

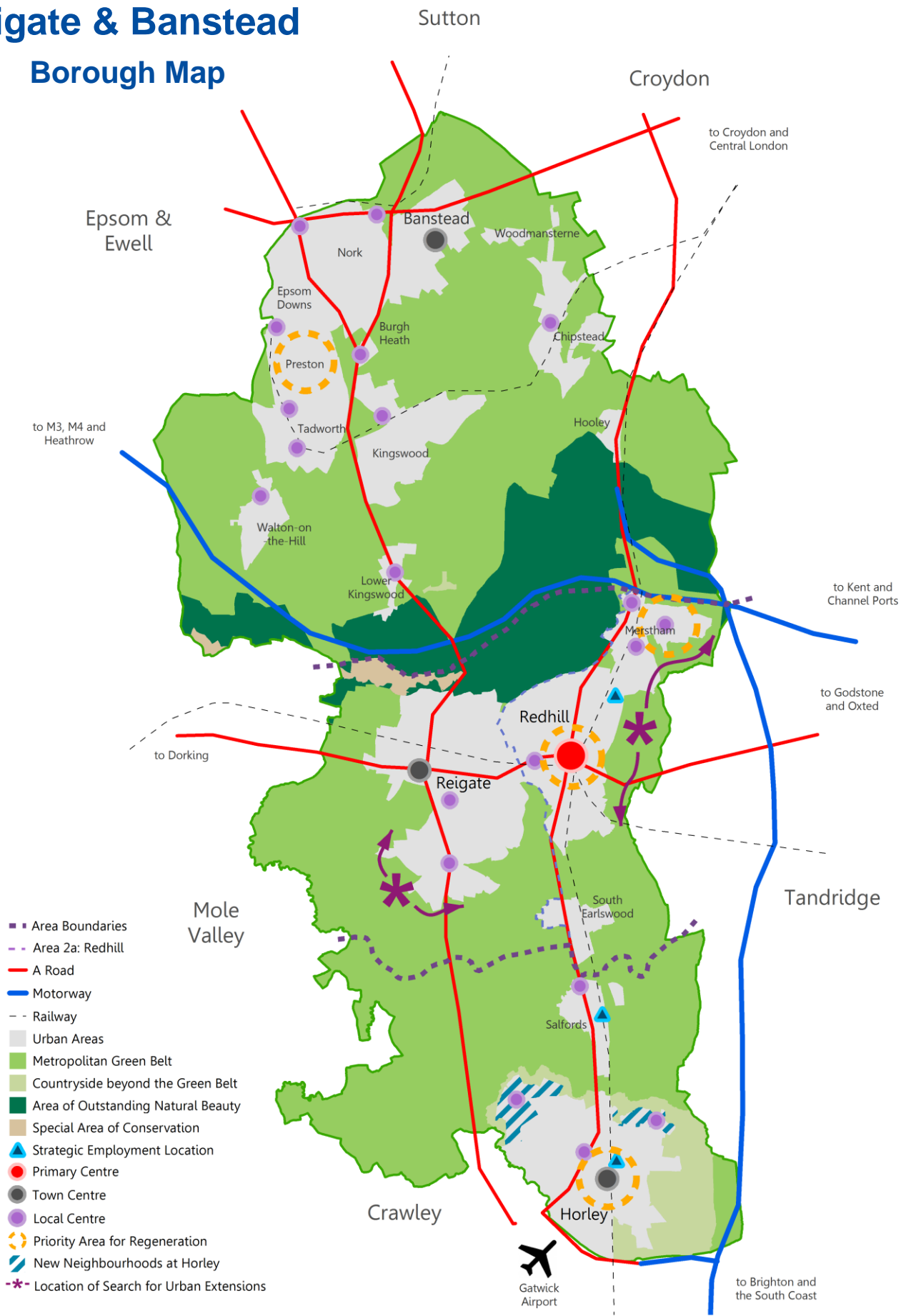


Industrial Estates Monitor

March 2013

Reigate & Banstead

Borough Map



Industrial Estates Monitor

March 2013

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Please Note:

The information contained in this document is only a record of the observed current uses occupying individual premises within the Industrial Estates, as of March 2013. It does not constitute a record of the Lawful Uses of each property under the terms of Sections 191 and 192 of the Town and Country Planning Act 1990 (as amended). For further information on Lawful Uses, please contact Building & Development Services.

While every care has been taken to ensure that the information in this Monitor is accurate, the Borough Council accepts no responsibility for any errors or omissions. We would be grateful if our attention was drawn to any inaccuracies so that they might be corrected. Similarly, any suggestions that would make the information more useful would be gratefully received.

Introduction

The borough's industrial estates are areas specifically designated and reserved in order to maintain a sufficient stock of land primarily for employment generating industrial, storage and distribution uses. The nine main industrial estates are:

- | | |
|----------------------|--|
| Banstead Area | 1. Pitwood Park Industrial Estate <i>including</i> Epsom Downs Metro Centre |
| Reigate Area | 2. Albert Road North Industrial Estate |
| Redhill Area | 3. Holmethorpe Industrial Estate <i>including</i> Foxboro Park |
| | 4. Wells Place Industrial Estate |
| | 5. Kingsfield Business Centre |
| | 6. Reading Arch Road Industrial Estate |
| Horley Area | 7. Perrywood Business Park |
| | 8. Salfords Industrial Estate <i>including</i> IO Centre, Orchard Business Centre, Astra Business Centre & Redhill Distribution Centre |
| | 9. Balcombe Road Industrial Area <i>comprising</i> Gatwick Metro Centre & Bridge Industrial Estate |

The purpose of monitoring industrial estates is to:

- Improve knowledge and intelligence of local businesses to support future economic development;
- Analyse use trends and assess the on-going suitability and viability of these areas for different types of employment provision;
- Analyse vacancy and market activity within the industrial estates as a further barometer of economic performance;
- Monitor the effectiveness of local policies the borough's local plan documents and provide an up-to-date evidence base to support decision-making on planning application

Full schedules of occupiers are available from the Planning Policy Team on 01737 276000 or by emailing LDF@reigate-banstead.gov.uk.

Future Policy Developments

The Borough Local Plan 2005, including its saved policies, is in the process of being replaced by new local planning documents. The Council submitted its Core Strategy in May 2012. Following feedback from the Planning Inspector, the Council carried out some additional work which resulted in amendments to the document. The revised documents were submitted to the Inspector in March 2013 and examination hearing sessions have been scheduled in May 2013.

The Core Strategy sets the overarching strategic approach to employment development in the borough. Detailed policies and employment land allocations will be set out in the emerging Development Management Policies DPD. Targets have been set for specific areas over the plan period which will be monitored to assess their performance.

Relevant Local Policies and Indicators

Policy	Monitoring Target
EM1/ EM1A	Proposals for business, industrial and storage and distribution uses will generally only be permitted in employment policy areas set out on the proposals map. Restrict loss of employment land in these areas to maintain/ promote economic growth in Surrey.
EM2	Generally permit proposals for redevelopment, extension or change of use for business, industrial and storage and distribution uses subject to certain criteria being met.

Overall Trends – Key Messages

UK Trends

According to the National Industrial & Distribution Market 2012 report, take up has remained relatively buoyant within the industrial and distribution market particularly across the south east, despite the ongoing economic uncertainty faced in the UK. Recent figures show that take-up of larger units more than doubled in the South East between 2010 and 2011, most of which was in the larger distribution sector where take up was almost three times the figure in 2010 at 2.9m sq/ft. However increased take-up has led to an acute shortage of suitable large units available in the South East. During the second half of 2012, the South East region saw activity within the small industrial market decline as a result of increased economic difficulties/ uncertainty in the UK. This has had a negative impact in occupier take up across the region. Subsequently availability of small industrial units has increased.

Borough Trends

The borough's industrial estates contain around 400 business premises and provide over 263,000sqm of floorspace. Taken together, the estates incorporate about 38% of all employment floorspace in the borough. Over the past year there has been an increase in vacancy rates across most of these employment areas, which is largely down to the on-going economic uncertainty.

- **Vacancies** – The total number of vacant units currently stands at 67 (17%), which is above the target set out in the Core Strategy monitoring framework of 15% (long term average) in line with the current economic climate. There continues to be wide variation in performance: for the second year running, both Holmethorpe and Salfords continue to have the highest number of vacancies whilst Kingsfield has no vacant units. Vacant floorspace stands at 31,795sqm (12.1%)
- **New Occupiers** – A total of 20 new occupiers moved into the Industrial Estates in the last year, of which 9 occupiers took over previously vacant units, whilst 9 moved into previously occupied units. A further 2 new occupiers moved into 2 recently completed, purpose built industrial units on Holmethorpe Industrial Estate. Both Holmethorpe and Salfords had the highest take up at 3 units. Salfords also has one new occupier (Surrey Police) currently fitting out in a previously vacant unit, whilst Pitwood Park had no new occupiers move in. Over the past year the total take-up was 10,133sqm whilst 14,235sqm became vacant across the 9 estates, resulting in a net loss of 4,102sqm.
- **Land Use Trends** – As has been the case since 2006, B8 (warehouse/distribution) is the dominant use across the industrial estates, accounting for 30% of all units and almost 37% of floorspace. Over the last decade, B8 use has continued to increase whilst B1(C)/ B2 use has continued to fall and now accounts for 24% of the total. The decline has stabilised in the last 4 years. There has been little change in B1 (A) office use which has by and large stayed at around 15%. This is consistent with the 2000 figure, despite there being a sharp increase up to 24% in 2006, prior to the recession. When combined, traditional employment uses (B1, B2 and B8) account for almost three quarters of both units and floorspace across the nine estates.
- **Land Use Classes** – The borough's 9 industrial estates combined are made up of 8 different use classes. Once again the predominant use is B8 (warehouse and distribution) making up 30% of all units which is equal to around 37% of the total floorspace. When combined together, the most common employment uses (B1, B2 and B8) account for more than three quarters of all the estates units and floorspace.

- **Major New Developments** –. In the last year, 2 new industrial units have been completed on Holmethorpe, providing a net-gain of 775sqm additional B1/B8 floorspace (10/00076/F). Both units are now occupied. There are also a number of extant planning permissions proposing change of use, extensions and new developments which could potentially provide a further 11,000sqm of net additional employment floorspace. There has been a slight increase in development interest across the borough's industrial estates, as evidenced by permissions; however, the actual delivery of new floorspace remains severely subdued.

Breakdown of Use Classes

Table 1 Breakdown of Use Classes in the Industrial Estates (Number of Units/Premises)

Industrial Estate	A1	B1(A)	B1(B)	B1(C)	B2	B8	D1	D2	SG	Vacant	Total
Pitwood Park	0	4	4	1	0	3	0	0	0	2	14
Albert Road North	3	5	4	4	0	11	0	1	0	5	33
Holmethorpe/Foxboro	9	18	6	33	15	34	0	2	5	34	156
Wells Place	1	0	1	1	0	5	0	0	0	1	9
Kingsfield Business Centre	0	5	0	3	0	7	0	0	1	0	16
Reading Arch Road	2	1	0	0	3	0	0	0	2	1	9
Perrywood Business Park	0	3	4	6	1	3	0	0	0	4	21
Salfords	3	4	7	11	4	43	0	1	3	19	95
Balcombe Road	0	17	1	13	2	15	0	0	1	1	50
Total	18	57	27	72	25	121	0	4	12	67	403
Percentage	4.5	14.1	6.7	17.9	6.2	30.0	0.0	1.0	3.0	16.6	

Table 2 Breakdown of Use Classes in the Industrial Estates (Floorspace sqm)

Industrial Estate	A1	B1(A)	B1(B)	B1(C)	B2	B8	D1	D2	SG	Vacant	Total
Pitwood Park	0	745	2,340	120	0	460	0	0	0	965	4,630
Albert Road North	255	270	2,745	2,715	0	5,490	0	470	0	990	12,935
Holmethorpe/Foxboro	4480	5,255	6,580	15,134	8,955	24,480	0	400	2,880	14,240	82,404
Wells Place	2,210	0	3,070	3,665	0	15,240	0	0	0	2,405	26,590
Kingsfield Business Centre	0	1,420	0	3,675	0	2,835	0	0	275	0	8,205
Reading Arch Road	580	300	0	0	895	0	0	0	2,270	115	4,160
Perrywood Business Park	0	8,885	3,885	6,415	105	2,305	0	0	0	3,095	24,690
Salfords	3,315	4,635	10,755	3,458	1,230	40,533	0	420	8,185	9,295	81,826
Balcombe Road	0	3,890	375	6,095	240	5,060	0	0	1,935	690	18,285
Total	10,840	25,400	29,750	41,277	11,425	96,403	0	1,290	15,545	31,795	263,725
Percentage	4.1	9.6	11.3	15.7	4.3	36.5	0.0	0.5	5.9	12.1	

Vacancies & New Occupiers

Vacancy Trend

In the last 12 months the total number of vacant premises across the boroughs 9 industrial estates has increased sharply up from 56 to 67. Correspondingly, the vacancy rate has increased to 16.6%, above pre-recession performance and the Core Strategy monitoring target of 15% (long term average). As can be seen from figure 1 below, the Core Strategy target has been missed since 2008, at the start of the financial crisis. The current vacancy rate figure reflects the on-going economic uncertainty. Vacant floorspace across the 9 estates has also risen sharply in the past year and currently stands at 31,795sqm, equating to 12.1% of the total. Despite a slight increase from last years figure of 10.3%, the current figure is still below the 2011 figure of 14.5%.

Figure 1 Long Term Vacancy Trend - Units (2000 - 2013)

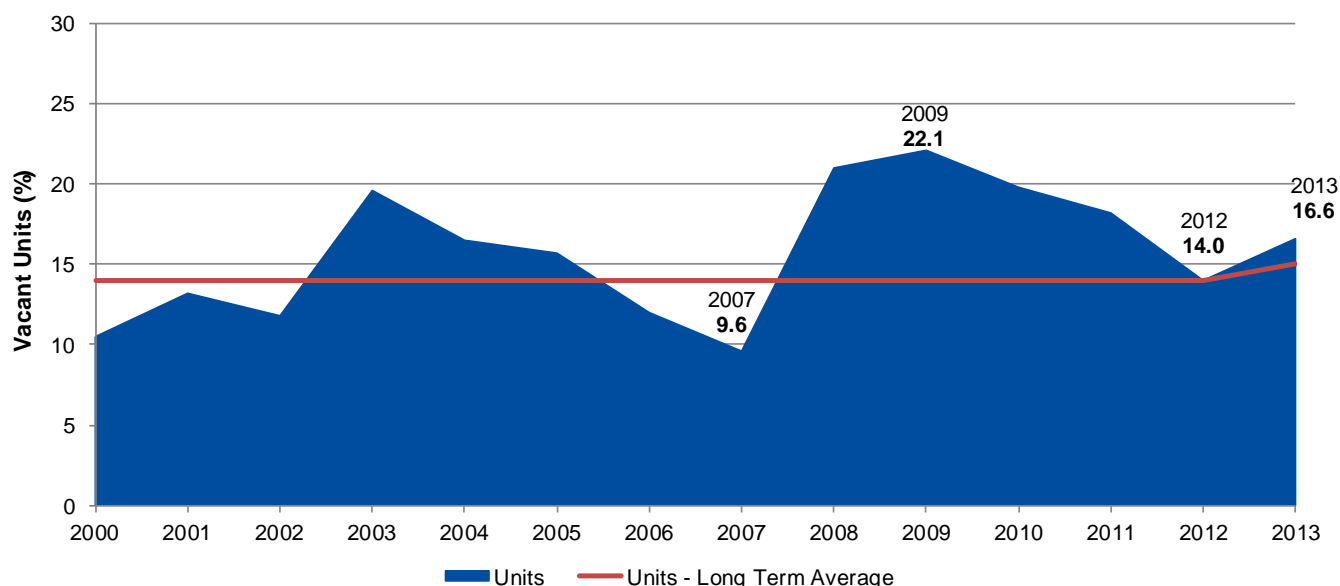


Table 3 below shows the longer term vacancy trend for each of the individual estates. The figures demonstrate the continued strong performance of Kingsfield estate which has had no vacant units for the last 6 years. Out of all the nine estates, Reading Arch Road was the only one to see a drop in vacancies over the past year, with the percentage falling by half. All the remaining estates have seen an increase in their vacancy rates over the past year which is not surprising given the ongoing uncertainty faced in the current economic market.

More than half of the borough's industrial estates are below the borough's current 15% long term average vacancy target, with Kingsfield estate once again having no vacancies.

Table 3 Individual Estate Vacancy Trends 2001 - 2013

	2001	2007	2008	2009	2010	2011	2012	2013
Pitwood Park	6.3	11.8	11.8	7.7	7.7	7.7	7.7	14.3
Albert Road North	6.3	16.7	25.0	18.2	15.2	13.3	13.3	15.2
Holmethorpe	18.3	11.4	23.0	23.0	21.7	20.4	16.2	21.8
Wells Place	0.0	0.0	11.1	0.0	11.1	11.1	11.1	11.1
Kingsfield	7.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Reading Arch Road	9.0	7.7	7.7	23.1	15.4	22.2	22.2	11.1
Salfords	18.0	2.0	19.4	36.7	32.0	28.7	20.2	20.0
Perrywood	9.0	20.0	25.0	5.0	9.5	13.6	9.5	19.0
Balcombe Road	9.0	7.3	26.9	15.1	9.4	6.0	4.8	2.0
Borough-wide	13.2	9.6	21.0	22.1	19.8	18.2	14.0	16.6

Once again the amount of vacant floorspace varies across each of the individual industrial estates. Perhaps unsurprisingly, that the boroughs two largest estates – Holmethorpe (14,240sqm) and Salfords (9,295 sqm) both have the highest amount of vacant floorspace. Combined these two estates represent nearly three quarters of the total vacant floorspace. Conversely, Kingsfield continues to have no vacant floorspace. Pitwood Park industrial estate currently has the highest floorspace vacancy rate at 21%; however, permission was recently granted to use one of the large vacant units as a gym

New Occupiers

Compared to 2012, the number of new occupiers moving into the borough’s industrial estates fell sharply from 37 to 20. This change further highlights the current economic uncertainty.

Table 4 New Occupiers and Take-Up – Units and Floorspace

	Take-Up – Previously:		New Development	New Vacancies
	Vacant	Occupied		
Pitwood Park	0 (0sqm)	0 (0sqm)	0 (0sqm)	1 (225sqm)
Albert Road North	1 (1,090sqm)	0 (0sqm)	0 (0sqm)	2 (160sqm)
Holmethorpe	3 (840sqm)	4 (1,255sqm)	2 (775sqm)	12 (5,765sqm)
Wells Place	1 (2,500sqm)	0 (0sqm)	0 (0sqm)	1 (2,405sqm)
Kingsfield	0 (0sqm)	0 (0sqm)	0 (0sqm)	0 (0sqm)
Reading Arch Road	1 (190sqm)	0 (0sqm)	0 (0sqm)	0 (0sqm)
Salfords	2 (585sqm)	3 (1,243sqm)	0 (0sqm)	5 (3,760sqm)
Perrywood	0 (0sqm)	1 (1,035sqm)	0 (0sqm)	2 (1,640sqm)
Balcombe Road	1 (180sqm)	1 (440sqm)	0 (0sqm)	1 (280sqm)
Total	9 (5,385sqm)	9 (3,973sqm)	2 (775sqm)	25 (14,235sqm)

Of the 18 new occupiers, 9 moved into premises that were previously vacant, whilst 9 took over previously occupied units. A further 2 new occupiers moved into 2 newly completed industrial units at 12 Trowers Way. This has brought more than 10,100sqm of vacant floorspace back into use, which is considerably lower than the previous year’s figure of 15,800sqm. Against this 25 units totalling 14,235sqm have become vacant in the last 12 months, a sharp increase from 7 new vacancies recorded in 2011.

Development Activity

There has been some development in the industrial estates over the past 12 months, most noticeably is the recently completed and now occupied purpose built industrial units at 12 Trowers Way (10/00076/F), providing an additional 775sqm of commercial and employment floorspace.

A number of planning applications and permissions remain extant, further highlighting there is still ongoing interest and potential planning activity for proposed new developments and changes of use on the borough’s industrial estates. This could be an indication of an improvement in developer/ market sentiment.

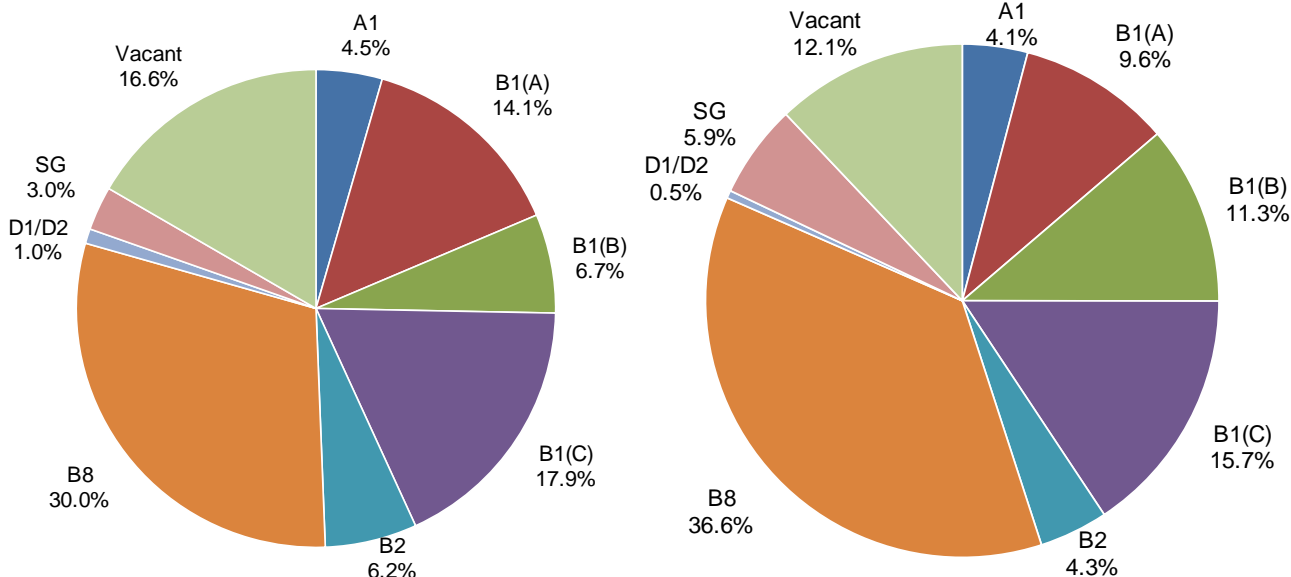
At present, extant planning permissions could potentially deliver around 11,000sqm of net additional employment floorspace across the borough’s 9 industrial estates.

Use Classes

Use Class Composition

In total, the main employment uses (B1, B2 & B8) account for almost 75% of all units across the nine industrial estates. The single most common use is still B8 warehouse & distribution which accounts for almost 30% of all units, followed by B1(C) light industrial use at 18%. B8 use also dominates in terms of floorspace accounting for over 36% of the total. This is perhaps unsurprising as the nature of warehouse/distribution businesses means they tend to require larger premises. Overall, the main employment uses (B1, B2 & B8) combined account for 77% of the total floorspace

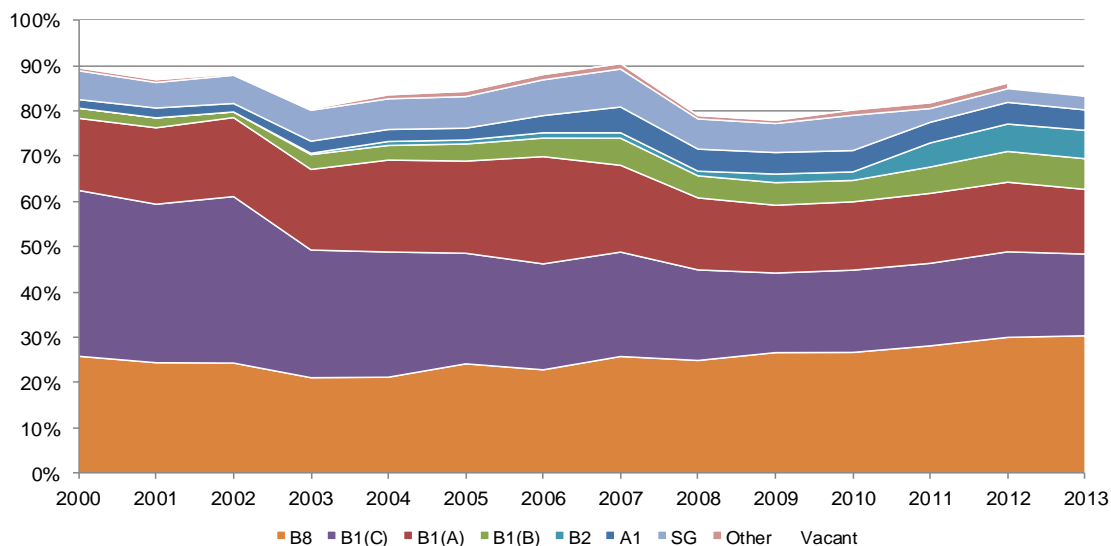
Figure 2 Use Class Breakdown (Left – Units; Right – Floorspace)



Use Classes Trends

Figure 3 below shows the long term use class trend across the combined industrial estates. The growth in - and move towards - warehouse & distribution type uses is apparent with the proportion of such uses rising from around 25% in 2000 to a current level of 29%. Against this there has been a noticeable decline in light industrial B1(C) uses over the past decade or so, down from 37% of units in 2000 to 18% this year. There has been relatively little change in the proportion of office uses over the last 5 years; however, prior to this and before the recession hit, the proportion of units in office use had risen steadily to a higher of 24% in 2006

Figure 3 Use Class Trends 2000 – 2013



Individual Estate Analysis

Pitwood Park Industrial Estate, Tadworth



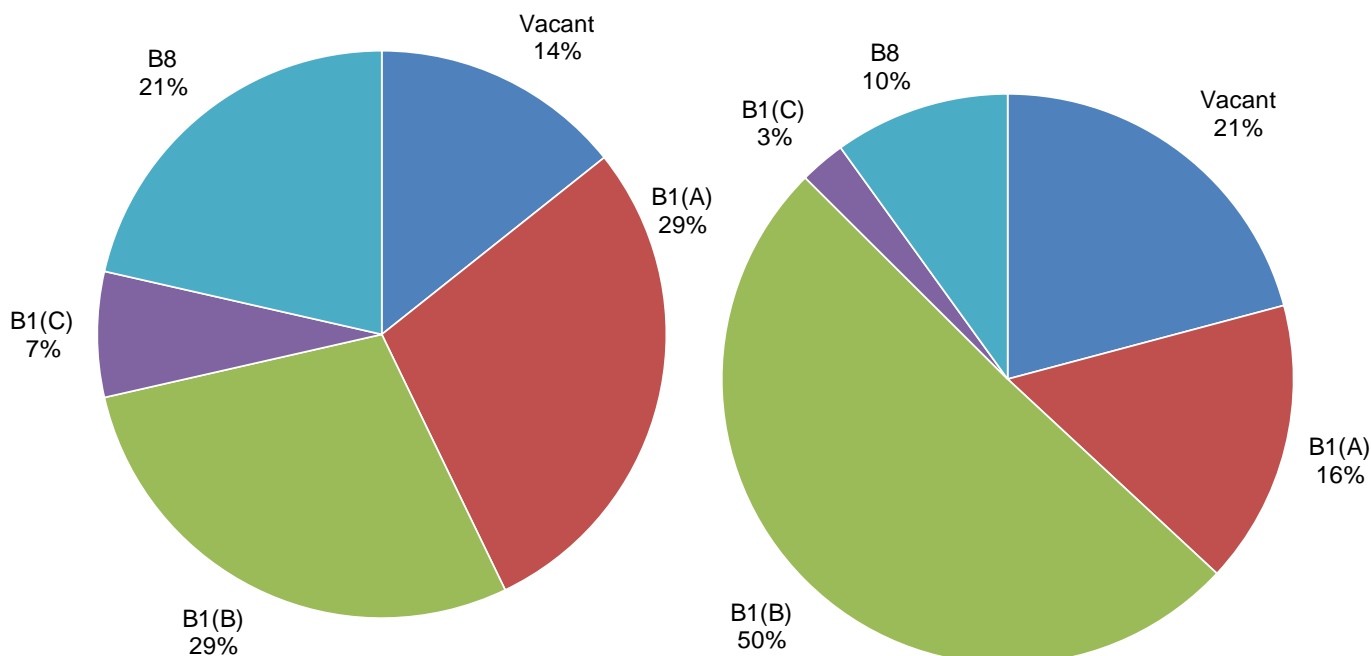
Vacancies & New Occupiers

Over the past year there has been a slight increase in the number of vacant units up from 1 to 2. One of the units - the former Grind All unit – has been vacant for a number of years but was recently granted permission to change to a gymnasium.

	Total	Vacant	% Vacant
Units	14	2	14
Floorspace	4,630	965	21

No new occupiers moved into the industrial estate in the last 12 months.

Use Classes



Pitwood Park is predominately made up of B1(A) and B1(B) use, with each representing 29% of the total units found within the estate. Over the past year there has been a drop in B1(A) use (29%) and floorspace (16%) due to one unit becoming vacant which was previously in B1(A) use and occupied by AM Environmental Services. As a result the total number of vacant units has doubled in the last 12 months leading to an increase in vacant floorspace which currently stands at 21% (965sqm). Once again half of the estates floorspace is in B1(B) use, a figure which is slightly skewed by the large laboratory units which is occupied by Ashlands. Given the location of the estate, it is perhaps unsurprising that the proportion of industrial (B1(C)) and warehouse (B8) uses are relatively limited, accounting for only 28% of all units and 13% of floorspace.

Planning and Development Activity

There is currently one extant planning permission for a change of use (12/01561/CU) from B2 to D2 use to provide a gymnastics training facility at 4 & 4A previously occupied by Grind All Precision engineering, which have been vacant for a number of years now.

Albert Road North Industrial Estate, Reigate



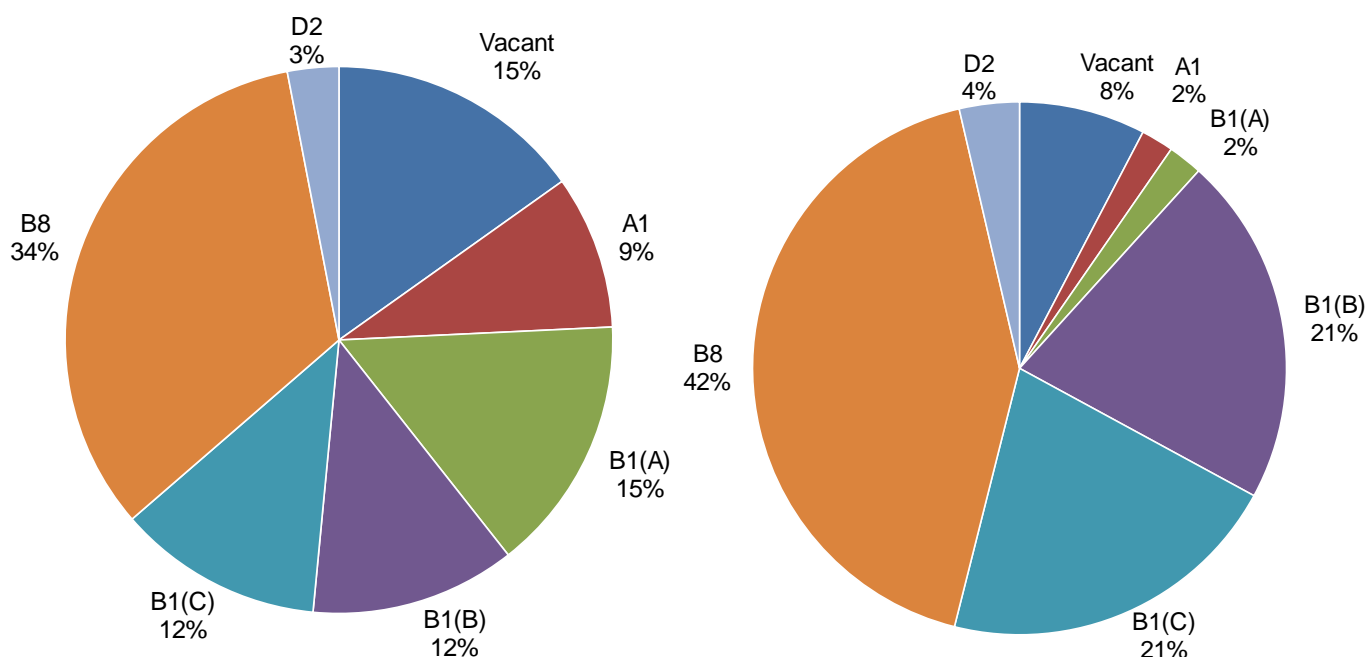
Vacancies & New Occupiers

Currently there are 5 vacant units in the Albert Road Estate, 2 of which are vacant first floor office suites located in Buckfield Buckland House. A total of 3 units in the estate have been vacant for more than a year.

	Total	Vacant	% Vacant
Units	33	5	15
Floorspace	12,935	990	8

Over the past year only two new occupiers moved into Albert Road North. One occupier took over a previously vacant unit; however, as this was one of the larger units on the estate it resulted in a significant drop in vacant floorspace down from 1,920sqm to 990sqm. The other new occupier, a tool and plant hire company, has occupied an area of cleared land which was the site of two buildings demolished some years back.

Use Classes



The composition of the estate in terms of its uses has changed very little since the last monitoring period. Despite a slight drop in the number of units in warehouse and distribution (B8) use in the last year, the majority of the estates units (34%) and floorspace (42%) still fall within this use class. The estate is well represented in terms of the various B1 uses, with B1(C) use and floorspace increasing up to 12% and 21% respectively, over the last 12 months. This is due to a new occupier (National Abrasives) moving into one of the estates larger units.

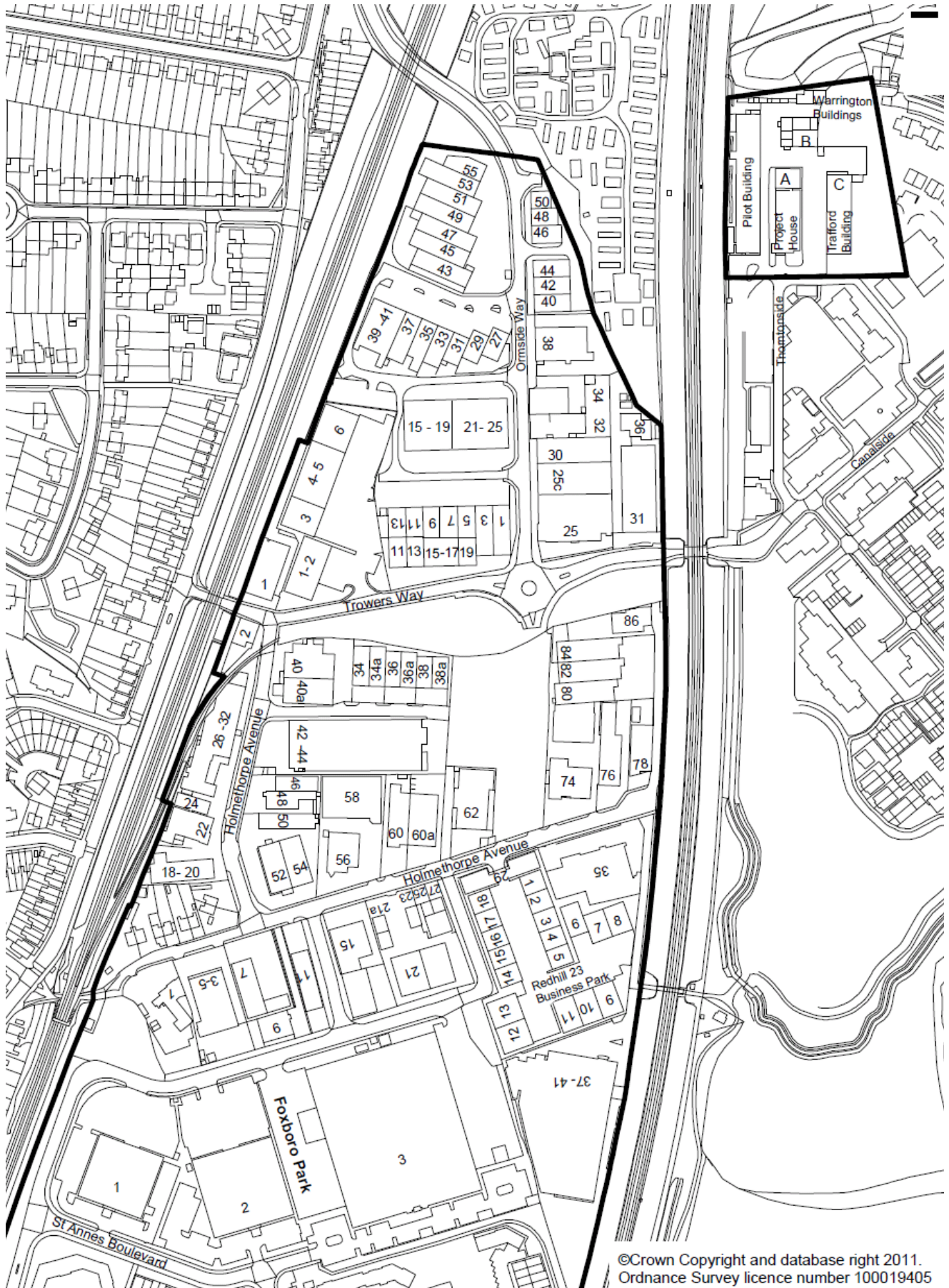
In terms of floorspace, it is clear that A1 and office (B1(A)) uses more commonly occupy smaller units: whilst they make up almost a quarter of all units, they only account for 4% of total floorspace. Once again, given the location of the estate (in a predominantly residential area), it is perhaps unsurprising that the proportion of industrial (B1(C)/B2) uses is more limited when compared to other estates.

Planning and Development Activity

Over the past year there has been one change of use (12/00663/CU) from B1/B2 to B8 use on the cleared site at 50-52 Albert Road North which is now occupied by a tool and plant hire company.

There are currently no extant planning permissions on the Albert Road Industrial Estate.

Holmethorpe Industrial Estate, Redhill



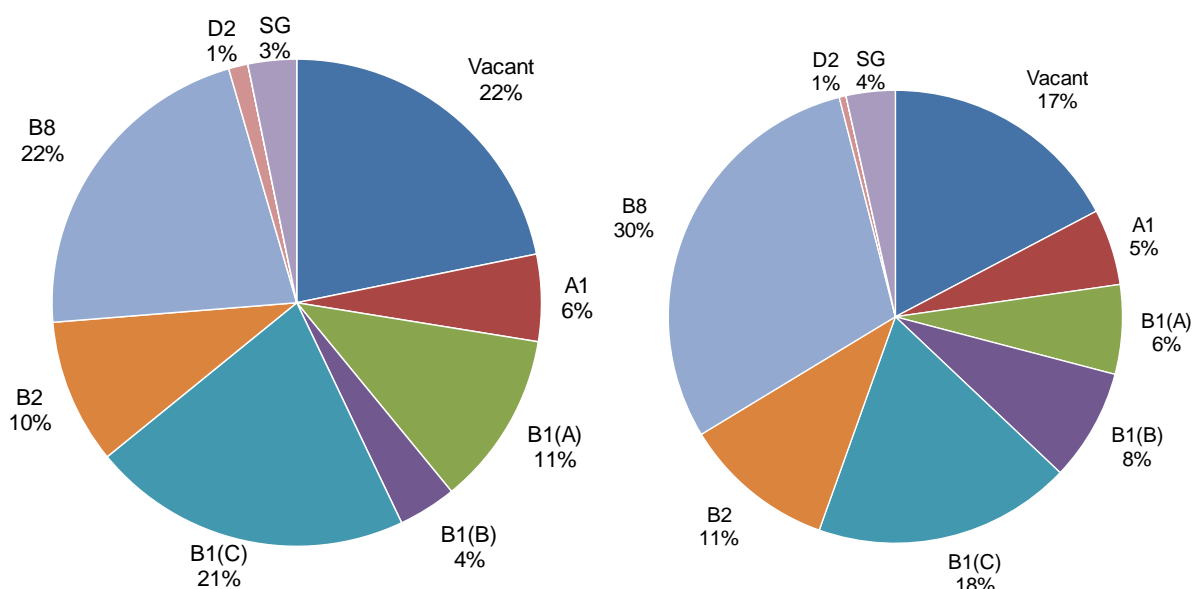
Vacancies & New Occupiers

There are currently 34 vacant units (22%) at Holmethorpe, a significant increase from last year's figure of 25 vacant units (16%). This has resulted in an increase in vacant floorspace which now stands at 14,240sqm equivalent to 21% of the total. Two new units built during the last year, increased the total number of units and floorspace on the estate.

	Total	Vacant	% Vacant
Units	156	34	22
Floorspace	82,404	14,240	17

A total of 10 new occupiers moved onto the estate over the past year, a decrease from last year's figure of 14. Five of the new occupiers took over previously occupied units, whilst 3 moved into previously vacant premises bringing 2,095sqm floorspace back into use. A further 2 new occupiers moved into the newly built industrial units at 12 Trowers Way, between them taking a total of 639sqm.

Use Classes



Over the last year the composition of the estate has changed, with the proportion of all occupied B1 and B2 uses falling, largely as a result of increased vacancy. B1(C) light industrial and B8 warehouse and distribution uses remain the most common and when combined occupy 43% of all units. Once again warehouse and distribution (B8) makes up the majority of the estates total floorspace, accounting for nearly one third. This is largely made up of the data centre (Digital Reality Trust) on St Annes Boulevard and also Lawsons Timber Store. Total industrial (B1(C)/B2) related uses make up 29% of the total floorspace, the majority of which are motor/vehicle related services

Planning and Development Activity

In the last couple of years there has been a notable increase in development proposals at the Holmethorpe Industrial Estate.

The 2 new industrial units on Trowers Way (10/00076/F) have been completed and both units are now occupied, providing an additional 775sqm of B1/B8 floorspace.

A revised proposal (12/01323/F) to redevelop the area of cleared land between Trowers Way and Holmethorpe Avenue has been granted permission. This proposal represents a significant new development providing 8 new industrial/warehouse units totalling some 3,000sqm of floorspace.

The council approved a planning application (12/00892/CU) for 33 Ormside Way proposing a change of use from B1(C) to B2 to be used as a MOT testing centre. This has now been completed and is now occupied by Sussex Autocare, taking over a previously vacant unit.

A further two applications are currently pending consideration the first, (13/00324/CU) proposing a change of use to part of the vacant unit at 26 Holmethorpe Avenue from B1 (offices) to A3/A5 (café/ takeaway). The second application submitted (13/00034/F) is south of Trowers Way, for a new vehicle repair centre (B2 use) which will provide 644 sqm of additional commercial floorspace.

Wells Place, Merstham



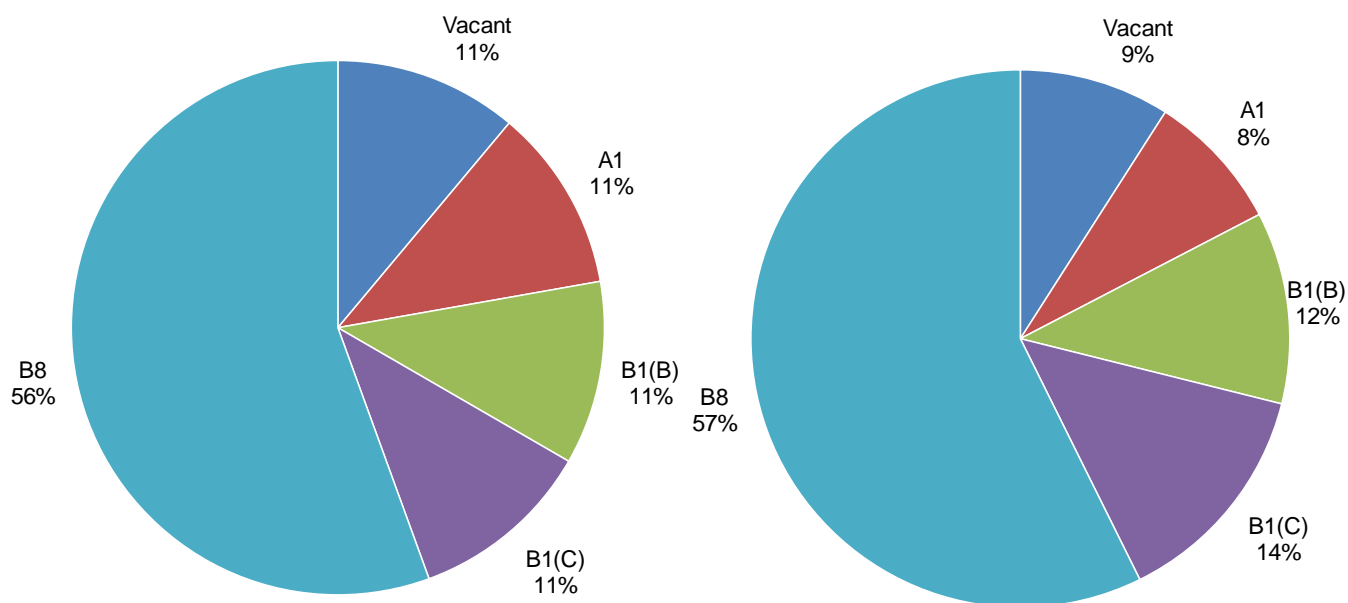
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Vacancies & New Occupiers

For the second consecutive year, only one unit currently stands vacant in Wells Place. This unit has become vacant in the last 12 months, whilst one new occupier (B&Q) moved into Unit 1 which prior to that had stood vacant for a number of years.

	Total	Vacant	% Vacant
Units	9	1	11
Floorspace	26,590	2,405	9

Use Classes



Wells Place is typified by large purpose built commercial units arranged around a central spine road. The estate is dominated by warehouse and distribution (B8) uses, with almost 60% of units and floorspace falling within this use class. There has been a slight change in Wells Place over the last year, with B&Q moving into a previously vacant unit and Hartest moving out leaving one unit vacant. This has resulted in a slight drop in the total vacant floorspace from 2,500 sqm down to 2,405 sqm.

Planning and Development Activity

There are a number of relevant development proposals at Wells Place:

Development of a B8 warehouse unit on the land parcel opposite Granville House under application 04/00100/F still remains extant as a result of a certificate of lawfulness for a material start which, was submitted in late 2009.

There is still extant permission to develop an additional B1(C)/B8 unit (10/01954/OUT) opposite the Granville House site.

A further planning application (12/01352/F), seeking to build a B1(b) unit in place of the B1(c) unit approved under 10/01954/OUT to extend the existing Unit 3 (B8 use) onto an area of Urban Open Land was refused by the Council. The applicants have appealed this decision.

Reading Arch Road Industrial Area, Redhill



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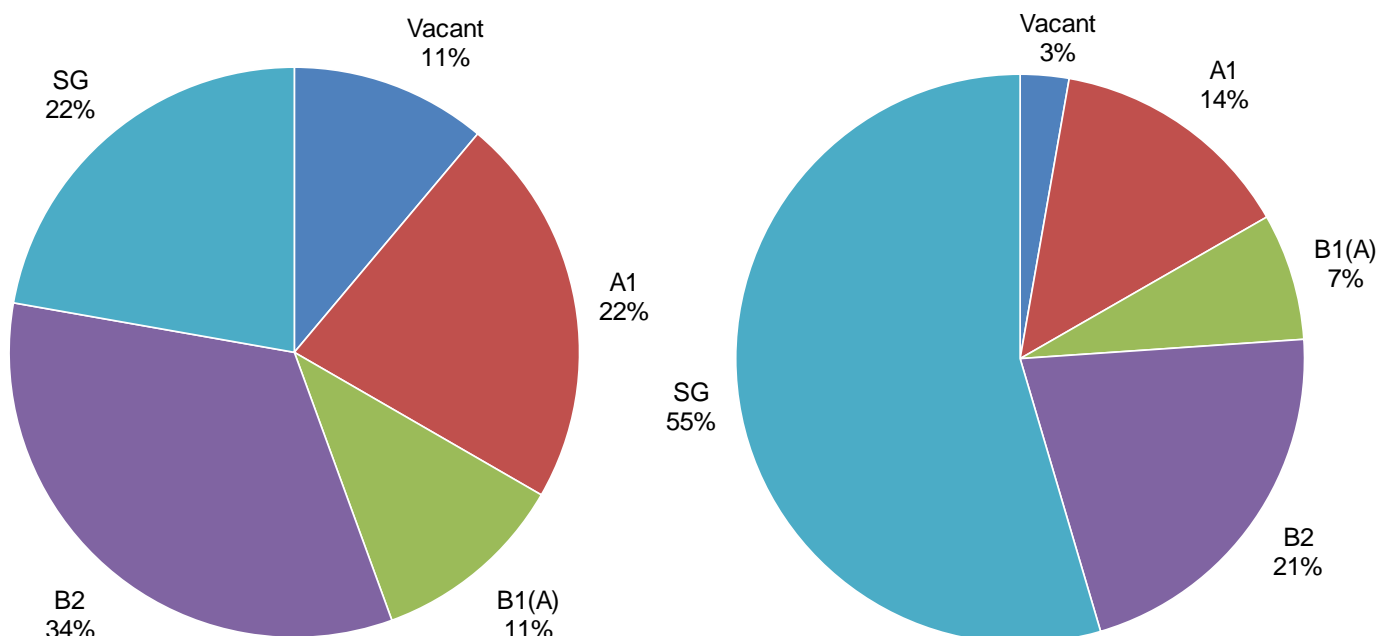
Vacancies & New Occupiers

There has been a slight drop in vacancy at Reading Arch Road Industrial Estate, with a new occupier (Redhill Alignment Centre) moving into a previously vacant unit. As a result, the number of vacant units now stands at just one and the amount of vacant floorspace only 115sqm. The unit at 20 Reading Arch Road remains vacant and has done for some time.

	Total	Vacant	% Vacant
Units	9	1	11
Floorspace	4,160	115	3

In the last 12 months one new occupier moved into a previously vacant unit, bringing 190sqm of vacant floorspace back into use.

Use Classes



The estate is predominately made up of motor/ vehicle related businesses, which has further increased in the last year with another vehicle maintenance business moving into the estate. Currently 6 out of the 9 units are occupied by motor related businesses and this is reflected in the estates composition, with B2 and SG uses accounting for 34% and 22% respectively. Both use classes account for over three quarters of the total floorspace, a large proportion of which is occupied by the Ford Car garage and includes the land at the northern corner of the site (adjacent to 20 Reading Arch Road) used for additional vehicle storage by the dealership.

Planning and Development Activity

No new developments have been carried out during the period and there are currently no extant permissions or notable applications.

Kingsfield Business Centre, Redhill



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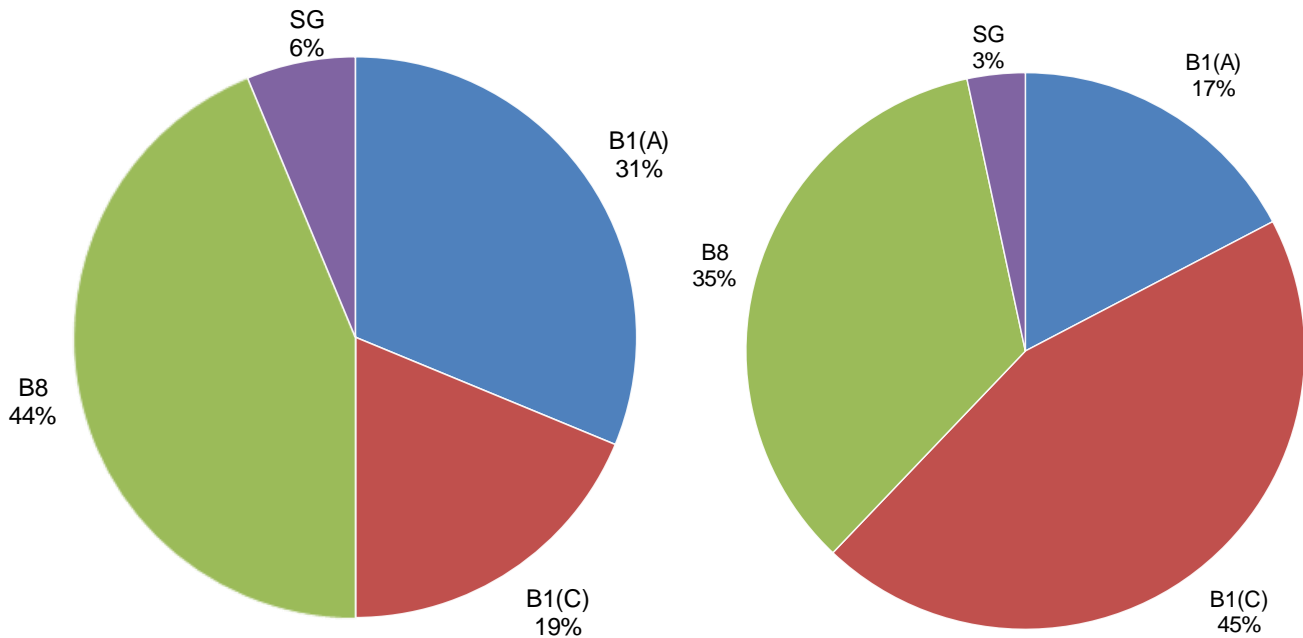
Vacancies & New Occupiers

There remain no vacant units at Kingsfield. This has been the case since 2007.

	Total	Vacant	% Vacant
Units	16	0	0.0
Floorspace	8,205	0	0.0

Kingsfield Business Centre was the only industrial estate in the borough not to see any change in occupiers over the past year.

Use Classes



The estate continues to be dominated by two businesses; Surrey & Borders Partnership NHS Trust previously known as Surrey Oaklands NHS Trust and Respirex, the former occupying 4 units whilst Respirex currently occupies 5 of the estates units. When combined both businesses make up 56% of the estate.

Warehouse and distribution (B8) uses remains the predominant use on the estate, accounting for 44% of units. The centre also has a high presence of B1(a) use accounting for 31% of the total. Light industrial (B1(C)) use makes up 45% of the estates floorspace, a large proportion of which (4,035 sqm) is occupied by Respirex. Warehouse and distribution (B8) uses account for over a third of the total floorspace.

Planning and Development Activity

During this monitoring period there have been no new developments on the estate nor are there any extant permissions or notable applications within the estate.

Perrywood Business Park, Salfords



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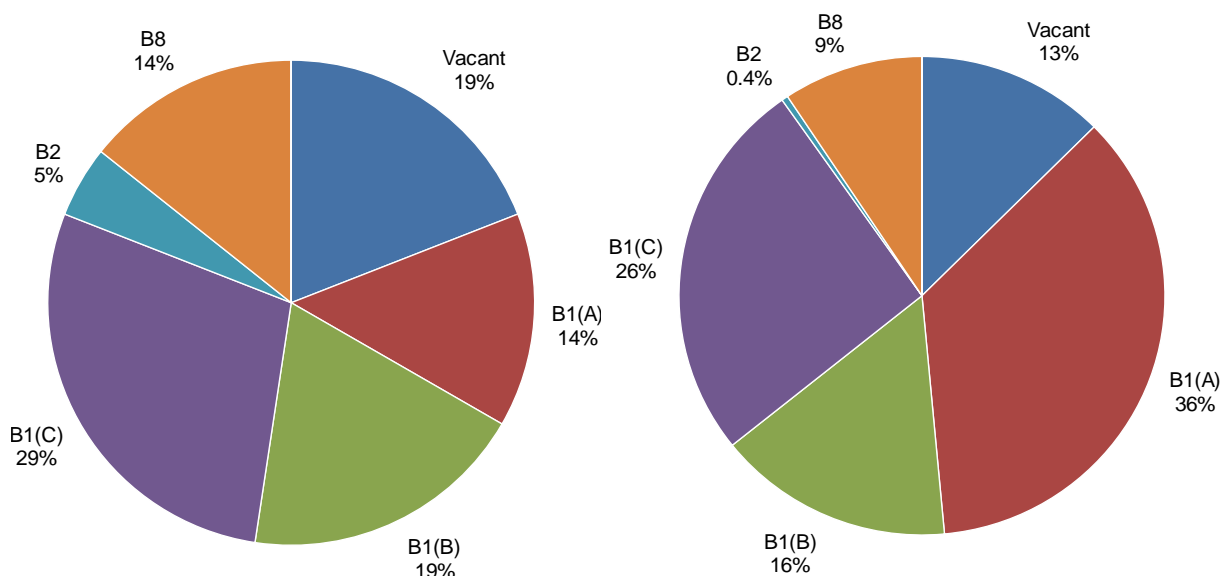
Vacancies & New Occupiers

There are currently 4 vacant units on the Perrywood Industrial estate, double the level recorded at the end of the last monitoring period. Of the 4 vacant units, 2 have been to let / for sale for a number of years now whilst the other 2 units became vacant in the last 12 months. As a result the amount of unoccupied floorspace has more than doubled, with the rate rising to 13% of the total floorspace.

	Total	Vacant	% Vacant
Units	21	4	19
Floorspace	24,690	3,095	13

One new occupier (Acro aircraft services) took over a previously occupied unit, while 2 businesses moved out of the estate. Swarovski now only occupies 1 unit instead of 2 units as recorded in the previous monitor, since relocating its head office to Chiswick Park in April 2012. This has further added to the estates vacancy rate. The other was occupied by Thyssenkrup Kraue (engineering services), who occupied a total of 2 units in the estates, one of which is currently vacant, whilst a (Arco) moved into the other unit.

Use Classes



Over the past year there has been a drop in B1 use from over 70% down to 62%, despite this fall B1 use still remains the dominant use class in terms of units, in particular light industrial (B1(C)) use making up 29% of the total units. There has been a drop in B1(A) use in the last 12 months down from 19% to 14% as a result of Swarovski moving out of one of the units. This in turn has seen a drop in B1(A) floorspace from 40% down to 36%. Despite this B1(A) office use continues to be the primary use class in terms of floorspace. Compared to the borough's other industrial estates, Perrywood Park still has one of the lowest representations of B8 uses (warehouse & distribution), as the centre is predominately occupied by service based businesses.

Planning and Development Activity

There are 2 extant planning permissions on the Former Matrix Site; the most recent application (10/02104/F) was approved to use the site as a temporary car park, which has not yet been implemented. The second extant permission (10/01873/F) to redevelop the cleared site will provide 3,700sqm of B1(B), B1(C) & B8 units on this site. However, the likelihood of development commencing in the near future is slight given the current economic climate.

Salfords Industrial Estate, Salfords



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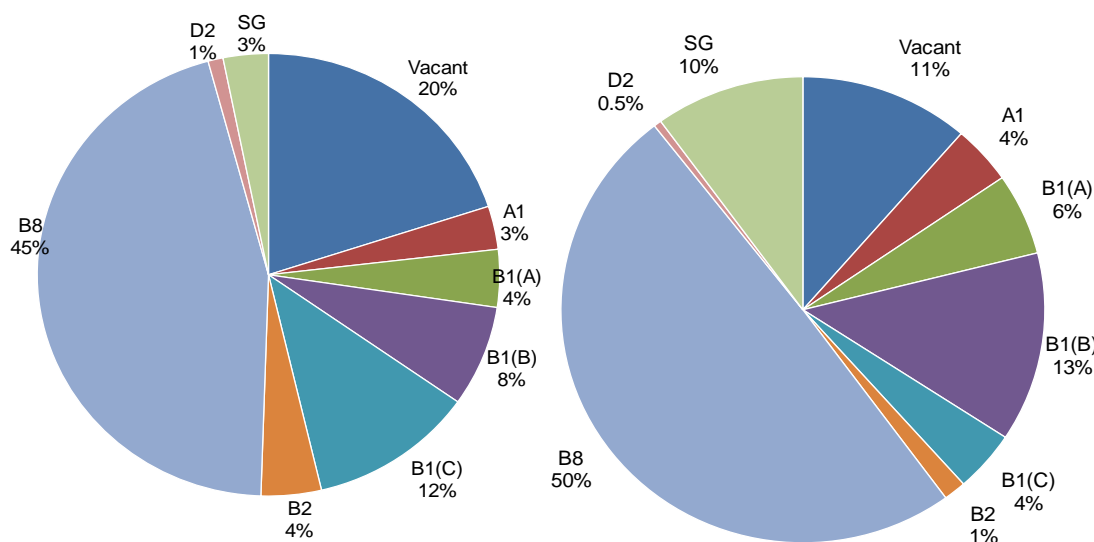
Vacancies & New Occupiers

Over the past year the total number of vacant units at Salfords Industrial estate has stayed at 19 (20%). Conversely, total vacant floorspace has increased up to 9,295sqm – which now equates to 11% of the total - as a result of several larger units becoming vacant. Once again the majority of the estates vacancies are located within the *IO Centre*; however, two units on the development are currently under offer.

	Total	Vacant	% Vacant
Units	95	19	20
Floorspace	81,826	9,295	11

The past year has seen a significant drop in the number of new occupiers moving onto the estate. Only 5 new occupiers moved in during the last 12 months, down from 13 the previous year. As a result, net take up 3,030sqm, considerably lower than last years figure of 4,400sqm. Of the new occupiers, two moved into previously vacant units. Surrey Police is currently fitting out in a previously vacant unit and a further two took over previously occupied units. The estate has the highest number of vacant units compared to the other estates in the borough and currently stands at 22 units, 17 of which have been vacant for more than a year. This has subsequently led to a sharp increase in total vacant floorspace which currently stands at 9,295 sqm (11%) and includes a large unit (2,300 sqm) vacanted by Yodel over the past year.

Use Classes



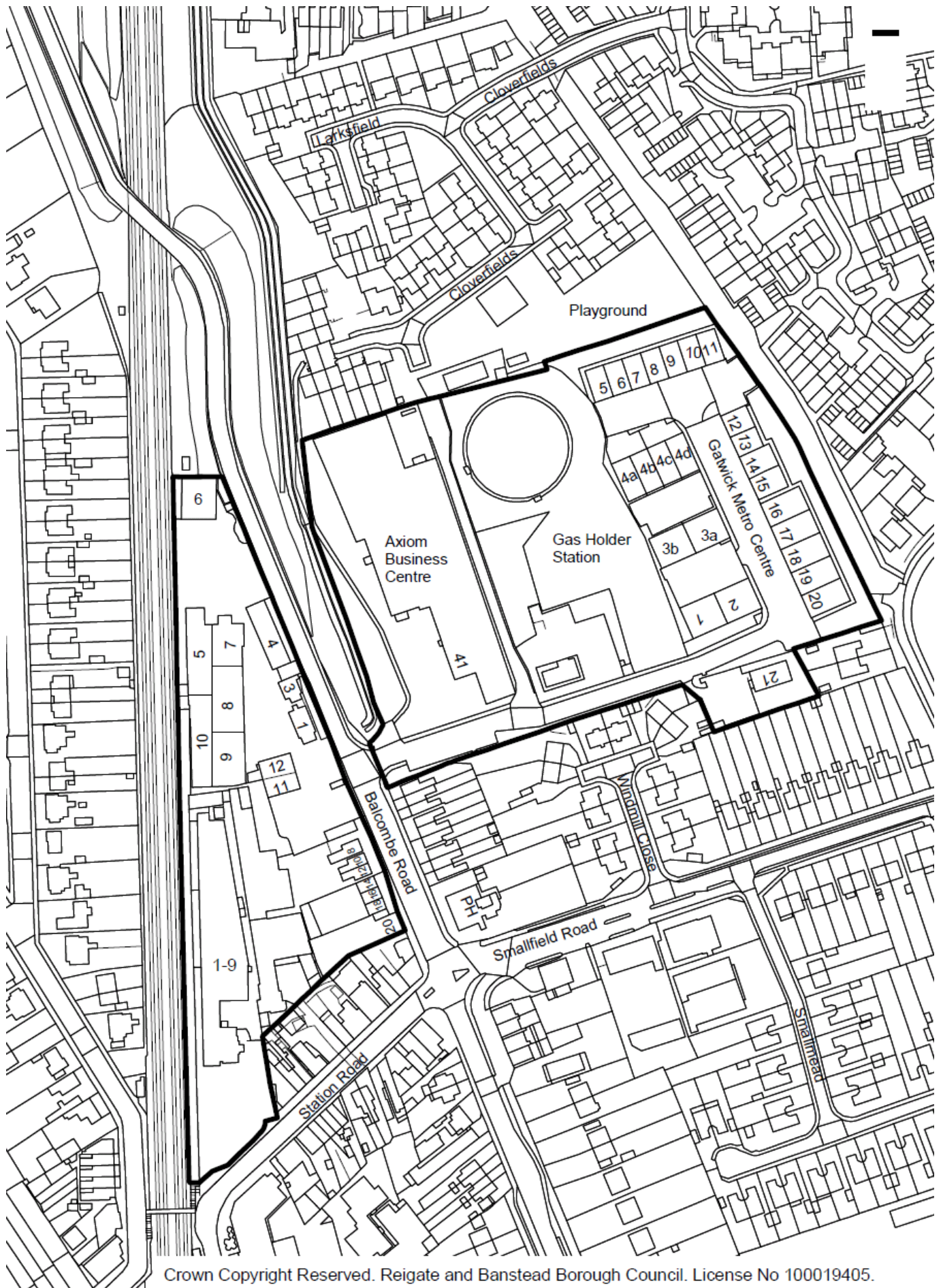
Given its strategic location on the A23 corridor, it is perhaps expected that Salfords is dominated by warehouse and distribution (B8) uses which accounts for 45% of units and 50% of floorspace. Despite B8 use and floorspace dominating the estate, the last 12 months has seen a number of warehouse and distribution businesses vacant premises on the estate. Against this the estate continues to have a varied make-up consisting of a further 7 different uses including B1(B) and B1(C) occupiers.

Planning and Development Activity

There is an extant outline permission (07/01810/OUT) for the phased redevelopment of the Titan Travel campus to provide more than 8,000 sqm of office space across five campus buildings; however there is no evidence to suggest that this application is likely to be implemented in the near future. Additionally, the former Phillips Laboratory has been demolished but there is still no activity in relation to redevelopment of the site.

A further planning application (10/00616/CU) for the change of use of Unit 1 at the IO Centre to provide a custody centre for Surrey Police is currently being fitted out.

Balcombe Road Industrial Area, Horley



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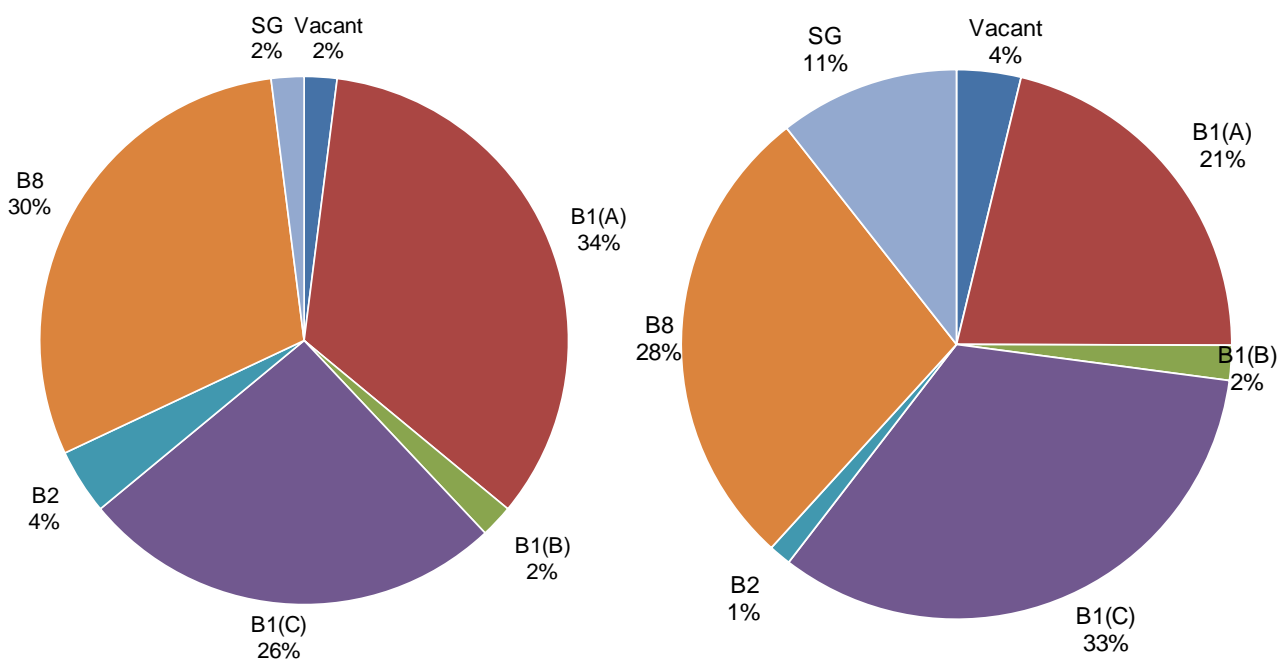
Vacancies & New Occupiers

For the second consecutive year, the vacancy rate and floorspace on Balcombe Road industrial estate has dropped. There is currently only one vacant unit down from two units recorded in the previous monitoring year. Vacant floorspace has also dropped down from under 900sqm to just under 700sqm, which equates to 4% of the total floorspace.

	Total	Vacant	% Vacant
Units	50	1	2
Floorspace	18,285	690	4

In the last 12 months there has been a slight change in the estate with a couple of moves in and out. Two new occupiers moved in, one taking over a previously vacant unit whilst the other moved into a previously occupied unit, resulting in a slight increase in the number of units in B1(A) and B8 use. Combined, these two uses represent over two thirds of all the estates units. One unit became vacant in the last year.

Use Classes



The estate comprises of three separate areas; Gatwick Metro Centre, Axiom Business Centre and Bridge Industrial Estate, the former two both consist of more modern units. Given the estates close proximity to Gatwick Airport it is not surprising there are a number of airline based manufacturing and service occupiers. The estate has three equally dominant uses; B1(A), B1(C) and B8.. B1(A) use makes up 34% of all units and more than a fifth of the total floorspace and consists of a number of specialist office based occupiers such as; graphic design and marketing. B1(C) use accounts for 26% of all premises which equates to over a third of the total floorspace and includes several small manufacturing based industries. Storage and distribution (B8) use makes up 30% of all premises equal to 28% of the total floorspace.

Planning and Development Activity

No new developments have been carried out during this monitoring period and there are no extant permissions or notable applications.

Appendix

Use Classes Order

Use Class	Description of Use/Development	Permitted Change
A1	Shops, retail warehouses, hairdressers, travel agents, post offices, sandwich bars, Internet cafes, showrooms, domestic hire shops, undertakers and dry cleaners.	No permitted change
A2	Banks, building societies, estate agents, professional and financial services.	A1
A3	Restaurants and cafés.	A1 or A2
A4	Drinking Establishments.	A1, A2 or A3
A5	Hot Food Takeaways.	
B1(A)	Use as an office other than a use within Class A2 (financial and professional services).	B8 (where no more than 235 sq.m.)
B1(B)	Use for research and development, studios, laboratories, high technology.	
B1(C)	Use for any industrial process that can be carried out in a residential area without detriment to amenity.	
B2	Use for the carrying on of an industrial process other than one falling in B1(C) above.	B1 or B8 (B8 limited to 235 sq.m.)
B8	Use for Storage or Distribution.	B1 (where no more than 235 sq.m.)
C1	Use as a hotel, boarding house or guesthouse where no significant element of care is provided	No permitted change
C2	Residential institution such as a nursing home or residential school.	No permitted change
C3	Use as a dwelling house, whether or not as a sole or main residence.	No permitted change
D1	Non-Residential Institutions.	No permitted change
D2	Use for Assembly and Leisure.	No permitted change
SG	Sui Generis - falls outside all other categories. Permission is required to change to or from such a use.	No permitted change

Full occupier schedules for each of the industrial estates are available on request. Please contact the Policy Team on 01737 276000 or email LDF@reigate-banstead.gov.uk.

Monitoring Publications

Regular Monitors:

Areas for Small Businesses

Provides a list of all uses in the Borough's seven Areas for Small Businesses (Annual)

Commercial Commitments

Contains the amounts, types and location of all commercial commitments i.e. premises with outstanding planning permissions or vacant floorspace (Annual)

Housing Delivery

Provides information on general housing market trends and the delivery of the amount, type and location of housing commitments in the Borough (Annual)

Industrial Estates

Contains an analysis of occupational trends in the Borough's nine main Industrial Estates including a schedule of occupiers (Annual)

Local Centres

Provides information on retail provision in the Borough's eighteen local shopping centres (Annual)

Town Centres

Provides information on the occupiers, together with vacancies and shop type of all premises within the Borough's four Town and Village Centres (Bi-annual)

Population and Demographic Information

These publications are available on the Council website:

<http://www.reigate-banstead.gov.uk>

Search for: "*monitors*":

For further information on the content or other planning policy monitoring, please contact:

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