

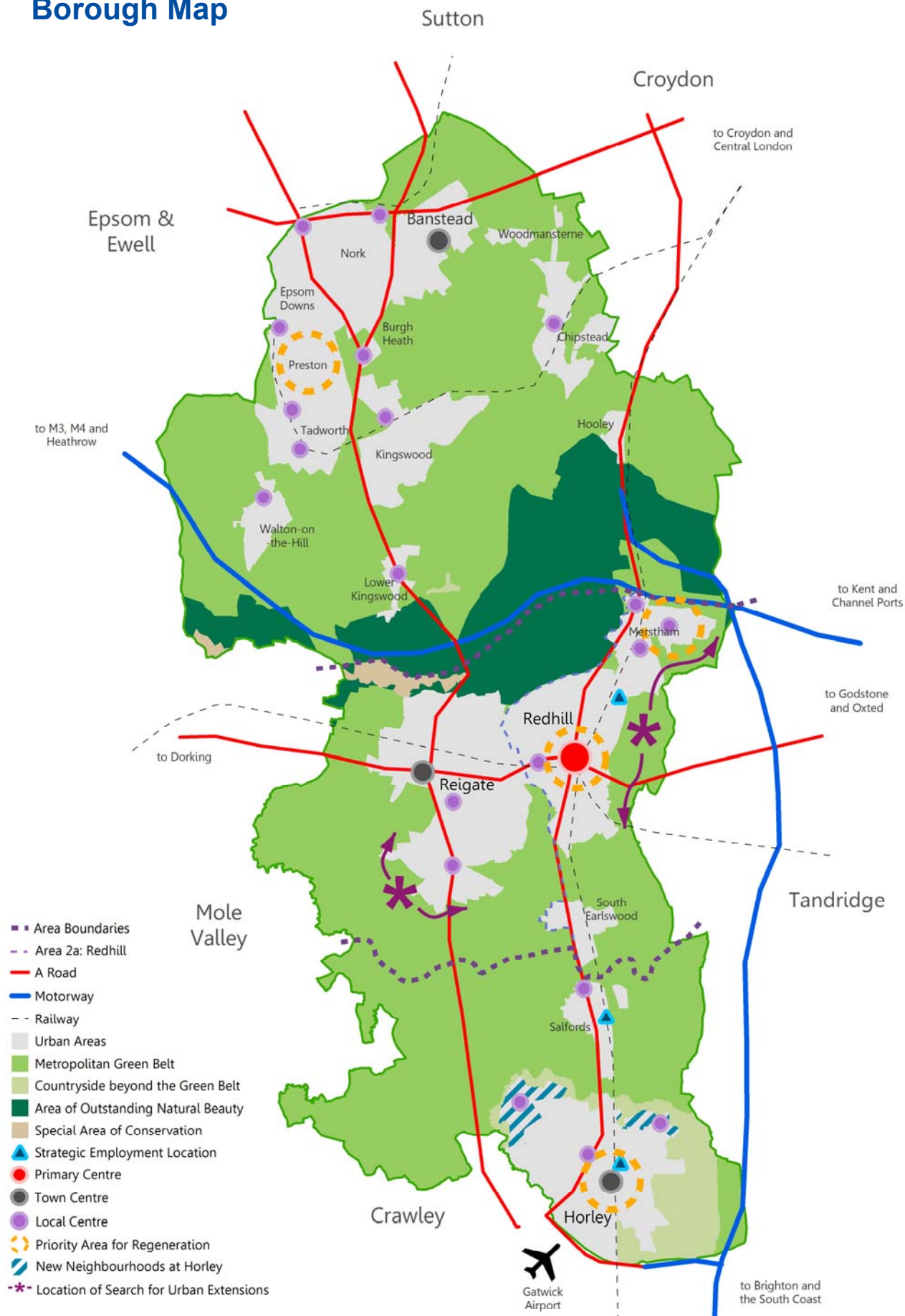


Industrial Estates Monitor

March 2020

Reigate & Banstead

Borough Map



Industrial Estates Monitor

March 2020

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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 November 2019. 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 the Council's Development Management Team. While every care has been taken to ensure that the information in this Monitor is accurate, the 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 Council's Development Plan is comprised of the Core Strategy adopted in July 2014 and reviewed in July 2019 and the Development Management Plan (DMP) adopted in September 2019. The Development Plan recognises the important role industrial estates play in providing employment areas and valuable services to the business and residential community.

Within the borough there are seven industrial estates: four principal employment areas and three local employment areas.

Principal Employment Areas	Local Employment Areas
Holmethorpe Industrial Estate, Redhill	Pitwood Park Industrial Estate, Tadworth
Wells Place Industrial Estate, Redhill	Kingsfield Business Centre, Redhill
Perrywood Business Park, Redhill	Balcombe Road Industrial Area (Bridge Industrial Estate and Gatwick Metro Centre), Horley
Salfords Industrial Estate, Redhill	

The principal employment areas are locations of strategic importance due to their size, accessibility and commercial offer. They are areas that are particularly suited to offices, industrial, storage and distribution uses.

The local employment areas provide more local accommodation for businesses. They provide an important supply of smaller, more affordable accommodation for small businesses in the borough. Their accommodation is particularly suited to smaller scale industrial and distribution uses, offices, financial and professional services and other employment generating uses (excluding all A use classes other than A2 use).

Relevant Local Policies and Indicators

Policy	Monitoring Target
EMP1 'Principal Employment Areas'	Proposals in Principal Employment Areas will be generally only permitted when they support the identified potential for intensification of these areas. Supporting the continued role of these Principal Employment Areas and acknowledging their role to the local economy.
EMP2 'Local Employment'	Generally permit proposals for industrial and distribution uses, offices, financial and professional services and other employment-generating

Areas'	services with a greater degree of flexibility in these areas than in Principal Employment Areas to improve viability.
SO19, SO20	To ensure the borough remain an attractive business location and to protect the existence of an adequate employment accommodation for business needs through monitoring vacancy levels.

The purpose of monitoring industrial estates is to:

- Improve knowledge 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 in the borough's Local Plan documents and provide an up-to-date evidence base to support decision-making on planning application

Overall Trends – Key Messages

UK Trends

In 2019, the industrial and logistics market continued to be resilient despite many geopolitical and economic headwinds. According to Savills UK, investment in distribution warehouses reached £3.87bn in 2019, representing the highest four year rolling average ever recorded. Cushman & Wakefield expect that for 2020, continued ecommerce growth will ensure that logistics is one of the best performing UK commercial real estate sectors. They however note that while being traditionally a sector defined by large warehouses in out-of-town locations, developers of late have tended to focus on more densely populated areas where lack of available land and under supply of suitable land is typical.

Cushman and Wakefield note that in 2019, large units over 100,000sqft continued to be a particular focus with national take up reaching 34.21million sqft in 2019, a 31% increase on 2018. Units between 100 and 200,000sqft remained the most sought after, accounting for 35% of all of the transactions and there were less transactions for units over 500,000sqft. Unlike in previous years, no single sector or occupier dominated the total take-up in 2019. While the level of online retail has continued to grow in the UK, the pace of growth has started to slow in recent years. Nationwide supply has risen in 2019 and now stands at 35.79m sqft.

Borough Trends

- **Overview** – The borough's industrial estates contain 368 business premises and provide over 247,000sqm of floorspace.
- **New Occupiers** – A total of 11 new occupiers moved into the industrial estates in the last year, of which 6 took over previously vacant units, whilst 5 moved into previously occupied units. Holmethorpe had the highest take up at 6 units, whilst Kingsfield Business Park, Perrywood, Pitwood Park and Wells place had no new occupiers moving in. Over the past year the total take-up was 5,022sqm, out of which 2,728sqm represented floorspace previously occupied by another business and 2,294sqm floorspace that was previously vacant. Against this, 3,470sqm of floorspace became newly vacant.
- **Vacancies** – Across the borough's seven industrial estates there are 31 vacant units representing 13,465sqm of vacant floorspace. Vacancy rates remain below the Core Strategy monitoring target of 15%. The majority of vacant units came from the borough's two largest estates, Holmethorpe and Salfords, with 10 units and 15 units respectively, whilst Wells Place and Balcombe Road remain fully occupied.

- **Planning Permissions** –There are currently 8 planning permissions across the industrial estates, that have either not been started or are under construction. These permissions have the potential to deliver 23,775sqm of additional net floorspace.
- **Land Use Trends** – B8 (warehouse/distribution) use class has remained the dominant use across the industrial estates, accounting for 37% of the units, followed by B1(c) light industrial use at 20%. B8 also dominates in terms of floorspace, accounting for 44% of the total, this is perhaps unsurprising as the nature of warehouse/ distribution businesses means they tend to require larger premises.

Breakdown of Use Classes

Table 1 Breakdown of Use Classes in the Industrial Estates (2020) - 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	4	1	1	3	0	0	0	1	14
Holmethorpe	7	1	20	6	36	15	52	2	2	8	10	159
Wells Place	1	0	0	1	0	0	8	0	0	0	0	10
Kingsfield Business Centre	0	0	1	0	3	1	5	0	0	2	4	16
Perrywood Business Park	0	0	6	4	7	1	3	0	0	0	1	22
Salfords	3	0	5	5	12	3	48	0	0	5	15	96
Balcombe Road	0	0	17	1	13	3	16	0	0	1	0	51
Total	11	1	53	21	72	24	135	2	2	16	31	368
Percentage	3	0.3	14.4	5.7	19.6	6.5	36.7	0.5	0.5	4.3	8.4	100.0

Table 2 Breakdown of Use Classes in the Industrial Estates (2020) - Floorspace sqm

Industrial Estate	A1	A3	B1(a)	B1(b)	B1(c)	B2	B8	D1	D2	SG	Vacant	Total
Pitwood Park	0	0	755	1,055	120	740	460	0	0	0	1,500	4,630
Holmethorpe	3,535	56	7,049	6,930	15,159	7,896	30,805	165	1,195	4,688	3,910	81,388
Wells Place	2,210	0	0	3,070	0	0	22,704	0	0	0	0	27,984
Kingsfield Business Centre	0	0	340	0	1,825	2,118	2,355	0	0	535	1,080	8,253
Perrywood Business Park	0	0	11,493	3,490	6,335	105	2,753	0	0	0	515	24,690
Salfords	3,315	0	5,761	6,490	4,333	675	45,917	0	0	8,875	6,460	81,826
Balcombe Road	0	0	3,690	375	6,590	930	4,765	0	0	1,935	0	18,285
	9,060	56	29,088	21,410	34,362	12,464	109,759	165	1,195		13,465	247,056
Percentage	3.7	0.0	11.8	8.7	13.9	5.0	44.4	0.1	0.5	6.5	5.4	100.0

New Occupiers & Vacancies

New Occupiers

Within this monitoring period, 11 new businesses have moved into the borough's industrial estates, 6 of these new occupiers took over previously vacant units and 5 moved into units previously occupied by other businesses. Against this, 8 units previously occupied have become vacant. 23 units that were vacant in the previous monitoring period remain vacant.

Table 3 New Occupiers and Take-Up (2020) – Units

	New Occupiers – Previously:		New Development	New Vacancies
	Vacant Unit	Occupied Unit		
Pitwood Park	0	0	0	0
Holmethorpe	4	2	0	5
Wells Place	0	0	0	0
Kingsfield	0	0	0	0
Salfords	2	2	0	3
Perrywood	0	0	0	0
Balcombe Road	0	1	0	0
Total	6	5	0	8

Development Activity

There are currently 8 planning permissions across the industrial estates that have either not been started or are under construction. These permissions have the potential to deliver 23,775sqm of additional net floorspace.

Most notable developments include the redevelopment of the former Philips Research Laboratory in Salfords, resulting in an additional 15,831sqm of commercial space and the redevelopment of the former laboratory unit in Pitwood Park, resulting in a loss of 1,579sqm of employment floorspace. Both are currently under construction and works are anticipated to be completed shortly.

Vacancy Trends

The table below shows the long-term vacancy trend for each of the industrial estates. The figures show that within this monitoring period for most of the industrial estates, vacancy rates have either been retained or fallen, with the exception of the Salfords Industrial Estate where the rate has slightly increased (from 14.6% to 15.6%). Kingsfield Business park remains the only estate in the borough with a vacancy rate over the 15.0% Core Strategy monitoring target which is due to the departure of the Surrey & Sussex NHS trust who formerly occupied all of the currently vacant units.

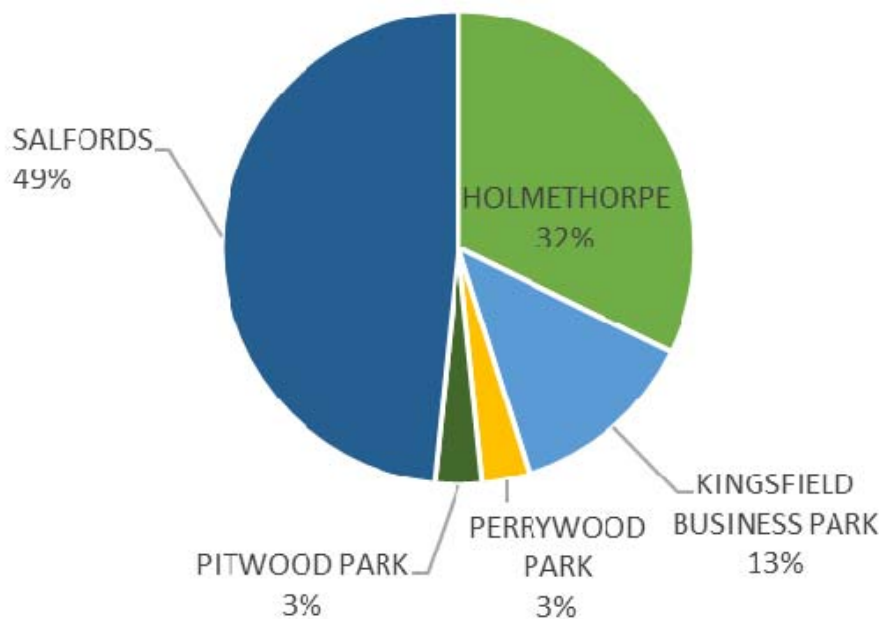
Table 4 Individual Estate Vacancy Trends (2012 – 2020) – Percentage of Units

	2012	2013	2014	2015	2016	2017	2018	2019	2020
Pitwood Park	7.7	14.3	28.6	21.4	14.3	7.1	7.1	7.1	7.1
Holmethorpe	16.2	21.8	23.1	17.4	12.2	13.3	11.2	7.1	6.3*
Wells Place	11.1	11.1	0.0	0.0	11.1	0.0	0.0	0.0	0.0
Kingsfield	0.0	0.0	0.0	6.3	12.5	12.5	12.5	25.0	25
Salfords	20.2	20.0	16.8	14.7	12.5	11.5	19.8	14.6	15.6
Perrywood	9.5	19.0	28.6	28.6	14.3	9.1	4.5	4.5	4.5
Balcombe	4.8	2.0	8.0	7.8	2.0	9.8	9.8	2.0	0.0
Borough-wide	14.0	16.6	18.6	15.6	10.4	10.9	11.7	7.8	8.4

* DMP reduced the extent of the Holmethorpe Industrial Estate

The amount of vacant floorspace varies across each of the individual industrial estates – of the total vacant floorspace, 48% is in Salfords, followed by 29% in Holmethorpe, which is somewhat unsurprising given that these are the two largest industrial estates in the borough accountable for two-thirds of the total floorspace in the borough's industrial estates. Conversely, Wells Place and Balcombe Road are the only industrial estates in the borough to have no vacant floorspace.

Figure 1 Percentage of Total Vacant Units by Industrial Estate (2020)



Use Classes Trends

Employment uses (B1, B2 and B8) account for the greatest proportion of the units (83% of the total units, 90% of the occupied units). Specifically, B8 warehouse and distribution use class accounts for 37% of the units, followed by B1(c) light industrial use at 20% and B1 at 40%.

In terms of floorspace, B8 warehouse and distribution also dominates, accounting for 44% of the total floorspace in the borough's industrial estates (46% of the occupied floorspace). This is perhaps unsurprising as the nature of warehouse/ distribution businesses means they tend to require larger premises.

Figure 2 Use Class Breakdown (2020) – Left: Units; Right: Floorspace

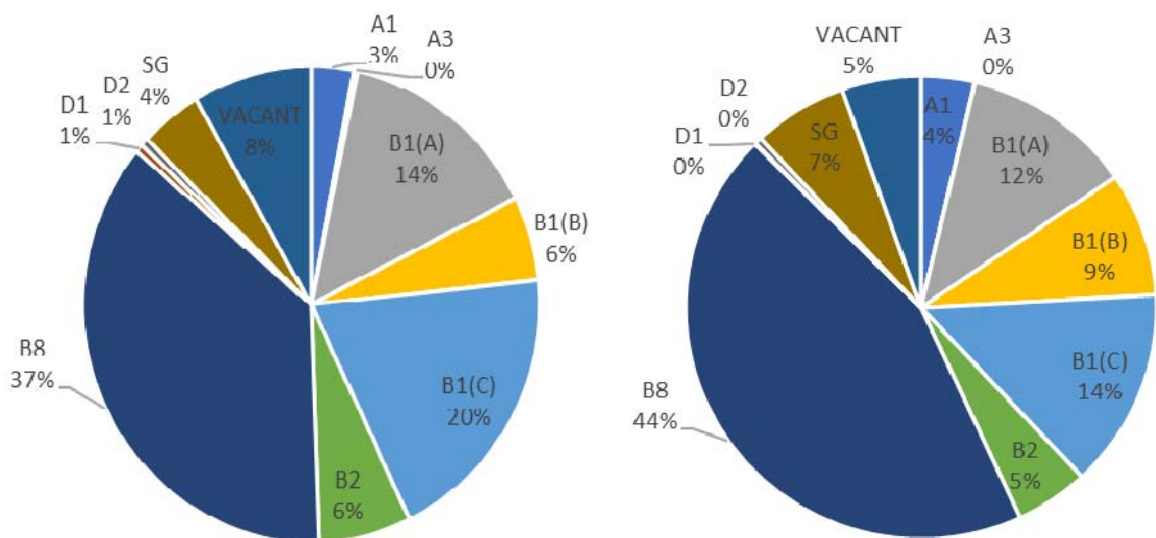
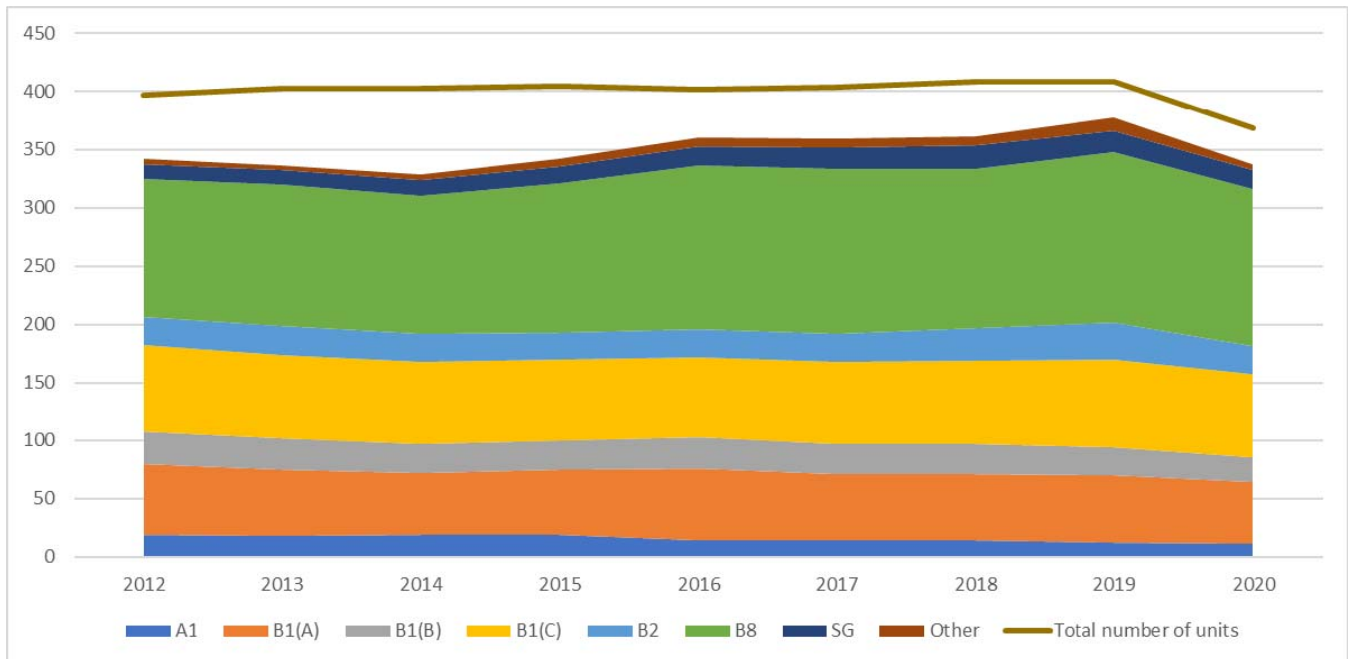


Figure 5 shows the long-term use class trend across the combined industrial estates¹. The growth in and move towards B8 warehouse & distribution type uses is apparent with the proportion of such uses rising from around 30% in 2012 to a current level of 37%. Against this light industrial B1(c) and office B1(a) uses have remained stable (respectively around 19% and 14%) since 2012, representing the second and third main uses.

Figure 3 Use Class Trends (2012-2020)



¹ This includes the DMP amendments to designated Employment Areas since 2020.

Individual Estate Analysis

Pitwood Park Industrial Estate, Tadworth



New Occupiers & Vacancies

Within the last 12 months, there has been no occupier changes and the proportion of vacant units and floorspace remain unchanged.

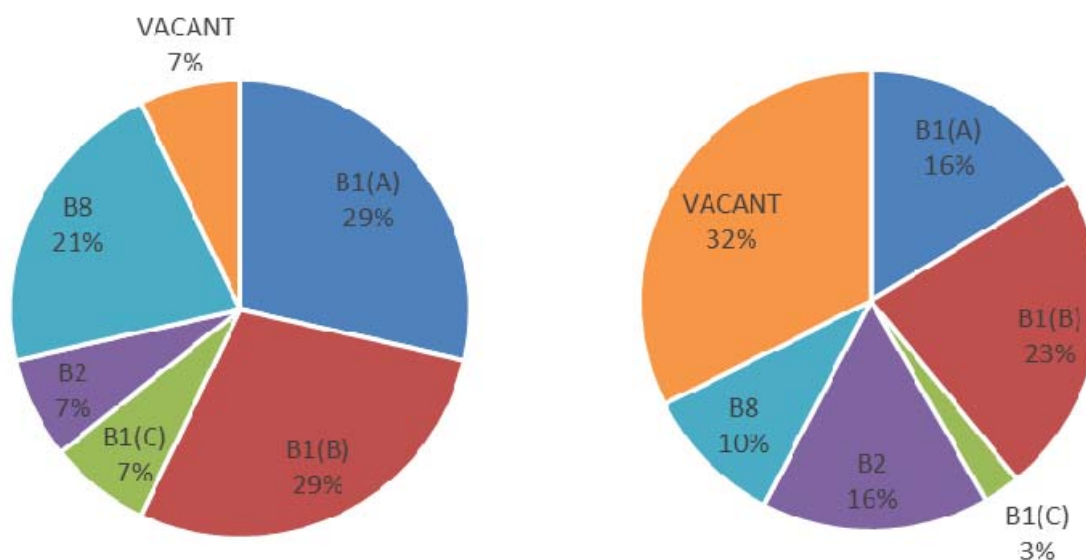
There remains a disproportionately high percentage of vacant floorspace due to the former ISP Laboratory unit remaining vacant (1,500sqm). Planning permission has been granted for the redevelopment of this unit to housing.

	Total	Vacant	% Vacant
Units	14	1	7%
Floorspace	4,630	1,500	32%

Services continue to be the predominant use, accounting for 36% of the units and 25% of the floorspace, followed closely by manufacturing and storage & distribution (28% of the units and 30% of the floorspace, and 29% of the units and 12% of the floorspace respectively).

Office, research and storage use classes (B1(a), B1(b) and B8) account for the greatest proportion of units (79%) and floorspace (49%). Industrial B1(c) and B2 uses only account for 14% of units and 19% of floorspace, potentially due to the estate's location in a predominantly residential area.

Use Classes (Left – Units, Right – Floorspace)



Planning and Development Activity

There are currently two planning permissions:

Planning permission 17/01041/F to build a storage unit on site of unit 4 & 4a is currently under

construction. This will add a further 300sqm of employment floorspace.

Planning permission 18/01156/F has been granted to build 25 dwellings on site of the former laboratory unit. This permission is currently under construction and will result in 1,579sqm loss employment floorspace.

Holmethorpe Industrial Estate, Redhill



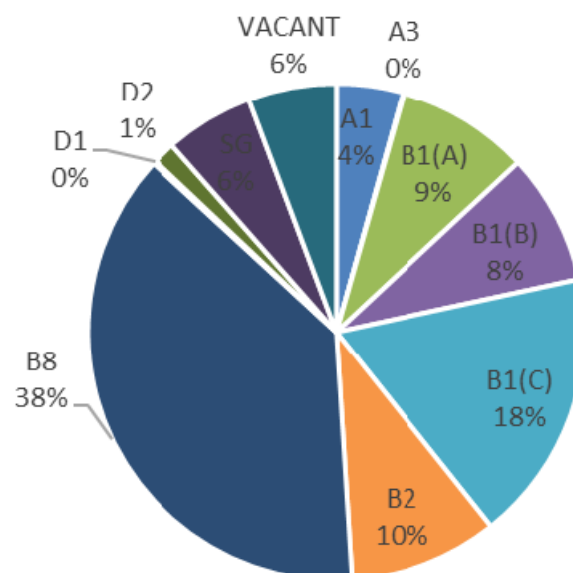
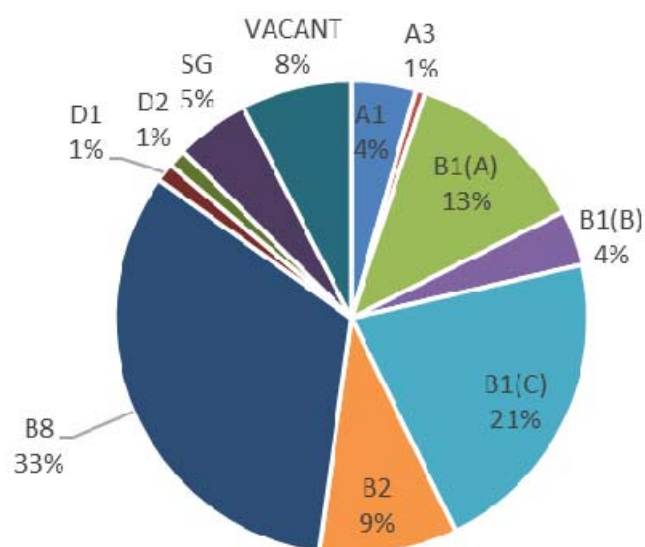
New Occupiers & Vacancies

During this monitoring period, 6 occupiers have moved into the Holmethorpe Industrial Estate (four of which have moved into previously vacant units). In total, 10 units are vacant. The vacancy rate however remains considerably below the Core Strategy monitoring target of 15%.

	Total	Vacant	% Vacant
Units	159	10	6.3%
Floorspace	81,388	3,910	4.8%

Holmethorpe is the largest industrial estate in the borough. Despite changes in occupiers and vacancies, the composition has remained broadly similar. Combined warehouse and distribution (B8) and light industrial (B1(c)) account for just over a half of the units and floorspace.

Use Classes (Left – Units; Right – Floorspace)



Planning and Development Activity

There are currently two outstanding planning permissions in the industrial estate:

Planning permission 18/01049/F for the demolition of the existing unit and construction of two new commercial units at 35 Holmethorpe Avenue, resulting in overall net loss of 300sqm of B1(C) floorspace. Work has not yet started.

Planning permission 19/00016/F for a rear extension to an office block. The proposal would increase B1(a) floorspace by 69sqm. The permission has not yet been implemented.

Wells Place, Merstham



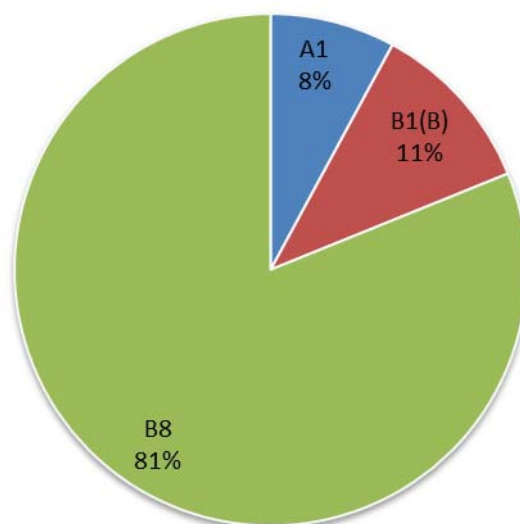
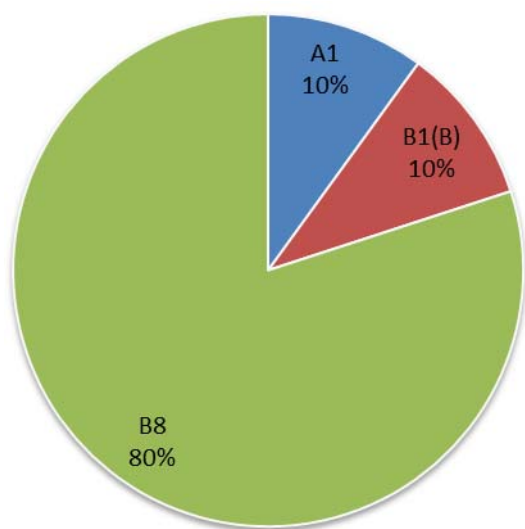
New Occupiers & Vacancies

During this monitoring period, there has been no changes in occupiers. The estate remains fully occupied.

	Total	Vacant	% Vacant
Units	10	0	0%
Floorspace	27,984	0	0%

Wells Place is typified by large purpose built commercial units arranged around a central spine road. The estate is dominated by warehouse and distribution use (B8), with around four fifths of the units and floorspace falling within this use class.

Use Classes (Left – Units; Right – Floorspace)



Planning and Development Activity

There are two live planning permissions (12/01352/F and 18/01072/F) which will provide an additional 4,604sqm of commercial accommodation (B1b, B1c and B8 accommodation).

Kingsfield Business Centre, Redhill



New Occupiers & Vacancies

There have been no changes in occupiers since the last monitoring period. Since the departure of Surrey Borders & Partnership from the estate last year, the four units they formerly occupied remain vacant.

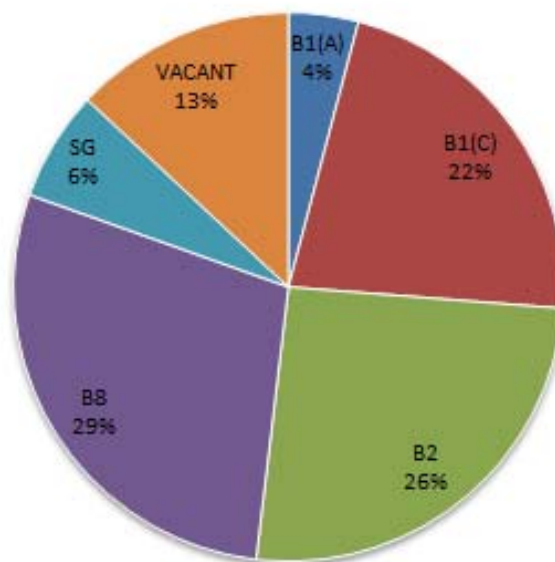
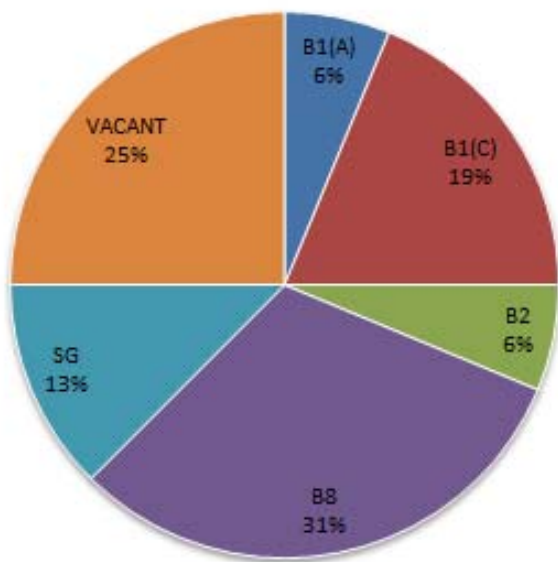
	Total	Vacant	% Vacant
Units	16	4	25%
Floorspace	8,253	1,080	13%

Respirex continues to dominate the estate, occupying over half of the occupied floorspace in the estate (53%) and a third of the units (33%).

Warehouse and distribution (B8) accounts for 31% of the units and 29% of floorspace (41% and 33% of the occupied units and floorspace).

Industrial use (B1(c) & B2) accounts for 25% of units and 48% of floorspace (33% of the occupied units and 55% of the occupied floorspace).

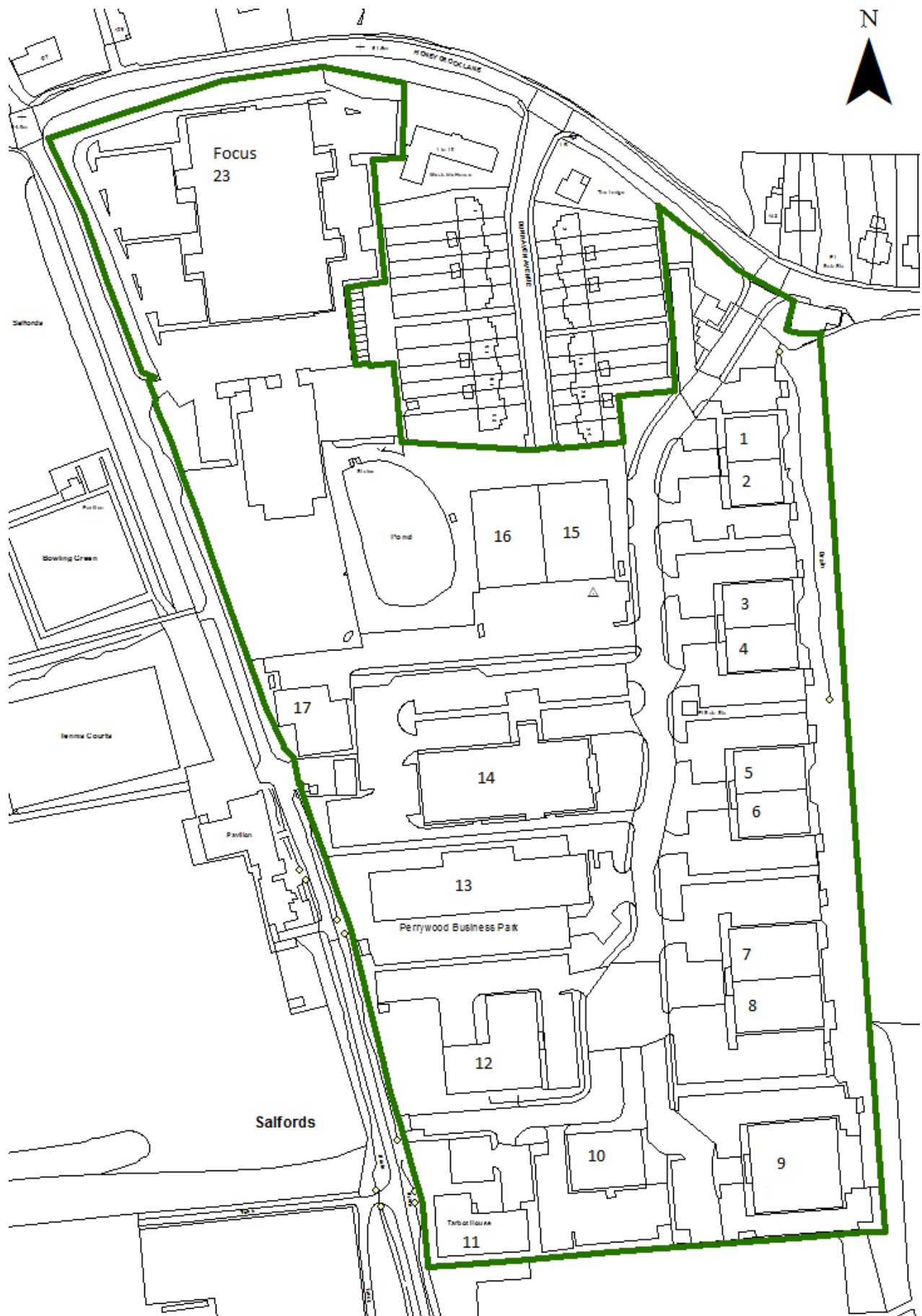
Use Classes (Left – Units; Right – Floorspace)



Planning and Development Activity

Planning application 19/01605/F for the residential redevelopment of the units formerly occupied by Surrey Borders & Partnership is currently awaiting determination. This would lead to a loss of 1,080sqm of B1(A) floorspace.

Perrywood Business Park, Salfords



New Occupiers & Vacancies

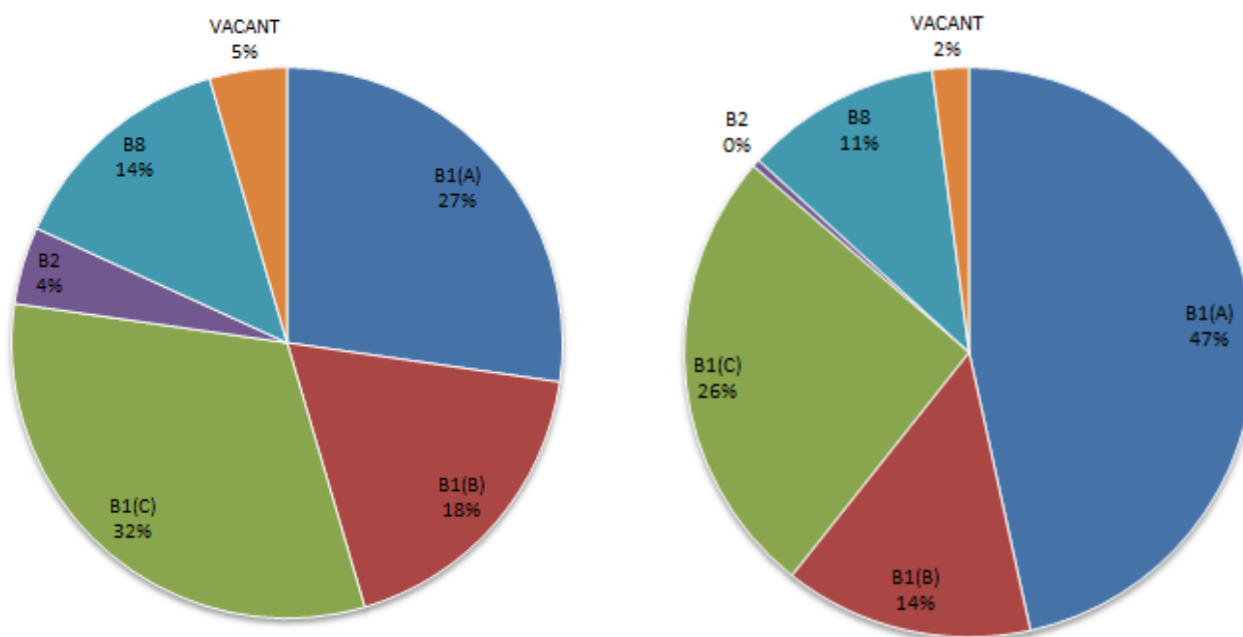
Over the course of the monitoring period, there have been no occupier changes.

	Total	Vacant	% Vacant
Units	22	1	5%
Floorspace	24,690	515	2%

Perrywood Business Park is dominated by service-based businesses, these account for 50% of the units and 70% of the floorspace. The remaining units are taken up by manufacturing industries (45%). 5% of the units are vacant.

The majority of floorspace (47%) is occupied by office B1(a) use, following by light industrial B1(c) with 26%. B1(b) and B8 uses account respectively for 14% and 11% of the floorspace.

Use Classes (Left – Units; Right – Floorspace)



Planning and Development Activity

There are currently no outstanding planning permissions in the Perrywood Business Park.

Salfords Industrial Estate, Salfords





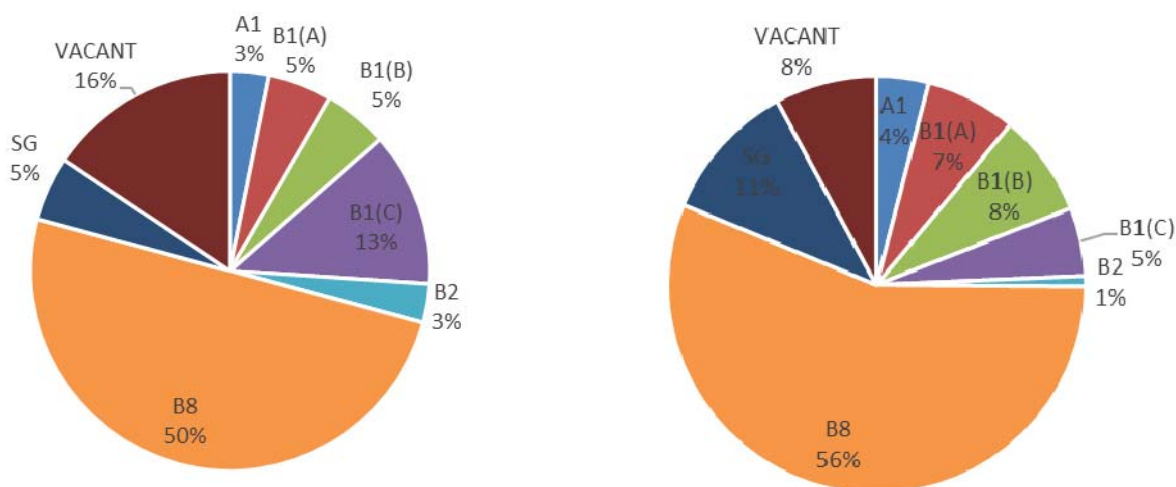
New Occupiers & Vacancies

Within this monitoring period there have been a number of occupier changes: Earth Anchors and Rag Bags have both moved into previously vacant units. Naxos Music Ltd has replaced Select Music Distribution and Horley Road Services has taken over the unit previously occupied by MV Trucks. Success photography has moved out of the two units it previously occupied and one other unit has become vacant following the departure of Adopt SMT.

	Total	Vacant	% Vacant
Units	96	15	16%
Floorspace	81,826	6,460	8%

Given its strategic location on the A23 corridor, it is perhaps expected that Salfords is dominated by warehouse and distribution (B8) uses. This accounts for half of the units and just over half of the floorspace (56%) in the industrial estate (60% of the occupied units and 61% of the occupied floorspace in the industrial estate). The rest of the estate is made up from a mix of offices, car dealerships, manufacturing and service industries.

Use Classes (Left – Units; Right – Floorspace)



Planning and Development Activity

Planning permission 18/01180/F has been granted for the redevelopment of the Former Philips Research Laboratory site. This will provide 15,831sqm of employment floorspace. The works have commenced and are close to completion.

Balcombe Road Industrial Area, Horley



New Occupiers & Vacancies

Within the last 12 months, one new occupier has moved into the estate: The Real Pizza Company has taken over the unit previously occupied by Hi-Line Safety Systems. There are currently no vacant units on the estate.

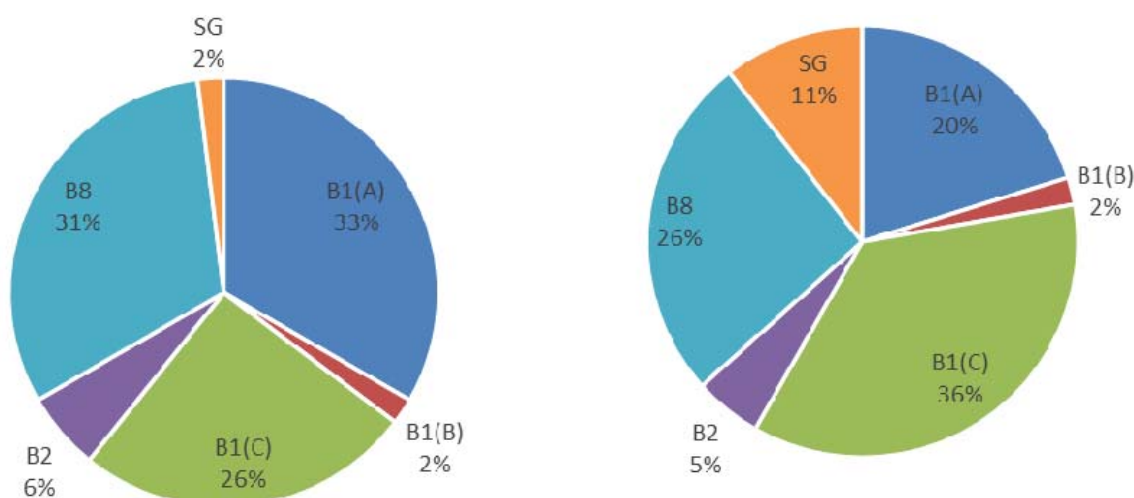
	Total	Vacant	% Vacant
Units	51	0	0%
Floorspace	18,285	0	0%

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.

Service industries account for 59% of the units and 59% of the floorspace, followed by storage & distribution with 25% of units and 24% of floorspace.

The estate is predominantly made up of offices (B1(a)) and warehouse and distribution (B8), together these use classes account for 64% of the units and 46% of the floorspace. Light industrial (B1(c)) occupies a further 26% of the units and 36% of the floorspace respectively.

Use Classes (Left – Units; Right – Floorspace)



Planning and Development Activity

Planning permission 19/00062/F was granted in this monitoring period for the redevelopment of the former Horley Gas Holder Station. This will provide 4,850sqm of office accommodation.

Appendix

Use Classes Order

USE CLASS	DESCRIPTION OF USE/DEVELOPMENT	PERMITTED CHANGE
A1 (Shops)	Retail sale of goods to the public – shops, post offices, travel agencies and ticket agencies, hairdressers, funeral directors and undertakers, domestic hire shops, dry cleaners, sandwich bars (sandwiches or other cold food purchased and consumed off the premises), internet cafés.	Upper floors as 2 flats C3 (up to 150m2)* A3 (up to 150m2), A2 (including with up to 2 flats), D2 (up to 200m2)*
A2 (Professional and Financial Services), but excluding betting offices or pay day loan shops	Banks, building societies and bureaux de change Professional services (other than health or medical services) – estate agents and employment agencies	A1 (if ground floor is a display window), Upper floors as 2 flats C3 (up to 150m2)* A3 (up to 150m2)* D2 (up to 200m2)*
A3 (Restaurants and Cafes)	Use for the sale of food for consumption on the premises. Excludes internet cafés	A1 or A2
A4 (Drinking Establishments)	Use as a public house, wine bar or other drinking establishment	A1, A2 or A3
A5 (Hot Food Takeaways)	Use for the sale of hot food for consumption off the premises	
B1 (Business)	(a) Use as an office other than a use within Class A2 (financial and professional services).	B8 (up to 500m2) C3 from B1(a) Office Use,* State Funded School or Nursery*
	(b) Use for research and development, studios, laboratories, high technology.	B8 (up to 500m2)
	(c) Use for any industrial process that can be carried out in a residential area without detriment to amenity.	B8 (up to 500m2)
B2 (General Industrial)	Use for the carrying on of an industrial process other than one falling in B1(C) above.	B1 B8 (up to 500m2)
B8 (Storage and Distribution)	Wholesale warehouses, distribution centres and repositories	B1 (up to 500m2) C3 (up to 500m2)*
C1 (Hotel)	Hotels, boarding houses and guest houses	State-funded school or registered nursery, subject to prior approval by local planning authority
C2 (Residential)	Hospitals, nursing homes, residential education and training centres. Use for the provision of	State-funded school or registered nursery, subject to

Institutions)	residential accommodation and care to people in need of care.	prior approval by local planning authority
C3 (Dwelling houses)	Use as a dwelling house, whether or not as a sole or main residence.	C4
C4 (Houses in Multiple Occupation)	Small shared dwelling houses occupied by between three and six unrelated individuals, as their only or main residence, who share basic amenities such as a kitchen or bathroom.	C3
D1 (Non-Residential Institutions)	Clinics and health centres, crèches, day nurseries, day centres and consulting rooms (not attached to the consultant's or doctor's house), museums, public libraries, art galleries, exhibition halls, non-residential education and training centres, places of worship, religious instruction and church halls.	State Funded School* Permitted change to A1, A2, A3 or B1 of up to 150m2 of a building for a single period of up two years, subject to prior notification of local planning authority
D2 (Assembly and Leisure)	Cinemas, dance and concert halls, sports halls, swimming baths, skating rinks, gymnasiums, bingo halls, other indoor and outdoor sports and leisure uses (not involving motorised vehicles or firearms)	State-funded school or registered nursery, subject to prior approval by local planning authority Permitted change to A1, A2, A3 or B1 of up to 150m2 of a building for a single period of up two years, subject to prior notification of local planning authority
Sui Generis** (Casinos and Amusement Arcades/Centres)	Sui generis uses are their own specific use and planning permission is normally required for any change of use. However the following changes are permitted for the specified uses.	Casino to: A3 (up to 150m2)* C3 (up to 150m2)* D2* Amusement arcade to: C3 (up to 150m2)*
Sui Generis** (Betting Offices and Pay Day Loan Shops)		A1 if ground floor is a display window A2 including up to 2 flats A3 (up to 150m2) C3 (up to 150m2)* D2 (up to 200m2)
Sui Generis** (Agricultural Buildings)		A1, A2, A3, B1, B8, C1, C3, D2*

*subject to prior approval by the local planning authority.

**Whilst the most commonly found uses are contained within the 1987 Use Classes Order (as amended), there are many uses that are not specifically categorized by the four main use classes. These are classified as sui generis. Some of the sui generis uses are listed but they are not intended to be exhaustive. Sui generis uses are their own specific use and planning permission is normally required for any change of use.

Monitoring Publications

Regular Monitors:

Annual Monitoring report

Summarises the Council's performance against key monitoring indicators.

Housing Delivery

Provides information on housing completions and permissions and details the Council's Five-Year Land Supply Trajectory.

Commercial Development

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

Industrial Estates

Contains an analysis of occupational trends in the borough's nine main industrial estates including a schedule of occupiers

Local Centres

Provides information on retail provision in the borough's eighteen local shopping centres

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.

Environment and Sustainability

Provides information about performance against the environmental, sustainability and transport indicators in the Core Strategy and Development Management Plan.

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:

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