

Employment Land Statement

Jones Lang LaSalle Incorporated

FINAL REPORT

Proposed extension of Solstice Park, Amesbury, Wiltshire.



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Appendix 1 – Proposed extension of Solstice Park site plan

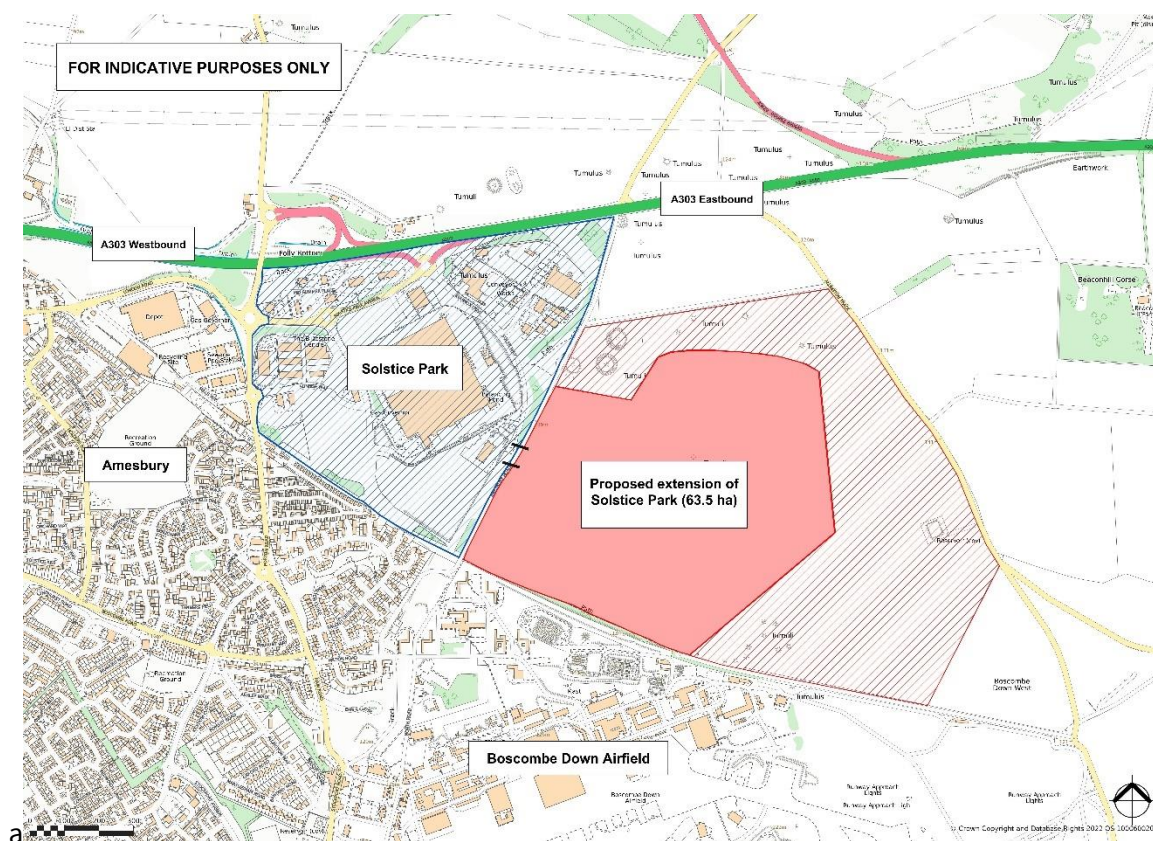
Appendix 2 – Solstice Park accommodation summary & plan

1 Introduction

1.1 Purpose

This Employment Land Statement has been produced by JLL on behalf of Lincoln College (University of Oxford) and Classmaxi Ltd who are collectively working to promote the land adjoining Solstice Park for employment uses. The Landowners interest extends to the full field of 123 hectares (305 acres) (Earl's Farm Down – hatched red) adjoining Boscombe Down airfield, the Allington Track and Solstice Park, together with access and egress to and from the Solstice Park road network, of which some 63.5 hectares (157 acres) is proposed for development and presents the opportunity to create an extension to the existing Solstice Park. The subject site is detailed (shaded red) on the plan below and at Appendix 1. For reasons relating to archaeology and landscape, in respect of which initial surveys/studies we are advised have been carried out, the site currently proposed for development has been limited to 157 of the 305 acres of Earls Farm Down.

Figure 1: Land adjoining Solstice Park



As discussed in more detail below, Wiltshire Council is in the process of reviewing their local plan. In January 2021 the Council published a Planning for Amesbury consultation document which stated the following:

'No further employment land is required in Amesbury given the existing provision in and around the area.'

It is considered that this would significantly inhibit the local market and frustrate the Council's strategy for economic development in the area. This report provides evidence to support the case for additional supply of employment land around Amesbury and provides justification for the proposed extension of Solstice Park for employment uses.

Principally, this justification is market based. Specifically, we have considered the market for large format warehouse buildings, which are known in the industry as “Big Box” formats and primarily, but not exclusively, serve the logistics industry and comprise units in excess of 9,300 square metres (100,000 square foot).

The landowners, Lincoln College (University of Oxford), and Classmaxi Ltd, view the subject site as being particularly well suited for a range of employment uses but, in particular, the logistics sector. This conviction results from the experience gained from two decades of development of Solstice Park. The landowners, and we also, consider there is a gap in the market with insufficient suitable land available in the short and medium term. The existing provision of consented or allocated sites for employment in the Amesbury area and in the wider District includes sites which are neither suitable nor marketable nor deliverable for such development. To correct this shortfall, the landowners present the proposed extension of Solstice Park as a credible and deliverable site capable of ensuring sufficient land of the right type is available in the right place at the right time to support growth and innovation in the years ahead.

The work we have undertaken to support this view includes an independent review of the local and regional market, as well as an initial assessment of the capacity of the site and the potential to develop up to 200,000 m² (2.2 million ft.²) of B2 or B8 employment floorspace as an extension to Solstice Park. We have in addition examined whether the site would help to accommodate an increasing demand for much needed employment land to meet both regional and national demand. The results of the review follow from item 1.2 “Scope” as below.

Furthermore, the deliverability of the proposed extension of Solstice Park will in our view be materially enhanced not only by the landholdings of the two landowners, but also by the fact that the same project development team which has from the outset been responsible for the conception and development of Solstice Park, and the creation of its successful franchise, is responsible for the proposed extension. There are currently some 2,500 full-time jobs at Solstice Park, which have been created principally in the last 15 years. Over recent years there has been a very significant reduction in the operations being undertaken at the adjoining Boscombe Down Airfield, to the extent that there are now only a small number of people working there

The success of Solstice Park and the establishment of its thriving franchise, together with its direct connections to and from the A 303 (designed and largely paid for by the developer of Solstice Park), and the comprehensive extent of the service facilities already present (for more information about Solstice Park, please see Appendix 2), will in our view contribute significantly to achieving similar success for the proposed extension, for the benefit also of the inhabitants of Amesbury and the wider Salisbury District.

1.2 Scope

This report is set out in the following sections:

Section 2 considers the relevant policy basis and associated evidence base for employment land. This provides context to the remaining sections, which principally cover the demand and supply of sites. Particular consideration is given to what extent the planning policy context takes into account the market for employment uses and notably the manufacturing and logistics sectors and how recent market conditions compare with the evidence base used by the Council.

Sections 3 and 4 provide an overview of the importance of the logistics market to the UK and analyses the recent and future growth of the logistics sector at both a national and regional level.

Section 5 sets out our high-level development assumptions in relation to development capacity and potential job creation.

Section 6 provides an overview of the logistics market at a national and regional level, with reference to the latest published research by JLL for this sector. It comments on the need for development land to serve demand from

this sector and considers some of the market signals evidencing a shortage of stock and land – such as levels of speculative development and take up. Consideration is also given to key market drivers moving forward as well as analysing the impacts to date of the Covid 19 pandemic and Brexit.

Section 7 looks at the demand profile for the logistics sector in the Wiltshire area. Amesbury is situated at a nodal point of the strategic road network adjoining the A303.

Section 8 addresses the shortcomings of the current supply of employment sites in the Wiltshire area in serving this market and meeting specific requirements of logistics and manufacturing occupiers. A detailed assessment of sites in the Wiltshire area, either consented or allocated, has been undertaken. This assessment reveals a lack of suitable land for development - a shortage that we consider could be greatly assisted by the proposed extension to Solstice Park which is being promoted by this Employment Land Statement.

Section 9 considers the site from a logistics occupiers' perspective in terms of location, situation, and siting. Particular emphasis is drawn to the importance of direct access to the motorway or strategic road network, with reference to a number of schemes in Wiltshire which have been successful in accommodating demand for Big Boxes and thereby attracting inward investment.

Section 10 provides a summary and conclusions.

1.3 JLL

JLL is one of the biggest commercial property agents serving the UK, with offices throughout the UK, including Bristol, London, and Birmingham. It is a multi-disciplinary practice but is particularly well known for its expertise and experience with industrial, distribution and office property. It produces a half yearly update entitled UK Big Box H1 2021. It also produces a number of research papers that track key trends and market sentiment on the demand and supply of industrial and logistics floor space throughout the UK.

JLL is an active agent in the sub-region in terms of employment property and land. Current instructions in the South West and smaller employment sites in Wiltshire include:

- St Modwen Park (Chippenham Gateway), Chippenham
- Mountpark XL, Bristol
- Notaro Park, Junction 24 M5
- Keypoint, Swindon

2 Planning Policy Context & Associated Evidence Base

This section considers the relevant policy context and associated evidence base for employment land in Wiltshire. Specifically, consideration is given to whether or how it has embraced the delivery of employment development land and responds to the unprecedented levels of growth the sector experienced recently.

2.1 Planning Policy Context

2.1.1 National Planning Policy Framework (NPPF)

The original NPPF (March 2012) was replaced in July 2018. This was revised further in July 2021.

Paragraph 38 of the NPPF states that Local Authorities should approach planning decisions in a positive and creative way. They should secure development that improves the economic, social, and environmental conditions of the area. Local Authorities should approve applications for sustainable development wherever possible.

The economic objective in achieving sustainable development is considered in greater detail in Paragraph 8. It refers to establishing a strong responsive and competitive economy through ensuring **sufficient land of the right type** is available in the **right places** at the **right time** to support growth and innovation.

Under the sub-heading “Building a Strong, Competitive Economy”, it states at Paragraph 81 that: -

*“Planning policies and decisions should help create the conditions in which businesses can invest, expand and adapt. **Significant weight should be placed on the need to support economic growth and productivity**, taking into account local business needs and wider opportunities for development. The approach taken should allow each area to build on its strengths, counter any weaknesses and address the challenges of the future. This is particularly important where Britain can be a global leader in driving innovation and in areas with high levels of productivity, which should be able to capitalise on their performance and potential.” [Our emphasis].*

It is further stated at Paragraph 83 that: -

“Planning policies and decisions should recognise and address the specific locational requirements of different sectors. This includes making provision for inter alia the storage and distribution operations at a variety of scales and in suitably accessible locations.”

Section 11 of the NPPF is entitled “Making Effective Use of Land”. In the context, Paragraph 122 states: -

*“Planning policies and decisions need to reflect changes in the demand for land. **They should be informed by regular reviews of both the land allocated for development in plans, and of land availability.**”*

2.1.2 Wiltshire Local Development Plan 2006 – 2026 (adopted January 2015)

The Local Development Plan (LDP) includes the Wiltshire Core Strategy incorporating saved policies from district local plans, Chippenham Site Allocations Plan, Wiltshire Housing Site Allocations Plans, Minerals and Waste Plans and made Neighbourhood Plans.

Section 1 of the Core Strategy sets out a number of key principles which underpin the strategy to help build more resilient communities. This includes but is not limited to the following:

*‘Creating the right environment to deliver economic growth, delivering the jobs Wiltshire’s population needs locally, and **taking a flexible and responsive approach to employment land delivery.***

*Managing development to **ensure that jobs and the right infrastructure are delivered at the right time** to ensure that out commuting, in particular to areas outside of Wiltshire, is not increased and development does not have a detrimental impact on infrastructure.’*

The Core Strategy puts planning for job growth and meeting the needs of business as central to the strategy, policies are focused on attracting new inward investment and helping existing businesses meet their aspirations in Wiltshire, as well as providing the right environment for business start-ups. To achieve this the Core Strategy aims to identify new land for job growth, allow for the redevelopment of outdated premises, safeguard a range of employment sites to give the market choice and ensure potential barriers to investment are overcome.

Section 1 also incorporates objectives from the Wiltshire Community Plan 2011 – 2026 which has three overarching priorities, the most relevant to this site being the need to **create an economy that is fit for the future.** The Core Strategy commits to contributing to delivering this priority as part of its policies.

Paragraph 2.6 sets out 6 key ‘strategic’ challenges which broadly impact the entire county, the first of which is Economic Development. The document identifies an issue with net out-commuting flows and discusses the importance of improving self-containment to ensure there are a range of appropriate employment opportunities available. It also states that an important part of addressing this challenge is **“to provide the correct amount and type of employment provision to react to anticipated levels of growth”.**

Section 3 of the Core Strategy outlines the spatial vision for Wiltshire which identifies six strategic objectives to address the aforementioned challenges, the first of which is ‘Delivering a Thriving Economy’. It sets out the following:

***‘Wiltshire needs to encourage a buoyant and resilient local economy.** The Core Strategy enables development to take place and encourages economic vitality, providing local jobs for Wiltshire’s population, whilst ensuring that sustainable development objectives have been met.’*

Within the Core Strategy land is identified to provide up to 27,500 new jobs up to 2026. Wiltshire Council identifies several key outcomes of Strategic Objective 1, including the need to secure sustainable growth of established and emerging employment sectors while building on existing strengths.

Section 4 sets out the specific policies that Wiltshire have identified to deliver on the aforementioned objectives. It should be noted that there are a host of policies related to design, sustainability, and infrastructure that all require due consideration, if the site is to be taken forward for development. However, at this stage we have focused on the key policies of principle related to the economy and employment land.

Core Policy 1 - Settlement Strategy: Amesbury is identified as a Market Town, whereby it has potential for significant development that will increase jobs to help sustain and, where necessary, enhance the services and facilities to promote better levels of self-containment and sustainable communities.

Core Policy 2 – Delivery Strategy: The delivery strategy recognises that there is an imbalance in Wiltshire between jobs and homes and seeks to address this issue. Therefore, the underlying principle of this policy is to ensure a better balance of jobs, homes and services and facilities.

With regard to employment land the Core Strategy identifies a pipeline of c. 178 hectares to supplement that which has already been built since 2006 or has planning permission. The land is to be provided by a combination of the following:

- New strategic employment allocations.
- Provision of employment land as part of mixed-use urban extensions.
- Retained Local/District Plan allocations for employment land.

Core Policy 4: Spatial Strategy for the Amesbury Community Area: From an economic perspective the strategy for the Amesbury Community Area is focused around having good levels of employment. This will be achieved by managing significant growth and ensuring that the world-class employers in the area can continue to expand and provide valuable employment opportunities.

The supporting text recognises that to ensure balanced growth within Amesbury the delivery of improved infrastructure will be required. It notes that while the A303 is an arterial route from London to the South West it suffers from congestion problems due to intermittent stretches of single lane carriageways. Thus, impacting the attractiveness of Amesbury for business investment. The Council is committed to working collaboratively with agencies to achieve a suitable solution to the dualling of the A303.

Core Policy 34 – Additional Employment Land: The supporting text suggests that Wiltshire does not have enough land available in the right location at the right time to meet business needs which could result in the county losing business to other locations where a more attractive business and regulatory environment exists. It recognises that an element of flexibility is required to allow new employment opportunities to come forward outside of but adjacent to Market Towns, where they are considered to be essential to the economic development of Wiltshire. The subject site currently lies outside of but adjacent to the settlement boundary for Amesbury.

In relation to the proposed extension of Solstice Park the policy reads as follows:

‘Outside the Principal Settlements, Market Towns and Local Service Centres, developments will be supported that:

- i) Are adjacent to these settlements and seek to retain or expand businesses currently located within or adjacent to the settlements; or*
- ii) Support sustainable farming and food production through allowing development required to adapt to modern agricultural practices and diversification; or*
- iii) Are for new and existing rural based businesses within or adjacent to Large and Small Villages; or*
- iv) Are considered essential to the wider strategic interest of the economic development of Wiltshire, as determined by the council.*

Where they:

- a) Meet sustainable development objectives as set out in the policies of the Core Strategy; and*
- b) Are consistent in scale with their location, do not adversely affect nearby buildings and the surrounding area or detract from residential amenity; and*
- c) Are supported by evidence that they are required to benefit the local economic and social needs; and*
- d) Would not undermine the delivery of strategic employment allocations; and*
- e) Are supported by adequate infrastructure.’*

2.1.3 Wiltshire Local Plan Review

Wiltshire Council is in the process of reviewing their local plan. The Wiltshire Local Development Scheme (LDS) sets out the Development Plan Documents (DPDs) prioritised for production and the likely timeline for preparation and adoption.

We have summarised below the most recent timeline for the Local Plan Review (published in December 2021):

- **Initial consultation on the scope of the plan:** undertaken November 2017
- **Plan preparation** (including evidence gathering and informal consultation, with public consultation completed Q1 2021): Over the period Q1 2018 to Q3 2022
- **Publication of plan for pre-submission consultation and preparation for submission following consultation:** Q4 2022 to Q2 2023
- **Submission to Secretary of State:** Q2 2023
- **Examination** (including hearing and receipt of Inspector's report): Commencing Q2 2023
- **Adoption:** End Q4 2023

We understand that the Council has not yet published a draft local plan and the consultations to date have been centred around the key components, namely housing and employment distribution, to inform the draft local plan.

Wiltshire Emerging Spatial Strategy (January 2021)

As part of the local plan review the Council has published an Emerging Spatial Strategy document which addresses the overall distribution of development across the county, part of which includes analysing the additional employment land required during the period 2016 -2036. In formulating the spatial strategy, the Council has subdivided the County into four Housing Market Areas (HMAs) of which the subject site falls within the Salisbury HMA.

Section 2 outlines the findings of the Emerging Spatial Strategy which identify a forecast requirement to plan for an additional 26 hectares (64.2 acres) of employment land. The document goes on to advise that there is already a large supply of land available to meet business needs across the County. Based on the aforementioned HMAs the additional 26 hectares is distributed as follows:

- Chippenham – 9 hectares (22.2 acres)
- **Salisbury – 10 hectares (24.7 acres)**
- Swindon (the Wiltshire part) – 6 hectares (14.8 acres)
- Trowbridge – 1 hectare (2.5 acres)

At a strategic level the Council has reviewed the existing employment land supply, taking account of forecast rates of take up and demand, and are satisfied that ***‘the current pool of land for industry and office uses generally continues to meet anticipated needs.’*** Therefore, the local plan review will not include additional employment requirements for most settlements. However, it goes on to discuss the role of the planning framework in supporting economic recovery from the impacts of Covid 19 and as such planning controls need to be less prescriptive and flexible.

Planning for Amesbury (January 2021)

The local plan consultation document Planning for Amesbury provides limited evidence/information on the potential growth of employment sites within Amesbury. It identifies that Amesbury currently benefits from a

number of existing Principal Employment Areas including Boscombe Down, London Road, Porton Down, High Post and Solstice Park. Thus, concluding that ***‘no further employment land is required in Amesbury given the existing provision in and around the area.’***

2.2 Planning Policy Evidence Base

2.2.1 Swindon and Wiltshire Functional Economic Market Area Assessment (December 2016)

The Functional Economic Market Area (FEMA) Assessment forms part of the evidence base for the Emerging Spatial Strategy and provides the evidence for determining the additional employment land need for the plan period 2016 – 2036. The assessment was issued in 2016, based on evidence from 2015/2016.

The document has formed the basis for the Emerging Spatial Strategy in regard to employment land and Section 6 sets out the key findings of the assessment in terms of future employment site requirements, which we have summarised below:

B1b Research and Development

The economic forecasts predict growth of 2,500 jobs with substantial concentration in the Salisbury FEMA, building on science strengths at Porton Down. It is predicted that this type of development would typically be located in business park environments with development densities in the region of 40%. This equates to a land requirement of 22 hectares in the Salisbury FEMA, 7-8 hectares in the Swindon and A350 FEMAs.

B1c Light Industry

The economic forecasts suggest a low level of growth in this sector within all three FEMAs, with a total of 300 additional jobs across the entire area. It is anticipated that B1c developments would typically be based in business park type environments with development densities of around 40%. Which equates to a land requirement of around 2 hectares in each of the Swindon and A350 FEMAs and 1 hectare in the Salisbury FEMA.

B2 Industry

The economic forecasts suggest a decline in employment in the Swindon FEMA (-1,600 jobs) and Salisbury FEMA (-900 jobs). Modest growth is forecast (+600 jobs) in the A350 FEMA. The assessment has adopted a best practise of 36 square metres (GIA) per worker, which equates to a potential reduction in floor space in the Swindon FEMA and Salisbury FEMA of 62,000 square metres and 35,000 square metres respectively. It identifies a potential additional requirement of 23,700 square metres in the A350 FEMA.

The decline in B2 employment in the Swindon and Salisbury FEMAs is not projected to drive any expansion in the requirement for space. However, the assessment highlights an issue with the release of space to the market in light of a reduction. Moreover, it recognises that this makes it difficult to assess the potential release of land as a result of scaling back. It suggests there could be windfall releases which could contribute to future supply. For the purposes of the Swindon and Wiltshire FEMA Assessment the decline in space required has been carried forward but it should be noted that the relationship between scaling back and the release of sites is unlikely to be perfect in reality.

B8 Storage and Distribution

The economic forecasting suggests a net additional 600 jobs, predominantly within the Swindon FEMA (500 jobs) and the remainder within the A350 and Salisbury FEMAs (100 jobs). The assessment adopts an average of 80 square metres (GEA) per employee to form their assessment of likely land requirements. It also assumes that this

type of space will comprise development densities of 40% which equates to a requirement of 11 hectares in the Swindon FEMA and approximately 1 hectare in each of the A350 and Salisbury FEMAs.

Overall, the assessment predicts continued growth in employment within warehousing based activities.

Section 6 also analyses historical employment completions to forecast the potential future requirement. The data for Wiltshire covering a 9 year period (2007 – 2015) suggests average annual completions of around 55,000 square metres. The evidence base doesn't provide clear land based figures but assuming a 45% development density it equates broadly to 12 hectares.

Taking account of the combined historical employment completions the assessment concludes a **total requirement for B use classes of 15 hectares per annum to be provided through the local plan over the plan period**. However, this finding will need to be reassessed in light of the Covid-19 pandemic and significant change in market conditions.

2.2.2 Wiltshire Employment Land Review (May 2018)

The Employment Land Review (ELR) sets out an assessment of the future demand for B use class land in Wiltshire and a review of the supply of sites and assesses the fit between the two. It forms an important part of the evidence base for the emerging local plan.

Section 2 provides a summary of the economy within Wiltshire. It states that Wiltshire has experienced below average economic growth since 1997, with productivity levels below the UK average, which it attributes to a limited supply of sites. It considers the county in relation to three district Functional Economic Market Areas (FEMAs): the Wiltshire part of a larger M4/Swindon FEMA, the A350 FEMA, and the A303/Salisbury FEMA, the last of which the subject site forms a part.

Section 2 also covers the Council's role in securing inward investment and retaining strategic employers. Among other aspects one of the key strengths reported by Wiltshire's strategically important businesses is the good connectivity to the transport network, specifically the M4, A350, A303 and mainline railways. **One of the key weaknesses includes the availability and deliverability of sites, particularly workspace that meets the individual business's needs.**

The ELR is based on employment growth forecasts from Cambridge Econometrics and Oxford Economics which were published in **2015/2016**. It should be noted that **the ELR review process did not identify any significant reasons to consider updating the employment growth forecasts**. The demand for employment land is calculated on the basis of forecast growth in employment, the need for the replacement of premises that are no longer fit for purpose plus allowances for churn and choice in the local market.

Section 3, Figure 3.2 identifies a total demand for employment land over the past 20 years for the whole of Wiltshire at 180 hectares, 140 of which has been for industrial stock. Demand for the A303/Salisbury FEMA over the past 20 years has been a total of 60 hectares of which approximately 45 hectares has been for industrial stock. The A350 FEMA has had the highest demand over the last 20 years.

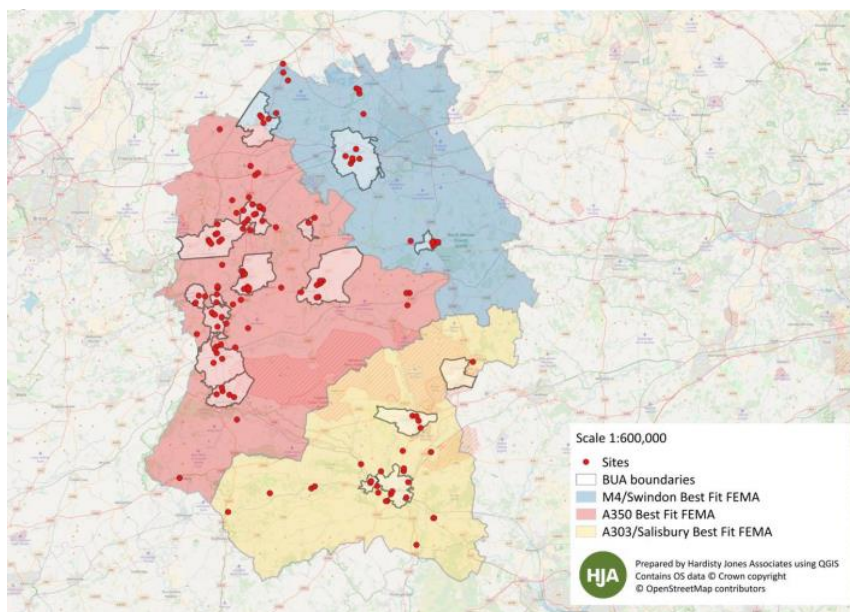
Section 4 states that in 2017 there was 3.6 million square metres of existing employment (B use class) space in Wiltshire (based on VOA records). Of this 86% comprises logistics/warehousing and standard of industrial space. The A350 FEMA had the largest amount industrial space at 67% of the Wiltshire total. The A303/Salisbury FEMA had the second largest amount of each use class.

The document reports that the office and industrial property markets in Wiltshire have remained resilient despite the uncertainty of Brexit and the 2017 General Election. It identifies a dearth of industrial and logistics space

which has resulted in a 15-20% increase in rents during the past 5 years (2012 – 2017). **The ELR attributes the increase in rents to the excess of demand over supply.**

Section 5 summarises the findings of the Council’s review of 147 existing and potential future employment sites, which included principal employment areas and Core Strategy allocations as well as a number of unallocated sites. As shown on the map below:

Figure 2: Location of all sites reviewed



Source: Extract from Wiltshire Employment Land Review – Page 39 (May 2018)

Of the 147 sites 42 were identified as having some potential to deliver new employment land. The ELR goes on to recognise that there is a risk to non-delivery with a number of the sites, with the main risks being legal/ownership problems, history of unimplemented planning consents and/or infrastructure constraints (both on and off the sites). The outcome of the review found that the A350 FEMA had the largest amount of potentially available land compared to the M4/Swindon FEMA which had very little. It also found that **over half of the available land is at medium risk of non-delivery.**

Section 6 analyses the fit between forecast demand and supply at a Wiltshire level. When unallocated sites and sites at high risk of non-delivery are discounted it reports a clear under supply of space compared to the top range of forecast demand over the emerging local plan period (2016 -2036). The ELR also reports that there is a sufficient amount of land to meet demand during the first five years of the local plan period in the A303/Salisbury FEMA but predicts a shortfall over the whole 20 year plan period.

The ELR concludes that the total potential supply of sites across Wiltshire (excluding unallocated sites and those at high risk of non-delivery) should be sufficient to meet forecast demand over the LDP period 2016 – 2036. However, it does recognise that if growth is at the upper levels of the forecast demand range then there is the potential for a shortfall of employment land.

The ELR highlights the importance of Wiltshire Council needing to allocate and support the delivery of a portfolio of sites across the County, and across each FEMA to meet forecast demand and allow for flexibility and choice. It estimates that approximately half of the available supply at the time of the report being written was at a medium risk of non-delivery presenting **strong anecdotal evidence that there is a lack of suitable and available sites**

to meet the demand in Wiltshire. It therefore states that the simple quantitative analysis of supply vs demand needs to be balanced with evidence from the local market.

Focusing more specifically on the A303/Salisbury FEMA the ELR states the following:

“In the A303/Salisbury FEMA, the total potential supply is below the range of forecast demand figures when high risk sites are excluded, so there is a likely shortfall of supply, and a need for new allocations. This is the case for the whole Local Plan period, but not during the first five years of this period. Further allocations should be considered in proximity to Salisbury, which is one of the county’s three principal settlements. Solstice Park has been a successful employment location over the last 15 years, and so new allocations could be considered close to here.”

It further highlights the importance of further allocations to support the county’s continued economic growth if a significant number of existing employment sites are lost to other uses.

Section 7.2.2 identifies two potential sites at M4 Junction 17 which were considered as part of the ELR. It states the following in relation to these two sites:

‘It is not necessary to allocate these sites to meet the forecast demand in Wiltshire. Given the size of the two sites – a combined 77 Ha – their allocation would lead to a significant excess of supply over demand, which could affect the deliverability of other employment sites in Wiltshire’

The ELR recognises that these sites are not needed to meet local demand but have the potential to accommodate high value inward investment that would not otherwise come to Wiltshire. In this instance the ELR recognises that these sites could be considered for development. We have summarised below some of the key requirements that would need to be met in order for these sites to be considered:

- Accommodate high value, exceptional economic activities that would be lost to the region or country if they did not locate here.
- Accommodate high value, exceptional economic activities that cannot locate anywhere else in Wiltshire e.g., because of the site size requirement or building floorplate requirement that cannot be met elsewhere in Wiltshire.
- Attract prime advanced manufacturers or other businesses that cannot locate elsewhere in Wiltshire, who will create supply chain opportunities throughout the Wiltshire economy.
- Attract suppliers to existing strategically important businesses who cannot locate elsewhere in Wiltshire.
- These sites should not be competing with other sites in Wiltshire for occupiers who could be accommodated elsewhere in the county.

Finally, Section 7.3 discusses the potential of de-allocating employment sites within the local plan which cannot be viably developed during the plan period. It recognises that these sites could distort the view of supply and demand of employment land and as such the calculation of fit between supply and forecast demand.

2.2.3 Swindon and Wiltshire Local Enterprise Partnership (SWLEP) Strategic Economic Plan (SEP) (2016)

The SWLEP SEP identifies five strategic objectives, the most relevant of which for this report is strategic objective 5:

‘Business development - we need to strengthen the competitiveness of small and medium sized businesses and attract a greater share of foreign and domestic investment into the area.’

In addition to the strategic objectives the plan reviews the three Growth Zones, which were originally identified in 2014. The following zones remain the SWLEPs focus for targeted investment:

- 1) Swindon M4 growth zone
- 2) A350 growth zone
- 3) Salisbury-A303 growth zone

The proposed Solstice Park extension falls within the Salisbury-A303 Growth Zone.

The SWLEP identifies the need to align the acceleration of economic growth, particularly job creation and investment with housing growth, infrastructure, and utilities to satisfy existing and future need.

2.3 A303/A358 Corridor Update

In 2014 the Government as part of its first Road Investment Strategy (RIS) announced that it wanted to unlock economic growth in the South West by upgrading the A303, A358 and A30 to create a high-quality dual carriageway to better connect the region with London and the South East.

It should be noted that the A303 east bound from Solstice Park is dual carriageway until it merges with the M3.

During 2015 to 2020 Highways England (now rebranded as National Highways) identified 8 improvement locations along the A303/A358 and developed proposals for the following schemes:

- A303 Stonehenge
- A303 Sparkford to Ilchester dualling
- A358 Taunton to Southfields dualling
- A30 Chiverton to Carland Cross dualling.

Since 2020 National Highways [has](#) been working on progressing these schemes to obtain consent under a Development Consent Order (DCO) and begin construction before 2025. From 2025 onwards they will commence a second phase whereby further A303 upgrades will be assessed (subject to funding).

An update on each scheme has been provided below:

2.3.1 A303 Stonehenge

The scheme comprises a new dual, two lane carriageway between Amesbury and Berwick Down. The route will move north of the existing road and create a bypass at Winterbourne Stoke with a viaduct over the River Till valley. A new junction at will be introduced at Longbarrow with the A360 to the west of the World Heritage Site (WHS) and the A303 passing under the junction. A 2-mile twin-bore tunnel will be constructed past Stonehenge and a new split-level junction will be created at the Countess Roundabout to connect the A303 and A345.

Figure 3: A303 Stonehenge upgrades



Source: Extract from National Highways website

In 2020 National Highways were granted consent for the above upgrades by way of a DCO. A legal challenge was submitted, and the High Court [has](#) quashed the DCO consent on the basis they upheld two of the ten grounds of the legal challenge. We understand that the Department for Transport are now considering their options in light of the decision and are yet to provide any further updates.

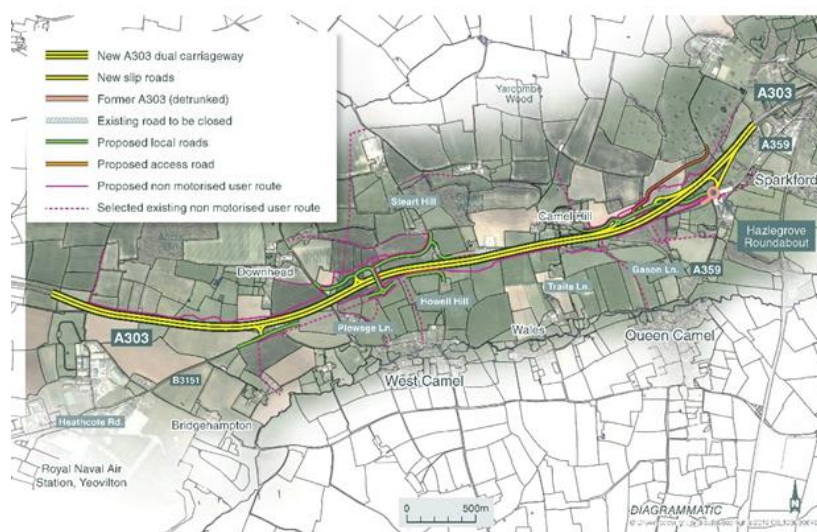
2.3.2 A303 Sparkford to Ilchester dualling

The new dualled section will start east of Podimore Roundabout and will follow the alignment of the existing A303 to Downhead. It then moves north of the existing A303 single carriageway, allowing the existing road to be kept for use as a local road in this section.

The route then rises up West Camel Hill before crossing over the existing A303 at the junction with Steart Hill/Howell Hill. It then takes a southerly alignment before meeting up with the existing road again to pass between Vale Farm and the MOD signal station at Eyewell/Traits Land.

Finally, the route bypasses the existing Hazelgrove Roundabout to the north through the Registered Park and Garden associated with Hazelgrove House, before tying into the existing A303 Sparkford Bypass.

Figure 4: A303 Sparkford to Ilchester upgrades



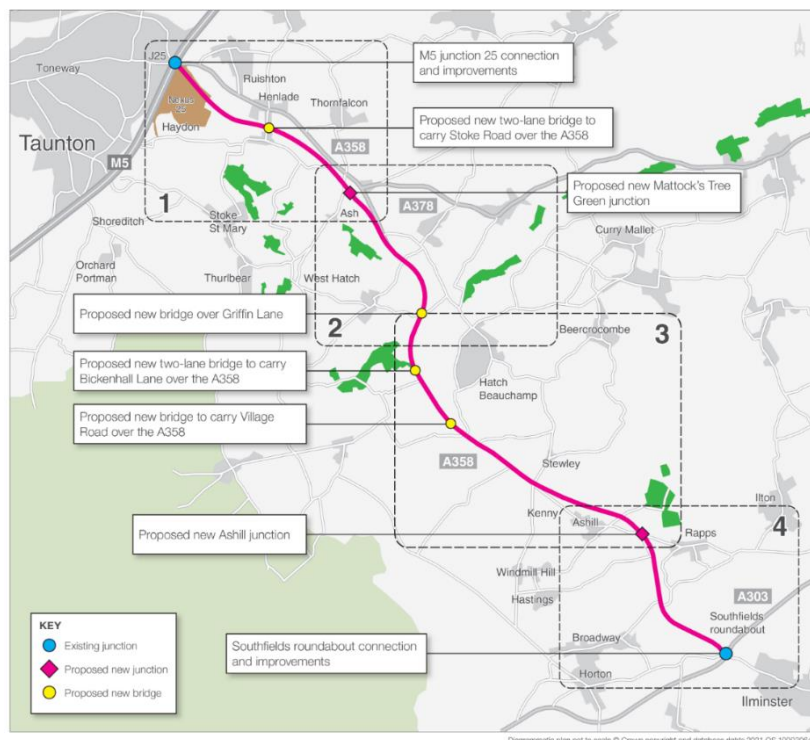
Source: Extract from National Highways website

During October 2021 work commenced on this scheme and contractors are now onsite preparing the ground for construction. Main construction of the new A303 dual carriage way is set to start in 2022.

2.3.3 A358 Taunton to Southfields dualling

The proposals include upgrading an 8.5 mile section of the A358 between Southfields Roundabout on the A303 and the M5 at Taunton, to a high quality dual carriageway. In 2019 National Highways announced their preferred route, which in the most part utilises the existing road, with the exception of the Thornfalcon to Taunton section. Here, a new junction will be created at Thornfalcon and the road will shift to the south of Henlade and then connect into the recently completed roundabout by Nexus Business Park and the Taunton Gateway Park and Ride.

Figure 5: A358 Taunton to Southfield upgrades



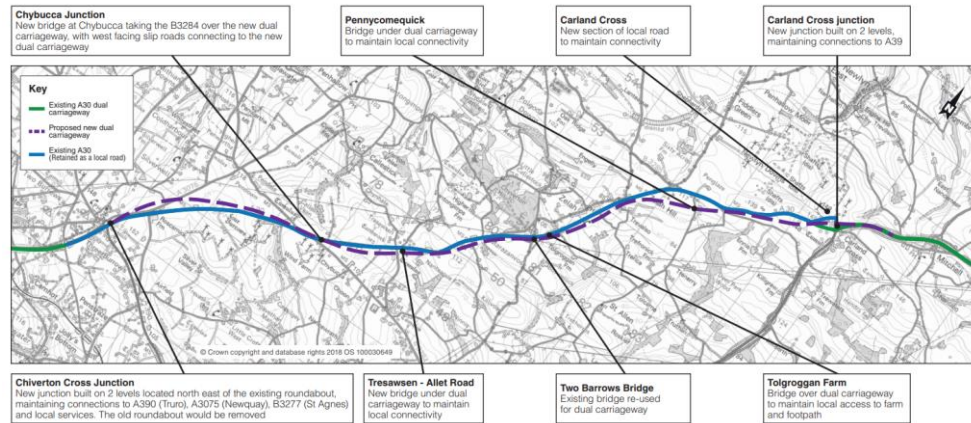
Source: Extract from National Highways website

During October and November 2021 National Highways have consulted on the preliminary designs for their preferred route. We understand they are now reviewing the feedback which will form part of their DCO application, which is set to be submitted in 2022.

2.3.4 A30 Chiverton to Carland Cross dualling

The scheme comprises an 8.7 mile dual carriage way connecting into the existing A30 at each end. The Chiverton Cross and Carland Cross roundabouts will be replaced with new split-level junctions. A new split-level junction will also be constructed at Chybucca with slip roads connecting to the new dual carriage way. The existing A30 will be retained for local traffic.

Figure 6: A30 Chiverton to Carland Cross upgrades



Source: Extract from National Highways website

In April 2020 National Highways were granted consent by way of a DCO. The preliminary works on the scheme began in March 2020 and in late November 2020 the main construction of the road commenced. We understand the scheme is still under construction and National Highways have not provided an indication of their anticipated timescales for delivery.

3 The Recent and Future Growth of the Logistics Sector

3.1 The Importance of Logistics

Logistics buildings (warehouses and distribution centres of all kinds) are critical nodes in most supply chains that connect locations where materials are sourced with points of production and final customers or end consumers. Logistics as an economic activity is focused on the handling, storage and transport of raw materials, parts, sub-assemblies, and finished goods plus ‘reverse flows’ such as waste products and recycled or returned goods. Therefore, logistics buildings and the activities that take place within them, or are associated with them, are essential to the UK and other economies.

For the UK economy one measure of the importance of logistics is the amount of freight transported within the country and into and out of the UK, as international trade. In 2019, the last full year for which official data are available:

- 196 billion tonne kilometres of domestic freight was moved within the UK, of which 79% was by road.
- An estimated 268.7 million tonnes of freight arrived in the UK as imports and 139.5 million tonnes left the UK as exports, and around 95% of this international tonnage freight was moved by sea.¹

A second measure of the importance of logistics to the UK is the number of people employed in logistics. According to a report produced by Logistics UK (the industry body formerly known as the Freight Transport Association) logistics activities employed over 2.5 million people at mid-2020. This total consists of some 1.7 million people employed within the logistics ‘sector’ and around another 800,000 employed in all other sectors of the economy.²

As the Logistics UK study makes clear, logistics is an activity that spans a variety of ‘sectors’, indeed, there is no distinct logistics sector within the official Standard Industrial Classifications (SICs). The nearest to it is the broad transportation and storage sector, which includes relevant activities such as ‘warehousing and support activities for transportation’ and postal and courier activities but also other transport activities that are not, including passenger transport.

3.2 The Growth of Logistics

3.2.1 Recent Growth

Table 1 below presents UK employment and Gross Value Added (GVA) growth rates for the transportation and storage sector together with growth projections based on data from Oxford Economics. The transportation and storage sector includes the provision of passenger or freight transport by rail, pipeline, road, water or air and associated activities such as terminal and parking facilities, cargo handling, storage etc. As such it is the most relevant broad industry sector for logistics, although as it includes passenger transport it is broader than just logistics activities.

¹ Department for Transport, *Transport Statistics Great Britain, 2020*. The figures on imports and exports exclude road freight trade across the Northern Ireland - Republic of Ireland border.

² Logistics UK, *Skills and Employment Report 2020*. The non-rounded estimates are 2,579,582 in total of which 1,745,408 were employed in the logistics sector and 834,174 were employed in all other sectors.

According to Oxford Economics³:

- The UK transportation and storage sector saw growth in total employment of 3.3% per annum over the five years 2015-2019 inclusive, before a projected decline of 1.9% in 2020.
- GVA growth over the five years 2015-2019 was 0.7% per annum, followed by a projected decline of 16.8% in 2020.

Table 1: UK Employment and GVA Growth in Transportation and Storage – past and projected growth rates (% compound annual growth rates)

	Actual		Projected		
	10 years 2010-2019	5 years 2015-2019	2020	5 years 2021-2025	10 years 2021-2030
Total employment	1.8	3.3	-1.9	0.5	0.0
Employees in employment	1.7	3.3	1.5	0.4	0.0
Gross Value Added	1.3	0.7	-16.8	4.0	2.4
<i>Source: Oxford Economics, 2019</i>					

More direct property market indicators that highlight the growth of logistics over recent years include the growth in the amount of floorspace in large logistics buildings taken up for occupation by major companies - retailers, manufacturing companies, third party logistics companies and others - and the growth in the total built stock of the large logistics buildings.

- Across Great Britain, in the five years 2016-2020 some 124.6 million square foot was taken up in Grade A logistics buildings of 100,000 square foot and over, an annual average of 24.9 million square foot.⁴ This compares with a total of 79.3 million square foot and an annual average of 15.9 million square foot in the preceding five years (2011-2015). Therefore, the most recent five-year period saw an additional 9.1 million square foot per annum taken up compared with the previous five, reflecting growth of 57%.
- The higher take-up over the past five years compared with the former five years is partly explained by a record high level of take-up in 2020, when despite the Covid 19 pandemic and severe economic recession, take-up across Great Britain hit 35.8 million square foot.
- At the end of 2020 the total built stock of modern logistics space in buildings of 100,000 square foot and over across Great Britain stood at 331.1 million square foot, compared with 239.3 million five years earlier (end-2015) and 206.2 million square foot 10 years ago (end-2010). Therefore, in the most recent five years some 91.7 million square foot was added to the total stock (annual average of 18.35 million square foot) compared with a total of 33.1 million square foot (annual average of 6.6 million square foot) in the previous five years.⁵

A key driver of demand over recent years has been the explosion in e-commerce, which generates demand for a wide range of logistics buildings including: mega fulfilment centres where the stock is held and picked; central parcel hubs/sortation centres, where items are sorted by end-destination; local parcel delivery centres or other

³ Oxford Economics 2019

⁴ JLL in-house market data.

⁵ The reason why the addition to stock figures is lower than the take-up figures is because not all take-up involves new buildings, as our Grade A definition comprises both new buildings and good quality existing (second hand) modern buildings.

local depots which process the ‘last mile’ delivery to customers; ‘dark stores’ for picking and fulfilling online grocery orders and returns processing facilities. One reason why e-commerce has been an important factor behind the increase in floorspace demand is because pound for pound of sales e-commerce operations typically require more space compared with the space required by traditional warehouse to replenish physical retail stores. This reflects the intensity of operations in e-commerce facilities, including item picking, packing and returns processing.

Despite the increase in the stock of buildings (over the most recent five years especially) the vacancy rate remains at a very low level. At the end of 2020 (and also at the end of March 2021) the Great Britain vacancy rate across the logistics market was just 5%, comparable to the rate five years earlier (4% at Q4 2015) and less than half the rate 9 years ago (11% at Q4 2011)⁶.

3.2.2 Future Growth

As highlighted in Table 1 In the five years 2021 to 2025 UK employment in transportation and storage is projected to grow by 0.5% per annum and GVA by 4.0% per annum.

Projected faster GVA growth relative to employment growth highlights increasing productivity, which is likely to be due to further automation and robots in logistics. A range of research studies show that the transportation and storage sector is highly vulnerable to the adoption of automation due to the type of activities and jobs associated with it and there is a growing trend within large logistics buildings towards the wider deployment of automation and robots which can lead to significant increases in productivity.

In a major study for the British Property Federation, Turley established that in England the existing stock of warehouse space in 2018 (1.657 billion square foot) equated to 69 square foot per home (given a stock of 24 million homes). Given this, it asserted that if the government’s target to build 300,000 homes across England each year is realised then this could generate an additional need for 20.6 million square foot of warehousing each year, assuming no change in the ratio between warehouse floorspace and homes.

The ratio of warehouse floorspace to homes used in this analysis covered all sizes of warehouses and clearly the government’s target of 300,000 new homes for England is not being met. Nonetheless, this analysis does suggest a strong underlying growth dynamic for logistics property demand. In addition, Turley states that: *‘The ratio is not static and the quantum of warehouse floorspace required per home is likely to continue to grow over time.’* This implies that future demand could be even stronger than the application of a ratio of 69 square foot per home might suggest. Therefore, as a broad indication of the quantum of warehouse floorspace required in the future, this study does imply on-going future demand at an elevated level.

Although JLL does not formally forecast market demand for logistics floorspace we believe that occupational demand is likely to remain elevated due to a variety of key drivers, including:

- The continuing growth of e-commerce, which will be driven by an increasing population and the further digitisation of retail.
- The ongoing restructuring of supply chains by companies as they seek to improve customer service and reduce costs including through the greater use of automation and robots.
- The rise of sustainability, and wider ESG considerations, which are likely to lead to increasing corporate demand for new logistics buildings with lower carbon emissions (including net zero buildings) and buildings which provide workers with healthier and safer working environments.

⁶ JLL does not have GB logistics vacancy rate prior to Q4 2011.

4 Future Growth of the Logistics Sector within Wiltshire

4.1 The Logistics Sector within Wiltshire

4.1.1 Recent Growth

Table 2 presents past and projected annual growth rates for total employment, employees in employment and GVA for the transportation and storage sector for both Swindon and Wiltshire. These figures are sourced from Oxford Economics and are comparable to those presented for the UK in Table 1 above.

- The transportation and storage sector saw growth in total employment of 4.9% per annum over the five years 2015-2019 inclusive in Swindon and 1.2% pa in Wiltshire, before a projected decline of -2.2% in 2020 in Swindon and -4.6% in Wiltshire⁷.
- GVA growth over the five years 2015-2019 was 1.6% per annum in Swindon but -2.6% in Wiltshire. The projected declines in 2020 were -16.6% in Swindon and -19.8% in Wiltshire⁸.

Table 2: Swindon and Wiltshire Employment and GVA Growth in Transportation and Storage – past and projected growth rates (% compound annual growth rates)

	Actual*		Projected		
Swindon	10 years 2010-2019	5 years 2015-2019	2020	5 years 2021-2025	10 years 2021-2030
Total employment	1.6	4.9	-2.2	0.0	-0.2
Of which employees in employment	1.2	4.9	-0.6	0.0	-0.2
Gross Value Added	3.8	1.6	-16.6	3.6	2.1
Wiltshire					
Total employment	-2.6	1.2	-4.6	0.3	0.0
Of which employees in employment	-3.0	1.2	-2.3	0.3	-0.1
Gross Value Added	-1.0	-2.6	-19.8	3.7	2.3
<i>Source: Oxford Economics. Within the Oxford Economics data, the latest actual figures for local areas (as opposed to the UK) are for 2018 not 2019 hence these actual estimates are based on a projection for 2019. We have used the same five-year periods to make these figures comparable to those for the UK in Table 1.</i>					

The take-up of logistics floorspace provides a more direct indicator of market demand. Over the past five years 2016-2020 three large Grade A logistics buildings (of 100,000 square foot and over) were taken up in Swindon,

⁷ Oxford Economics, 2019

⁸ Oxford Economics, 2019

see Table 3. In total the three transactions amounted to 2,892,000 square foot but included a single building (with three mezzanine floors) of 2.3 million square foot.

In the previous five years (2011-2015) 1,456,520 square foot was taken up in five transactions. All except one of these transactions was in Swindon; the exception was at Amesbury and involved the largest transaction (700,000 square foot) in this five-year period.

Therefore, based on these transactions, floorspace taken up in the past five years nearly doubled (99% higher) compared with the previous five-year period, although this was substantially due to a single mega transaction.

Table 3: Take-up transaction in Swindon and Wiltshire involving Grade A logistics buildings of 100,000 square foot and over 2011-2020

Scheme name	Location	Size (sq ft)	Tenant/occupier	Grade	Year
Panattoni Swindon	Swindon	2,300,000	Amazon	New BTS	2020
Symmetry Park Swindon	Swindon	217,000	Iceland	New spec	2018
G-Park Swindon	Swindon	375,000	B&Q	New BTS	2018
E Building	Swindon	240,000	KBR	Secondhand	2013
Metro, Groundwell Industrial Estate	Swindon	107,600	Royal Mail	Secondhand	2013
Solstice Park	Amesbury	700,000	Home Bargains	New BTS	2013
Prologis Park DC2	Swindon	302,000	JB Global	Secondhand	2012
Orion	Swindon	106,920	Neptune	Secondhand	2011

Source: JLL. According to our records B&Q leased their original new BTS building (796,649 sq ft) at G-Park, Swindon in 2010 and therefore this transaction (Swindon's second largest) is not shown in the above table.

4.1.2 Future Growth

Table 2 above includes employment and GVA projections for transportation and logistics. In the ten years 2021 to 2030 employment is projected to decrease by 0.2% in Swindon and be flat (zero growth) in Wiltshire. Transportation and storage GVA is projected to grow by 2.1% pa in Swindon and by 2.3% pa in Wiltshire over the same ten years. While a useful indication of projected future growth it should be noted that the figures in Table 2 are based on previous market trends and as such are not reflective of the current market conditions and trends following the Covid 19 pandemic. Therefore, if anything these figures should be taken as a worst case scenario.

Although projections of employment growth are often used to forecast logistics property demand, and GVA projections are sometimes used, in our opinion there are various issues with these approaches. For example, employment growth may not be a good driver of future demand in industries in which:

- Potential changing nature of the workforce in more automated facilities with a decline in some cases in more traditional warehouse jobs in favour of engineering and office based sales and support functions.
- Demand is being driven by structural changes; this is the case with logistics where e-commerce growth is a huge driver of demand for logistics space.

- Demand is relatively footloose in terms of geography and is not necessarily driven by employment growth in a specific geography; this is the case with logistics as companies that need a facility often identify a fairly broad area of search in the first instance before selecting a final location.

In addition, it is undoubtedly the case in the logistics market that supply can create demand (and therefore local employment and GVA growth) so long as the location fundamentals are strong. This has been proven to be the case by the successful development of many logistics parks across the UK in locations where employment or GVA growth would not imply huge market demand. For example, this has been the case at Magna Park, Lutterworth (in the local authority of Harborough) or DIRFT (in the local authorities of Daventry and Rugby). The former comprises some 8.3 million square foot (771,155 square metres) of logistics floorspace with further development to follow. The latter comprises a roughly similar quantum of space with further development potential remaining in DIRFT III.

5 Employment benefit of the proposed site

5.1 Overview

The subject site extends to approximately 63.5 hectares (157 acres) and presents an opportunity to form an extension to the existing Solstice Park. The subject site takes the form of an amphitheatre facing towards Solstice Park as currently existing. A concept master plan and parameter plans will be developed for the site which position buildings, roads, car parking, landscape planting and open space in locations which utilise the site's topography and which limit building heights across the site in order to ensure that development respects the wider landscape, important views and vistas and the need to preserve the setting of heritage assets close by.

Assuming 80% net to gross to allow for landscaping and internal roads, this would result in a net site area of approximately 51 hectares (126 acres), which based on an average site coverage of 40% means the site has the potential to deliver up to 200,000 square metres (2.2 million square foot) of logistics/industrial floorspace.

In line with market demand, it is principally envisaged that the employment floorspace would consist of a range of large-scale logistics buildings extending from around 100,000 square foot to 1 million square foot in size.

The proposed development would give rise to four different types of employment, namely:

1. Construction jobs.
2. Direct, on site, employment in businesses based on the site.
3. Indirect, off site, employment created via supply chain linkages with businesses based on the site.
4. Induced, off site, employment created via the additional consumer spending generated by the extra employment incomes created by the development.

5.2 Employment Generation

5.2.1 Construction Jobs

Construction jobs extend over the period of construction but are temporary and are typically expressed in terms of person years of employment. We have not included the estimated number of construction jobs involved due to their temporary nature.

It should be noted that while construction jobs are considered 'temporary' the development period of a scheme of this scale could extend to approximately 10 to 15 years, acknowledging that there will be peaks and troughs of activity.

5.2.2 Direct Jobs

In terms of direct employment, the employment generated by the development would build up over time and depend on the nature of the employment use and its labour intensity. However, if we assume that the whole employment element (2.2 million square foot) consists of Big Box logistics buildings then we believe this element when fully developed and occupied could generate **over 2,000 direct jobs in gross terms (rounded to the nearest 100)**. This is based on a floorspace to labour ratio (employment density) of 1,028 square foot per worker.

This ratio is derived from the latest UK survey-based results published by Prologis, which was based on a survey of occupiers in 33 buildings providing 7,479,500 square foot of logistics space and employing 7,273 people.⁹

⁹ Prologis, Delivering the future: the changing nature of employment in distribution warehouses, 2019

6.1 National Commentary

6.1.1 Key Market Trends

The industrial and logistics market has been performing well for some time against an indifferent economic outlook, however there can be no doubt that despite some initial uncertainty, the Covid 19 pandemic has had a largely positive impact on the sector, particularly the logistics market. We have seen growth in the market as the crisis accelerated existing trends and enhanced the need for logistics space.

In particular:

- E-commerce spending looks set to increase more rapidly than earlier forecasts.
- Online grocery, which has lagged behind other 'sectors' in terms of market penetration, could expand more quickly, which is partly attributed to a long-term shift in consumer shopping behaviour brought on by the lock-down.
- Companies look set to build in extra 'safety stock' to mitigate future supply chain risks, leading to more warehouse demand.
- Global supply chains are likely to come under review with a move to more diversification in sourcing and more re-shoring. Logically this would increase demand for industrial and logistics space closer to the consumer market.
- The move to automation and robotics will accelerate as companies seek to reduce their reliance on labour for their warehouse (and transport) operations, introducing higher value-added employment, for example to oversee automation and robotics systems (for "picking" and other functions, to keep goods moving 24/7), in addition to securing efficiency gains. This would impact the likely specification of buildings and their locations, including a growing need for increased power capacity and more highly trained staff.

As a result of the pandemic the market has shifted towards focusing on supply chain risk mitigation and resilience.

Companies will increasingly look at:

- Re-shoring or near sourcing of manufacturing, with greatest pressures on critical industries (such as medical devices, technology, and pharmaceuticals). A renewed emphasis on domestic supply chain independence will accelerate this re-shoring trend.
- Greater diversification in terms of sourcing. Distribution networks will be re-set to be less reliant on one country in order to de-risk the production or distribution processes. This will lead to more multifacility / multi-location strategies.
- Diversification of transport modes, including the development of port diversification strategies and investing in locations that provide multi-modal transport options. This is likely to result in additional regional demand for manufacturing facilities and associated logistics, but potentially lead to weaker

world trade growth and container flows at gateway ports. Additionally, companies with very lean supply chains (with low inventory cover) may seek to increase their inventory levels.

The pandemic has accelerated trends already in evidence across the sector such as increased online penetration rates, expansion of online grocery, omni-channel retailing, and the integration of technology into warehousing. Industrial and logistics fundamentals were very strong prior to the Covid 19 crisis. Occupier demand had been exceptionally robust and vacancy rates were at near record lows. The pandemic is highlighting the critical importance of supply chains and logistics real estate, and the sector is well placed to respond to the post Covid 19 recovery.

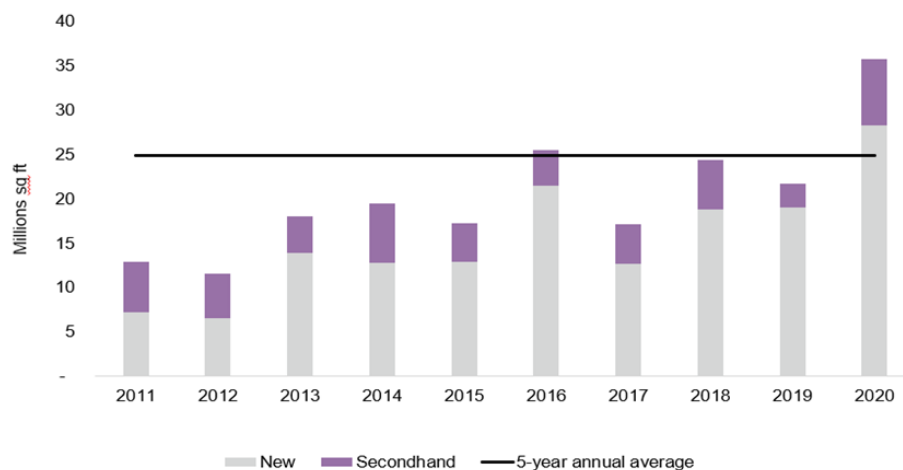
Essentially, the knock-on effect of this is that requirements are becoming more strategically located but conversely, due to the chronic lack of available stock, companies are having to become more footloose to maintain and stabilise their supply chains. This means that companies are specially focusing on core and typical 'non-core' regional locations but also having to look in more 'non-core' locations where supply is typically higher.

6.1.2 UK Logistics Performance analysis

The UK industrial occupational market continues to go from strength to strength off the back of the Covid 19 pandemic. Despite the pandemic and weak economic conditions, occupier demand for Grade A logistics floorspace boomed in 2020, with total take-up of 35.8 million square foot for the year. This represented a 64% hike compared with 2019 (21.8 million square foot) and was 44% higher than the five-year annual average (24.9 million square foot).

In what was a turbulent year, the logistics sector saw a surge in demand from occupiers, as many companies sought to bolster their network capacity and acquire space to meet the explosion in online shopping.

Figure 7: Annual Grade A UK take up involving units of 100,000+ square foot



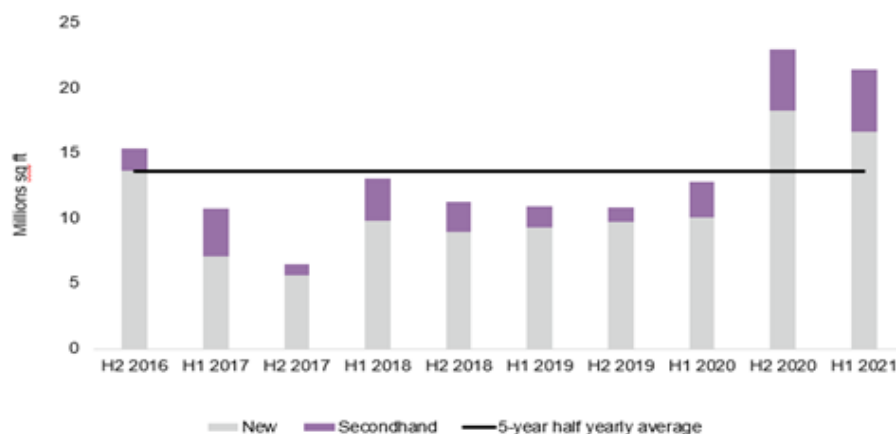
Source: JLL

Last year 28.3 million square foot of Grade A floorspace taken up consisted of new space, representing 79% of the total; the other 7.5 million square foot (21%) comprised good quality secondhand floorspace. In addition to the 35.8 million square foot of Grade A space taken up, a further 3.6 million square foot of short-term Grade A floorspace was taken up in transactions where leases of less than 12 months were agreed.

Moving into the first half of 2021, occupational demand has continued at a staggering pace beyond what was previously experienced, as outlined by the graph and bullet points below:

- H1 2021 total take-up (21.4 million square foot) was 58% higher than the 5-year annual average.
- This figure included the record-breaking Q2 2021 where total Grade A big box take-up reached 14.9 million square foot.
- Of the 21.4 million square foot taken-up, 16.6 million square foot (78%) was in new floorspace and the remaining 4.8 million square foot (22%) was in good quality secondhand space.
- Of the new floorspace taken up, 8.5 million square foot (51%) was in speculatively built units and the remaining 8.1 million square foot (49%) comprised build-to-suit units. This is the first time since H1 2011 that speculatively built space has accounted for a greater share of the new space take-up, highlighting the speed with which many companies need additional capacity that they can put into operation quickly.

Figure 8: Half yearly Grade A take up involving units of 100,000+ square foot



Source: JLL

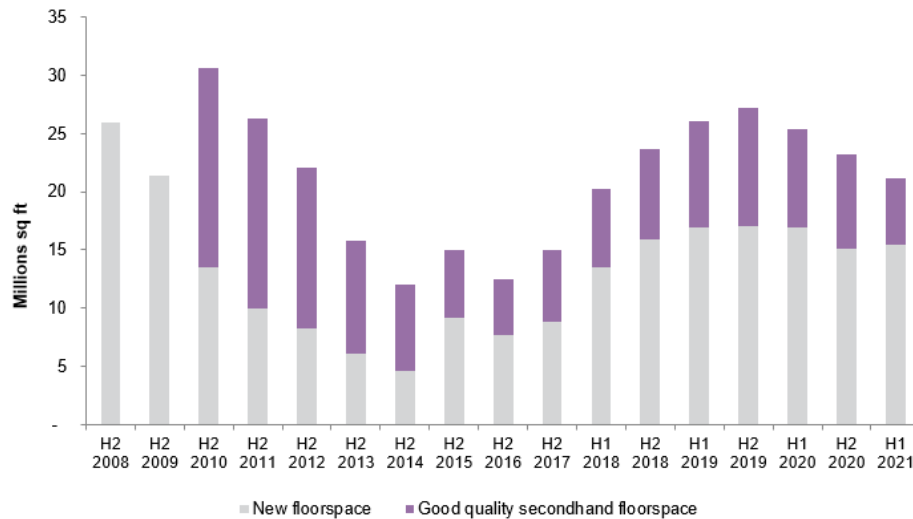
Occupier speed to market has accelerated throughout the pandemic to meet ever growing consumer demand. There is also a continued trend by occupiers to favour well specified new buildings over secondhand units due to occupiers' ESG agendas as well as new units offering the ability to futureproof operations.

However, the primary issue all occupiers currently share is the problem of an acute and deepening shortage of modern supply across all key markets and size brackets causing a rate of rental growth not witnessed before. Whilst speculative development is coming through it is not matching the speed of take-up.

At the end of H1 2021, there was 21.2 million square foot of Grade A floorspace available across Great Britain comprising 15.4 million square foot of new floorspace (including 11.4 million square foot speculatively under construction) and 5.8 million square foot of good quality secondhand floorspace. Total Grade A supply was 9% down on the end of 2020 (23.2 million square foot).

There is now a frenzy in the market with occupiers looking to secure the last remaining units (100,000 square foot and above) that are available today. We are witnessing best bids scenarios on leases, gazumping, and in prime markets where there is now no supply, occupiers are securing units either off plan or under construction on an Agreement for Lease basis to guarantee their occupation. This will therefore have a knock-on effect on what would be supply next year.

Figure 9: Half yearly Grade A supply involving units of 100,000+ square foot



Source: JLL

The UK vacancy rate, counting both immediately available Grade A space and space under construction speculatively, fell to just 6% at mid-year, however excluding speculative product under construction the vacancy rate was just 3%. Although the amount of space under construction speculatively has increased since the end of 2020, overall supply at mid-year was less than the amount of floorspace taken up in the first half of the year.

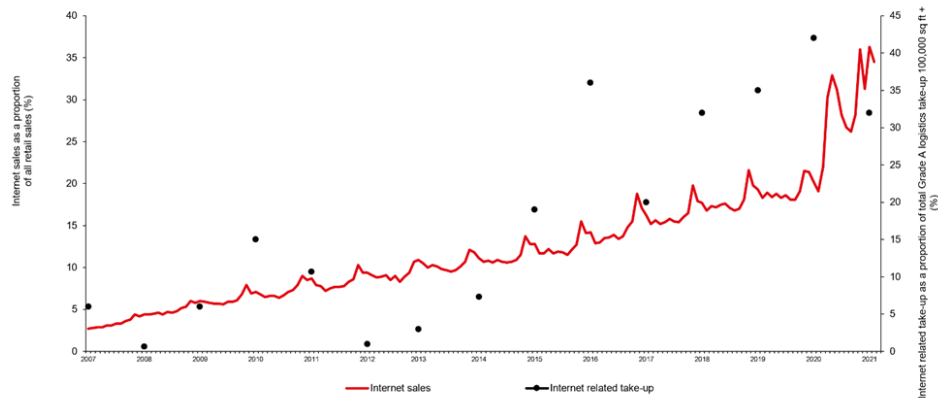
Given the demand and supply dynamics it is unsurprising there is a strong rental growth trajectory and in some core markets we have seen double digit percentage increases in prime rents over the past 12 months, something not ever witnessed previously. Consequently, the prices being paid for industrial land are reaching new highs in all major markets.

Occupational demand is underpinned by a range of solid long-term drivers, and hence we anticipate on-going elevated demand. The market remains extremely active and fast moving.

6.1.3 Occupier Demand

In 2020 approximately 42% of all Grade A logistics take up was for dedicated internet fulfilment. In reality, this proportion of take up is actually higher (closer to 60%) when taking into consideration 3PLs with online retailer contracts as well as traditional 'bricks & mortar' retailers (including the grocery sector) that fulfil online orders as part of their retailing business.

Figure 10: Online sales and internet related take up



Source: JLL

The acceleration in dot.com demand is creating structural change within the retail sector which will continue to create demand into 2022 and beyond. Taking advantage of this fresh impetus, not only do we continue to see demand from Amazon, but it is clear that the Far East market is intent on taking market share. MH Star and Super Smart Service, which is a business servicing Chinese eBay and Amazon 3rd party sellers, have grown their logistics services business exponentially over the past two years.

Further, it is anticipated that Shopify, a Canadian 3rd party seller platform might also look to the UK and Europe for expansion next year and other major global dot.com platforms such as Alibaba and JD.com are also making moves to grow their businesses across Europe.

Looking wider across the sector, the upshot of Brexit is likely to put significant pressure on the UK logistics and industrial market where pan-European companies are likely to invest in UK based warehousing to ensure services agreements are maintained.

6.2 Local Market Commentary

Amesbury is a comparatively small market and one which has tended in the past to rely on indigenous movement and growth, with limited inward investment albeit notable instances have taken place, e.g., Home Bargains/TJ Morris, Greggs and Muller. In addition, the supply and quality of available premises has been poor which can act to constrain demand. A key change in market dynamics has been the increasingly prevalent enlarging of regional catchments. This is in part due to a lack of supply in other areas which is forcing occupiers to be more footloose and seek space further afield, but more so due to a strong market dynamic and a general upward trend of demand. Furthermore, with the ever-growing focus on increased sustainability and companies' growing adherence to CSR's policies and green agendas, (coupled with government enforcement via Energy Performance Certificates), there is an increasing demand for newer, more modern sustainable premises. The need for this space transcends just the environmental factors but also presents a very real economic advantage of cheaper running costs, less maintenance and ultimately less risk over future dilapidations claims.

This demand deals with the cyclical and indigenous demand that we are seeing in regional markets all over the UK but needs to be coupled with the other market factors that are driving demand. We touched on most of these in the above commentary on E-Commerce and Logistics.

We have listed below some key regional trends:

- Increased localised business relocations – less centralised hubs.

- Proximity to workforce – larger hubs are becoming saturated.
- Increased onshoring and re-shoring. Regional hubs increasing to strengthen supply chain.
- Growth in local/regional parcel depots – last mile logistics.
- Expanding supply chains - Increasing need to be close to customers.
- Demand for freehold – often more available in local markets.
- Demand for design and build options rather than existing buildings – the need to cater to more bespoke requirements

We consider the potential extension to Solstice Park to provide a unique opportunity to exploit Amesbury's strategic location at a nodal point on the A303. Amesbury is ideally located for major distribution, as proven by TJ Morris, as the A303 gives access to the full UK motorway network and it is also sufficiently close to Salisbury, Southampton and other parts of the South West to serve as a distribution point. In recent years there has been a lack of any supply of suitable land for Big Box distribution development, with all the suitable sites at Solstice Park having been sold prior to the acceleration of demand for Big Box distribution created by the pandemic. With the proposed improvements to the A303 and links to the M5 via the A358, the location will have an even greater comparative advantage which will further increase its attractiveness to logistics occupiers.

In addition, the only site suitable for significant HGV traffic that we have been able to identify near Amesbury/in the wider Salisbury District that has direct access/egress to/from the A 303, without going through any urban or residential area, is the proposed extension of Solstice Park

7.1 Occupier requirements for Big Box development land

7.1.1 Overview

There are three basic criteria for development land to meet the principal requirements of occupiers of large modern industrial and warehousing premises (i.e., Big Boxes). These are as follows:

- Location.
- Land.
- Labour.

Quick access to the national motorway or strategic trunk road network is fundamental in order to provide certainty in the despatch and delivery of goods. Modern operators seek to be as risk adverse as possible in order to function properly. Congested A or minor roads, particularly those that have to route through built-up and residential areas, are resolutely avoided by occupiers. Available and serviceable sites that are directly served by motorway or strategic trunk road junctions are at a premium and represent the best and most sustainable means of serving manufacturers, retailers, and logistics operators.

Land that can accommodate very large buildings (i.e., 30,000 square metres (300,000 square foot) plus), and/or a cluster of different sized buildings, and can operate without any restrictions, is in particularly high demand. This requires sites collectively in excess of 20 hectares (50 acres).

Operators require premises away from housing because many modern industrial and warehouse operators are run on a 24/7 basis. Buildings also require good eaves height (12m and above) with additional features sought such as sufficient yard space, docking and circulation, which are often unwelcome within otherwise built-up residential areas.

Whilst sites away from housing are sought, strategic employment land needs to be well related to existing built and proposed settlements. This is to ensure sufficient labour supply. In addition, the experience and availability of the local labour force to work in shifts is attractive to many operators.

Finally, new strategic employment sites increasingly require a pleasant and well designed and landscaped setting, preferably with access to a good range of amenities. This is important in attracting and retaining staff.

7.1.2 Proposed extension to Solstice Park

We consider the potential extension to Solstice Park to satisfy all of the above criteria typically required by Big Box occupiers. Amesbury has historically been a distribution and warehousing location and the recent success of Solstice Park has further proven this. The site's direct access to the strategic road network and location away from residential dwellings lends itself well for the site to provide high quality logistics and distribution space, whilst recent housing developments at Larkhill and Durrington, as well as more locally at Archers Gate and Kings Gate in Amesbury, have helped support the labour supply locally.

7.2 Enquiries

Future demand has been expedited by the Covid 19 pandemic which has seen the growth of a number of sectors that are heavily reliant on a strong network of distribution centres, which coupled with historic pent up demand due to a shortage of new build stock and available development land has resulted in a significant increase in the number of enquiries for Big Boxes across Wiltshire and the South West.

7.2.1 South West

At the time of writing this report we are aware of 28 enquiries for Big Boxes across the South West, either buildings or land. In the case of buildings, a total of over 8 million square foot ranging in size from 100,000 square foot to 1,300,000 square foot and in the case of land a total of 2,200 acres ranging in size from 20 acres to 400 plus acres. It should be noted that several of the requirements reported on an acreage basis are looking for in excess of the figures included within our calculations so this should be taken as a minimum requirement for employment land. The enquiries include a range of well-known companies such as TJ Morris, WH Smiths and Hello Fresh.

7.2.2 Wiltshire

In addition to the aforementioned enquiries for the South West we are aware of 14 enquiries for Big Boxes for Wiltshire specifically totalling almost 2.4 million square foot ranging in size between 55,000 square foot to 1,000,000 square foot. The enquiries include a number of well-known companies such as Cotswold Outdoor and Lovehoney.

We are also aware of two mid-box enquiries for Wiltshire for a 55,000 square foot unit and a 60,000 square foot unit. While these requirements fall outside of the Big Box market threshold outlined previously in this report it is worth noting that there is demand for sites within Wiltshire for a range of unit sizes which has not been met.

8 Alternative Site Options

8.1 Existing Employment Sites

Within this section we have analysed the Principal Employment Areas within Amesbury, as allocated and protected by Core Policy 35 of the Wiltshire Core Strategy. We have summarised the findings in the table below to provide an assessment of the current availability of land for large scale industrial and logistics development.

Site Name	Site area	Description/Comments
Solstice Park	158 acres	<p>Site has all been sold. The last plot, Helix, is currently being developed by the RO Group, as referenced below.</p> <p>Not suitable – no land available.</p>
High Post Business Park	18.53 acres	<p>Majority of the site has already been developed for employment uses. Limited development opportunities.</p> <p>Poor access to the strategic road network.</p> <p>Not a suitable location for large scale industrial and logistics uses due to poor access.</p>
Land north of London Road	11.27 acres	<p>Site forms 1 of 3 potential residential development sites which have been promoted as part of the Wiltshire Local Plan Review (SHELAA reference: 3379).</p> <p>Not suitable – land being promoted for residential development.</p>
Land at Boscombe Down (Quinetiq)	17.3 acres	<p>The allocation forms part of the wider secure Boscombe Down MOD site, which is currently in use (partly military and partly let to civilian tenants).</p> <p>The site is located within a secure compound and access is poor via existing residential areas.</p> <p>Not a suitable location for large scale industrial and logistics uses due to poor access.</p>
Porton Down (DSTL/HPA)	c. 216 acres	<p>Porton Down is a secure specialised government scientific location. It has poor access and egress to the strategic road network.</p> <p>Not a suitable location for large scale industrial and logistics uses due to poor access.</p>

8.2 Allocated Sites

Within this section we have analysed sites that extent to 5 + acres (2 + hectares) that are allocated within the Wiltshire Local Development Plan, incorporating the Core Strategy, Chippenham Sites Allocation DPD, Malmesbury Neighbourhood Plan and Purton Neighbourhood Plan.

Site Name	Site area	Description/Comments
Salisbury		
Land at the Maltings and Central Car Park, Salisbury	TBC	Mixed use retail lead allocation. Not a suitable location for large scale industrial and logistics uses.
Churchfield & Engine Sheds, Salisbury	12.36 acres	Mixed use allocation including c. 1,100 dwellings. Poor access to strategic road network. Not a suitable location for large scale industrial and logistics uses.
Former Imerys Quarry, Salisbury	9.88 acres	The Salisbury City Neighborhood Plan has recently consulted on this site being developed for housing. Initial proposal of between 300 – 400 new homes. Access currently via a tunnel under the main railway line, so not suited to large volume of HGVs. Potential viability issues with redeveloping a former quarry. Not a suitable location for large scale industrial and logistics uses.
Fugglestone Road, Salisbury	20.76 acres	Mixed use allocation including c. 1,250 dwellings. Residential development already commenced by Persimmon Homes. Not a suitable location for large scale industrial and logistics uses.
Longhedge (Old Sarum), Salisbury	36.32 acres	Mixed use allocation including c. 450 dwellings. No longer available – being developed.
Porton Science Park, Porton Down, Salisbury	24 acres	Saved Salisbury District Plan allocation. Opened in January 2018 with Building A (Phase 1) which comprises workspace for health, life sciences and defense technology startups. Building B (Phase 2), an innovation centre, is planned for Summer 2022. Poor access to the strategic road network and very specialist. Not a suitable location for large scale industrial and logistics uses.
Rest of Wiltshire		
Horton Road, Devizes	21 acres	Allocated for business and incubator workspace. Bounded by residential dwellings on each side, could cause potential cohabitation issues.

		<p>Not serviced, quoting £200,000 per acre but with uplift provisions on grant of planning in favor of MOD.</p> <p>Not a suitable for largescale logistics uses.</p>
Kingston Farm and Moulton Estate, Bradford on Avon	19.77 acres	<p>Mixed use allocation including up to 150 dwellings.</p> <p>No longer available – completed.</p>
Hawkeridge Business Park, Westbury	35 acres	<p>Planning consent for up to 500,000 square foot of roadside, storage, distribution, manufacturing, and offices. Recently been marketed to residential developers.</p> <p>Not a suitable location for large scale industrial and logistics uses.</p>
Ashton Park Urban Extension, South East of Trowbridge	37 Acres	<p>Mixed use allocation including 2,600 dwellings. Poor connectivity to strategic road network.</p> <p>Not a suitable location for large scale industrial and logistics uses.</p>
UK Land Forces HQ, Wilton	7.41 acres	<p>Mixed use allocation including 450 dwellings. Developed by Redrow Homes.</p> <p>No longer available – completed.</p>
West Warminster Urban Extension, Warminster	14.83 acres	<p>Mixed use allocation including 900 dwellings. Several residential applications submitted by Redrow Homes and Persimmon. Poor connectivity to strategic road network.</p> <p>Not a suitable location for large scale industrial and logistics uses.</p>
Rowden Park Site, Chippenham	44.48 acres	<p>Outline planning application for urban extension approved in 2016 for residential, local centre, primary school, and public open space. Applicants were Crest Nicholson and Redcliffe Homes.</p> <p>Not suitable for large scale industrial and logistics</p>
Rawlings Green, Land at Rawlings Farm, Chippenham	12.36 acres	<p>Outline planning permission approved in 2018 for a mixed-use scheme including up to 650 dwellings and c. 12 acres of employment. Poor access to strategic road network, vehicular access is currently via a bridge over the railway line. Owned by KBC Developments Ltd</p> <p>Not a suitable location for large scale industrial and logistics uses.</p>
Land at Garden Centre, Malmesbury	6.6 acres	<p>Saved North Wiltshire District Plan allocation. Permission granted in September 2020 for a food store, improved garden centre and B1, B2 and B8. Total site area was 8.27 acres including Aldi's parcel. Remainder comprises 6.6 acres including the garden centre.</p> <p>Partially developed – Aldi store completed.</p>

Land at Mope Lane - part of Purton Brickworks and Penn Farm Industrial Estate	7 acres	<p>Saved North Wiltshire District Plan allocation. Owned by Hill UK Ltd.</p> <p>Poor access to strategic road network.</p> <p>Not a suitable location for large scale industrial and logistics uses.</p>
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8.3 Development Pipeline

Within this section we have analysed the wider development pipeline, incorporating unallocated sites, in Swindon and Wiltshire.

Site Name	Site Area	Description/comments
Swindon		
Great Stall, New Eastern Villages, Swindon	25 acres	<p>Outline consent obtained. Due to site constraints and presence of rapid transit route (bus route) the site will be focused more on 'mid-box' units sub 100,000 square foot.</p> <p>Not suitable for largescale industrial and logistics.</p>
Honda, South	400 + acres	<p>Existing manufacturing site that will require a new planning consent. This will not be contentious. Now owner is predominantly focused on 'large scale' warehousing.</p> <p>Will only consider leasehold opportunities.</p>
Spittleborough Farm	50 acres	<p>Not yet agreed with joint venture partner so delays on delivery. Not yet allocated land so unlikely to be available for 3+ years minimum.</p> <p>Uncertainty surrounding timescales of delivery.</p>
Land adjacent to Spittleborough	10 acres	<p>Greenfield site and currently not allocated for employment. Size and shape of site make it unsuitable for large scale warehousing.</p> <p>Not suitable for largescale industrial and logistics.</p>
Inlands Farm, Wanborough	c.90 acres	<p>Planning recently rejected for B1/B2/B8 development. Dismissed at appeal in January 2022. Majority of site already reserved by planning applicant- (Martin Tedham / Wasdell).</p>
K3 Keypoint, South Marston, Swindon	7 acres	<p>Owned by L&G – existing consent for Waste to Energy use. About to speculatively build a 118,500 square foot unit.</p> <p>Not equivalent timescales - already being brought forward.</p>
Ignition phase 2, Dorcan Swindon	10 acres	<p>Phase two has consent for a single 200,000 square foot which is likely to be built speculatively shortly. Already attracting pre-let interest.</p> <p>Not equivalent timescales - already being brought forward.</p>

Wichelstowe, South Swindon	37 acres	Allocated site south of M4. Likely to attract smaller employment uses. Infrastructure currently being implemented to facilitate site access.
Gateway North Groundwell Swindon	16.5 acres	Allocated site. Current planning for retail – application submitted for a single 108,693 square foot warehouse building.
Wiltshire		
Helix, Solstice Park, Amesbury	9 acres	<p>Helix forms part of the 160 acre mixed use Solstice Park.</p> <p>Phase 1 comprises 11 trade counter units ranging from c. 3,500 – 10,000 sq ft. Construction commenced in Q1 2021.</p> <p>Phase 2 comprises D&B opportunities ranging between 10,000 – 85,000 sq ft, limited to one large building of 50,000 sq ft. RO Group are unlikely to speculatively build Phase 2 and if they did this would not be until Phase 1 is complete (likely timeline of 18 months)</p> <p>Not suitable for largescale industrial and logistics.</p>
St Modwen Park, Chippenham	78 acres	Outline consent in place for entire site with 3No. detailed consents granted. Buildings ranging from 100,000 – 300,000 square foot planned. A valid competing site although current demand and pre let activity suggests that this could be taken up in the near future.
303 Interchange, Mere	6 acres	<p>Developer owned. Only ideal for small warehousing.</p> <p>Not suitable for largescale industrial and logistics.</p>
Castledown Business Park, Ludgershall	18 acres	<p>Small scale development designed to service the local area. Not suitable to logistics.</p> <p>Not suitable for largescale industrial and logistics.</p>
Upside Business Park, Roundpounds, Melksham SN12 8DB	14.6 acres	<p>Strategic employment site. Outline planning consent for B1, B2, B8.</p> <p>Targeting part residential.</p> <p>Not suitable for largescale industrial and logistics.</p>
South Trowbridge Trade Park	18.73 acres	<p>Consent for 357,362 square foot of B1/B2/B8. 70% is restricted to B1/B2 use with the remaining 30% for B8.</p> <p>The site is subject to a number of conditions before it becomes deliverable.</p> <p>Likely to be a mixed-use park or future residential.</p> <p>Location not suitable for largescale industrial and logistics</p>
Southpoint, Chippenham (Showell Farm)	31 acres	<p>Adjoins Rowden Park site.</p> <p>Employment allocation but also has outline planning permission (Planning Reference: N/13/00308/OUT) for employment development comprising 50,000sqm (Use classes: B1(b), B1(c), B2 with ancillary B1 (a), B8 and Ancillary B1 (a)).</p>

Bought by Baylis Estates.

Indicative 4 plots ranging from 5-9 acres each. Site will not be serviced until c 2023 at the earliest

The table above sets out a number of sites that currently available or being promoted for commercial development in Swindon and Wiltshire. As the table shows there are a limited number of sites that can deliver large scale warehousing suitable for logistics style premises. Many of the sites are either poorly located in relation to the strategic highway network or not available. Many are not even allocated for employment yet.

In Swindon the only currently viable site is the former Honda facility which has been recently acquired by developer Panattoni for warehouse development. The indications are that this site could provide in the region of 6-7 million square foot of large-scale logistics. Whilst this may seem a sizeable amount of pipeline stock the reality is that current demand profiles suggest that this may not be sufficient to accommodate occupiers needs in 3-4 years. As an example, JLL were trying to secure a site in Swindon for B&M Bargains new 1 million square foot facility circa 3 years ago. The site chosen was the Hills site on the A420 adjacent to what is now called Panattoni Park (formerly Symmetry Park). The council at the time said that there was sufficient supply in the area to satisfy this demand and would not grant a consent on the chosen site. A deal could not be agreed, and B&M bargains located elsewhere. The key point here however is that the Panattoni site, that was supposed to absorb demand for a number of years, has been taken up by a single occupier – namely Amazon for a 2.3 million square foot facility.

Therefore, whilst the redevelopment of the Honda facility, 6 million square foot may seem a sizeable pipeline in reality, this could be absorbed by a relatively small number of occupiers. The press is well aware of regional Gigafactory interest, as well as reported interest from Tesla. There are also a number of smaller requirements that are highly likely to take space at the Honda site, which could take up approaching 2.5 million square foot. Including but not limited to WH Smiths for 500,000 square foot, JLL's requirement for 1.3 million square foot in total of the 5 to 6 million pipeline.

Panattoni have also confirmed that they will only entertain leasehold transactions and no freehold disposals. This is an important differential as demand is increasingly being driven by more occupiers seeking freehold turnkey solutions.

There are other requirements which have locational requirements and are less footloose. The Wasdell Packaging is one such requirement where they argue that they need to be within 15 minutes driving distance of their existing facility in West Swindon and require the asset to be freehold. They are trying to secure a planning consent on unallocated land and are appealing the recent rejected planning decision. Interestingly, the local authority said that one of the reasons for rejection was that they could take space at Symmetry Park (now Panattoni Park) which has of course now all been let.

Wiltshire also has limited options for viable logistics development sites due to location and size constraints. The only immediately viable option in Wiltshire is St Modwen Park on Junction 17. This site has existing consents for 105,000 and 232,000 square foot. Interest levels for the whole site are extremely encouraging with a pre-let already agreed on 88,000 square foot and 106,000 square foot about to go under offer. As a result, proposals are likely to be accelerated to bring forward the remainder of the site. We suspect that the demand profile for this site will see it fully let in the near future. What has been proven since marketing commenced at Chippenham is that there is a large amount of pent-up demand from local companies who are keen to acquire new space and who have not had the opportunity in the past. Often these businesses do not want to have to relocate to larger centres such as Bristol or Swindon as they have an established workforce which they need to retain. As

mentioned above, the recent demand is not only just logistics but an increasing number of engineering and manufacturing businesses with larger and more skilled labour who can only seek to relocate close to existing operations.

The profile of requirements set out above show a strong of demand in the South West. This needs to be considered against the backdrop of a chronic lack of supply across the country which is seeing more and more demand become footloose in order to secure accommodation therefore expanding the catchment area for sites. The rise and continued strength of the distribution and logistics market is seeing the take up of space at unprecedented levels. Strategic sites that used to satisfy demand for 10-15 years are now being occupied within 4-5 years. The Symmetry Park site is clear evidence of this. It would be dangerous to assume that the Panattoni site in Swindon will satisfy the market for years to come as it certainly isn't a 'one size fits all' solution. The availability of freehold options is an important one, as is the key market component of competition.

Another factor is that occupiers' requirements are becoming larger and more bespoke which limits their ability to take existing Grade B stock. This also has to be reconciled with the issue that the environmental performance of buildings is under increased scrutiny. The rise of sustainability, and wider ESG considerations, which are likely to lead to increasing corporate demand for new logistics buildings with lower carbon emissions (including net zero buildings) and buildings which provide workers with healthier and safer working environments.

9 Supply Chain Analysis

This section provides an analysis of the site from a logistics occupiers perspective. We consider there is good potential for this plot to succeed in offering Big Box regional distribution centres for retailers, serving both London and the South West regions.

9.1 Regional Distribution

In regional distribution, customers are serviced directly from a network of regional distribution centres (RDCs). The RDCs will hold stock which will either come directly from suppliers or from a National Distribution Centre. An RDC will typically service a broad region rather than a single defined urban area, e.g., the South West.

Regional transshipment centres (related to a central distribution system) will be in similar locations to the RDCs but will not hold stock, they simply perform a cross-dock operation of orders from the NDC to the customer.

The location of a regional distribution centre will be determined by several factors, including:

- Access to labour in meeting their demands, including proximity to local amenities and road networks for potential employees' wellbeing.
- Access to a large population of consumers (i.e., the demand) based upon being able to serve local conurbations within a reasonable drive time.
- Good road connectivity to key national hub locations to (ideally within a 2.5-hour drive time).
- Access to various types of freight network.

Analysis shows that regional hotspots are primarily away from the centre of gravity (Midlands), providing closer access to the final consumers in areas of denser populations. At a micro-level the following areas tend to typically be the primary locations for regional distribution:

- Swindon - Avonmouth – Taunton
- Enfield - Thurrock
- M1/ M6/ A42 corridor
- South Manchester
- Newcastle
- Glasgow

However, there is high competition for labour in these areas, with occupiers beginning to struggle in recruiting locally due to the concentrated number of warehouses and warehouse type roles being offered.

The size of a regional facility can vary significantly (50,000 – 300,000 square foot) and will be determined by a number of factors:

- The location and number of final delivery points.
- The number of deliveries that need to be made per day.

- The vehicle types used (both in and out).
- The type and size of the goods and packaging.
- The number of additional services required (e.g., labelling, consolidation).

Amesbury is positioned in an ideal location to serve the South West area for any retailer or e-commerce operator. This has been proven by the neighbouring Solstice Park development as large organisations such as TJ Morris, Home Bargains, Tintometer and Greggs operating their Regional Distribution Centres here. In addition, other key players such as Muller Wiseman have a distribution centre here demonstrating Amesbury's appeal for big market players.

9.1.1 Competition

The majority of the units within the neighbouring Solstice Park are a smaller square footage and there are limited 'Big Box' units available e.g., Helix Phase 2 can only accommodate a single unit up to 50,000 sq ft. 'Big Box' units are considered to be anything over 100,000 square foot. There is currently a high demand for Big Box warehouses as supply chain competition increases as well as customer demands for speedy delivery. As discussed above, regional distribution centre requirements usually take up to 300,000 square foot. Therefore, potential for some big box warehouses would be attractive to occupiers serving the London and the South West.

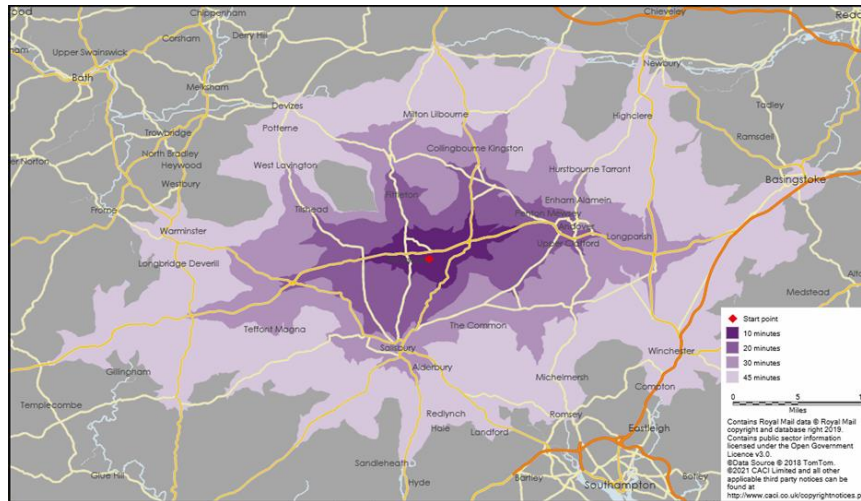
Competing South West hotspot areas for distribution include Bristol/Avonmouth and Swindon. Both of these common logistics hubs are highly saturated with operations and thus a higher competition to recruit for warehousing roles. For example, sites in Bristol are now having to use shuttle services to bring in a workforce from South Wales due to the concentration of demand and competition. The challenges in these typical logistics-centric areas may sway occupiers to consider locations where there is less competition whilst still maintaining excellent transport links for a top-level service to the South West regions.

9.1.2 Employment

Although there is a good level of employment surrounding the Amesbury area, the type of work available is skewed towards more office or corporate based roles. Being able to offer a wider variety of employment opportunities will draw people to the area from surrounding conurbations. In addition, an increase in competition amongst supply chains for the highest quality service sees a rise in automation being utilised within warehouses. This automation requires a smaller employee headcount but creates more appealing job roles to suit the local area.

We anticipate that those from the following highlighted areas would be able to commute daily to the site:

Figure 11: Drive times – up to 45 minutes



9.1.3 Drive Times

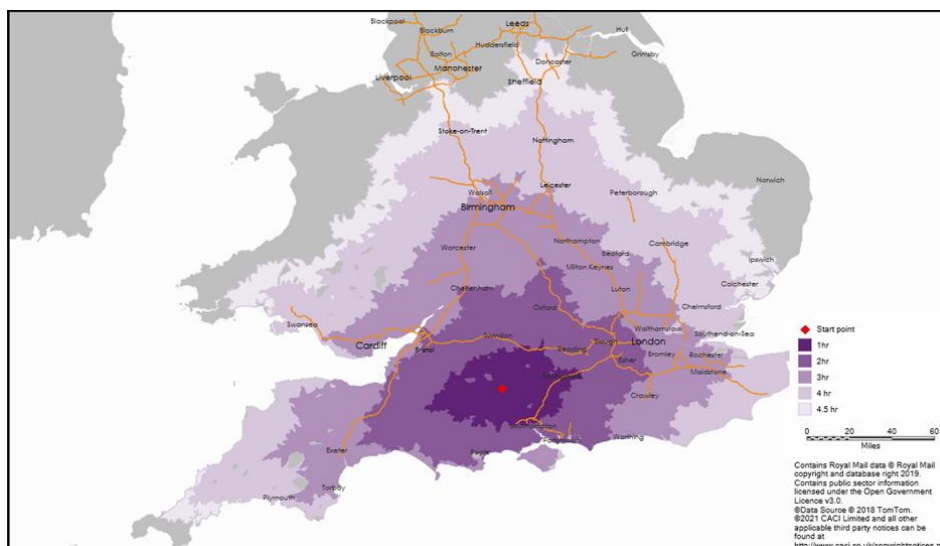
The motorway network has access to key nodes via the M3 to London and the M25, and north via the A34 to the M4 and M40. Being able to drive to London within 2.5-3 hours via HGV is an additional benefit for any occupier looking to serve the South and South West. This provides the opportunity for less than truck load (LTL) deliveries to be made to the surrounding area.

Depending on the occupier's operation, being located in Amesbury as opposed to Bristol could save thousands of transport mileage hours and costs. This is thanks to the shorter commuting distance to London, Southampton, and Portsmouth as well as other key South West nodes.

Within a 4.5-hour HGV drive time from Amesbury, key nodes such as Birmingham, Sheffield, Nottingham, Peterborough can be reached.

Furthermore, the site is strategically located for access to Southampton Port being only 41.7 miles away (via the A303). This appeals to occupiers whose models involve importing and exporting freight. Additionally, Heathrow Airport can be reached in less than 1.5 hours, boasting the UK's largest air freight/cargo volumes, again ideal for import and export.

Figure 12: Drive times – up to 4.5 hours



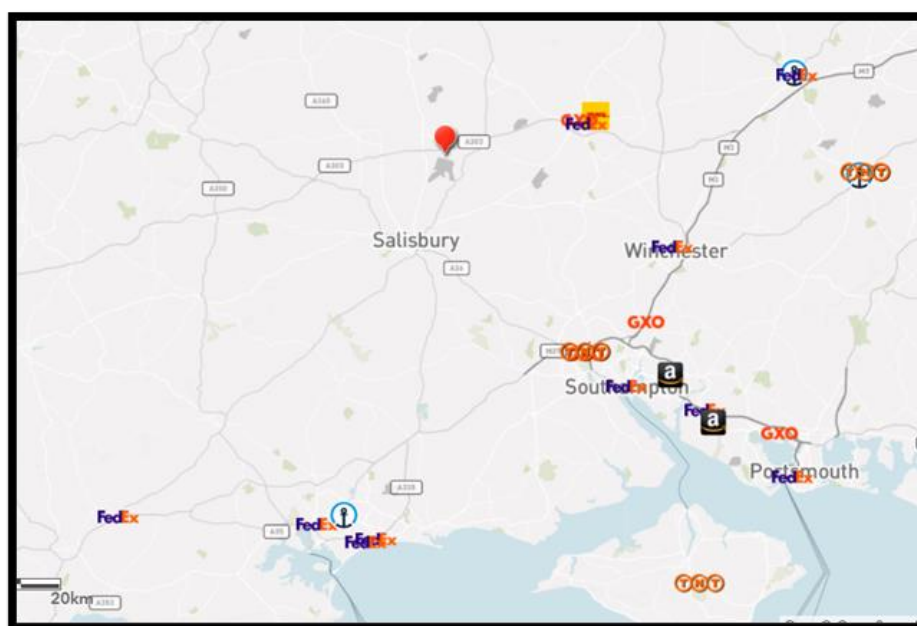
9.1.4 Parcel Carriers

The below map depicts the Amesbury site (with red location marker) against parcel carriers, 3PLs and Amazon DCs.

The A303 has already attracted the likes of GXO and DHL who operate distribution centres here. In addition, the FedEx hub being in close proximity benefits e-commerce distribution.

There are no Amazon distribution centres in the local area which benefits occupiers as typically competition rises greatly amongst areas in which Amazon operate. This is due to competition against the higher-than-average salaries that they offer.

Figure 13: Parcel Carriers location



9.1.5 Local Amenities

Proximity to the Solstice leisure park which hosts a number of cafes/restaurants (Costa Coffee, Holiday Inn, McDonalds, KFC, Pizza Hut etc.), retail outlets (B&M, Home Bargains, Screwfix, Lidl and Tesco), two gyms as well as a petrol station all add great appeal to occupiers as well as potential employees. Often distribution parks lack closeness to these types of amenities. Having such services nearby is beneficial to this area. In a labour market that is increasingly challenging, occupiers are increasingly focused on employee retention and engagement and therefore the concept of having a great place to work. Proximity to amenities and good transport routes would be attractive. In addition, creating more jobs in this area will improve the local economy.

10 Conclusions

Having undertaken the research and assessment required for the Market Review included in this report and referred to in item 1.1 Purpose, we confirm our opinion that the proposed extension of Solstice Park is deliverable and capable of providing **sufficient land of the appropriate type** to support growth and innovation in Amesbury and the wider District/ Region in the years ahead. This conclusion is based on the following:

- Based on the evidence set out in this report we consider the subject site of 63.5 ha (157 acres) for the extension of Solstice Park to be uniquely suitable in the Amesbury and wider Salisbury District /South Wiltshire areas for the development of Logistics, “Big Box” distribution and any other employment use.
- Growth in demand for logistics and “Big Box” distribution has increased dynamically in the last 3 years as a result *inter alia* of the growth of e-commerce, the Pandemic, Brexit, current fragility of supply chains and the rationalisation of such distribution, for both industry and retail, in the search for margin improvement, and the resultant high level of demand is anticipated to continue.
- Section 7 demonstrates the growth in demand reporting 28 enquiries for Big Boxes across the South West and an additional 14 enquiries for Big Boxes for Wiltshire specifically. We are also aware of several mid-box enquiries for Wiltshire, which although they fall outside of the Big Box market threshold, demonstrates that there is generally a shortage of available industrial/logistics development land.
- Alongside the growth of the logistics and “Big Box” distribution sector we are experiencing growing demand from a number of engineering and manufacturing businesses looking to relocate close to existing operations.
- From an occupier’s perspective the proposed extension to Solstice Park is positioned in an ideal location to serve the South West area for any retailer or e-commerce operator. The immediate access to the strategic road network means that key places such as Birmingham, Sheffield, Nottingham and Peterborough can be reached within a 4.5 hour HGV drive time. In addition to this the site is strategically located for occupiers importing/exporting goods via Southampton Port and Heathrow Airport.
- In addition to the above the growth in demand for logistics and “Big Box” distribution means competing South West hotspot areas such as Bristol/Avonmouth and Swindon are highly saturated with operations and thus a higher competition to recruit for warehousing roles. Furthermore, the proximity to the extensive range of services and facilities at Solstice Park increases the attractiveness of the subject site from an occupier perspective as distribution parks often lack these types of amenities, and those at Solstice Park have contributed materially to its success as an established (and now virtually fully built and occupied) Business Park.
- The employment generated by growth in up-to-date logistics and “Big Box” distribution has also increased as the sector has evolved to meet consumer demand for decreased delivery times by increasing their workforces to improve capacity as well as introducing automated systems which has increased the number of higher added value jobs associated with the sector.

- The proposed extension to Solstice Park is one of, if not “the” most sustainable locations for employment related development in South Wiltshire, due to its access and egress directly onto the A303 and access to the wider strategic network. It would contribute meaningfully to levelling up the employment opportunities in South Wiltshire compared to those habitually more numerous in North Wiltshire and would provide an attractive local alternative for those larger users currently located on the Churchfields Industrial Estate in Salisbury looking to expand. Solstice Park is proof that it is a suitable location for employment, confirmed by local and national business endorsement.
- The national policy context places a great importance on the need to support economic growth and productivity, specifically identifying the need for policies and decisions to recognise and address the specific locational requirements of different sectors. The NPPF specifically addresses the need to make provision for storage and distribution operations at a variety of scales and in suitably accessible locations.
- The local policy context applies this focus within the Core Strategy, identifying the need to provide the correct amount and type of employment provision to react to anticipated levels of growth over the plan period. The most relevant of which is Core Policy 34 which deals with additional employment land.
- Much of the relevant planning policy context is outdated and not reflective of the growth in demand from the logistics sector in particular during the last 3 years, having been formulated and adopted prior to these trends becoming readily identifiable. Most recently the Wiltshire Local Plan Review (2021) utilises evidence presented in the Swindon and Wiltshire Functional Economic Market Area Assessment (2016) and the Wiltshire Employment Land Review (2018) to form an important part of the evidence base for the emerging plan. These documents rely on evidence from 2015/2016 and 2018, which might explain the reason why the Planning for Amesbury (2021) consultation document concluded that: *“No further employment land is required in Amesbury given the existing provision in and around the area”*.
- We consider that there is significant evidence included within this Employment Land Statement to demonstrate that the emerging local plan does not go far enough to identify sufficient land of the right type, in the right places at the right time for the logistics and “Big Box” distribution sector.
- This report, and in particular its evidence, is market-based and up-to-date at the time of writing.

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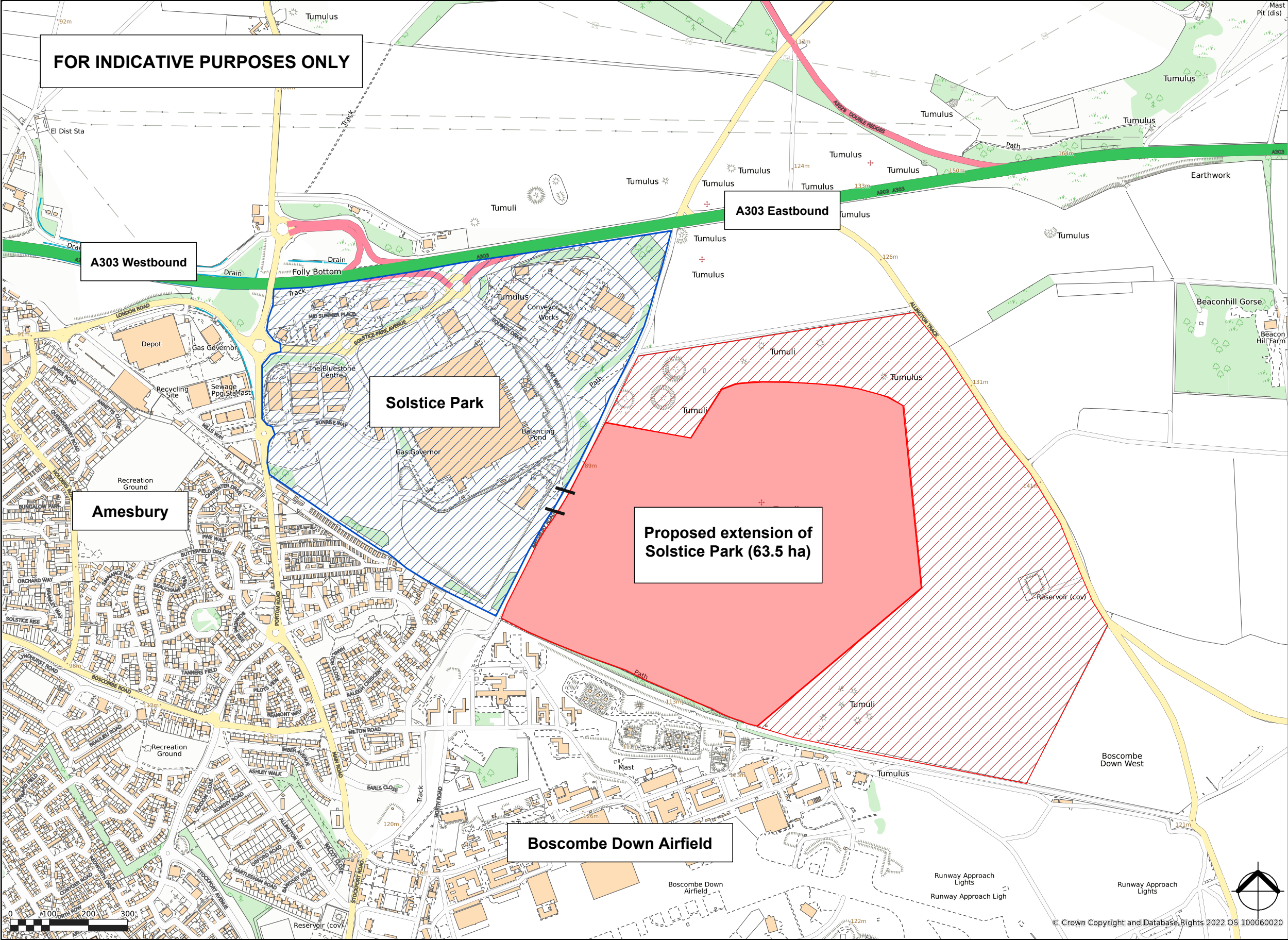
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Appendix 1

Proposed extension of Solstice Park site plan



Appendix 2

Solstice Park accommodation summary & plan

Accommodation Summary

Solstice Park, Amesbury, Wiltshire

Introduction

This Accommodation Summary Note has been produced by JLL on behalf of Lincoln College, Oxford and Classmaxi Ltd who are collectively working to promote the land adjoining Solstice Park for employment uses. This note, which will be appended to the Employment Land Statement, summarises the employment accommodation, associated service facilities and indicative employment generation at Solstice Park. The findings of our research are set out herein and the full set of data is attached.

Assumptions

We have set below the assumptions which have formed the basis of our research:

Assumption	Comment
Classification of Occupiers	<p>We have classified the occupiers at Solstice Park by adopting the following criteria:</p> <ul style="list-style-type: none">• Major Occupier – occupy in excess of 2,000 sqm• Smaller Occupier – occupy less than 2,000 sqm• Service Occupiers – supporting facilities/amenities located at Solstice Park <p>The above classifications correlate with the key on the attached plan.</p>
Building Areas	<p>To form our opinion of the building areas (both constructed and approved) we have adopted measurements provided by the Valuation Office Agency, planning documents or Energy Performance Certificates.</p> <p>We have clearly stated the source of our assumption and basis of measurement adopted per property as part of the full Accommodation Summary.</p>

Employment Numbers	<p>To determine the approximate employment numbers for Solstice Park we have adopted the employment figures provided as part of the planning permissions, where available. In the absence of this information, we have adopted the Government Employment Density Guide (2nd edition) to inform our calculations.</p> <p>We have set out the multipliers below:</p> <ul style="list-style-type: none"> • Light Industry (E(g)(iii) – Formerly B1c) at 47 sqm per FTE (NIA) • General Industrial (B2) at 36 sqm per FTE (GIA) • Warehouse and Distribution (B8) at 70 sqm per FTE (GEA) • Restaurants and Cafes (E(b) - Formerly A3) at 18 sqm per FTE (NIA) • High Street (E(a) - Formerly A1) at 19 sqm per FTE (NIA) • General Hotels (3 Star) (C1) at 1 employee per 3 bedrooms • Amusement and Entertainment Centres (E(d) – Formerly D2) at 70 sqm per FTE (GIA) <p>We have clearly labelled the source of our information within the full Accommodation Summary.</p>
Basis of Measurement	<p>Where the Employment Density Guide requires a different basis of measurement to that which is provided as part of the building areas, we have adopted the following conversions:</p> <ul style="list-style-type: none"> • Industrial GIA:GEA = 95% • Industrial NIA:GIA = 95%

Findings

Major Occupiers

There are 8 major occupiers located at Solstice Park which occupy a total floor space of 144,972 sqm (1,560,479 sq ft) and generate approximately 1,943 FTE jobs.

We have summarised our findings in the table below:

Occupier	Sqm	Sq Ft	Approx. FTE
Tintometer Limited	2,759	29,703	77
Birchall Tea	3,240	34,873	65
Storagebase	14,591	157,058	5
Animal Friends	2,050	22,065	205
Home Bargains*	2,752	29,619	1,200**
TJ Morris Limited*	100,408	1,080,794	

TJ Morris Limited*	1,813	19,515	
Greggs	7,650	82,345	260
Muller	6,015	64,745	79
Holiday Inn	3,694	39,762	52
TOTAL	144,972	1,560,479	1,943

**It should be noted that TJ Morris is the parent company to Home Bargains. Therefore, while the units are registered under different business entities, they are effective one and the same.*

***In accordance with our assumptions table at the start of this note, where available we have adopted the employment figures provided as part of planning application documents. In this instance TJ Morris provided a collective employment figure for their entire operation, therefore we cannot specify how this is broken down for each aspect.*

It should be noted that both Animal Friends and Homes Bargains have speculatively purchased 'future expansion' sites to protect their business interest and allow them to expand their existing operations without having to relocate. These areas have been shaded green on the plan. We have not included these 'future expansion' sites within our calculations due to a lack of information of their future use and the associated floor space and employment generation.

Smaller Occupiers

There are 35 smaller occupiers located at Solstice Park which occupy a total floor space of 9,555 sqm (102,846 sq ft) which equates to approximately 256 FTE jobs. There is also a further 3,517 sqm (37,856 sq ft) under construction at Helix Park (Phase 1), which once complete could provide in the region of 98 FTE jobs.

We have summarised our findings in the table below:

Occupier	Sqm	Sq Ft	Approx. FTE
M W Duckett Ltd	208	2,237	4
Bluestone Canine Hydrotherapy	137	1,475	3
Solstice Hot Tubs	137	1,475	3
Gem FS Ltd	137	1,475	13
Charlecotes Original Oak Flooring	137	1,475	3
Hassett Industries	269	2,898	7
RCH Building Solutions Ltd	137	1,475	4
Spire Imports	137	1,475	4
Seamach Energy	137	1,475	4
MDH Defence	208	2,237	6
Vetimed	374	4,023	10
There4U	138	1,485	13
MDH Defence	138	1,485	4
Equidae Equine Services	140	1,512	3

Nationwide Engineering	276	2,970	6
Southern Quarter Coffee Shop	137	1,475	3
JK Carpets	290	3,117	6
Wessex Archaeology	376	4,047	10
Signs Express	213	2,292	4
Howdens	863	9,291	17
Bluestone Windows & Plastics	282	3,031	6
Screwfix	492	5,293	10
Express Motor Workshop	446	4,799	12
Southern Quarter	1,189	12,798	18
S J Morris Ltd	156	1,679	4
The Vault	350	3,766	5
Specialist Small Craft	160	1,722	4
Wessex Truck and Trailers Supplies	656	7,061	18
Spire Glass Ltd	224	2,413	6
Lovell Partnerships	221	2,378	6
Denleigh	218	2,347	6
Pro Media	254	2,729	7
Senzati Limited	593	6,381	16
Great Western Ambulance Service	175	1,887	5
Gristwood & Toms Ltd	174	1,875	5
Rezizt	525	5,651	15
Biden	178	1,914	5
Helix Park Phase 1 - Under Construction	3,517	37,856	98
TOTAL	13,072	140,702	353

Service Occupiers

There are 12 service occupiers located at Solstice Park, with another 2 under construction. When complete the 14 services occupiers will occupy a total of 11,822 sqm (127,257 sq ft) of accommodation and generate approximately 241 FTE jobs.

We have summarised our findings in the table below:

Occupier	Sqm	Sq Ft	Approx. FTE
Greggs - Under Construction	168	1,808	9
Taco Bell - Under Construction	168	1,808	9
Toby Carvery	310	3,337	16
McDonalds	366	3,940	19
Costa	212	2,280	11
KFC	209	2,250	11

Pizza Hut	311	3,348	16
Holiday Inn	3,694	39,762	52
Co-op	305	3,283	15
Harvester	647	6,964	34
Screwfix	492	5,293	10
Howden	863	9,291	17
Home Bargains*	2,752	29,619	0
Southern Quarter Coffee Shop & Gym	1,326	14,273	21
TOTAL	11,822	127,247	241

**As stated above the employment figures for TJ Morris and Home Bargains are provided as a combined figure for their entire operation. Therefore, we cannot provide a breakdown for the Retail Training Centre listed above.*

There are also three additional service occupiers located adjacent to Solstice Park on London Road, which further enhance the service offering to occupiers located at Solstice Park. We have listed the details of these below:

Occupier	Sqm*	Sq Ft	Parking Spaces	Distance to Solstice Park
Lidl	1,358	14,617	102	0.2 miles / 4 minute walk
Tesco	5,427	58,416	358	0.6 miles / 12 minute walk
B&M	2,600	27,986	104	0.5 miles / 12 minute walk

**The areas stated within this table are based on the figures provided as part of the planning application documents.*

Summary

Overall, there are 53 occupiers at Solstice Park including major, minor and service occupiers. The total accommodation extends to approximately 197,308 sqm (2,123,827 sq ft) of which 159,819 sqm (1,720,292 sq ft) has been built, 3,853 sqm (41,473 sq ft) is under construction and 33,636 sqm (362,062 sq ft) has been reserved for future phases by owner occupiers. The as built accommodation creates approximately 2,470 FTE with the under construction and future expansion space providing an additional 1,043 FTE once constructed.



Table 1: Accommodation Schedule

Includes as built, under construction and with planning permission



Address	Occupier	Floor Area Source	Measurement	Size sqm	Size Sqft	Occupier Type	Use Class	Nature of Activity	Approx. FTE	Source	Use Class for FTE
Mid Summer Place SP4 75Q	Greggs - Under Construction	Planning	GIA	168	1,808	Services	E(b) - Formerly A3	F&B - Under Construction	9	Gov. Employment Density Guide	A3
Mid Summer Place SP4 75Q	Taco Bell - Under Construction	Planning	GIA	168	1,808	Services	E(b) - Formerly A3	F&B - Under Construction	9	Gov. Employment Density Guide	A3
Mid Summer Place SP4 75Q	Toby Carvery	EPC	GIA	310	3,337	Services	E(b) - Formerly A3	F&B	16	Gov. Employment Density Guide	A3
Mid Summer Place, SP4 75Q	McDonalds	VOA	GIA	366	3,940	Services	E(b) - Formerly A3	F&B	19	Gov. Employment Density Guide	A3
Mid Summer Place, SP4 75Q	Costa	VOA	GIA	212	2,280	Services	E(b) - Formerly A3	F&B	11	Gov. Employment Density Guide	A3
Mid Summer Place, SP4 75Q	KFC	EPC	GIA	209	2,250	Services	E(b) - Formerly A3	F&B	11	Gov. Employment Density Guide	A3
Mid Summer Place, SP4 75Q	Pizza Hut	EPC	GIA	311	3,348	Services	E(b) - Formerly A3	F&B	16	Gov. Employment Density Guide	A3
Mid Summer Place, SP4 75Q	Holiday Inn	EPC	GIA	3,694	39,762	Major	C1	Hotel and Restaurant	52	Gov. Employment Density Guide	C1 (General 3 Star)
Mid Summer Place, SP4 75Q	Co-op	EPC	GIA	305	3,283	Services	E(a) - Formerly A1	Retail/Petrol Station	15	Gov. Employment Density Guide	A1 (High Street)
The Amesbury Archer, Mid Summer Place, SP4 75Q	Harvester	EPC	GIA	647	6,964	Services	E(b) - Formerly A3	F&B	34	Gov. Employment Density Guide	A3
Lovibond House, Sun Rise Way, SP4 7GR	Tintometer Limited	VOA	GIA	2,759	29,703	Major	B2	Water testing and colour monitoring	77	Gov. Employment Density Guide	B2
1 The Bluestone Centre, Sun Rise Way	M W Duckett Ltd	VOA	GIA	208	2,237	Smaller	E(g)(iii) - Formerly B1(c)	Kitchen and Bathroom Showroom	4	Gov. Employment Density Guide	B1c
2 The Bluestone Centre, Sun Rise Way	Bluestone Canine Hydrotherapy	VOA	GIA	137	1,475	Smaller	E(g)(iii) - Formerly B1(c)	Dog Hydrotherapy	3	Gov. Employment Density Guide	B1c
3 The Bluestone Centre, Sun Rise Way	Solstice Hot Tubs	VOA	GIA	137	1,475	Smaller	E(g)(iii) - Formerly B1(c)	Hot Tubs	3	Gov. Employment Density Guide	B1c
4 The Bluestone Centre, Sun Rise Way	Gem FS Ltd	VOA	GIA	137	1,475	Smaller	E(g)(iii) - Formerly B1(c)	Financial Planning	13	Gov. Employment Density Guide	B1a (Business Park)
5 The Bluestone Centre, Sun Rise Way	Charlecotes Original Oak Flooring	VOA	GIA	137	1,475	Smaller	E(g)(iii) - Formerly B1(c)	Flooring	3	Gov. Employment Density Guide	B1c
6 The Bluestone Centre, Sun Rise Way	Hassett Industries	VOA	GIA	269	2,898	Smaller	B2	Infrared Heating Products	7	Gov. Employment Density Guide	B2
8 The Bluestone Centre, Sun Rise Way	RCH Building Solutions Ltd	VOA	GIA	137	1,475	Smaller	B2	Building Contractors and Developers	4	Gov. Employment Density Guide	B2
9 The Bluestone Centre, Sun Rise Way	Spire Imports	VOA	GIA	137	1,475	Smaller	B2	Wholesaler	4	Gov. Employment Density Guide	B2
10 The Bluestone Centre, Sun Rise Way	Seamach Energy	VOA	GIA	137	1,475	Smaller	B2	Renewable Energy Engineering	4	Gov. Employment Density Guide	B2
12 The Bluestone Centre, Sun Rise Way	MDH Defence	VOA	GIA	208	2,237	Smaller	B2	Defence technology	6	Gov. Employment Density Guide	B2
14 The Bluestone Centre, Sun Rise Way	Vetimed	VOA	GIA	374	4,023	Smaller	B2	Vet Supplies	10	Gov. Employment Density Guide	B2
15 The Bluestone Centre, Sun Rise Way											
16 The Bluestone Centre, Sun Rise Way	There4U	VOA	GIA	138	1,485	Smaller	E(g)(iii) - Formerly B1(c)	Home Care Agency	13	Gov. Employment Density Guide	B1a (Business Park)
17 The Bluestone Centre, Sun Rise Way	MDH Defence	VOA	GIA	138	1,485	Smaller	B2	Defence technology	4	Gov. Employment Density Guide	B2
18 The Bluestone Centre, Sun Rise Way	Equidae Equine Services	VOA	GIA	140	1,512	Smaller	E(g)(iii) - Formerly B1(c)	Equine Pet Store	3	Gov. Employment Density Guide	B1c
11 The Bluestone Centre, Sun Rise Way	Nationwide Engineering	VOA	GIA	276	2,970	Smaller	E(g)(iii) - Formerly B1(c)	Developers and Contractors	6	Gov. Employment Density Guide	B1c
19 The Bluestone Centre, Sun Rise Way											
20 The Bluestone Centre, Sun Rise Way	Southern Quarter Coffee Shop	VOA	GIA	137	1,475	Services	E(g)(iii) - Formerly B1(c)	Café	3	Gov. Employment Density Guide	B1c
21 The Bluestone Centre, Sun Rise Way											
22 The Bluestone Centre, Sun Rise Way	JK Carpets	VOA	GIA	290	3,117	Smaller	E(g)(iii) - Formerly B1(c)	Carpets	6	Gov. Employment Density Guide	B1c
23 The Bluestone Centre, Sun Rise Way											
24 The Bluestone Centre, Sun Rise Way	Wessex Archaeology	VOA	GIA	376	4,047	Smaller	B2	Archaeological finds storage	10	Gov. Employment Density Guide	B2
25 The Bluestone Centre, Sun Rise Way	Signs Express	VOA	GIA	213	2,292	Smaller	E(g)(iii) - Formerly B1(c)	Signage and Graphics	4	Gov. Employment Density Guide	B1c
26 The Bluestone Centre, Sun Rise Way											
27 The Bluestone Centre, Sun Rise Way											
28 The Bluestone Centre, Sun Rise Way	Howdens	VOA	GIA	863	9,291	Smaller	E(g)(iii) - Formerly B1(c)	Builders Merchant	17	Gov. Employment Density Guide	B1c
35 The Bluestone Centre, Sun Rise Way											
36 The Bluestone Centre, Sun Rise Way											
37 The Bluestone Centre, Sun Rise Way											
29 The Bluestone Centre, Sun Rise Way	Bluestone Windows & Plastics	VOA	GIA	282	3,031	Smaller	E(g)(iii) - Formerly B1(c)	Window Showroom	6	Gov. Employment Density Guide	B1c
34 The Bluestone Centre, Sun Rise Way											
30 The Bluestone Centre, Sun Rise Way											
31 The Bluestone Centre, Sun Rise Way	Screwfix	VOA	GIA	492	5,293	Smaller	E(g)(iii) - Formerly B1(c)	Builders Merchant	10	Gov. Employment Density Guide	B1c
32 The Bluestone Centre, Sun Rise Way											
33 The Bluestone Centre, Sun Rise Way											
38 The Bluestone Centre, Sun Rise Way	Birchall Tea	VOA	GIA	3,240	34,873	Major	E(g)(iii) - Formerly B1(c)	Packaging and Distribution	65	Gov. Employment Density Guide	B1c
39 The Bluestone Centre, Sun Rise Way	Express Motor Workshop	VOA	GIA	446	4,799	Smaller	B2	Garage and MOT Centre	12	Gov. Employment Density Guide	B2
40 The Bluestone Centre, Sun Rise Way	Vacant	VOA	GIA	252	2,710	Smaller	B2	Vacant	7	Gov. Employment Density Guide	B2
1 The Sarsen Centre	Storagebase	Planning	GIA	14,591	157,058	Major	B8	Self Storage	5	Planning	N/A
2 The Sarsen Centre, SP4 7YR	Southern Quarter	EPC	GIA	1,189	12,798	Services	E(d) - Formerly D2	Gym	18	Gov. Employment Density Guide	D2
1-2 The Crescent, SP4 7QA	Animal Friends	VOA	NIA	2,050	22,065	Major	E(g)(i) - Formerly B1(a)	Pet Insurance	205	Gov. Employment Density Guide	B1a (Business Park)
3-4 The Crescent, SP4 7QA	Animal Friends - Not Built	Planning	NIA	5,450	58,665	Major	E(g)(i) - Formerly B1(a)	Not Built	545	Gov. Employment Density Guide	B1a (Business Park)
Solstice Park Avenue, SP4 7RS	Home Bargains	VOA	GIA	2,752	29,619	Major	E(g)(i) - Formerly B1(a)	Retail Training Centre			
Meridian Way, SP4 7SH	TJ Morris Limited	VOA	GIA	100,408	1,080,794	Major	B8	Regional distribution centre	1,200	Planning	N/A
Equinox Drive	TJ Morris Limited	Planning	GIA	1,813	19,515	Major	Sui Generis	Vehicle Maintenance			
Meridian Way, SP4 7SH	TJ Morris Limited - Not Built	Planning	GIA	14,400	155,002	Major	B8	Warehouse - Not Built			
Equinox Drive	Greggs	Planning	GIA	7,650	82,345	Major	B8	Regional Distribution Centre	260	Planning	N/A
Solar Way	S Morris Ltd	Planning	GIA	156	1,679	Smaller	B2	Concrete Plant	4	Gov. Employment Density Guide	B2
Solar Way	Muller	VOA	GIA	6,015	64,745	Major	B2	Regional distribution centre	79	Gov. Employment Density Guide	B8
101 The Beacon Centre	Cubic Lvc	VOA	NIA	1,137	12,239	Major	E(g)(i) - Formerly B1(a)	LVC Training	114	Gov. Employment Density Guide	B1a (Business Park)
102 The Beacon Centre	Not Built	Planning	GIA	780	8,396	Smaller	E(g)(iii)/B2/B8 - Formerly B1(c)/B2/B8	Not Built	22	Gov. Employment Density Guide	B2

103 - The Beacon Centre	The Vault	VOA	GIA	350	3,766	Smaller	E(d) - Formerly D2	Gymnastics & Fitness Centre	5	Gov. Employment Density Guide	D2
104 - The Beacon Centre	Specialist Small Craft	VOA	GIA	160	1,722	Smaller	B2	Craft	4	Gov. Employment Density Guide	B2
201 - The Beacon Centre	Wessex Truck and Trailers Supplies	VOA	GIA	656	7,061	Smaller	B2	Car Supplies	18	Gov. Employment Density Guide	B2
202 - The Beacon Centre										Gov. Employment Density Guide	
205 - The Beacon Centre										Gov. Employment Density Guide	
203 - The Beacon Centre	Spire Glass Ltd	VOA	GIA	224	2,413	Smaller	B2	Window Manufacturing	6	Gov. Employment Density Guide	B2
204 - The Beacon Centre	Lovell Partnerships	VOA	GIA	221	2,378	Smaller	B2	Property Builders/ Maintenance	6	Gov. Employment Density Guide	B2
206 - The Beacon Centre	Denleigh	VOA	GIA	218	2,347	Smaller	B2	Door Supplier	6	Gov. Employment Density Guide	B2
207 - The Beacon Centre	Vacant	VOA	GIA	218	2,343	Smaller	B2	Vacant	6	Gov. Employment Density Guide	B2
208 - The Beacon Centre	Pro Media	VOA	GIA	254	2,729	Smaller	B2	Marketing Agency	7	Gov. Employment Density Guide	B2
209 - The Beacon Centre	Senzati Limited	VOA	GIA	593	6,381	Smaller	B2	Bespoke Vehicles	16	Gov. Employment Density Guide	B2
210 - The Beacon Centre										Gov. Employment Density Guide	
211 - The Beacon Centre	Great Western Ambulance Service	VOA	GIA	175	1,887	Smaller	B2	Ambulance Station	5	Gov. Employment Density Guide	B2
212 - The Beacon Centre	Gristwood &Toms Ltd	VOA	GIA	174	1,875	Smaller	B2	Arboricultural Consultant	5	Gov. Employment Density Guide	B2
213 - The Beacon Centre	Rezitz	VOA	GIA	525	5,651	Smaller	B2	Bespoke Protection	15	Gov. Employment Density Guide	B2
215 - The Beacon Centre										Gov. Employment Density Guide	
214 - The Beacon Centre	Biden	VOA	GIA	178	1,914	Smaller	B2	Facilities Managers	5	Gov. Employment Density Guide	B2
Helix Trade Park	Under Construction	Planning	GIA	3,517	37,856	Smaller	E(g)(iii)/B2/B8 - Formerly B1(c)/B2/B8	Trade Park - Under Construction	98	Gov. Employment Density Guide	B2
Helix Phase 2	Planning Permission - Not Built	Planning	GIA	13,006	140,000	Smaller	E(g)(iii)/B2/B8 - Formerly B1(c)/B2/B8	Planning permission - Not Built	361	Gov. Employment Density Guide	B2

TOTAL				197,308	2,123,827				3,513		
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AS BUILT				159,819	1,720,292				2,470		
UNDER CONSTRUCTION				3,853	41,473				115		
NOT BUILT				33,636	362,062				928		

Table 2: Major Occupiers

Includes as built and occupied or under construction



Address	Occupier	Floor Area Source	Measurement	Size sqm	Size Sqft	Occupier Type	Use Class	Nature of Activity	Approx. FTE	Source	Use Class for FTE
Lovibond House, Sun Rise Way, SP4 7GR	Tintometer Limited	VOA	GIA	2,759	29,703	Major	B2	Water testing and colour monitoring	77	Gov. Employment Density Guide	B2
38 The Bluestone Centre, Sun Rise Way	Birchall Tea	VOA	GIA	3,240	34,873	Major	E(g)(iii) - Formerly B1(c.)	Tea Factory	65	Gov. Employment Density Guide	B1c
1 The Sarsen Centre	Storagebase	Planning	GIA	14,591	157,058	Major	B8	Self Storage	5	Planning	N/A
1-2 The Crescent, SP4 7QA	Animal Friends	VOA	NIA	2,050	22,065	Major	E(g)(i) - Formerly B1(a)	Pet Insurance	205	Gov. Employment Density Guide	B1a (Business Park)
Solstice Park Avenue, SP4 7RS	Home Bargains	VOA	GIA	2,752	29,619	Major	E(g)(i) - Formerly B1(a)	Retail Training Centre	1,200	N/A	N/A
Meridian Way, SP4 7SH	TJ Morris Limited	VOA	GIA	100,408	1,080,794	Major	B8	Regional distribution centre			
Equinox Drive	TJ Morris Limited	Planning	GIA	1,813	19,515	Major	Sui Generis	Vehicle Maintenance	260	Planning	N/A
Equinox Drive	Greggs	Planning	GIA	7,650	82,345	Major	B8	Distribution Centre			
Solar Way	Muller	VOA	GIA	6,015	64,745	Major	B2	Regional distribution centre	79	Gov. Employment Density Guide	B8
Mid Summer Place, SP4 7SQ	Holiday Inn	EPC	GIA	3,694	39,762	Major	C1	Hotel and Restaurant	52	Gov. Employment Density Guide	C1 (General 3 Star)
TOTAL				144,972	1,560,479				1,943		

Table 3: Smaller Occupiers

Includes as built and occupied or under construction



Address	Occupier	Floor Area Source	Measurement	Size sqm	Size Sqft	Occupier Type	Use Class	Nature of Activity	Approx. FTE	Source	Use Class for FTE
1 The Bluestone Centre, Sun Rise Way	M W Duckett Ltd	VOA	GIA	208	2,237	Smaller	E(g)(iii) - Formerly B1(c.)	Kitchen and Bathroom Showroom	4	Gov. Employment Density Guide	B1c
2 The Bluestone Centre, Sun Rise Way	Bluestone Canine Hydrotherapy	VOA	GIA	137	1,475	Smaller	E(g)(iii) - Formerly B1(c.)	Dog Hydrotherapy	3	Gov. Employment Density Guide	B1c
3 The Bluestone Centre, Sun Rise Way	Solstice Hot Tubs	VOA	GIA	137	1,475	Smaller	E(g)(iii) - Formerly B1(c.)	Hot Tubs	3	Gov. Employment Density Guide	B1c
4 The Bluestone Centre, Sun Rise Way	Gem FS Ltd	VOA	GIA	137	1,475	Smaller	E(g)(iii) - Formerly B1(c.)	Financial Planning	13	Gov. Employment Density Guide	B1a (Business Park)
5 The Bluestone Centre, Sun Rise Way	Charlecotes Original Oak Flooring	VOA	GIA	137	1,475	Smaller	E(g)(iii) - Formerly B1(c.)	Flooring	3	Gov. Employment Density Guide	B1c
6 The Bluestone Centre, Sun Rise Way	Hassett Industries	VOA	GIA	269	2,898	Smaller	B2	Infrared Heating Products	7	Gov. Employment Density Guide	B2
7 The Bluestone Centre, Sun Rise Way											
8 The Bluestone Centre, Sun Rise Way	RCH Building Solutions Ltd	VOA	GIA	137	1,475	Smaller	B2	Building Contractors and Developers	4	Gov. Employment Density Guide	B2
9 The Bluestone Centre, Sun Rise Way	Spire Imports	VOA	GIA	137	1,475	Smaller	B2	Wholesaler	4	Gov. Employment Density Guide	B2
10 The Bluestone Centre, Sun Rise Way	Seamach Energy	VOA	GIA	137	1,475	Smaller	B2	Renewable Energy Engineering	4	Gov. Employment Density Guide	B2
12 The Bluestone Centre, Sun Rise Way	MDH Defence	VOA	GIA	208	2,237	Smaller	B2	Defence technology	6	Gov. Employment Density Guide	B2
14 The Bluestone Centre, Sun Rise Way	Vetimed	VOA	GIA	374	4,023	Smaller	B2	Vet Supplies	10	Gov. Employment Density Guide	B2
15 The Bluestone Centre, Sun Rise Way											
16 The Bluestone Centre, Sun Rise Way	There4U	VOA	GIA	138	1,485	Smaller	E(g)(iii) - Formerly B1(c.)	Home Care Agency	13	Gov. Employment Density Guide	B1a (Business Park)
17 The Bluestone Centre, Sun Rise Way	MDH Defence	VOA	GIA	138	1,485	Smaller	B2	Defence technology	4	Gov. Employment Density Guide	B2
18 The Bluestone Centre, Sun Rise Way	Equidae Equine Services	VOA	GIA	140	1,512	Smaller	E(g)(iii) - Formerly B1(c.)	Equine Pet Store	3	Gov. Employment Density Guide	B1c
11 The Bluestone Centre, Sun Rise Way	Nationwide Engineering	VOA	GIA	276	2,970	Smaller	E(g)(iii) - Formerly B1(c.)	Developers and Contractors	6	Gov. Employment Density Guide	B1c
19 The Bluestone Centre, Sun Rise Way											
21 The Bluestone Centre, Sun Rise Way	JK Carpets	VOA	GIA	290	3,117	Smaller	E(g)(iii) - Formerly B1(c.)	Carpets	6	Gov. Employment Density Guide	B1c
22 The Bluestone Centre, Sun Rise Way											
23 The Bluestone Centre, Sun Rise Way	Wessex Archaeology	VOA	GIA	376	4,047	Smaller	B2	Archaeological finds sotrage	10	Gov. Employment Density Guide	B2
24 The Bluestone Centre, Sun Rise Way											
25 The Bluestone Centre, Sun Rise Way	Signs Express	VOA	GIA	213	2,292	Smaller	E(g)(iii) - Formerly B1(c.)	Signage and Graphics	4	Gov. Employment Density Guide	B1c
26 The Bluestone Centre, Sun Rise Way											
27 The Bluestone Centre, Sun Rise Way											
28 The Bluestone Centre, Sun Rise Way	Howdens	VOA	GIA	863	9,291	Smaller	E(g)(iii) - Formerly B1(c.)	Builders Merchant	17	Gov. Employment Density Guide	B1c
35 The Bluestone Centre, Sun Rise Way											
36 The Bluestone Centre, Sun Rise Way											
37 The Bluestone Centre, Sun Rise Way											
29 The Bluestone Centre, Sun Rise Way	Bluestone Windows & Plastics	VOA	GIA	282	3,031	Smaller	E(g)(iii) - Formerly B1(c.)	Window Showroom	6	Gov. Employment Density Guide	B1c
34 The Bluestone Centre, Sun Rise Way											
30 The Bluestone Centre, Sun Rise Way											
31 The Bluestone Centre, Sun Rise Way	Screwfix	VOA	GIA	492	5,293	Smaller	E(g)(iii) - Formerly B1(c.)	Builders Merchant	10	Gov. Employment Density Guide	B1c
32 The Bluestone Centre, Sun Rise Way											
33 The Bluestone Centre, Sun Rise Way											
39 The Bluestone Centre, Sun Rise Way	Express Motor Workshop	VOA	GIA	446	4,799	Smaller	B2	Garage and MOT Centre	12	Gov. Employment Density Guide	B2
Solar Way	S Morris Ltd	Planning	GIA	156	1,679	Smaller	B2	Concrete Plant	4	Gov. Employment Density Guide	B2
103 The Beacon Centre	The Vault	VOA	GIA	350	3,766	Smaller	E(d) - Formerly D2	Gymnastics & Fitness Centre	5	Gov. Employment Density Guide	D2
104 The Beacon Centre	Specialist Small Craft	VOA	GIA	160	1,722	Smaller	B2	Craft	4	Gov. Employment Density Guide	B2
201 - The Beacon Centre											
202 - The Beacon Centre	Wessex Truck and Trailers Supplies	VOA	GIA	656	7,061	Smaller	B2	Car Supplies	18	Gov. Employment Density Guide	B2
205 - The Beacon Centre											
203 - The Beacon Centre	Spire Glass Ltd	VOA	GIA	224	2,413	Smaller	B2	Window Manufacturing	6	Gov. Employment Density Guide	B2
204 - The Beacon Centre	Lovell Partnerships	VOA	GIA	221	2,378	Smaller	B2	Property Builders/ Maintenance	6	Gov. Employment Density Guide	B2
206 - The Beacon Centre	Denleigh	VOA	GIA	218	2,347	Smaller	B2	Door Supplier	6	Gov. Employment Density Guide	B2
208 - The Beacon Centre	Pro Media	VOA	GIA	254	2,729	Smaller	B2	Marketing Agency	7	Gov. Employment Density Guide	B2
209 - The Beacon Centre											
210 - The Beacon Centre	Senzati Limited	VOA	GIA	593	6,381	Smaller	B2	Bespoke Vehicles	16	Gov. Employment Density Guide	B2
211 - The Beacon Centre											
211 - The Beacon Centre	Great Western Ambulance Service	VOA	GIA	175	1,887	Smaller	B2	Ambulance Station	5	Gov. Employment Density Guide	B2
212 - The Beacon Centre	Gristwood &Toms Ltd	VOA	GIA	174	1,875	Smaller	B2	Arboricultural Consultant	5	Gov. Employment Density Guide	B2
213 - The Beacon Centre											
213 - The Beacon Centre	Rezist	VOA	GIA	525	5,651	Smaller	B2	Bespoke Protection	15	Gov. Employment Density Guide	B2
215 - The Beacon Centre											
214 - The Beacon Centre	Biden	VOA	GIA	178	1,914	Smaller	B2	Facilities Managers	5	Gov. Employment Density Guide	B2
Helix Trade Park	Under Construction	Planning	GIA	3,517	37,856	Smaller	E(g)(iii)/B2/B8 - Formerly B1(c)/B2/B8	Trade Park - Under Construction	98	Gov. Employment Density Guide	B2
TOTAL				13,072	140,702				353		

Table 4: Service Occupiers

Includes as built and occupied or under construction



Address	Occupier	Floor Area Source	Measurement	Size sqm	Size Sqft	Occupier Type	Use Class	Nature of Activity	Approx. FTE	Source	Use Class for FTE
Mid Summer Place SP4 7SQ	Greggs - Under Construction	Planning	GIA	168	1,808	Services	E(b) - Formerly A3	F&B - Under Construction	9	Gov. Employment Density Guide	A3
Mid Summer Place SP4 7SQ	Taco Bell - Under Construction	Planning	GIA	168	1,808	Services	E(b) - Formerly A3	F&B - Under Construction	9	Gov. Employment Density Guide	A3
Mid Summer Place SP4 7SQ	Toby Carvery	EPC	GIA	310	3,337	Services	E(b) - Formerly A3	F&B	16	Gov. Employment Density Guide	A3
Mid Summer Place, SP4 7SQ	McDonalds	VOA	GIA	366	3,940	Services	E(b) - Formerly A3	F&B	19	Gov. Employment Density Guide	A3
Mid Summer Place, SP4 7SQ	Costa	VOA	GIA	212	2,280	Services	E(b) - Formerly A3	F&B	11	Gov. Employment Density Guide	A3
Mid Summer Place, SP4 7SQ	KFC	EPC	GIA	209	2,250	Services	E(b) - Formerly A3	F&B	11	Gov. Employment Density Guide	A3
Mid Summer Place, SP4 7SQ	Pizza Hut	EPC	GIA	311	3,348	Services	E(b) - Formerly A3	F&B	16	Gov. Employment Density Guide	A3
Mid Summer Place, SP4 7SQ	Holiday Inn	EPC	GIA	3,694	39,762	Major	C1	Hotel and Restaurant	52	Gov. Employment Density Guide	C1 (General 3 Star)
Mid Summer Place, SP4 7SQ	Co-op	EPC	GIA	305	3,283	Services	E(a) - Formerly A1	Retail/Petrol Station	15	Gov. Employment Density Guide	A1 (High Street)
The Amesbury Archer, Mid Summer Place, SP4 7SQ	Harvester	EPC	GIA	647	6,964	Services	E(b) - Formerly A3	F&B	34	Gov. Employment Density Guide	A3
20 The Bluestone Centre, Sun Rise Way	Southern Quarter Coffee Shop	VOA	GIA	137	1,475	Services	E(g)(iii) - Formerly B1(c.)	Café	3	Gov. Employment Density Guide	B1c
2 The Sarsen Centre, SP4 7YR	Southern Quarter	EPC	GIA	1,189	12,798	Services	E(d) - Formerly D2	Gym	18	Gov. Employment Density Guide	D2
30 The Bluestone Centre, Sun Rise Way	Screwfix	VOA	GIA	492	5,293	Smaller	E(g)(iii) - Formerly B1(c.)	Builders Merchant	10	Gov. Employment Density Guide	B1c
31 The Bluestone Centre, Sun Rise Way											
32 The Bluestone Centre, Sun Rise Way											
33 The Bluestone Centre, Sun Rise Way	Howdens	VOA	GIA	863	9,291	Smaller	E(g)(iii) - Formerly B1(c.)	Builders Merchant	17	Gov. Employment Density Guide	B1c
26 The Bluestone Centre, Sun Rise Way											
27 The Bluestone Centre, Sun Rise Way											
28 The Bluestone Centre, Sun Rise Way											
35 The Bluestone Centre, Sun Rise Way											
36 The Bluestone Centre, Sun Rise Way											
37 The Bluestone Centre, Sun Rise Way											
Solstice Park Avenue, SP4 7RS	Home Bargains	VOA	GIA	2,752	29,619	Major	E(g)(i) - Formerly B1(a)	Retail Training Centre	0*	Planning application	N/A
TOTAL				11,822	127,257				241		

Solstice Park, Amesbury, Wiltshire

Photographs (February 2022)







