected by the railway line, otherwise no known issues.	Reasonable	Js 6&7 M2 2.2 km..	Excellent	The route to both junctions (Canterbury Rd and A251 and London Rd) are generally good.	Excellent	No	1	Poor	Not for employment	see Land East of Faversham	Reasonable	Yes	Given the that the planned focus for growth and development in the current plan is towards Sittingbourne, significant new employment allocations for industrial / warehousing in Faversham could not be justified at the moment. But should this strategy change, the population (and so need for jobs) grow, then protecting the most accessible sites for new employment uses (such as those close the A2/A299 interchange) should be a priority. To balance new housing growth with local job growth Faversham will need to offer high quality sites that can compete for footloose demand in the wider Kent market. This may mean diversifying the economy and exploring demand for new forms of employment generating uses in Faversham, including larger unit demand.	No	
SBC17/095	Hartlip Industrial Estate, Hartlip	No, regular green field site,	Good	M2 J4 in 7.7 kms. Immediate access to A2.	Reasonable	Good dedicated junction on A2. But link to M2 J4 is via route through Gillingham.	Reasonable	No	0	Very poor	Unknown	The site could accommodate expansion of the existing activity immediately to the north, which appears to be heavily utilised, and would benefit from shared infrastructure. The site is unlikely to be of interest to other developers because it lacks good access and is remote from other main employment areas.	Reasonable	Yes	This is a existing rural employment site in the countryside that appears to operate as a cold store in connection with the port. Owner seeking additional expansion land to the South of the existing developed area. This would not be a location we would expect to see additional employment provision. While access to the A2 is reasonable the site is in the open countryside and there are better situated sites available to accommodate need. But there may be local justification to allow additional land where this is needed to meet the need for additional space from existing operators - balancing the considerable cost a firm seeking expansion may face in moving to new site with other policy considerations which would generally suggest this site is not taken forward. In summary, allocation could only be justified for the expansion of the existing large unit on site with any new demand accommodated elsewhere.	Yes	5.9
SBC17/097	Bysing Wood Road, Faversham	Irregular shape.	Reasonable	J6 M2 4kms (via Western Link, London Road and A251).	Good	Good immediate access to Western Link from Bysing Wood Road.	Good	No	4	Reasonable	Unknown	Located close to existing employment area, and is reasonably close to local amenities, this site would be attractive to occupiers. The site also benefits from existing access which would reduce development costs.	Good	Yes	Whilst the eastern side of the Western Link road is occupied by employment and other uses, the western side is largely parkland and low intensity activity. In this location adjacent to the Country Park it is considered employment uses would not be appropriate.	No	
SBC17/100	Halfway Egg Farm, Featherbed Lane, Iwade	None	Good	J5 M2 7.8kms via Sheppey Way and through Bobbing and A249.	Good	Sheppey Way is suitable for large vehicles. Access to the A249 also possible via B2005, but requires a loop through Iwade.	Reasonable	No	2	Poor	Being actively promoted.	Site is well located on a junction of the A249, this would be attractive to occupiers as it provides good connectivity and prominence. Developers would be attracted to the existing road infrastructure.	Good	Yes	As with other sites east of the A249 there is no justification to allocate new small sites here at the moment. Should significant land be promoted east of the A249 in the next plan, this changes the context of this area, and so the site may become suitable, subject to a favourable review of the policy context.	No	

1 BASIC INFORMATION CfS ID.	2 Name	3 Location map	4 Market Area	5 Site description	6 Current use	7 Is the site previously developed land?	8 Area (ha)	9 Sequential location	10 Proposed principle use	11 Principle land use (office/indl)	12 Any planning designations	13 Planning History	14 CONSTRAINTS Detail any constraint(s) to delivery of whole or part of site? (inc. physical and policy)	15 Overall constraints?	16 Is this site available?	17 ATTRACTIVENESS TO OCCUPIERS *External environment* Prominence of site	18 Compatibility of surrounding uses	19 Access to amenities	20 Score
SBC17/101	Land north of Canterbury Road, Dunkirk	SBC17/101: Land North of Canterbury Road, Dunkirk	Rural	Agricultural land to the rear of an existing employment site that predominantly serves the local consumer market.	Agricultural	No	3.4	Adjacent to the built up area	Light Industrial (B1c)	Industrial	Within Area of High Landscape Value (Kent Level) and beyond a built-up area boundary, and the Local Plan (pol ST3) considers such areas to be located in open countryside, where the primary objective is protection from isolated and/or large scales of development.	Entire site. 17/500313/OUT - Outline application for 49 dwellings with B1 and A1 units. Refused August 2017. Appeal dismissed.	Local landscape designation.	Major	Not available in the plan period	Medium - on the route into the village centre, but not visible from the A2.	Industrial uses immediately adjacent, but also residential to the west. Agriculture and woodland to the north.	Limited provision in Boughton 1.5 kms, and Canterbury 7kms.	Reasonable
SBC17/105	Land east of Faversham	SBC17/A: Land to the East of Faversham	Faversham	Agricultural land to the east of the existing Lady Dane Farm allocation.	Agricultural	No	42.9	Outside the built up area	B class uses	Industrial	This area is beyond Faversham's built-up area boundary, and the Local Plan (pol ST3) considers such areas to be located in open countryside, where the primary objective is protection from isolated and/or large scales of development. Site is mostly covered by Kent Minerals Safeguarded Areas (Brickearth).	South western corner. 15/502738/FULL storage of 44 seasonal caravans. Granted Aug 2015.	The site rises up over the open countryside to the east that Policy St3 is designed to protect.	Major	Not available in the plan period	Site has A2 frontage, and whilst currently well screened if developed would be visually prominent.	Agricultural and MU6 development site to the west.	Limited provision on Selling Road. Town centre 2 kms.	Reasonable
SBC17/119	Milstead Manor Farm, Manor Road, Milstead	SBC17/119: Milstead Manor Farm, Manor Road, Milstead	Rural	Farm buildings used for local service provision (such as joinery) in the AONB and close to an Local Designated Site of Biodiversity.	Employment	No	0.8	Outside the built up area	Light Industrial (B1c)	Industrial	Within Kent Downs Area of Outstanding Natural Beauty (DM24) and outside of settlement boundaries so Policy ST3 applies..	Entire site. 17/502135/FULL - Demolition of the existing buildings and erection of nine residential dwellings. Refused July 2017. Appeal dismissed.	Site is within the AONB. Whilst reuse of the existing buildings is possible, expansion would not be supported.	Major	Not available in the plan period	Low - due to location on a country lane.	Surrounded by agriculture. Existing local servicing related activities in former farm buildings are compatible.	Nothing in immediate vicinity. Sittingbourne 6.1 kms.	Very poor

1 BASIC INFORMATION	2	21 *Internal environment*	22	23 *Strategic accessibility (road)*	24	25 *Local access by road*	26	27 *Public transport access*	28	29	30 *Market Signals*	31	32	33	34 REVIEW / RECOMMENDATION	35	36 POTENTIAL EMPLOYMENT AREA
CfS ID.	**Name**	**Any problems with shape, gradient, boundary etc.?**	**Score**	**Proximity to Mway / principal roads [kms]**	**Score**	**Quality of access to the principal road network**	**Score**	**Is the site close to a railway station (within 400m)?**	**Station name & number of bus stops**	**Score**	**Evidence of developer / occupier interest?**	**Other market intelligence e.g. market history (how long on the mkt), competing supply nearby, occupiers known to be moving in/out.**	**Score**	**Is the site likely to be attractive to employment occupiers?**	**Comments**	**Is the site suitable for employment use?**	**(Ha)**
SBC17/101	Land north of Canterbury Road, Dunkirk	None	Good	M2 J7 4.4kms (via minor roads).	Good	The access route - Canterbury Road to the M2 J7 is narrow in places and goes through settlements.	Poor	No	2	Poor	Being actively promoted.	Existing small scale estate to the south is well occupied, and part of this site could form an extension. Close proximity to residential may be off putting to some occupiers depending on their operation. Existing road infrastructure and services would be attractive to a developer.	Reasonable	Yes	This would be an extension to a small existing local site - which is currently used for low density local employment including storage and a transport depot. In general some small rural allocations could be supported where they provide employment to meet local needs and/or service the rural economy. In it's favour the site has reasonable access to the A2, albeit to avoid additional traffic running though the villages to access the SRN this requires traffic heading west to first head east. But weighing against this is the very small size of Dunkirk Village, and so the very limited need in the immediate settlement. Also, the fact that the majority of the land in employment use does not appear to be directly related to the rural economy (the depot) and the rationale to provide additional space to grow these uses in the rural areas is limited. Also, there are better located sites for (and allocated undeveloped) new employment only a few minutes drive away, and in possibly preferable locations around Faversham. On balance, without significant new housing generating a need for local employment in the area, an extension could not be supported.	No	
SBC17/105	Land east of Faversham	None other than the land rises to the open countryside to the east.	Reasonable	J7 M2 1.5 kms, & J6 3 kms.	Excellent	New access on to A2 required. The route to the M2 J6 (Canterbury Rd and A251) is generally good.	Good	No	0	Very poor	Being actively promoted.	If developed this would be attractive to occupiers. There is demand for light industrial and hybrid industrial/office in Faversham, and what stock there is has low vacancy. But the site is further away from the town centre than other established employment areas, and in Faversham occupiers require access to amenities.	Reasonable	Yes	Given the that the planned focus for growth and development in the current plan is towards Sittingbourne, significant new employment allocations for industrial / warehousing in Faversham could not be justified at the moment. But should this strategy change, the population (and so need for jobs) grow, then protecting the most accessible sites for new employment uses (such as those close the A2/A299 interchange) should be a priority. To balance new housing growth with local job growth Faversham will need to offer high quality sites that can compete for footloose demand in the wider Kent market. This may mean diversifying the economy and exploring demand for new forms of employment generating uses in Faversham, including larger unit demand.	No	
SBC17/119	Milstead Manor Farm, Manor Road, Milstead	Restricted to using existing buildings.	Poor	J5 M2 9.2 kms via country lanes.	Reasonable	Via Bexon Lane and Oad Street	Very poor	No	0	Very poor	Unknown	Poor connectivity, rural location and poor prominence would be unattractive to occupiers.	Poor	No	The location in AONB and the very poor access arrangements are the major factors precluding any more than reuse of existing buildings in this location.	No	

APPENDIX G SWALE POLICY

Loss of employment floorspace and land

The Borough's stock of employment sites are generally well occupied and in market demand.

The Council will seek to retain sites within the B use classes and associated Sui Generis uses (employment use).

The Council will also keep undeveloped, allocated land, for future employment use.

Where a change is proposed, which involves the release of employment floorspace or land then the Council will expect supporting evidence to demonstrate that the site (or floorspace) has no reasonable prospect of being taken up.

This includes demonstrating that there is no reasonable prospect that the floorspace can be re-occupied and, where appropriate, the land redeveloped for a new employment use.

To support the proposed loss of space the Council expects applicants to provide robust marketing information demonstrating that sites cannot remain in an employment generating use.

Marketing evidence should demonstrate that:

- that both the land and the premises have been widely advertised and marketed for a wide range of economic uses for at least one continuous year immediately prior to submission of a relevant planning application.
- This should include offering the site for both freehold and leasehold interest at values reflective of the current market. Information should be provided to demonstrate that the values sought were reflective of the market; including benchmarking with similar properties (or land) in the market area.
- Information should be provided detailing any interest received from potential buyers or tenants since the marketing commence. Where interest has been received and that interest has not been pursued, this must be explained.
- Where sites are undeveloped, or property needs to be redeveloped, then viability testing of indicative schemes may be appropriate given the lack of property on site to offer to perspective tenants.

For allocated sites, which are not yet developed, these should be released via a plan review. This reflects the fact that our allocated sites, made in this plan, are not expected to be developed for a number of years. These development sites are our medium and long-term reservoir of sites intended to allow the economy to respond flexibly across the economic cycle and the plan review process is the best place to make these judgements.

In exceptional cases, a release may be considered 'mid plan' but in which case we would expect to see a much more prolonged period of marketing before concluding that the site has no reasonable prospect (at least two years).

Potential applicants are encouraged to seek the advice of the Council prior to seeking planning permission as regards their proposed marketing strategy. There may be cases where, on balance, a new employment use would not be supported by nature of the sites location or characteristics. Where applicants can clearly demonstrate that the site is not appropriate for ongoing employment use, by nature of its access or other limiting features, then marketing evidence will not be necessary. In preference, this should be agreed before the application being made.

Mixed-use redevelopment and renewal

Where an employment site cannot remain in employment use applicants should first consider whether a mixed-use approach could offset part of the loss of employment generating space. That is before considering total loss.

In considering this approach applicant should aim to replace a quantum and quality of space which is in demand. In parts of the Borough this may be to meet the demand for small unit industrial or workshop space regardless of the fact that other uses (for example offices) could deliver more jobs as part of any mixed-use redevelopment. In general office based employment should not be used to offset the loss of industrial land or floorspace.

Local Plan Panel Meeting	
Meeting Date	20 September 2018
Report Title	Swale Local Development Scheme and Local Plan Budget
Cabinet Member	Cllr Gerry Lewin, Cabinet Member for Planning
SMT Lead	Emma Wiggins
Head of Service	James Freeman
Lead Officer	Gill Harris
Key Decision	Yes
Classification	**Open**
Recommendations	1. The Local Development Scheme (LDS) at Appendix I to this item be recommended to Cabinet for adoption as the current programme for the Swale Borough Local Plan Review; and that the date this LDS is effective from will be the date of ratification of this recommendation by Cabinet. 2. Members note the budgetary arrangements at Appendix II to this item which have been put in place to support the Local Plan programme.

1 Purpose of Report and Executive Summary

1.1 A Local Development Scheme (LDS) is the programme for production of local development plan documents and is required to be produced, monitored and kept up to date under Section 15 of the Planning and Compulsory Purchase Act (2004). The Panel is requested to recommend that this Local Development Scheme at Appendix I to this item should be adopted as the programme for the Swale Local Plan Review, which has already commenced.

1.2 The item also includes a summary of the Local Plan budget which will be required to support this programme, which was requested by Members at a previous Panel meeting.

2 Background

Local Development Scheme

2.1 Local Development Scheme is required under section 15 of the Planning and Compulsory Purchase Act 2004 (as amended by the Localism Act 2011). This must specify (among other matters) the documents which, when prepared, will comprise the Local Plan for the area. It must be made available publically, displayed on the web site and kept up-to-date. The last LDS adopted for Swale was dated October 2016 and covered the latter stages of the Bearing Fruits Local Plan process.

2.2 Reviews of Local Plans at least every five years are a legal requirement (Regulation 10A of the Town and Country Planning (Local Planning) (England) Regulations 2012). Council Minute 44 of 2017 recorded the decision to commence a review, based on the recommendations of the Bearing Fruits Local Plan Inspector's Final Report.

2.3 Since then, a new National Planning Policy Framework (NPPF) has been adopted (July 2018), which confirms the Government's commitment to a step change in housing targets and delivery of targets. Early public and stakeholder engagement on the challenges the Swale Local Plan review will need to tackle has already been undertaken. Now that the NPPF is finalised, commissioning the outstanding areas of evidence required to inform the content of the review is also being put in hand. Reporting on the consequences of the new NPPF polices themselves for the extent of the review is anticipated for reporting to the October meeting of the Panel. An appropriate programme (based on these practicalities) and to reflect the statutory stages of the plan process is required to be in accordance with the Statutory Regulations.

2.4 The LDS programme proposed to achieve adoption of a Local Plan Review is set out at Appendix I to this item. It represents an extremely tight schedule to ensure that an up to date Local Plan is in place and is compliant with the new NPPF and regulation.

2.5 In accordance with the regulations, it includes those element of the development plan for which the Council is responsible for producing. For Swale, this comprises the Local Plan itself. Although a Neighbourhood Plan is under production for Boughton and Dunkirk Parish area and will form part of the development plan for the Borough, its programming is not the Borough Council's remit. A Community Infrastructure Levy programme is not yet included in the LDS. If pursued, it is likely that it would be in parallel with the Local Plan itself. A decision on whether it is appropriate for the Council to set a CIL charge may be in itself dependent on the Local Plan development strategy the Council prefers to pursue and viability assessments of it. This may need to be reviewed and included in a revised LDS if appropriate to do so.

2.6 The LDS is effective from the date of the resolution to adopt it (the relevant Minute). The LDS can be reviewed at any time by the Council if there is good reason to do so, subject to a further Council Minute to confirm adoption of a revised programme.

2.7 Progress on achieving the milestones in the LDS should be reported in the Annual Monitoring Report.

Local Plan Budget

2.8 The total annual project budget for the Local Plan has remained at £91,190 since the inception of the Bearing Fruits Local Plan (2008-09). Of this total some 13% goes to meet the Council's commitments to Kent Wildlife Trust; Kent Downs AONB Management and Kent Design. The remainder is focused on the Local Plan project. Any unspent budget at the end of each year rolls over into a reserve fund, due to the long term nature of the project and uneven expenditure throughout the process. This system proved adequate for the Bearing Fruits plan due to the long period over which it was prepared (due largely to the impact of major changes in national policy with the introduction of the first NPPF in 2012), with the local plan project work totalling some £716,000 over 9 years.

2.9 For the year 2018-19 officer costs for the Local Plan team are expected to be £377,820. It should be noted however that the team's duties are not confined to local plan production and includes other work streams such as neighbourhood plan; working up infrastructure funding bids; involvement under the Duty to Cooperate in other authorities planning documents; housing and employment land monitoring; Kent Downs AONB work; policy support for Development Management decision making and Appeals; and assisting other Council teams with project work which has planning input.

2.10 A summary of costs anticipated over the remainder of the Local Plan Review process and budgetary provision to meet them is set out at Appendix II.

2.11 The lion's share of the evidence base to support the Local Plan Review will need to be commissioned in the first year or two of the process, to support decision making on reasonable alternative strategies and options and subsequently, the most appropriate development strategy for the plan.

2.12 Transport modelling costs are the most expensive element of the evidence required. Costs for the production of a base model have been shared with Kent County Council Highways (KCCH) and Quinn Estates. Testing future development scenarios (building on this base work) will aid decision making on the Local Plan Review. Costs for this element will be shared with Kent County Council Highways only. Procurement for this stage of the modelling is being led by KCCH. The brief for the future scenario testing is still being worked up and consequently the cost and precise share of for this part of the work is not yet finalised, but a sum of £100,000 represents a maximum for Swale under this budget. Some claw back on the base modelling costs may be possible by making it available for developers to use in preparing Transport Assessments.

2.13 The Examination in Public (EIP) costs represent another major area of expenditure, which, based on the experience of the Bearing Fruits Local Plan (and the experience of other local authorities) is likely to be a two stage EIP to allow for examination of Main Modifications. This is likely to amount to £160,000 in Planning Inspectorate, legal and expert witness costs and allowance for this has been included in the budget.

2.14 The Sustainability Appraisal which is statutorily required at key stages throughout the process is another major element of the local plan production cost at £88,500.

2.15 Over the period from 2018-19 to 2022-23 it can be seen that the overall expenditure on the local plan review itself is expected to be £690,775. This is a little less than the Bearing Fruits Plan, although it is based on an assumption that prices will not increase significantly. If other planning policy commitments (including the provision for Kent Downs AONB management; Kent Wildlife Trust, Kent Design; and a Vehicle Parking SPD) are included, the total cost for planning policy projects is £773,775.

2.16 As, five yearly reviews of plans are now compulsory, and there is still a requirement for significant pieces of supporting evidence, as well as Examination in Public costs, the overall costs of production are being compressed into a shorter time period. Commissioning the evidence base is of necessity front loaded into the early years of the process and even using the rollover facility of the local plan budget codes to manage spending, would result in the project being over budget over its programmed timescale.

2.17 Consequently an increase in the budget of £150,000 was requested in year 2018-19 to enable the work on the current local plan to proceed in a timely manner and this was agreed at Cabinet at their meeting of 11 July 2018 (Minute 112). Modest MHCLG non ring fenced grant sums are expected in 2018 – 2021 to cover additional costs of dealing with self and custom build housing requirements. To date these costs have been minimal and the matter is likely to require new policy through the Local Plan Review to make suitable land allocations for this type of development.

2.18 The summary at Appendix I shows that with this budget enhancement the Local Plan Review can be accommodated within a five year programme and other planning policy commitments can be met, with a modest contingency of £24,807 to cover any unforeseen or underestimated pieces of work which may incur costs over the review period.

2.19 In order to deal with the compressed workload being generated by the shortened timescale and the new areas of work arising from the new NPPF particularly in respect of addressing the uplift in housing numbers (which will include looking at the potential for use of new garden settlements and urban extensions) and the complex supporting infrastructure those housing numbers will need, an additional Principal Planning Officer has been recruited to the Local Plan team from August 2018. This will also help to address the issues arising from increasing delivery of housing, which the government is expecting councils to take a pro-active role in. The officer cost of dealing with any new settlement pre–application work and proposals is expected to be partly offset through PPA agreements for any such proposals.

3 Proposals

Local Development Scheme

3.1 The Local Development Scheme at Appendix I is proposed as the programme to achieve Local Plan Review. It will require a council minute to adopt it as such and Panel are asked to recommend to Cabinet that it be adopted for the purposes of guiding and monitoring progress on the Local Plan review. The date it becomes effective will be the date of the relevant Cabinet decision and Minute to adopt it.

Local Plan Budget

3.2 Members are invited to note the budgetary provisions for the Local Plan Review set out at Appendix II to this item.

4 Alternative Options

4.1 Production and maintenance of an up to date LDS is a statutory requirement and guides the timetable for production of development plan documents. It is required as part of the suite of documents to be submitted with the Local Plan for Examination in Public. Without it the plan could be found unsound. There is no realistic alternative to compliance with this requirement, so non adoption of the LDS is not recommended.

4.2 The Swale LDS itself is required only to show the programme of production for documents which comprise the development plan (strategic and non strategic policies and Neighbourhood Plans). Previously Swale LDS have shown other documents such as SPDs and the Heritage Strategy in some detail. As these are not part of the development plan, they are not being shown in the same way.

4.3 In respect of the Local Plan project budget, the NPPF requires the local plan to be underpinned by a relevant, up to date and proportionate evidence base. This needs to be adequately resourced, as do the later Examination in Public stages of the process. Inadequately resourced evidence creates a high risk of challenge and unsoundness. The reduced timescale for production of local plans to five years has resulted in compressing of costs into a shorter timescale and the need for additional budgetary provision, which has been made available and should enable the project to be completed satisfactorily assuming no major unforeseen issues or cost increases arising. A lesser budgetary provision would not support timely production of a sound local plan review and is not recommended.

5 Consultation Undertaken or Proposed

5.1 The Local Plan itself is subject to public engagement or consultation at several points in the process. The LDS programme indicates when these are expected to take place. There is no requirement for the LDS to be subject to consultation.

5.2 Budgetary provision for the Local Plan Review is tackled through the Council’s normal budget setting procedures.

6 Implications

Issue	Implications
Corporate Plan	This section should provide details of how the proposals in the report align with the strategic objectives of the corporate plan. Further guidance on this section can be obtained from the policy team.
Financial, Resource and Property	The Local Plan will be progressed in accordance with the project budget allocated to it, as set out in this report. The figures have been checked and confirmed by Financial Services.
Legal, Statutory and Procurement	A Local Development scheme is required under section 15 of the Planning and Compulsory Purchase Act 2004 (as amended by the Localism Act 2011) and a Council minute confirming its adoption will be needed. Most of the commissions for evidence base to support the Local Plan have been procured using the Bloom Procurement Framework which the Council subscribes to. Procurement of transport modelling has been led by Kent County Council Highways.
Crime and Disorder	None identified at this stage.
Environment and Sustainability	The Local Plan will be supported by its own Sustainability Appraisal and Habitats Regulation Assessment at each key stage in decision making.
Health and Wellbeing	None identified at this stage
Risk Management and Health and Safety	None identified at this stage.
Equality and Diversity	None identified at this stage, although the Local Plan Review itself will be subject to equality impact assessments at key stages as advised by the policy team.
Privacy and Data Protection	None identified at this stage

7 Appendices

7.1 The following documents are to be published with this report and form part of the report:

- Appendix I: Swale Local Development Scheme (September 2018)
- Appendix II: Local Plan Budget Summary

8 Background Papers

None

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Swale Borough Council

Local Development Scheme

September 2018

1. Introduction

1.1 Swale Borough Council is required to prepare and maintain a Local Development Scheme (LDS) in accordance with Section 15 of the Planning and Compulsory Purchase Act 2004 (as amended by the Localism Act 2011).

1.2 This LDS will come into effect upon agreement by the Council's Cabinet on XXX September 2018.

1.2 As set out in the Planning and Compulsory Purchase Act 2004 (Section 15) the LDS must specify:

a) The local development documents which are to be development plan documents;

b) The subject matter and geographical areas to which each development plan document is to relate;

c) Which development plan documents (if any) are to be prepared jointly with one or more other local planning authorities;

d) Any matter or area in respect of which the authority have agreed (or propose to agree) the constitution of a joint committee under section 29;

e) The timetable for the preparation and revision of the development plan documents

1.3 The LDS is a project plan which sets out the timetable for the production of new or revised development plan documents which will form the Council's Local Development Plan. This LDS sets out a work programme for the Council's Local Plan Review over the period to Spring 2023 and anticipated adoption of the review. Progress against this LDS will be reviewed annually through the Authority Monitoring Report.

1.4 The Council produced its first LDS in 2005, followed by subsequent revisions in 2008, 2010, 2015, and 2016. These related to the former Local Plan (Adopted Feb 2008); and the current adopted Local Plan 'Bearing Fruits' (Adopted July 2017). The extended process which evolved as a result of the National Planning Policy Framework (NPPF) and move toward a single Local Plan system was reflected in a number of LDS revisions to achieve adoption of the Bearing Fruits Local Plan.

1.5 This LDS is now re-drafted with a fresh programme for Local Plan Review, which will need to address challenges for development raised by the National Planning Policy Framework (NPPF) July 2018; and new statutory requirements for the five yearly review of local plans.

2. The current adopted development plan documents for Swale

2.1 The current statutory adopted elements of the development plan for Swale Borough are:

- Bearing Fruits 2031: The Swale Borough Local Plan (Adopted July 2017)
- Faversham Creek Neighbourhood Plan (Adopted June 2017)
- Kent Minerals and Waste Local Plan 2013 – 2030 (Adopted July 2016)

3. Current Supplementary Planning Documents (SPD)

3.1 The Local Plan is supported by a number of existing and proposed Supplementary Planning Documents and Supplementary Planning Guidance which set out the details for implementing local plan policies. All of these documents were subject to public consultation. These can be viewed at https://www.swale.gov.uk/local-planning-guidance/ .

3.2 Currently adopted SPD for the Borough are:

- Developer Contributions SPD (Adopted November 2009)
- Swale Landscape Character and Biodiversity Appraisal SPD (2011)
- Stones Farm Development Brief SPD (May 2011)
- Queenborough and Rushenden Masterplan SPD (November 2010)
- Sittingbourne Town Centre and Milton Creek Masterplan SPD (September 2010).

3.3 Supplementary Planning Guidance (SPG) documents are:

- The Conversion of Buildings into Flats and Houses in Multiple Occupation
- Listed Buildings - A Guide for Owners and Occupiers
- The Conservation of Traditional Farm Buildings
- The Design of Shop fronts, Signs and Advertisements
- Designing an Extension - A Guide for Householders
- Planting on New Developments - A Guide for Developers
- The Erection of Stables and Keeping of Horses
- Conservation Areas
- Lynsted Parish Design Statement
- Abbott Laboratories Ltd - Development Brief

3.4 Additionally part of the Kent Downs Area of Outstanding Natural Beauty falls within Swale and has a management plan which has been adopted by all of the local authorities who have part of this AONB within their area. This is used as a material consideration for planning applications and can be viewed at:

https://www.kentdowns.org.uk/planning/aonb-mp-planning/

4. Other Relevant Documents

Statement of Community Involvement

4.1 The Swale Statement of Community Involvement (February 2018) has been reviewed and updated. This sets out the Council's approach to public and key stakeholder participation in all planning matters, including the preparation of the local plan, supplementary planning documents and arrangements for consultations on planning applications.

Sustainability Appraisal

4.2 The council will meet the requirements of sustainability appraisal throughout the local plan preparation process, which will involve carrying out iterative appraisals of the sustainability of the options, proposals and draft policies in the local plan and prepare reports on the findings. These will be carried out at the key stages of plan preparation and will inform progress on the Plan. The sustainability appraisals carried out at the key stages of plan preparation will also accompany consultation drafts of the plan for public comment.

Authority Monitoring Report

4.3 The Council publishes monitoring information on its website on an annual basis relating to the previous monitoring year (which runs 1April – 31 March). This will provide updates on the status of the LDS timetable; progress on the Local Plan Review; reports on public consultations; duty to cooperate consultations; neighbourhood planning and borough wide statistics on planning topics such as housing, employment, environment and transport.

Policies Map

4.4 The Council is required to produce a Policies Map which shows the location of development proposals in all current, adopted development plan documents on an ordnance survey base map. For Swale, this is the Proposals Map which accompanies the Bearing Fruits Local Plan (2017) (the area annotated as Policy NP1 denotes the area covered by the Faversham Creek Neighbourhood Plan).

5. Emerging Development Plans for Swale

Swale Borough Local Plan Review 2022 - 2038

5.1 The Local Plan review will set the vision and framework for development needs for the whole of Swale Borough area from 2022- 2038. This will include addressing revisions to the National Planning Policy Framework and associated Practice Guidance (2018); addressing housing need; the local economy; environmental considerations; community infrastructure needs; plus transport and other physical infrastructure needs. The plan will include strategic policies to address these matters and put forward a development strategy for the Borough. It will also include site specific allocations to meet identified need and retain; update, or include new detailed topic development management policies to guide determination of planning applications.

5.2 Work began on the Local Plan Review as a result of Council Minute 44 (July 2017), with early scoping and evidence gathering, within the context of major review of national planning policy and Government policy to significantly boost housing delivery. The key stages of the process are set out at Appendix 1. The complete timetable for the production and public examination of the Local Plan Review is set out at Appendix 2.

5.3 Although the Council is keeping up Duty to Cooperate consultation with neighbouring planning authorities and on the London Plan, to identify potential cross boundary issues (which may in due course require Statements of Common Ground to comply with the NPPF 2018), no scope or intention for joint plan making has been identified at this point in time.

Community Infrastructure Levy (CIL)

5.4 CIL is a mechanism introduced under the Planning Act 2008 with the intention of providing a consistent approach to determining financial contributions from new development towards local infrastructure provision. Further revisions to national policy and regulation on CIL in 2018 and the approach to viability assessments affecting plan making, mean that at this early stage in the Local Plan Review process, it is unclear whether implementing a CIL charge would be of benefit to Swale. This issue will need to be reviewed (and, if appropriate, included in a future review of this LDS) when more progress has been made on identifying reasonable alternative development strategies for testing and consultation.

Neighbourhood Plans

5.5 The Boughton and Dunkirk Neighbourhood Pan area was designated in February 2014 and is still under preparation.

5.6 A Minster Neighbourhood Plan (Sheppey) area was also designated in February 2014 but has not been progressed

5.7 Although neighbourhood plans, once adopted, form part of the development plan, they are not programmed by the local planning authority and are therefore not included within this LDS timetable. They must be in general conformity with the strategic policies of the adopted local plan and have regards to any emerging local plans. More details for Swale neighbourhood plans can be found at: https://www.swale.gov.uk/neighbourhood-planning/

Supplementary Planning Documents

5.8 It is the Council's intention to prepare a Swale Vehicle Parking Standards SPD pursuant to adopted Bearing Fruits Local Plan policy. As SPDs are not development plan documents (that is allocating land or making new policy), they are not required to be part of the official LDS programme. For information however, Appendix 3 gives an indicative programme for the production of this SPD.

6. Resources and Project Management

6.1 Swale Borough Council has strong corporate commitment to the preparation and adoption of a Local Plan review. The Swale Local Plan Review will be produced by the Council's Planning Service, and led by the Local Plan Team. The importance of the work is recognised and supported across the authority with input and expertise from other teams across the Council; and the use of outside consultants (where appropriate); plus engagement with stakeholders; organisations and the public to help inform and develop the plan.

6.2 The Council has established management and reporting structures to support delivery of the local plan. This is primarily the Local Pan Panel cross party Members group which makes recommendations to Cabinet for decision. In addition briefings for senior managers and Members on key pieces of research or new national policy are used.

Appendix 1: Swale Local Plan Review Key Stages

Event	Date
Local Plan Review Commenced (Council Minute 44)	July 2017
Scoping Issues Public Engagement (Regulation 18) Evidence gathering and engagement om emerging issues, options and challenges. Evidence gathering may continue throughout the process to reflect changing circumstances at the local level, national policy change, or to comply with an Inspector's request.	27 April – 8 June 2018
Local Plan Panel Steer on reasonable alternative development strategy for Issues & Options + Preferred Option (Reg 18)	June 2019
Issues and Options & Draft Preferred Option Document to local Plan Panel	Sept 2019
Issues and Options & Draft Preferred Option Public Consultation (Reg18)	Oct - Dec 2019
Local Plan Panel receive consultation results and recommend Preferred Option for working up	May 2020
Local Plan Panel / Full Council cycle agree Publication Version of Local Plan for consultation and submission for Examination in Public	Sept - Oct 2020
Publication of Preferred Local Plan for public Consultation (Reg 19)	Nov - Dec 2020
Submission of Plan for Examination (with results of the public consultation) (Reg 22)	April 2021
Examination in Public of the Local Plan 1	Nov 2021
Inspector's Interim Findings – at this stage the Examination in public is still open and the Inspector is leading the process	Jan 2022
Main Modifications which arise from the Inspector's Interim Findings. These are agreed by the Council and subject to public consultation before further discussion at Examination in Public.	April 2022
Examination in Public 2	Autumn 2022

Inspectors Final Report This is binding on the local planning authority and, subject to the Inspector's findings, will enable the local authority to adopt the Local Plan review subject to any of the Main Modifications which the Inspector deems necessary to ensure the Plan is sound.	Early 2023
Adoption of the Local Plan Review by Swale Borough Council	Spring 2023

Appendix 2: Swale Local Plan Review Local Development Scheme 2018 - 2022

2018

Documents	J	F	M	A	M	J	J	A	S	O	N	D
Swale Borough Local Plan Review												
Commenced July 2017 (Council Minute 44)												
Scoping Issues Public Engagement 27 April – 8 June 2018 (Reg 18)				C	C	C						
Issues and Options & Draft Preferred Option Consultation Oct - Dec 2019 (Reg18)												
Publication Preferred Option Local Plan Consultation Autumn 2020 (Reg 19)												
Submission of Plan for Examination Spring 2021(Reg 22)												
Examination in Public 1 Nov 2021												
Main Modifications Consultation April 2022												
Examination in Public 2 Autumn 2022												
Inspectors Final Report Jan 2023												
Adoption Spring 2023												

2019

Documents	J	F	M	A	M	J	J	A	S	O	N	D
Swale Borough Local Plan Review												
Commenced July 2017 (Council Minute 44)												
Scoping Issues Public Engagement 27 April – 8 June 2018 (Reg 18)												
Issues and Options & Draft Preferred Option Consultation Oct - Dec 2019 (Reg18)										C	C	C
Publication Preferred Option Local Plan Consultation Autumn 2020 (Reg 19)												
Submission of Plan for Examination Spring 2021(Reg 22)												
Examination in Public 1 Nov 2021												
Main Modifications Consultation April 2022												
Examination in Public 2 Autumn 2022												
Inspectors Final Report Jan 2023												
Adoption Spring 2023												

2020

Documents	J	F	M	A	M	J	J	A	S	O	N	D
Swale Borough Local Plan Review												
Commenced July 2017 (Council Minute 44)												
Scoping Issues Public Engagement 27 April – 8 June 2018 (Reg 18)												
Issues and Options & Draft Preferred Option Consultation Oct - Dec 2019 (Reg18)												
Publication Preferred Option Local Plan Consultation Autumn 2020 (Reg 19)											P C	P C
Submission of Plan for Examination Spring 2021(Reg 22)												
Examination in Public 1 Nov 2021												
Main Modifications Consultation April 2022												
Examination in Public 2 Autumn 2022												
Inspectors Final Report Jan 2023												
Adoption Spring 2023												

2021

Documents	J	F	M	A	M	J	J	A	S	O	N	D
Swale Borough Local Plan Review												
Commenced July 2017 (Council Minute 44)												
Scoping Issues Public Engagement 27 April – 8 June 2018 (Reg 18)												
Issues and Options & Draft Preferred Option Consultation Oct - Dec 2019 (Reg18)												
Publication Preferred Option Local Plan Consultation Autumn 2020 (Reg 19)												
Submission of Plan for Examination Spring 2021(Reg 22)				S	S							
Examination in Public 1 Nov 2021											E	
Main Modifications Consultation April 2022												
Examination in Public 2 Autumn 2022												
Inspectors Final Report Jan 2023												
Adoption Spring 2023												

2022

Documents	J	F	M	A	M	J	J	A	S	O	N
Swale Borough Local Plan Review											
Commenced July 2017 (Council Minute 44)											
Scoping Issues Public Engagement 27 April – 8 June 2018 (Reg 18)											
Issues and Options & Draft Preferred Option Consultation Oct - Dec 2019 (Reg18)											
Publication Preferred Option Local Plan Consultation Autumn 2020 (Reg 19)											
Submission of Plan for Examination Spring 2021(Reg 22)											
Examination in Public 1 Nov 2021											
Main Modifications Consultation April 2022				M C	M C						
Examination in Public 2 Autumn 2022											**E**
Inspectors Final Report Jan 2023											
Adoption Spring 2023											

(pink)	Initial Consultation and Evidence gathering (Regulation 18) = C
(red)	Publication of DPD Consultation = P (Regulation 19)
(blue)	Submission to Secretary of State = S Examination in Public = E Main Modifications Consultation = M Inspectors Final Report =R (Regulations 22 -25)
(green)	Adoption = A
C	Public Consultation Stages

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Appendix 3: Indicative Timetable for Production of Swale Vehicle Parking Standards Supplementary Planning Document

Event	Date
Initial evidence gathering and Member workshops (subject to appointment of suitable consultants)	Autumn 2018
Drafting	Spring 2019
Consultation on Draft SPD	Summer 2019
Finalise Changes and Adopt SPD	Autumn 2019

Appendix II: Local Plan Anticipated Project Budget 2018-19 to 2022-2023

	2018-19	2019-20	2020-21	2021-22	2022-23	Total over local plan review project lifespan 2018-2023	Notes
Local Plan Evidence Base, production and EIP costs	335,922	143,853	30,000	95,000	86,000	690,775	
Other planning policy costs: Kent Wildlife Trust; Kent Downs AONB Management; Kent Design; Vehicle parking SPD	31,600	16,600	11,600	11,600	11,600	83,000	Based on 2017-18 costs for KWT, AONB and KD.
Local Plan Project Annual Budget Allocation	**151,540**	**91,190**	**91,190**	**91,190**	**91,190**	**516,300**	2018-19 includes rolled over grant monies from neighbourhood planning brownfield register and self build grants
Local Plan Reserves Fund 2018-2019	237,282					237,282	Reserve fund has additional £150,000 agreed 12 July 2018.
Self build MHCLG Grant	30,000	15,000	n/a	n/a	n/a	45,000	
Total Project Budget Available	**418,822**	**106,190**	**91,190**	**91,190**	**91,190**	**798,582**	
Total Local Planning Policy	**367,522**	**160,453**	**41,600**	**106,600**	**97,600**	**773,775**	

	2018-19	2019-20	2020-21	2021-22	2022-23	Total over local plan review project lifespan 2018-2023	Notes
budget costs							
TOTAL SHORTFALL /SURPLUS	51,300	-54,263	49,590	-15,410	-6,410	24,807	Local plan project therefore achievable within budget over period 2018-19 to 2022-23, with a limited contingency of £24,807 for unforeseen costs.

Local Plan Panel Meeting	Agenda Item:
Meeting Date	20 September 2018
Report Title	Scoping Report for the Swale Borough Local Plan Sustainability Appraisal (SA)
Cabinet Member	Cllr Gerry Lewin, Cabinet Member for Planning
SMT Lead	Emma Wiggins
Head of Service	James Freeman
Lead Officer	Gill Harris
Key Decision	No
Classification	Open
Recommendations	1. Recommend to Cabinet that they agree the Scoping Report for the Swale Borough Local Plan Sustainability Appraisal (Appendix I to this item) as the scope and SA framework for the Sustainability Appraisal for the emerging Swale Borough Local Plan.

1 Purpose of Report and Executive Summary

1.1 This report updates the Panel on work connected with the preparation of the Scoping Report for the Swale Borough Local Plan Sustainability Appraisal (SA).

1.2 Attached to this report at Appendix I is the Scoping Report for the Swale Borough Local Plan SA, July 2018. The Scoping Report presents the suggested scope for the SA – a framework of sustainability issues and objectives which will form the focus of the appraisal of the emerging local plan and its reasonable alternatives.

1.3 The Scoping Report has been subject to consultation with the nationally designated authorities, adjoining councils, internal departments, other relevant bodies, Cabinet Members and Deputies and Local Plan Panel Members.

1.4 The Panel is asked to agree to the publication of the Scoping Report for the Swale Borough Local Plan SA, subject to any further changes it might agree.

2 Background

2.1 Sustainability Appraisal (SA) is a mechanism for considering and communicating the likely effects of a draft plan, and alternatives, in terms of sustainability issues, with a view to avoiding and mitigating adverse effects and maximising the positives. The SA must be undertaken in accordance with specific procedural requirements, as established by the Environmental Assessment of Plans and Programmes ('SEA') Regulations 2004. A sustainability appraisal of the proposals in all Local Plans is required by section 19 of the Planning and Compulsory Purchase Act 2004.

2.2 In January 2018 AECOM Ltd were appointed to undertake SA work for the Issues and Options and Preferred Option stages of the Swale Borough Local Plan.

2.3 Scoping is the first stage in a five-stage SA process, as follows:

1. Scoping presents a scope or 'framework' of sustainability issues and objectives that should be a focus of, and provide a methodological framework for, the appraisal of the emerging plan and reasonable alternatives.
2. Appraisal of reasonable spatial alternatives with a view to informing the preparation of the draft plan and subsequent assessment of the draft plan
3. Preparation of the SA Report with a view to informing consultation
4. Consultation of the SA Report
5. Publication of a statement at the time of the plan's adoption which 'tells the story' of plan making and the SA.

2.4 Scoping itself involves the following steps:

- Context review – a review of existing policy and issues/objectives established by Government, the Council and other key organisations;
- Baseline review – a review of the current situation locally and a consideration of how this might evolve in the absence of the plan;
- Key Issues summary – a summary of the key problems and opportunities identified in the context and baseline review;
- SA Framework – a refinement of the key issues to be carried forward into the next stages of the SA work.

2.5 The anticipated broad scope of the sustainability issues and objectives likely to be of greatest relevance to the emerging Swale Local Plan Review were presented under 12 themes or topics: air quality; biodiversity; climate change mitigation; communities; economy and employment; flood risk; heritage; housing; land; landscape; transport; water. Each chapter of the Scoping Report examines these themes in turn, looking at context, baseline and key issues and objectives.

2.6 At the end of each chapter the objectives for each topic are proposed. These objectives are also presented in Appendix A of the Scoping Report as the SA Framework itself (page 56 of Appendix I). These objectives are carried forward into the next stages of the SA. As an example, the SA objectives for Biodiversity are as follows:

- *Minimise, and avoid where possible, impacts to biodiversity, both within and beyond designated and non-designated sites of international, national or local significance.*
- *Achieve biodiversity net gain including through the long term enhancement and creation of well-connected, functional habitats.*

2.7 Now that the scoping stage has been undertaken, together with information gathered through the Looking Ahead Consultation and emerging evidence, Planning Policy Officers, with the assistance of AECOM, are in a position to begin the second stage of the SA as set out in 2.3 above. In due course, this is likely to involve Members agreeing to the reasonable spatial alternatives to be appraised.

3 Proposals

3.1 Appendix I is the Scoping Report for the Swale Borough Local Plan Sustainability Appraisal, July 2018. The Panel is asked to recommend to Cabinet that they agree the Scoping Report for the Swale Borough Local Plan Sustainability Appraisal as the scope and SA framework for the Sustainability Appraisal for the emerging Swale Borough Local Plan. Please note that the document may be subject to some minor updates following this report to Local Plan Panel.

4 Alternative Options

4.1 Panel Members may wish to comment further on this document. Comments will need to be presented back to AECOM for their response. If proposed changes are substantial this could delay progress with the Local Plan. As stated above, SA is a statutory requirement for all Local Plans so not agreeing to an SA Scoping Report is not a viable option.

5 Consultation Undertaken or Proposed

5.1 One key procedural requirement of the SEA Regulation is that there is consultation on ‘the scope and level of detail of the information’ to be included within the key output report with nationally designated authorities ie the Environment Agency (EA), Historic England (HE) and Natural England (NE). However, it was considered appropriate to consult more widely. The table below lists all the bodies consulted. Comments received were processed by AECOM and, where relevant, were incorporated in to the SA Scoping Report, July 2018 (Appendix I of this item).

Environment Agency	Comments received
Historic England	Comments received
Natural England	Comments received
Highways England	No comments received
RSPB	Comments received

Kent Wildlife Trust	No comments received
CPRE	No comments received
Swale Borough Council Economy and Communities	Comments received
Swale Borough Council Environmental Health	Comments received
Swale Borough Council Housing	Comments received
Swale Borough Council Climate Change	Comments received
Home Builders Federation	No comments received
Kent Developers Group	No comments received
Medway Council	Comments received
Ashford Borough Council	No comments received
Canterbury City Council	Comments received
Maidstone Borough Council	Comments received
SELEP	No comments received
KCC Environment	Comments received
KCC Flood Risk	Comments received
Southern Water	No comments received
South East Water	No comments received
Swale Borough Council Cabinet Members and Deputies	Comments received from Cllrs Lewin and Horton
Swale Borough Council Local Plan Panel Members	Comments received from Cllrs Lewin and Hunt

5.2 Copies of the consultation comments received can be found in the members' room.

5.3 It is not a requirement that the SA Scoping Report be formally published for public consultation, however, the document was published on the Swale Borough Council Emerging Local Plan website inviting anyone interested to comment on the draft document. No comments were received.

6 Implications

Issue	**Implications**
Corporate Plan	Supports the Council's corporate priorities for a borough and a community to be proud of.
Financial, Resource and Property	Within Local Plan budget.
Legal and Statutory	None anticipated at this time.

Crime and Disorder	None anticipated at this time.
Sustainability	The Local Plan process will be subject to Sustainability Appraisal.
Health and Wellbeing	None at this time.
Risk Management and Health and Safety	None at this time.
Equality and Diversity	The Local Plan process will be subject to a Community Impact Assessments at appropriate points.

7 Appendices

7.1 Appendix I - Scoping Report for the Swale Borough Local Plan Sustainability Appraisal, July 2018 (SA)

8 Background Papers

8.1 None

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AECOM Imagine it. Delivered.

Scoping Report for the Swale Borough Local Plan Sustainability Appraisal (SA)

July 2018

Quality information

Prepared by	Checked by	Approved by
Chris McNulty Consultant	Mark Fessey Associate	Dr Steve Smith Technical Director

Revision History

Revision	Revision date	Details	Authorized	Position
v1	May 2018	Draft for client comment	Mark Fessey	Associate
v2	May 2018	Consultation draft	Mark Fessey	Associate
V3	July 2018	Final	Mark Fessey	Associate

Prepared for:

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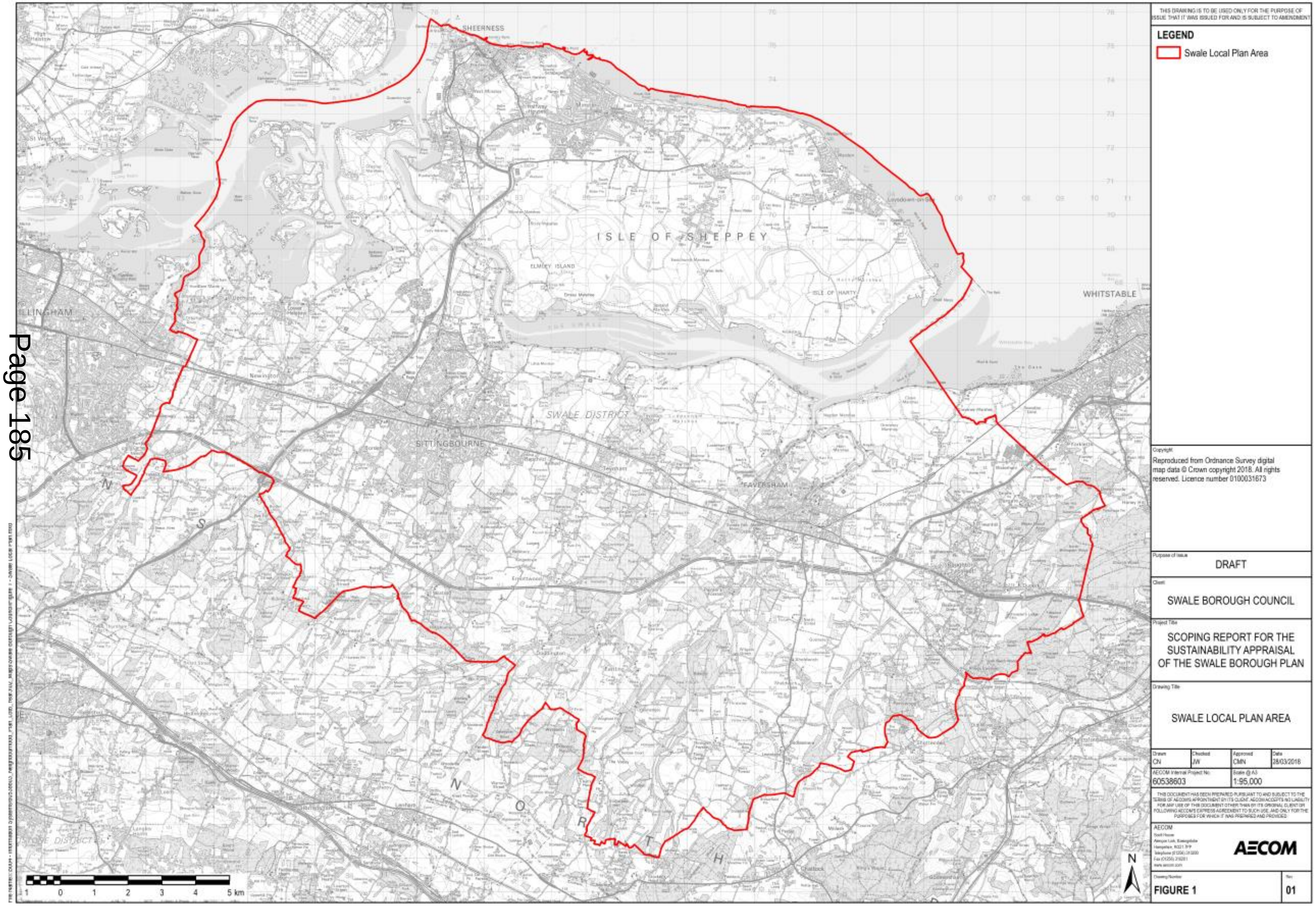
Figure 1.1 Swale Borough Local Plan Area



1. Introduction

Background

1.1 AECOM is commissioned by Swale Borough Council ('the Council') to lead on Sustainability Appraisal (SA) in support of the emerging Swale Local Plan Review. The plan is at a very early stage of development, with adoption anticipated in 2022.

1.2 Once adopted, the plan will establish a spatial strategy in relation to housing and employment growth up to 2038 (also dealing with other land uses, e.g. retail and community uses), allocate sites to deliver that strategy and establish policies to guide the planning application process. The Local Plan Review will replace the adopted Bearing Fruits 2031 Local Plan 2017 (the adopted Local Plan).

SA explained

1.3 SA is a mechanism for considering and communicating the likely effects of a draft plan, and alternatives, in terms of sustainability issues, with a view to avoiding and mitigating adverse effects and maximising the positives. The aim is to ensure that the plan contributes to the achievement of sustainable development.

1.4 SA must be undertaken in accordance with specific procedural requirements, as established by the Environmental Assessment of Plans and Programmes ('SEA') Regulations 2004. Two key procedural requirements of the SEA Regulations are that:

1. When deciding on 'the scope and level of detail of the information' which must be included within the key output report - namely the report published for consultation alongside the draft plan - there is a consultation with certain nationally designated authorities, namely the Environment Agency, Historic England and Natural England; and
2. A report (the 'SA Report') is published for consultation alongside the draft plan (i.e. the draft Local Plan Review) that 'identifies, describes and evaluates' the likely significant effects of implementing 'the plan [i.e. the Local Plan Review], and reasonable alternatives'.

This scoping report

1.5 This 'Scoping Report' is concerned with item 1 above. It presents a suggested scope for the SA so that the designated authorities can provide timely comment. This report is also published for consultation more widely.

1.6 This scoping report was prepared prior to the publication of the final revised NPPF in July 2018. The context of scoping is always 'live' and represents a snapshot in time in what is an ever-evolving context.

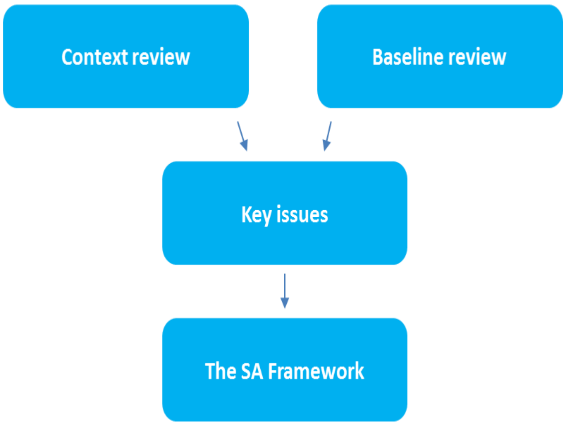
Approach to scoping

1.7 Scoping essentially involves identifying a 'framework' of sustainability issues and objectives that should be a focus of, and provide a methodological framework for, the appraisal of the emerging plan (and reasonable alternatives).

1.8 In order to facilitate the identification of sustainability issues/objectives, scoping firstly involves review of the 'context' and 'baseline'. Scoping therefore involves the following steps -

1. Context review - a review of existing policy and issues/objectives established by Government, the Council and other key organisations.
2. Baseline review - a review of current situation locally and a consideration of how this might evolve in the absence of the plan.
3. Key issues summary - a summary of the key (in the sense that the plan may have an effect) problems and opportunities identified through steps (1) and (2).
4. SA Framework development - a refinement of the key issues.

Figure 1.1: The scoping process



Structure of this report

1.9 Scoping steps 1 to 4 have been completed, and the outcomes are presented for consultation within this report.

1.10 Rather than presenting the outcomes of steps 1 to 4 sequentially within this report, the outcomes of steps 1 to 4 are presented under the following thematic headings in turn -

- Air quality
- Biodiversity
- Climate change mitigation
- Communities
- Economy and employment
- Flood risk
- Heritage
- Housing
- Land
- Landscape
- Transport
- Water

1.11 These themes reflect the anticipated broad scope of sustainability issues/objectives likely to be of greatest relevance to the emerging Swale Local Plan Review. It is intended that presenting the scoping information under these themes will help enable the reader to easily locate the information of greatest interest to them.

1.12 The discussion of scoping under each SA theme is presented in Sections 2 to 13. A final section then discusses 'next steps'.

2. Air quality

Context

National

2.1 Key messages from the National Planning Policy Framework (NPPF) include:

- Planning policies should sustain compliance with and contribute towards EU limit values or national objectives for pollutants, taking into account the presence of Air Quality Management Areas and the cumulative impacts on air quality from individual sites in local areas. Planning decisions should ensure that any new development in Air Quality Management Areas is consistent with the local air quality action plan.
- New and existing developments should be prevented from contributing to, being put at unacceptable risk from, or being adversely affected by unacceptable levels of air pollution .

2.2 The draft revised NPPF adds that "*opportunities to improve air quality or mitigate impacts should be identified such as through traffic and travel management, and green infrastructure provision and enhancement*" and encourages Local Authorities to do so at the plan making stage.[1]

2.3 The government published the 'UK plan for tackling roadside nitrogen dioxide concentrations' in July 2017. This is the air quality plan for bringing nitrogen dioxide - currently the only the statutory air quality limit the UK is failing to meet - within statutory limits in the shortest possible time. The plan identifies that "*the link between improving air quality and reducing carbon emissions is particularly important*" and that consequently the UK government is determined to be at the forefront of vehicle innovation by making motoring cleaner.

Regional

2.4 The Kent and Medway Air Quality Partnership is a multi-authority structure of eleven Kent authorities including nine lower tier authorities, Medway Unitary Authority and Kent County Council (KCC). The Network collects and monitors data on air quality from 18 monitoring sites across Kent. This data has been used to produce two technical Air Quality Planning Guidance documents to inform planning decisions. The aim is to improve regional air quality and speed up planning decision taking through the application of a consistent approach to air quality planning across the region. [2]

Local

2.5 Swale Borough Council is required to monitor air quality across the district under Section 82 of the Environment Act (1995), report regularly to Defra and take action where nationally set levels are likely to be exceeded. Monitoring is undertaken to assess levels of nitrogen dioxide (NO_2) and particulates.

2.6 Areas where exceedances are observed must be declared as Air Quality Management Areas (AQMAs) and local authorities are required to produce an Air Quality Action Plan (AQAP) to improve air quality in declared AQMAs. Work is ongoing to consolidate all five AQAPs in Swale into a single Strategic Air Quality Action Plan covering the period 2018-2022.

[1] MHCLG (2018) 'National Planning Policy Framework – draft text for consultation' [online], available from: https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/685289/Draft_revised_National_Planning_Policy_Framework.pdf
[2] Kent and Medway Air Quality Partnership [online], available from: http://www.kentair.org.uk [last accessed 19/03/18]

2.7 Swale Borough Council developed an Air Quality Planning Technical Guidance documents in December 2016 to help developers and applicants understand potential air quality impacts of proposed development and adopt appropriate mitigation.

Baseline

Current baseline

2.8 There are a number of air quality monitoring sites around the Borough. As of 2017 there are three sites with automatic analysers at Newington, Ospringe and St Pauls. Additionally there are passive diffusion tubes are at a further 57 locations around the Borough.

2.9 To meet its reporting obligations Swale Borough Council produces an annual Air Quality Annual Status Report (ASR). Headline findings from the 2017 Swale Borough Air Quality Annual Status Report include:[3]

- Five locations show frequent exceedances of the annual air quality objective level for nitrogen dioxide (NO_2) and are therefore subject to the below AQMAs.
- Particulate matter (PM10) concentrations are not exceeding air quality objectives but that monitoring of PM10 should continue.

2.10 The five AQMAs in the Borough are:

- AQMA 1 – Newington - encompasses those parts of London Road and the High Street (each sections of the A2) with a 30mph speed limit in the village of Newington.
- AQMA No 2 Ospringe extended – all of Ospringe Street in the village of Ospringe, a section of the A2 on the western edge of Faversham.
- AQMA No 3 – East Street, Sittingbourne – A stretch of the centrally located East Street where traffic queues on approach to the roundabout.
- AQMA No 4 – St Pauls Street, Sittingbourne – A stretch of St Pauls Street where traffic queues on approach to the roundabout.
- AQMA No 5 – Teynham – A strip of the A2 as it flows through Teynham village.

2.11 As all five AQMAs in the Borough are affected by similar issues and causes the Council is currently working on a combined AQAP to encompass all five individual AQAPs and cover the period to 2022. A common plan with measures to improve air pollution for all will be sought as an outcome of process.

Future baseline

2.12 New housing and employment provision in the Borough has the potential to negatively impact air quality through increasing traffic flows and the associated levels of pollutants such as nitrogen dioxide. Areas of particular sensitivity to increased traffic flows are likely to be the existing AQMAs along the A2/London Road corridor, particularly at pinch points in the major settlements and through areas of speed restrictions in the smaller villages.

2.13 This impact will be mitigated in part by the completion of the final phase of the Sittingbourne Northern Relief Road which the Council remain committed to delivering. Additional planned road infrastructure improvements are expected to contribute to a degree of congestion relief.

[3] Swale Borough Council 'Interim Air Quality Action Plan' [online] available from: http://services.swale.gov.uk/meetings/documents/s8359/Interim%20AQAP_Swale_2017_v10_final%20draft.pdf

Key issues and objectives

2.14 The following key issues emerge from the context and baseline review -

- There are five Air Quality Management Areas (AQMAs) in the Borough, all of which relate to exceedances in nitrogen dioxide (NO2)
- There are not currently any exceedances of Particulate matter (PM10) concentrations in the Borough; monitoring will continue to help ensure this position is maintained.

2.15 In light of the key issues discussed above it is proposed that the SA framework should include the following objectives:

- Support the achievement of air quality improvement objectives within the Borough's 5 designated AQMAs, and;
- Seek to minimise air pollution more generally, such as through supporting or enabling the use of low emission technologies and encouraging sustainable modes of transport such as walking and cycling.

3. Biodiversity

Context

National

3.1 A key message from the NPPF includes the commitment to halt the overall decline in biodiversity by minimising impacts and achieving net gains in biodiversity wherever possible. Promote the 'preservation, restoration and recreation of priority habitats, ecological networks' and the 'protection and recovery of priority species'. Plan for biodiversity at a landscape-scale across local authority boundaries.

3.2 The draft revised NPPF, though not yet adopted, places a greater emphasis on biodiversity in plan making including enhancing habitat networks, green infrastructure and natural capital at a larger than local scale.[4]

3.3 The statutory duty on public bodies, including plan making authorities, to conserve biodiversity was established by the Natural Environment and Rural Communities Act (2006).[5]

3.4 The government published "A Green Future: Our 25 Year Plan to Improve the Environment" in 2018 which sets out a 25 year strategy for helping the natural environment "*regain and retain good health*" and calls for "*an approach to agriculture, forestry, land use and fishing that puts environment first*".[6]

3.5 There are a range of other national level policy and guidance documents with a focus on protecting and enhancing biodiversity. In 2011 Defra published the Natural Environment White Paper (NEWP)[7] which outlined the government's vision for the natural environment for the subsequent 5 decades. The White Paper reiterated the importance that a healthy, functioning natural environment has for critical issues such as sustained economic growth, prospering communities and personal wellbeing.

3.6 Following the publication of the NEWP, Defra published Biodiversity 2020[8] in 2011, a national strategy for biodiversity policy to 2020. The key aims of the strategy are to halt loss of biodiversity-supporting habitats and to improve ecological networks and ecosystems and these are supported by a commitment to implementing a more integrated approach to conservation involving all tiers of government along with the voluntary, academic and business sectors and the public.

3.7 A degree of biodiversity loss can be an inevitable part of the development process in some instances though there is a growing awareness of re-provision and offsetting. The Biodiversity Offsetting Green Paper (September 2013)[9] sets out conservation activities designed to compensate for residual losses and establishes a framework for exploring offsetting biodiversity losses.

3.8 The NEWP announced that offsetting would be tested in pilot areas and six pilot areas were subsequently identified (Devon, Doncaster, Essex, Greater Norwich, Nottinghamshire and

[4] MHCLG (2018) 'NPPF Draft text for consultation' [online], available from: https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/685289/Draft_revised_National_Planning_Policy_Framework.pdf
[5] Natural Environment and Rural Communities Act 2006 [online] available at: http://www.legislation.gov.uk/ukpga/2006/16/contents Accessed March 2018
[6] Defra (2018) A Green Future: Our 25 Year Plan to Improve the Environment [online], available from: https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/693158/25-year-environment-plan.pdf
[7] Defra (2012) The Natural Choice: securing the value of nature (Natural Environment White Paper) [online] available at: http://www.official-documents.gov.uk/document/cm80/8082/8082.pdf Accessed March 2018
[8] Defra (2011) Biodiversity 2020: A strategy for England's wildlife and ecosystem services [online] available at: https://www.gov.uk/government/publications/biodiversity-2020-a-strategy-for-england-s-wildlife-and-ecosystem-services Accessed March 2018
[9] Defra (2013) Biodiversity Offsetting in England Green Paper [online] available at: https://www.gov.uk/government/consultations/biodiversity-offsetting-in-england Accessed March 2018

Coventry, Solihull and Warwickshire (CSWAPO). Results from the pilot areas were published in 2014 and conclude that "*whilst biodiversity offsetting has the potential to deliver improvements in biodiversity outcomes it will require additional resources and ecological expertise in local authorities to deliver it, and will increase costs overall for developers*". [10]

Regional

3.9 The Kent Biodiversity Action Plan establishes the key regional Biodiversity context for the Kent and Medway region including identifying 20 Biodiversity Action Plan habitat types across the region. Each habitat type has specific conservation aims and is associated with particular priority species. [11]

3.10 This is supported by the Kent Environment Strategy (KES) (2016), a document broader in scope than biodiversity alone but with a core message that Kent's natural environment is its primary infrastructure and that the value of biodiversity therefore extends to factors including the economic and social wellbeing of the region. The KES notes that Kent's 2010 biodiversity targets were not met and that biodiversity across the region has continued to decline since. To address this, the KES is intended to interlink with and inform plan making across the region.

3.11 The 'Living Landscape for the South East' guidance was produced by the South East Wildlife Trusts in 2006. Although it is now an older document the vision for an 'ecological network for the South East' remains relevant and important in the context of addressing biodiversity decline at a regional level.

3.12 A Strategic Access Management and Monitoring Strategy (SAMMS) is in place for the Thames, Medway and Swale Estuaries area and spans a number of authorities including Swale. This sets out a strategy to "*resolve disturbance issues to wintering birds*"[12].

Local

3.13 Key biodiversity objectives from the adopted Local Plan include:

- Ensuring development proposals include the enhancement of biodiversity as a primary objective. For example, this could take the form of increased delivery of green infrastructure within new developments to provide wildlife habitats and corridors.
- Protecting and enhancing Swale's natural assets by working to recognise and value ecosystems for their full range of benefits and services. In practice this could mean actions such as incorporating areas of woodland or grassland into new developments to capture the amenity value of these features as well as the biodiversity value.

3.14 The Swale Biodiversity Action Plan (2016) provides a local focus for the objectives of the broader Kent BAP with the specific intention of informing local actions which could have an impact on biodiversity. This could mean identifying opportunities for behaviour change which avoids harm to biodiversity or supporting existing efforts to mitigate the impact of development on biodiversity.

Baseline

Current baseline

3.15 Swale Borough supports a rich and diverse range of species and habitats, particularly in relation to its coastal areas and wetlands but also in some areas further inland. As a result there are a wide range of protective designations in the Borough across international, national

[10] Defra (2014) Evaluation of the Biodiversity Offsetting pilot phase – WC1051 [online], available from: http://randd.defra.gov.uk/Default.aspx?Menu=Menu&Module=More&Location=None&ProjectID=18229&FromSearch=Y&Publisher=1&SearchText=WC1051&SortString=ProjectCode&SortOrder=Asc&Paging=10#Description
[11] Kent Biodiversity Action Plan [online], available from: http://kentbap.org.uk/
[12] Footprint Ecology (2014), 'Thames, Medway and Swale Estuaries – Strategic Access Management and Monitoring Strategy' [online], available from: https://birdwise.org.uk/wp-content/uploads/2018/02/North-Kent-SAMMS-Report-2014.pdf

and local levels of designation. The high biodiversity value within these protected areas has sometimes been recognised at different levels simultaneously meaning a number of designations overlap.

Internationally designated sites

3.16 There are two Ramsar sites which are either partly or mostly within the Borough. Ramsar sites are wetland areas of international significance protected under the Ramsar Convention of 1976. The Medway Estuary & Marshes Ramsar site lies partly within the Borough's north west corner and it extends along much of the greater Thames Estuary area. The Swale Ramsar site is almost entirely within the Borough and is focussed on the southern and south eastern coasts of the Isle of Sheppey, The Swale body of water itself plus some of the waterways on the Isle of Sheppey.

3.17 There are two Special Protection Areas which are either partly or mostly within the Borough. These are the Medway Estuary and Marshes SPA and The Swale SPA both of which follow the same extent as their namesake Ramsar sites.

3.18 Additionally, there are two Special Areas of Conservation (SAC) within the Borough. The Queendown Warren SAC covers the same extent as the SSSI of the same name in the Borough's far south west corner. A small area of the Blean Complex SAC is located within the Borough's eastern boundary though the majority of this SAC is located within neighbouring Canterbury.

3.19 There are additional internationally designated sites outside the administrative boundaries of the Borough which could be impacted by development.

Nationally designated sites

3.20 There are also four separate Sites of Special Scientific Interest (SSSI) in the Borough. The Medway Estuary and Marshes site and The Swale are again subject to this additional designation. There are a further two SSSIs at Queendown Warren in the Borough's far south west corner and the Sheppey Cliffs and Foreshore SSSI along a stretch of the northern coast of the Isle of Sheppey.

3.21 The Swale Estuary Marine Conservation Zone and the Medway Estuary Marine Conservation Zone both extend across large parts of the Borough. Marine Conservation Zones were established in 2009 as an additional mechanism for protecting marine species and habitats of national importance.

3.22 There are three National Nature Reserves either entirely or partly within the Borough. Elmley NNR and The Swale NNR are both located on the southern side of the Isle of Sheppey facing onto the Swale and support large number of waterfowl, wildfowl and wading birds. Around half of the Blean Woods NNR, part of the largest ancient broadleaved woodland in southern Britain,[13] is located within the Borough.

3.23 There are four designated RSPB reserves within the Borough, two on the Isle of Sheppey (Harty Marshes and Great Bells Farm) and two which extend in the Borough from Canterbury (Blean Woods and Seasalter Levels).

3.24 There are additional nationally designated sites outside the administrative boundaries of the Borough which could be impacted by development.

Locally designated sites

3.25 There are three Local Nature Reserves (LNRs) in the Borough. LNRs recognise places of local wildlife or geological interest. The LNR at Queendown Warren overlaps with the SSSI and SAC designations on the site. The other two LNRs are Oare Marshes and South Bank of The Swale on the mainland coast north of Faversham. There are an additional 36 Local Wildlife Sites (LWS).

[13] https://www.gov.uk/government/publications/kents-national-nature-reserves/kents-national-nature-reserves#blean-woods

Ancient woodland

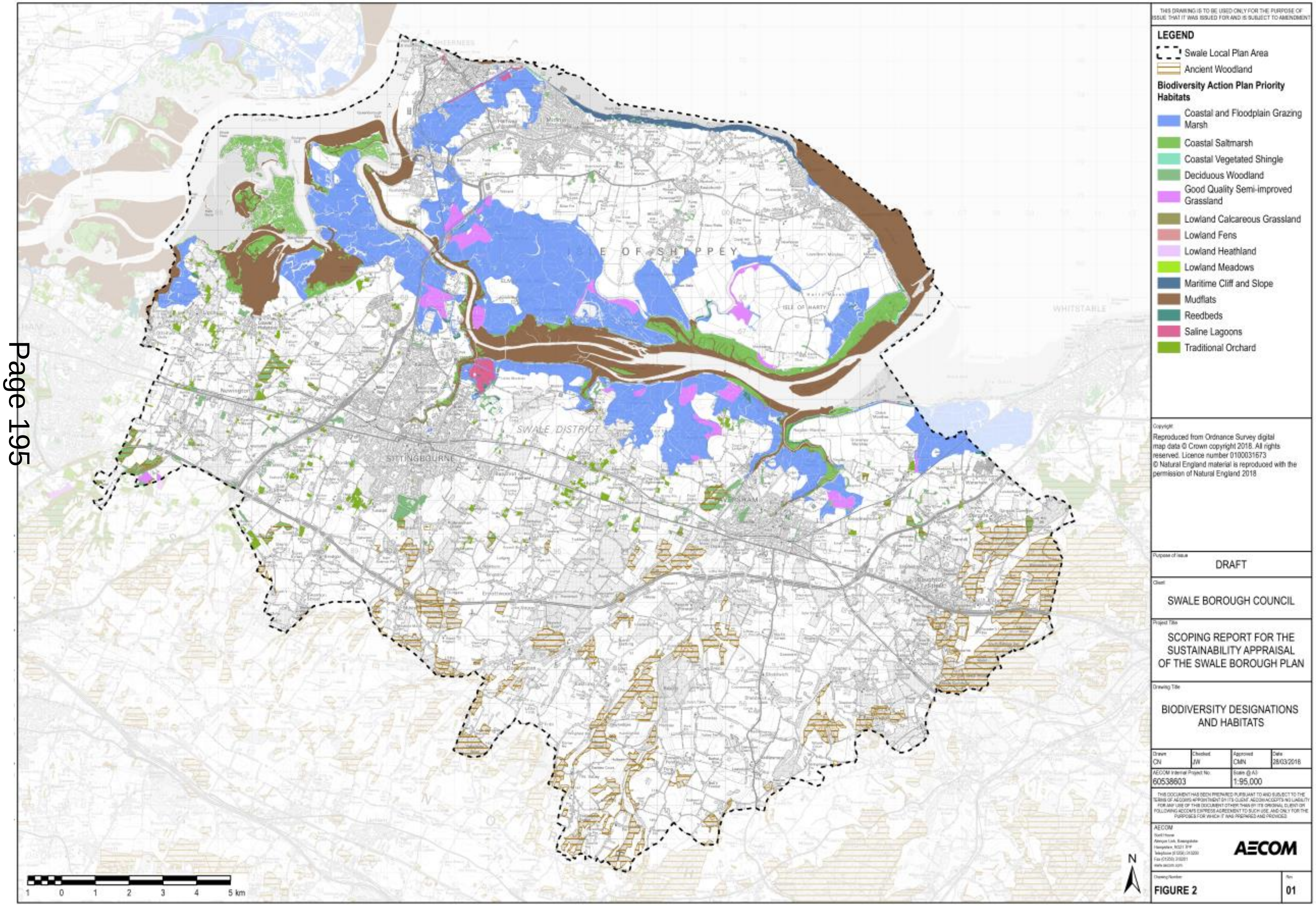
3.26 There is an extensive network of ancient woodland and ancient replanted woodland within the Borough though this is almost entirely located in the southern half of the Borough, South of the M2/A299. There are particularly dense clusters of ancient woodland east of Boughton Street and around the Borough's south eastern boundary.

Biodiversity Opportunity Areas

3.27 The Kent Biodiversity Action Plan identifies a number of Biodiversity Opportunity Areas (BOAs) across the County including a number which include parts of the Borough. BOAs are intended to help identify opportunities to facilitate biodiversity gains through "habitat enhancement, restoration and recreation."[14] There are three BOAs which include parts of the Borough, the North Kent Marshes BOA, the Blean BOA and the Mid Kent Downs, Woods and Scarp.

[14] Kent Biodiversity Action Plan [online], available from: http://www.kentbap.org.uk/kent-boas/ [last accessed 13/03/18].

Figure 3.1 Biodiversity designations and habitats



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Future baseline

3.28 Habitats and species have the potential to come under increasing pressure from the provision of new housing, employment and infrastructure in the Borough, including at designated sites. This could include increased disturbance (recreational, noise and light) and atmospheric pollution as well as the loss of habitats and fragmentation of biodiversity networks. The loss and fragmentation of habitats will be exacerbated by the effects of climate change, which has the potential to lead to changes in the distribution and abundance of species and changes to the composition and character of habitats. Coastal defences along much of the coastline prevent intertidal habitats from shifting landward in response to rising sea levels. As a result, these habitats are being gradually degraded and reduced in extent, with knock-on effects on the waterbirds and other species they support.

3.29 Benefits for biodiversity have the potential to arise from the increasing integration of biodiversity considerations within forward planning and efforts to improve green infrastructure networks across the Borough and sub-regionally. To maintain and improve the condition of biodiversity in the future it will be important to not only protect and enhance important habitats but to identify and enhance the connections between them.

Key issues and objectives

3.30 The following key issues emerge from the context and baseline review:

- There are two internationally designated sites (the Ramsar sites of Medway Estuary and Marshes and The Swale) within the Borough. The key issues of relevance for the Local Plan and SA include coastal squeeze through further development and increased levels of public access/disturbance.
- There are four European designated sites in the Borough, two Special Areas of Conservation and two Special Protection Areas.
- There are four SSSIs in the Borough.
- There are three LNR and 36 LWS within the Borough.
- There is an extensive network of ancient woodland within the Borough though its distribution is not even and most ancient woodland is concentrated south of the M2/A299 corridor.
- The Borough contains a wide variety and large number of BAP priority habitats including many which reflect its coastal location such as ‘coastal and floodplain grazing marsh’; ‘saline lagoons’; ‘mudflats’; ‘coastal saltmarsh’; ‘reedbeds’; ‘maritime cliff and slope’; ‘coastal vegetated shingle’ along with land-based habitats including ‘good quality semi-improved grassland’; ‘deciduous woodland’; ‘wood pasture and parkland’; ‘traditional orchard’ and ‘lowland calcareous grassland’.

3.31 In light of the key issues discussed above it is proposed that the SA framework should include the following objectives:

- Minimise, and avoid where possible, impacts to biodiversity, both within and beyond designated and non-designated sites of international, national or local significance.
- Achieve biodiversity net gain including through the long term enhancement and creation of well-connected, functional habitats.

4. Climate change mitigation

Context

National

4.1 Climate change presents challenges at all levels from the global scale to the local. This is reflected in the range of policy responses across the different tiers of government in the UK. The key messages from the National Planning Policy Framework include:

- Supporting the transition to a low carbon future in a changing climate as a 'core planning principle'. To support the move to a low carbon future, local planning authorities should: plan for new development in locations and ways which reduce greenhouse gas emissions; actively support energy efficiency improvements to existing buildings; and when setting any local requirement for a building's sustainability, do so in a way consistent with the Government's zero carbon buildings policy and adopt nationally described standards.
- Planning for new development in locations and ways which reduce greenhouse gas emissions; actively support energy efficiency improvements to existing buildings; and when setting any local requirement for a building's sustainability, do so in a way consistent with the Government's zero carbon buildings policy and adopt nationally described standards.

4.2 The draft revised NPPF says that "plans should take a proactive approach to mitigating and adapting to climate change, taking into account the long-term implications for flood risk, coastal change, water supply, biodiversity, and landscapes".

4.3 The UK Climate Change Risk Assessment is published on a 5-yearly cycle in accordance with the requirements of the Climate Change Act 2008. It required the Government to compile an assessment of the risks for the UK arising from climate change, and then to develop an adaptation programme to address those risks and deliver resilience to climate change on the ground. For both the 2012 and the 2017 UK Climate Change Risk Assessment, the Adaptation Sub-Committee commissioned an evidence report [15] containing six priority risk areas requiring additional action in the next five years:

- Flooding and coastal change risks to communities, businesses and infrastructure;
- Risks to health, well-being and productivity from high temperatures;
- Risk of shortages in the public water supply, and for agriculture, energy generation and industry;
- Risks to natural capital, including terrestrial, coastal, marine and freshwater ecosystems, soils and biodiversity;
- Risks to domestic and international food production and trade; and
- New and emerging pests and diseases, and invasive non-native species, affecting people, plants and animals

4.4 The UK Climate Change Act[16] was passed in 2008 and established a framework to develop an economically credible emissions reduction path. It also highlighted the role it would take in contributing to collective action to tackle climate change under the Kyoto Protocol, and more recently as part of the UN-led Paris Agreement.

[15] DEFRA (2017): 'UK Climate Change Risk Assessment Report January 2017', [online] available to download from: <https://www.gov.uk/government/publications/uk-climate-change-risk-assessment-2017> [last accessed 13/02/18]
[16] HM Government (2008): 'Climate Change Act 2008', [online] accessible via <http://www.legislation.gov.uk/ukpga/2008/27/contents> [last accessed 13/02/18]

4.5 The Committee of Climate Change published a 2012 report entitled 'How Local Authorities can Reduce Emissions and Manage Climate Change Risk' [17] which emphasises the crucial role councils have in helping the UK meet its carbon targets and preparing for the impacts of climate change. It outlines specific opportunities for reducing emissions and highlights good practice examples from a number of local authorities.

Regional

4.6 Swale Borough has an extensive coastline and this means that Swale and the wider north Kent region it is within could be particularly vulnerable to the effects of climate change. Correspondingly there are a number of regional level policy documents which seek to acknowledge and address this threat

4.7 The key documents include the Medway Estuary and Swale Shoreline Management Plan (SMP)[18] and the Isle of Grain to South Foreland SMP[19] (both adopted in 2010) which provide a large scale assessment of risks to the Medway Estuary and Swale coast and promote policies to manage the coastline sustainably until the 22nd century. The objectives include defining, in general terms, where flooding and erosion as a result of climate change present risks to people and assets in the Plan area.

4.8 Taking these two SMPs adopted in 2010 as a starting point, the Medway Estuary and Swale Flood and Coastal Risk Management Strategy, due for publication in Autumn 2018, will "*determine the best economic, environmental and technically appropriate approach*" to managing flood risk and will "*identify suitable schemes to deliver the policies set out within the Medway Estuary and Swale SMP*"[20].

4.9 At an administrative regional level the Kent Environment Strategy (2016) [21] identifies that Kent's natural environment has an important role to play in reducing risks from climate change and that key impacts from climate change on the county are likely to include increased water stress and increased vulnerability to climate-related weather events such as coastal flooding.

Local

4.10 The adopted Local Plan acknowledges the impact of climate change on a range of local factors. The adopted Local Plan seeks to mitigate likely effects of climate change through implementing sustainable design and construction techniques, through effective coastal management and promoting renewable and low carbon energy. The importance of climate change adaptation and mitigation in Swale is reflected in the adopted Local Plan.

4.11 The adopted Local Plan's Core Objectives which features "Adapt[ing] to climate change with innovation, reduced use of resources, managed risk to our communities and opportunities for biodiversity to thrive" as its first core objective. Specific strategies proposed by the adopted Local Plan include the implementing sustainable drainage systems (SuDS) as "the norm" in new development.[22]

4.12 The adopted Local Plan identifies particular threats from climate change to coastal erosion, food production, biodiversity, agriculture and transport. Responses to the threat are summarised in Policy ST1 which includes the following passage:

[17] CCC (2012), 'How local authorities can reduce emissions and manage climate risks', [online]; available from: https://www.theccc.org.uk/publication/how-local-authorities-can-reduce-emissions-and-manage-climate-risks/
[18] Environment Agency (2010) 'SMP 9 Medway Estuary and Swale' [online], available from: http://www.se-coastalgroup.org.uk/medway-estuary-and-swale-2008/ [last accessed 20/03/18]
[19] Environment Agency (2010) 'SMP 10 Isle of Grain to South Foreland' [online], available from: http://www.se-coastalgroup.org.uk/iogtosf2008/ [last accessed 30/05/18].
[20] Environment Agency (2018) 'Medway Estuary and Swale flood and coastal risk management strategy – public consultation' [online] available from: https://www.gov.uk/government/publications/medway-estuary-and-swale-flood-and-coastal-risk-management-strategy/medway-estuary-and-swale-flood-and-coastal-risk-management-strategy [accessed 24/05/18].
[21] Kent County Council (2016) 'Kent Environment Strategy' [online] available from: https://www.kent.gov.uk/about-the-council/strategies-and-policies/environment-waste-and-planning-policies/environmental-policies/climate-change/kent-environment-strategy [last accessed 20/03/18].
[22] Swale Borough Council, 'Bearing Fruits 2031: The Swale Borough Local Plan' [online], available from: https://www.swale.gov.uk/local-plan-for-swale/ (paragraph 4.1.49)

"*Meet the challenge of climate change, flooding and coastal change through:*

a) Promotion of sustainable design and construction, the expansion of renewable energy, the efficient use of natural resources and the management of emissions;

b) The management and expansion of green infrastructure; and

c) *Applying planning policies to manage flood risk and coastal change*."

Baseline

Current baseline

4.13 Reducing greenhouse gas (GhG) emissions is generally acknowledged as a key element of climate change mitigation and CO2 emissions are particularly associated with a changing climate. In this context emissions are monitored and recorded at Local Authority level to enable high-emitting areas to identify and mitigate sources of emissions. These are presented in Table 4.1 below:

Table 4.1 Local Authority CO2 emissions estimates within the scope of influence of Local Authorities 2005-2015 (kt CO2) 2005-2015[23]

	Industrial and commercial (t CO2)	Domestic (t CO2)	Transport (t CO2)	Total (t CO2)
Swale Borough				
2005	4.8	2.4	1.5	8.6
2006	5.7	2.3	1.5	9.6
2007	6.0	2.3	1.5	9.7
2008	5.2	2.3	1.4	8.9
2009	4.6	2.0	1.4	7.9
2010	7.6	2.2	1.3	11.1
2011	6.3	1.9	1.3	9.5
2012	3.1	2.0	1.3	6.3
2013	2.9	1.9	1.3	6.1
2014	2.3	1.6	1.3	5.2
2015	2.3	1.5	1.3	5.2
South East				
2005	2.6	2.5	1.9	6.9
2006	2.5	2.5	1.8	6.9
2007	2.4	2.4	1.8	6.7

[23] Department of Business, Energy and Industrial Strategy (2017) UK local authority and regional carbon dioxide emissions national statistics: 2005-2015: subset dataset Local Authority CO2 emissions estimates within the scope of influence of Local Authorities 2005-2015 (kt CO2) (available at: <https://www.gov.uk/government/statistics/uk-local-authority-and-regional-carbon-dioxide-emissions-national-statistics-2005-2015> last accessed 21/03/18]

	Industrial and commercial (t CO_2)	Domestic (t CO_2)	Transport (t CO_2)	Total (t CO_2)
2008	2.4	2.4	1.7	6.5
2009	2.1	2.2	1.6	5.9
2010	2.3	2.3	1.6	6.2
2011	2.0	2.0	1.6	5.6
2012	2.1	2.2	1.5	5.8
2013	2.0	2.1	1.5	5.5
2014	1.6	1.7	1.5	4.9
2015	1.5	1.7	1.5	4.7
England				
2005	3.0	2.5	1.7	7.2
2006	3.0	2.5	1.7	7.1
2007	2.8	2.4	1.7	6.9
2008	2.7	2.4	1.6	6.7
2009	2.4	2.1	1.5	6.1
2010	2.5	2.3	1.5	6.3
2011	2.2	2.0	1.4	5.7
2012	2.4	2.1	1.4	5.9
2013	2.3	2.0	1.4	5.7
2014	1.9	1.7	1.4	5.0
2015	1.7	1.6	1.4	4.8

4.14 Table 4.1 illustrates that Swale's CO_2 emissions have stabilised and decreased in recent years though they remain higher than emissions levels for the South East region and England as a whole. This reflects the high level of industrial activity in the Borough including major port facilities at Sheerness and the extensive industrial and light industrial uses at the Eurolink industrial area of Sittingbourne. Despite the high (though decreasing) levels of industrial emissions domestic contributions to CO_2 emissions are actually lower in Swale than at regional and national levels suggesting that whilst the Borough's economy is currently underpinned by industrial activity its residents are able to practice lower than average emission-generating behaviours.

Future baseline

4.15 Climate change has the potential to increase the occurrence of extreme weather events in the Borough, with increases in mean summer and winter temperatures, increases in mean precipitation in winter and decreases in mean precipitation in summer. The UK Climate

Projections (UKCP09) team have estimated that under a medium emissions scenario, the central estimate of change in winter mean precipitation is an increase of 16%, while there is estimated to be an average drop in summer precipitation of 19%. This is likely to increase the risk of flooding in winter months and increase water shortages during summer months with an increased need for resilience and adaptation.

4.16 In terms of climate change mitigation, per capita emissions are likely to continue to decrease as energy efficiency measures, renewable energy production and new technologies become more widely adopted. This relates to issues such as transport, as increased take up of more energy efficient vehicles and electric vehicles takes place. However, increases in the built footprint of the Borough may lead to increases in overall emissions if efficiency measures do not keep pace and future expansion phases of Eurolink could have potential to increase the number of sources of emissions even as efficiencies reduce their individual impact.

Key issues and objectives

- Overall CO2 emissions are now following a downward trend after several years of volatility but this is from an elevated baseline and overall emissions remain high in comparison to regional and national averages. This reflects the industrial nature of much business activity in Swale.
- Whilst industrial emissions in particular are high, domestic and transport emissions for the Borough are at or below regional and national averages. This is a positive position and it will be important for new development to integrate with sustainable transport networks and incorporate design and construction techniques which help maintain and further improve current outcomes.
- Swale has a long coastline which could potentially make it increasingly vulnerable to future climate-related weather events and coastal erosion.

4.17 In light of the key issues discussed above it is proposed that the SA framework should include the following objectives:

- Minimise per capita greenhouse gas emissions from transport, industry and the built environment.
- Deliver Sustainable Drainage Systems and other measure with a view to future proofing and building climate change resilience
- Deliver high standards of energy efficiency and water efficiency in new development.

5. Communities

Context

National

5.1 Key messages from the National Planning Policy Framework (NPPF) in relation to communities include:

- To 'boost significantly the supply of housing', local planning authorities should meet the 'full, objectively assessed need for market and affordable housing' in their area. They should prepare a Strategic Housing Market Assessment to assess their full housing needs, working with neighbouring authorities where housing market areas cross administrative boundaries. The Strategic Housing Market Assessment should identify the scale and mix of housing and the range of tenures that the local population is likely to need over the plan period.
- With a view to creating 'sustainable, inclusive and mixed communities' authorities should ensure provision of affordable housing onsite or externally where robustly justified.
- The planning system can play an important role in facilitating social interaction and creating healthy, inclusive communities.
- Promote the retention and development of local services and community facilities such as local shops, meeting places, sports venues, cultural buildings, public houses and places of worship.
- Ensure that developments create safe and accessible environments where crime and disorder, and the fear of crime, do not undermine quality of life or community cohesion. Places should contain clear and legible pedestrian routes, and high quality public spaces, which encourage the active and continual use of public areas.
- Ensuring that there is a 'sufficient choice of school places' is of 'great importance' and there is a need to take a 'proactive, positive and collaborative approach' to bringing forward 'development that will widen choice in education'.

5.2 Key messages from the draft revised NPPF include new guidance that planning policies should:

- Take into account and support the delivery of local strategies to improve health, social and cultural wellbeing for all sections of the community.
- Consider the social and economic benefits of estate regeneration.
- Enable and support healthy lifestyles through provision of facilities such as accessible green infrastructure, sports facilities and layouts that encourage walking and cycling.

Local

5.3 The adopted Local Plan aims to deliver healthy, sustainable communities in Swale but identifies that this will be a challenge in some instances. Significant social, economic and environmental disparities are identified as particular challenges, especially concentrations of deprivation on the Isle of Sheppey and in Sittingbourne. To address this, the adopted Local Plan aims to improve connectivity of most isolated communities and harness growth to provide greener and more prosperous communities across the Borough.

Baseline

Current baseline

5.4 Census data provides an important statistical baseline for our understanding of a population. The 2001 and 2011 census data for Swale of particular relevance to population and communities is presented below:

Table 5.1 Population growth 2001-2011[24]

Date	Swale	South East	England
2001	122,801	8,000,645	49,138,831
2011	135,835	8,634,750	53,012,456
Population Change 2001-2011	10.6%	7.9%	7.9%

5.5 At the 2011 census the population in Swale Borough was 135,835, an increase of 13,034 people or 10.6% since 2001 (see Table 5.1) or an annual growth rate of 1.06% per annum. This rate of growth was higher than that for the South East region or for England as a whole.

Table 5.2 Age structure (2001)

Age Group	Swale	South East	England
0-15	21.6%	19.9%	20.1%
16-24	10.2%	10.6%	10.9%
25-44	28.2%	28.9%	29.3%
45-59	20%	19.5%	18.9%
60+	20%	21.1%	20.8%
Total population	122,801	8,000,645	49,138,831

Table 5.3 Age structure (2011)

Age Group	Swale	South East	England
0-15	20.1%	19%	18.9%
16-24	10.8%	11.2%	11.9%
25-44	25.4%	26.5%	27.5%
45-59	20.2%	19.9%	19.4%
60+	23.5%	23.4%	22.3%
Total population	135,835	8,634,750	53,012,456

[24] Ibid.

Table 5.4 Age structure (mid-2016 estimate)

Age Group	Swale	South East	England
0-15	20.0%	19.1%	18.0%
16-24	10.4%	10.7%	12.2%
25-44	24.0%	25.1%	26.5%
45-59	21.0%	20.8%	20.1%
60+	24.6%	24.3%	23.2%
Total population	145,042	9,026,297	55,268,100

5.6 Tables 5.2, 5.3 and 5.4 illustrates that the age structure of the Borough is broadly aligned with that at regional and national levels although there is a slightly higher proportion of under-15s and over 60s and a slightly lower proportion of 16-44 year olds than the South East and England as a whole.

5.7 As per Table 5.5 below, the 2016 mid-year population estimate released by the ONS indicates that this rate of growth is being sustained. The mid-2016 population of Swale was estimated at 145,042, a growth of 6.8% over the 5 years since the 2011 census, equivalent to an annual growth rate of 1.35%.[25]

Table 5.5 Swale population change 2011 - 2016

Age group	2011 population (census data)	2016 population (mid-year estimate)	% change 2011-2016
0-15	27,296	28,955	+6.1%
16-24	14,703	15,129	+1.6%
25-44	34,522	34,831	+1.1%
45-59	27,467	30,445	+10.9%
60+	31,847	35,682	+14%
Total Population	135,835	145,042	+6.8%

Household Deprivation

5.8 Census statistics measure deprivation across four 'dimensions' of deprivation, summarized below:

- Employment: Any person in the household (not a full-time student) that is either unemployed or long-term sick.
- Education: No person in the household has at least a level 2 qualification and no person aged 16-18 is a full-time student.
- Health and disability: Any person in the household that has generally 'bad' or 'very bad' health, or has a long term health problem.
- Housing: The household accommodation is either overcrowded (with an occupancy rating of -1 or less), in a shared dwelling or has no central heating.

Table 5.6 Relative household deprivation dimensions

	Swale	South East	England
Household not	40.1%	47.7%	42.5%

[25] ONS, 'Population Estimate for UK, England and Wale, Scotland and Northern Ireland: mid-2012 to mid-2016' [online] available from: https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationestimates/datasets/populationestimatesforukenglandandwalesscotlandandnorthernireland

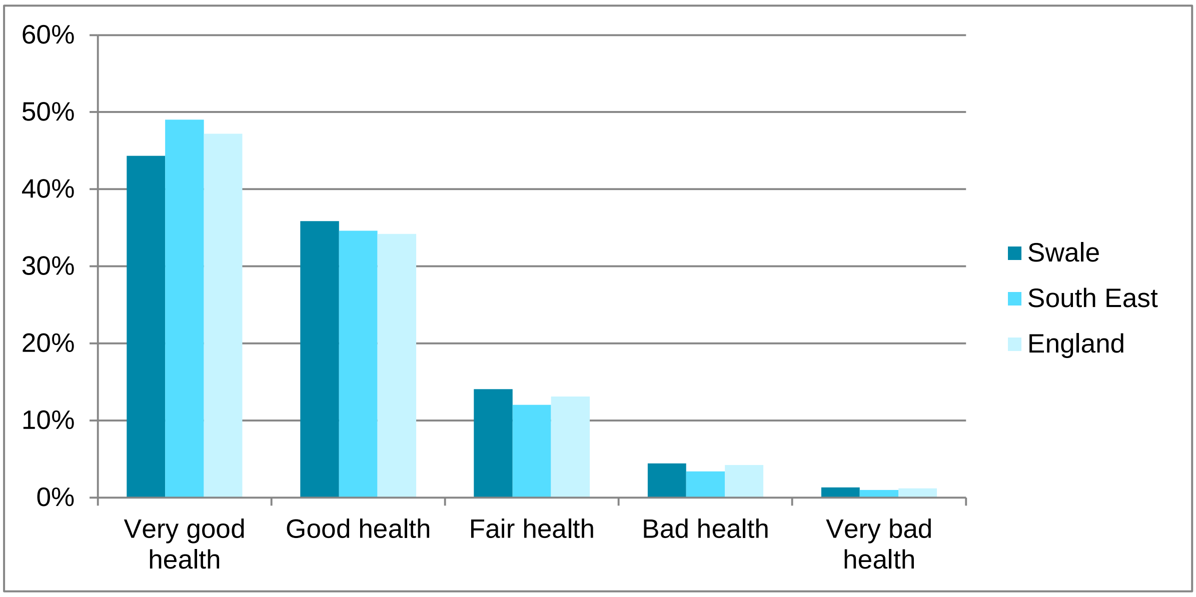
	Swale	South East	England
deprived			
Deprived in 1 dimension	33.1%	32.2%	32.7%
Deprived in 2 dimensions	20.6%	16%	19.1%
Deprived in 3 dimensions	5.6%	3.7%	5.1%
Deprived in 4 dimensions	0.6%	0.4%	0.5%

5.9 Table 5.3 illustrates that when compared with the South East and England as a whole Swale has slightly higher proportions of deprivation across all dimensions and a lower proportion of households which are not deprived. However, these headline figures conceal the fact that there are considerable contrasts within the Borough and the adopted 2017 Local Plan notes that whilst deprivation is particularly acute in areas of Sheppey, such as Queenborough, there are also areas of affluence and very low deprivation across the rural areas and within Faversham. This highlights the diversity and complexity of needs within the Borough.

Health and wellbeing

5.10 Figure 5.1 shows that on balance general health outcomes in Swale are slightly below the level of those at regional and national levels. Although slightly more people in the borough are in 'Good' health, this is offset by a fewer people in 'Very Good' health compared with the South East and England as a whole. Correspondingly, there are slightly more people in bad or very bad health in Swale (5.8%) than in the South East region (4.4%) though this is broadly in line with the national average (5.4%).

Figure 5.1 General Health[26]



[26] ONS, Census 2011: 'General Health' (Table QS302EW)

Table 5.7 Long term health category[27]

	Swale	South East	England
Day-to-day activities limited a lot	5.5%	6.9%	8.3%
Day-to-day activities limited a little	7.3%	8.8%	9.3%
Day-to-day activities not limited	87.2%	84.3%	82.4%

5.11 Table 5.7 shows that in terms of long term health and disability residents in the Borough have generally better outcomes than at regional and national levels. In the 2011 census only 5.5% of Swale residents reported long term health significant limits their day-to-day activities compared with 6.9% in the South East region and 8.3% in England as a whole.

5.12 Allocations in the adopted Local Plan include a number of community benefits. These include financial contributions for Sheppey Community Hospital from the allocation at Thistle Hill in Minster; 15ha of open space and new pedestrian and cycle links at Stones Farm in Sittingbourne; and the creation of a new country park and community facilities associated with the Iwade expansion.

Future baseline

5.13 There could be potential for the annual rate of population growth of 1%+ to continue into the short and medium term as the mid-2016 population estimate even indicates a slight increase in the population growth rate from the 2011 census. This will have implications for sustainability in the Borough as additional residents will create additional pressure on community infrastructure and services.

5.14 However, this growth could also bring opportunities to lever in investment which enhances existing infrastructure and services, addresses deprivation associated with isolated communities, enhances internal linkages and those with surrounding areas and encourages opportunities for healthy lifestyle choices to be designed-in to new development.

5.15 The adopted Local Plan includes positive and ambitious regeneration strategies to transform four areas within the borough. Whilst the objectives of this are wide ranging there is likely to be a significant social and community aspect to the improvements, particularly in relation to improved public realm and improved infrastructure and facilities. The four areas are central Sittingbourne, Queenborough and Rushenden, the Port of Sheerness and Kent Science Park. Regeneration will achieve community benefits such as an "*enhanced civic quarter*" and "*further education facilities*" (Sittingbourne); improving "*housing choice to restore the local housing market area*" (Queenborough and Rushenden) and enhancing "*the significance or heritage assets*" (Port of Sheerness).

Key issues and objectives

5.16 The following key issues emerge from the context and baseline review:

- Overall levels of household deprivation are broadly aligned with national averages though the Borough contains pockets of higher deprivation, particularly on the Isle of Sheppey, as well as areas of affluence and low deprivation.
- Increasing pressure on community infrastructure is likely from a growing population though this could also bring opportunities for new development to enhance access to community infrastructure and services.
- A proactive approach to regeneration is being undertaken in the Borough which is anticipated to deliver a range of social and community benefits.

[27] ONS, Census 2011: 'Long Term Health Problem or Disability' (Table QS303EW)

5.17 In light of these key issues it is proposed that the SA framework should include the following objectives:

- Support good access to existing and planned community infrastructure for new and existing residents.
- Promote and support healthy communities, including through increasing access to green infrastructure and open space.

6. Economy and employment

Context

National

6.1 Good planning has a key role to play in ensuring economic prosperity and meeting the demand for jobs and resources. Consequently the National Planning Policy Framework (NPPF) features a number of messages on economy and employment, including:

- The planning system can make a contribution to building a strong, responsive economy by 'ensuring that sufficient land of the right type is available in the right places and at the right time to support growth and innovation; and by identifying and coordinating development requirements, including the provision of infrastructure'.
- Capitalise on 'inherent strengths', and to meet the 'twin challenges of global competition and of a low carbon future'.
- Support new and emerging business sectors, including positively planning for 'clusters or networks of knowledge driven, creative or high technology industries'.
- Support competitive town centre environments.
- Edge of town developments should only be considered where they have good access. This should be followed with an impact assessment to ensure the town centre remains viable in the long term.

6.2 The NPPF is clear that Local Plans have an important role to play in economic prosperity at a Local Authority level. This includes:

- Setting out a clear economic vision and strategy which positively and proactively encourages sustainable economic growth;
- Supporting existing business sectors and planning for new or emerging sectors;
- Identifying priority areas for economic regeneration;
- Facilitating flexible working practices
- Avoiding protecting land for employment where there is no reasonable prospect of a site being used for the allocated employment use.

6.3 Key messages from the draft revised NPPF include new guidance that planning policies should :

- 'seek to address potential barriers to investment, such as inadequate infrastructure, services or housing, or a poor environment'; and
- 'be flexible enough to accommodate needs not anticipated in the plan' in order to 'enable a rapid response to changes in economic circumstances'.

6.4 The Local Growth White Paper (2010)[28] notes that government interventions should support investment that will have a long term impact on growth, working with markets rather than seeking to create artificial and unsustainable growth. The White Paper identifies that economic policy should be judged on the degree to which it delivers strong, sustainable and balanced growth of income and employment over the long-term. More specifically, growth should be: broad-based industrially and geographically, ensuring everyone has access to the opportunities that growth brings (including future generations), whilst also focused on businesses that compete with the best internationally.

[28] Department for Business, Innovation and Skills, 2010, Local Growth: Realising Every Place's Potential [online] available at: https://www.gov.uk/government/publications/local-growth-realising-every-places-potential-hc-7961 Accessed Aug 2017

Regional

6.5 Kent and Medway Growth Deal (2014) (Kent County Council) sets out an investment and growth strategy for the region's economy; identifies key employment sectors in Swale including life sciences, land-based (agriculture/horticulture) and manufacturing.

6.6 The South East LEP Strategic Economic Plan (2014) identifies opportunities and priorities to support local economic and population growth in the South East region through private and public funding.

Local

6.7 A key goal of the adopted Local Plan is to ensure that a steady supply of employment land comes forward over the plan to improve both quantity and quality of employment offer in the Borough. The adopted Local Plan aims to provide opportunities for the 56% of residents who travel elsewhere for work to find employment within the Borough and anticipates that an improving school performance will boost the skills of the local workforce.

6.8 Significant 'Regeneration Areas' are identified in the adopted Local Plan at Central Sittingbourne, Queenborough and Rushenden, The Port of Sheerness and Kent Science Park which offer opportunities for growth and beautification of existing retail and employment areas.

6.9 The adopted Local Plan identifies the Borough's two strategic employment locations as the Port of Sheerness and Kent Science Park and targets further growth at both locations over the plan period to support a growing population and to continue to position the Borough as an attractive place to work.

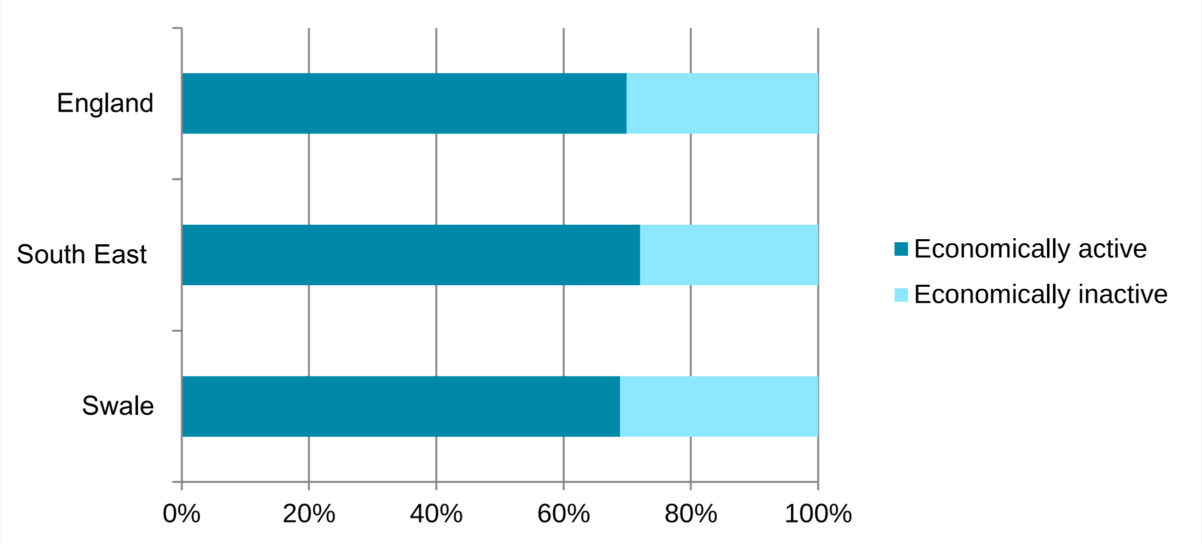
6.10 The Swale Visitor Economy Framework 2018-2023 identifies the significant economic potential of tourism in Swale and sets out an objective to increase tourism's value to the Borough from £193m of visitor spending to £218m by 2023.

Baseline

Current baseline

6.11 Swale's location within an economically significant region provides a key driver for growth and this supports a range of sectors which underpin the Borough's economy. The A249 corridor running between Sittingbourne and Sheerness on the Isle of Sheppey is home to significant manufacturing, defence and automotive industry employers as well as opportunities related to the Kent Centre for Offshore Renewable Engineering (CORE). The Kent Science Park near Sittingbourne is a centre for science and research-based jobs. The Eurolink Industrial Park has been through several phases of expansion and supports significant distribution, light industrial and warehousing activities. The productive soils of the Borough's traditional fruit belt continue to represent an important part of the local economy. The public sector, in particular the major prisons on the Isle of Sheppey, is another significant employer.

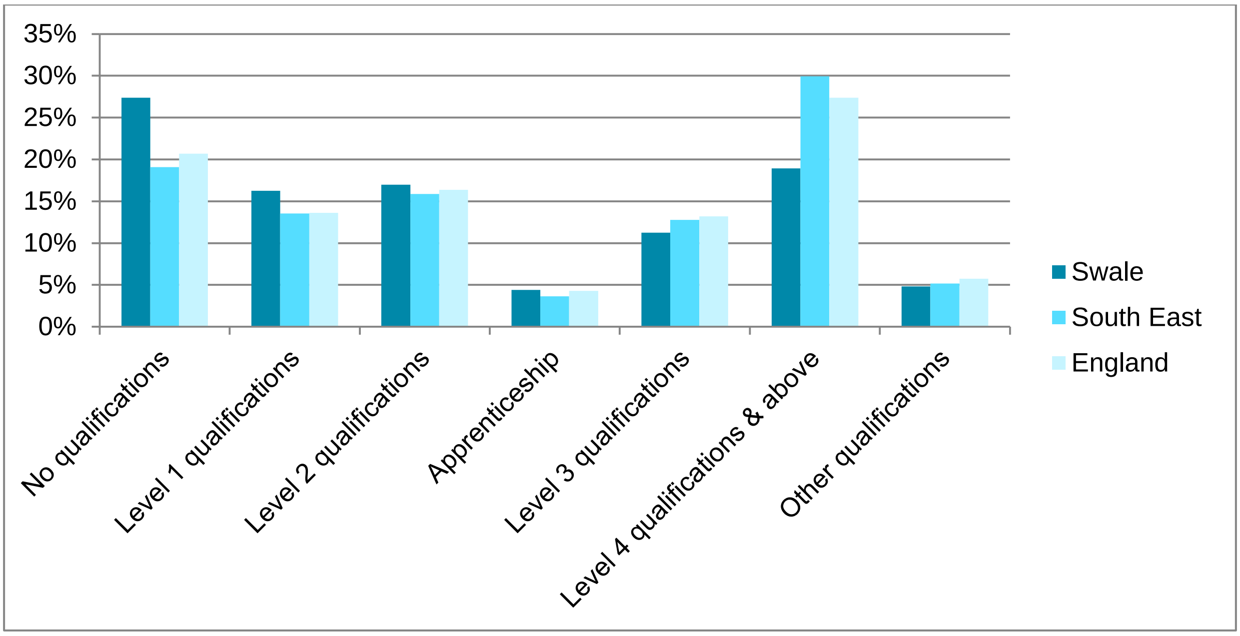
Figure 6.1 Economic activity rates



6.12 Figure 6.1 illustrates that at 68.9% the rate of economic activity of employment-age residents in Swale is below the average for the South East (72.1%) but aligned with the national average (69.9%).

6.13 The average unemployment rate in the Borough is also higher than regional and national unemployment averages. According to the 2011 census data unemployment in the Borough was 5.4%, compared to 4.0% in the East and 4.4% for England.

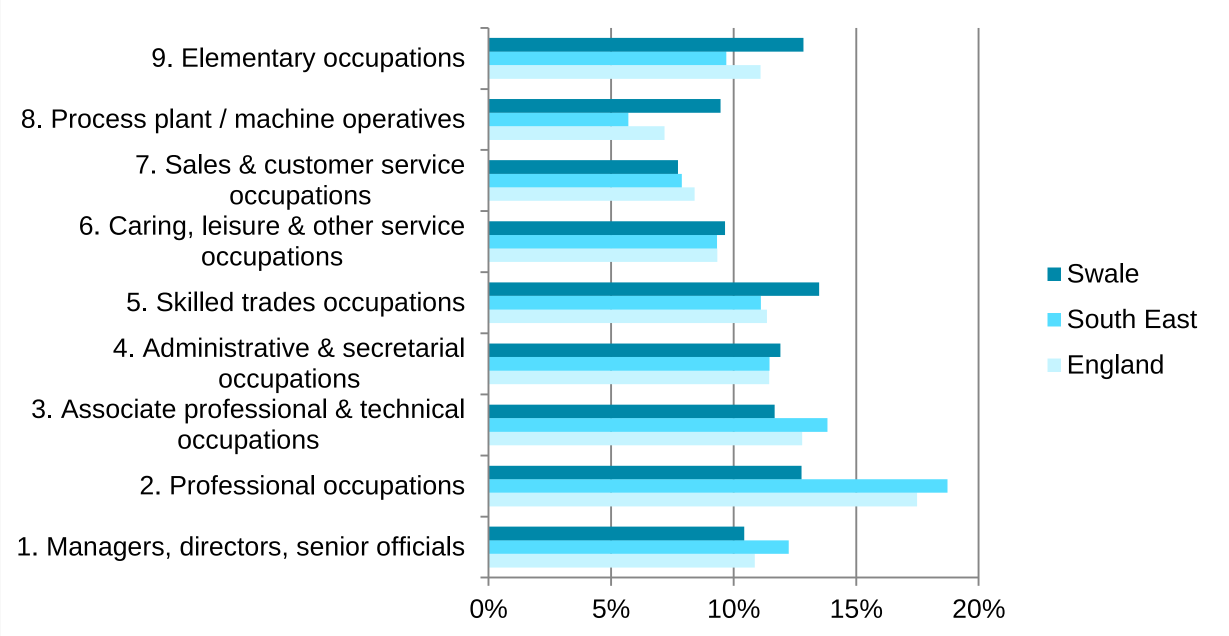
Figure 6.2 Highest level qualifications



6.14 The Borough records generally lower levels of formal qualification attainment compared to regional and national figures. Just 18.9% of residents aged 16 and above have at least a Level 4 Qualification[29], fewer than at regional level (29.9%) and national level (27.4%). Correspondingly, a much greater proportion of Swale's population have no qualifications (27.4%) than at regional level (19.1%) or national level (20.7%). This reflects the fact that Sittingbourne is the largest town in Kent without further education provision.[30]

[29] ONS (2011) Census 2011, Qualifications and Students (WD501EW) [online] available at: https://www.ons.gov.uk/census/2011census
[30] http://kmep.org.uk/documents/KMEP_Growth_Deal.pdf [last accessed 25/03/18].

Figure 6.3 Occupation of residents aged 16-74 in full time employment



6.15 Figure 6.3 highlights the high proportion of residents employed in elementary occupations and lower proportion of residents in professional occupations. This is consistent with the relatively low educational attainment in the Borough.

6.16 However, it is also apparent that Swale may have potential for a broader-based economy as currently no single sector provides a dominant source of employment. The three most well represented sectors – elementary occupations, skilled trades and professional occupations – are each from very different parts of the skills hierarchy which suggests that the Borough has potential to achieve a more diversified economy and sustainable variety of employment with potential to support both economic and population growth.

Future baseline

6.17 The adopted Local Plan has identified several sectors with potential to support economic growth in the future.[31] These include:

- General and advanced manufacturing
- Distribution
- Agriculture
- Finance and services
- Low carbon technologies
- Healthcare and biotech
- ICT and telecommunications
- Construction
- Retail, leisure and tourism

6.18 These opportunities assume growth both in high tech industries and further consolidation in sectors which are already established and successful, such as agriculture. The wide range of sectors projected to have potential for growth within the Borough may help support sustainable residential growth but it will be important to integrate development with economic opportunities and to maximise the potential of the growing high-tech sector where possible.

[31] Ibid

6.19 Relatively low educational attainment in the Borough might suggest that the successful science, research and development sectors as well as advanced manufacturing may be drawing some of its resources from outside the Borough. This could have implications for the levels of congestion on the Borough's road network among other things. Boosting educational attainment within the Borough could help further enhance the diversity and sustainability of the Borough's economy whilst also helping high tech employers source workers more locally.

6.20 Regeneration of Central Sittingbourne is expected to reinvigorate the town centre and attract additional users through the enhancement of the town centre retail offer, provision of a cinema and performance space and enhanced connectivity between the train station and the town centre.

6.21 This dovetails with the Swale Visitor Economy Framework 2018-2023 which sets out an objective to increase tourism's value to the Borough from £193m to £218m by 2023 through priorities including developing and promoting different local identities, improving infrastructure and public realm, supporting specific tourism sectors and developing the Borough's cultural offer.

Key issues and objectives

6.22 The following key issues emerge from the context baseline review:

- Swale's economy is traditionally narrow but shows signs of diversification by providing a range of employment from low skilled through to skilled trades to professional occupations. This suggests a sustainable economic platform for further growth in the Borough could be achievable.
- Average educational attainment is lower and levels of economic inactivity among working-age residents slightly higher than regional and national averages.
- The current absence of further education facilities in the Borough is likely contributing to lower attainment of Level 4 qualifications than regional and national averages.
- Infrastructure upgrades will be necessary to avoid future growth being constrained, particularly at Junction 5 of the M2.
- The identified regeneration opportunities in the main town centres in the Borough have potential to act as a catalyst for increased economic investment and growth.

6.23 In light of the key issues discussed above it is proposed that the SA framework should include the following objectives:

- Support the achievement of economic growth objectives, including in targeted growth sectors and established employment sectors.
- Support a strong, diverse and resilient economy that provides opportunities for all.
- Support and enhance the vitality of the Borough's town centres including through the identification of further regeneration opportunities where appropriate.
- Support provision of further education facilities in the Borough where practicable.

7. Flood risk

Context

National

7.1 The National Planning Policy Framework (NPPF) recognises the critical role that planning has to play in managing and mitigating the threat from flooding to communities. The key messages from the NPPF include:

- Direct development away from areas highest at risk of flooding, with development not to be allocated if there are reasonably available sites appropriate for the proposed development in areas with a lower probability of flooding. Where development is necessary, it should be made safe without increasing levels of flood risk elsewhere.
- Take account of the effects of climate change in the long term, taking into account a range of factors including flooding. Adopt proactive strategies to adaptation and manage risks through adaptation measures including well planned green infrastructure.

7.2 The draft revised NPPF adds that major developments should incorporate sustainable drainage systems (SuDS) unless there is clear evidence that this would be inappropriate.

7.3 The Climate Change Act 2008[32] established a framework to develop an economically credible emissions reduction path. The Act sets targets for greenhouse gas (GHG) emission reductions through action in the UK of at least 80% by 2050, and reductions in CO_2 emissions of at least 26% by 2020, against a 1990 baseline.

7.4 The Flood and Water Management Act (2010)[33] sets out measures to ensure that risk from all sources of flooding, not just rivers and seas, are managed more effectively. This includes: incorporating greater resilience measures into the design of new buildings; utilising the environment in order to reduce flooding; identifying areas suitable for inundation and water storage to reduce the risk of flooding elsewhere; roll back development in coastal areas to avoid damage from flooding or coastal erosion; and creating sustainable drainage systems (SuDS).

Regional

7.5 The Medway Estuary and Swale and The Isle of Grain to South Foreland SMPs (2008)[34] identify sustainable long-term policies to protect coastal communities and environments through a range of measures and strategies ranging from actively intervening to protect built up areas to managing the natural erosion and change to coastlines in less populated areas.

7.6 Flood Risk to Communities (Swale) (2017)[35] prepared by Kent County Council in conjunction with the Environment Agency and Swale Borough Council provides an overall picture of flood risk in the Borough and proposes approaches to managing and mitigating identified risks.

7.7 The Medway Estuary and Swale Strategy (MEASS) is being prepared by the Environment Agency and will review the regional SMPs to add detail to the SMP framework and set flood risk and coastal erosion objectives for the 100 year period.

[32] Climate Change Act 2008 [online] available at: http://www.legislation.gov.uk/ukpga/2008/27/contents Accessed Aug 2017
[33] Flood and Water Management Act (2010) [online] available at: http://www.legislation.gov.uk/ukpga/2010/29/contents Accessed Aug 2017
[34] South East Coastal Group 'Shoreline Management Plans' [online] available from: http://www.se-coastalgroup.org.uk/category/shoreline-management-plans/ [last accessed 28/03/18].
[35] Kent County Council (2017), 'Flood Risk to Communities – Swale' [online], available from https://www.kent.gov.uk/__data/assets/pdf_file/0010/71668/Flood-risk-to-communities-in-Swale.pdf [last accessed 29/03/18]

Local

7.8 The adopted Local Plan identifies that Swale's coastline is in 'the front line of climate change' and is therefore vulnerable to flooding and coastal erosion. The Local Plan establishes that a strategy of adaptation and mitigation will be employed including:

- Establishing a coastal change management area
- Expecting new developments to incorporate sustainable drainage systems (SuDS) as standard
- Encouraging sustainable design and construction in all developments
- Directing development towards the least vulnerable and most sustainable locations

7.9 The Strategic Flood Risk Assessment (SFRA) for the Borough was prepared in 2009 and informs the plan-making process, assists development management decision making and assists developers in the preparation of Flood Risk Assessments. The SFRA identifies that land adjoining Faversham Creek is largely within Flood Zone 3b which is functional flood plain. Consequently, a Supplementary Statement for Faversham Creek was prepared in 2010 to provide specific guidance on development in the Faversham Creek area in light of its Flood Zone 3b status.

7.10 The Swale Surface Water Management Plan (2012) identifies 22 surface water flooding 'hotspots' across the Borough a number of general and site specific actions to manage flood risk at these locations[36].

Baseline

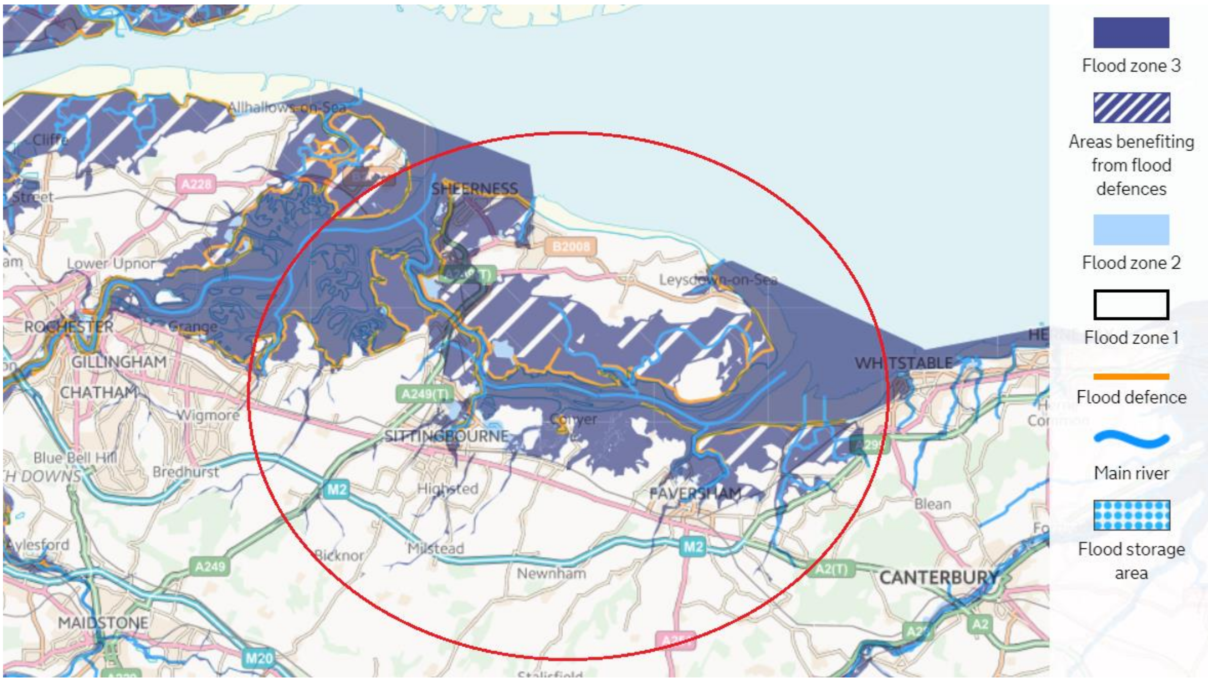
Current baseline

7.11 Swale Borough has 111km of coastline, the longest of any local authority in Kent, and this is reflected in the level of flood risk in the Borough. Major flood events have occurred in the Borough with relative frequency with the most significant occurring in 1953, 1978 and 2013.

Figure 7.1 below illustrates the extent of river and sea flood risk in the Borough:

[36] Kent County Council (2012), 'Swale Surface Water Management Plan' [online], available from: https://www.kent.gov.uk/__data/assets/pdf_file/0011/50015/Swale_SWMP_Stage_1_Report.pdf [accessed 24/03/18].

Figure 7.1: River and sea flood risk[37] (approximate Plan Area shown in red)



7.12 The Borough's coastal location and low lying landform make it vulnerable to flooding and correspondingly the majority of the coastal areas of the district fall within Flood Zone 3. The SFRA Level 2 found that an area immediately adjacent to Faversham Creek was within Flood Zone 3b which is functional flood plain. Some of the more populated areas of the Borough which are within Flood Zone 3, such as Sheerness, benefit from flood defences.

7.13 The majority of the non-coastal areas of the Borough are in the lowest risk Flood Zone 1.

7.14 There is more widespread risk of surface water flooding throughout the Borough associated with the extensive network of minor water courses and drainage ditches which crisscross the area, particularly in lower lying parts of the Borough. In most non-coastal areas surface water flood risk is only evident in very narrow corridors either side of a watercourse though in the lower lying parts of Sittingbourne, Faversham, Sheppey and coastal rural areas the surface water flood risk can be much broader.

Future baseline

7.15 Development can have the potential to increase flood risk through factors such as changing surface and ground water flows, overloading existing inputs to the drainage and wastewater networks or increasing the number of residents exposed to areas of existing flood risk.

7.16 Maintaining and enhancing tidal flood defences will be key to ensuring the impact from future flood events is mitigated. The 2017 Flood Risk to Communities (Swale) document notes that tidal defences "prevented inundation" during the 2013 flood event, highlighting their importance. Increasing pressure on tidal and fluvial defences is widely anticipated from climate change and it will be important that future development is well integrated with current and future flood risk planning.

[37] HM Government (2018), 'Flood map for planning' [online], available from: https://flood-map-for-planning.service.gov.uk/ [accessed 29/03/18].

Key issues and objectives

7.17 The following key issues emerge from the context baseline review:

- Coastal parts of the Borough are vulnerable to flooding with the main sources of flooding being the Medway, Swale and Thames estuaries.
- Tidal flood defences are in place to protect some particularly vulnerable areas of coastline.
- Flood risk is also high adjacent to some smaller waterways, particularly around Faversham Creek and Conyer Creek.
- Climate change is likely to increase sea levels and cause weather to become more variable. It is therefore likely that the flood risk from tidal sources in the Borough will continue to increase over time.

7.18 In light of the key issues discussed above it is proposed that the SA framework should include the following objectives:

- Avoid and mitigate flood risk by directing development away from the areas of the Borough at the highest risk of flooding.
- Support the priorities identified in the Medway Estuary and Swale SMP and the Isle of Grain to South Foreland SMP.

8. Heritage

Context

National

8.1 The National Planning Policy Framework (NPPF) places a high degree of significance on managing harm to heritage assets though high quality design of new development and conserving heritage assets. 'Heritage assets' is a broad term and can refer to a wide variety of built heritage from pre-historic to recent history. It can also take account of the roles and character that the natural environment can have on helping define the particular character of historic buildings and structures. Therefore there is a degree of overlap between conserving and enhancing built heritage and the natural environment.

8.2 The NPPF requires Local Authorities to:

- Protect and enhance valued landscapes, giving particular weight to those identified as being of national importance.
- Maintain the character of the undeveloped coast, protecting and enhancing its distinctive landscapes, particularly in areas defined as Heritage Coast, and improve public access to and enjoyment of the coast.
- Recognise that heritage assets are an 'irreplaceable resource' and conserve them in a 'manner appropriate to their significance'.

8.3 The draft revised NPPF adds that developers should be required to 'record and advance understanding of the significance' of any heritage assets that will be lost through development and that these records must then be publically accessible.

8.4 The NPPF's messages on Heritage are supported by the National Planning Practice Guidance (NPPG)[38] which itself includes the key message that local authorities should set out in their Local Plans a positive strategy for the conservation and enjoyment of the historic environment. The strategy should recognise that conservation is not a passive exercise. In developing their strategy, local planning authorities should identify specific opportunities within their area for the conservation and enhancement of heritage assets.

8.5 Historic Environment for England (2010)[39] sets out the Government's vision for the historic environment. It calls for those who have the power to shape the historic environment to recognise its value and to manage it in an intelligent manner in light of the contribution that it can make to social, economic and cultural life.

Regional

8.6 The Kent Environment Strategy (2016) reinforces the links between landscape and historic character by aiming to strengthen the understanding of the health, social and economic value of historical assets in Kent to enhance the protection and enjoyment of the region's historic character.

Local

8.7 The adopted Local Plan identifies that historic assets and the historic environment make an important contribution to the Borough's sense of place and identity. The Plan establishes that a

[38] Department for Communities and Local Government (2012) National Planning Practice Guidance [online] available at: http://planningguidance.communities.gov.uk/ Accessed Aug 2017
[39] HM Government (2010) The Government's Statement on the Historic Environment for England [online] available at: http://webarchive.nationalarchives.gov.uk/+/http://www.culture.gov.uk/reference_library/publications/6763.aspx Accessed Aug 2017

heritage strategy will be developed to sustain and enhance the significance of designated and non-designated heritage assets.

8.8 The Swale Heritage Asset Review (2015) comprehensively identifies and assesses Swale's historic environment, the needs and conservation status of its assets to inform the preparation of the proposed Heritage Strategy.

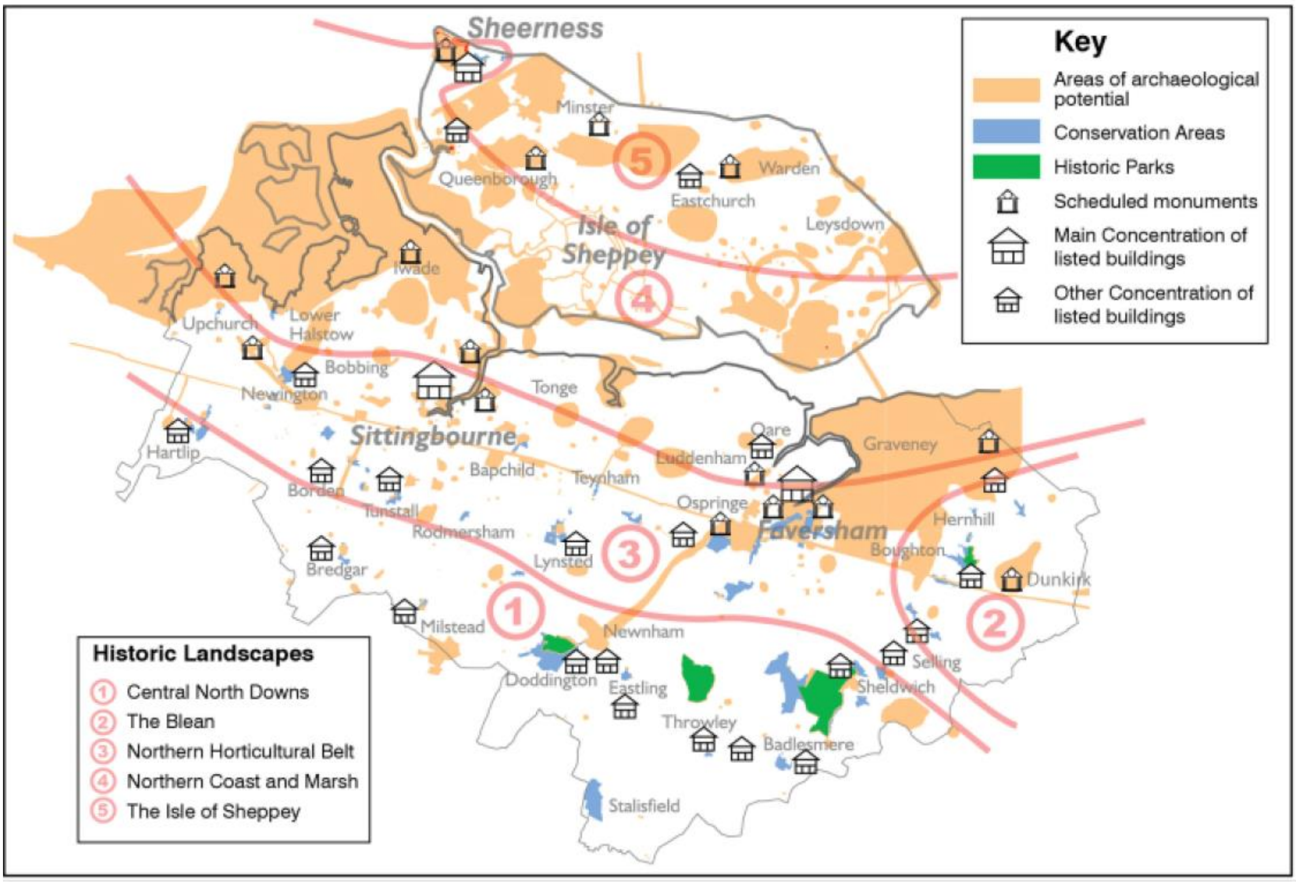
Baseline

Current baseline

8.9 Swale has a large number of historic assets including:

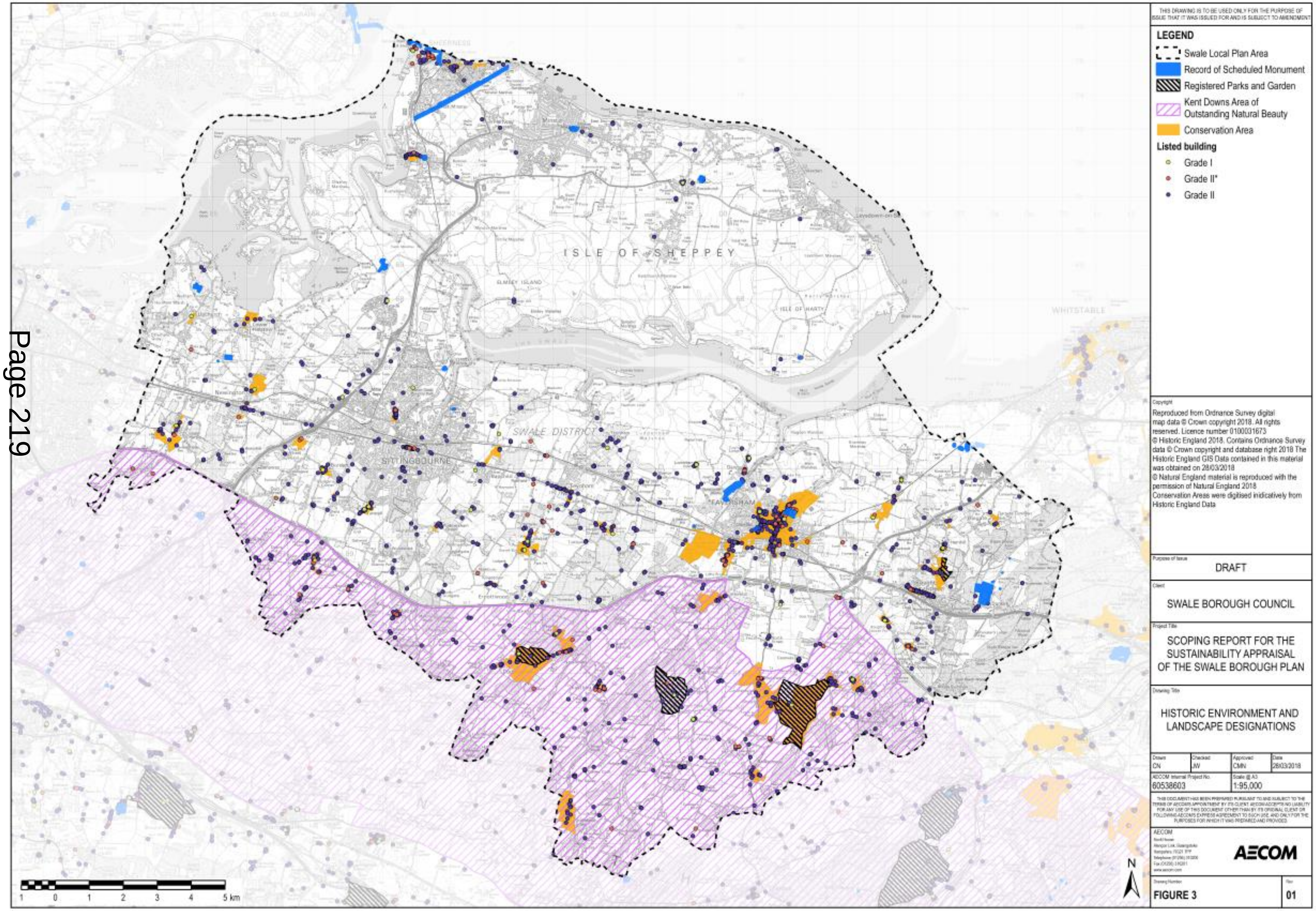
- 1,856 listed buildings, including 91 at Grade II* and 37 at Grade I
- 22 scheduled monuments;
- 4 registered historic parks and gardens, and;
- 50 designated conservation areas.

Figure 8.1 Historic assets and features in Swale (overview)[40]



[40] Swale Borough Council (2017), 'Bearing Fruits 2031: The Swale Borough Local Plan' [online], available from: http://services.swale.gov.uk/meetings/documents/s7987/FULL%20COUNCIL%2026%20JULY%20Local%20Plan%20Item%20Appdx%201%20Bearing%20Fruits%202031%20The%20Swale%20Borough%20Local%20Plan.pdf [last accessed 26/03/18].

Figure 8.2 Historic assets in Swale (detailed)



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8.10 The Borough has historic features from a broad time span and includes evidence of Roman, Saxon and Norman settlements through to World War II defences along the coastline and elsewhere. The historic landscapes of the North Downs, the Blean, the fruit belt and the coastal marshes along with historic patterns of land use contribute further to the fabric of the Borough's heritage.

8.11 The Borough's strategic coastal location at the mouth of the Thames estuary is reflected in its maritime heritage particularly the defence infrastructure associated with the former Royal Navy dockyard and Bluetown in Sheerness. The historic character of central Sittingbourne and the rich historic fabric of the market town of Faversham are also key heritage characteristics of the Borough.

Future baseline

8.12 New development within the Borough has the potential to impact heritage assets and their settings through inappropriate design and layout. There are already a number of historic assets at risk and these could potentially deteriorate further without intervention or as a result of inappropriate development.

8.13 It should be noted, however, that existing historic environment designations will continue to offer a degree of protection to cultural heritage assets and their settings. Additionally, new development need not be harmful to the significance of a heritage asset and can provide opportunities to enhance the setting of an asset and better reveal its significance.

Key issues and objectives

8.14 The following key issues emerge from the context baseline review:

- There are a range of designated heritage assets present within the Borough, including 22 Scheduled Monuments, 50 Conservation Areas and 1,856 listed buildings.
- There are 18 designated heritage assets identified by Historic England as being at risk ranging from historic naval defence structures to churches to the entire High Streets of Sittingbourne and Milton Regis.

8.15 In light of the key issues discussed above it is proposed that the SA framework should include the following objective:

- Conserve and enhance heritage assets and contribute to the maintenance of historic character through design, layout and setting of new development.

9. Housing

Context

National

9.1 Key messages from the National Planning Policy Framework (NPPF) include:

- Boosting 'significantly the supply of housing', local planning authorities should meet the 'full, objectively assessed need for market and affordable housing' in their area. They should prepare a Strategic Housing Market Assessment to assess their full housing needs, working with neighbouring authorities where housing market areas cross administrative boundaries. The Strategic Housing Market Assessment should identify the scale and mix of housing and the range of tenures that the local population is likely to need over the plan period.
- In rural areas local planning authorities should plan housing development to reflect local needs, particularly for affordable housing, including through rural exception sites where appropriate.
- The NPPF attaches great importance to the design of the built environment. Design should reinforce local distinctiveness, raise the standard more generally in the area and address the connections between people and places.
- Local Planning Authorities should work with the other local authorities in the relevant housing market area or functional economic market area in line with the duty to cooperate. This is because such needs are rarely constrained precisely by local authority administrative boundaries.

9.2 Key messages from the draft revised NPPF include:

- Small sites can make a key contribution to meeting housing need and that Local Authorities should therefore ensure that at least 20% of identified housing sites are half a hectare or smaller.
- Strategic plans should set out a housing requirement figure for designated neighbourhood areas

9.3 In February 2017 the government published the Housing White Paper titled 'Fixing our broken housing market'.[41] Key points in relation to housing delivery include a new standardised methodology for calculating housing need and a drive to increase densities in the most sustainable locations, particularly near transport hubs such as train stations. For Swale this new calculation results in a significant increase in Objectively Assessed Housing Need (OAHN) from the current position of 776 dwellings per annum to 1,054 dwellings per annum.

Local

9.4 Key messages from the adopted Local Plan in relation to housing include:

- Delivering a wide choice of high quality homes, of good design and creating safe accessible and attractive places through development are key objectives.
- Objectively Assessed Housing Need is 13,126 dwellings over the Plan Period or 776 dwellings per annum.
- Affordable housing need is 190 dwellings per annum though viability issues could suppress true delivery.

[41] MHCLG (2017), 'Housing White Paper' [online], available from: https://www.gov.uk/government/collections/housing-white-paper

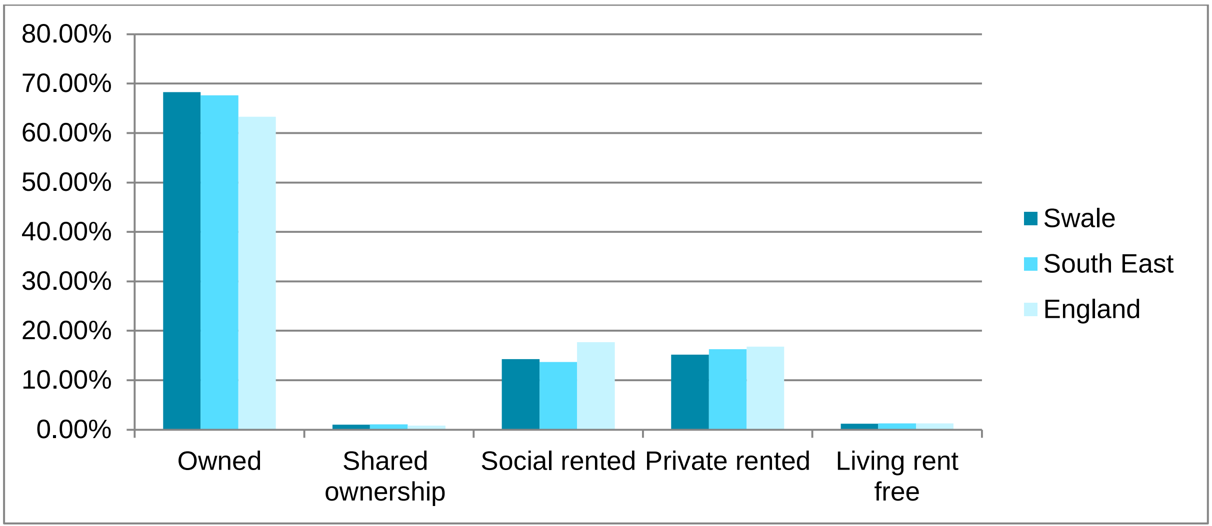
- 85% of housing delivery will be delivered in the Swale Thame Gateway (Sittingbourne and Sheppey) with the remaining 15% delivered at Faversham and the rest of Swale.

Baseline

Current baseline

9.5 There is considerable housing pressure in Swale, as with many areas in the South East of England, and trends in the Borough more closely reflect those of the South East region than those on a national scale. This is illustrated in part by Figure 9.1 below:

Figure 9.1 Housing tenure



9.6 Figure 9.1 illustrates that housing tenure in the Borough is broadly in line with regional averages though there are some disparities with national averages. The rate of home ownership in Swale is 68.3%, slightly higher than the South East (67.6%) and higher than England as a whole (63.3%). Correspondingly there is a slightly smaller private rental sector in Swale than at regional and national levels.

9.7 The 2015/16 Swale Authority Monitoring Report (AMR), which is the most recently published, notes that housing completions over the first two years of the Local Plan period (2014/15 and 2015/16) averaged 608 dwellings per annum (dpa). This completion rate is below the target of 776 dpa but represents an increase on the five year average (465 dpa) and ten year average (556 dpa).[42]

9.8 The 2015/16 AMR notes that affordable housing delivery dropped from 156 dwellings in 2014/15 to just 60 in 2015/16, well short of the Council's 30% target. The AMR attributes this drop to changes in national policy rather than local factors.

Future baseline

9.9 The Government's proposed changes to the methodology for calculating housing need show an indicative increase of nearly 25% in the level of need per annum for Swale.[43] Current Objectively Assessed Need is for 776 dpa which rises to 1,054 dpa under the proposed standardised methodology. Whilst the standardised methodology is not yet adopted the scale of potential increase in need clearly indicates that a significant increase in the level of development is likely to be required in the Borough.

[42] Swale Borough Council (2016), 'The Swale Borough Local Plan Annual Monitoring Report 2015/16' [online], available from: https://archive.swale.gov.uk/assets/Planning-General/Planning-Policy/Annual-Monitoring-Report/AMR-2015-16.pdf [last accessed 24/03/18].
[43] MHCLG (2017), 'Planning for the right homes in the right places' [online], available from: https://www.gov.uk/government/consultations/planning-for-the-right-homes-in-the-right-places-consultation-proposals#history [last accessed 01/0418].

9.10 There are a number of constraints in the Borough including flood risk, AONB designation and large amounts of best and most versatile land and it may be the case that future development will need to be delivered at higher densities within existing settlements or via new settlements to ensure need is met.

9.11 Swale Borough Council were successful in the first round of their 2017 bid for central government funding via the Housing Investment Fund (HIF) mechanism for the Queenborough and Rushenden Regeneration scheme and it is anticipated that up to 1,180 dwellings will come forward over the Plan Period. This scheme seeks to unlock capacity on existing brownfield sites on the Isle of Sheppey through central government funding.

Key issues and objectives

9.12 The following key issues emerge from the context baseline review:

- The adopted Local Plan includes a housing delivery target of 776 dpa.
- The 2015/2016 Annual Monitoring Report (AMR) records an average delivery over the preceding ten years of 556 dpa meaning current rates of housing delivery will need to be enhanced to meet the target.
- The proposed standardised methodology for housing need calculation would see Swale's annual housing need increase from 776 dpa to 1,054 dpa. The proposed changes are not yet adopted but indicate that the Borough may need to find even more supply than currently planned for.
- There is a need for more affordable housing in the Borough of 190 dwellings per annum though in practice viability issues negatively impact delivery of affordable housing.

9.13 In light of the key issues discussed above it is proposed that the SA framework should include the following objectives:

- Support timely delivery of market housing and affordable housing.
- Promote an appropriate mix of housing types and tenures.
- Cater for existing and future residents' needs as well as the needs of different groups in the community.

10. Land

Context

National

10.1 Key messages from the National Planning Policy Framework (NPPF) include:

- Protecting and enhancing soils and protecting the value of best and most versatile agricultural land where applicable. This means that where significant development of agricultural land is demonstrated to be necessary, local planning authorities should seek to use areas of poorer quality land in preference to that of a higher quality.
- Preventing new or existing development from being 'adversely affected' by the presence of 'unacceptable levels' of soil pollution or land instability and be willing to remediate and mitigate 'despoiled, degraded, derelict, contaminated and unstable land, where appropriate'.
- Encouraging the effective use of land' through the reuse of land which has been previously developed, 'provided that this is not of high environmental value'.

10.2 The draft revised NPPF stresses the importance of protecting and enhancing bio- and geodiversity which represents a shift in tone away from minimising harm towards a more positive emphasis on enhancement.

10.3 Safeguarding our Soils: A strategy for England[44] sets out a vision for soil use in England which includes better protection for agricultural soils, protecting stores of soil carbon, improving the resilience of soils to climate change and preventing soil pollution. The essential message in relation to development is that pressure on soils is likely to increase in line with development pressure and the planning system should seek to mitigate this.

10.4 Government Review of Waste Policy in England[45] recognises that environmental benefits and economic growth can be the result of a more sustainable approach to the use of materials.

Regional

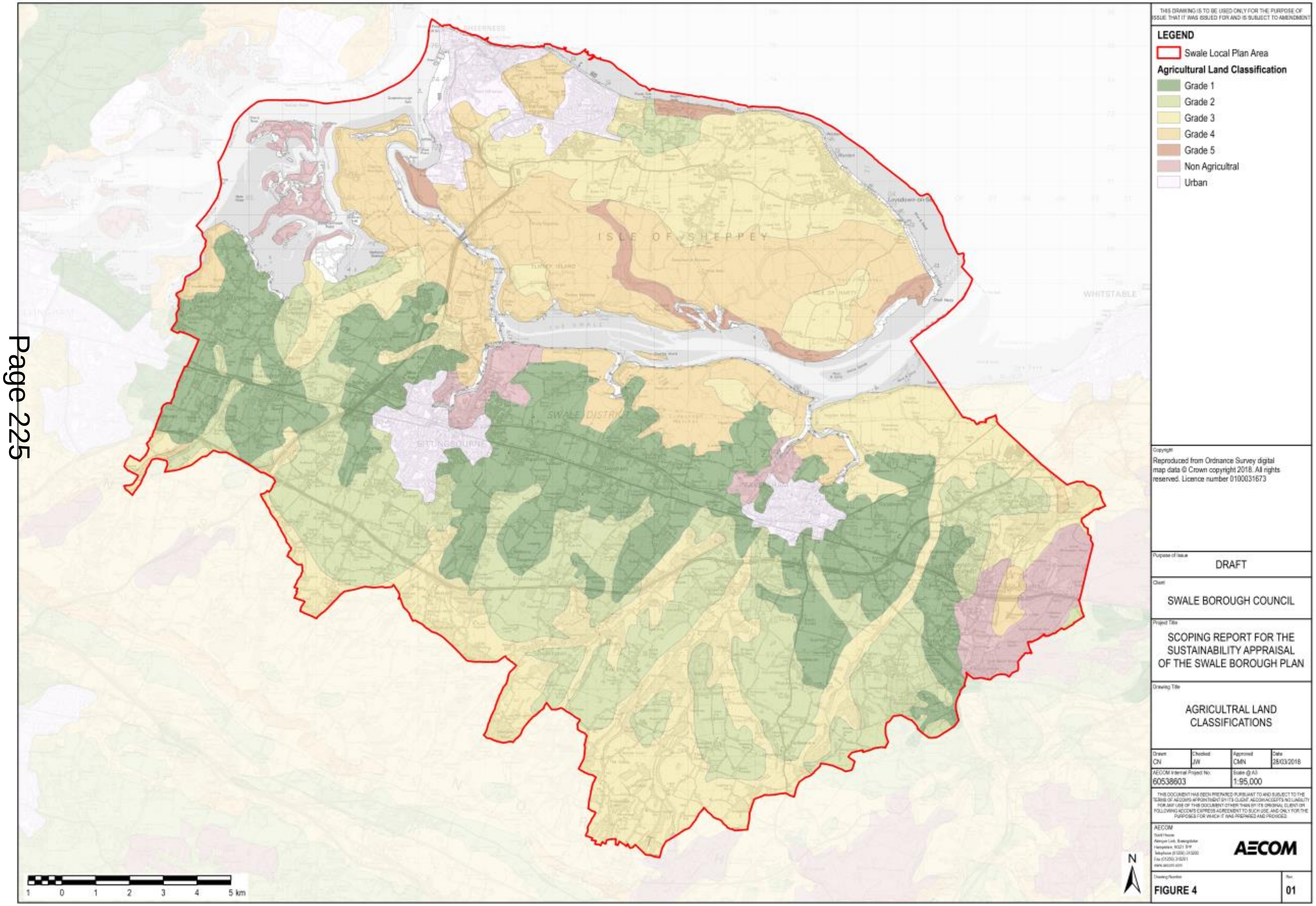
10.5 Kent Minerals and Waste Local Plan (KMWLP) 2013-2030 sets out the strategy for mineral provision and waste management in Kent. In two-tier authorities Minerals and Waste Planning is the responsibility of the higher tier authority, in this case Kent County Council who adopted the current Plan in 2016 and is currently undertaking an Early Partial Review of the Plan.

Local

10.6 The Borough's rich agricultural heritage is a key theme in the adopted Local Plan. The Plan identifies the importance in protecting the rich fertile soils which underpin this. The importance of soil quality to the future of fruit growing and other traditional agriculture in the Borough is identified, both as a way of protecting food security and employment and as a means of preserving the Borough's traditions and heritage.

[44] Defra (2009) Safeguarding our Soils: A strategy for England [online] available at: https://www.gov.uk/government/publications/safeguarding-our-soils-a-strategy-for-england [last accessed 29/03/18]
[45] Defra (2011) Government Review of Waste Policy in England [online] available at: http://www.defra.gov.uk/publications/files/pb13540-waste-policy-review110614.pdf

Figure 10.1 Agricultural land classification



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Baseline

Current baseline

10.7 The Agricultural Land Classification (ALC) classifies land into six grades (plus 'non-agricultural' and 'urban'), where Grades 1 to 3a are recognised as being the 'best and most versatile' land and Grades 3b to 5 are of poorer quality. The subdivision of Grade 3 into 3a and 3b has not been undertaken on a national scale, including within the Plan area, and Grade 3 land is therefore presumed to be best and most versatile unless and until evidence can be provided to demonstrate it is 3b not 3a.

10.8 There is considerable diversity of agricultural land quality within the Borough. Areas of Grades 1 to 5 are all present as well as land classified as 'non-agricultural' and as 'urban' (see Figure 10.1). A band of Grade 1 and 2 runs through the centre of the Borough forming the spine of the Fruit Belt, punctuated by the urban areas of Sittingbourne and Faversham. To the south of this, as the Fruit Belt gives way to the Kent Downs AONB, the land transitions to Grade 3.

10.9 Land immediately to the north of the Fruit Belt is generally of poorer quality. A large strip of land either side of the Swale estuary on both the mainland and the Isle of Sheppey is Grade 4 and there are areas of Grade 5 around some coastal areas of Sheppey along with urban and non-agricultural land around Sheerness. The north east of the Island sees a return to better quality land with an area of Grade 3 and a pocket of Grade 2 land occupying much of the north east.

10.10 The KMWLP identifies significant minerals safeguarding areas in the Borough. The majority of these are made up of either sub-alluvial river terrace deposits on Sheppey or areas of brickearth mostly concentrated along the A2 corridor and Fruit Belt area. The KMWLP also defines exemptions from the presumption to safeguard designated minerals deposits in these areas.

10.11 Kent County Council (KCC) is the Waste Disposal Authority for Swale. KCC operates three Household Waste Recycling Centres (HWRC) within the Borough located at Sittingbourne, Faversham and Sheerness.

Future baseline

10.12 Existing planning policy encourages the efficient use of land and a preference for the recycling and development of brownfield land to meet as greater a proportion of development needs as possible. However, there are a range of reasons why developing greenfield land can also be necessary to help meet identified needs, particularly if brownfield land supply is limited or constrained by factors such as contamination from previous uses.

10.13 Therefore, although Sittingbourne, Sheerness and, to a lesser extent, Faversham are important regional settlements and could have potential to support a degree of brownfield development very few authorities are able to meet their needs through brownfield land alone and it is therefore likely that development will be necessary on land currently in agricultural use. Although there are areas within the Borough which are of lower quality much of these areas have significant other constraints in practice. For example, much of the area of Grade 4 is on Sheppey but this area would be inappropriate to develop on the basis of flood risk, biodiversity and other constraints.

10.14 It is considered likely therefore that a degree of future development within the Borough will be directed towards areas of the best and most versatile agricultural land. It could be important to identify opportunities to direct development towards areas of Grade 3 and away from Grades 1 and 2.

10.15 New development is likely to increase demand for waste and recycling services and could potentially require expansion of existing HWRCs and Waste Transfer Stations or the creations of new ones.

Key issues and objectives

10.16 The following key issues emerge from the context baseline review:

- Land classified as the best and most versatile agricultural land is present in parts of the Borough including significant areas of Grade 1 land.
- Extensive areas of minerals safeguarding extend across parts of the Borough and could have potential to impact the deliverability of sites in some areas.

10.17 In light of the key issues discussed above it is proposed that the SA framework should include the following objective:

- Promote the efficient and sustainable use of natural resources, including supporting development which avoids the best and most versatile agricultural land and development which makes effective use of previously developed land.

11. Landscape

Context

National

11.1 The National Planning Policy Framework (NPPF) establishes that Local authorities should set out in their Local Plans a positive strategy for the conservation and enjoyment of the historic environment. The strategy should recognise that conservation is not a passive exercise. In developing their strategy, local planning authorities should identify specific opportunities within their area for the conservation and enhancement of heritage assets.

11.2 Other key messages include:

- Protecting and enhancing valued landscapes, giving particular weight to those identified as being of national importance.
- Maintaining the character of the undeveloped coast, protecting and enhancing its distinctive landscapes, particularly in areas defined as Heritage Coast, and improve public access to and enjoyment of the coast.
- Recognising that heritage assets are an 'irreplaceable resource' and conserve them in a 'manner appropriate to their significance'.
- Local plans should include strategic policies for the conservation and enhancement of the natural environment, including landscape. This includes designated landscapes but also the wider countryside.

11.3 The draft revised NPPF adds that:

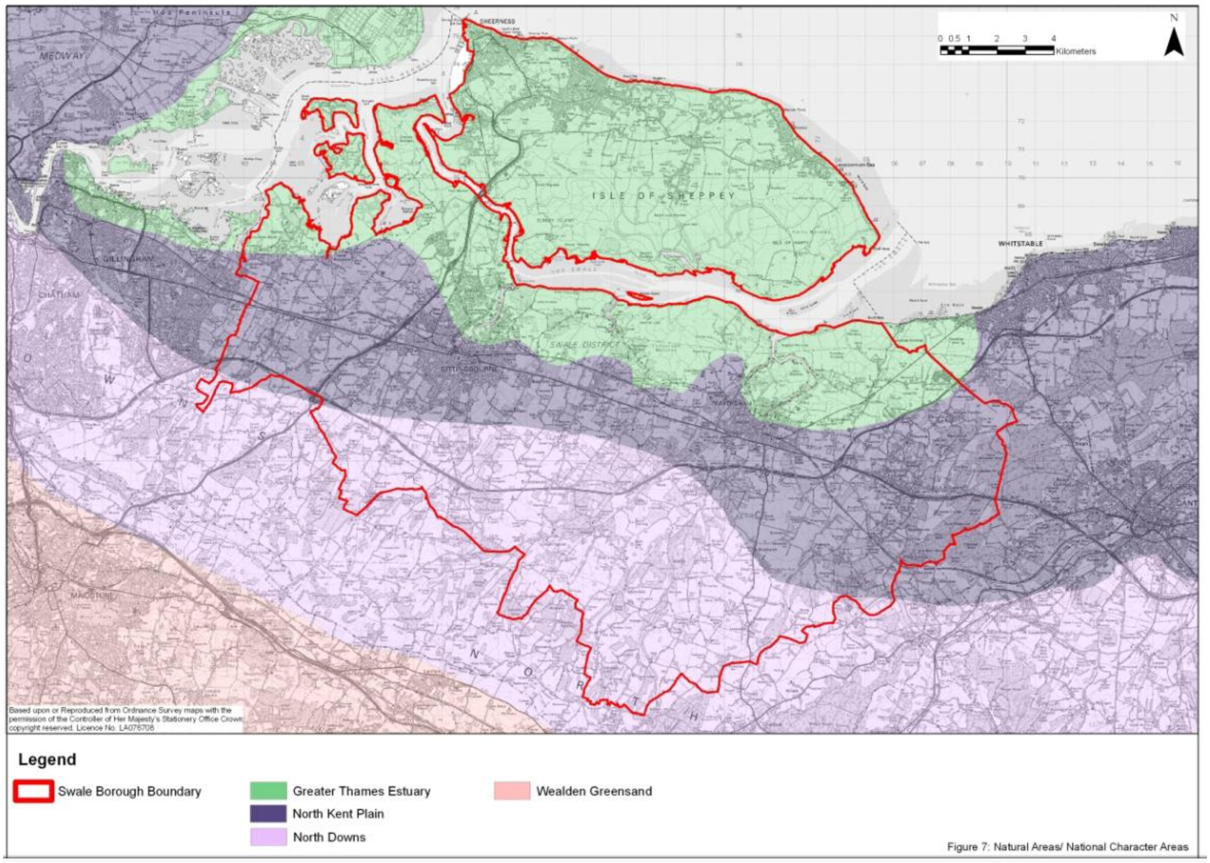
- Planning policies and decisions should recognise "the wider benefits from natural capital including the economic and other benefits of agricultural land, trees and woodland".
- Planning policies should maintain the character of and enhance access to the undeveloped coast.

11.4 Historic Environment for England[46] sets out the Government's vision for the historic environment. It calls for those who have the power to shape the historic environment to recognise its value and to manage it in an intelligent manner in light of the contribution that it can make to social, economic and cultural life. Also of note is the reference to promoting the role of the historic environment within the Government's response to climate change and the wider sustainable development agenda.

11.5 Natural England's National Character Area profiles divide England in 159 distinct natural areas based on their landscape, biodiversity, geodiversity, historic, cultural and economic characteristics.[47] National Character Areas (NCAs) follow natural features in the landscape and are not aligned with administrative boundaries. NCA profiles describe the features which shape each of these landscapes, providing a broad context to its character. The Borough is split between three National Character Areas (NCAs), each of which run in a lateral east-west alignment. These are NCA 81 Greater Thames Estuary; NCA 113 North Kent Plain; and NCA 119 North Downs.

[46] HM Government (2010) The Government's Statement on the Historic Environment for England [online] available at: http://webarchive.nationalarchives.gov.uk/+/http://www.culture.gov.uk/reference_library/publications/6763.aspx [accessed 16/03/18].
[47] Natural England (2012) 'National Character Area profiles' [online], available from: https://www.gov.uk/government/publications/national-character-area-profiles-data-for-local-decision-making [accessed 24/05/18].

Figure 11.1 National Character Areas in Swale Borough[48]



Regional

11.6 The Kent Landscape Character Assessment (2004)[49] provides a high level, county-wide character assessment intended to be supported at a local level by further district specific and site specific character assessments where necessary. Landscape character often transcends administrative boundaries as character is generally informed by natural features such as geology. It is therefore often appropriate to explore landscape character at a strategic scale to inform more local assessments where necessary.

11.7 Kent Downs AONB Management Plan 2014 – 2019[50] seeks an approach to managing development within the AONB which is sustainable in terms of preserving the area's tranquillity and remoteness, its setting and views, its rural character and its landscape. The Management Plan identifies a range of threats to the AONB, the most significant of which include urban growth and associated infrastructure development in close proximity to the AONB and the corresponding increase in visitors to the area.

Local

11.8 The adopted Local Plan identifies that the Borough has a number of distinctive landscapes in addition to those protected by AONB designation. These are the central North Downs, the Northern Horticultural Belt, the Forest of Blean, the Northern Coast and Marshland and the Isle of Sheppey and its sub-areas.

[48] Ibid
[49] Kent County Council, 'Kent's Landscape Assessment' [online] available from: https://www.kent.gov.uk/about-the-council/strategies-and-policies/environment-waste-and-planning-policies/countryside-policies-and-reports/kents-landscape-assessment
[50] Kent Downs AONB Partnership 'Management Plan 2014-2019' (2014) [online], available from: http://www.kentdowns.org.uk/uploads/documents/KD_AONB_final_plan_09.09.14.compressed.pdf

11.9 The adopted Local Plan notes that the separate identify of the Borough's settlements contributes to the wider sense of landscape and townscape character within the Borough and. defines a number of 'Important Local Countryside Gaps' between settlements.

11.10 The Swale Landscape Character and Biodiversity Appraisal Supplementary Planning Document (2011) provides a criteria-based evidence base for informing strategic and site specific development by identifying the "diversity and distinctiveness" of landscapes within the Borough.[51]

Baseline

Current baseline

11.11 The Kent Downs Area of Outstanding Natural Beauty (AONB) covers much of the south of the Borough extending to most of the area south of the M2 motorway. Although the motorway provides a degree of severance between the AONB and the rest of the Borough some areas to the north of the M2 are likely to fall within the setting of the AONB. AONB is a designation which carries a significant degree of development constraint to help protect the features and characteristics of particular natural beauty and which might be most vulnerable to development.

11.12 The adopted Local Plan includes several Local Landscape Designations identified as Areas of High Landscape Value. These are split between larger Kent Level features which are "*scenically important in a county-wide context*" (consisting of the North Downs, Blean Woods and North Kent Marshes) and Swale Level Areas of High Landscape Value (consisting of land between Tonge and Luddenham; Iwade, Newington and Lower Halstow; Boughton Street, Henhill, Dargate and Staplestreet; and Sheppey Court and Diggs Marshes). Although these areas do not benefit from national designation the Plan requires development proposals within them to protect local landscape character and enhance the future appearance of the designated landscape where possible.

11.13 The Isle of Sheppey and the coastal areas of the Borough fall within the Greater Thames Estuary NCA, characterised by low lying island; mud flats; tidal salt marsh; and grazing marsh.

11.14 A central band between the coast and the south of the Borough fall within the North Kent Plain NCA, often called the 'Fruit Belt', characterised by low, flat topography; productive agricultural soils; orchards and other horticulture; and significant areas of ancient woodland.

11.15 The southern area of the Borough falls within the Wealden Greensand NCA which is characterised by the area's natural beauty, its scarp-and-slope topography which often yields long range views plus areas of extensive woodland and ancient woodland.

11.16 The 2011 Swale Landscape Character and Biodiversity Appraisal found that there are five broad landscape types and 42 local 'character areas' within the Borough, highlighting the diversity of landscapes, the contrast between the coastal and hinterland areas of the Borough and the richness of the natural landscape.

11.17 The 2014-2019 Kent Downs AONB Management Plan identifies 13 separate character areas within the AONB although the entire section of AONB within the Borough falls within a single one of these, the Mid Kent Downs character area.

Future baseline

11.18 New development within the Borough has the potential to lead to incremental changes in landscape quality in and around the Borough. This could include the loss of landscape features or the visual impact on existing features from inappropriate development. There could also be

[51] Swale Borough Council (2011), 'Swale Landscape Character and Biodiversity Appraisal SPD' [online] available from: http://www.swale.gov.uk/assets/Planning-General/Planning-Policy/Landscape-Character-Appraisal-Final-Sept-2011/Introduction-reduced-size.pdf [last accessed 19/03/18].

potential for new development to impact landscape quality in the vicinity of the road network from increased traffic flows.

Key issues and objectives

11.19 The following key issues emerge from the context baseline review:

- The south of the Borough lies within the Kent Downs Area of Outstanding Natural Beauty, including most land south of the M2.
- The Borough straddles three distinct National Character Areas, the Thames Estuary NCA, North Kent Plains NCA and Wealden Greensand NCA.
- There is considerable diversity of localised character in the Borough with 42 local character areas identified by the 2011 Swale Landscape Character Appraisal.

11.20 In light of the key issues discussed above it is proposed that the SA framework should include the following objectives:

- Protect and enhance the character and quality of the Borough's landscapes and townscapes through appropriate design and layout of new development.
- Protect and enhance the Kent Downs AONB where possible.
- Preserve important open gaps between settlements.

12. Transport

Context

National

12.1 Key messages from the National Planning Policy Framework (NPPF) include:

- Encouraging Local Authorities to prepare plans in which transport objectives are closely aligned to environmental objectives. For example, by encouraging land use and transport development which supports a reduction in greenhouse gas emissions and reduces congestion.
- Protecting and exploiting opportunities for the use of sustainable transport modes. In practice this could mean measures such as densifying development around transport hubs to reduce the need to travel by private vehicle.
- Embedding green infrastructure into new developments to encourage walking and cycling as attractive transport options for shorter distances.

12.2 The draft revised NPPF adds that transport issues should be considered 'from the earliest stages of plan making' to identify and address potential impacts on transport networks, exploit new technologies, pursue opportunities to promote cycling and integrate patterns of movement into scheme design.

Regional

12.3 The Kent and Medway Growth and Infrastructure Framework (2015) provides a strategic view of growth distribution and infrastructure provision at a regional scale and identifies the capacity enhancements to Junctions 5 and 7 of the M2 as key strategic priorities for the region, not just the Borough.

12.4 Kent County Council Local Transport Plan 4: Delivering Growth Without Gridlock 2016-2031 identifies that strategic transport priorities for Swale include:

- Improvements to Junctions 5 and 7 of the M2;
- Enhancing capacity on the A249 corridor; improving opportunities for east-west travel on the Isle of Sheppey and improving public transport connections within Sheppey and between Sheppey and the mainland.
- Enhancing capacity both on high speed and mainline rail services. The Transport Plan also identifies that cost of rail travel prevents its full potential to contribute to sustainable growth from being unlocked.

12.5 Kent County Council Active Travel Strategy aims to promote walking and cycling as practical and attractive means of transport for short journeys in Kent to contribute to improved health outcomes, reduced congestion, reduced pollution and lower costs at an individual and shared level.

Local

12.6 The adopted Local Plan includes themes which appear at regional level as well as more Borough-specific issues. The key messages include:

- Capacity at Junction 5 of the M2 is the most significant transport constraint in the Borough.
    - The Borough generally benefits from a strategic location along a major transport corridor between London and international rail services and ports.

- The Sittingbourne Northern Relief Road A2 Link. An area of search north of the A2 is safeguarded within which it is anticipated the missing link of the northern relief road will be delivered via Local Plan review.
- The Isle of Sheppey's transport network is underdeveloped and contributes to isolation and deprivation on the island.
- Patterns of growth to be managed in line with NPPF objectives to maximise opportunities to travel by walking, cycling and public transport.

Baseline

Current baseline

Road network and congestion

12.7 The Borough is well connected to the Strategic Road network although the connectivity is strongest in an east-west alignment and connectivity to the south is more limited. The M2 motorway and A2 trunk road both connect Swale with London to the west. The A2 continues east, connecting the borough with Canterbury and Dover. The M2 terminates within the Borough and becomes the A299, providing a link to the north east Kent coast to Margate.

12.8 The principal north-south route is the A249 which links the Isle of Sheppey with Sittingbourne and onwards to Maidstone and the M20. This principal north-south route is augmented by a number of local and rural roads across the Borough of more limited capacity. There is one single principle east-west route on the Isle of Sheppey.

12.9 Long term capacity issues at Junction 5 of the M2 are subject to a planned £50-100m improvement programme by Highways England programmed to commence in 2019/20.[52] Kent County Council have identified further capacity issues at Junction 7 of the M2 where existing capacity is coming under sustained pressure from local and regional growth. [53]

Rail network

12.10 Swale is well connected to the rail network and there are a total of 9 stations within the borough. The Chatham Main Line runs east-west through the Borough with stations at Newington, Sittingbourne, Teynham, Faversham and Oversland. The Sheerness branch line runs north from Sittingbourne to the Isle of Sheppey with stations at Kemsley, Swale, Queenborough and Sheerness.

12.11 Services in the Borough are operated by Southeastern and include some services on the Javelin High Speed train to St Pancras International. There are up to 5 services an hour between Sittingbourne and London (to various termini though predominantly London Victoria for mainline services and St Pancras for High Speed services); up to 2 services an hour between Sittingbourne and Canterbury and up to 3 services an hour between Sittingbourne and Dover. Travel time between Sittingbourne and St Pancras is around 1 hour but between Sittingbourne and other London termini it can be as much as 90 minutes. Travel time between Sittingbourne and Dover can vary between around 35 minutes to around 90 minutes.

Walking and cycling network

12.12 National Cycle Route 1, a long distance signed route stretching 1,695 miles between Dover and the Shetland Islands, passes through the Borough on its Dover-London section.

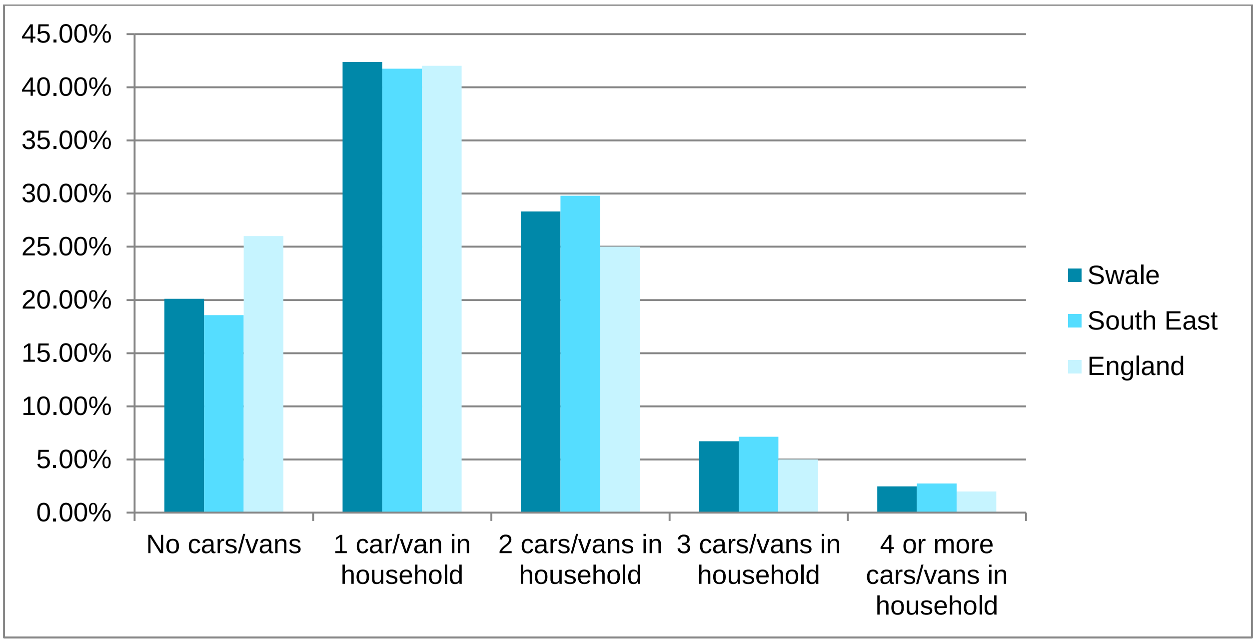
12.13 Route 1 joins National Cycle Route 174 which, when complete, will be a 9 mile route around Queenborough and Sheerness on the Isle of Sheppey.

[52] Highways England (2017) 'Improvements and Major Road Projects' [online]; available from: http://roads.highways.gov.uk/projects/m2-junction-5-improvements/ [last accessed 14/03/18].
[53] KCC (2016) http://www.kent.gov.uk/__data/assets/pdf_file/0011/72668/Local-transport-plan-4.pdf

Car and van availability

12.14 Figure 12.1 shows that at 20.1% the proportion of households in Swale with no access to a car or van is higher than the wider South East region (19%) though lower than England as a whole (26%). Car ownership overall in the Borough is higher than the national average including multiple car ownership with 37.5% of households in Swale owning 2 or more cars compared to 32% nationwide. This may reflect that many residents commute to jobs outside the Borough and some therefore require access to more than one car per household to ensure all economically active household members can access work.

Figure 12.1 Car and van ownership[54]

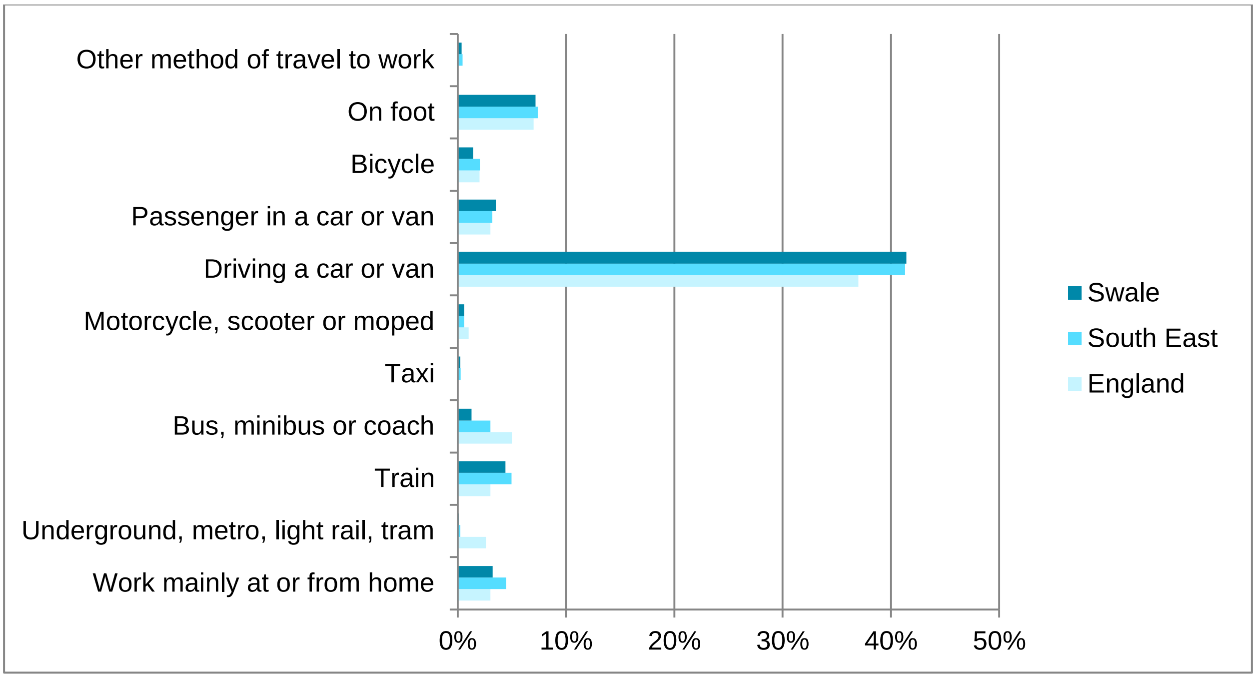


Travel to work

12.15 Figure 12.2 shows that the most common method of travelling to work in the Borough is by car or van (41.4%), in line with average for the South East (41.3%) and higher than the average for England as a whole (36.9%). This reflects the fact that many residents commute to jobs outside the Borough. Whilst the car dominates travel to work choices walking to work is a clear second most popular option at 7.2% though bicycle use is very low at 1.4%. Bus travel as a commuting option appears to be underexploited as just 1.3% of the population use this option in Swale compared with 3% in the South East and 5% in England as a whole.

[54] ONS (2011), Census 2011: 'Car or Van Availability 2011', (Table QS416EW)

Figure 12.2 Travel to work [55]



Future baseline

12.16 The M2/A2 corridor and the railway line offer a natural focus for development but existing capacity issues on the road network could constrain growth without improvement. Further improvement to transport within the Borough, and particularly to isolated areas of the Isle of Sheppey, could play an important role in tackling entrenched deprivation in some areas of the Borough.

12.17 An area of search for the Sittingbourne Northern Relief Road A2 Link has been safeguarded but is likely to only come forward via Local Plan review or as part of a new Local Plan. Should the Northern Relief Road be completed there will be implications for wider traffic movements, potentially including higher flows onto the A2 through Teynham and Ospringe which is already experiencing capacity issues.

12.18 Current high levels of relatively short distance commuting flows within Swale and between Swale and Medway contribute to the significant pressure on the A2 and M2. New development therefore represents both a risk of exacerbating this and also an opportunity to facilitate active and sustainable travel options to mitigate pressure.

12.19 There could be opportunities for future development to better integrate with sustainable transport networks by facilitating more travel to work by bicycle and boosting existing good levels of travel by foot through good design and associated infrastructure improvements. There could be scope to reduce dependence on car travel as a means of accessing work by enhancing the currently low levels of bus commuting in the Borough.

12.20 Rural and remote communities, particularly those on the east of the Isle of Sheppey, will benefit from an enhanced public transport offer to address issues surrounding lack of access to services and facilities which stem from access to service centres.

[55] ONS (2011), Census 2011: 'Method of Travel to Work 2011' (Table QS701EW)

Key issues and objectives

12.21 The following key issues emerge from the context baseline review:

- Around 80% of the population own a car or van and cars and vans represent by far the most popular travel to work method at 41.4%. The next most popular method of commuting is by foot at 7.2% of the population. Car dependence is therefore relatively high in the Borough.
- The Borough has good access to the rail network and is only around an hour from London St Pancras. Connections to other London termini are also strong as are links to key employment centres on the same rail corridor, particularly Dover.
- There is good connectivity with the Strategic Road Network via the M2, A2 and A249. However, north-south connections are weaker than east-west connections and recent growth is placing increasing pressure on key road junctions, particularly at Junctions 5 and 7 of the M2.
- Whilst the 2006 opening of the Sheppey Crossing provided additional capacity on road travel to the Isle of Sheppey some western communities on the island remain isolated and disconnected from the rest of the Borough.
- There is a clear transport corridor through the centre of the Borough along the alignment of the M2, A2 and railway line. Whilst this area is already home to services and infrastructure and is likely to provide some of the most sustainable locations for growth there is a risk of pushing the existing infrastructure over capacity without enhancement.
- There are opportunities to unlock further growth through infrastructure upgrades, particularly at key junctions on the M2.

12.22 In light of the key issues discussed above it is proposed that the SA framework should include the following objectives:

- Promote sustainable transport use, including supporting the creation of additional walking and cycling routes, and reduce the need to travel, particularly by private vehicle.
- Support the completion of existing transport objectives such as the Sittingbourne Northern Relief Road.

13. Water

Context

National

13.1 The NPPF is clear that plan making has a very important role to play in relation to water supply, particularly in terms of mitigating the increased pressure on water supply anticipated from climate change. The NPPF identifies water supply infrastructure as one of a number of key strategic priorities for local planning authorities and emphasises the importance of planning collaboratively with other authorities and external providers to meet need at a larger than local scale.

13.2 The Water Framework Directive (2000) requires a management plan to be prepared for water catchment areas to inform planning and help meet objectives and obligations in areas such as water efficiency and sustainable drainage.

13.3 The Water White Paper 2011[56] sets out the Government's vision for a more resilient water sector. It states the measures that will be taken to tackle issues such as poorly performing ecosystems, and the combined impacts of climate change and population growth on stressed water resources.

Regional

13.4 Water Resource Management Plans are prepared by water companies and aim to ensure that appropriate planning is undertaken so that supply continues to meet demand into the future, even under water stressed conditions. WRMPs cover 25 year planning periods to ensure that long term needs, trends and changes are considered appropriately. Water companies' areas of responsibility do not necessarily correspond with administrative geographies and Swale is served by two different water companies. The key regional documents therefore are the Southern Water WRMP 2015 – 2040[57] and the South East Water WRMP 2015 – 2040[58] though it is noted that both companies are currently preparing draft plans for the next WRMP period.

Local

13.5 The key message from the adopted Local Plan in relation to water supply is that the Borough is within an area of 'serious water stress' and that water resources in Swale will come under even further pressure from growth in the Borough. The Local Plan therefore aims to make efficient use of water resources to protect supply. Specific measures in relation to new development are proposed to deliver this aim, principally the requirement that new homes be designed to achieve a minimum water efficiency of 110 litres per person per day. Additionally, the Plan requires applicants to agree water supply with water companies prior to development commencement to ensure supply is protected.

13.6 A Water Infrastructure and Environmental Capacity Assessment was completed for the Council by consultants Scott Wilson in 2010 and forms part of the evidence base for the adopted Local Plan. Assesment of future capacity of the WwTWs is based on levels of growth proposed by the adopted Local Plan.[59]

[56] Defra (2011) Water for life (The Water White Paper) [online] available at <http://www.official-documents.gov.uk/document/cm82/8230/8230.pdf> [last accessed 09/02/18]
[57] Southern Water (2015) 'Water Resources Plan' [online], available at: https://www.southernwater.co.uk/water-resources-plan
[58] South East Water (2015) 'Final Water Resouces Management Plan – Technical Report' [online] available at: https://corporate.southeastwater.co.uk/about-us/our-plans/water-resources-management-plan-2014 [last accessed 29/03/18]
[59] Scott Wilson (2010), 'Water Infrastructure and Environmental Capacity Assessment' [online], available from: http://www.swale.gov.uk/assets/Planning-General/Planning-Policy/Topic-Paper/Swale-WCS-FINAL-for-web.pdf [accessed 24/05/18].

Baseline

Current baseline

13.7 The River Medway and The Swale represent the most significant watercourses in the Borough whilst a network of smaller rivers, creeks and streams provide a number of additional watercourses of varying degrees of significance. The low-lying Isle of Sheppey is extensively criss-crossed with minor watercourses and associated marshland.

13.8 The Borough's potable water is supplied by two different water companies, Southern Water and South East Water. For the purposes of Water Resource Management Planning (WRMP) the Borough lies within two separate Water Resource Zones (WRZs), Kent Medway WRZ which is supplied by Southern Water and Ashford WRZ which is supplied by South East Water

13.9 Wastewater and sewerage services are provided by Southern Water for the whole of the Borough. There are six WwTWs in the Borough at Eastchurch, Faversham, Motney Hill, Queenborough, Sittingbourne and Teynham.

13.10 The south of the Borough contains a number of separate groundwater Source Protection Zones (SPZs). SPZs have been defined by the Environment Agency in England and Wales to protect groundwater sources such as wells, boreholes and springs which provide a potable water abstraction sites. The zones show the risk of contamination from activities that might cause groundwater pollution in the area. There are 18 distinct areas categorised as Zone 1 (the Inner Protection Zone), defined by the EA by a "travel time of 50 days or less from any point within the zone at, or below, the water table". Three broader areas in the Borough are categorised as Zone 2 (the Outer Protection Zone), defined by "the 400 day travel time from a point below the water table" and there is a more limited area of Zone 3 (the Total Catchment) defined by "the total area needed to support abstraction or discharge".[60]

13.11 The overwhelming majority of the Borough is not designated as a Nitrate Vulnerable Zone though a very small area in the Borough's east clips the Great Stour NVZ for groundwater. The EU Nitrates Directive (91/676/EEC) requires member states to identify areas where groundwater has nitrate concentrations of more than 50 mg/l nitrate or is thought to be at risk of nitrate contamination if action is not taken. These areas are designated as Nitrate Vulnerable Zones (NVZs) and as such are recognised as being at risk from agricultural nitrate pollution. Member states are required to establish Action Programmes in order to reduce and prevent further nitrate contamination.

Future baseline

13.12 Water availability in the wider area may be affected by expected regional increases in population and by an increased occurrence of drought as a result of climate change. Poorly planned development could lead to unsustainable pressure on an already water-stressed region and potentially compromise the capacity of water companies to jointly plan for future need.

13.13 The Borough's SPZs are generally concentrated to the south of Borough and could be less likely to be affected by future development given the level of other constraints in this part of the Borough. However, capacity should be calculated to allow for connection by existing properties to new sewers particularly where development is in SPZ1 and 2 and existing cess pits or septic tanks pose a risk to water quality.

13.14 The future capacity of WwTWs tested in the 2010 Water Infrastructure and Environmental Capacity Assessment was based on growth proposed in the adopted Local Plan and therefore does not take account of any potential additional growth to be proposed in the Local Plan Review. The future baseline sees exceedances of Dry Weather Flow (DWF) at the WwTWs at

[60] Environment Agency (2015), 'Source Protection Zones [Merged]' [online], available at https://data.gov.uk/dataset/source-protection-zones-merged1 [last accessed 28/02/18].

Sittingbourne based on all four growth scenarios proposed in the adopted Local Plan. Queenborough WwTWs sees DWF exceedances under the highest growth scenario.

Key issues and objectives

13.15 The following key issues emerge from the context baseline review

- The Borough is part of a wider water-stressed region covering much of South East England. This means there is potential for demand for water to outstrip supply both now and in the future. It is generally acknowledged that climate change and overdevelopment can exacerbate water stress.
- The Borough is served by two water companies and falls within two different Water Resource Zones. The west of the Borough is within the Kent Medway Water Resource Zone which is supplied by Southern Water. The east of the Borough is within the Ashford Water Resource Zone which is supplied by South East Water.
- The baseline growth scenario of the adopted Local Plan is likely to see exceedances of DWF in at least one WwTWs in the Borough. Whilst this is not necessarily a showstopper constraint should the Local Plan review propose significantly higher growth again then a full Water Cycle Study may be necessary to fully assess the likely impact.

13.16 In light of the key issues discussed above it is proposed that the SA framework should include the following objectives:

- Promote sustainable forms of development which minimise water consumption and wastewater flows, including the use of innovative features and techniques.
- Maintain and enhance the quality of both surface and ground water resources where possible consistent with the aims of the Water Framework Directive.
- Promote efficient and sustainable use of natural resources.

14. Next steps

Subsequent stages for the SA process

14.1 Scoping is the first stage in a five-stage SA process:

- Scoping (NPPG Stage A)
- Appraising reasonable alternatives, with a view to informing preparation of the draft plan, and subsequent assessment of the draft plan (NPPG Stage B)
- Preparation of the SA Report with a view to informing consultation (NPPG Stage C)
- Consultation on the SA Report (NPPG Stage D)
- Publication of a statement at the time of plan adoption which 'tells the story' of plan-making/SA (NPPG Stage E)

14.2 Accordingly, the next stage will therefore involve the development and assessment of reasonable alternatives for the Local Plan. An SA Report will accompany a Local Plan Issues and Options Document for public consultation in due course.

Consultation on the scoping report

14.3 Public involvement through consultation is a key element of the SA process. At this scoping stage, the SEA Regulations require consultation with statutory consultation bodies but not full consultation with the public.

14.4 The statutory consultation bodies are the Environment Agency, Historic England and Natural England. The Scoping Report has been released to these three statutory consultees. consultees are invited to comment on the content of this Scoping Report, in particular the evidence base for the SA, the identified key issues and the proposed SA Framework.

14.5 All comments received on the Scoping Report will be reviewed and will influence the development of the SA where appropriate.

Appendix A – the SA Framework

SA Framework

Topic	SA objectives
Air Quality	Support the achievement of air quality improvement objectives within the Borough's 5 designated AQMAs. Seek to minimise air pollution more generally, such as through supporting or enabling the use of low emission technologies and encouraging sustainable modes of transport such as walking and cycling.
Biodiversity	Minimise, and avoid where possible, impacts to biodiversity, both within and beyond designated and non-designated sites of international, national or local significance. Achieve biodiversity net gain including through the long term enhancement and creation of well-connected, functional habitats.
Climate change mitigation	Minimise per capita greenhouse gas emissions from transport, industry and the built environment. Deliver Sustainable Drainage Systems and other measure with a view to future proofing and building climate change resilience Deliver high standards of energy efficiency and water efficiency in new development.
Communities	Support good access to existing and planned community infrastructure for new and existing residents. Promote and support healthy communities, including through increasing access to green infrastructure and open space.
Economy and employment	Support the achievement of economic growth objectives, including in targeted growth sectors and established employment sectors. Support a strong, diverse and resilient economy that provides opportunities for all. Support and enhance the vitality of the Borough's town centres including through the identification of further regeneration opportunities where appropriate. Support provision of further education facilities in the Borough where practicable.
Flood risk	Avoid and mitigate flood risk by directing development away from the areas of the Borough at the highest risk of flooding. Support the priorities identified in the Medway Estuary and Swale Shoreline Management Plan and the Isle of Grain to South Foreland Shoreline Management Plan.
Heritage	Conserve and enhance heritage assets and contribute to the maintenance of historic character through design, layout and setting of new development.

Housing	Support timely delivery of market housing and affordable housing. Promote an appropriate mix of housing types and tenures. Cater for existing and future residents' needs as well as the needs of different groups in the community.
Land	Promote the efficient and sustainable use of natural resources, including supporting development which avoids the best and most versatile agricultural land.
Landscape	Protect and enhance the character and quality of the Borough's landscapes and townscapes through appropriate design and layout of new development. Protect and enhance the Kent Downs AONB where possible. Preserve important open gaps between settlements.
Transport	Promote sustainable transport use, including supporting the creation of additional walking and cycling routes, and reduce the need to travel, particularly by private vehicle. Support the completion of existing transport objectives such as the Sittingbourne Northern Relief Road.
Water	Promote sustainable forms of development which minimise water consumption and wastewater flows. Maintain and enhance the quality of both surface and ground water resources where possible consistent with the aims of the Water Framework Directive. Promote efficient and sustainable use of natural resources.

Local Plan Panel Meeting	Agenda Item: 8
Meeting Date	20 September 2018
Report Title	For Information: New Garden Communities Prospectus Update
Cabinet Member	Cllr Gerry Lewin, Cabinet Member for Planning
SMT Lead	Emma Wiggins
Head of Service	James Freeman
Lead Officer	Gill Harris
Key Decision	No
Classification	Open
Recommendations	None

1 Purpose of Report and Executive Summary

1.1 This report updates the Panel on work connected with the publication of the New Garden Communities Prospectus by the Council in April 2018.

2 Background

2.1 Encouraged by Government, authorities are increasingly exploring the potential of new communities as a means to address housing need and other objectives.

2.2 Following consideration of the Peter Brett Associates report 'Choices for Housing Growth' in February 2018, the Panel agreed publication of a New Garden Communities Prospectus as a means to determine the degree of interest in building new garden communities in Swale. Sitting alongside the Local Plan review process, if taken forward, they would be considered as part of the Issues and Options stage of the Local Plan.

2.3 The Prospectus was launched on 27 April 2018 and set out the Council's vision and design expectations for new communities of 2,500 dwellings and above. The launch was followed by a workshop with developers and landowners.

2.4 The Prospectus set out a two stage submission process. The first required an expression of interest to be made; with officers then raising a number of matters with each promotor that they believed should be the focus of particular attention within the final submissions. The second stage was the submission of detailed proposals themselves on 3 August 2018.

2.5 Four detailed submissions were made by the deadline (see location plans in Appendix 1):

1) NS1: Land south-east Sittingbourne: 628 ha[1], circa 11,500 homes (inc. 10% affordable housing), 120,000 sq. m commercial space, community uses (local retail space within 4 district centres), GP surgeries, education (up to 4 primary schools, secondary school, possible FE), sport and leisure, natural and semi-natural open space and amenity greenspace. New motorway junction and M2/A2 link road to be provided.

2) NS3 Land at Bobbing: 208 ha, circa 2,500 homes (up to 40% affordable housing), 100 ha of open space, community facilities including primary school, health centre, local centre, village hall and sports pitches, 3 ha of employment floorspace, stopping up/re-alignment of Sheppey Way.

3) NS4 Land at south-east Faversham: 131 ha, circa 2,500 homes (inc. aim for 40% affordable housing), up to 20,000 sq. m of commercial space. Community uses (4 local centres, health centre), education (primary school), sport and leisure (inc. possible relocation of cricket club and football ground), network of habitats, spaces.

4) NS5 Land at Ashford Road, North Street, Faversham: 319 ha, circa 5,000 homes (a 'strong emphasis' on affordable housing). No precise details, but indicated as additionally included employment provision, a High Street for retail/mixed use and market hall, primary and secondary school, community uses, allotments, community orchard, playing fields and areas, together with open space and woodland. Re-alignment of the A251 through the site is indicated, together with improvements at J6.

2.6 NS2 Land at Rushenden Marshes was withdrawn.

2.7 Other submissions were made which did not meet the Prospectus minimum dwelling size. These included a number of small sites at Neames Forstal/Selling and two sites, adjacent to NS4 at Faversham, comprising some 42 ha to the north of the A2 (in separate land ownerships). All the promotors have been advised that their sites will not be further considered via the Prospectus process, but will be assessed as part of the Council's Strategic Housing Land Availability Assessment process. In the case of the sites adjacent NS4 at Faversham, the promotors have also been advised that should a future decision be taken by the Council to allocate substantial new provision for the Local Plan review in this part of Faversham, consideration of all the sites would be undertaken together. As a result, it is understood that all the parties in this area have had at least had initial discussions about future joint working should that become necessary.

2.8 The process for considering the four submission is now as follows:

[1] Land north of the A2 is not currently submitted as part of the Prospectus process. However, the promotor has been advised that it will be considered by SBC, given the connections with the proposed Sittingbourne Northern Relief Road. The promotor has indicated their intention, in due course, to amend their submissions to formally include the area.

- Current and on-going: Initial independent assessment by consultant of proposals against Prospectus expectations and further requests for information from officers.
- September 2018: Officer meetings with scheme promotors.
- 16 October 2018: All-Member presentations and Q&A session with scheme promotors, together with consultant's draft independent assessment. Full submissions to be available for Members ahead of session.
- 31 January 2019: Local Plan Panel to receive final consultant's independent assessment and to resolve whether new communities should be considered as spatial alternatives for later consultation, as part of the Issues and Options stage of the Local Plan process, i.e. that they are one of a number of potential alternatives for distributing future development levels across the Borough.
- June 2019: Local Plan Panel agreement and steer on all potential spatial alternatives.
- September 2019: Local Plan Panel to agree Issues and Options (inc. the spatial alternatives) consultation document and indicative draft preferred option.
- Then as per timetable set out in Local Development Scheme.

2.9 Officers are also exploring the possibility of submitting a bid for financial support from the Government's New Communities Prospectus. If this is progressed, it is likely to be based on providing technical and other 'knowhow' based on the overall process that the Council is engaged in, rather than site specifics. Members will be kept up to date on this.

2.10 A Member tour of new community locations is also being organised.

3 Proposals

3.1 As an information report, Members are asked to note the report.

4 Alternative Options

4.1 As an information report, there are no alternative options.

5 Consultation Undertaken or Proposed

5.1 Consultation on broad issues relating to the principle and delivery of new garden communities were canvassed via the *Looking Ahead* consultation in June 2018.

6 Implications

Issue	Implications
Corporate Plan	Supports the Council's corporate priorities for a borough and a community to be proud of.

Financial, Resource and Property	Within Local Plan budget.
Legal and Statutory	None anticipated at this time.
Crime and Disorder	None anticipated at this time.
Sustainability	The Local Plan process will be subject to Sustainability Appraisal.
Health and Wellbeing	None at this time.
Risk Management and Health and Safety	None at this time.
Equality and Diversity	The Local Plan process will be subject to a Community Impact Assessments at appropriate points.

7 Appendices

7.1 Site locations plans of submitted new community proposals.

8 Background Papers

- New Garden Communities Prospectus April 2018.
- Detailed Prospectus Submissions (In Member's Room)

Appendix 1 Submitted new community proposals

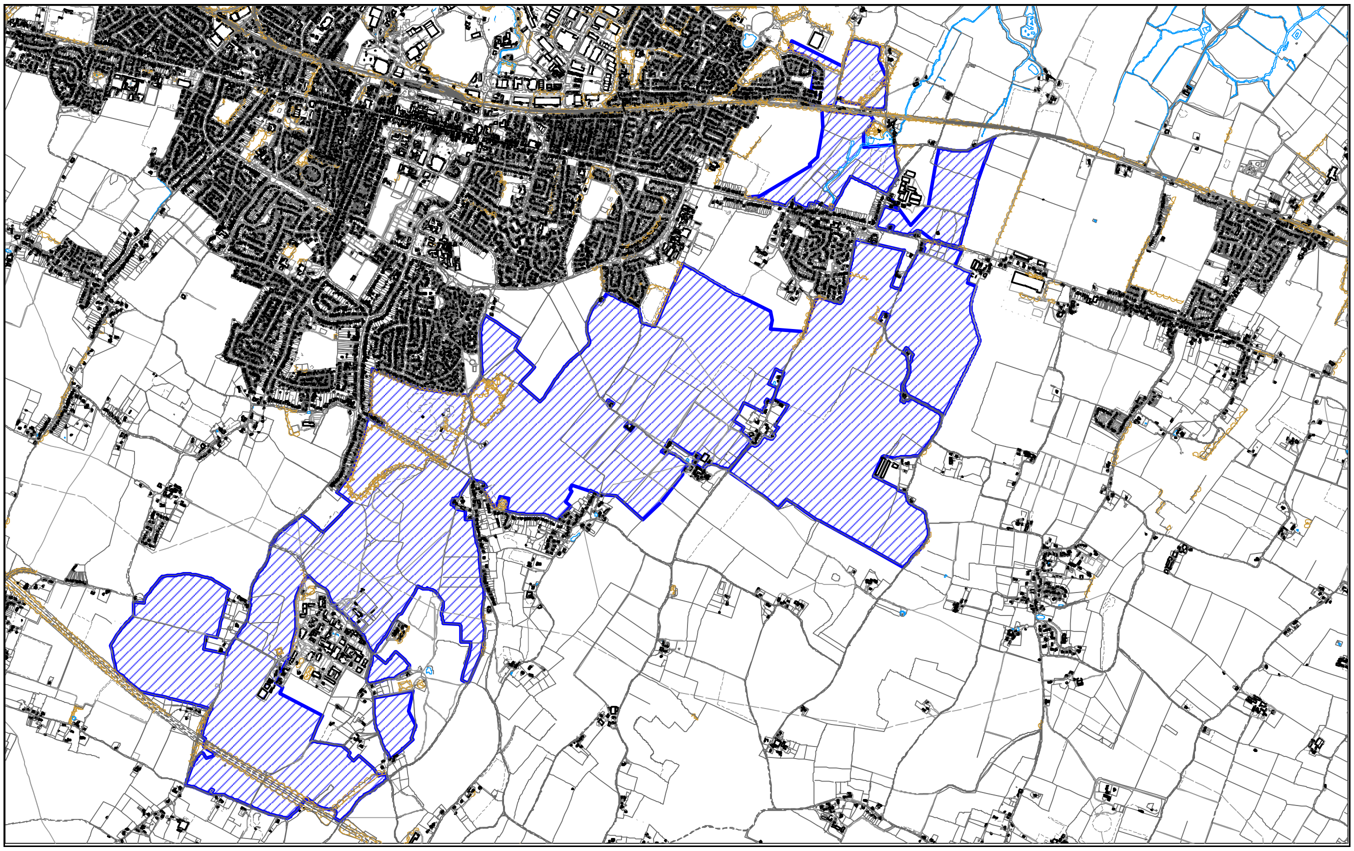


Figure 1 NS1 Land at south east Sittingbourne

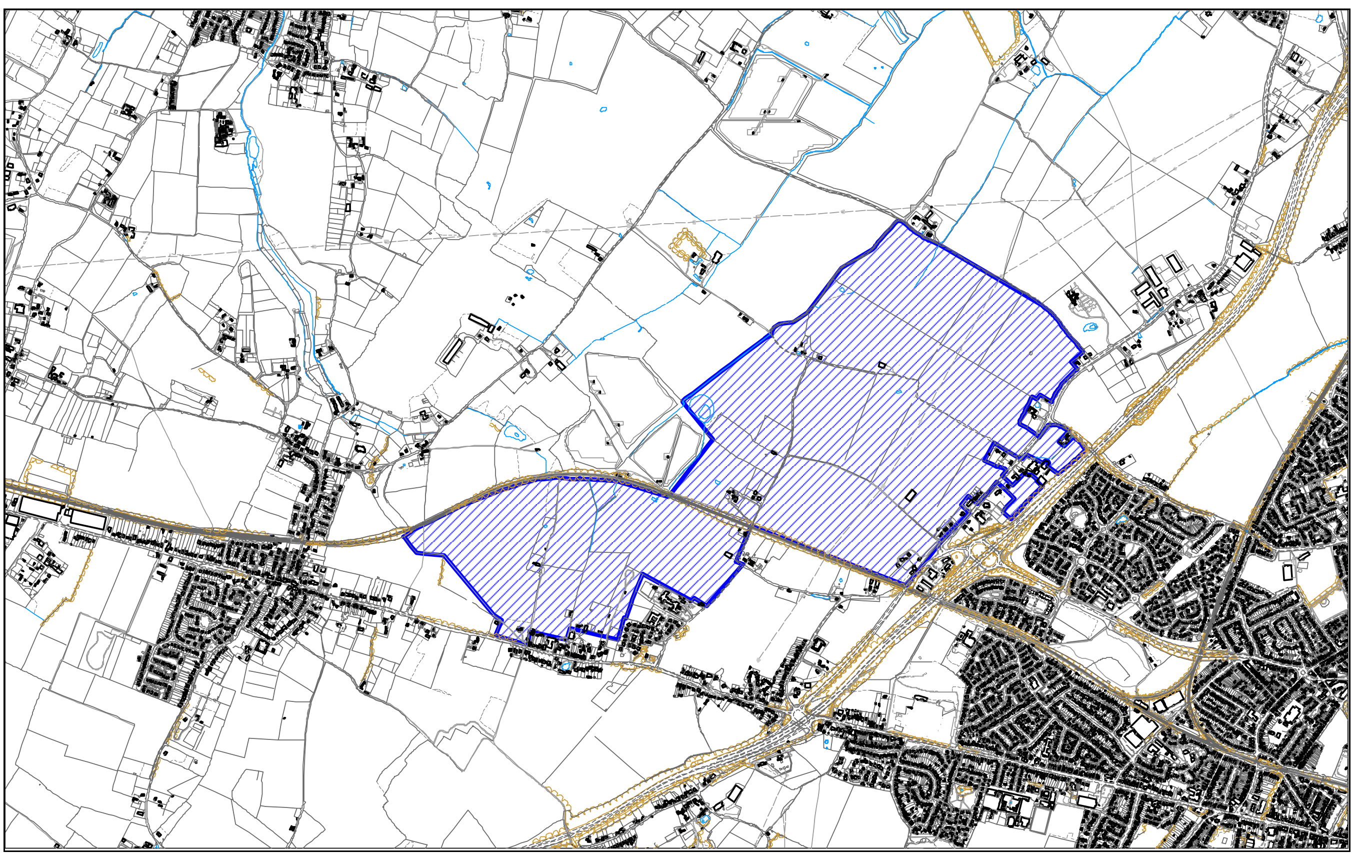


Figure 2 NS3 Land at Bobbing

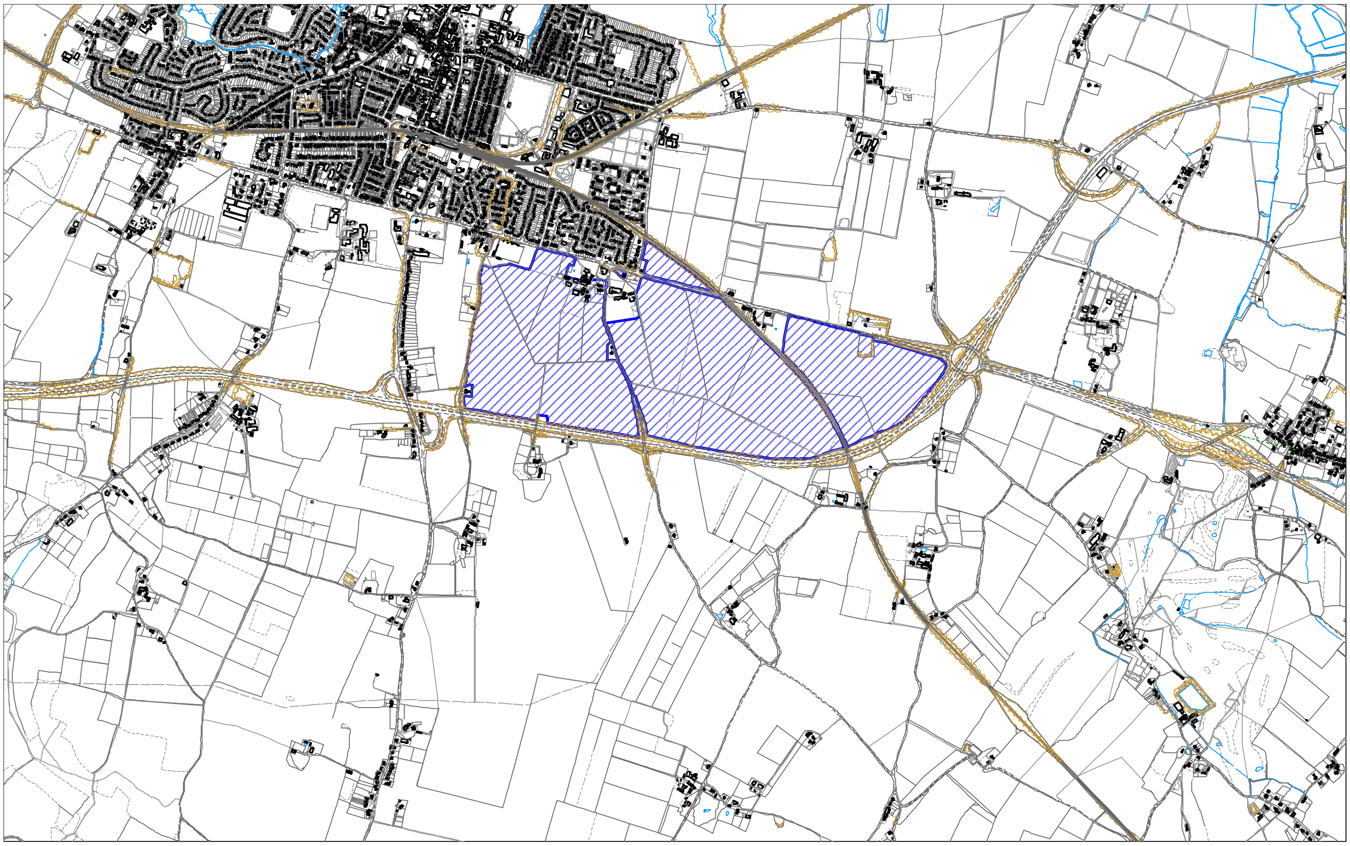


Figure 3 NS4 Land at south east Faversham

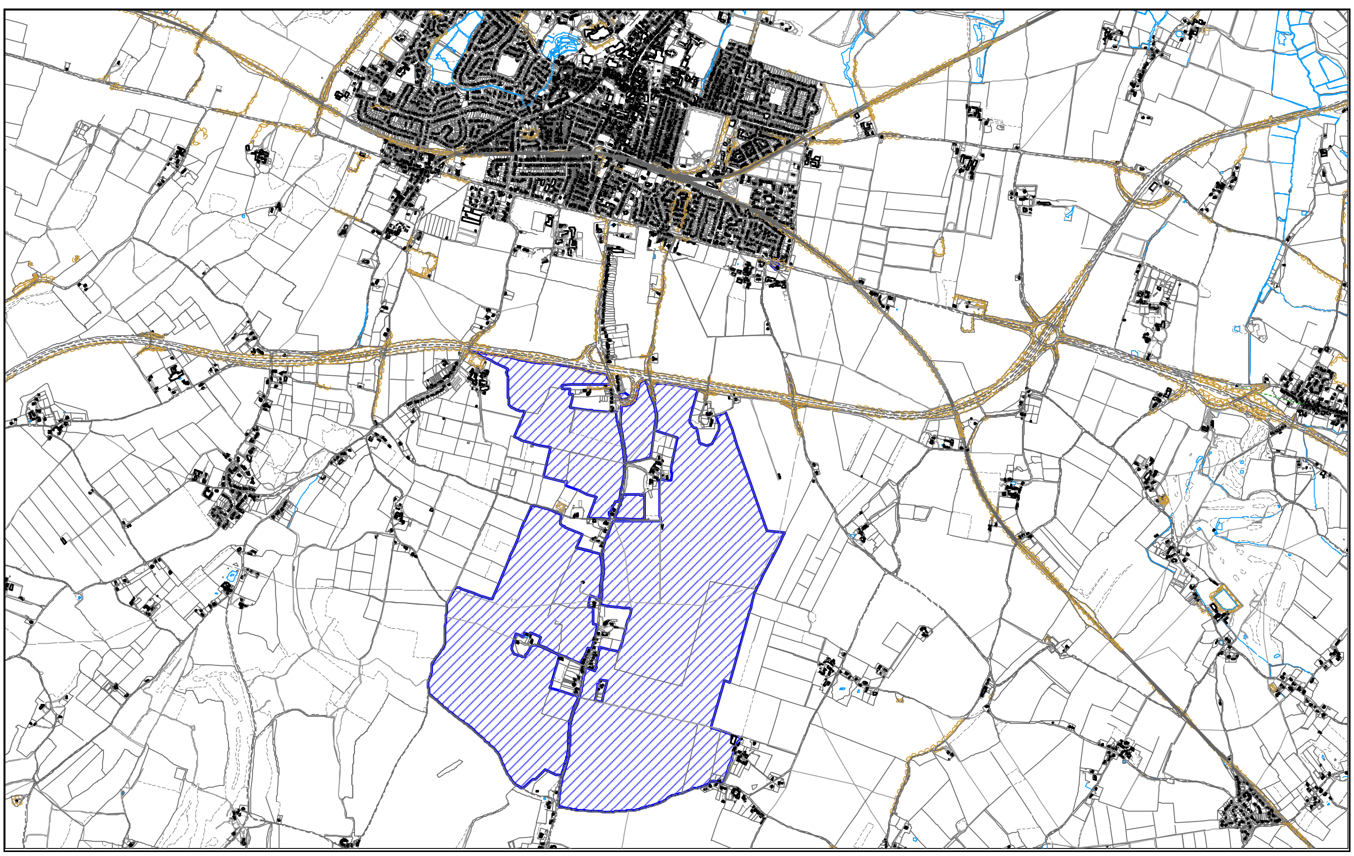


Figure 4 NS5 Land at Ashford Road, North Street, Faversham