

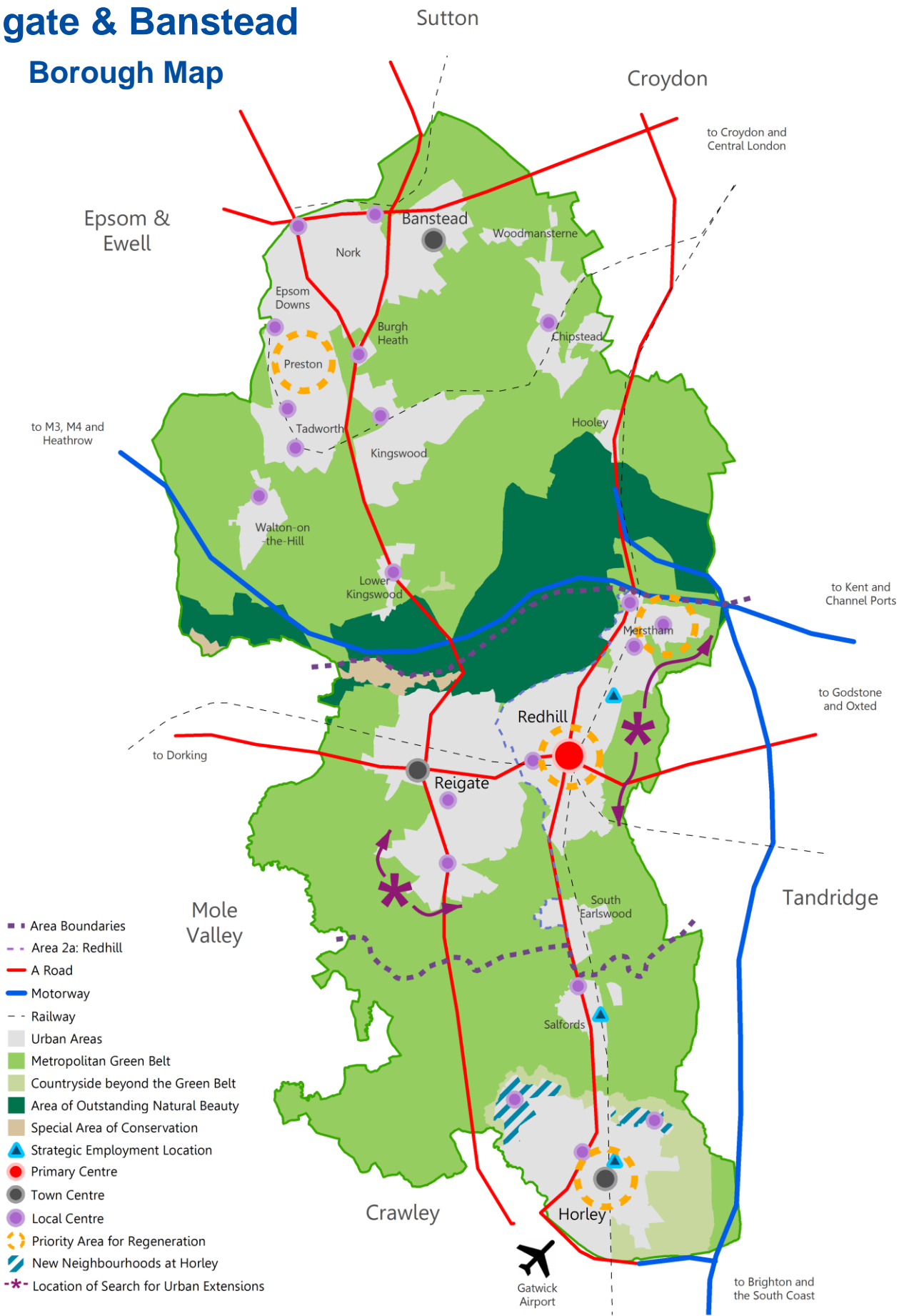


Industrial Estates Monitor

March 2015

Reigate & Banstead

Borough Map



Industrial Estates Monitor

March 2015

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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 2015. 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 had its Core Strategy formally adopted on 3rd July 2014 after a formal examination period and the production of extensive evidence and technical research. It now forms part of the Development Plan and is used in decision-making on planning applications.

The Core Strategy outlines what Reigate and Banstead will look like in 2027; it contains policies to protect the Green Belt and townscapes; outlines how much growth will take place, where it will occur and how it will be delivered sustainably; and 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 and Logistics Market 2015 Report, activity in the industrial and distribution market nationally hit an all time high in 2014.

The research reports that take up across the country increased by 10% to over 103.3 million sqft due to economic expansion, a recovering manufacturing sector and continued growth of e-commerce. The South East remained the strongest region for small industrial space demand (<10,000sqft), with over 3.9 million sqft of take-up during 2014, up from 3.4 million sqft the previous year. As a result availability in the industrial market has continued to fall over the past year to less than 7% of available supply due to a lack of development since 2007/2008. Specifically, the South East region has amongst the lowest supply of grade A space which has led to an increase in demand and rents in the second hand market.

The improvement in the market has led to investors and developers restarting speculative development and occupiers starting again to build to suit. The report indicates that around 2.2 million sqft of speculative development was undertaken in 2014 and this is anticipated to grow to in excess of 4 million sqft in 2015.

Borough Trends

The borough's industrial estates contain around 405 business premises and provide over 264,555 of floorspace. Taken together, the estates incorporate about 38% of all employment floorspace in the borough.

- **Vacancies** – There are currently 63 (15.6%) vacant units across the borough's 9 industrial estates, which is just 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: Holmethorpe continues to have the highest number of vacancies at 28 units, whilst Reading Arch Road and Wells Place currently have no vacancies. Vacant floorspace stands at 27,505sqm (10%).
- **New Occupiers** – A total of 38 new occupiers moved into the Industrial Estates in the last year, of which 27 took over previously vacant units, whilst 11 moved into previously occupied units. Holmethorpe Industrial Estate had the highest take up at 16 units, whilst both Reading Arch Road and Wells Place both had no new occupiers move in. Over the past year the total take-up was 16,810sqm, whilst 4,525sqm became newly vacant across the 9 estates, resulting in a net gain of 12,285sqm.
- **Land Use Trends** – As has been the case since 2006, B8 (warehouse/distribution) is the dominant use across the industrial estates, accounting for around 32% of all units and 40% of floorspace. Over the last decade, B8 use has continued to increase whilst B1(C) use has continued to fall and now accounts for around 18% of the total. The decline has stabilised in the last 5 years. There has been some change in B1 (A) office use which has dropped to 14%, on the whole there has been relatively little change in total B1(A) use. 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 three quarters of units and almost 80% of floorspace across the nine estates.
- **Land Use Classes** – The borough's 9 industrial estates combined are made up of 9 different use classes. The predominant use is B8 (warehouse and distribution) making up 32% of all units which is equal to 40% of the total floorspace. When combined together,

the most common employment uses (B1, B2 and B8) account for 75% units and 79% of floorspace.

- **Major New Developments** – Since the last monitor was produced there has been an increase in the number of planning applications proposing changes of use, extensions and new developments which could potentially provide a further 16,200sqm of net additional employment floorspace. However, the actual delivery of new floorspace remains subdued, for example within the last year two new units have been constructed on the Holmethorpe Industrial Estate adding 755sqm of floorspace.
- **Planning Applications:** There are currently two planning permissions under construction within the nine industrial estates and nine outstanding planning permissions which suggests that there is ongoing interest. These planning permissions have been granted with core strategy priority five in mind; that no schemes permitted will result in a net loss of B1-B8 employment floorspace in designated employment areas. They instead could potentially deliver around 16,200sqm of net additional employment floorspace.

Breakdown of Use Classes

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

Industrial Estate	A1	A3	B1(A)	B1(B)	B1(C)	B2	B8	D1	D2	SG	Vacant	Total
Pitwood Park	0	0	4	3	1	0	3	0	0	0	3	14
Albert Road North	3	0	2	4	4	0	12	0	1	0	7	33
Holmethorpe/Foxboro	10	2	17	5	34	13	40	1	3	6	28	159
Wells Place	1	0	0	1	1	0	6	0	0	0	0	9
Kingsfield Business Centre	0	0	4	0	4	0	6	0	0	1	1	16
Reading Arch Road	2	0	1	0	0	3	0	0	0	3	0	9
Perrywood Business Park	0	0	4	4	5	1	1	0	0	0	6	21
Salfords	3	0	7	7	11	3	48	0	0	3	14	96
Balcombe Road	0	0	17	1	13	3	12	0	0	1	4	51
Total	19	2	56	25	70	23	128	1	4	14	63	405
Percentage	4.7	0.5	13.8	6.2	17.3	5.7	31.6	0.2	1.0	3.5	15.6	

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

Industrial Estate	A1	A3	B1(A)	B1(B)	B1(C)	B2	B8	D1	D2	SG	Vacant	Total
Pitwood Park	0	0	755	840	120	0	460	0	0	0	2,455	4,630
Albert Road North	255	0	760	2,745	2,715	0	5,560	0	470	0	430	12,935
Holmethorpe/ Foxboro	4,740	206	5,099	6,425	15,349	7,730	25,910	100	840	2,990	13,835	83,224
Wells Place	2,210	0	0	3,070	3,665	0	17,645	0	0	0	0	26,590
Kingsfield Business Centre	0	0	1,350	0	3,895	0	2,615	0	0	275	70	8,205
Reading Arch Road	580	0	300	0	0	895	0	0	0	2,385	0	4,160
Perrywood Business Park	0	0	9,565	3,885	5,380	105	675	0	0	0	5,080	24,690
Salfords	3,315	0	6,201	7,440	4,153	675	47,302	0	0	8,185	4,555	81,826
Balcombe Road	0	0	3,600	375	6,095	1,040	4,160	0	0	1,935	1,080	18,285
Total	11,100	206	27,630	24,780	41,372	10,445	104,327	100	1,310	15,770	27,505	264,555
Percentage	4.2	0.1	10.4	9.4	15.6	4.0	39.4	0.0	0.5	6.0	10.4	

Vacancies & New Occupiers

Vacancy Trend

In the last 12 months the total number of vacant premises across the boroughs nine industrial estates has declined from 75 to 62 units. Correspondingly the vacancy rate has declined from 18.6% to 15.6%, and now sits only very slightly above 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.

Figure 1 Long Term Vacancy Trend - Units (2000 - 2015)

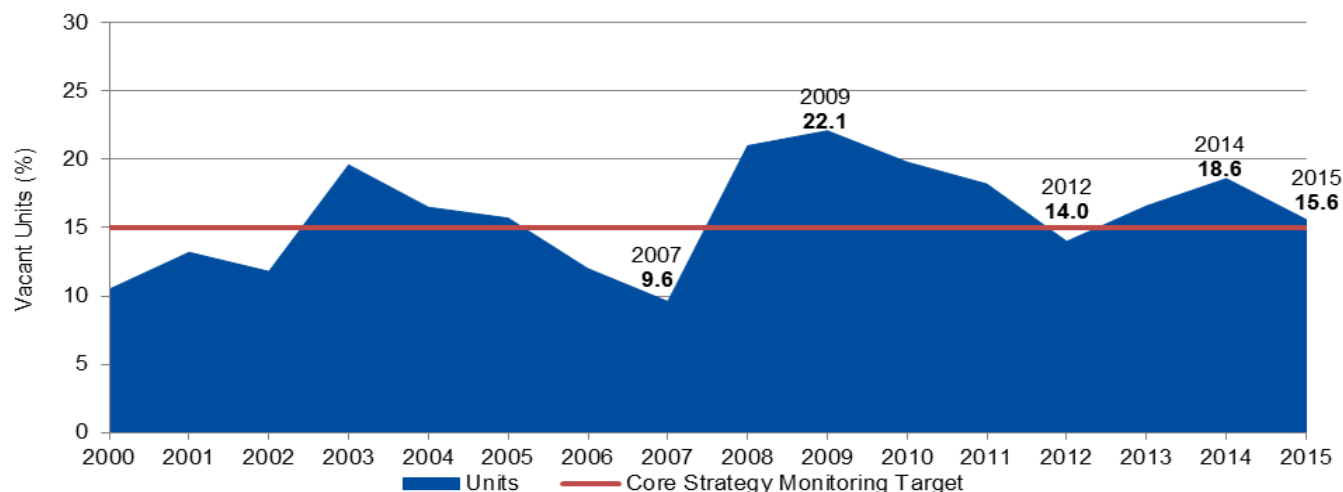


Figure 2 Long Term Vacancy Trend - Floorspace (2011 - 2015)

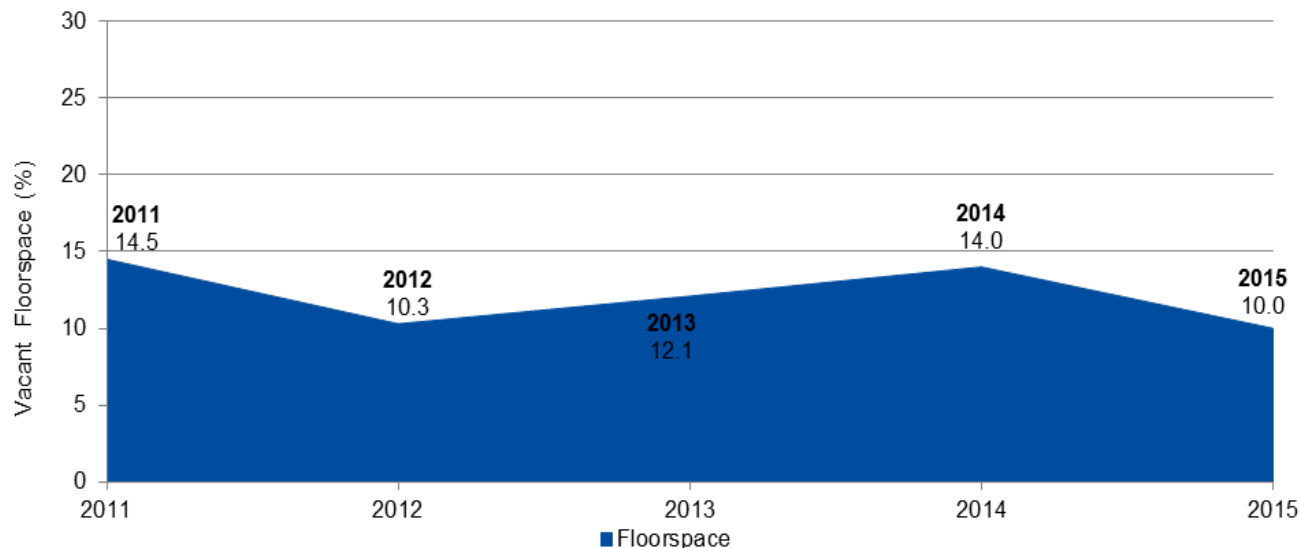


Figure two shows that within the last twelve months vacant floorspace across the nine estates has declined to from 37,015sqm to 27,505sqm (14% to 10%): a significant improvement - demonstrating that demand from businesses to locate on the borough’s industrial estates is healthy.

Table 3 below shows the longer term vacancy trend for each of the individual estates. The table shows that Kingsfield Industrial Estate no longer has the nil vacancy rate which it has had for the past seven years and instead has a vacancy rate of 6.3%. This is due to Surrey and Borders Partnership vacating one of the units that they occupy. The table shows that within the last twelve months Pitwood Park, Holmethorpe, Salfords, Perrywood and Balcombe Road all saw a decline in vacancy rates, whilst Wells Place and Reading Arch Road saw no change.

Just under half of the borough's industrial estates fail to meet the Core Strategy Monitoring Target of a 15% vacancy rate. However, the improvement in vacancies at the borough's two largest estates - Holmethorpe and Salfords - over the past couple of years is a positive sign.

Table 3 Individual Estate Vacancy Trends 2001 - 2015

	2001	2008	2009	2010	2011	2012	2013	2014	2015
Pitwood Park	6.3	11.8	7.7	7.7	7.7	7.7	14.3	28.6	21.4
Albert Road North	6.3	25.0	18.2	15.2	13.3	13.3	15.2	27.3	27.3
Holmethorpe	18.3	23.0	23.0	21.7	20.4	16.2	21.8	23.1	17.4
Wells Place	0.0	11.1	0.0	11.1	11.1	11.1	11.1	0.0	0.0
Kingsfield	7.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	6.3
Reading Arch Road	9.0	7.7	23.1	15.4	22.2	22.2	11.1	0.0	0.0
Salfords	18.0	19.4	36.7	32.0	28.7	20.2	20.0	16.8	14.7
Perrywood	9.0	25.0	5.0	9.5	13.6	9.5	19.0	28.6	28.6
Balcombe Road	9.0	26.9	15.1	9.4	6.0	4.8	2.0	8.0	7.8
Borough-wide	13.2	21.0	22.1	19.8	18.2	14.0	16.6	18.6	15.6

The amount of vacant floorspace varies across each of the individual industrial estates; Holmethorpe Industrial Estate has the greatest amount of vacant floorspace (13,835sqm) followed by Perrywood (5,080sqm) and Salfords (4,555sqm). Together these account for nearly 85% of total vacant floorspace. Conversely, Wells Place and Reading Arch Road have no vacant floorspace.

New Occupiers

In the last 12 months, 38 new occupiers moved into the borough's industrial estates an increase compared to last year when 32 new occupiers moved into the borough's industrial estates. A large proportion of the new occupiers took over previously vacant units bringing more than 14,000sqm of vacant floorspace back into use.

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

	Take-Up – Previously:		New Development	New Vacancies
	Vacant	Occupied		
Pitwood Park	2 (225sqm)	0 (0sqm)	0 (0sqm)	2 (1,715sqm)
Albert Road North	3 (830sqm)	1 (270sqm)	0 (0sqm)	4 (270sqm)
Holmethorpe	14 (3,925sqm)	2 (755sqm)	3 (820sqm)	4 (890sqm)
Wells Place	0 (0sqm)	0 (0sqm)	0 (0sqm)	0 (0sqm)
Kingsfield	0 (0sqm)	2 (340sqm)	0 (0sqm)	1 (70sqm)
Reading Arch Road	0 (0sqm)	0 (0sqm)	0 (0sqm)	0 (0sqm)
Salfords	6 (8,375sqm)	1 (195sqm)	0 (0sqm)	3 (1,315sqm)
Perrywood	1 (680sqm)	1 (515sqm)	0 (0sqm)	0 (0sqm)
Balcombe Road	1 (50sqm)	4 (650sqm)	1 (40sqm)	1 (265sqm)
Total	27 (14,085sqm)	11 (2,725sqm)	4 (860sqm)	15 (4,525sqm)

Of the 38 new occupiers, 27 moved into premises that were previously vacant, whilst 11 took over previously occupied units. A further unit has been recently let and is undergoing cosmetic alterations. Against this, 15 new units totalling 4,525sqm became vacant in the last year, a reduction from 29 new vacancies recorded in 2014.

Since the last monitor was produced there has been a reduction in the number of newly vacant units, this year there were 15 whilst last year there were 29.

Development Activity

Within the last 12 months there have been some changes of use across the borough's nine industrial estates, resulting from several new occupiers moving into premises in Holmethorpe and Salfords.

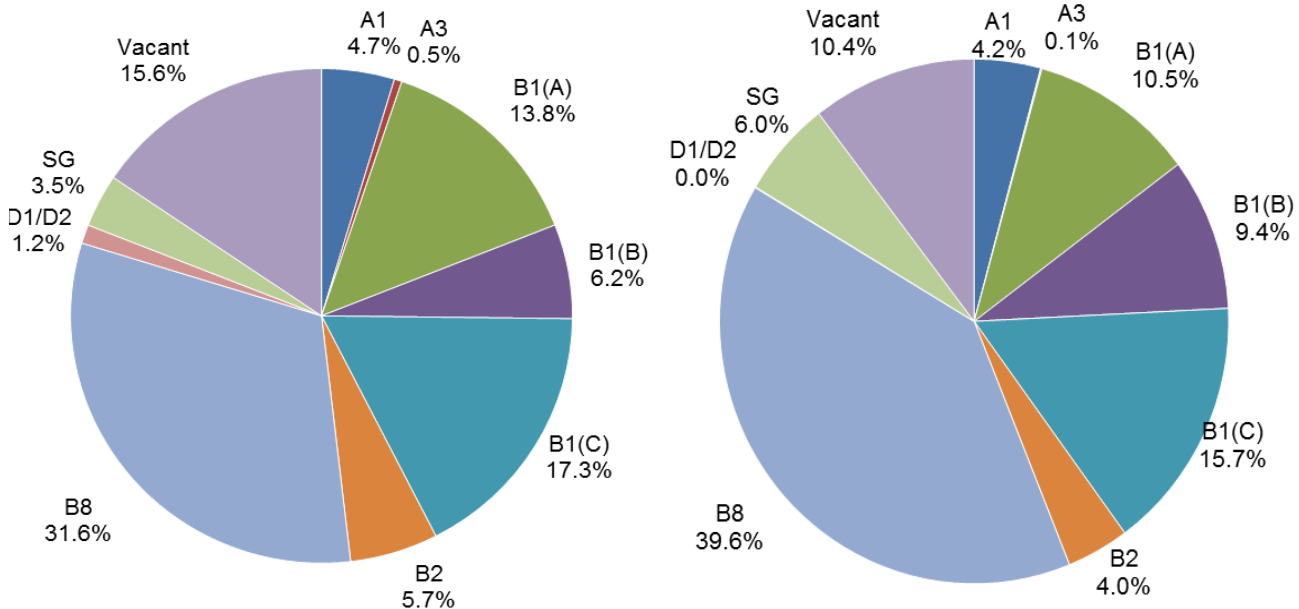
Within the borough's nine industrial estates there are a number of outstanding and extant planning permissions (15) which suggests that there is ongoing interest. These permissions could potentially deliver around 16,200sqm of net additional employment floorspace.

Use Classes

Use Class Composition

In total, the main employment uses (B1, B2 & B8) account for 74% of units. The single most common use is still B8 warehouse & distribution which accounts for 32% of all units, followed by B1(C) light industrial use at 17%. B8 use also dominates in terms of floorspace accounting for nearly 40% of the units. 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 79% of the total floorspace

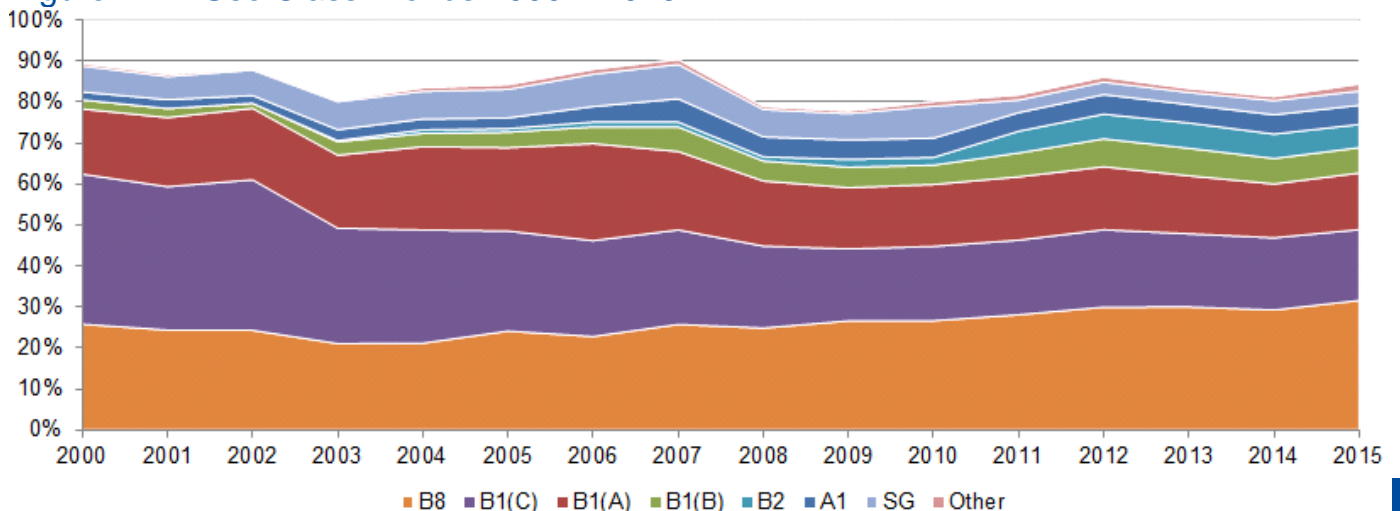
Figure 3 Use Class Breakdown (Left – Units; Right – Floorspace)



Use Classes Trends

Figure 4 below shows the long term use class trend across the combined industrial estates. The growth in - and move towards B8 - warehouse & distribution type uses is apparent with the proportion of such uses rising from around 25% in 2000 to a current level of 32%. 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 peak of 24% in 2006.

Figure 4 Use Class Trends 2000 – 2015



Individual Estate Analysis

Pitwood Park Industrial Estate, Tadworth



Pitwood Park Industrial Estate

Pitwood Park Industrial Estate is predominantly comprised of service use (43%) for example Calderstone Marketing and Graphic Design, Portako Print Procurement and Swift Southern Ltd Builders / Carpenters; manufacturing (22%) including Linkam Scientific Ltd and Wadsworth Security Products; and distribution uses (14%) such as Healy Refrigeration and MHG Heating.

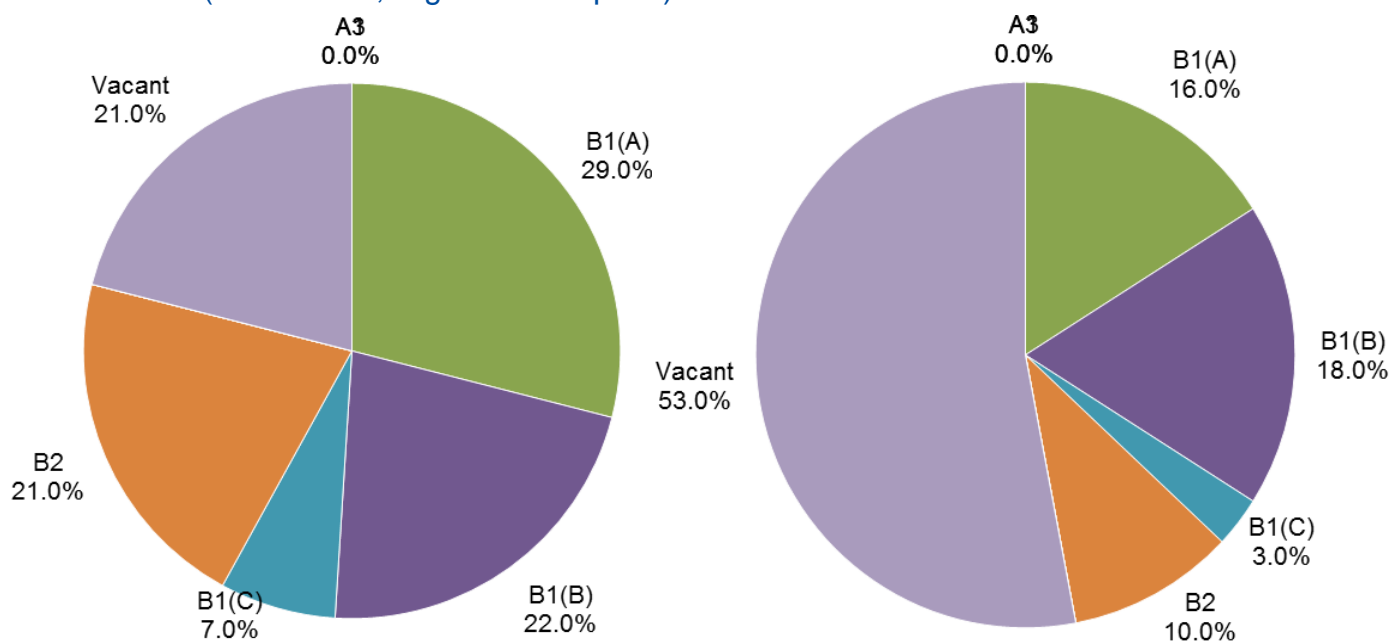
Vacancies & New Occupiers

Since the last monitor was produced there has been a decline in the number of vacant units from four to three leading to a reduction in the amount of vacant floorspace (58% to 53%). There remains a disproportionately high percentage of vacant floorspace due to two large units remaining vacant. One of these, the former Grind All premises, has an outstanding planning application for redevelopment into 7 units of B1/B2/B8 use.

	Total	Vacant	% Vacant
Units	14	3	21
Floorspace	4,630	2,455	53

Within the last twelve months one new occupier has moved into a previously vacant unit in Pitwood Park Industrial Estate.

Use Classes (Left – Units; Right – Floorspace)



Pitwood Park Industrial Estate is predominantly composed of B1(A) and B1(B) and B8 units, accounting for 29%, 22% and 21% respectively. Despite the recent occupier change, B1(B) remains the dominant use of floorspace however, B1(A) has increased from 11% to 16%.

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

Within the last twelve months there has been no development activity within Pitwood Park Industrial Estate. There is currently an outstanding planning permission (14/00709/F) to demolish the existing B2 unit and erect 7 units of B1/B2/B8 use. This would add 220sqm of additional floorspace.

Albert Road North Industrial Estate, Reigate



Albert Road North Industrial Estate

Albert Road North Industrial Estate is predominantly comprised of distribution uses (31%) including Stentor Music Company Ltd; and services (30% units) such as Comtec Computer Consultancy.

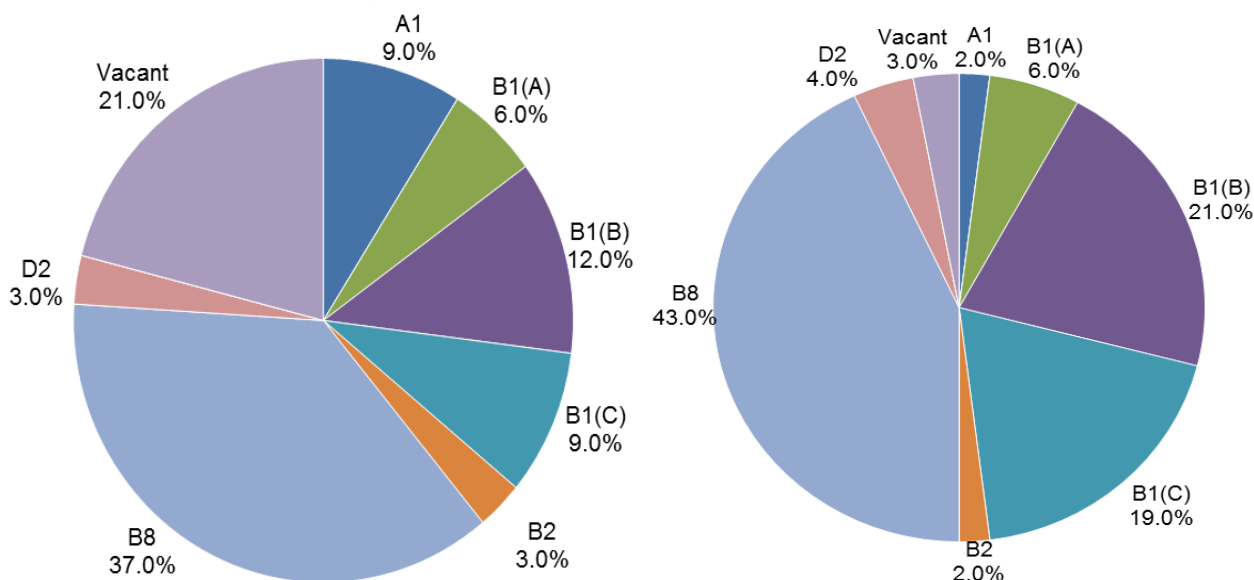
Vacancies & New Occupiers

Since the last monitor was produced the number of vacant units within Albert Road Industrial Estate has increased from 5 to 9 due to the remaining occupiers of Buckland House vacating their premises as Buckland House has planning permission (13/01938/F) to be converted into 14 residential dwellings. This has led to an increase in vacant floorspace from 990sqm to 1,180sqm.

	Total	Vacant	% Vacant
Units	33	9	27
Floorspace	12,935	1,180	9

In the last 12 months Albert Road Industrial Estate has welcomed two new occupiers, one which has moved into a previously vacant unit and one which has moved into a previously occupied unit. It has also seen the expansion of Stentor Music Company into another unit. Reigate Ductwork Manufacturing has also expanding into an adjoining unit.

Use Classes (Left – Units; Right – Floorspace)

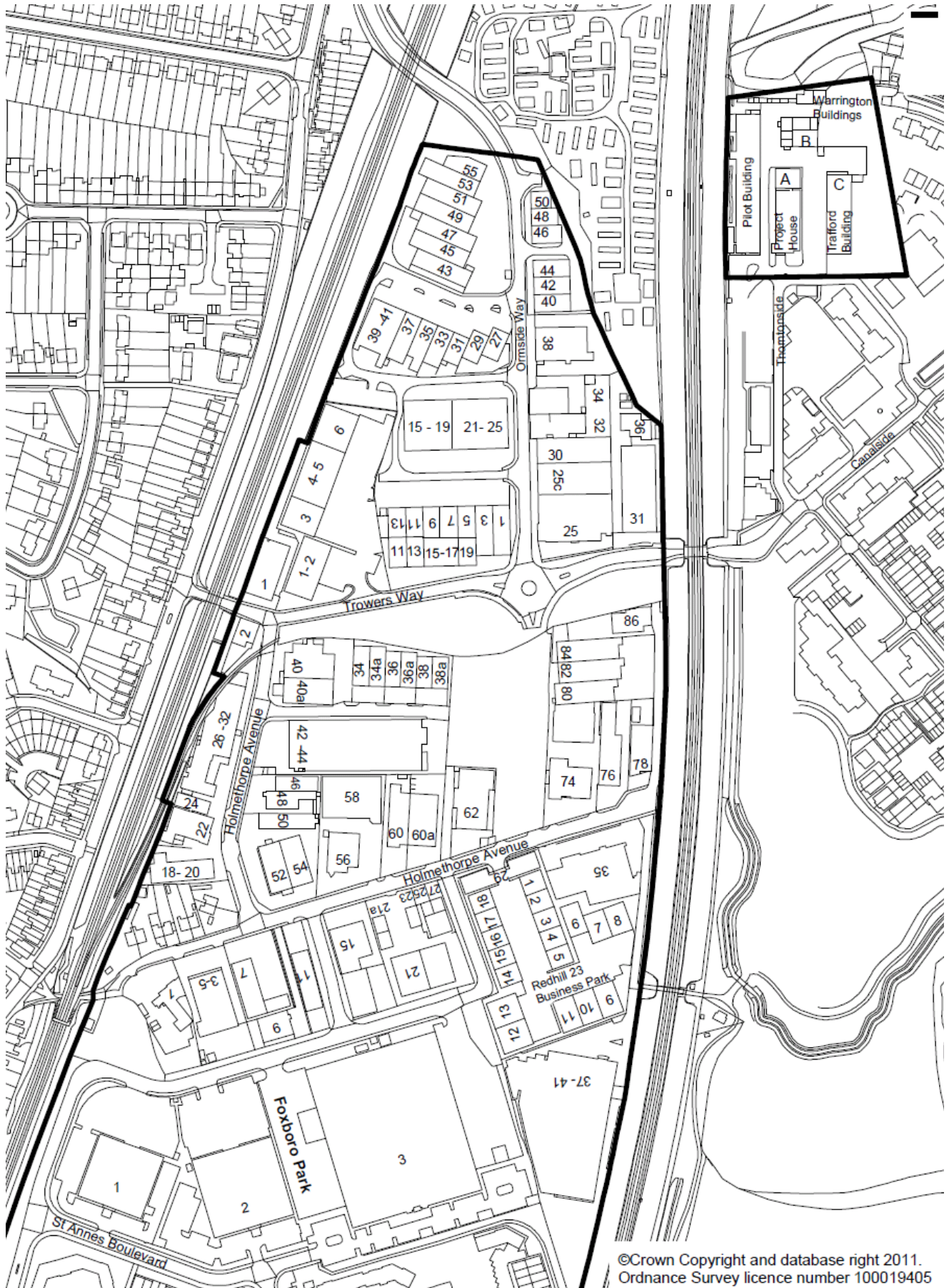


Since the last monitoring period there has been some change to the composition of Albert Road North Industrial Estate due to the remaining occupiers vacating purpose built office suites within Buckland House. B8 remains the dominant use type of Albert Road North, accounting for 37% use and 43% of floorspace within the industrial estate, followed by B1(B) which accounts for 12% use and 21% floorspace. 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

Within the last twelve months there has been no new development. There is currently one outstanding planning application (13/01938/F) for the demolition of the existing office building (Buckland House) and the erection of 14 dwellings reducing commercial floorspace by 962sqm.

Holmethorpe Industrial Estate, Redhill



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Holmethorpe Industrial Estate

Holmethorpe Industrial Estate is predominantly comprised of services (47%) such as Admiral Security Systems, Core Laboratories, and Sussex Auto Care; distribution (16%) for example Furnistore, Howden Joinery and Interlink Express; and manufacturing (16%) including Jayhern Metal Engineers and Stocksigns Ltd.

Vacancies & New Occupiers

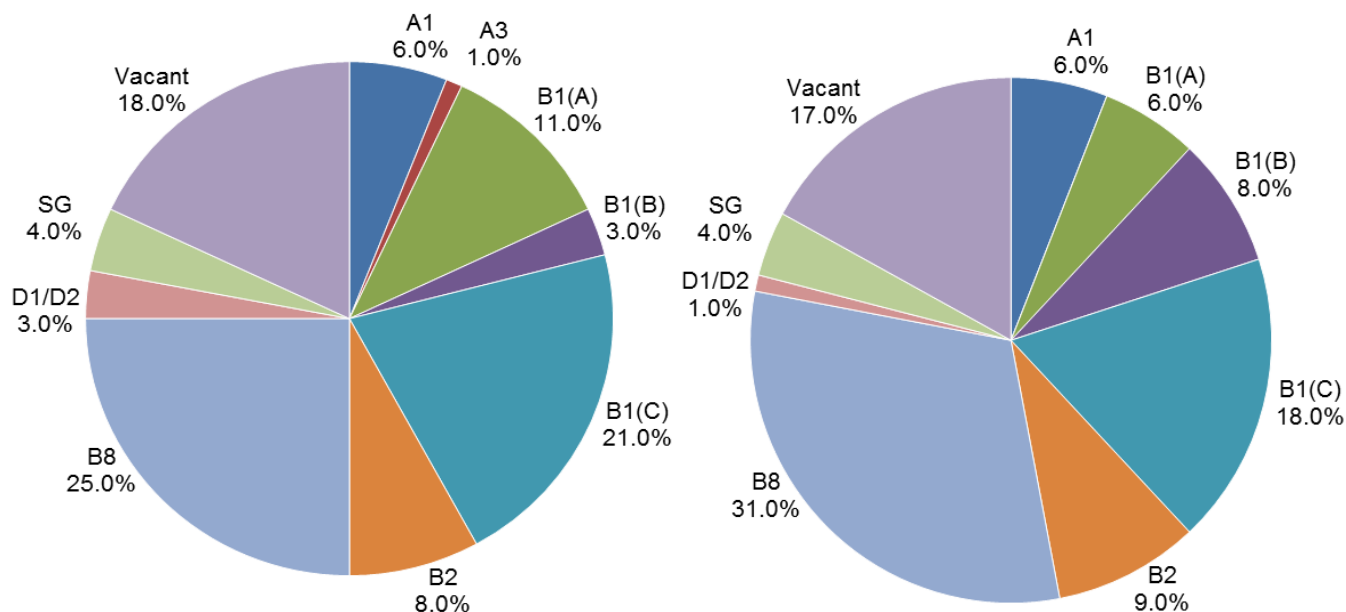
Since the last monitor was produced the number of vacant units has fallen from 36 (23%) to 28 (17%). This has led to a decline in the amount of vacant floorspace from 15,820sqm (19%) to 13,235sqm (16%). As a result, vacancies at Holmethorpe are now only slightly above the Core Strategy Monitoring Target of 15%.

	Total	Vacant	% Vacant
Units	161	28	17
Floorspace	83,224	13,235	16

In the past year 12 new occupiers have moved onto Holmethorpe Industrial Estate, one of which includes an existing occupier relocating to a new premise within the estate. This is a decrease from last year's figure of 15 but still represents a reasonably high level of interest in the estate. Two of the new occupiers moved into previously occupied units whilst 13 moved into previously vacant units. Two vacant units are currently being fitted out suggesting that two new occupiers are moving into the estate shortly.

Since the last monitor was produced there have been three new units completed within the industrial estate: two are newly constructed units and one is due to a subdivision of units. This has led to an increase of 820sqm floorspace.

Use Classes (Left – Units; Right – Floorspace)



Within the last twelve months despite the reduction in the number of vacant units within the Holmethorpe Industrial Estate, the composition remains relatively similar. Warehouse and distribution (B8) remains the dominant use class occupying 25% of all units and 31% of total floorspace, followed by light industrial (B1(C)) which occupies 21% of all units and 18% of total

floorspace. Together these occupy 46% of all units and 49% of total floorspace, a slight increase from 42% of all units and 47% of total floorspace in last years monitor.

Planning and Development Activity

In the last couple of years there has been a notable increase in development proposals at the Holmethorpe Industrial Estate. Within the last twelve months two new units have been constructed on the Holmethorpe Industrial Estate and a further unit has been subdivided to create a new unit. There are currently two planning permissions under construction:

- 14/00470/S73: Modification of planning permission reference number 12/01323/F: Proposed redevelopment of 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 B1, B2 and B8 floorspace
- 14/02270/F: 25 Ormside Way: Installation of industrial roller door and new glass entrance door with glass side panels

There are also a number of outstanding planning permissions:

- 13/01596/CU: 38 Ormside Way: Change of use from B2 to B1(C)/B8
- 13/01972/CU: First Floor 38 Ormside Way: Change of use from B1(C) to B1(A)
- 14/01047/CU: 40A Holmethorpe Avenue: Change of use from B1/B2 to SG

Wells Place, Merstham



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Wells Place Merstham

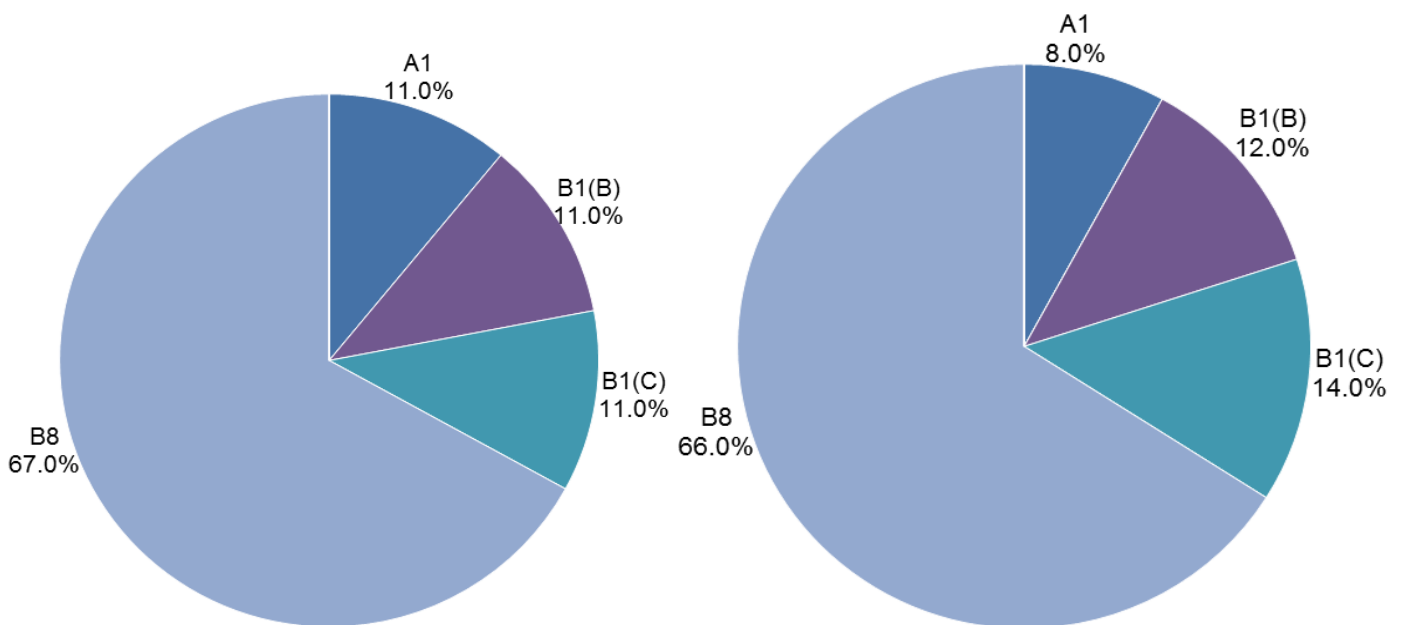
Wells Place Industrial Estate is made up of distribution uses (78% units) including Ricoh Business Solutions and Select Music and Video Distribution; and services (22% units) such as Forbes Direct TV and Video Rental and NSSL Global Satcom Solutions.

Vacancies & New Occupiers

Since the last monitor was produced there has been no change to Wells Place Industrial Estate, there remains no vacant units within the industrial estate.

	Total	Vacant	% Vacant
Units	9	0	0
Floorspace	26,590	0	0

Use Classes (Left – Units; Right – Floorspace)



Wells Place is typified by large purpose built commercial units arranged around a central spine road. Two-thirds of Wells Place industrial estate is dominated by warehouse and distribution (B8) uses.

Since the last monitor was produced there have been no changes to the use and composition of Wells Place Industrial Estate. There are currently no vacant units within the industrial estate.

Planning and Development Activity

Within the last twelve months there has been no new development within Wells Place Industrial Estate, there is currently one outstanding planning permission:

- 12/01352/F: Land Parcel North End and Granville House: Planning permission has been granted to develop an additional B1(C)/B8 unit and extend the existing warehouse occupied by Winterbotham Derby. This would increase commercial floorspace by 2,921sqm.

Reading Arch Road Industrial Area, Redhill



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Reading Arch Road

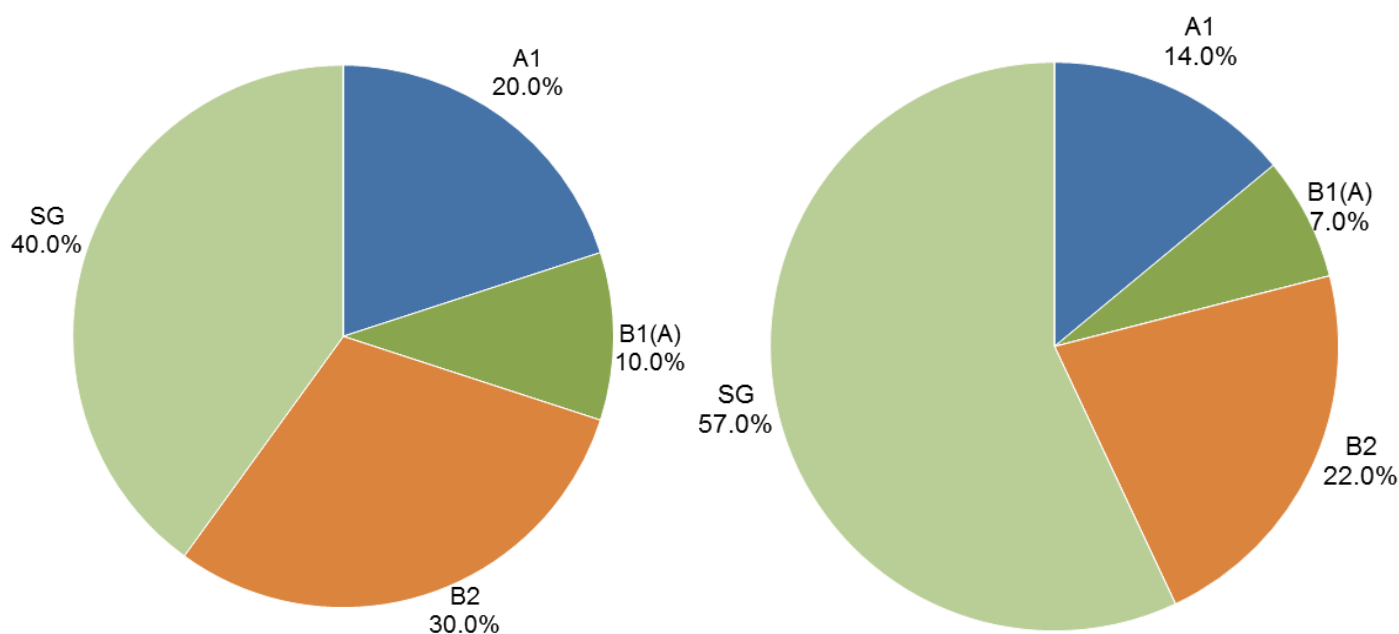
Reading Arch Road Industrial Estate is entirely composed of service uses, a large proportion (78%) of which provides vehicle related services including maintenance, repair, rental and vehicles for sale. Units include Ford, Watling Tyres and Taylors Autos.

Vacancies & New Occupiers

For the second consecutive year there are no vacant units within Reading Arch Road Industrial Estate. Within the last twelve months the only change within the industrial estate is that Redhill Alignment Centre has changed its name to Redhill MOT Centre – the use and floorspace remains the same.

	Total	Vacant	% Vacant
Units	9	0	0
Floorspace	4,160	0	0

Use Classes (Left – Units; Right – Floorspace)



As can be seen SG remains the dominant use class (33% units and 57% floorspace) followed by B2 (34% units and 22% floorspace), this is due to motor/ vehicle related businesses occupying a large number of units. Both use classes account for over three quarters of the total floorspace, a large proportion (45%) 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

Within the last twelve months there has been no development within Reading Arch Road Industrial Estate. There is currently one outstanding planning application (14/00902/F) to extend the premises occupied by Watling Tyres and increase B1(C) floorspace by 45sqm.

Kingsfield Business Centre

Kingsfield Business Centre is predominantly comprised of manufacturing uses (47%) such as Platipus Anchors Ltd and Rivertrace Engineering; distribution (20%) such as Respirex; and services (33%) including Cruisers LTD and Surrey and Borders Partnership.

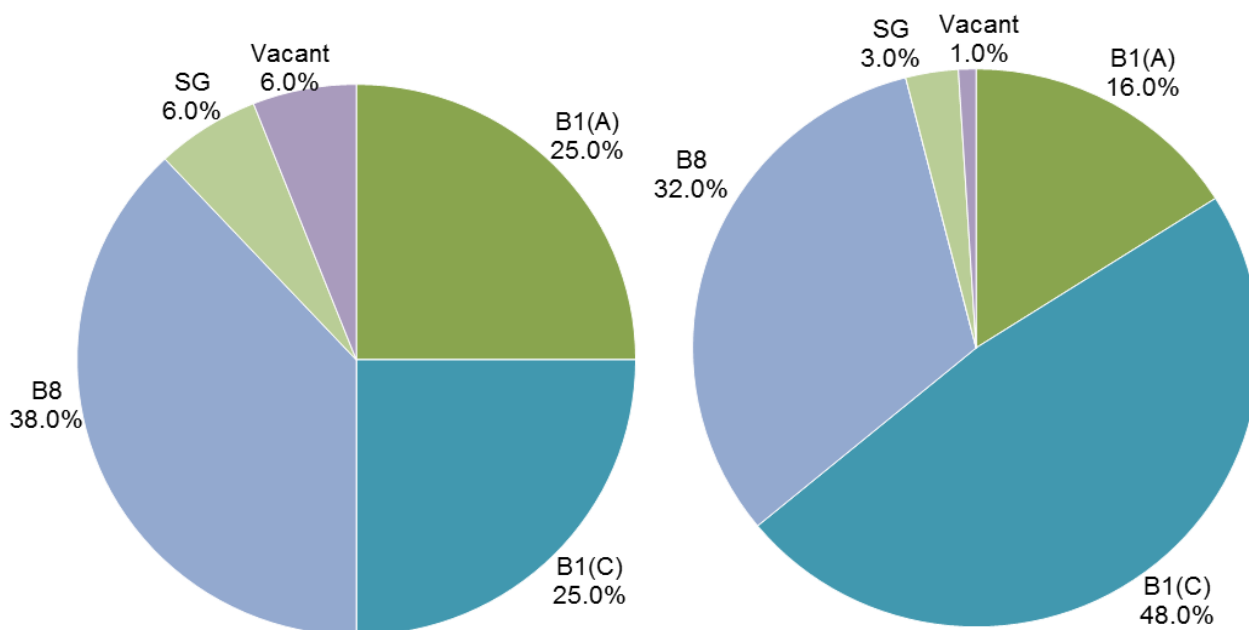
Vacancies & New Occupiers

Since the last monitor was produced there has been one vacancy in a unit previously occupied by Surrey and Borders Partnership. This is the first time there has been a vacant premise in Kingsfield Business Centre since 2007.

	Total	Vacant	% Vacant
Units	16	1	6
Floorspace	8,205	70	1

Within the last twelve months there have been two occupier changes within Kingsfield Business Centre: Carters Framing Services has moved into a previously occupied unit and Respirex have expanded into another previously occupied unit.

Use Classes (Left – Units; Right – Floorspace)



Within the last twelve months there has been some change to the use composition of Kingsfield Business Centre: B1(C) has increased from 19% to 25%; B1(A) has reduced from 31% to 25%; and SG units have reduced from 13% to 6%.

Warehouse and distribution (B8) uses remains the predominant use on the estate, accounting for 38% of units and nearly a third of the estates floorspace, followed by light industrial (B1(C)) which accounts for 25% of units and 48% of floorspace, over half of which is occupied by Respirex.

Kingsfield Business Centre continues to be dominated by two businesses: Surrey and Borders Partnership NHS who since the last monitor have reduced the number of units they occupy from four to three; and Respirex who since the last monitor have increased the number of units they occupy from five to six. When combined they occupy 56% units and 63% of floorspace.

Planning and Development Activity

Since the last monitor was produced there has been no development within Kingsfield Business Centre and there are currently no outstanding planning applications.

Perrywood Business Park, Salfords



Perrywood Industrial Estate

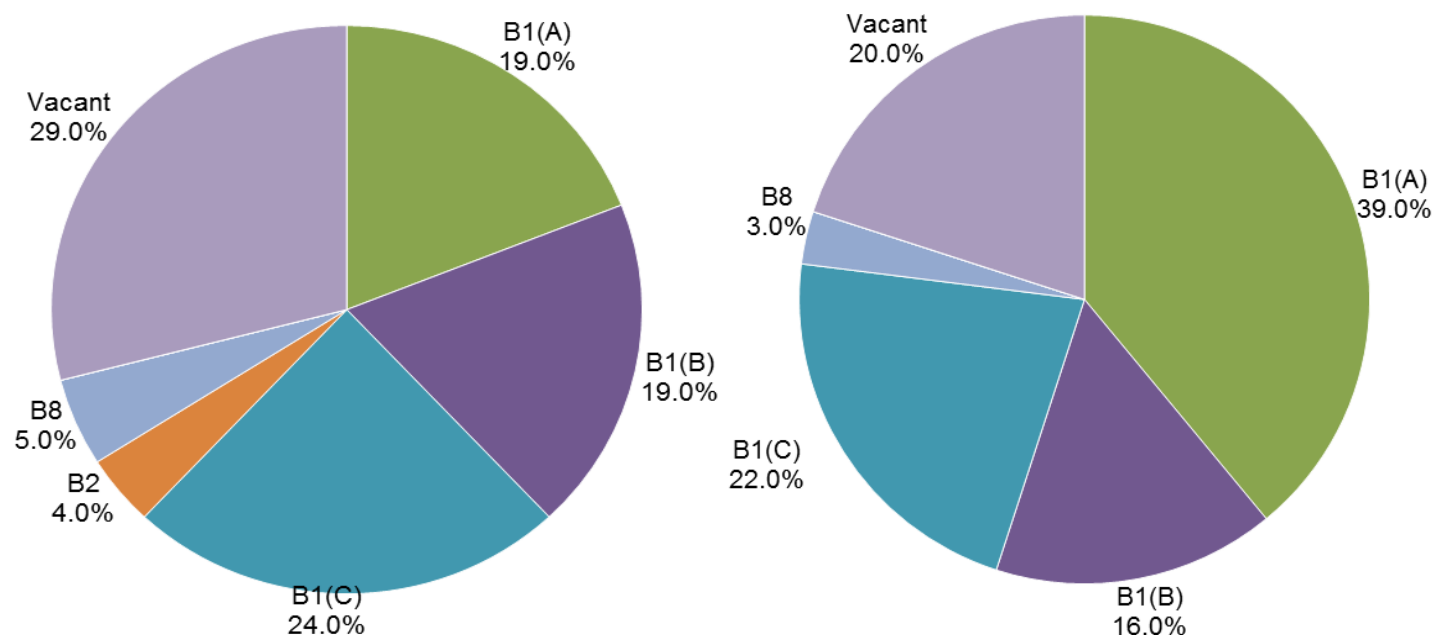
Perrywood Industrial Estate is predominantly comprised of service use (36%) such as AFS Redhill Vehicle Repair Garage and Cubic Transportation Systems; and manufacturing uses (32%) including ATC Machine Components, McCarthy Aircraft Interiors and Tinus Olsen Ltd.

Vacancies & New Occupiers

Since the last monitor was produced the number of vacant premises has remained the same, there are still six vacant premises within Perrywood Industrial Estate. Despite the number of vacant premises remaining the same there have been a number of occupier changes as Clarke Telecom has moved into a previously vacant unit and Acro Aircraft have vacated their premise. This has resulted in an increase in the quantity of vacant floorspace (19% to 21%). It should also be noted that out of the 6 vacant units, 3 units have been vacant for over two years and two units for over one year.

	Total	Vacant	% Vacant
Units	21	6	29
Floorspace	24,690	5,080	21

Use Classes (Left – Units; Right – Floorspace)



Since the last monitor was produced there has been little change to the composition of Perrywood Industrial Estate: B1(C) remains the dominant use class occupying 24% of the total units, followed by B1(B) and B1(A) both occupying 19% of total units.

In terms of floorspace B1(A) remains the dominant use type occupying 39% of total floorspace, followed by B1(C) occupying 22% of total floorspace. Since the last monitor was produced B1(A) has increased from 36% to 39% and B1(C) has declined to 22%.

Compared to the borough's other industrial estates, Perrywood Park still has the lowest representations of B8 uses (warehouse & distribution), as the centre is predominately occupied by service based businesses.

Planning and Development Activity

Since the last monitor was produced there has been no development within Perrywood Business Park and there are currently no outstanding planning applications.

Salfords Industrial Estate, Salfords



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Salfords Industrial Estate

Salfords Industrial Estate is predominantly comprised of distribution uses (44%) such as Arcadia Pet-Care Lighting, Photo Me Photographic Equipment and Soft Line UK Ltd Technology/ Software Consultancy; services (26%) for example Bookers Cash and Carry, Success Photography and Lucion Environmental; and manufacturing (11%) including AEL Crystals, Bytec Group Ltd and Redline CNC.

Vacancies & New Occupiers

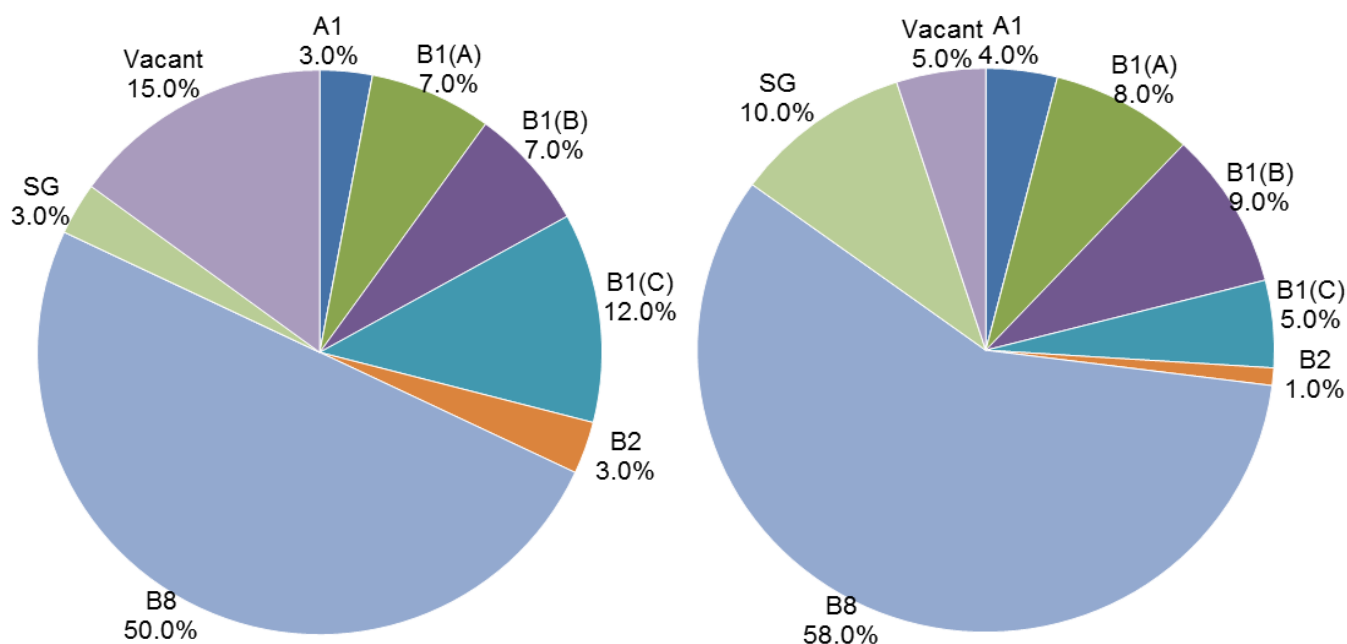
Since the last monitor was produced there have been a number of occupier changes to Salfords Industrial Estate which has resulted in the number of vacant units declining from 16 to 14 (15%). However, it should be noted that 3 are newly vacant units and 11 have been vacant for more than one year.

The percentage of vacant floorspace has declined hugely from 14% to 6% due to three large previously vacant premises now being occupied by Fusion Partitions, Pilgrims Group Ltd and Selco. Together these occupy 10% of the floorspace of the entire industrial estate.

	Total	Vacant	% Vacant
Units	95	14	15
Floorspace	81,826	4,555	6

Since the last monitor was produced four new occupiers (the School Photography Company, Spaces Event Security Services, Pilgrims Group Ltd and Selco) have moved into the industrial estate, one occupier (Fusion Partitions) has relocated and another occupier (Moorhouse Interior Shopfitting) has expanded. Of these new occupiers, three have moved into the IO Centre which has significantly reduced the amount of vacant floorspace within the IO Centre (from 2,140 to 690sqm). Work is currently being completed to convert two further vacant units into Surrey Fire Station which will lead to a further reduction in commercial floorspace. Conversely, two units have moved out of Orchard Business Centre increasing the number of vacant units to 5 out of 7.

Use Classes (Left – Units; Right – Floorspace)



Given its strategic location on the A23 corridor, it is perhaps expected that Salfords is dominated by warehouse and distribution (B8) uses which makes up half of the estates units and 58% of floorspace. The last 12 months has seen an increase in the number of warehouse and distribution

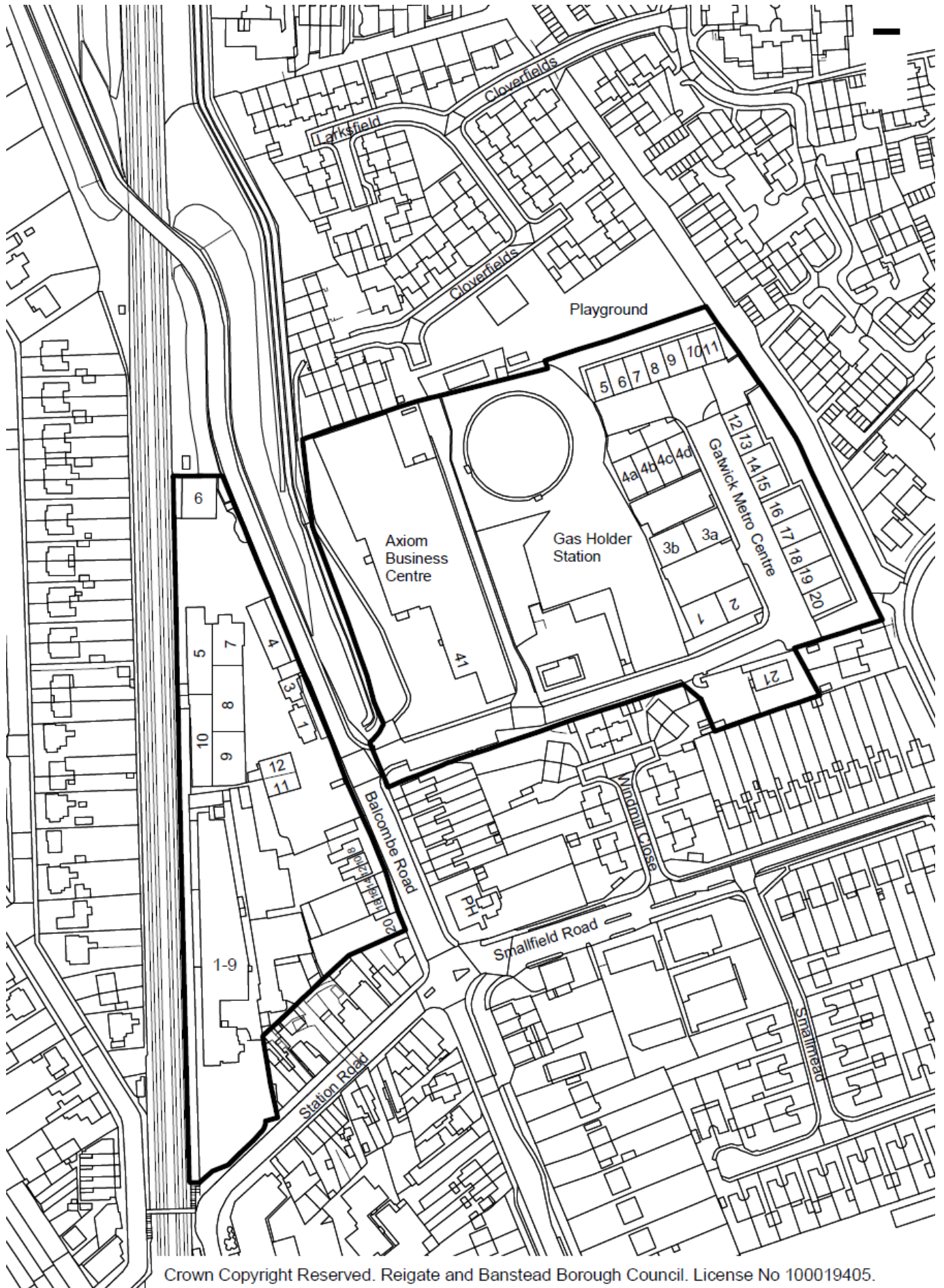
businesses move into the estate, further increasing B8 floorspace to 58% from 51%. Against this the estate continues to have a varied make-up consisting of a further 6 different uses including A1, B1(A) and B1(b).

Planning and Development Activity

Within the last twelve months no new development has been completed within Salfords Industrial Estate however, work is currently undergoing to convert units 14 and 15 of the IO Centre into a fire station (B8 to SG).

Currently, there is an outstanding planning permission (13/00555/CU) for the change of use from B2 to B8 for unit 3 Orchard Business Park.

Balcombe Road Industrial Area, Horley



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Balcombe Road Industrial Estate

Balcombe Road Industrial Estate is predominantly comprised of services (63%) such as Ascendit Lifts Ltd; distribution (21%) for example Newick Packers; and manufacturing (12%) including ISI Partitions.

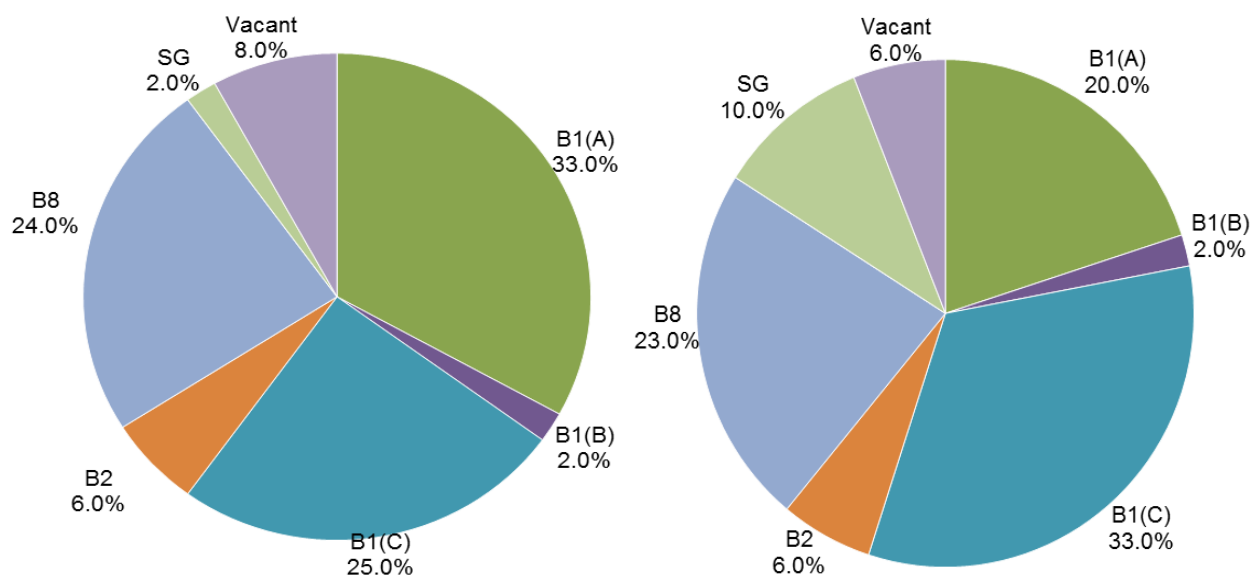
Vacancies & New Occupiers

Since the last monitor was produced the vacancy rate has remained the same, 8%. There are still four vacant units, three of which were vacant in the previous monitor. The vacant floorspace has however increased from 865sqm to 1,080 (5% to 6%) due to a smaller previously vacant unit being occupied and a larger previously occupied unit becoming vacant.

	Total	Vacant	% Vacant
Units	51	4	8
Floorspace	18,285	1,080	6

Within the last twelve months there have been a number of occupier changes: four occupiers have moved out of the estate, five new occupiers have moved into the estate and one occupier has moved premises. There has also been an increase in the number of units as one previously occupied unit has split into two; both of these new units are occupied.

Use Classes (Left – Units; Right – Floorspace)



Balcombe Road industrial estate comprises of three separate areas: Gatwick Metro Centre, Axiom Business Centre and Bridge Industrial estate. 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 is predominantly made up of B1(A) (33%), B1(C) (25%) and B8 (24%) units.

In terms of floorspace, B1(C) use accounts for a third of the total floorspace and includes several small manufacturing based industries such as Oldbury Engineering; B8 use occupies nearly a quarter of floorspace and includes many airport related businesses such as DMS Air freight; and B1(A) occupies almost a fifth of the estates floorspace and contains many specialist office based services such as graphic design and marketing.

Planning and Development Activity

Since the last monitor was produced there has been no new development within Balcombe Road, there is currently one outstanding planning permission (13/01906/F) for change of use from A1 to B2 for 18 Gatwick Metro Centre.

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 500sqm)
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 500sqm)
B8	Use for Storage or Distribution.	B1 (where no more than 500sqm)
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

Temporary permitted development rights have been introduced in respect of a number of potential changes of use between A1, A2, A3, A4, A5, B1, D1 and D2 uses. These rights permit the use to change for a maximum period of two years and subject to a floorspace threshold of 150qm.

Permitted development rights to allow the change of use from A1/A2 to C3 (residential) have also been introduced. These rights are subject to a prior approval process to ensure that the proposed change would not result in inadequate provision of A1 or A2 services or harm the sustainability of a shopping area. Floorspace is limited to 150sqm.

Permitted developer rights also exist, until May 2016, for the change of use from B1(a) to C3 (residential) subject to a prior approval process.

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:

Commercial Development

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 Socio-Economic Information

These publications are available on the Council website:

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

Search for: "*plan monitoring*":

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

Planning Policy Team

Tel: 01737 276000

Email: LDF@reigate-banstead.gov.uk