



MAY 2026

South Warwickshire Employment Land Study

Update 2026

Iceni Projects Limited on behalf of
Stratford-on Avon and Warwick
Councils
May 2026

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Study
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Contents

1. Executive Summary	1
2. Introduction.....	6
3. Policy Review	9
4. South Warwickshire’s Economy	41
5. Commercial Market Dynamics.....	63
6. Employment Land Needs Position	86
7. Current Employment Land Supply.....	107
8. Supply-Demand Balance.....	122
9. Advice on Potential Growth Locations	128
10. Monitoring.....	134

1. Executive Summary

1.0 This report provides an update to the previous South Warwickshire Employment Land Study 2024. The report draws on updated economic and commercial market dynamics, provides updated employment need figures for the 2021-50 period and compares this to the latest supply position as of April 2025. Recommendations reflect the updated supply-demand balance and draw on the Preferred Options Spatial Growth Strategy.

Non-Strategic Sites

1.1 The tables below show the supply-demand balance for non-strategic employment sites for the 2021-50 period, indicating a shortfall of 86ha in Warwick and 147.7ha in Stratford-on-Avon.

Table 1.1 Warwick Supply-Demand Balance (Ha) – Non-Strategic Sites

	Office	Industrial	Total
Need 2021-50	7.9	113.3	121.2
Supply	3.1	32.1	35.2
Residual Need 2021-50	4.8	81.2	86.0

Source: Icen analysis

Table 1.2 Stratford-on-Avon Supply-Demand Balance (Ha) – Non-Strategic Sites

	Office	Industrial	Total
Need 2021-50	3.7	196.2	199.9
Supply	1.4	50.8	52.2
Residual Need 2021-50	2.3	145.4	147.7

Source: Icen analysis

Strategic Sites

- 1.2 Regarding strategic sites, three opportunity areas identified within WMSESS 2024 fall within South Warwickshire.
- 1.3 The **Area 7 (Coventry / Rugby)** residual requirement is being met in full by commitments and emerging sites within Warwick and Rugby's emerging Local Plan. The evidence indicates the existing sub-regional site allocation (including Gateway South and Whitley South) should be retained to ensure the delivery of remaining phases. The allocation of Coventry Airport is recommended (subject to consideration of other parts of the evidence, including the Green Belt assessment and transport evidence), with policy supporting advanced manufacturing more broadly rather than limited use to battery production. Logistics uses should be limited and 'XL' units (+250,000 sq.ft) should only be permitted where ancillary to manufacturing or R&D activities. If these sites are taken forwards, no further allocations would therefore be needed in this Opportunity Area within South Warwickshire.
- 1.4 Within **Area 8 (M40 / A46)**, there is a residual requirement of 125ha to be met wholly within South Warwickshire through new employment allocations. The evidence herein indicates that the 100ha JLR allocation at Gaydon (which is already included within the supply) should be retained; but whilst retaining a focus on strategic manufacturing, the site might play a role in contributing to the supply for wider strategic employment land needs . Land within SG13 (Gaydon) could support further growth at the location.
- 1.5 Two potential strategic sites are identified within the Preferred Options Plan - Red House Farm (121ha) and Wedgnock Park Farm (141ha).
- 1.6 The proposed site area of Wedgnock Park Farm has been reduced to 71ha – if this site was progressed, an additional strategic site might be required. Alternatively Red House Farm would meet the residual strategic sites need alone, however there is risk in meeting the need at one site, which has significant infrastructure requirements.

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- 1.7 Area 9 (Redditch / Bromsgrove), borders Stratford-on-Avon, with the inclusion of M42 J3. The opportunity area has a residual requirement of 50-125ha. Given Bromsgrove and Redditch are within the early stages of plan-making, cross-boundary liaison is required to identify sites that will meet this residual requirement. The South Warwickshire Plan should look to test a potential contribution to meeting the need at M42 J3, the only junction within the opportunity area that falls within Stratford-on-Avon District, however it's not reasonable to plan on meeting the full requirement for Area 9 South Warwickshire.

Spatial Recommendations

- 1.8 The emerging spatial strategy focuses most new employment development within Major Investment Sites (MIS) and Strategic Growth Locations (SGLs).
- 1.9 Whilst Draft Policy Direction 14 indicates that the Long Marston Airfield employment allocation will be released, the position on Long Marston New Settlement has since changed. The New Settlement Masterplan for 10,000 homes is proposing to retain the existing employment allocation.
- 1.10 Employment provision within the potential Long Marston new settlement, should also consider employment space within the local centre, such as office and co-working space.
- 1.11 The Long Marston Rail Innovation Centre will continue to be safeguarded for rail-related employment and R&D, with opportunities for intensification to support employment generation alongside the nearby Meon Vale employment area.
- 1.12 At Stoneleigh Park, intensification is being explored through updated masterplanning. Improved connectivity to Kenilworth and the A46 is expected to support additional development, potentially delivering around 5ha of employment land. Further employment supply may also

come forward within the wider SG02 area, including Kingswood Business Park and Land East of the A46, providing up to 88.5ha of additional potential employment land.

- 1.13 At Abbey Park, previous office permissions have not been delivered due to viability constraints and worsening market conditions for speculative office development. A pending application for innovative business units could provide a modest contribution to the local industrial supply.
- 1.14 Within SG01 (South of Coventry / University of Warwick), the adopted masterplan supports R&D development linked to the University. Additional small-scale employment floorspace could be delivered within mixed-use schemes, particularly in areas with strong access to the A46.
- 1.15 The University of Warwick Wellesbourne Campus (SG15) represents a key opportunity to support the emerging agri-tech cluster, with two proposed employment sites providing around 49ha of potential employment land to accommodate spin-out and related businesses.
- 1.16 At Wellesbourne Airfield (SG16), employment development is proposed to support agri-tech expansion linked to the nearby campus, while also strengthening the area's general industrial offer due to its connectivity to the M40 via the A429. The Wellesbourne West site (62ha) would form part of the non-strategic employment supply.
- 1.17 Additional smaller-scale allocations are proposed at Southam, where around 5ha of additional employment land is recommended to support strong market demand and the town's growing digital and creative cluster.
- 1.18 At Henley-in-Arden, a mixed-use allocation including 3–5ha of employment land is recommended to address the current lack of provision and take advantage of sustainable rail access.
- 1.19 Outside of MIS and SGL locations, any additional employment allocations should be focused in locations with good strategic road

access and strong labour market connectivity, particularly near the main population centres of Warwick, Leamington Spa and Stratford-upon-Avon. The emerging policy framework also supports small-scale rural employment development and start-up businesses, provided proposals align with the spatial strategy and contribute to the rural economy.

2. Introduction

- 2.0 Warwick District Council and Stratford-on-Avon District Council have commissioned Icen Projects to prepare an updated Employment Land Study to support and inform the South Warwickshire Joint Local Plan.

Context and Purpose

- 2.1 This report builds on the findings of the Coventry & Warwickshire Housing and Economic Development Assessment (HEDNA)(2022), the West Midlands Strategic Sites Study (WMSESS) (2024) and the Coventry & Warwickshire HEDNA / WMSESS Alignment Report and Alignment Paper Addendum. These studies consider employment land needs; and this report seeks to draw together the evidence as it relates to South Warwickshire.
- 2.2 The report provides an updated review of market signals, an updated assessment of office floorspace needs and updates the supply position based on new monitoring data. It considers the supply-demand balance for employment in quantitative and qualitative terms as well as issues related to unmet employment land needs from Coventry.
- 2.3 These issues are brought together to consider the appropriate provision for office as well as industrial and logistics development to make in the South Warwickshire Local Plan. The report then considers spatial issues relating to the location of employment development and the inter-relationship between this and the proposed spatial strategy in the Plan.
- 2.4 The report is informed by selected additional engagement, including with the Coventry & Warwickshire Chamber of Commerce. It builds on findings from the South Warwickshire Affordable Business Space

Study, which IcenI has also prepared for the Councils. It updates the 2024 Employment Land Study report.

Report Structure

2.5 The report is structured to address:

- Policy and Evidence Review – including the Economic Development Strategy, Coventry & Warwickshire HEDNA, WMSESS studies, national planning policy;
- Economic Baseline – updating previous HEDNA analysis and using IDBR data to provide spatial analysis on key sub-sectors within the Study Area;
- Commercial Market Review – providing an updated picture of the commercial market in South Warwickshire using the CoStar database alongside agent engagement to explore the profile of the commercial deals and gaps in supply;
- Employment Land Needs – updated assessment office requirements and drawing together evidence on non-strategic industrial and strategic sites need;
- Employment Land Supply – calculating an updated employment land supply position including completions since the start of the Plan Period, existing commitments, extant allocations and vacant plots on existing sites identified throughout the site visits;
- Supply-Demand Balance - comparing to the identified need to the supply to provide an quantitative shortfall to be addressed through allocations;
- Advice on Potential Growth Locations – drawing on the Preferred Options Local Plan to make recommendations on how the employment land shortfall can be met in line with the emerging spatial strategy.

2.6 A separate Call for Sites Assessment Appendix has been updated to include additional sites, not considered within the 2023 study. The site assessments consider the suitability and market attractiveness of

candidate sites for employment development to meet the identified need.

3. Policy Review

- 3.0 This section reviews relevant policy documents from a national to local level as well as selected evidence studies at a regional level – in particular the West Midlands Strategic Employment Sites Study – which is an important input to consider employment land provision as part of the South Warwickshire Local Plan.

National Policy Planning Framework, December 2024

- 3.1 The National Planning Policy Framework sets out policies relevant to both plan-making and decision-taking. We set out below key policies relevant to planning for employment.
- 3.2 Para 8 addresses sustainable development and sets out that ‘Achieving sustainable development means that the planning system has three overarching objectives, which are interdependent and need to be pursued in mutually supportive ways (so that opportunities can be taken to secure net gains across each of the different objectives). This includes an economic objective – to help build a strong, responsive and competitive economy, by ensuring that sufficient land of the right types is available in the right places and at the right time to support growth, innovation and improved productivity; and by identifying and coordinating the provision of infrastructure;’
- 3.3 Para 85 states *‘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 both 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.' The Plan's employment evidence base (which includes this Study) seeks to consider the specific dynamics and growth potential of the South Warwickshire economy, and how the Plan's policies can support this.

3.4 Para 86 provides specific policies relevant to plan-making. It states

'Planning policies should:

- *set out a clear economic vision and strategy which positively and proactively encourages sustainable economic growth, having regard to the national industrial strategy and any relevant Local Industrial Strategies and other local policies for economic development and regeneration;*
- *set criteria and identify strategic sites, for local and inward investment to match the strategy and to meet anticipated needs over the plan period;*
- *pay particular regard to facilitating development to meet the needs of a modern economy, including by identifying suitable locations for uses such as laboratories, gigafactories, data centres, digital infrastructure, freight and logistics;*
- *seek to address potential barriers to investment, such as inadequate infrastructure, services or housing, or a poor environment; and*
- *be flexible enough to accommodate needs not anticipated in the plan and allow for new and flexible working practices and spaces to enable a rapid response to changes in economic circumstances.'*

3.5 Para 87 states *'Planning policies and decisions should recognise and address the specific locational requirements of different sectors. This includes making provision for:*

3.6 *a) clusters or networks of knowledge and data-driven, creative or high technology industries; and for new, expanded or upgraded facilities and infrastructure that are needed to support the growth of these industries (including data centres and grid connections);*

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- 3.7 *b) storage and distribution operations at a variety of scales and in suitably accessible locations that allow for the efficient and reliable handling of goods, especially where this is needed to support the supply chain, transport innovation and decarbonisation; and*
- 3.8 *c) the expansion or modernisation of other industries of local, regional or national importance to support economic growth and resilience.*
- 3.9 In a South Warwickshire context, key economic strengths (as explored later in this report) include advanced manufacturing, the gaming sector (which falls within the creative industries) as well as warehousing and logistics (which captures storage and distribution locations). For industrial and logistics uses, the need for modern floorspace is an important driver of development needs and is considered in the employment evidence.
- 3.10 Paragraphs 88 and 89 then addresses planning for rural economies. It states *'Planning policies and decisions should enable:*
- the sustainable growth and expansion of all types of business in rural areas, both through conversion of existing buildings and well-designed, beautiful new buildings;*
 - the development and diversification of agricultural and other land-based rural businesses...'*
- 3.11 Para 89 states *'Planning policies and decisions should recognise that sites to meet local business and community needs in rural areas may have to be found adjacent to or beyond existing settlements, and in locations that are not well served by public transport. In these circumstances it will be important to ensure that development is sensitive to its surroundings, does not have an unacceptable impact on local roads and exploits any opportunities to make a location more sustainable (for example by improving the scope for access on foot, by cycling or by public transport). The use of previously developed land, and sites that are physically well-related to existing settlements, should be encouraged where suitable opportunities exist.'*
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Consultation on Changes to the NPPF

- 3.12 The Government initiated a consultation on changes to the NPPF in December 2025. Whilst the NPPF has yet to be revised, the consultation has been considered to assess the potential direction of travel. A key proposed change is the disaggregation of plan-making and decision-making policies within the Framework.
- 3.13 Section 7 addresses building a strong, effective economy. It differs from the current NPPF, in making reference to Industrial Strategy Zones (previously Freeports and Investment Zones – including the West Midlands Investment Zone) and AI Growth Zones. It also proposes references to further forms of employment development – including campus facilities, last mile deliveries and leisure and tourism development.
- 3.14 The proposed national development management policies relating to economic development propose, in Draft Policy E1, that substantial weight is given to the economic benefits of commercial development which allow businesses to adapt, investment and expand, and specifically references development which supports freight and logistics within this. It also proposes that substantial weight should be given to the benefits of domestic food production, animal welfare or the environment from farm/ agricultural modernisation.
- 3.15 A specific national policy framework is also proposed where for development on unallocated land outside settlements, there is a need to demonstrate that an unmet need exists. Draft Policy E2 sets out relevant considerations in doing so, which include:
- Market signals – including an undersupply of specific types of land or premises, taking account of the anticipated catchment area for the type of development proposed, the changing needs of different sectors and the availability of existing land and buildings; or
 - Whether development proposals specific locational requirements are met within existing allocations in the development plan. It sets out

that this may be influenced by the availability of infrastructure (including power) or more efficient, reliable or sustainable logistics networks.

- 3.16 If taken forward, this emphasises the primacy of the local plan process in meeting development needs.
- 3.17 Draft Policy E3 sets out specific requirements regarding the location and design of freight and logistics development, expecting good access to transport networks; sufficient and secure lorry parking; and development which limits environmental impacts, as well as ensuring impacts on local residents and other neighbouring uses are minimised or mitigated.
- 3.18 An overarching focus of the proposed revisions to the NPPF is the introduction of National Development Management Policies; with the purpose of local plans being refocused on identifying development needs and then allocating land to meet these.
- 3.19 It should be recognised that these draft policies could be adjusted in their final form, taking account of the consultation. However there is some prospect that a revised NPPF will be published prior to the publication of the South Warwickshire Local Plan, which would potentially therefore need to accord with it (depending on the transitional arrangements set out).

Planning Practice Guidance

- 3.20 Planning Practice Guidance (PPG) sits alongside the NPPF. It provides specific guidance on '*Housing and Economic Development Needs Assessments*'. We have reviewed herein relevant elements of the PPG at the time of writing, but it should be recognised that the PPG is a live document and could be updated in due course to reflect changes to the NPPF.

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- 3.21 Relevant elements of the PPG as they relate to assessing development needs include:
- 3.22 *Para 29: 'The available stock of land can be compared with the particular requirements of the area so that 'gaps' and any over-supply in local employment land provision can be identified.*
- 3.23 *It is important to consider recent employment land take-up and projections (based on past trends) and forecasts (based on future scenarios), and to identify instances where sites have been developed or sought for specialist economic uses. This will help to provide an understanding of the underlying requirements for office, general business and distribution space, and (when compared with the overall stock of employment sites) can form the context for appraising individual sites.*
- 3.24 *Analysing supply and demand will allow policy makers to identify whether there is a mismatch between quantitative and qualitative supply of and demand for employment sites. This will enable an understanding of which market segments are over-supplied to be derived and those which are undersupplied.'*
- 3.25 *Para 31: 'Where a need for such [strategic logistics] facilities may exist, strategic policy-making authorities should collaborate with other authorities, infrastructure providers and other interests to identify the scale of need across the relevant market areas... Strategic policy-making authorities will then need to consider the most appropriate locations for meeting these identified needs (whether through the expansion of existing sites or development of new ones).*
- 3.26 *Authorities will also need to assess the extent to which land and policy support is required for other forms of logistics requirements, including the needs of SMEs and of 'last mile' facilities serving local markets. A range of up-to-date evidence may have to be considered in establishing the appropriate amount, type and location of provision, including market*

signals, anticipated changes in the local population and the housing stock as well as the local business base and infrastructure availability.'

3.27 Para 32: *'When assessing what land and policy support may be needed for different employment uses, it will be important to understand whether there are specific requirements in the local market which affect the types of land or premises needed. Clustering of certain industries (such as some high tech, engineering, digital, creative and logistics activities) can play an important role in supporting collaboration, innovation, productivity, and sustainability, as well as in driving the economic prospects of the areas in which they locate. Strategic policy-making authorities will need to develop a clear understanding of such needs and how they might be addressed taking account of relevant evidence and policy within Local Industrial Strategies. For example, this might include the need for greater studio capacity, co-working spaces or research facilities.*

3.28 *These needs are often more qualitative in nature and will have to be informed by engagement with businesses and occupiers within relevant sectors.'*

3.29 The PPG guidance for *'Housing and economic land availability assessment'* has informed the approach taken within this report to assess candidate employment sites.

3.30 Para 015 requires the assessment of: current land use; physical constraints; potential environmental constraints; consistency with development plan's policies; proximity to services and infrastructure; development progress where relevant and the suitability for a particular type of use.

3.31 Potential sites have been assessed for their suitability, availability and achievability (as required under Para 017), including the assessment of market attractiveness (Para 018) and a judgement on the economic viability of the sites for employment development (Para 020).

3.32 In addition, our approach within this report and the site assessment appendix also takes account of specific market drivers for the various types of commercial development, including locational attractiveness, strategic road network access and proximity to labour which will impact a site's suitability and achievability for employment use.

The UK's Modern Industrial Strategy (June 2025)

3.33 The UK's latest Industrial Strategy was published in June 2025. The Strategy focuses on eight growth-driving sectors (the IS-8) across services and manufacturing, based on both existing and emerging strengths:

- i. Advanced Manufacturing
- ii. Clean Energy Industries
- iii. Creative Industries
- iv. Defence
- v. Digital and Technologies
- vi. Financial Services
- vii. Life Sciences
- viii. Professional and Business Services

3.34 Key themes of the Strategy are as follows:

3.35 **Pro-business environment:** the Industrial Strategy will make it easier for companies to do business, giving them the stability to make long-term investments. Specific policy areas include people and skills, innovation, energy and infrastructure, the regulatory environment, and international partnerships and trade.

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- 3.36 **Place:** The Industrial Strategy places emphasis on enabling growth and investment within the city regions and clusters across the UK where the IS-8 sectors with high growth potential are based.
- 3.37 **Frontier Industries:** The Strategy proposes targeted actions to transform the highest-potential sectors (the IS-8) and the Frontier Industries within them through bespoke Sector Plans for the next 10-years.
- 3.38 **Partnership:** The Strategy emphasises the importance of the relationship between business and government, setting out an ambition to “create an enduring partnership” where the government better understands the needs of UK companies.
- 3.39 The UK Industrial Strategy’s emphasis on long-term investment, innovation and skills highlights the importance of delivering high-quality employment sites in South Warwickshire, to support the relevant growth-driving sectors, in particular advanced manufacturing and digital and technologies.

West Midlands Investment Zone

- 3.40 In 2023, the government launched a refocused Investment Zone (IZ) Programme which included 22 IZs, of which one is the West Midlands Investment Zone. The zone’s aim is to support growth in the advanced manufacturing sector, focusing on electric vehicle and battery technology; green industries; and health-tech. The Investment Zone is driven by three strategic sites – Birmingham Knowledge Quarter, Coventry and Warwick Investment Zone and Wolverhampton Green Innovation Corridor.
- 3.41 The Coventry & Warwickshire Investment Zone is located across Coventry and Warwick and is made up of four sites – Greenpower Park, SEGRO Park Coventry; SEGRO Park Whitley South and Whitley East. The sites benefit from tax relief, including 100% business rates relief

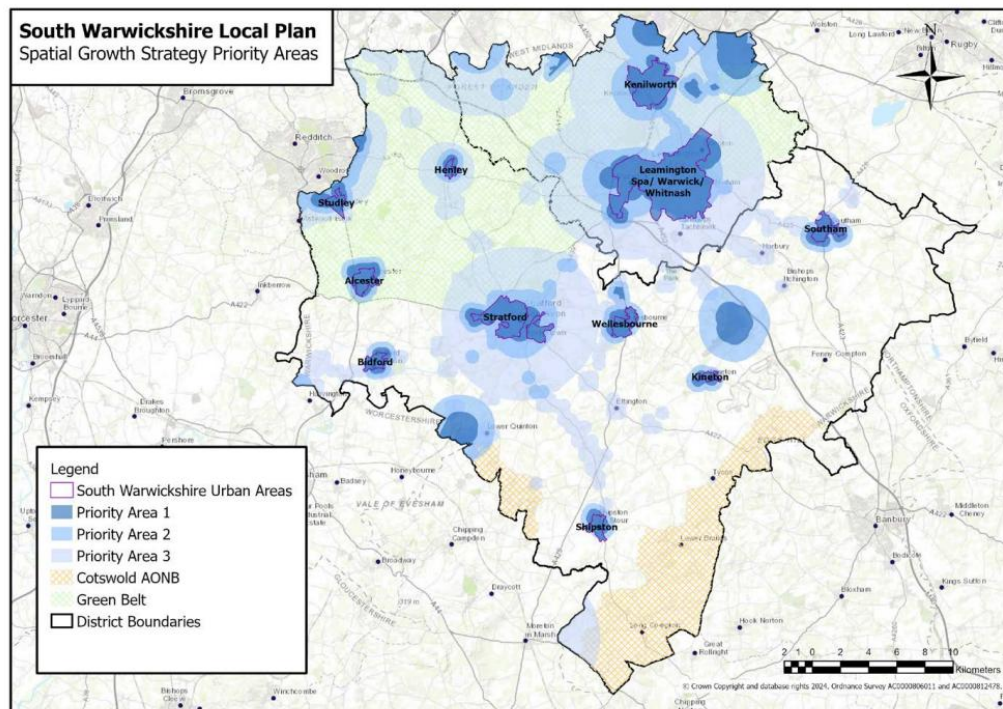
until March 2034; first-year capital allowances and National Insurance contributions relief¹.

South Warwickshire New Local Plan (Regulation 18)

- 3.42 On 19th January 2025, Stratford-on-Avon and Warwick District Councils launched the South Warwickshire Preferred Options (Regulation 18) consultation, which ran to 7th March 2025.
- 3.43 The Preferred Options Consultation document contained a number of draft policies and policy directions and sought views on the proposed Growth Strategy to 2050.
- 3.44 The strategy delineates three ‘priority areas’ which determines areas of land which fall within the spatial growth strategy, based on public transport accessibility, proximity to enterprise hubs and socio-economic factors.
- 3.45 South Warwickshire’s existing urban areas fall within Priority 1 and full use will be made of suitable urban brownfield land before development is considered elsewhere.
- 3.46 There is insufficient brownfield land to accommodate South Warwickshire’s housing and employment land needs and so a majority of the Local Plan’s strategic growth needs will be met within Priority Areas 1-3.
- 3.47 Strategic growth will be accommodated for outside of the Priority Areas only where it is of sufficient scale for infrastructure upgrades to be provided on site, such as a new settlement.

Figure 3.1 South Warwickshire Spatial Growth Strategy Priority Areas

¹ <https://www.wmca.org.uk/what-we-do/economy-and-innovation/west-midlands-investment-zone/coventry-warwick-investment-zone/>

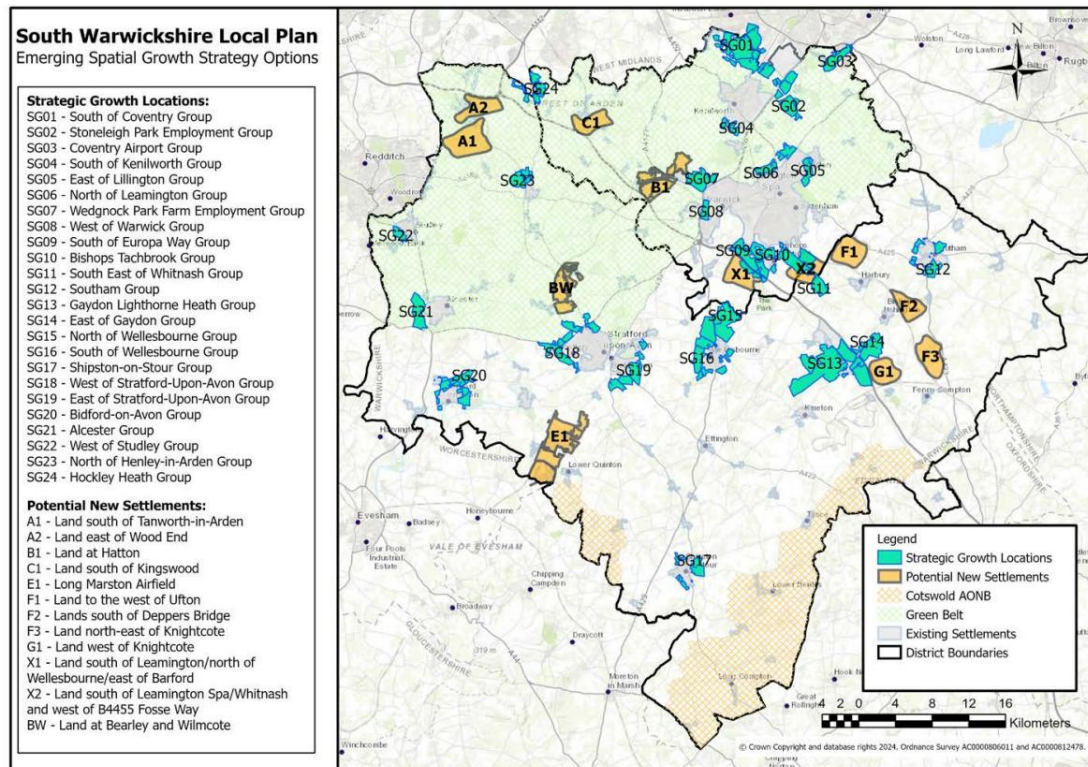


Source: South Warwickshire Local Plan Regulation 18

- 3.48 The figure below indicates emerging preferred spatial growth strategy option – previously Option 4: Sustainable Travel and Economy. focussed on urban land, sustainable travel, enterprise hubs and areas of deprivation that could be mitigated by new development.
- 3.49 Overall, 24 areas have been identified as locations for potential strategic growth. These locations could accommodate well in excess of South Warwickshire’s employment and housing needs and it is not expected that all areas will be allocated in the SWLP (Draft Policy Direction 1).
- 3.50 In broad terms, the Spatial Growth Strategy focuses a majority of potential growth at Warwick, Leamington, Wellesbourne, south of Coventry, Stratford-upon-Avon and Gaydon. Potential growth is also seen at Southam, Bidford-on-Avon, Alcester, Henley-in-Arden and Hockley Heath.
- 3.51 In addition, one or more new settlements will be identified and considered for strategic allocation (Draft Policy Direction 2). 12 potential

new settlement locations have been identified and their potential suitability assessed. New Settlements at Hatton, Long Marston Airfield, South of Leamington Spa and Bearley and Wilmcote were identified as 'more suitable'.

Figure 3.2 Emerging Spatial Growth Strategy



Source: South Warwickshire Local Plan Regulation 18

Draft Policy Direction 1 – Meeting South Warwickshire’s Sustainable Development

- 3.52 The policy direction sets out the residual employment need for the 2021-50 period, informed by the previous Employment Land Study 2024.
- 3.53 This update study provides an input to the evolution of the Plan’s strategy for employment provision, and provides an updated assessment of employment land needs together with advice on employment land provision within the Plan and how it aligns to the emerging spatial strategy.

Table 3.1 Residual Employment Land Requirements 2021-50

	Stratford-on-Avon District	Warwick District	South Warwickshire
Residual (net) non-strategic industrial need (2021-50)	-139	-78	-217
Residual (net) office need (2021 - 50)	-3	+14/-6.8	+11/-9.8
Residual (net) strategic industrial site need (2021-45) ²	-	-	-75 to -125

Source: South Warwickshire Local Plan Regulation 18T

Draft Policy Direction 12 - Locations for Employment Growth

3.54 South Warwickshire propose to plan for 125ha (upper limit) of strategic sites need. There are two potential strategic employment site locations that could meet the needs:

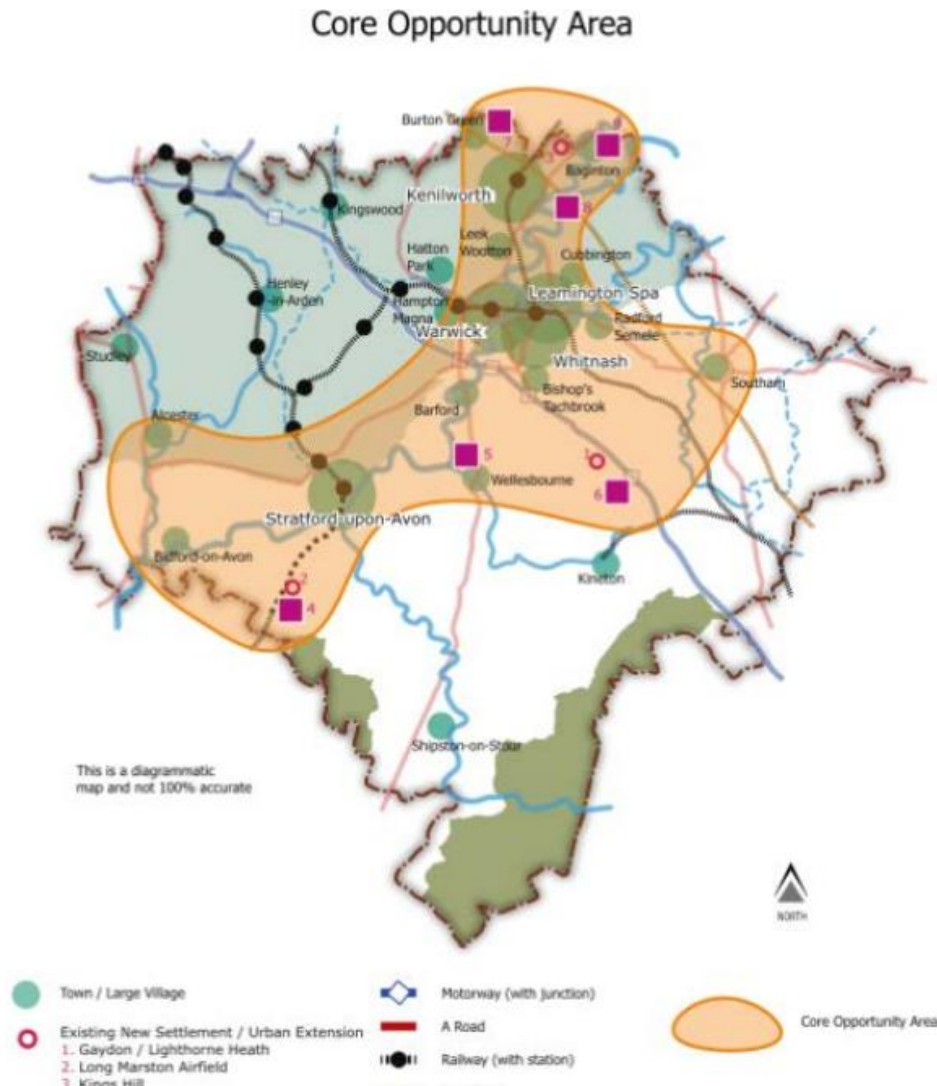
- Land at Red House Farm (121ha) – located to the south of Leamington offers the opportunity to fund and deliver a new junction to replace the two one-way junctions at J13 and J14 of M40. The site falls outside of the Green Belt and would relate well spatially to the existing urban areas and the M40.
- Wedgnoek Park Farm (141ha) – located to the west of Warwick within the Green Belt, accessing the M40 at J15.

3.55 The 100ha JLR allocation at Gaydon is proposed to be released to the wider market for strategic manufacturing uses and small-scale logistics units.

Draft Policy Direction 13 - Core Opportunity Area

3.56 The Core Opportunity Area will be the focus for new employment development in the South Warwickshire area, building on existing

employment hubs.



Draft Policy Direction 14 - Major Investment Sites (MIS)

3.57 The Major Employment Sites will be protected for employment uses and will be the main focus of new employment development in the Plan period.

- MIS.1 – Gaydon – JLR/AMR – release the existing 100ha for strategic B2 and small-scale B8. Further engagement with JLR regarding alternative sites and the potential retention of 4.5ha AML allocation;
- MIS. 2 – Long Marston Airfield – It is not proposed that existing allocation is rolled forward in its existing form. If further strategic growth is brought forward in addition to existing allocation this

should be accompanied by employment land provision and town centre uses including office;

- MIS. 3 – The Long Marston Rail Innovation Centre (Poterbrook) - safeguarded for rail-based R&D and intensification opportunities explored;
- MIS. 4 – South of Coventry Area – Coventry Airport allocated for a Gigafactory. Existing Sub Regional Employment Site allocation retained. Opportunity for further employment development to contribute to South Warwickshire’s or Coventry’s unmet need;
- MIS.5 and MIS.6 – Stoneleigh Park and Stoneleigh Deer Park/Abbey Park – further consideration of the intensification of Stoneleigh Park. Potential to improve connectivity with new access connecting to improved A46 Stoneleigh Junction. Abbey Park will be protected as existing/committed employment site.
- MIS.7 – University of Warwick main campus – adopted Masterplan SPD will bring forward development of further R&D premises. Further development of south of site will be explored.
- MIS8&9 – Wellesbourne including University of Warwick Wellesbourne Campus and Wellesbourne Airfield – proposed to expand agri-tech cluster at campus to support spin-out businesses and expansion of employment provision at Wellesbourne Airfield

Draft Policy Direction 15 - Provision of Office Accommodation and Refurbishment of Existing Office Stock

- 3.58 Sites will be allocated in Warwick and Leamington Spa town centres for office use (E(g)(i) in order to meet the office need in particular, to contribute towards the need for high quality office floorspace and the growth of the gaming cluster.
- 3.59 No allocations for office development will be made in Stratford-on-Avon District, as the Employment Land Study did not identify a need for further office allocations to meet the minimal identified need in this area.

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- 3.60 Development proposals that involve the refurbishment of existing office stock that is of poor quality or underutilised, in order to provide enhanced and upgrade office accommodation, will be supported.
- 3.61 The redevelopment and refurbishment of poor quality or underutilised out-of-town office spaces into smaller, flexible units to provide move-on space for businesses that have outgrown their premises will be supported, where this would provide a more effective use of the space.
- 3.62 Development that seeks to provide a substantial element of affordable office space will be supported.

Draft Policy Direction 16 - Airfields

- 3.63 The following Airfield sites are identified as potentially suitable for employment development as follows:
- Wellesbourne Airfield - It is proposed to safeguard the aviation function of the airfield however also proposed to partially repurpose site to include element of B2/B8 and ancillary E(g);
 - Atherstone – proposed to be released as an employment allocation, as it would not accord with Spatial Growth Strategy;
 - Coventry Airport – allocate site for Gigafactory.

Policy 18 – Supporting Rural Employment and Diversification

- 3.64 Development that contributes to a prosperous rural economy will be supported in principle, including the diversification of agricultural businesses and the expansion of existing rural businesses.
- 3.65 Outside of settlement boundaries, employment development will be acceptable in principle where it accords with Spatial Growth Strategy), is of an appropriate scale to its location, is easily accessible and respects the character of the surrounding area.

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- 3.66 Proposals for small and start-up businesses in rural areas will be supported in principle, where appropriate to their location. The SWLP will look at allocating sites for these purposes.
- 3.67 Agricultural diversification schemes will be encouraged providing they are of an appropriate scale to their location, respect the character of the surrounding landscape, re-use existing buildings where possible and any new buildings are well related to the built form and scale of the agricultural business.

Draft Policy Direction 19 - Supporting a Range of Business Units and Affordable Employment Space

- 3.68 Employment development that includes a range of unit sizes, including smaller units (9300 sqm/100,000 sqft) will be expected to provide an element of employment space for small and medium-sized enterprises, including move-on space, unless proven to be financially unviable or unsuitable for the specific site.
- 3.69 Proposals for large-scale employment development will be encouraged to include an element of affordable workspace for SMEs.
- 3.70 Development proposals for live-work units will be supported where appropriate to their location.

South Warwickshire Economic Strategy to 2028

- 3.71 The two Councils have recently prepared a new Economic Strategy for South Warwickshire, which was published in December 2023. The Strategy sets out that the Council's mission *"to foster the growth of the South Warwickshire economy sustainably and equitably. Working together, we will ensure economic participation and prosperity for everyone in South Warwickshire. We will also lead the way and take smarter steps towards a greener future to meet our ambitions for a 55% reduction in South Warwickshire's carbon emissions by 2030."*

Core Opportunity Sectors

3.72 Underlying the three themes of People, Productivity and Place are the core opportunity sectors of:

- Automotive and low carbon (including Automotive and Rail R&D, EV Batteries, Hydrogen);
- Low carbon 'green' technologies (including the Circular Economy);
- Bioscience, Medtech and Agri-tech;
- Digital Creative; and
- Visitor Economy – to include hospitality, retail, leisure, cultural heritage and the arts.

3.73 These underpin and relate to the Economic Vision set out. For each of these sectors, the Strategy describes the area's strengths and growth potential, which we have sought to summarise below:

- **Automotive and low carbon transport** - including advanced manufacturing engineering (AME), EV Batteries, Hydrogen and Rail . With strong links to both further and higher education institutions, South Warwickshire forms a world-leading cluster at the heart of advanced automotive technology and R & D into future mobility across all transport sectors. Specific market opportunities in this respect include:
- **EV Batteries** - taking a lead from the R&D foundation of the automotive industry, this fast-developing sector is creating a high value, advanced cluster in its own right, assisted by the UK Battery Innovation Centre in Warwick District and the proposed Investment Zone and Gigafactory at Coventry and Warwickshire Gateway South and the world-leading research of University of Warwick and Coventry University.
- **Hydrogen** – non-fossil fuel hydrogen generation is an alternative clean fuel to battery technology. Work on hydrogen technology in the rail industry is being explored at Long Marston with the development of the Hydro-flex train.
- **Low Carbon Technology** - to include the 'Green Economy' and the 'Circular Economy' – in addition to low carbon transport the area is well placed to develop opportunities across the 'Green Economy'. Warwick District is the home to National Grid's HQ and the area

offers opportunities for businesses in the development low-carbon forms of energy. The strategy seeks to encourage businesses working in this sector and will encourage the development of a **‘Circular Economy’** to move both councils towards the achievement of their Net-Zero ambitions.

- **Bioscience , Agri-tech and Medtech** - Seeking to develop biological and technological solutions that sustain, restore, and improve the quality of life for humans, plants, and animals in our world, including innovations in agriculture to increase its yield, efficiency, and profitability. Bioscience has strong roots in South Warwickshire with continual research since 1949. With access to R&D, higher educational institutes and pool of technical expertise opportunities to attract and develop hightech industries in the area.
- **Digital Creative** - Centred on Leamington Spa Town Centre this cluster extends to nearby towns such as Southam. The home of the UK video games industry, **“Silicon Spa”** employs 10% of the UK games development workforce and is the largest cluster outside of Greater London. The area offers the opportunity for development of Film and TV industry but also link up with other clusters involved in digital transformation, augmented and immersive technologies and digital manufacturing.
- **Visitor Economy** – to include hospitality, retail, leisure, cultural heritage and the arts – South Warwickshire boasts a host of global ‘hero brands’ in the likes of Shakespeare and the RSC, Warwick Castle and Kenilworth Castle and is well established as a tourist destination employing significant numbers of people and contributing to the local economy. A specific area of focus for the economic strategy will be to develop tourism in a sustainable way across the area and to look at new opportunities to build on the existing tourism offer of our local towns, villages and rural areas to ensure they remain vibrant and welcoming to both the resident and visitor alike.

Specific Economic Assets and Growth Opportunities

- 3.74 Related to these sectors, the Strategy sets out that South Warwickshire has specific assets and sites which underpin the growth opportunity in these areas, which we have sought to identify and summarise below:
- 3.75 **Automotive and Future Mobility** – the area is a world-class centre for advanced manufacturing and engineering. Aston Martin Lagonda, Jaguar Land Rover and Lotus Engineering all have a major presence in South Warwickshire particularly at Gaydon (where Aston Martin has its

global headquarters and JLR has its main R&D activities). In Stratford-on-Avon District, manufacturing (of which the automotive sector forms a significant part) is the largest sector accounting for over 40% of GVA.

3.76 UK Battery Industrialisation Centre (UKBIC) – Part of a Government programme to fast track the development of cost-effective, high-performance, durable, safe, low-weight and recyclable batteries, the UKBIC provides the missing link between prototype battery technology and successful mass production. UKBIC has been delivered through a consortium of Coventry City Council, CWLEP and Warwick Manufacturing Group/University of Warwick (WMG) as part of Green Power Park within Warwick District. The Energy Innovation Centre as part of WMG at the University of Warwick’s Science Park is undertaking ground breaking research and development into battery technology.

3.77 ‘Silicon Spa’ - The home of the UK’s Video Games Industry, the ‘Silicon Spa’ cluster (which extends from the heart of Royal Leamington Spa and stretches out to the surrounding areas of Southam and Warwick) employs over 2,000 highly skilled people, equating to over 10% of the UK total in games development.

3.78 West Midlands Investment Zone, West Midlands Gigafactory and Coventry & Warwickshire Gateway South - In its Autumn Statement 2023, the Government announced the go-ahead for the West Midlands Investment Zone which aims to bring more than £2billion of new investment to the regional economy. One of the three areas chosen for the investment is Coventry and Warwickshire. The proposed state of the art Gigafactory will be based on the Coventry Airport site in Warwick District at the heart of the UK’s automotive industry and will be able to supply UK manufacturers with batteries on their doorstep bringing investment, skills and jobs to the area and ensuring its place in the green revolution. The gigafactory proposals have outline planning consent.

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- 3.79 Wellesbourne Airfield** - Formerly RAF Wellesbourne Mountford, the airfield today operates as a general aviation airfield, home to private aircraft and a flying school training the next generation of UK commercial pilots. Its proximity to the University of Warwick's Campus at Wellesbourne provides, the Strategy outlines, an opportunity to attract inward investment as a centre for aviation innovation.
- 3.80 Stoneleigh Park** - A science and innovation park, home to a cluster of over 60 businesses related to food production, equine and livestock husbandry, sustainability, renewable energy and the wider rural economy, Stoneleigh Park is identified as a showcase for rural futures.
- 3.81 Kenilworth Gateway** – 8ha located on A46 Warwick Bypass as part of first phase of wider residential development (24ha). The site has planning permission for Class E/B2 use and excellent linkages to existing manufacturing, R&D and Digital Creative clusters.
- 3.82 Long Marston Rail Innovation Centre** – occupied by Porterbrook, the Long Marston Rail Innovation Centre is an increasingly important storage, training, research and development facility for the UK rail industry. Engineering excellence is central to the company's role as a leading railway asset owner and manager. In collaboration with industry partners, the business project manages the delivery of regular upgrades to its rolling stock fleets. Porterbrook's long-term investment plans for Long Marston would allow many UK rail businesses to accelerate work in areas such as research and development and innovation in addition to supporting the local economy in Warwickshire.
- 3.83 University of Warwick Wellesbourne Innovation Campus** - The University of Warwick's campus at Wellesbourne is a unique collaborative environment shared by academic research teams and a range of knowledge-led businesses. The vision for the site is for collaborative research to deliver on the global challenges of future mobility, crop science, digital technologies and health. There are currently over 20 businesses at the campus, including the Lotus

Advanced Technology Centre, Corteva Agrisciences, Rimac P3 Mobility, and the SMEs Lyra Electronics, Stoli Catalysts, Fluxsys and EBI Software, along with researchers from the University's School of Life Sciences and WMG (Warwick Manufacturing Group). The campus is also home to Defra's UK Vegetable Genebank, a repository of international significance, as well as the Natural Light Growing Centre, an industry-focussed R&D facility of one of the UK Government's Agri-tech Innovation Centres. The University has a long-term vision for growth at the campus, with plans to welcome further investment and build a world-leading innovation hub in the region.

Wider Challenges and Opportunities:

- 3.84** The Strategy identifies that the competitiveness of the South Warwickshire area has fluctuated; some parts of Warwickshire lack access to superfast broadband and phone coverage; there are areas with a lack of power/energy capacity to meet future development demand; and locations with limited public transport links. These are identified as key challenges to address in facilitating economic growth.
- 3.85 The Strategy sets out that research has shown that one of the barriers to economic growth across South Warwickshire has been the affordability of employment land, particularly local businesses looking to expand being priced out by competing land values or higher value sectors. It outlines that the councils are exploring how they can use their planning policies to promote and encourage the provision of affordable employment space across South Warwickshire and this strategy supports the principle of such provision. Further research is set out within the South Warwickshire Affordable Business Study prepared by Icen.

Objectives

- 3.86 Key strategic objectives set out in the Economic Strategy which are of specific relevance to this Employment Land Study are as follows:

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- **Objective 3:** To support existing sectors – which includes: to promote Warwickshire and Leamington Spa as the digital creative technology hub for the West Midlands and provide the necessary underpinning physical infrastructure; and
 - launch the Innovate UK Immersive and Creative Technologies launchpad funding programme.
 - **Objective 5:** To attract new sectors to South Warwickshire to diversify the local economy which includes: to work with University partners to maximise the benefit of “spin off” or “spin out” commercial opportunities arising from University research in low-carbon sectors; and to
 - support the provision of an electric vehicle “Gigafactory” and support low carbon future mobility and its associated value and supply chains within South Warwickshire
 - Develop the Wellesbourne Innovation Campus & sector supply chains. Develop the Kenilworth Gateway employment site

3.87 **Objective 8:** To ensure the adequate supply of employment land, including:

- To facilitate the provision of additional affordable employment premises across South Warwickshire through the SWLP;
- To ensure adequate future supply of employment land in the right locations across South Warwickshire through the SWLP; and
- To ensure the appropriate availability of physical infrastructure such as offices, enterprise and innovation centres and move on space in rural market towns in support of their neighbourhood plans.

Coventry & Warwickshire Housing & Economic Development Needs Assessment, November 2022

3.88 This assessment, the ‘Sub-Regional HEDNA’, was prepared to provide a consistent evidence base regarding housing and economic development needs across the Coventry & Warwickshire sub-region to inform plan-making.

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- 3.89 The tables below summarises the local employment land needs recommendation for the plan period 2021-41 and 2021-50 respectively. The Study identified an office need of 5.2ha in Stratford and 11.4ha in Warwick; and an industrial need of 166.1ha in Stratford and 56.2ha in Warwick up to 2041. The industrial need includes E(g)(iii) light industrial, B2 industrial and B8 units of less than 9,000 sq.m.
- 3.90 The office land need is derived from a labour demand model, based on 2021 forecasts from Cambridge Econometrics, given that office requirements tend to be more closely linked to employment levels. In reality there was some expectation that future office demand will focus on higher quality provision that is more likely to manifest in stronger markets – notably Coventry and Warwick/Leamington – in particular having regard to rents and viability considerations.
- 3.91 Findings on industrial and warehousing need within the HEDNA were derived from a gross completions trend as neither the VOA industrial stock trend or labour demand models considered were able to differentiate the strategic and more local industrial/warehouse requirements, and as replacement demand is a notable driver of future floorspace and development needs. The market evidence and consultation and engagement undertaken indicated that whilst B8 demand was very strong at the time of the HEDNA's preparation, and that there is a case for considering separate allocations for B1c/B2 where land is delineated from sites for B8 in order to ensure a supply of land for the manufacturing sector and the delivery of space for manufacturing uses, given the importance of this sector at a local and sub-regional level. It identified a strong manufacturing sector in the sub-region and the importance of ensuring sufficient employment land provision to support its growth.
- 3.92 The needs findings include a margin, equivalent to 5 years gross completions for industrial and 3 years of offices, to provide a choice of sites and provide flexibility. However no office margin was included for Stratford and Warwick due to data issues.

Table 3.2 Employment Land Needs 2021-41, Ha

	Office	General Industrial	Sub-Total	Strategic B8
N. Warwickshire	5.3	56.1	61.4	
N. and Bedworth	2.2	45.5	47.7	
Rugby	5.2	150.5	155.7	
Stratford-on-Avon	5.2	166.1	171.3	
Warwick	11.4	56.2	67.6	
Coventry	8.5	147.6	156.1	
Total	37.7	621.9	659.6	551

Source: VOA / CE/lceni

Table 3.3 Employment Land Needs 2021-50, Ha

	Office	General Industrial	Sub-Total	Strategic B8
N. Warwickshire	7.0	81.4	88.4	
N. and Bedworth	3.0	66.0	69.0	
Rugby	6.5	218.2	224.7	
Stratford-on-Avon	7.2	240.9	248.1	
Warwick	15.8	81.4	97.2	
Coventry	10.0	214.0	224.0	
Total	49.4	901.8	951.3	735

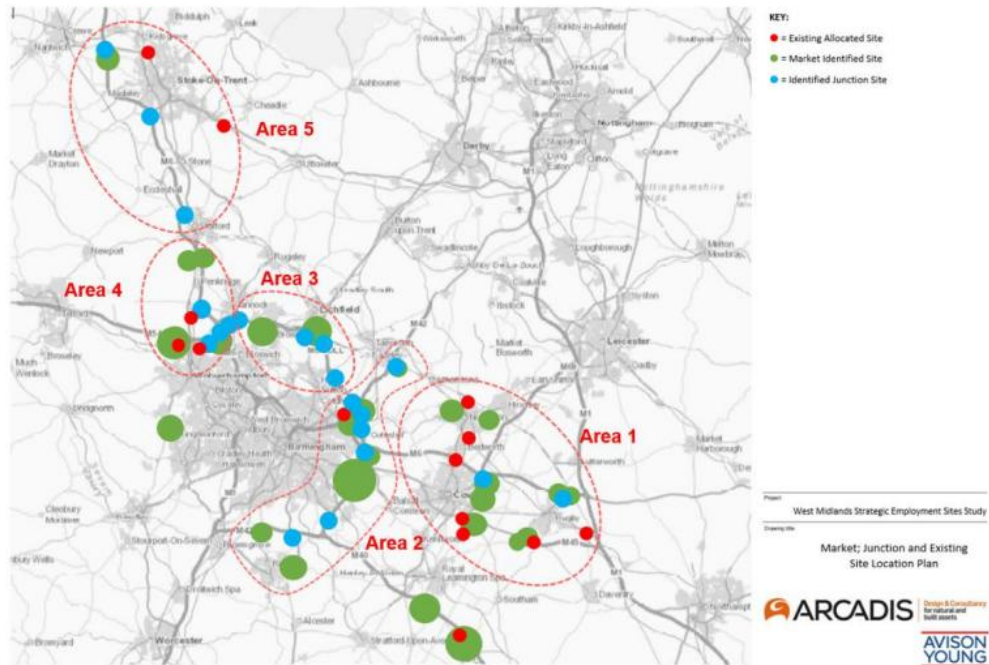
Source: VOA / CE/lceni

- 3.93 In addition to the above, a gross need for 551-735ha land for strategic B8 development (B8 units of over 9,000 sq.m) was identified across Coventry and Warwickshire.
- 3.94 **This need figures in the HEDNA for general industrial and strategic B8 development has now been superseded by the evidence within the West Midlands Strategic Sites Study, which considers needs for strategic sites for both manufacturing and big box logistics, and the Alignment Report for Coventry & Warwickshire report which provides an aligned set of findings for strategic and non-strategic land for industrial and logistics (I&L) development. These studies are considered further below.**

West Midlands Strategic Employment Sites Study, May 2021

- 3.95 This Study was commissioned to provide an update to the previous 2015 Strategic Employment Sites Study, providing commentary on take-up rates in the industrial and office markets and an audit of existing allocated and committed sites in the Study Area which meet the definition of Strategic Employment Land.
- 3.96 There was general agreement that the availability and choice of existing and new space under construction was at a very low level and there needs to be a collective political will to address the limited supply of Strategic Sites going forward.
- 3.97 The Study identified five broad locations where new additional strategic employment sites should be concentrated, based on analysis of the quantum of supply, market intelligence and areas achieving highest land prices. Area 1, as shown on the map below, was identified as one of the strongest markets for strategic employment land, and includes the northern part of Warwick District.

Figure 2.1: Key Geographies for Strategic Employment Sites in 2021 West Midlands Strategic Employment Sites Study Report



- 3.98 An audit of adopted and emerging evidence bases identified 664 employment sites which met the 25+ha size criteria used, but concluded that just 12 sites (including existing allocations and sites with planning consent) had a capacity for further employment development of 25+ha plus the West Midlands Interchange. The 13 sites have a capacity of 2.96 million sq.m and based on take-up trends over the 2015-18 period, this represents a maximum of 7.41 years of supply.
- 3.99 Stakeholders submitted land interests resulting in identification of a further 31 potential candidate sites, of which 905ha was within Area 1.

West Midlands Strategic Sites Study, August 2024

- 3.100 This Study, prepared by Icen and Mace, essentially develops and supersedes the previous 2021 study and goes further in scope. The Study was intended to inform local plan making and looks forwards to 2045, identifying and specifically quantifying a need for strategic sites;

updates the position on committed sites; provides recommendations on the overall number and type of sites required (road and rail-based) and advise on the phasing and broad locations (or 'Opportunity Areas') for new strategic sites to inform Local Plan preparation. The Study covers the core area of the West Midlands.²

Strategic Sites

The WMSESS defines strategic sites as sites which are typically over 25 ha or above (or extensions to existing strategic sites of > 10 ha), can accommodate strategic sized industrial and logistics units of > 9,300 sq.m in size, and benefit from strong accessibility to the Strategic Road Network. This would typically be sites which are within a 5 minute drivetime of SRN junctions.

- 3.101 Overall the Study identifies a net need for 615-977ha of land to be identified through further strategic sites, of which 67-135ha is rail-based and 548-841ha is road-based. This is in addition to existing commitments through current allocations and extant planning permissions.

² It excludes Herefordshire, most of Worcestershire and parts of Shropshire

Table 3.4 Strategic Site Needs – West Midlands, 2022-45

	MDST	Completions
Forecasted Need 2022-45 with adjustments and margin	3,354*	3,080
Strategic sites adjustment (-25%**)	2,516	2,310
Brownfield recycling adjustment***	2,282	1,920
Adjusted Road Need****	1,848	1,555
Adjusted Rail Need****	433	365
Commitments ³	1,305	
Road Shortfall	841	548
Rail Shortfall	135	67
Shortfall (Ha)	977	615

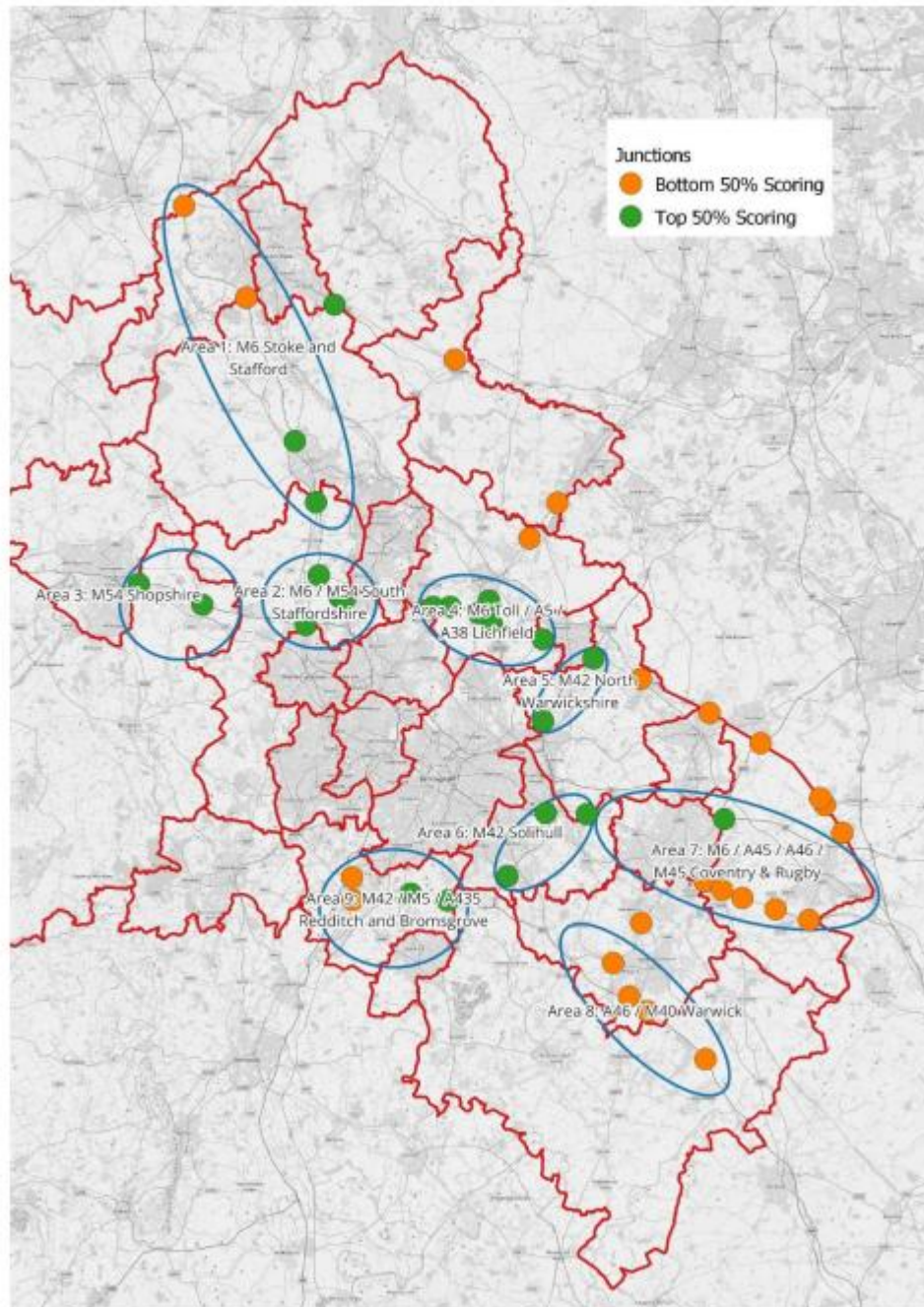
Source: Icen Projects

*includes -20% recycling adjustment

**downwards adjustment of 35% for strategic units not on strategic sites and upwards 10% adjustment to allow for small units on strategic sites.


- 3.102 High level testing of potential land availability and constraints, accessibility, junction capacity and potential access to labour allowed for the identification of 9 opportunity areas across the Study area, as pictured below.
- 3.103 'Area 8: A46/M40 Warwick' is the primary opportunity area wholly within South Warwickshire. 'Area 7: M6 / A45 / A46 / M45 Coventry & Rugby' overlaps the north of Warwick District (and includes existing commitments such as the Sub-Regional Employment Site identified in the adopted Warwick District Local Plan and Coventry Airport) however junction opportunities and further potential land do not fall within Warwick District. Area 9 overlaps the western edge of Stratford-on-Avon, with a majority of identified junctions within Redditch and Bromsgrove.

Figure 3.3 WMSESS Opportunity Areas



3.104 A high-level exercise was undertaken to balance commitments against past take-up rates, market attributes and other considerations for the opportunity areas identified. The phasing and apportionment for Area 8 is summarised in the table below. It indicates a need for 1-2 B8/Mixed strategic employment sites in the short term, reflecting the limited current supply, and 1 more dedicated B2 strategic site, taking account of the existing JLR/AML commitment.

Table 3.5 Area 8 Strategic Site Recommendations and Phasing

Opportunity Area	Notional supply – years ( =current committed supply)				Market rank	Indicative phasing	Indicative additional strategic site requirement at B8/mixed c.50ha - B1/B2 dedicated c.25ha	Narrative – market rank / performance, scale (no. LPA), site supply, SRFIs, Green Belt	
	Type	0-5	5-10	10-15					15-20
Area 8: A46 / M40 Warwick	B8/ Mixed					B	A	1-2	Large OA. Existing supply is in Warwick but at Coventry, identified in Rugby/Coventry OA.
	B1/B2						C/ D	1	Existing JLR/AML supply concentrated for single occupier. Potential for further manufacturing agglomeration.

Coventry & Warwickshire Alignment Paper 2024 and Addendum 2025

- 3.124 Following the publication of the WMSESS 2024, a paper was commissioned by the Coventry & Warwickshire authorities to consider the relationship between the WMSESS and the 2022 Coventry & Warwickshire HEDNA.
- 3.125 **The alignment studies seek to align the evidence between the two studies by segmenting the overall industrial and logistics (I&L) need between strategic and non-strategic sites and to reconcile different plan periods.** In doing so it considers the need for smaller industrial units (< 9,300 sq.m) as what provision should be made for development of larger units on non-strategic sites to derive conclusions

on 'local industrial need' as well as calculating the need for strategic sites for the Coventry and Warwickshire area.

3.126 The paper then used monitoring data up to 2023/24 to provide an updated supply-demand balance for local industrial space, in addition to updating the residual strategic sites requirement in light of the latest commitments. **The findings of this study and its implications for Warwick and Stratford-on-Avon are explained and summarised in Section 5 of this report.**

3.127 In November 2025, an addendum to the Alignment Paper was published, addressing representations made in the Rugby Borough Council Regulation 18 consultation. This included an adjustment to the quantum of supply that Coventry Gateway contributed to the Area 7 requirement based on the developable area and the erroneous inclusion of the country park within the supply. We do not consider that the Addendum has a direct impact on the strategic site requirements for I&L uses in South Warwickshire.

4. South Warwickshire's Economy

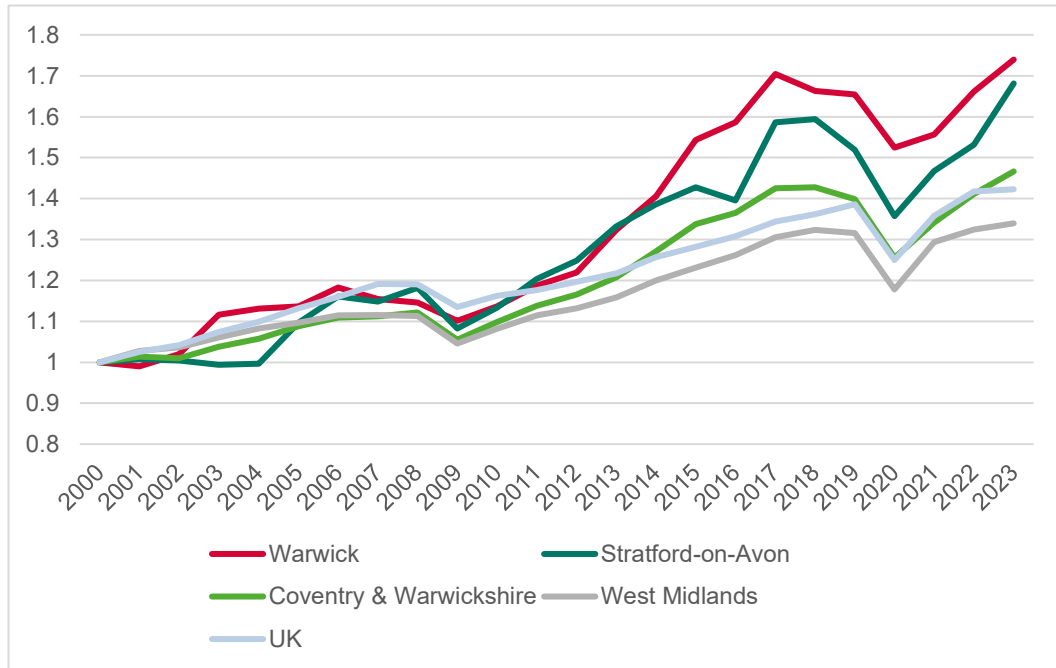
- 4.0 The 2022 Sub-Regional HEDNA provides key evidence regarding economics dynamics and the need for employment land to inform the South Warwickshire Local Plan. This Study does not therefore seek to repeat the economic analysis undertaken therein, but seeks to build on this – including through developing a more detailed understanding of key growth sectors in South Warwickshire.
- 4.1 This section provides a focused update to the economic baseline analysis presented within the 2022 HEDNA, capturing the most up-to-date published data available. IDBR data has also been used to drill into key sectors identified within the South Warwickshire Economic Strategy.

Economic Context

- 4.2 The figure below shows indexed GVA growth for Warwick and Stratford-on-Avon compared to Coventry & Warwickshire, the region and the UK. Warwick and Stratford-on-Avon districts have seen higher GVA growth since 2000 with a growth of 74% and 68% respectively, compared to 47% across Coventry & Warwickshire, 34% in the West Midlands and 42% in the UK. Both areas saw GVA fall in 2020, driven by the disruptive effect of Covid-19, but have recovered strongly with GVA exceeding the pre-Covid peak in 2023.
- 4.3 Warwick contributes 22% to the total C&W GVA and has accounted for 29% of sub-regional GVA growth 2013-23; Stratford-on-Avon

contributes 18% to the total C&W GVA and has accounted for 21% of 10-year GVA growth³.

Figure 4.1 Historical GVA Growth



Source: IcenI analysis of Experian data (2025)

- 4.4 In terms of sectoral composition, GVA growth over the 2003-23 period in Warwick has been driven by utilities, professional services, manufacturing and finance & insurance. The district has seen a contraction of economic output in the transport and storage sector.
- 4.5 In Stratford-on-Avon, GVA growth since 2003 has been driven by manufacturing, professional services, finance & Insurance, public services and Information and communication. The district has seen a contraction in accommodation and food, construction and transport and storage.

³ Experian 2025

Table 4.1 GVA Growth by Sector

	Warwick		Stratford-on-Avon	
	GVA Change 2003-23 £ million	% CAGR	GVA Change 2003-23 £ million	% CAGR
Accommodation, Food Services & Recreation	3.3	0.1%	-25.7	-0.4%
Agriculture, Forestry & Fishing	3.8	0.9%	5	0.3%
Construction	77.0	1.7%	-17.7	-0.3%
Extraction & Mining	-0.3	-100%	-0.5	-6.1%
Finance & Insurance	202.8	3.9%	146.9	6.7%
Information & communication	87.4	1.1%	47.7	2.0%
Manufacturing	285.5	3.6%	1,726	8.5%
Professional & Other Private Services	554.5	1.6%	239.5	0.8%
Public Services	179.6	1.0%	112.4	1.2%
Transport & storage	-7.3	-0.2%	-8.1	-0.6%
Utilities	1,106	5.9%	29.8	4.6%
Wholesale & Retail	-246.9	-1.5%	32.3	0.4%
Total	2,245	1.8%	2,287	2.5%

Source: IcenI analysis of Experian 2025

4.81 The table below shows the change in employment over the past 10 years. Warwick has seen the greatest employment growth in public services (+4,000 jobs); professional services (+3,400 jobs) and information and communication (+3,000 jobs), the latter linked in particular to gaming sector growth. Growth in public services will be influenced in part by residential growth.

4.82 In Stratford-on-Avon, employment growth has been concentrated in professional services (5,600 jobs), manufacturing (+3,700 jobs) and

accommodation and food (+3,000 jobs). The latter reflects the strength of its tourism offer.

Table 4.2 Employment Growth by Sector

	Warwick		Stratford-on-Avon	
	2013-23 Change	% Change	2013-23 Change	% Change
Accommodation, Food Services & Recreation	2800	26%	3000	34%
Agriculture, Forestry & Fishing	-300	-50%	-900	-26%
Construction	-300	5%	-200	-4%
Finance & Insurance	-200	-21%	800	32%
Information & communication	3300	53%	1300	57%
Manufacturing	-100	5%	3700	49%
Professional & Other Private Services	3400	14%	5600	34%
Public Services	4000	15%	1200	10%
Transport & storage	1300	38%	100	6%
Utilities	3000	111%	100	50%
Wholesale & Retail	400	1%	-200	-2%
Total	17,300		14,500	

Source: IcenI analysis of Experian 2025

- 4.83 The table below shows the business base by size of business in Warwick and Stratford-on-Avon and compares this to the regional and national proportions. Warwick has a slightly higher prevalence of small, medium and large businesses than the comparator areas and subsequently a lower proportion of micro businesses, implying that business survival and scale-up rates are more successful in the district. Stratford-on-Avon has a relatively smaller proportion of medium and large businesses and a higher concentration of micro-businesses.
- 4.84 In terms of business density, which measures the number of businesses per 1,000 working age (16-64) population, both Warwick and Stratford-on-Avon see higher rates than the region and England.

Table 4.3 Business Size and Business Density

	Micro (0-9)	Small (10 -49)	Medium- sized (50 -249)	Large (250+)	Total	Business Density
Warwick	6,220	725	140	45	7,130	103
	87.2%	10.2%	2.0%	0.6%		
Stratford- on- Avon	7,330	675	110	20	8,135	75
	90.1%	8.3%	1.4%	0.2%		
West Midlands	88.9%	9.1%	1.6%	0.5%		59
England	89.2%	8.7%	1.6%	0.5%		67

Source: ONS Business Counts 2025

- 4.85 Further details of business dynamics are set out in the Affordable Business Space Study.
- 4.86 The table below provides a summary of key labour market indicators for Warwick and Stratford-on-Avon and compares them to the regional and national average rates.
- 4.87 The employment rate in both districts is much higher than the region and England. Subsequently, both districts see a lower unemployment rate and claimant count than its comparators.
- 4.88 Both districts have a higher level of educational attainment with around 67% of the working age population, in both districts, having an NVQ4+ level of qualification. Warwick sees a higher proportion (66%) of its working age population in the top 3 occupational groups (highest skilled employment) compared to 50-54% in the West Midlands and England. Stratford-on-Avon is more in line with the national level at 53.5%.
- 4.89 In Warwick workplace-based earnings are much lower than resident-based earnings, indicating that there is a level of out-commuting to higher paid jobs. Consequently workers from outside of the district commute into Warwick for lower-paid employment.

4.90 In Stratford-on-Avon, the opposite is the case, with workplace-based earnings exceeding resident earnings, implying a level of in-commuting for higher paid employment, with a proportion likely from Warwick.

Table 4.4 Labour Market Indicators 2024/25

	Warwick	Stratford-on-Avon	West Midlands	England
Employment Rate (Oct 24-Sept 25) ⁴	83.0%	82.6%	74.3%	75.8%
Unemployment (Oct 24 – Sept 25) ⁵	3.4%	3.0%	5.4%	4.3%
Claimant Count	2.3%	2.2%	5.2%	4.0%
% 16-64 qualified to NVQ4+ (2024) ⁴	66.8%	66.9%	42.9%	46.8%
% employment in top 3 occupational groups (2024) ⁴	66.1%	53.5%	49.7%	53.9%
Median Weekly Workplace-based Earnings (2025)	£761.10	£956.80	£730.40	£770.70
Median Weekly Resident-based Earnings (2025)	£934.30	£817.60	£731.00	£769.50

Source: ONS 2025

⁴ Annual population survey

⁵ Model-based estimates of employment October 2024-September 2025

Sub-Sector Analysis

4.131 The following section looks at South Warwickshire's key sub-sectors, as identified in the area's Economic Strategy, in further detail. These are:

- Digital Creative
- Logistics
- Automotive and Low Carbon Transport
- Agri-tech
- General Manufacturing

4.132 The sub-sectors have been defined by 5 digit SIC 2007 codes in **Appendix 1** and uses IDBR data to provide analysis on the size and spatial distribution of sub-sectors. It should be noted that maps produced are postcode-based and businesses under the same postcode will be shown under the same marker.

Digital & Creative

4.133 The Digital & Creative sector includes the development and publishing of computer games and other software.

4.134 Across South Warwickshire there are 228 businesses registered under this SIC code definition, supporting 3,700 jobs (rounded). A majority of businesses are micro with 0 to 4 employees, making up 65% of the creative digital sector. There are just two larger businesses with over 250 employees supporting 29% of sector employment.

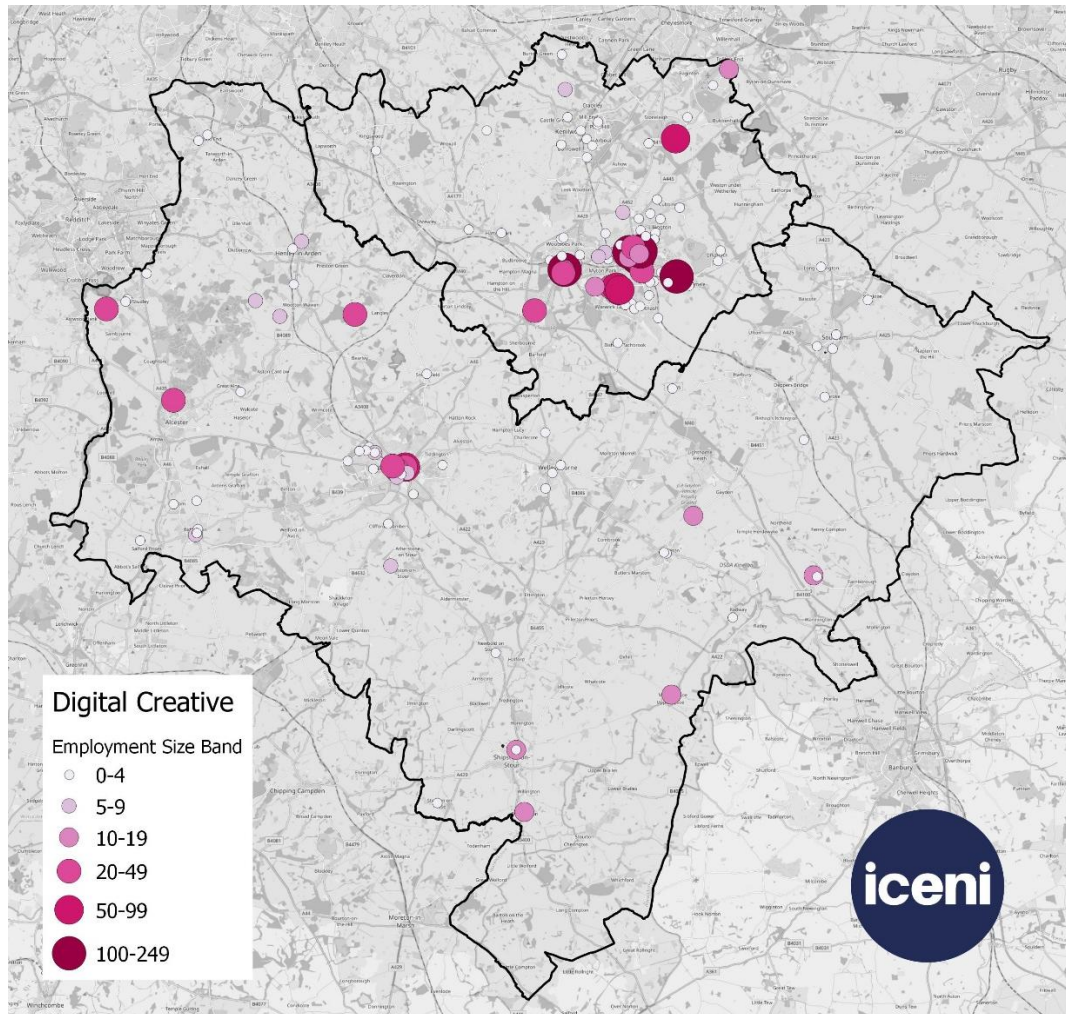
Table 4.5 Creative Digital Businesses and Employment by Size

Business Employment Size Band	Total Employment	% employment	Number of Businesses	% businesses
0-4	248	6.8%	148	64.9%
5-9	205	5.6%	31	13.6%
10-19	249	6.8%	16	7.0%
20-49	492	13.5%	17	7.5%
50-99	641	17.6%	9	3.9%
100-249	755	20.7%	5	2.2%
250+	1,056	29.0%	2	0.9%
Grand Total	3646		228	

Source: IDBR (2024)

- 4.135 The map below shows the spatial distribution of digital creative companies. There is a significant cluster in Leamington Spa and Warwick (explored in more detail below). There is a smaller cluster of business activity in Stratford-on-Avon Town Centre, however these business tend to have a general software focus rather than specific to gaming. Kenilworth and Southam have a cluster of micro digital creative businesses.

Figure 4.2 Digital Creative Companies by Employee Size Band



Source: IDBR (2024)

- 4.136 The map below shows a close up of digital creative businesses in Leamington Spa and Warwick. A majority of businesses, in particular smaller companies, are located within Leamington Spa Town Centre.
- 4.137 Engagement with stakeholders revealed there is an emerging concentration of businesses in Tachbrook Park (south of Leamington Town Centre) which has recently seen the arrival of a few gaming companies, in particular larger companies that are looking to scale-up and expand their premises and are unable to find suitable premises in the Town Centre itself. For example, stakeholders identified that Sumo Group are located here on a temporary basis, awaiting the

refurbishment of their premises at the old House of Fraser on Bedford Street.

- 4.138 There is also an emerging cluster within Warwick, with 27 companies located in Warwick Town Centre. Stakeholder feedback revealed that companies have moved here due to a lack of suitable office premises within Leamington Spa. Stakeholders revealed that Maverick Games, a 'triple A' Start-up are located at Saltisford.
- 4.139 There are 10 companies located at Warwick Technology Park, a majority of these have less than 4 employees and are located within the Innovation Centre which provides short-lease start-up space for start-ups and small businesses with units from 250-2,000 sq.ft.
- 4.140 In addition to this, the Codemasters Studio (now owned by EA Games), which has developed into a world-renowned games publisher, are based in Southam.

Figure 4.3 Creative Digital Businesses – Warwick and Leamington Cluster



Source: IDBR (2024)

The provision and retention of affordable business space in key urban centres in South Warwickshire, including at town centre and business park locations, will be important to supporting the growth and success of the 'gaming cluster' in South Warwickshire.

Professional Services

- 4.141 The professional services sector includes financial services, insurance, IT services, project management, marketing consulting, creative services and architecture.
- 4.142 There are 2,200 professional services businesses in South Warwickshire, supporting 17,300 jobs (rounded). A large majority of businesses have less than 4 employees, supporting 16% of employment; but employment is balanced across different business sizes. There are 9 businesses with over 250 employees, supporting nearly a third of sector employment. 55% of professional services employment is in businesses of over 50 staff.

Table 4.6 Professional Services Businesses and Employment – South Warwickshire

Size Band	Employment	% employment	Number of Businesses	% businesses
0-4	2,711	15.7%	1748	79.7%
5-9	1,332	7.7%	205	9.4%
10-19	1,658	9.6%	119	5.4%
20-49	2,115	12.2%	68	3.1%
50-99	1,955	11.3%	28	1.3%
100-249	2,154	12.5%	15	0.7%
250+	5,363	31.0%	9	0.4%
Total	17,288		2192	

Source: IDBR (2024)

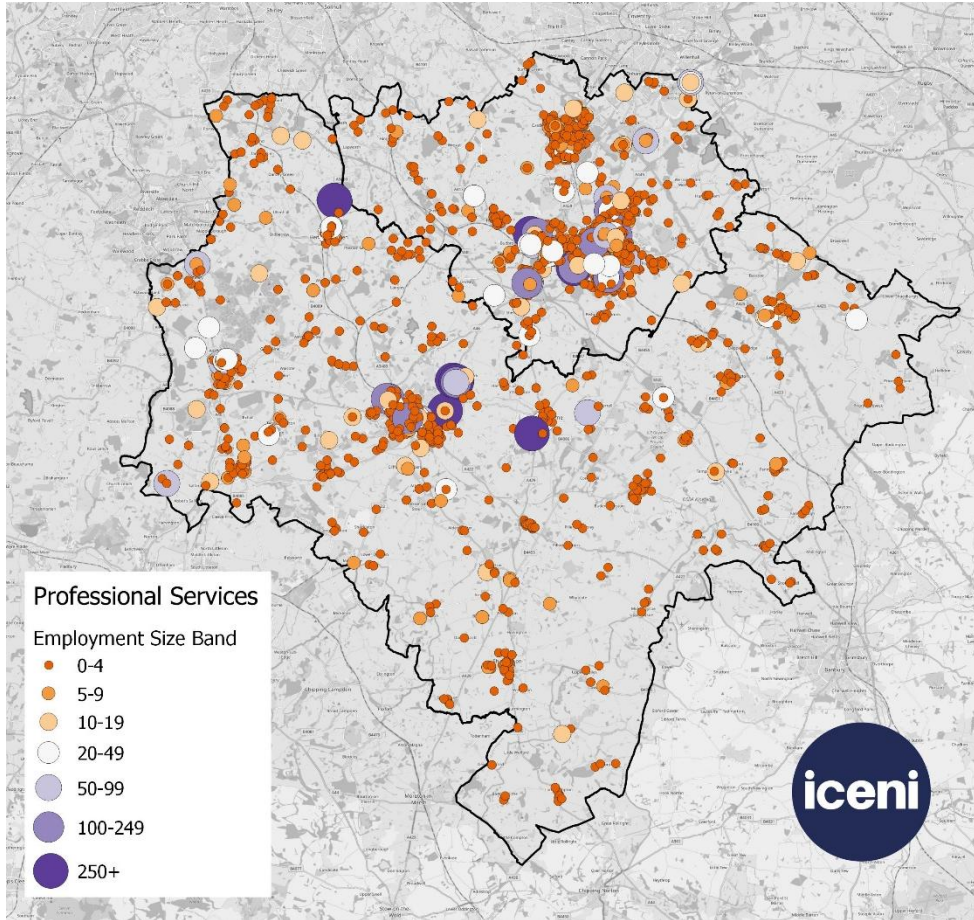
- 4.143 The map below shows the spatial distribution of professional services businesses. There is an even distribution of micro businesses across

the whole of South Warwickshire. Medium and large enterprises are concentrated in Leamington Spa, Warwick and Stratford. Taking a closer look, businesses are located in particular in:

- Leamington Spa Town Centre;
- Warwick Technology Park;
- Tachbrook Park;
- Warwick Town Centre;
- Stratford town centre;
- Timothy's Bridge Road in Stratford-upon-Avon;
- Ryon Hill Park in Stratford-upon-Avon.

4.144 Kenilworth has a significant clustering of professional services businesses however these are generally micro-businesses. There is also a sector presence on Stoneleigh Park and Abbey Park.

Figure 4.4 Professional Services Companies by Employment Size Band



Source: IDBR (2024)

- 4.145 There is a relatively strong spatial relationship between the locations of professional services firms and the settlement geography / hierarchy.

Transport, Storage and Logistics

- 4.146 There are around 300 logistics businesses in South Warwickshire, supporting 5,800 jobs (rounded). A significant proportion of sector employment is concentrated in larger businesses with over 100 employees. There are 8 businesses with 100-249 employees and 4 with over 250 employees.

Table 4.7 Logistics Business and Employment – South Warwickshire

Size Band	Employment	% employment	Number of Businesses	% businesses
0-4	314	5.4%	184	61.5%
5-9	317	5.5%	49	16.4%

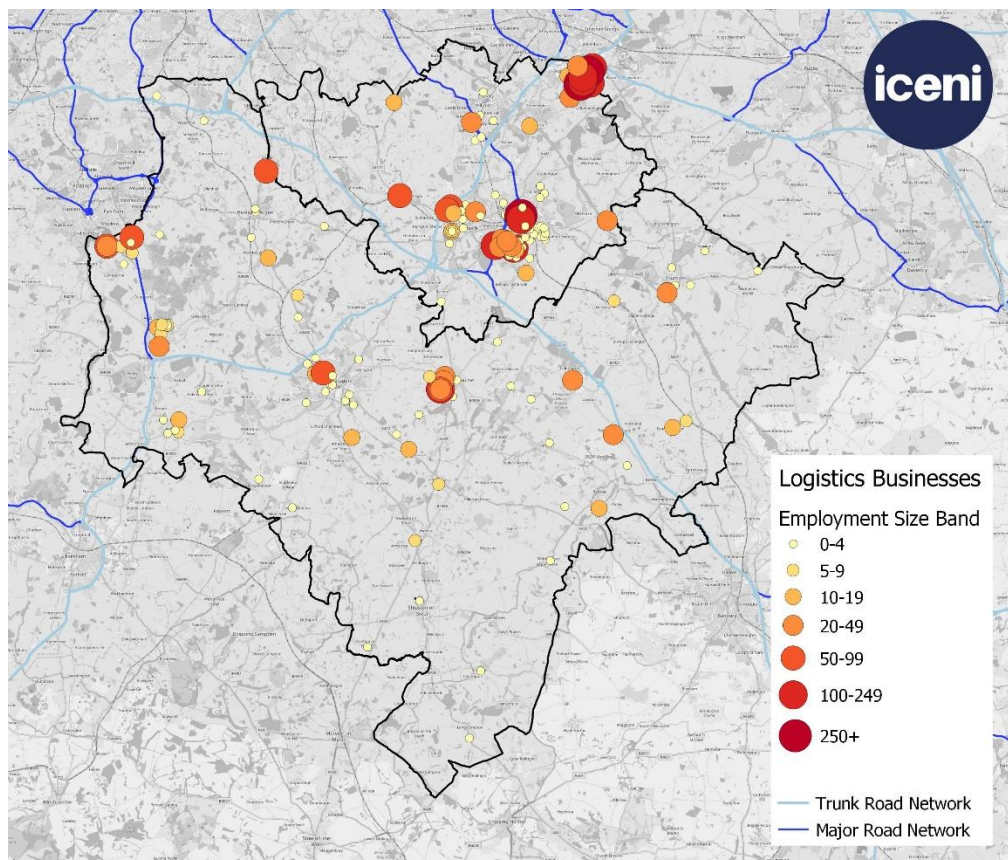
10-19	301	5.2%	21	7.0%
20-49	777	13.5%	23	7.7%
50-99	768	13.3%	10	3.3%
100-249	1174	20.3%	8	2.7%
250+	2122	36.8%	4	1.3%
Total	5773		299	

Source: IDBR (2024)

- 4.147 With the exception of the area around Coventry Airport, South Warwickshire is not viewed as a key location for strategic distribution within the wider West Midlands due to more appealing areas elsewhere. It predominantly falls outside of the logistics ‘Golden Triangle’ which is the key location for larger National Distribution Centres (NDCs). Logistics activity has therefore historically focussed more around smaller/ medium-sized units, and local and regional supply chains (including manufacturing) rather than national distribution. There is however an aspiration amongst developers for new strategic logistics sites along the M40; and there has been recent new development on this corridor- in particular around Banbury.
- 4.148 The skills profile within the logistics sector is changing, and with increasing automation the skill levels and average earnings have been rising. Stakeholders have expressed some concern that the presence of a new logistics site in a less densely populated area of the District could cause displacement from other low-skilled sectors such as the visitor economy, hospitality and health and social care due to the higher wages offered by logistics companies. Therefore it is important that logistics sites are well connected to urban areas and key areas of residential growth via public transport.
- 4.149 The map below shows the spatial distribution of logistics businesses across South Warwickshire. There is a cluster of larger logistics located in the north of Warwick District at Middlemarch Business Park, benefiting from access to the strategic road network (A45 and A46) and the proximity to Coventry. This area is currently undergoing expansion with the delivery of Coventry Gateway.

- 4.150 There is also a cluster of logistics occupiers in Leamington Spa, in particular at Spa Park and Heathcote Industrial Estate. Whilst there are some larger businesses, there is a significant presence smaller businesses (<10 employees).
- 4.151 Warwick has some mid-sized businesses at Wedgnock Industrial Estate to the west of the town, benefiting from direct access to the A46. Further south there are 6 logistics businesses located at Wellesbourne (M40 Distribution Park).
- 4.152 Logistics business located in Stratford-on-Avon historically tend to be micro and small enterprises. Studley has 11 logistics businesses of various sizes. These companies likely serve Redditch due to the proximity.

Figure 4.5 Logistics Businesses by Size Band



Source: IDBR (2024)

Automotive and Low Carbon Transport

- 4.153 There are around 60 businesses within the Automotive and Low Carbon Transport sub-sector, supporting 11,500 jobs (rounded). The sector thus supports significant employment within the sub-region. A significant majority of 90% of employment is supported by just 4 businesses with over 250 employees.
- 4.154 Engagement with stakeholders revealed that employment within this sector in South Warwickshire is particularly R&D focussed, with JLR having two research and development sites at Gaydon and Fen End - JLR have approximately 9,000 engineers. Aston Martin Lagonda headquarters are also located at Gaydon (which includes both R&D and manufacturing) and General Motors have recently fitted out their Advanced Design Studio located at Spa Park in Leamington Spa.
- 4.155 The attractiveness of the area for R&D is influenced by proximity to research infrastructure, including Warwick University' main and Wellesbourne Campuses, the UK Battery Industrialisation Centre (UK BIC) (located at Coventry Airport), Coventry University and the Manufacturing Technology Centre (MTC) at Ansty Park, which falls within Rugby District.

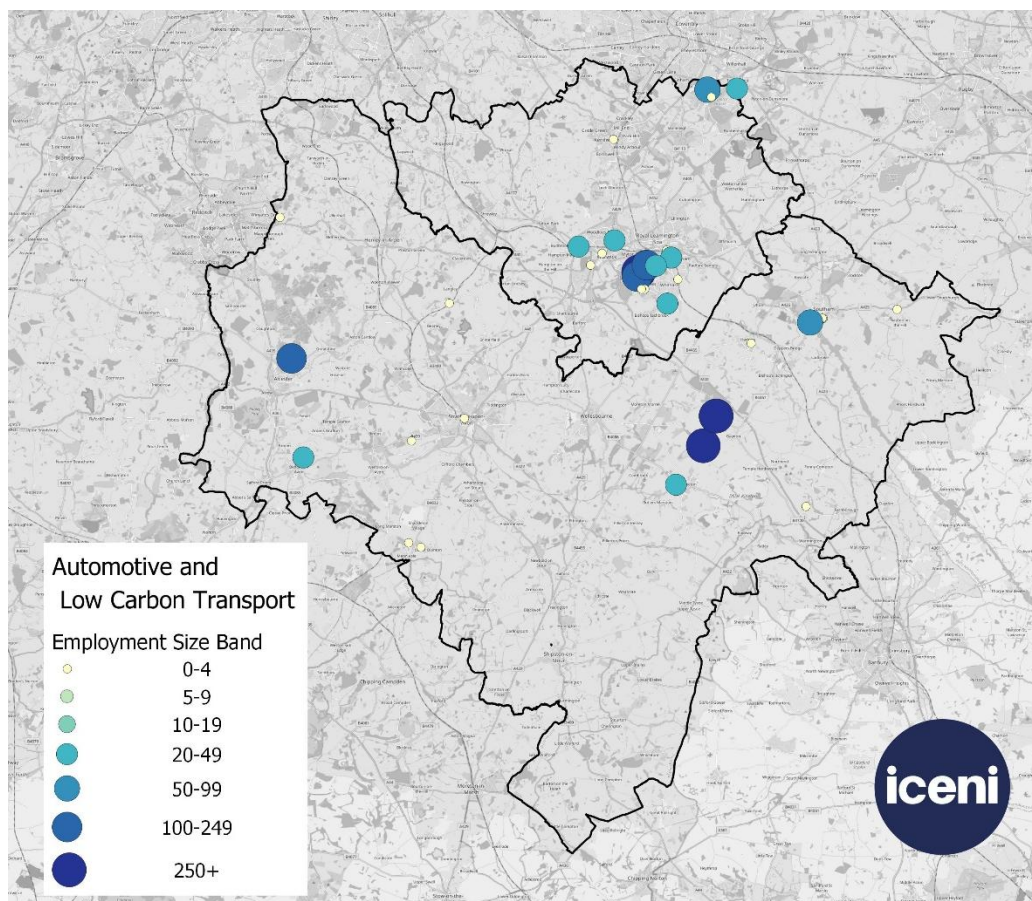
Table 4.8 Automotive and Low Carbon Transport Businesses and Employment by Size Band – South Warwickshire

Size Band	Employment	% employment	Number of Businesses	% businesses
0-4	45	0.4%	24	40.7%
5-9	45	0.4%	8	13.6%
10-19	95	0.8%	7	11.9%
20-49	286	2.4%	10	16.9%
50-99	156	1.3%	2	3.4%
100-249	533	4.6%	4	6.8%
250+	10,523	90.1%	4	6.8%
Total	11,523		59	

Source: IDBR

- 4.156 The map below shows the spatial distribution of automotive and low carbon businesses, with two large occupiers at Gaydon (JLR and AML). There is cluster of medium to large businesses (50+ employees) in Leamington Spa at Heathcote Industrial Estate (which includes Dennis Eagle's HQ) and Tachbrook Park.
- 4.157 Outside of the boundary, there is significant automotive activity along the M40, extending south of the Stratford-on-Avon boundary to Banbury (including Pro-Drive); as well as in Coventry and other parts of Warwickshire.

Figure 4.6 Automotive and Low Carbon Transport Businesses by Size Band



Source: IDBR (2024)

- 4.158 There is a good pipeline of automotive projects and occupiers directed to Warwickshire through Invest in Coventry & Warwickshire, however

there is currently a lack of space to support these enquiries. In some cases, premises that were available needed significant investment and refurbishment to suit the occupier.

4.159 There is 100ha (JLR) and 4.5ha (AML) of land allocated for automotive uses at Gaydon for expansion of these businesses, however this has not been built out to date due to business circumstances and commercial considerations. This is considered further in the site assessments. Aston Martin set up a factory at an alternative site in St Athan in Wales and Jaguar Land Rover have focussed their expansion at other sites in Halewood and Solihull.

Agri-tech

4.160 There are around 90 'agri-tech' businesses within South Warwickshire supporting 1,600 jobs (rounded). A majority of businesses have less than 5 employees. There are 3 companies with over 100 employees, supporting 60% of sub-sector employment. The sub-sector is driven by rural businesses such as food production, farming, food processing, food logistics rather than high-technology companies.

Table 4.9 Agri-tech Businesses and Employment by Size Band – South Warwickshire

Size Band	Employment	% employment	Number of Businesses	% businesses
0-4	109	6.8%	60	65.9%
5-9	90	5.6%	14	15.4%
10-19	81	5.0%	6	6.6%
20-49	160	9.9%	5	5.5%
50-99	202	12.5%	3	3.3%
100-249	303	18.8%	2	2.2%
250+	665	41.3%	1	1.1%
Total	1610		91	

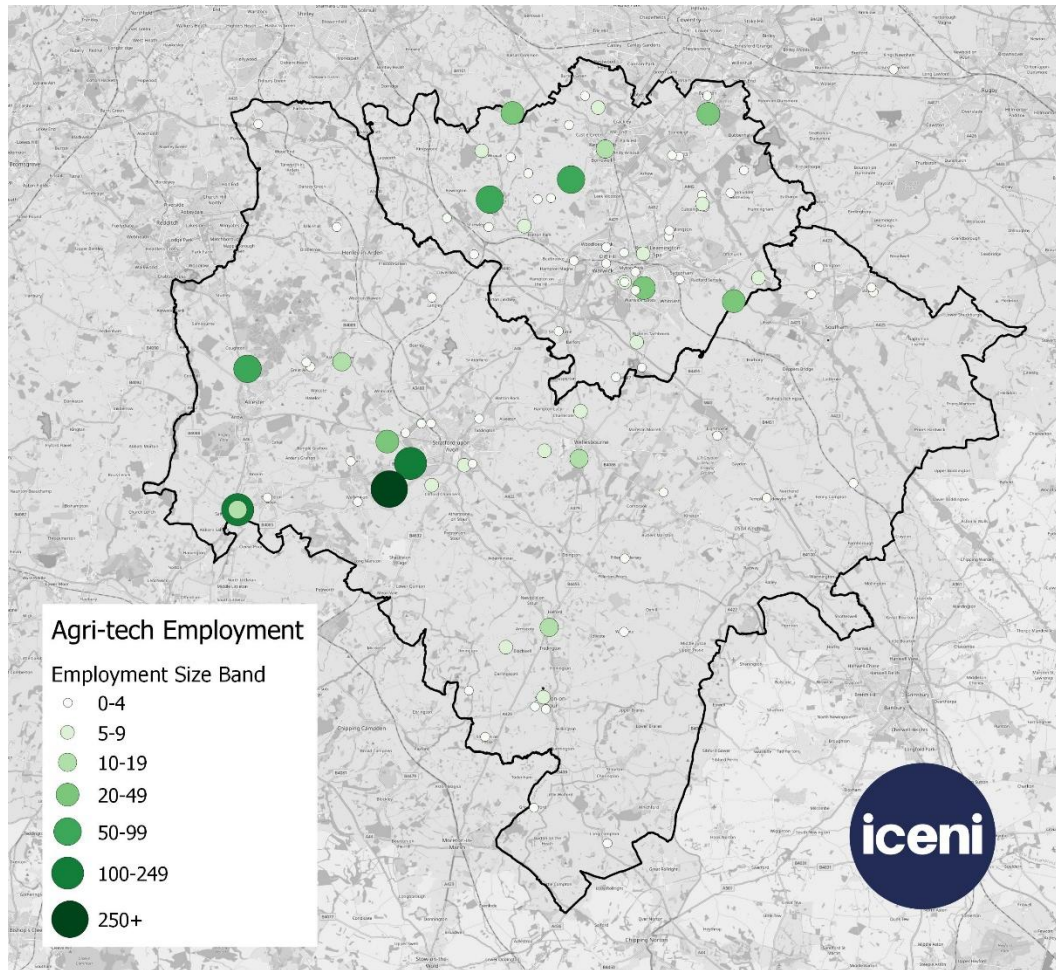
Source: IDBR 2024

4.161 The map below shows the spatial distribution of agri-tech businesses. Companies within the sector are dispersed across both Districts in

particularly the rural areas, as might be expected, with no clear clustering.

- 4.162 There is one business – likely Sandfields Farms - with over 250+ employees, supporting 665 jobs, based in Luddington, identified as ‘support activities for crop production’.
- 4.163 Stoneleigh Park sees a cluster of agricultural businesses including the National Farmers Union (NFU) Headquarters, Agriculture and Horticulture Development Board, British Beekeepers Association, Dexter Cattle Society and Linking Environment and Farming, however these do not all fall into the ‘agri-tech’ definition but are relevant to the wider growth potential in this sector in South Warwickshire, with the NFU headquarters being on the original anchors for the Rural Innovation Park.
- 4.164 The Rural Innovation Centre is also within Stoneleigh Park is, providing 46 serviced offices. The site currently has five office properties available, totalling over 2,500 sq.m of floorspace.
- 4.165 The site has an outstanding masterplan which was not built out and is due a refresh, however progress has been halted by HS2 development on the boundary of the site. Feedback indicated that there was inward investment interest for the site however this was not currently pursued for these reasons. The site has the potential to become an important agricultural and agri-tech hub with the provision of the correct space. For further details see the Stoneleigh Park site specific analysis.
- 4.166 The University of Warwick Wellesbourne Campus is a 200ha agricultural research-focused facility.
- 4.167 The University has set up Warwick Agri-Tech, bringing together expertise in manufacturing from WMG with the School of Life Sciences to spearhead innovation in areas such as horticulture, crops and forestry. There is thus a strong R&D base in the area.

Figure 4.7 Agri-tech Businesses by Size Band



Source: IDBR (2024)

- 4.168 Overall there are both a range of businesses, including larger businesses in this sector, and key research and sector institutions which underpin the sector's strength in South Warwickshire.

General Manufacturing

- 4.169 There are around 630 manufacturing businesses within South Warwickshire, supporting 11,000 jobs (rounded). Over half of manufacturing businesses have less than 5 employees. There is also a significant number of businesses with 5-20 employees, typically requiring small to mid size industrial units. 15 businesses have over 100 employees, supporting around half of the sector's jobs.

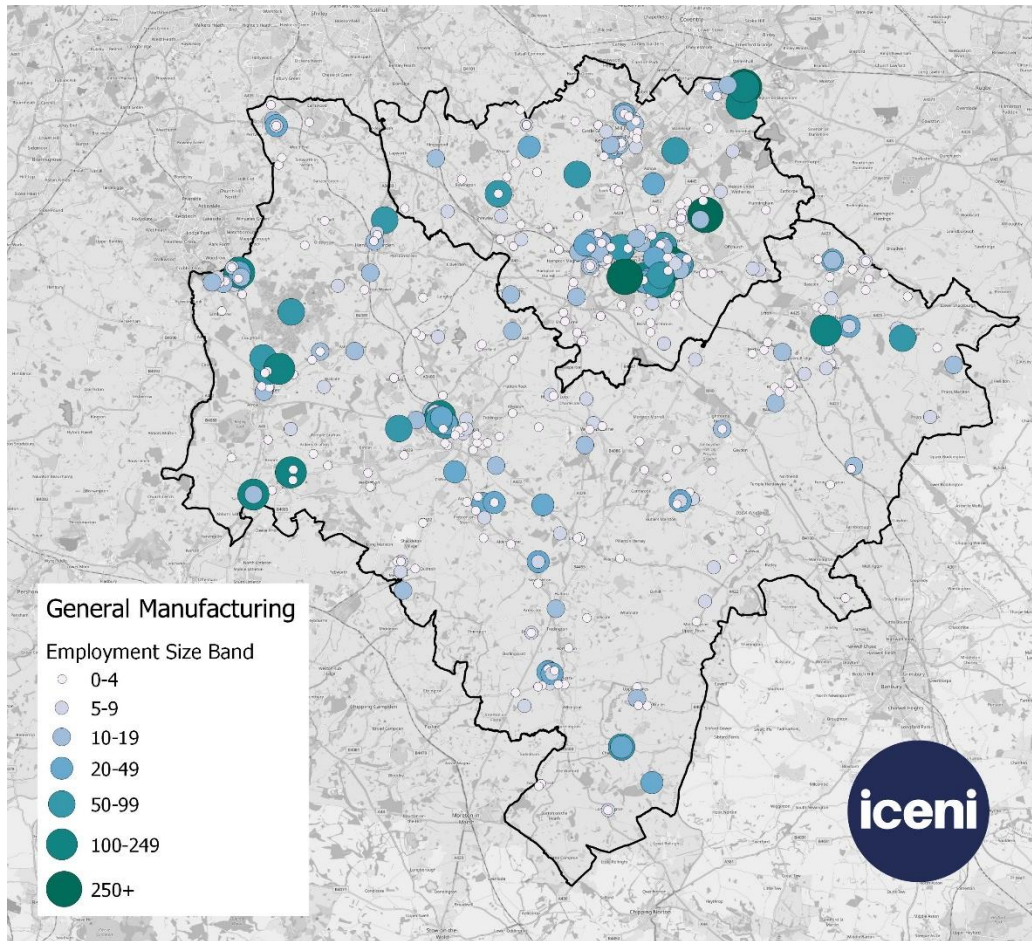
Table 4.10 General Manufacturing Business and Employment by Size Band – South Warwickshire

Size Band	Employment	% employment	Number of Businesses	% businesses
0-4	674	6.1%	359	56.6%
5-9	702	6.4%	106	16.7%
10-19	1,072	9.7%	79	12.5%
20-49	1,590	14.4%	53	8.4%
50-99	1,404	12.8%	22	3.5%
100-249	1,608	14.6%	10	1.6%
250+	3,955	35.9%	5	0.8%
Total	11,005		634	

Source: IDBR

- 4.170 The map below shows the spatial distribution of manufacturing businesses across South Warwickshire. There is a strong spread of businesses including a strong presence of industrial businesses in the smaller towns and rural areas.
- 4.171 Leamington Spa has a significant cluster of manufacturing businesses within Heathcote Industrial Estate and Spa Park. There is significant presence in Warwick’s industrial areas (Millers Road, Budbrooke Road and Harris Road). Stratford-on-Avon’s manufacturing businesses are concentrated on Timothy’s Bridge Road.
- 4.172 There are also some large occupiers located at Middlemarch Business Park near Coventry Airport which sits close to JLR’s world HQ and OEMs in the Coventry area more broadly. The UKBIC is also located here, as identified. Other clusters of typically smaller businesses can be seen in Studley, Alcester, Shipton-on-Stour, Kenilworth and Southam.

Figure 4.8 General Manufacturing Businesses by Size Band



Source: IDBR (2024)

4.173 The spatial understanding of these key sectors has been used to inform consideration of site-specific attractiveness of sites for different forms of employment in other aspects of this report.

5. Commercial Market Dynamics

5.0 This section provides an updated view of the office and industrial and logistics market for Warwick and Stratford-on-Avon individually using the latest CoStar data up to the end of 2025, addressing key market signals.

Office Market

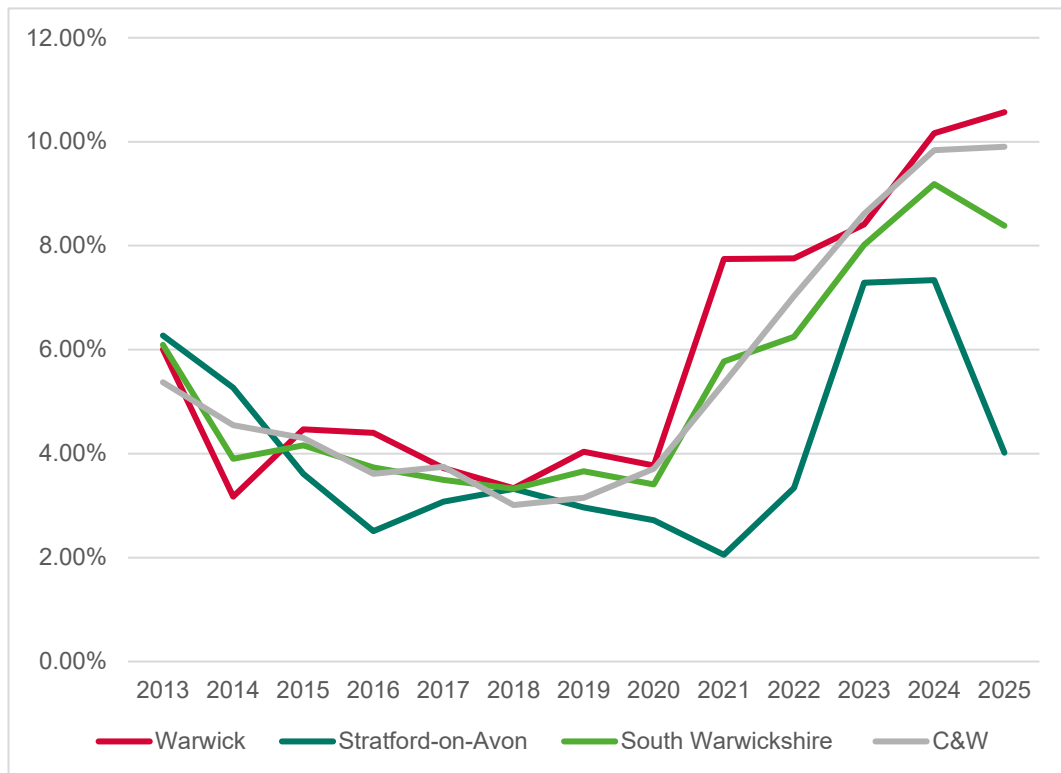
5.1 Drawing on the findings from the Affordable Business Space Study:

- Warwick/Leamington is the largest office sub-market in the Coventry and Warwickshire sub-region with over 5.2 million sq.ft of floorspace, representing 25% of the sub-region's total stock. Stratford is the 4th largest market in the sub-region with 2.7 million sq.ft of office stock;
- There is currently no office stock under construction and nothing has been delivered over the past 12 months;
- Warwick achieves the highest average rents for office space across the sub-market area. Rents of £17.46 per sq.ft are 12% higher than the regional average of £15.64 per sq.ft;
- Warwick has an availability rate of 11.5%, equivalent to 602,000 sq.ft, compared to 3.7% in Stratford (100,000 sq.ft). Availability in Stratford is evidently 'tight';
- Net Absorption over the preceding 12 months has been positive in Warwick (42,000 sq.ft) and Stratford (5,900 sq.ft). This is compared to considerable negative absorption in Coventry, Coventry Fringe, and North Warwickshire sub-markets, and the market area as a whole (-89,200 sq.ft).

5.2 The figure below shows that office vacancy rates in Warwick, at a district-level, is currently much higher than Stratford-on-Avon; and Coventry & Warwickshire (9.9%) at 10.6%. Stratford-on-Avon has a much lower office vacancy rate of 4.0%.

5.3 The high vacancy rate in Warwick is partly driven by a mismatch in the available supply of stock and what occupiers want, as a significant portion of Warwick’s office stock is outdated and not of high quality. Of the available floorspace in Warwick, only 11% is above a 4 star rating⁶ and 34% built in the past 25 years. However construction of speculative office units is not viable at achievable rents.

Figure 5.1 Office Vacancy Rates



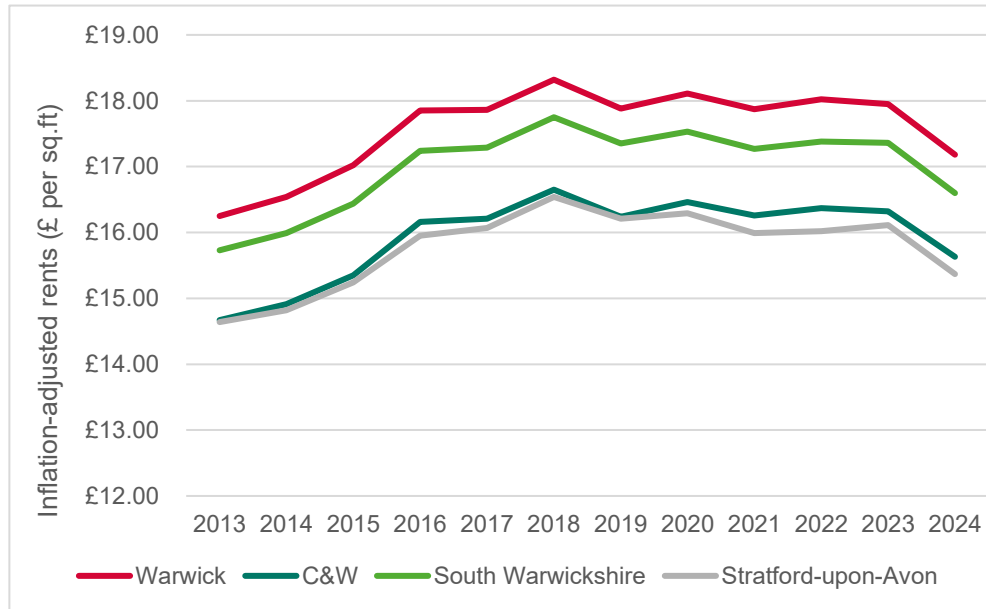
Source: CoStar 2025

5.4 Average inflation-adjusted office rents are shown in the figure below and indicate that Warwick rents are higher than the Coventry & Warwickshire average and Stratford-on-Avon at £17.21 p.s.f. Average office rents in Stratford-on-Avon sit at £15.39 p.s.f as of December 2025. Office rents have been declining since 2018 and this lack of

⁶ CoStar Rating

growth is preventing the development of new office premises which would require towards £30 p.s.f rent to be viable.

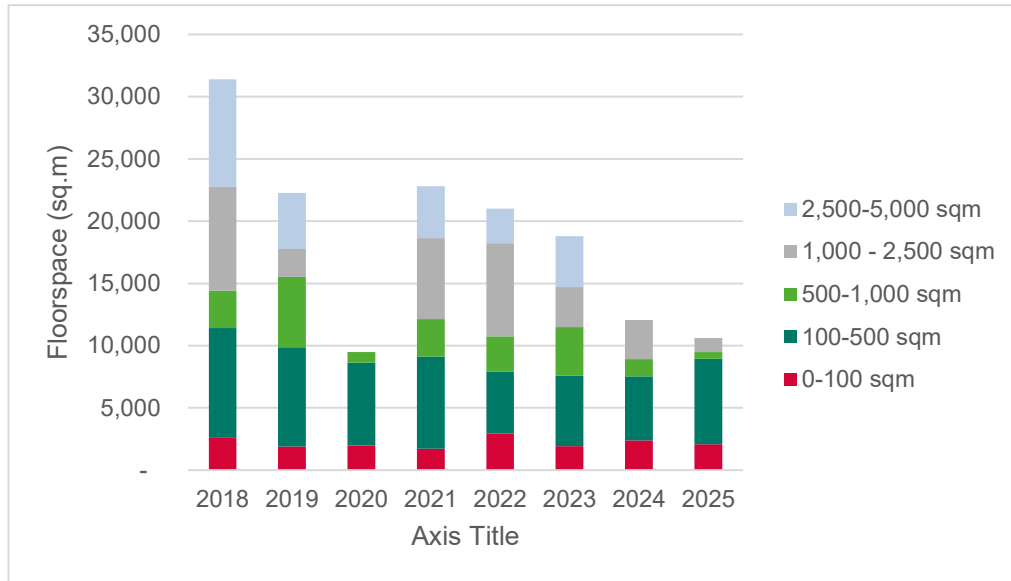
Figure 5.2 Office Inflation-Adjustment Rents (£/sq.ft)



Source: CoStar 2025

- 5.5 The figure below shows the take-up of office floorspace by size of deal, for the 2018 to 2025 period. A majority of floorspace leased was within the 100-500 sq.m size band which made up 36.1% of take-up. This is followed by 21.6% of take-up in the 1,000-2,500 sq.m size band. Demand is thus driven by small SME businesses.
- 5.6 The chart clearly indicates a notable downward trend in office floorspace take-up over the 8 year period shown.

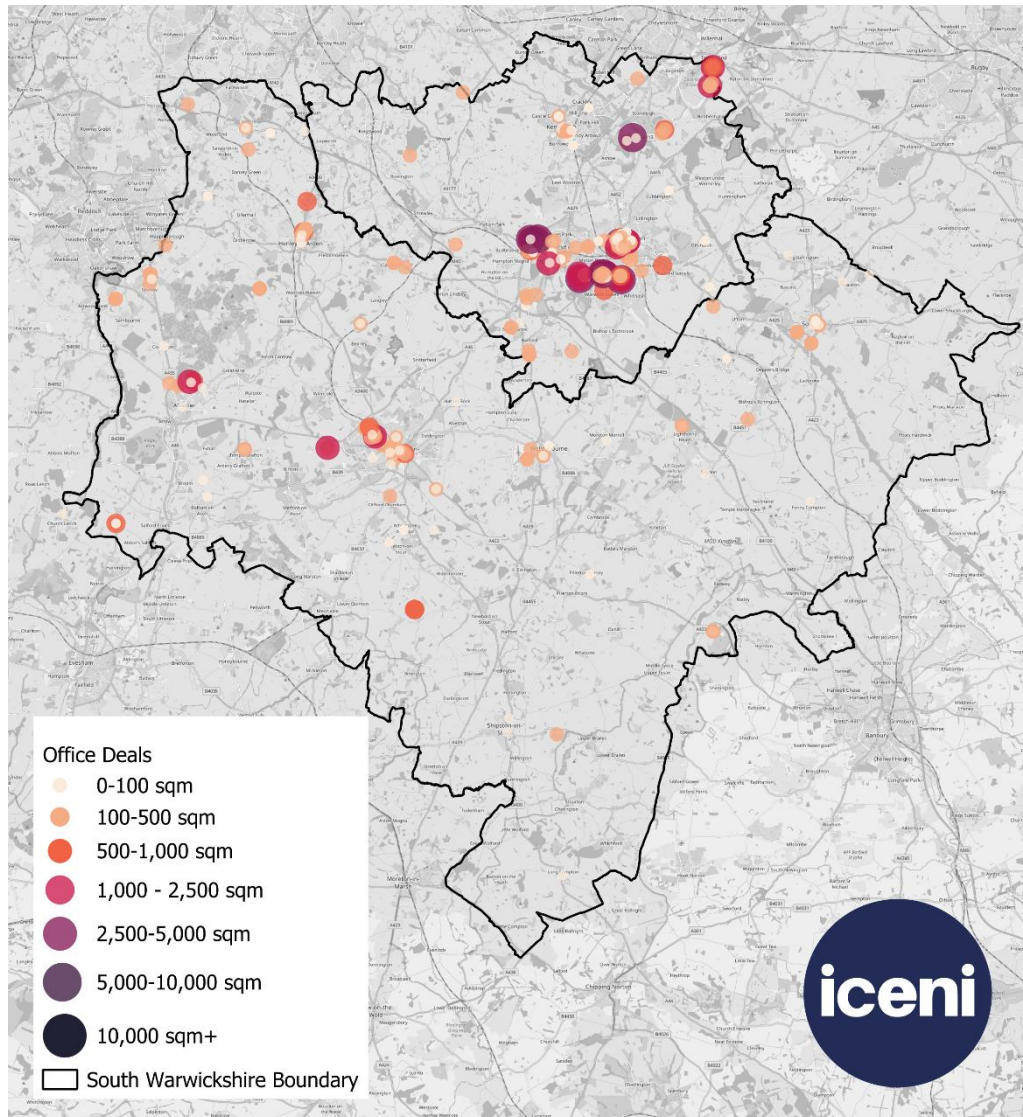
Figure 5.3 Office Take-up by Size Band 2018-25 (sq.m)



Source: CoStar 2025

5.7 The map below shows the spatial distribution of office deals since 2018 with a majority of activity concentrated in Leamington Spa, in particular the Town Centre where a majority of activity is for properties smaller than 500 sq.m. There have been some larger deals at Tachbrook Park and Warwick Technology Park. Kenilworth has seen a limited amount of smaller office deals. Stratford-on-Avon has seen some moderate office leasing activity, with most deals smaller than 500 sq.m and focused on local SME businesses. There were also some lettings at Alcester, Southam and Wellesbourne recorded by CoStar.

Figure 5.4 Map of Office Deals 2018-25



Source: CoStar/Iceni

Office Availability

5.8 According to CoStar there are 105 office properties with available floorspace, totalling 65,100 sq.m, at January 2026. This includes:

- 14,600 sq.m at Warwick Technology Park – including 3,900 sq.m at Globe House, 5,800 sq.m at Warwick Innovation Centre and 3,000 sq.m at K1 (1 Kingmaker) renovated in 2024 but still vacant.
- 4,960 sq.m at Point 3 at Opus 40 in Warwick;

-
- 5,900 sq.m in Leamington Spa Town Centre – of which 1,800 sq.m is at 76 The Parade (built 2022);
 - 4,450 sq.m at Middlemarch Business Park of which 2,309 sq.m is in Arden House (whole property);
 - 8,300 sq.m at Tachbrook Park of which 2,900 sq.m is at Aura, 1,900 sq.m at Hyperion House and 1,600 sq.m at Pure Offices (co-working);
 - 1,580 sq.m in Stratford-upon-Avon Town Centre.

5.9 There is a further 11,920 sq.m advertised as available at Abbey Park, however this has not yet been built out and is unlikely to come forward, as discussed further in Section 6.

Agent Engagement - Office

- 5.10 The following commentary draws on engagement with local agents, the Coventry & Warwickshire Chamber of Commerce and stakeholder engagement carried out for the Affordable Business Study to gain insight into the current state of the commercial market, the profile of enquires received and where there are gaps in the supply provision.
- 5.11 Agent engagement confirms that the office market across South Warwickshire is highly variable between towns, both in terms of rental performance and depth of demand. Agents further note that the office market is currently challenging across much of the sub-region, with very limited appetite from developers or investors to bring forward speculative office schemes.
- 5.12 Leamington Spa represents the strongest office location within the plan area, commanding rental premiums relative to other centres. Warwick has historically performed relatively well but agents report that the market has become harder in recent years. By contrast, markets such as Stratford-upon-Avon operate at materially lower rental levels and have experienced weaker occupational performance.

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- 5.13 Stratford-upon-Avon has a comparatively small office market, which has experienced long-term under-occupancy. This is partly attributable to the delivery of new office space prior to the 2007/08 recession, some of which has struggled to fully let in the years since. As a result, rental values remain significantly below those achieved in Leamington Spa.
- 5.14 Overall, agents describe the volume and choice of office stock across the plan area as limited. A significant proportion of office accommodation across South Warwickshire comprises older, often converted buildings. There is limited purpose-built modern office space and effectively no Grade A provision. Where refurbishment schemes have been successful, these tend to involve high-quality, well-located assets.
- 5.15 In Leamington Spa in particular, much of the office stock is dated and no longer fully aligned with modern occupier requirements. Common shortcomings include:
- Lack of open-plan layouts;
 - Limited flexibility in configuration
 - Absence of breakout and collaborative spaces
 - Sub-optimal servicing and infrastructure
- 5.16 Constraints are further compounded by the extent of conservation area designations in Leamington Spa, which restrict the scale and nature of alterations that can be undertaken to modernise premises.
- 5.17 While some refurbishment and repurposing activity is occurring — including the conversion of former retail premises such as the House of Fraser building (now Bedford Street Studios, leased by Sumo Group) — such schemes remain relatively limited in number.

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- 5.18 In some cases, upper-floor retail space is being explored for alternative uses but not all space will be suitable or attractive for office space. In many instances, appraisals will show a higher value for residential uses.
- 5.19 Agents report that overall demand for traditional office space has reduced following the shift toward hybrid and flexible working patterns and we note that this is borne out in the evidence of take-up (as shown in Table 3.3). However, this has not fully eliminated demand; rather, it has altered its form. There has been increased interest in:
- Flexible office formats;
 - Co-working provision;
 - Shorter leases; and
 - More affordable and adaptable space.
- 5.20 Co-working operators are increasingly filling a gap in the market by providing flexible, lower-commitment space suited to SMEs and start-ups. This model is meeting some of the demand generated by hybrid working patterns, particularly for early-stage businesses.
- 5.21 Occupiers are generally more flexible in how they use space, but they still seek high-quality environments that support collaboration and staff retention.
- 5.22 Leamington Spa has developed a notable cluster in gaming and digital industries (as discussed in Section 3). However, agents highlight that the supply of high-quality office accommodation suitable for emerging industries such as digital, tech and gaming is limited.
- 5.23 Power capacity has emerged as a specific constraint. Some gaming occupiers have encountered challenges meeting high electricity demand within existing office buildings. In some cases, occupiers have funded their own infrastructure solutions, such as private substations, to meet operational requirements. Even in refurbishment schemes,

developers are often providing only minimum power upgrades, limiting suitability for energy-intensive digital businesses.

5.24 There is currently limited supply of new-build office space available across the plan area. Despite this constrained availability, new build office development is generally regarded by agents as unviable under current market conditions at the time of writing. Agents consistently state that “sheds and beds” (industrial and residential) dominate land value considerations, with office development unable to compete on viability grounds. In some cases, existing office parks are being considered for redevelopment to industrial use.

5.25 Prime rents remain well below £30 per sq.ft, which is the level necessary to support new development. They are nearer £20 per sq.ft for prime space in Leamington Spa at the time of writing. As a result, there is a very limited development pipeline and little prospect of significant new Grade A provision in the short to medium term.

5.26 Overall therefore, **the market signals evidence points to particular viability challenges for new-build office development. In this context, it would not be appropriate to allocate a significant quantum of land for new-build offices** as speculative office development is unlikely in the short/medium-term.

5.27 Overall, agents conclude (and Icenic concur) that without a significant shift in rental levels or intervention to improve viability, the delivery of significant new office floorspace in South Warwickshire is unlikely in either the short- or medium-term. There is however some potential for viability to improve over the plan period to 2050.

Delivering Office Space

5.28 The question then arising is of how to deliver office space to facilitate growth in office-focused activities.

5.29 We consider that there is some potential for office floorspace development by owner occupiers (such as through an occupier working

with a developer/contractor on a site they own/acquire or on a forward-funding/ turnkey basis where they commit to purchasing the completed building). However this is likely to be focused on larger and more established businesses who specifically want to be located in the local area. Policies within the Plan should support such development on suitable sites but it may be difficult to bring forward specific large allocations for E(g) office space on this basis.

5.30 Another means of delivering office floorspace is through the conversion of existing buildings, where the conversion and fit-out costs may be lower than for new-build development. The delivery of office floorspace through the conversion of the former House of Fraser unit in Leamington Spa is one such example; however equally there may be opportunities for the delivery of smaller office schemes through barn conversions in more rural parts of South Warwickshire.

5.31 The potential for conversion will be influenced by the nature of the building and location, such as whether it provides potential to create open plan floorplates, its transport accessibility and parking provision etc.

Policy Implications: Delivering Office Space

The market signals evidence indicates whilst there is a level of underlying occupier demand for modern office space, rents are insufficient to support substantive speculative development and the scale of new-build office development in South Warwickshire is likely to be modest in the short/medium-term. In this context, there is little case for allocating a substantial quantum of land for office development as it is unlikely to be developed.

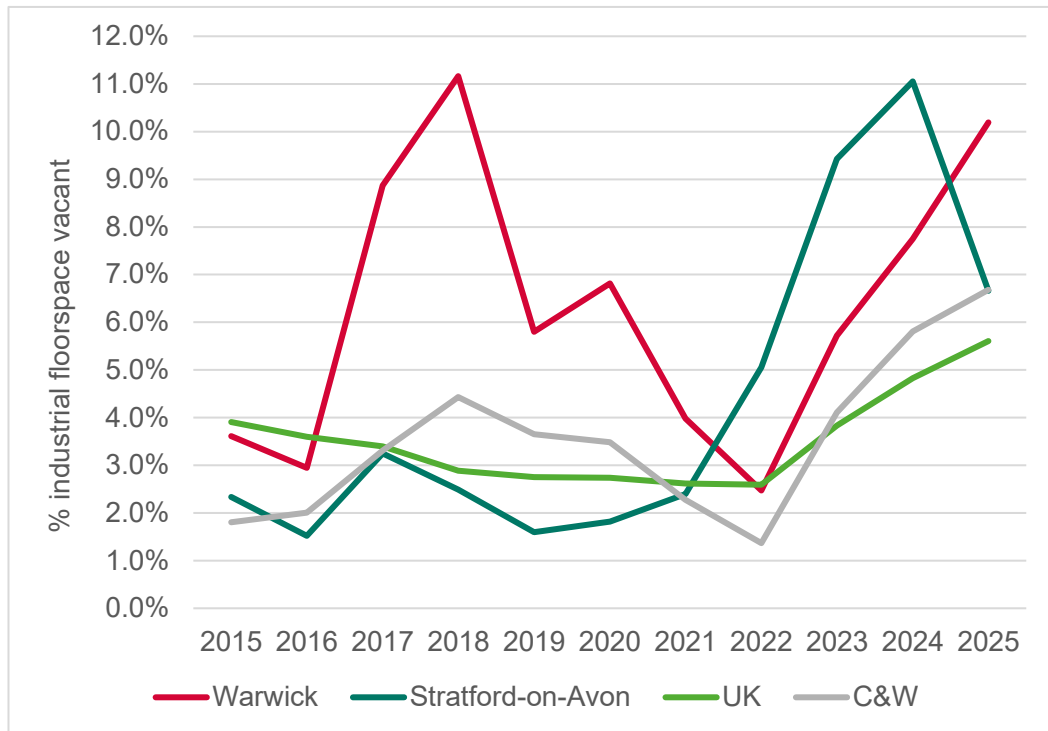
Policies within the South Warwickshire Local Plan should nonetheless support office floorspace development on appropriate employment sites – including in town centres, as well as the conversion of existing buildings to provide office floorspace where these are sustainably

location. The evidence points to the potential some office development to be delivered through the repurposing of retail space within the main town centres in the plan area and for some smaller-scale provision to be delivered through conversion of rural buildings to support the rural economy and small business base. The Plan's policies should support this.

Industrial

- 5.32 The following section provides analysis on the South Warwickshire industrial market. The section makes reference to small units (typically >2,000 sq.m); mid-box (2,000-10,000 sq.m); and big box units (>10,000 sq.m).
- 5.33 As shown on the graph below, vacancy rates for industrial space in both Warwick and Stratford-on-Avon have been rising since 2022, with the increase starting slightly earlier in Stratford-on-Avon (in 2021). South Warwickshire has seen a recent period of market correction following strong demand during the pandemic which resulted in sub-5% vacancy, particularly in Stratford-on-Avon. This aligns with broader national trends where there a spike in demand related to the pandemic effect on e-commerce growth and trade disruptions.
- 5.34 As of the end of 2025, the vacancy rate in Warwick District reached 10.2%. In Stratford-on-Avon the vacancy rate is slightly lower at 6.7%, having fallen from a historical peak in 2024 of 11%.
- 5.35 A healthy commercial market typically sees vacancy rates of 5-10%, with the latest evidence indicating that South Warwickshire has sufficient vacancy in the market to allow for market flexibility and occupier choice.

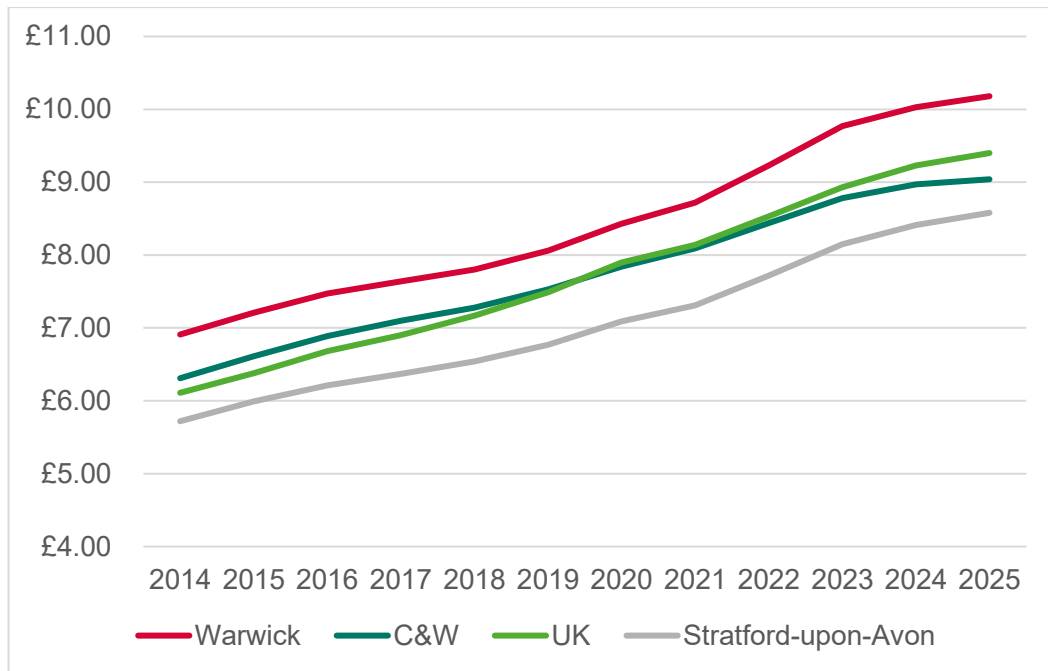
Figure 5.5 Industrial Vacancy Rates



Source: CoStar, 2025

- 5.36 The figure below sets out inflation-adjusted industrial market rents. Industrial rents have been steadily increasing, at an average annual rate of 3.8% over the past decade in Stratford-upon-Avon compared to 3.6% shown in Warwick. Rising industrial rents points to demand pressures and a supply-demand imbalance.
- 5.37 Warwick however performs better than Stratford-on-Avon on rents, with an average rental value of £10.19 p.s.f compared to £8.58 p.s.f in Stratford-on-Avon. This reflects geographical considerations: with core locations better located in terms of their access to the Strategic Road Network.

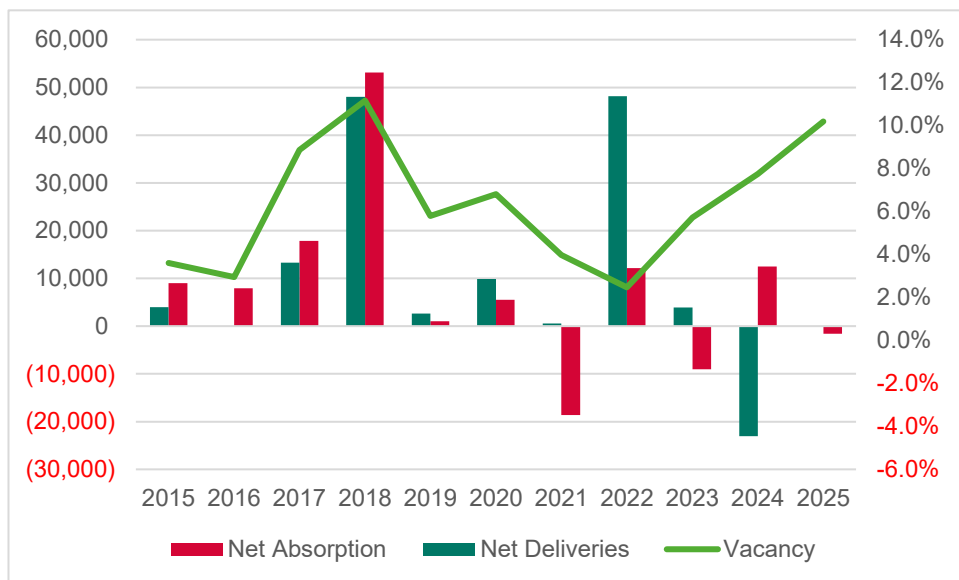
Figure 5.6 Industrial Inflation-Adjustment Rents (£/sq.ft)



Source: CoStar 2025

- 5.38 The figure below sets out net deliveries, net absorption and vacancy rates across the Stratford-upon-Avon area. Net absorption represented the net change in occupied space (taking account of move ins – move outs).
- 5.39 Net absorption in Stratford-on-Avon has fluctuated year on year since 2020, with limited market activity occurring in 2025. With a year of strong deliveries in 2022 (i.e. significant new-build development), subdued subsequent net take-up has seen the vacancy rate rise. This is a reflection of wider economic conditions – including a weak economic backdrop with higher interest rates and energy costs.
- 5.40 However it is only in 2025 that the vacancy level in Stratford-on-Avon has risen beyond that which might be expected in a healthy market. Over the 2019-23 period, there were limited levels of vacant space in South Warwickshire, and this may have suppressed the take-up of industrial space.

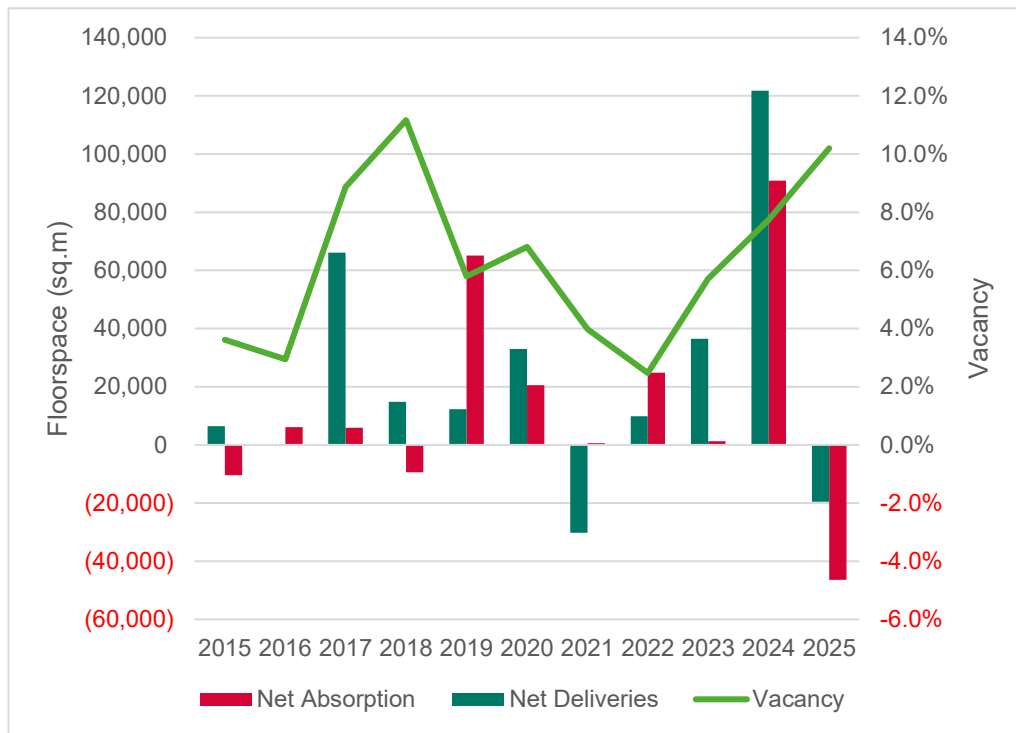
Figure 5.7 Net Deliveries, Net Absorption and Vacancy Rates – Stratford-upon-Avon



Source: Costar, 2025

- 5.41 In Warwick District, net absorption has been mostly positive, with significant net take-up in 2024 of 90,800 sq.m following a year of higher deliveries, associated with the completions of units at Segro Park Coventry. However net absorption turned negative in 2025, leading to a further rise in the vacancy rate to a level which now exceeds 10%.
- 5.42 Over the past decade, average annual net absorption has been 13,500 sq.m, compared to average annual net deliveries of 22,800 sq.m. This includes strategic unit deliveries (i.e. big box units of > 9,300 sq.m) at Segro Park Coventry. Vacancy levels were low in particular between 2020-23.

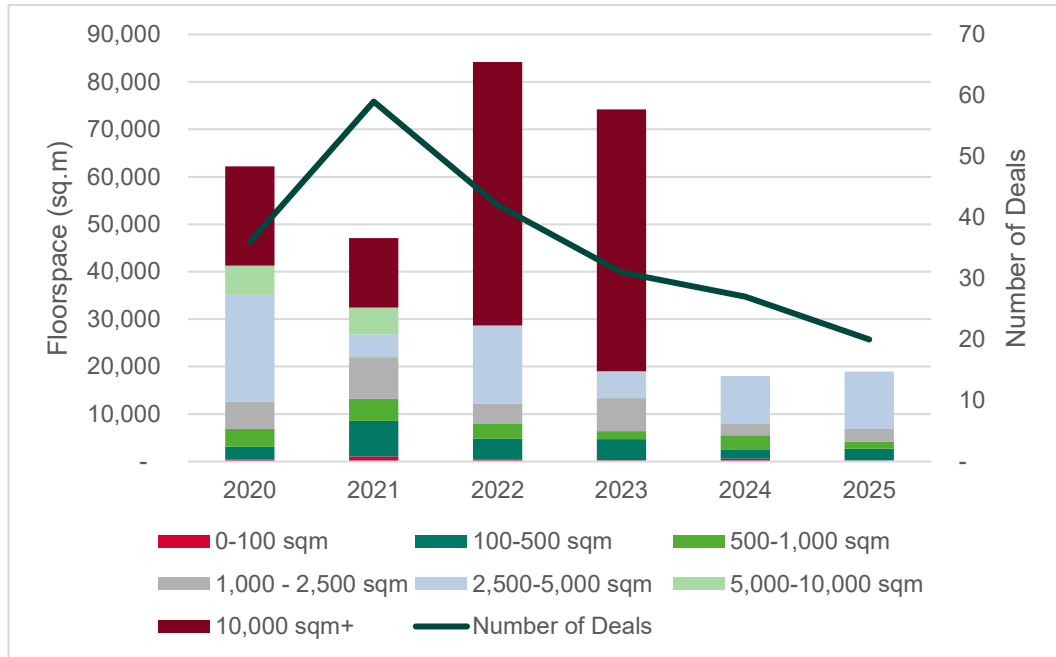
Figure 5.8 Net Deliveries, Net Absorption and Vacancy Rates – Warwick



Source: Costar, 2025

- 5.43 The figure below show leasing activity for Warwick by size band. Leasing activity peaked in 2021 with the deal count declining year on year since, with just 20 deals in 2025. The greatest take-up has been in big box units over 10,000 sq.m, however this was concentrated in just 6 deals over the 5-year period.
- 5.44 In terms of deal count, out of the 215 deals 2020-25 in Warwick District, nearly 50% of deals were for units of 500 to 1,000 sq.m at 99 deals, followed by 43 deals (20%) in sub-100 sq.m and 25 deals in 1,000 to 2,500 sq.m units (12%).

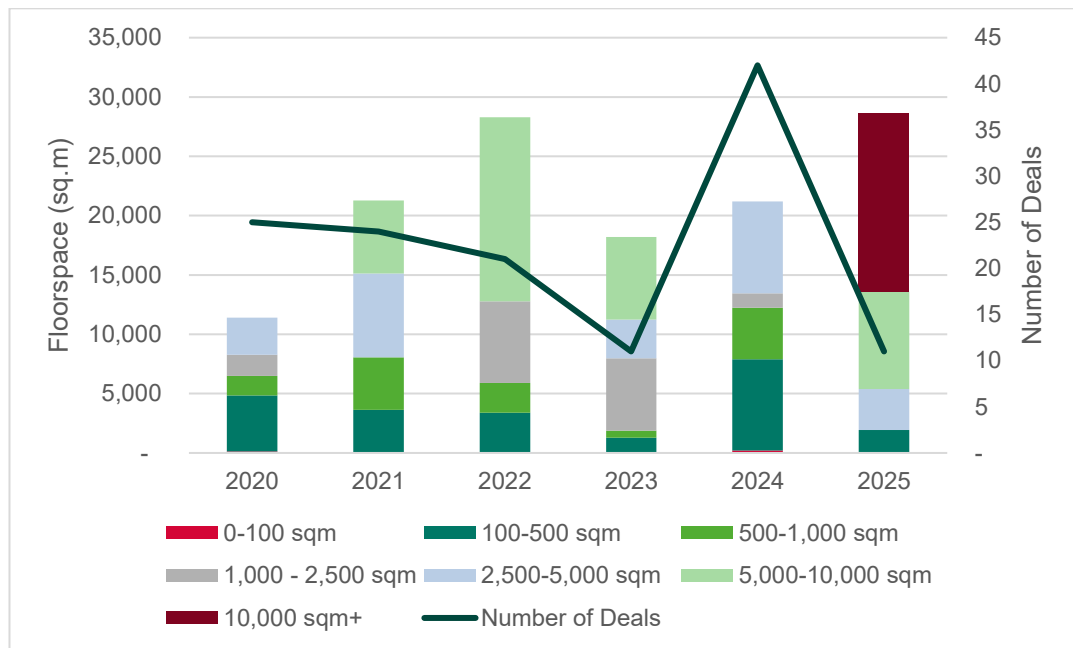
Figure 5.9 Warwick Industrial Take-up by Size Band (2020-2025)



Source: CoStar 2025

- 5.45 In Stratford-on-Avon, leasing activity has varied year on year with the deal count spiking to 42 deals in 2024, sharply falling down to just 11 deals in 2025. There was strong take-up of 100 to 500 sq.m units, making up 22,600 sq.m of take-up across 89 deals (66% of total deal count).
- 5.46 There has been just one deal over 10,000 sq.m (Redditch Gateway 2025) and 5 deals in the 5,000 to 10,000 sq.m band range, located at Wellesbourne and Long Marston. The industrial market in Stratford-on-Avon District is thus more focused towards SME demand for smaller and mid-box units.

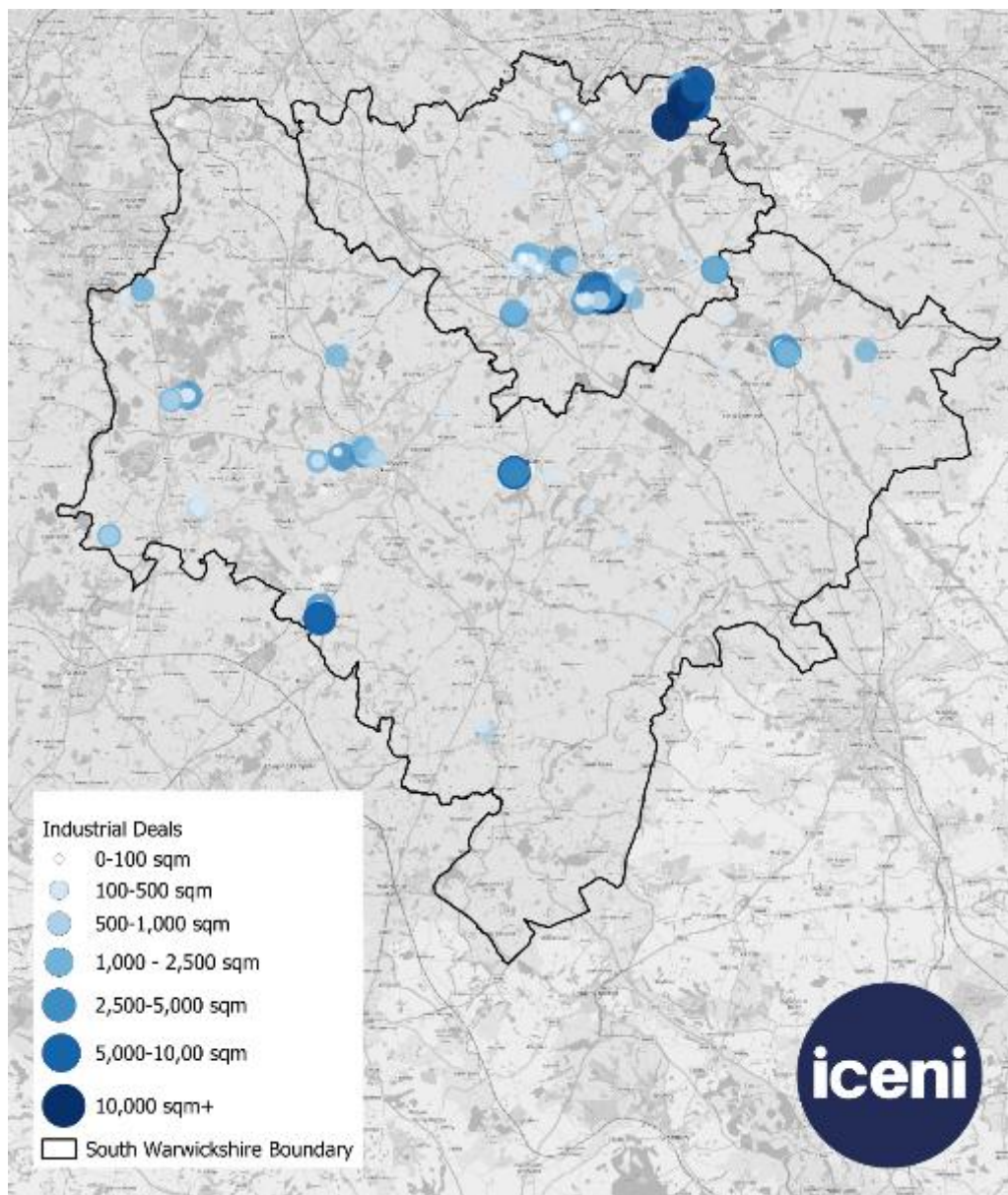
Figure 5.10 Stratford-on-Avon Industrial Take-up by Size Band (2020-2025)



Source: CoStar 2025

5.48 The map below shows the spatial distribution of the industrial deals since 2018. The largest deals are concentrated around Coventry Airport at Middlemarch Business Park and Coventry Gateway; with some larger deals also at Wellesbourne and Meon Vale. Mid and small box activity is concentrated in Warwick and Leamington (Spa Park, Heathcote Industrial Estate and west Warwick). There has been some activity in Stratford-on-Avon along Timothy's Bridge Road in Stratford, as well as in Alcester and Southam.

Figure 5.11 Industrial Deals 2020-25



Source: CoStar 2025

5.49 The table below sets out the current availability within Warwick District by size band within existing and proposed units. There is 118,000 sq.m of industrial space available across 51 existing properties and 595,000 sq.m across 11 proposed units.

5.50 Within existing stock a majority of availability is within units of 2,500 sq.m and below. However availability at Stratford Road and Opus 52 at Warwick and Leamington will bring forward some mid-size stock. Proposed big box availability is concentrated at the sub-regional site.

5.51 There is limited availability of existing start-up units sub-100 sq.m available, with no stock in the proposed pipeline either.

Table 5.1 Industrial Availability by Size Band – Warwick – December 2025

Size band	Existing		Proposed	
	Floorspace (sq.m)	No. of Properties	Floorspace (sq.m)	No. of Properties
0-100 sqm	431	5		
100-500 sq.m	3,528	12		
500-1,000 sqm	6,814	10		
1,000-2,500 sqm	18,088	13		
2,500-5,000 sqm	27,102	7	3,716	1
5,000-10,000 sqm	7,597	1	7,647	1
10,000 sqm+	54,307	3	583,991	9
Total	117,867	51	595,354	11

Source: CoStar, 2025

5.52 As of December 2025 there were 29 available units in Stratford-on-Avon, There is a similar picture to Warwick, with the greatest availability in the 100 to 500 sq.m and 500 to 1,000 sq.m size band. There is

limited availability of existing units over 2,500 sq.m and start-up units sub-100 sq.m.

5.53 A further 6 industrial properties are advertised as available but not yet built, including 5 units at Stratford 46 ranging from 1,898 to 11,859 sq.m and the next phase of development at Oak Tree Court Alcester, providing up to 1,300 sq.m of new floorspace.

Table 5.2 Industrial Availability by Size Band – Stratford-upon-Avon

Size band	Existing		Proposed	
	Floorspace (sq.m)	No. of Properties	Floorspace (sq.m)	No. of Properties
0-100 sqm	175	2		
100-500 sq.m	3,031	11		
500-1,000 sqm	4,644	7		
1,000-2,500 sqm	6,000	5	2	3,205
2,500-5,000 sqm	2,936	1	1	4,646
5,000-10,000 sqm	6,985	1	1	9,290
10,000 sqm+	26,826	1	2	23,256
Total	78,468	29	6	40,397

Source: CoStar, 2025

5.54 Across South Warwickshire there are 18 units of over 5,000 sq.m available:

- SPC 140 and SPC220 Segro Business Park Coventry – 13,038 sq.m and 20,465 sq.m, built 2024
- Vulcan, Middlemarch Business Park– 7,597 sq.m, built 1990
- Axiom, Precision Park, Leamington Spa - 20,804 sq.m, built 2006, renovated 2025

-
- Redditch Gateway – 26,826 sq.m, built 2023
 - Unit 41, Meon Vale Business Park – 6,985 sq.m, built 1963.
 - Opus 82, Leamington Spa – 7,647 sq.m, pre-let opportunity, pre-planning
 - Stratford 46 – four units ranging from 4,600 to 11,900 sq.m
 - Segro Park Coventry – four units ranging from 17,400 to 100,517 sq.m
 - Green Power Park (Coventry Airport) – five units advertised ranging from 46,500 to 116,100 sq.m.

Agent Engagement – Industrial

- 5.55 The following analysis draws on engagement with local agents, the Coventry & Warwickshire Chamber of Commerce and stakeholder engagement carried out for the Affordable Business Study to gain insight into the current state of the commercial market, the profile of enquires received and where there are gaps in the supply provision.
- 5.56 Agents consistently described a strong post-pandemic spike in demand across all unit sizes, with take-up filtering through into both new-build and second-hand stock. Rental and capital growth accelerated between 2020 and 2022, supported by e-commerce growth, increased stock holding requirements and investor confidence.
- 5.57 However, market demand has since weakened due to the rapid increase in interest rates, the ‘mini-budget’ of late 2022 which affected market confidence, and the following November 2024 budget and associated tax rises which further dampened business sentiment.
- 5.58 The market has come off its peak however demand is described as remaining above long-term trends with occupiers and developers more cautious, increasingly sensitive to economic and political signals, with business decisions taking longer and subsequent property decisions being delayed.

-
- 5.59 Agents identified clear segmentation in performance by unit size. Demand for big box units (9,300+ sq.m / 100,000+ sq.ft) has dropped off dramatically since its pandemic peak, investor appetite has become more selective and speculative development is being reconsidered.
- 5.60 In the mid-box market ranging from 2,000 sq.m to 100,000 sq.ft, there remains occupier interest, however build cost and financing are delaying delivery of new-build development which has caused a squeeze in supply.
- 5.61 The small unit market (<2,000 sq.m) is the strongest performing at the time of assessment in Winter 2025/26, seeing continued demand, with a significant gap in availability. However, despite this demand, agents are seeing increased pushback from occupiers on rents, due to affordability issues.
- 5.62 Agents noted that viability pressures are an increasing theme due to increased construction costs, fluctuating exit yields and banking and legal institutions becoming more risk-adverse in their lending positions. Smaller new-build schemes are most vulnerable to these viability issues, as these schemes have been underpinned by assumptions of continued rental growth, which has eased since the pandemic.
- 5.63 Agents noted that Meon Vale in Long Marston continues to provide budget space at c.£5 per sq.ft. Some occupiers within the area will trade location and quality for lower rents; with the rental tone lower further away from the motorway network.
- 5.64 In regards to SMEs, the Affordable Business Space Study highlights that SMEs are often trapped in sub-optimal premises, there is a lack of grow-on-space and affordable space is not being delivered alongside new development. Agents suggested incorporating SME-focused or affordable provision within larger I&L schemes may be feasible.

Policy Implications: Industrial Market Signals

Overall, the stakeholder engagement confirms that the South Warwickshire industrial market remains supply constrained but is operating in a more cautious, viability-sensitive climate than during the post-pandemic peak.

Demand remains strongest for small units, with weakening large-box activity at the time of writing and a clear mid-box delivery gap, compounded by infrastructure constraints, rising costs, planning pressures and SME affordability challenges.

While demand has moderated, it remains structurally above historic trends; the key constraints are land supply, infrastructure capacity, viability and delivery barriers rather than lack of occupier need. Without additional, targeted employment land – across a range of different unit sizes - there is a risk of constrained growth, rental inflation and economic leakage.

6. Employment Land Needs Position

- 6.0 The Coventry & Warwickshire Housing and Economic Development Needs Assessment (HEDNA) (2022) set out needs findings for each local authority with a local and office industrial need for the 2021-41 and 2021-50 periods. In addition, the report also reported a Strategic B8 need of 551ha to 2041 and 735ha to 2050. The local industrial need in the HEDNA included all B2 development; and B8 development of units < 9,300 sq.m.
- 6.1 Since the publication of the HEDNA, the West Midlands Strategic Sites Study (WMSESS) has identified an overall need for strategic sites across the West Midlands, for both B2 and B8 uses. It has identified areas of opportunity for strategic sites, assigning them a notional quantum. This Study was dated August 2024.
- 6.2 The Coventry & Warwickshire HEDNA and WMSESS 'Alignment Paper' has then been prepared by Icen Projects to bring together the evidence on employment land needs. This disaggregates the industrial need between that for strategic sites and non-strategic sites. It was finalised in November 2024.
- 6.3 The Alignment Paper provides an assessment of local industrial needs for units of <9,300 sq.m using the most recent monitoring data (2023/24), and identifies what development strategic-sized units (> 9,300 sq.m) might be expected to take place on local (non-strategic) sites. In doing so it segments overall industrial land needs between:
- **A strategic sites need**, which was taken from the WMSESS but adjusted to take account of further commitments; and
 - **A local industrial need**, which comprises the need for both smaller units (< 9,300 sq.m) and big box units on non-strategic sites.
- 6.4 This study uses the industrial needs findings from the Coventry & Warwickshire HEDNA Alignment Paper, which are summarised below.

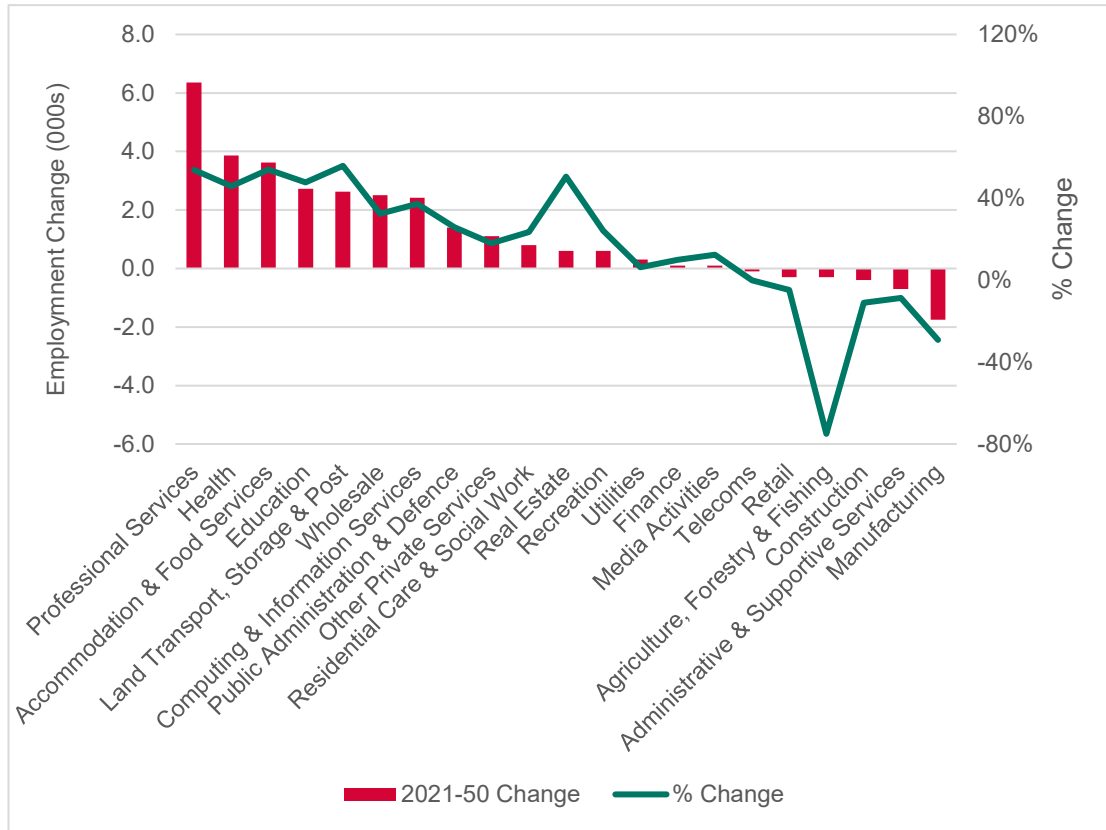
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- 6.5 The need for offices was not updated within the Coventry & Warwickshire Alignment Paper and thus updated office needs modelling has been undertaken within this report.

Office Needs

- 6.6 This section provides an updated analysis of office floorspace needs from that in the HEDNA to take account of more recent evidence and capture post-Covid market signals. It is necessary to do so given that the HEDNA was undertaken during Covid when there was considerable uncertainty regarding the implications of changing working patterns.
- 6.7 Icenis has obtained updated 2025 econometric forecasts from Experian to derive an updated labour demand model. In addition, alternative trend-based models have also been run, relying on completion and net absorption trends. This is then brought together with the market signals analysis and stakeholder engagement (as considered in Section 3) in drawing conclusions, in accordance with the approach in the PPG.⁷
- 6.8 The figure below shows the sectoral breakdown of the Experian forecasts for Warwick District over the 2021-50 period. Overall, the Experian forecasts indicate a total employment growth of 25,600 jobs in Warwick, equivalent to a 25% growth or 883 jobs per annum.
- 6.9 The strongest employment growth is forecasted in professional services (+6,400 jobs), Health (+3,900 jobs) and accommodation and food (+3,600 jobs).
- 6.10 Sectors key to driving future office requirements are professional services, computing & information (+2,400 jobs), media activities (+100 jobs) and finance (+100 jobs).

⁷ ID: 2a-027-20190220

Figure 6.1 Warwick Employment Forecasts by Sector 2021-50



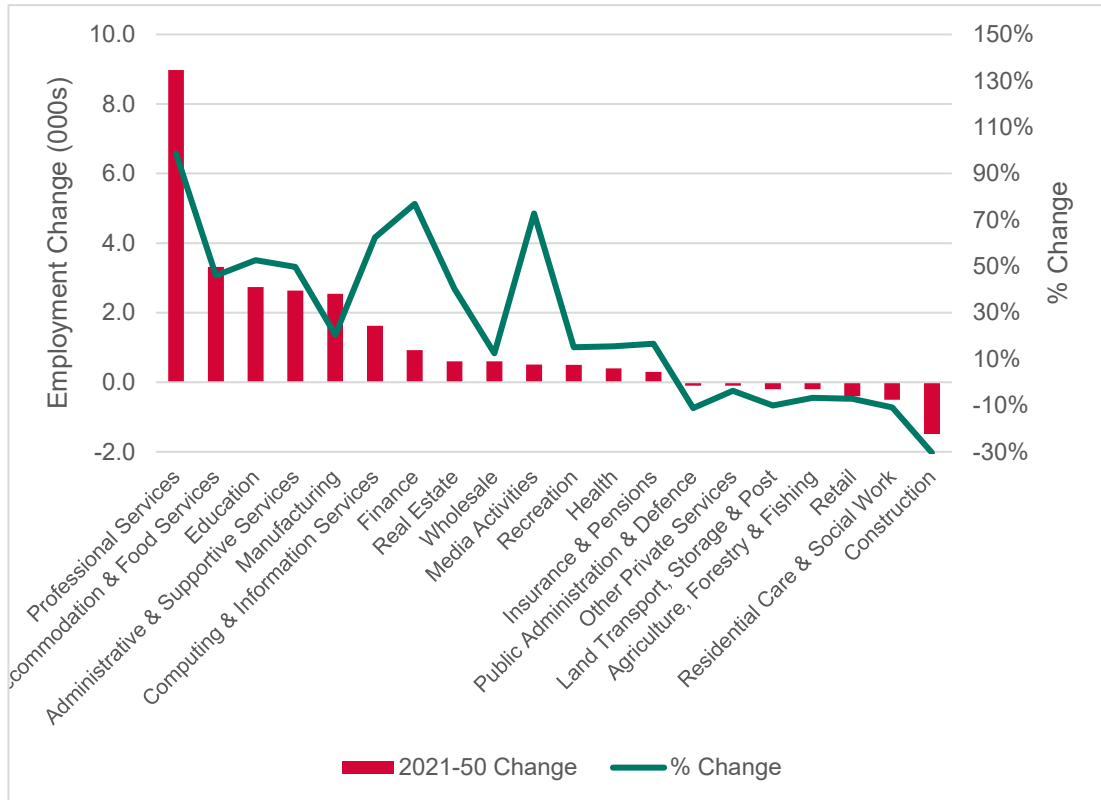
Source: IcenI analysis of Experian 2025

6.11 The figure below shows the sectoral breakdown of employment growth in Stratford-on-Avon for the 2021-50 period. The district is forecasted a total employment growth of 22,690 jobs, equivalent to a 21% increase or 782 jobs per annum.

6.12 Similar to Warwick, employment growth is driven by growth in professional services (+9,000 jobs), alongside accommodation and food (+3,300 jobs), education (+2,700 jobs), administration and support (+2,600) and manufacturing (+2,500 jobs).

6.13 Key sectors driving office demand include professional services, administration and support, computing and information (+1,600 jobs) and finance (+900 jobs).

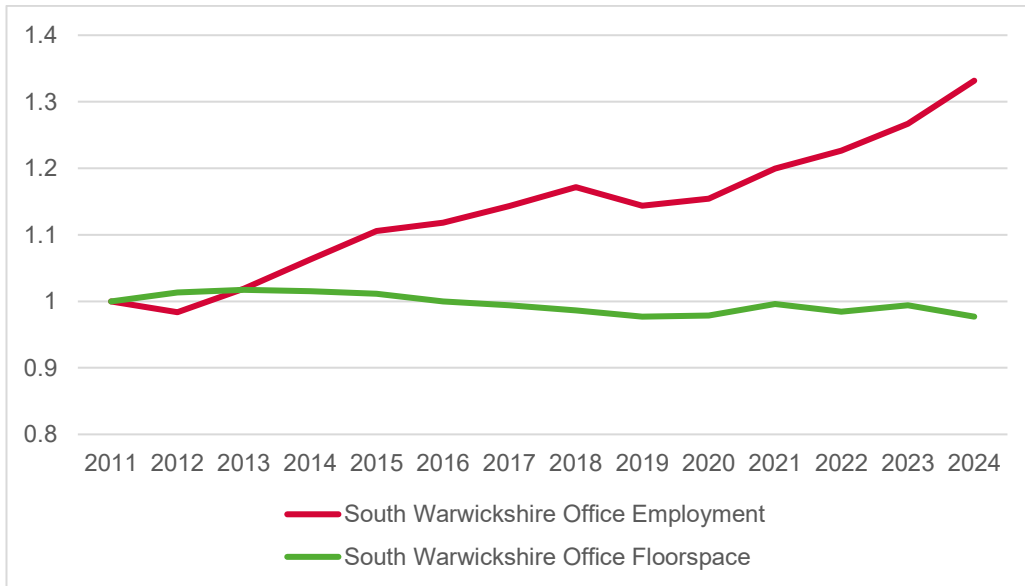
Figure 6.2 Stratford-on-Avon Employment Forecasts by Sector 2021-50



Source: Experian 2025

- 6.14 Historical employment growth in office sectors has been estimated applying use class sector assumptions and indexed. This has been compared to indexed office floorspace growth in South Warwickshire.
- 6.15 The figure below shows that whilst office-based employment has been increasing since 2011, the stock of office space has remained stable, indicating that employment growth within office-based sectors has been 'spaceless'.
- 6.16 This is an important dynamic to consider when estimating future office floorspace requirements as it indicates that labour demand modelling which translates employment growth into floorspace requirements may overestimate future requirements.

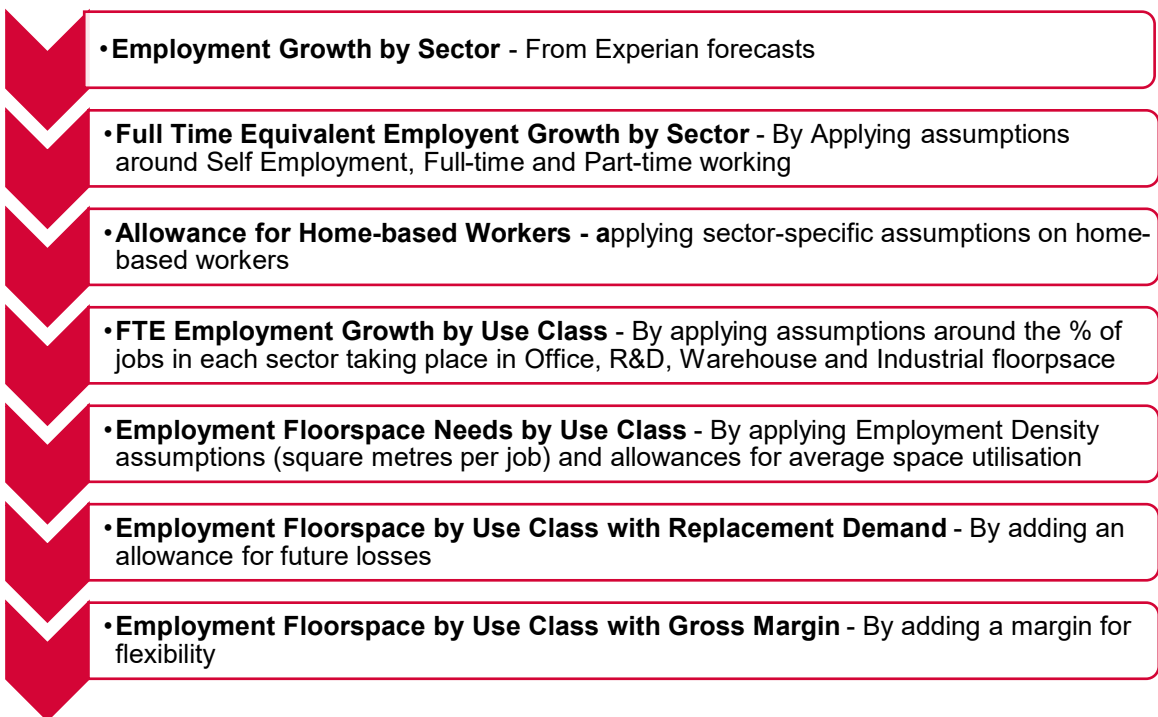
Figure 6.3 Indexed Office Floorspace and Office Employment



Source: Icen analysis of Experian and VOA 2025

6.17 The Experian employment forecasts are translation to employment floorspace requirements through a series of steps, summarised in the figure below.

Figure 6.4 Overview of the Labour Demand Model



- 6.18 The first step is to translate forecast employment growth into full-time equivalent (FTE) employment growth. This is required as the employment densities used relate to FTE jobs rather than total jobs. IcenI has used the current BRES ratios of part-time and full-time employment to generate the FTE outcomes.
- 6.19 The second step considers the proportion of workers in these sectors who are expected to be fully home-based rather than in a workplace. This is informed by data from the ONS Insights and Conditions Survey.
- 6.20 The next step translates FTE employment growth by sector into FTE employment growth by use class. For the purposes of this study, we have shown FTE jobs in offices (E(g)(i) and R&D space E(g)(ii)) only.
- 6.21 Across South Warwickshire as a whole, the Experian forecasts expect total employment growth of 48,300 jobs between 2021-50.
- 6.22 The table below shows the total forecasted employment change, the full-time equivalent and then of that, the proportion in office and R&D premises over the forecast period (2021-50).

Table 6.1 Change in Jobs, FTE and Office and R&D Jobs 2021-50

	Total Jobs	FTE Jobs	FTE Jobs in Office & R&D
Warwick	25,596	16,893	5,584
Stratford-on-Avon	22,690	16,450	8,850

Source: IcenI of Experian and BRES

- 6.23 To translate FTE employment growth to floorspace we have assumed an employment density of 14 sq.m per job for office. These are in line

with densities used in the HEDNA 2022 and are informed by the Homes and Communities Agency Employment Density Guide third edition⁸.

6.24 The latest research from the British Council for Offices (BCO) published in July 2025⁹ indicates that office utilisation – the proportion of office-based workers who are in the office has settled at an average of 30% across the week, with a higher figure of 40% between Tuesday – Thursday. Their research indicates that for space planning it would be appropriate to plan for an upper parameter of 66% of office-based workers being in the office to provide some flexibility and account for the higher mid-week occupancy. This compares to the pre-pandemic figure of 80%. We build this assumption of a reduced utilisation over the forecast period into the model in calculating office floorspace needs.

6.25 The table below shows the resultant office floorspace need. In line with the 2022 HEDNA, a margin equivalent to 2 years average gross completions (based on past 10 years) has been applied. This is equivalent to 6,100 sq.m for Warwick and 2,300 sq.m for Stratford-on-Avon.

6.26 Overall, the labour demand modelling suggests that there is a requirement for between 57,800 to 82,700 sq.m in Warwick and 94,600 to 134,100 sq.m in Stratford for the 2021-50 plan period.

Table 6.2 Office and R&D Floorspace Demand (sq.m) 2021-50

	Office & R&D	Including margin – 2 years average gross completions
Warwick	26,000	32,000

⁸ https://www.kirklees.gov.uk/beta/planning-policy/pdf/examination/national-evidence/NE48_employment_density_guide_3rd_edition.pdf

⁹ Review of Post Pandemic UK Office Utilisation, July 2025

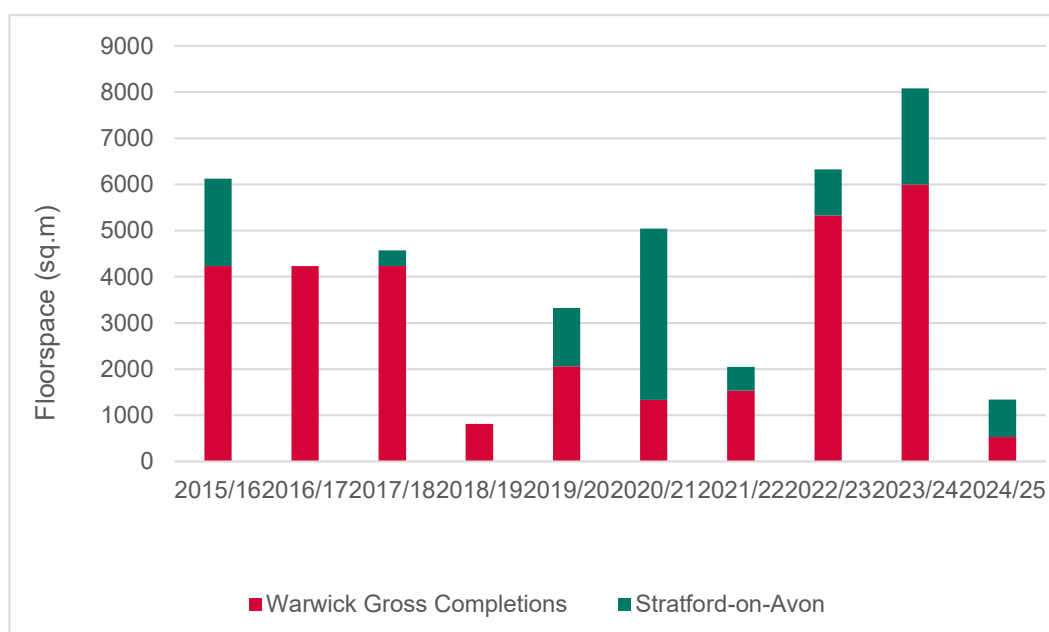
Stratford-on-Avon	69,900	73,200
South Warwickshire	95,900	105,200

Source: Icen analysis of Experian 2025

Completions Trend Model

6.27 Next we consider evidence of past development trends. Historical completions, based on Council monitoring data have been considered and projected forward to indicate future floorspace needs. Both gross and net historic completions have been considered.

Figure 6.5 Gross Completions 2015/16 to 2024/25



Source: Annual Monitoring Data

6.28 The table below shows the average trend of office gross completions and losses for Warwick and Stratford-on-Avon which is then used to derive the net completions trend. Monitoring data that breaks down completions by use class is only available for the 7-year period 2018/19-2024/25 and has been supplemented with CoStar data.

Table 6.3 Warwick and Stratford Average Completions Per Annum (2015/16 to 2024/25) (sq.m)

	Time Period	Average Gross Completions	Average Losses	Average Net Completions (Gross – Losses)
Warwick	10 Year	3,028	-3,108	-79
	5 Year	2,943	-2,141	802
Stratford-on-Avon	10 Year	1,163	-2,566	-1,403
	5 Year	1,691	-1,074	617

Source: Icen analysis of Council Monitoring Data, CoStar

Sensitivity: Replacement of Space Lost

There has been a significant amount of office floorspace lost across the plan area over the past decade. Given this dynamic in conjunction with market and agent feedback reporting that there is a lack of good quality office stock, a sensitivity has been run which makes an allowance for replacement at a rate of 20% of average historical average annual losses over the past decade for office space. This is equivalent to 14,900 sq.m for Stratford-on-Avon and 21,800 sq.m in Warwick, totalling 36,700 sq.m over the plan period. In terms of stock, this is equivalent to 5% of total office stock or 13% of pre-1990s stock.

Summary of Completions Models

- 6.29 The historic average completion rate for both gross and net completions has been projected forward over the 2021-50 plan period to estimate employment floorspace requirements. The result of the historic completions-based projections are presented in the table below.
- 6.30 Both models have a margin for flexibility equivalent to 2 years of gross completions.

Table 6.4 Employment Floorspace Requirement by Completions Projections, 2021-50 (sq.m)

	Gross Completions - 10 yr	Gross Completions - 5 yr	Net Completions - 10 yr	Net Completions - 5 yr
Warwick	87,800	85,400	-3,000	23,300
Stratford-on-Avon	33,700	49,000	-40,800	17,900
Including margin for flexibility (equal to 2 years average gross completions)				
Warwick	93,900	91,400	3,800	29,300
Stratford-on-Avon	36,000	52,400	-38,500	21,300
With Replacement Sensitivity – replacing 20% of historical losses				
Warwick			21,800	47,300
Stratford-on-Avon			-23,600	36,100

Source: IcenI analysis of Local Authority Data

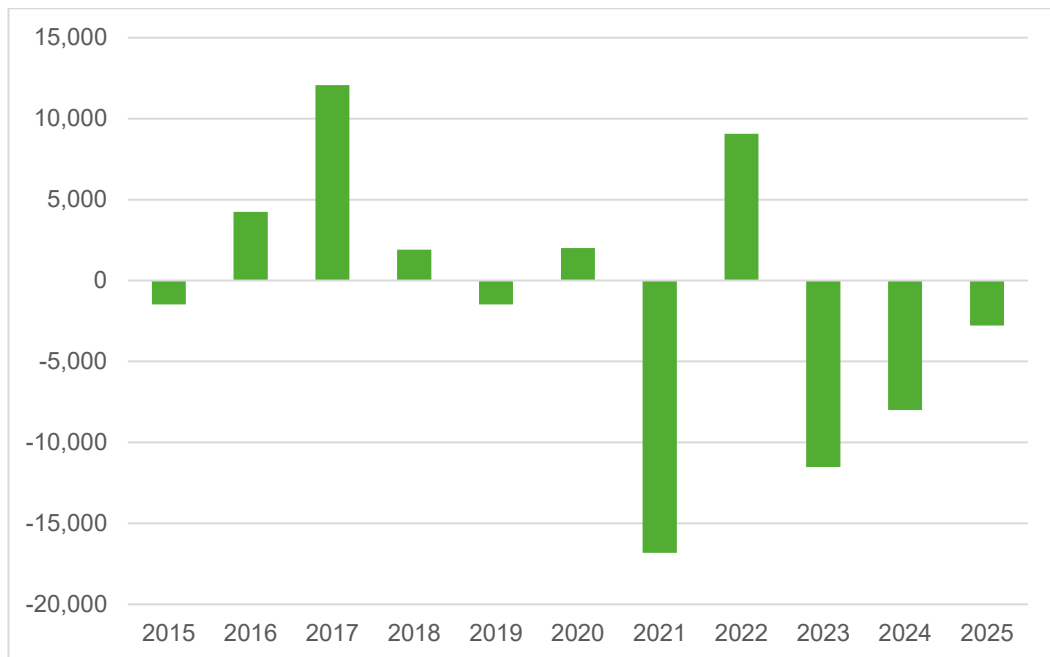
Net Absorption Trend

- 6.31 A third supply-based calculation looks at past take-up of space occupied (rather than floorspace delivered) measured by net absorption using CoStar data. This is the balance between the amount of space moved into and moved out of (i.e. Net absorption = Move-ins – Move outs) equating to the change in occupied office space.

6.32 This differs from the completions-based projections in that it predicts future floorspace requirements directly based on demand for floorspace rather than past completions of floorspace (which is a proxy for floorspace demand).

6.33 The figure below shows the net absorption of office floorspace across South Warwickshire over the past decade. Overall, net absorption has been negatively impacted by the pandemic with limited take-up from 2021 onwards, despite positive net absorption in 2022. However, even prior to the pandemic, net absorption of office space was relatively weak.

Figure 6.6 South Warwickshire Office Net Absorption



Source: CoStar 2025

6.34 The table below shows the average rate of take-up over the 2015-25 period for office by District, overall net absorption has been negative across both areas over both the past 5 and 10-year period.

Table 6.5 Average Net Absorption 2015-25 (sqm)

Time Period	Avg. 2015-25	Avg. 2020-25
Warwick	-813	-3,024
Stratford-on-Avon	-349	-1,650

Source: IcenI analysis of CoStar data

- 6.35 The historic net absorption rates presented in the table above have then been projected forward to estimate employment floorspace requirements for 2021-50. The estimated floorspace requirements below also show the employment floorspace requirements after considering a margin for flexibility.

Table 6.6 Employment Floorspace Requirement by Net Absorption Projection, 2021-50 (sq.m)

	Net Absorption – 10 yr	Net Absorption – 5 yr
Warwick	-23,600	-87,700
Stratford-on-Avon	-10,100	-47,900
Margin for Flexibility (equal to 2 years average gross completions)		
Warwick	-20,500	-84,700
Stratford-on-Avon	-7,800	-45,500

Source: IcenI Projects based on CoStar Data

Summary of Office Needs

- 6.36 The table below draws together the office floorspace needs modelling. The modelled office need for Warwick ranges from -84,700 sq.m to 93,900 sq.m; and in Stratford-on-Avon ranges from -45,500 sq.m to 73,200 sq.m.

Table 6.7 Summary of Office Needs Modelling 2021-50 sq.m

	Warwick	Stratford-on-Avon	South Warwickshire Total
Labour Demand	32,000	73,200	105,200
Gross Completions – 10 yr	93,900	36,000	129,900
Gross Completions – 5yr	91,400	52,400	143,800
Net Completions – 10yr	3,800	-38,500	-34,700
Net Completions – 10yr incl. replacement	21,800	36,100	57,900
Net Completions 5yr incl. replacement	47,300	-23,600	23,700
Net Completions – 5yr	29,300	21,300	50,600
Net Absorption – 10 yr	-20,500	-7,800	-28,300
Net Absorption – 5 yr	-84,700	-45,500	-130,200

Source: Icen Projects / Experian / Local Authority Monitoring / CoStar

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- 6.37 The 2022 HEDNA recommended that for the 2021-50 period, Warwick planned for 79,000 sq.m / 15.8ha of offices and Stratford-on-Avon planned for 36,000 sq.m / 7.2ha of office development, a total of 115,000 sq.m or 23ha across South Warwickshire. The revised labour demand modelling points now to a slightly lower need (105,200 sq.m), influenced by the modelling approach which takes account of the impact of changing working patterns on office floorspace requirements.
- 6.38 However the commercial evidence points to a considerably lower level of demand, with for instance the net absorption analysis showing a negative requirement for office floorspace based on both 5 and 10 year trends.
- 6.39 Bringing the analysis together, the labour demand and gross completions models forecast an office requirement of over 100,000 sq.m over the plan period. In reality, taking account of market signals of rising vacancy, declining office rents and the lack of viability of speculative new build development (at least in the short-term), these are not considered realistic scenarios to plan for as they are unlikely to be delivered.
- 6.40 Nonetheless, it is sensible to provide for some potential growth in office-focused activities given the length of the plan period and in order to support potential for changing market conditions over time. This recognises the potential growth in office-based employment shown in the economic forecasts, including in the gaming, technology and professional service sector. The models implying a negative office floorspace requirement can therefore also be discounted.
- 6.41 The net completions models with the replacement sensitivity imply a South Warwickshire requirement of 23,700 to 57,900 sq.m. It is recommended that the upper bound of this is planned for, derived from the 10-year completions trend, due to the increased impact that the recent pandemic had on the short-term 5 year trend.

- 6.42 Overall, **South Warwickshire should plan for 57,900 sq.m of office floorspace** over the plan period to 2050. Using a plot ratio of 0.5, this is equivalent to 11.6ha.
- 6.43 The district split implied by the modelling does not align with market sentiment, which suggests that there is limited market demand in Stratford-on-Avon, with the stronger potential focused for office floorspace provision focused on Leamington Spa and Warwick.
- 6.44 Based on the current split of office stock, 68% of office stock is located within Warwick, with the remaining 32% within Stratford-on-Avon. Based on this apportionment, the office requirement for the 2021-50 period between the two authorities is 39,400 sq.m / 7.9ha in Warwick and 18,500 sq.m / 3.7ha in Stratford-on-Avon.

Table 6.8 Conclusions on Office Floorspace Needs, 2021-50

	Floorspace (sq.m)	Land (Ha)
Stratford-on-Avon	18,500	3.7
Warwick	39,400	7.9
South Warwickshire	57,900	11.6

Policy Implications: Office & R&D Needs

Drawing together the evidence we identify a gross need for 57,900 sq.m of office floorspace over the 2021-50 plan period across South Warwickshire. This is notionally apportioned between the two authorities with 39,500 sq.m in Warwick and 18,500 sq.m in Stratford-on-Avon. This provides an appropriate basis for monitoring floorspace development.

As set out in Section 3, given the challenging viability of new-build office development, we recommend that policies in the Plan support the conversion of existing space to provide modern office floorspace, with some potential for the conversion of both retail space in town centres and agricultural buildings in rural areas. Public funding support may be required to support office floorspace development in some instances.

Taking account of the challenging viability position, we recommend that the Councils exercise some caution in allocated specifically for E(g)(i)

and E(g)(ii) use, particularly outside of town centres, and consider that broader employment allocations may support flexibility to bring forwards office space as well as other forms of employment development.

Industrial Need – Non-Strategic Sites

- 6.45 Drawing on the findings of the Coventry & Warwickshire Alignment Paper 2024, the industrial needs for non-strategic sites (i.e. the local need) for the 2021-50 period have been summarised below.
- 6.46 **In Warwick there is an industrial need for non-strategic sites of 113.3ha and in Stratford-on-Avon there is a need of 196.2ha over the 2021-50 period.** This consists of local industrial need, derived from a completions trend for units <9,300 sq.m, and a big box (+9,300 sqm) need on non-strategic sites.

Table 6.9 Requirement for Industrial Land on Non-Strategic Sites (Ha) 2021-50

	Warwick	Stratford-on-Avon
Local Industrial Need	97.3	169.6
Big Box (Non-Strategic)	16.0	26.6
Industrial Requirement – Non-Strategic Sites	113.3	196.2

Source: C&W Alignment Paper (2024)/ Icenic Calculations

Strategic Sites Need

- 6.47 The WMSESS addresses the need for ‘strategic sites’ rather than needs for employment units of a strategic scale. The strategic sites need included provision for both B2 and B8 development on such sites.

-
- 6.48 It identified 9 areas of opportunity for future strategic sites of which Area 7 Coventry & Rugby, Area 8 A46 and M40 and Area 9 Redditch and Bromsgrove, fall within South Warwickshire.
- 6.49 Based on market ranking, pipeline supply and other factors the **residual need** for additional strategic sites was apportioned across the opportunity areas. These conclusions took into account extant commitments for strategic sites at the time of the WMSESS's preparation, which are set out in Appendix 3 WMSESS.
- 6.50 Drawing together the position regarding the strategic sites need for the purpose of the South Warwickshire Local Plan, it is helpful to draw together the position in terms of existing commitments with the residual requirement figures to derive a potential gross 'strategic sites' need.
- 6.51 To derive a gross opportunity area need, the committed strategic supply identified within WMSESS (as of April 2022) must be added onto the residual need. This is considered in turn for each opportunity area below.

Area 7: Coventry & Rugby

- 6.52 Area 7 covers Coventry, Rugby and the north of Warwick District. The table below sets out the residual need for Area 7.
- 6.53 In the November 2025 Alignment Paper Addendum, the supply position relating to Coventry Gateway South was revised to 90 ha to reflect that part of the allocation is for a Country Park. As a result the paper concluded that an additional B8/Mixed 50ha site should be apportioned to Area 7, leading to an updated residual need for Area 7, as set out below.

Table 6.10 WMSESS Indicative Site Need – Area 7

Opportunity Area	Type of Site	Indicative additional strategic site requirement at B8/mixed c.50ha; B1/B2 dedicated c.25ha	Indicative land need 2022-45
Area 7: Coventry & Rugby	B8/Mixed	2-3	100-150
	B2	1-2	25-50
Residual Total			125-200

Source: Icen Analysis of WMSESS 2024

- 6.54 The supply within Area 7 set out in WMSESS as of April 2022 is summarised in the table below and indicates a total strategic sites supply of 406ha.

Table 6.11 Area 7 WMSESS Strategic Sites Supply, April 2022

Site	Local Authority	Site Size (Ha)
Coventry Gateway South	Warwick	87.4*
Coventry Airport	Warwick	125
Tritax Symmetry Park Rugby	Rugby	46.2
Prospero Ansty	Rugby	49.4
Prologis Park, Ryton	Rugby	16.7
Rugby Radio Station	Rugby	16
Coton Park East	Rugby	8.7
Baginton Fields	Coventry	25
Faultands	Nuneaton & Bedworth	26
Prologis Extension	Nuneaton & Bedworth	5.9
Total		406

*adjusted as per Alignment Paper Addendum 2025

Source: WMSESS 2024, Appendix 3

6.55 Totalling the supply position to the residual requirement indicates a gross Area 7 need of **531 to 606ha** for the 2022-45 period.

Area 8: A46 and M40

6.56 The indicative need for Area 8 is shown in the table below. Based on site need recommendations, **there is a need for between 75-125 ha** of land on additional new strategic sites in South Warwickshire.

Table 6.12 WMSESS Indicative Site Need – Area 8

Opportunity Area	Type of Site	Indicative additional strategic site requirement at B8/mixed c.50ha; B1/B2 dedicated c.25ha	Indicative land need 2022-45
Area 8: A46 / M40 Warwick	B8/Mixed	1-2	50-100
	B2	1	25
Total			75-125

Source: Icen Analysis of WMSESS 2024

6.57 The residual need conclusions took account of the 100ha JLR Allocation at Gaydon Lighthorne Heath (B2 use). It should be noted that the WMSESS report strongly recommends that the upper bound is planned for. Given that the WMSESS provides a requirement to 2045 and the Plan looks to 2050, planning for the upper bound of 125ha for the Area 8 geography within the South Warwickshire Local Plan is recommended.

6.58 **This indicates a gross strategic sites requirement for Area 8 of 225ha.**

Area 9: Redditch and Bromsgrove

6.59 Icen would additionally note that the WMSESS does identify a need in Area 9 (M42/M5/M435 Redditch and Bromsgrove). Whilst this AoO lies principally across Redditch and Bromsgrove, **there could be potential**

for strategic sites close to M42 Junction 3 within Stratford-on-Avon District (such as those along the A435 Corridor) to contribute to the needs within Area 9. This will need to be considered as part of the South Warwickshire Plan.

6.60 The need identified for this AoO is for 1-2 sites for B8/Mixed use; and 0-1 sites for B2.

Table 6.13 WMSESS Indicative Site Need – Area 9

Opportunity Area	Type of Site	Indicative additional strategic site requirement at B8/mixed c.50ha; B1/B2 dedicated c.25ha	Indicative land need 2022-45
Area 9: M42 / M5 / A435 Redditch & Bromsgrove	B8/Mixed	1-2	50-100
	B2	0-1	0-25
Total			50-125

6.61 The WMSESS identifies 13ha of supply in Area 9, the residual commitment at Redditch Gateway. **This indicates a gross Area 9 requirement of 63 to 138ha.**

Needs Summary

6.62 The table below summarises the non-strategic employment needs for Warwick and Stratford-on-Avon.

Table 6.14 Summary of Needs on Non-Strategic Sites for 2021-50 (Ha)

	Office	Industrial – Non-Strategic Sites	Total (rounded)
Warwick	7.9	113.3	121.2
Stratford on Avon	3.7	196.2	199.9
South Warwickshire Total	11.6	309.5	321.1

Source: Icen analysis

- 6.63 The table below summarises the gross strategic sites need for the three Opportunity Areas that fall within South Warwickshire. This is **not** a South Warwickshire strategic sites requirement and the quantum to be met in South Warwickshire is considered in Section 6.

Table 6.15 Summary of Gross Strategic Sites Need

Opportunity Area	Strategic Sites Need (Ha)
Area 7	531 – 606
Area 8	225
Area 9	63 – 138
Total	819 - 969

Source: Icen analysis

7. Current Employment Land Supply

- 7.0 This section provides the latest employment land supply position, as of April 2025, using the latest available monitoring data for the 2024/25 monitoring period.

Completions

- 7.1 The Plan period starts in 2021, therefore completions from the monitoring year 2021/22 to 2024/25 can be netted off from the forecasted need.
- 7.2 Employment supply has been monitored in floorspace terms and then converted to land using a plot ratio of 0.5 for office and 0.4 for non-strategic industrial.
- 7.3 Monitoring in floorspace terms aligns with employment needs modelling is provided in floorspace terms and then converted to hectares using the above plot ratios. This avoids distortions created by varying plot ratios which are impacted by site specific issues such as landscaping and layout. Going forwards, authorities should continue to monitoring employment deliveries in floorspace terms.

Completions on Non-Strategic Sites

- 7.4 The tables below that over the 2021/22 to 2024/25 period, the equivalent of 2.5ha of office development and 8.1ha of industrial supply on non-strategic sites has been completed in Warwick and 0.9ha of office and 10ha of industrial development on non-strategic sites has been completed in Stratford-on-Avon.

Table 7.1 Warwick Completions by Use Class

	Office	Industrial on non-strategic sites
2021/22	1,808	3,187
2022/23	4,039	9,339
2023/24	5,996	20,056
2024/25	530	525
Total	12,373	32,582
Total (Ha)*	2.5	8.1

*based on plot ratio 0.5 for office, 0.4 for local industrial

Source: Icen Analysis of Local Authority Monitoring

Table 7.2 Stratford-on-Avon Completions by Use Class

	Office	Industrial on non-strategic sites
2021/22	513	8,125
2022/23	995	3,312
2023/24	2,085	12,715
2024/25	810	15,692
Total	4,403	39,844
Total (Ha)*	0.9	10.0

*based on plot ratio 0.5 for office, 0.4 for industrial

Source: Icen Analysis of Local Authority Monitoring

Completions on Strategic Sites

7.5 The table below summarises completions on strategic sites by Opportunity Area.

Table 7.3 Strategic Completions (2022/23-2024/25)

Site	Floorspace (sq.m)	Land (Ha) @ 0.35 plot ratio	Completion Year	OA
Plot 3A, Gateway South	54,544	15.6	2024/25	Area 7
Redditch Gateway (Winyates Green Triangle)	42,250	13.0	2023/24	Area 9

Source: Icen Analysis of Local Authority Monitoring

Extant Allocations

7.6 Next we have sought to consider what supply might be ‘rolled forwards’ from extant allocations. Paragraph 127 in the 2024 NPPF sets out that planning policies need to reflect changes in the demand for land and should be informed by regular reviews of both the land allocated for development in plans and land availability. It requires planning authorities to consider whether there is a reasonable prospect of an application coming forwards for the uses identified within a plan. Icen has worked with the Councils to consider whether existing employment allocations should be retained on this basis.

7.7 The table below summarises the extant allocations within South Warwickshire and provides a summary of the status of the sites. These extant allocations have been assessed within the 2024 Employment Land Study Existing Sites Pro-Forma¹⁰.

¹⁰

<https://www.southwarwickshire.org.uk/doc/213218/name/Employment%20Land%20Study%20Existing%20Sites%20Pro%20forma%20Appendix%202.pdf>

7.8 However the review has identified a number of allocations which we recommend are not retained as they are not likely to see employment development. These have therefore been excluded from the employment supply position. They are as follows:

- Village Centre, Lighthorne Heath – the Stratford-on-Avon Core Strategy sought delivery of one main village centre as part of proposals at Gaydon/Lighthorne Heath through Policy GLH and envisaged that this would include shops, services, a community hub and primary school. This allocation is unlikely to yield any E(g) development given office viability challenges and is not therefore included in the supply position for employment land moving forwards;
- Canal Regeneration Quarter Zone - the Stratford-on-Avon Core Strategy supported mixed-use development in this area, to include approx.. 650 dwellings and 9,000 sq.m of B1 employment development. However the area has a mix of land ownerships and has been slow to come forwards. This allocation is considered unlikely to yield any E(g) development given office viability challenges and its focus should therefore be on residential delivery. It should not therefore be included as part of the employment land supply.

7.9 It is of note that there is limited supply coming forward in the short-term, with only the employment allocation at Alcester, which is under construction, and part of the Stratford 46 scheme expected to be delivered in the short-term.

7.10 Many of the extant allocations have achieved outline planning consent, but have yet to be developed. This is primarily attributed to economic factors which have inhibited development such as high interest rates, high build costs and economic uncertainty. It is expected that these sites will come forward within the medium term as market conditions and viability improves.

7.11 Overall, the extant allocations are expected to contribute 133.3ha to Stratford-on-Avon employment land supply, of which 100ha contributes towards the Area 8 gross strategic need.

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- 7.12 In Warwick, this is a supply of 107.7ha, of which 88.1ha is considered to contributed towards the Area 7 gross need.
- 7.13 It is expected that all supply will contribute towards either the local or strategic industrial requirement, as it is unlikely that new build office development will be delivered within the current market conditions.

Table 7.4 Review of Extant Allocations

Site	Site Size (Ha)	Contribution to Supply	Delivery Timescales	Notes
Stratford-on-Avon				
Land North Of Arden Forest Industrial Estate, Arden Road, Alcester	7.6 (4.1 remaining)	4.1	Short-term 2025-30	First Phases delivered (3.5ha). Phase 2 plots (4-9) are for sale on a freehold build to suit basis. Infrastructure in place. Next phase of deliver is assumed to come forwards pre-2030.
Village Centre, Upper Lighthorne New Settlement	0.1	0	N/A	Office development unlikely to come forward. Sites should not be included in employment land supply.
Long Marston Airfield, Campden Road, Lower Quinton	8	8	N/A	Draft allocation (Reg 18) indicated that the employment component was not being carried forward. However the position has since changed and the New Settlement Masterplan proposes to retain the employment allocation.

Land West of Banbury Road, Southam	1.6	1.6	Medium term 2030- 35	Employment component of allocation is not started. Outline permission granted (17/03753/OUT) – now expired. Considered developable.
Canal Quarter Regeneration Zone, Stratford-upon-Avon	2.0	0	N/A	Unlikely to yield additional employment development.

South of Alcester Road, Stratford-upon-Avon (Stratford 46)	9.6	9.6	Short to Medium term 2025-35	Hybrid application - full planning for access and engineering operations, outline for B uses, retail and car showrooms. Reserved matters and conditions being discharged throughout 2024/2025. IM Properties have commenced construction on site – with a start on site made in Summer 2025, and construction of the first buildings due from late 2026. Marketing for Stratford 46 Business Park underway. advertising design and build opportunities. Deliverable site.
Atherstone Airfield, east of Shipston Road, Atherstone-on-Stour	10.0	10.0	Medium term 2030+	Restriction on Canal Quarter Regeneration Zone relocation has prevented development. Considered suitable and deliverable for employment development with revised, more flexible policy.
Jaguar Land Rover (JLR)	100	100	N/A	CS allocation restricts development to expansion of JLR to meet its specific business needs. However site not controlled by JLR. Considered suitable for employment development with potential to support wider strategic (manufacturing-focused) development.
Aston Martin Lagonda (AML)	4.5	0	N/A	Specifically for AML use. Site forms an extension of existing AML sites and will not contribute to wider market requirements. Retention of allocation should be further discussed with AML.
Stratford Total		133.3¹¹		

¹¹ Of which 100 ha is considered to contribute to the Area 8 strategic sites' supply (JLR and AML allocations at Gaydon Lighthorne Heath)

Warwick

DS16 – Sub-Regional Employment Site - Gateway South	87.4 (71.8ha remaining)	71.8	Short-term	Site is under construction with initial phases of development completed (Plot 3A completed 2024/25). Deliverable site which should be retained in employment supply.
DS16 – Sub-Regional Employment Site – Whitley South	21.0	16.3	Short/ medium-term	Site has outline planning consent with infrastructure to support development in place. Forms part of West Midlands IZ. Application for detailed consent for western portion of site submitted in June 2025 (W/25/0816). Deliverable site can be expected to be delivered in short/medium-term.
E1 - Land at Thickthorn, Kenilworth	7.9	7.9	Short & medium term – 2025-35	Hybrid planning permission ¹² for mixed use site containing 7.9ha of Class E / B2 granted in Dec 2021. RM application for commercial development of 6 B2 units totalling 22,0000 sq.m submitted in November 2024 and under consideration (W/24/1536) together with applications for discharge of conditions. Developer is Barwood Land Securities. Site well located adjoining A46 and considered deliverable.

¹² W/20/2020

E2 - Land at Stratford Road, Leamington Spa	11.7	11.7	Medium term – 2030-35	Outline permission ¹³ on part of the allocation for E(g)/B2/B8 development. Indicative layout shows three units ranging from 5,140 to 16,667 sq.m. No further progress. Balance of the site (3.14 ha) has outstanding allocation. Freehold for whole site was advertised as for sale for I&L development in 2025. Attractive site for I&L development. Likely to come forward as part of wider development including adjoining land in short/medium-term.
Warwick Total		107.7¹⁴		

Source: Icenl analysis

¹³ W/22/1077, granted July 2024

¹⁴ Of which 88.1 ha considered to contribute to Area 7 strategic sites' supply (DS16 Sub-Regional Employment Site)

Commitments on Non-Allocated Sites

- 7.14 The table below summarises the commitments position in Warwick by use class, as of April 2025. The full list of commitments can be found in **Appendix 2**. This excludes commitments on allocated sites which are considered in the previous section.
- 7.15 There is 2,800 sq.m of committed office floorspace. This excludes the supply at Abbey Park, of which 22.6ha was previously included in the 2024 Study. The previously proposals for 14,000 sq.m of office floorspace did not come forward and a new application for E(g)(iii) space is pending determination (W/25/1072).
- 7.16 There is 17,700 sq.m of committed industrial floorspace, equating to 4.4ha of supply. Notable permissions include Plot 1001 at Tournament Fields¹⁵ (7,920 sq.m B8) and the extension of the Thwaites factory¹⁶ (5,007 sq.m B2).

Table 7.5 Warwick Commitments by Use Class April 2025

	Office	Industrial on Non-Strategic Sites
Total (sq.m)	2,778	17,651
Total (Ha)*	0.6	4.4

*based on plot ratio 0.5 for office, 0.4 for local industrial

Source: Icen Analysis of Local Authority Monitoring

¹⁵ W/24/1031

¹⁶ W/21/1250

7.17 In Stratford-on-Avon there is 2,400 sq.m of committed office floorspace and 25,500 sq.m of committed industrial floorspace. The full list of commitments can be found in **Appendix 3**.

7.18 Analysis of unit sizes in Appendix 3 reveals that a majority of supply provides smaller units (<2,500 sq.m) and there is a limited provision of mid-box and no commitments providing units over 5,000 sq.m. The following schemes providing units over 2,500 sq.m:

- Drayton Manor, Alcester Road – 4,633 sq.m E(g)/B2/B8 unit
- Newey Young Plants – 4,333 sq.m B8 unit
- Unit 1 Kineton Road, Southam – demolition and replacement of existing unit – 3,045 sq.m

Table 7.6 Stratford-on-Avon Commitments by Use Class April 2025

	Office	Industrial on Non-Strategic Sites
Total (sq.m)	2,398	25,546
Total (Ha)*	0.5	6.4

*based on plot ratio 0.5 for office, 0.4 for local industrial

Source: Icen Analysis of Local Authority Monitoring

Strategic Site Commitments

7.19 The Coventry Airport site is the only strategic site commitment on an unallocated site. The 125ha site has outline permission (W/21/1370) for the development of a battery manufacturing facility, totalling 529,650 sq.m of B2 floorspace.

7.20 This contributes 125ha towards the Area 7 gross strategic sites need.

Existing Employment Sites

- 7.21 Site assessments were carried out on existing employment sites to identify opportunities for further development or intensification. The site assessments can be found in the Existing Sites Pro-Formas, Appendix 2¹⁷ of the 2024 Employment Land Study.
- 7.22 Three plots were identified (detailed in the table below) and could contribute to meeting future employment need. All of these sites are in Stratford-on-Avon District; with no additional supply on sites in Warwick District identified.
- 7.23 No existing sites were recommended to release their protection and therefore no re-provision needs to be made for planned losses. A summary of the recommendations of the existing employment sites assessment can be found in Appendix 4 of this report.

Table 7.7 Vacant Plots in Existing Sites

Site	Local Authority	Vacant Land
Tilemans Lane, Shipton-on-Stour	Stratford-on-Avon	0.7 ¹⁸
Bird Industrial Estate	Stratford-on-Avon	0.05
Shottery Brook Business Park	Stratford-on-Avon	0.3
Total		1.1 (rounded)

Source: Icen Analysis

¹⁷

<https://www.southwarwickshire.org.uk/doc/213218/name/Employment%20Land%20Study%20Existing%20Sites%20Pro%20forma%20Appendix%202.pdf>

¹⁸ This site has planning consent (24.00154/FUL) for 8 commercial units, however permission falls within 2025/26 monitoring year which is not included at this stage

Supply Summary

- 7.24 The tables below summarise the findings of the chapter. In Warwick, there is 3.1 ha of office land available. There is a non-strategic industrial provision of 32.1ha. Stratford-on-Avon has an office supply of 1.4 ha and a non-strategic industrial supply of 50.8ha.
- 7.25 Consideration of supply arising from Major Investment Sites, such as Stoneleigh Park, is made within the section 9.

Table 7.8 Warwick Supply Summary

	Office	Industrial on non-strategic sites	Strategic sites
Completions	2.5	8.1	15.6
Allocations	-	19.6	88.1
Commitments (non-allocated sites)	0.6	4.3	125
Vacant plots	-	-	-
Total	3.1	32.1	228.7

Source: Icen analysis

Table 7.9 Stratford-on-Avon Supply Summary

	Office	Industrial on non-strategic sites	Strategic sites
Completions (non-allocated sites)	0.9	10.0	13
Allocations	-	33.3	100
Commitments (non-allocated sites)	0.5	6.4	-
Vacant plots	-	1.1	
Total	1.4	50.8	113

Source: Icen analysis

7.26 The table below summarises the South Warwickshire employment land supply position.

Table 7.10 South Warwickshire Employment Land Supply

	Office	Industrial on non-strategic sites	Strategic sites
Total Supply	4.5	82.9	341.7

Source: Icen analysis

8. Supply-Demand Balance

- 8.0 In this section we seek to bring the evidence together to identify the supply-demand balance for non-strategic and strategic employment land.

Supply Demand Balance

- 8.1 Drawing on analysis of previous sections we consider the employment land position against the identified needs. We consider the position in terms of strategic and non-strategic sites.

Non-Strategic Sites

- 8.2 The supply-demand balance indicates a shortfall of 4.8ha of office and 81.2 ha of local industrial land in Warwick. In Stratford-on-Avon there is an office shortfall of 2.3ha and a local industrial shortfall of 145.4ha.
- 8.3 Icenii however consider for the reasons explained that standalone allocations for office floorspace should be avoided; and it would therefore be appropriate to consider the aggregated residual requirement for non-strategic sites – which is for 86 ha in Warwick District and 147.7 ha in Stratford-on-Avon – with therefore **a total need to allocate 233.7 ha of land to meet needs on non-strategic sites over the plan period to 2050.**

Table 8.1 Warwick Supply-Demand Balance (Ha) – Non-Strategic Sites

	Office	Industrial	Total
Need 2021-50	7.9	113.3	121.2
Supply	3.1	32.1	35.2
Residual Need 2021-50	4.8	81.2	86.0

Source: Icen analysis

Table 8.2 Stratford-on-Avon Supply-Demand Balance (Ha) – Non-Strategic Sites

	Office	Industrial	Total
Need 2021-50	3.7	196.2	199.9
Supply	1.4	50.8	52.2
Residual Need 2021-50	2.3	145.4	147.7

Source: Icen analysis

- 8.4 Meeting the need identified will support industrial occupiers who face current limited availability of space for expansion – providing move on space for existing businesses, as well as opportunities for businesses to move to more modern commercial floorspace.
- 8.5 Alongside provision of employment land for new development, it will be important that existing employment sites are safeguarded from loss to other uses – in particular to reflect the role which they play in providing affordable space for smaller businesses.

Strategic Sites: Area 7 – Rugby & Coventry

- 8.6 As set out in section 4, the gross Area 7 need is 513 to 606ha, setting out the need to be met within Coventry, Rugby and north Warwick.

8.7 The Rugby Development Needs Topic Paper 2025¹⁹ sets out an updated strategic employment sites supply position for Rugby, capturing completions for the 2022/23 to 2024/25 period and commitments as over April 2025. The supply position is set out in the table below and indicates that there is 229ha of completed / committed strategic sites supply in arising from Rugby, meeting the Area 7 need.

Table 8.3 Rugby Strategic Sites Completions and Commitments 2022-25

	Completions 2022/23- 2024/25	Committed / Residual
Tritax Symmetry, South West Rugby	39.36	
Prospero Ansty	37.96	6.27
Prologis Park, Ryton	13.65	
Padge Hall Farm (R21/0551)		63.84
Coton Park		8.7
Houlton remaining land		3.75
Ansty Park (Land of Vigen Way)		1.04
Crowner Fields Farm and Home Farm		78.57
Land at Padge Hall Farm (R24/0257)		0.16
Subtotal	91.35	137.38
Total	228.7	

Source: Rugby Development Needs Topic Paper, December 2025

¹⁹ <https://www.rugby.gov.uk/documents/20124/62314733/Development+Needs+Topic+Paper.pdf/48eab135-87d7-5878-02f3-c3dcab15919b?t=1765804559470>

- 8.8 Warwick, Nuneaton and Coventry then contribute a further 283 ha to the Area 7 supply position. Site sizes have been updated from the WMSESS 2024 position to reflect committed / allocated areas.
- 8.9 Whitley South, not previously included due to its R&D permission, is now included within the Area 7 supply, reflecting the intention for the site to be brought forward for industrial use (pending application).

	District	Completions 2022/23- 2024/25	Committed / Allocated / Residual
Coventry Airport	Warwick		125
Gateway South	Warwick	15.6	71.8
Whitley South	Warwick		16.3
Faultlands	Nuneaton & Bedworth	26	
Prologis Extension	Nuneaton & Bedworth		3.58
Baginton Fields	Coventry		25
Subtotal		41.6	241.7
Total		283.3	

Source: IcenI analysis of WMSESS 2024

- 8.10 The April 2025 Area 7 strategic sites supply totals 512ha. Against the gross requirement of 531 to 606ha results in a residual need of 19 to 94ha.
- 8.11 Rugby Borough’s Pre-Submission Local Plan makes for provision for 540,000 sq.m (equivalent to 149ha) of employment development through new allocations. This is to meet industrial need on both small and large sites. The topic paper confirms that the new allocations are sufficient to meet Rugby’s non-strategic need, Area 7’s residual

strategic site need and contribute an addition to contributing 2.5ha towards Coventry's unmet need.

Table 8.4 Area 7 – Supply-Demand Balance (Ha)

	Area 7
Gross Need	531 - 606
Supply (Completions and Commitments)	512
Residual Subtotal	19 - 94
Rugby Local Plan Submission – Employment Allocations*	149

*of which accommodate small and large site need

Source: Icen analysis

- 8.12 At the time of writing there is no further provision to be made within Warwick beyond the committed and allocated sites, assuming the new allocations within Rugby's submitted Local Plan are carried forward into the adopted Plan. It should be noted that the supply position is subject to potential change following the examination of Coventry and Rugby's Local Plans.

Strategic Sites: Area 8 – M40 and A46

- 8.13 The table below indicates that for Area 8, after accounting for existing supply, there is a residual need of 125ha. This is to be met wholly within South Warwickshire through new employment allocations.

Table 8.5 Area 8 – Supply-Demand Balance (Ha)

	Area 7
Gross Need	225
JLR Allocation	100
Residual Area 8 Need	125

Source: Icen analysis

Strategic Sites Need: Area 9 Redditch & Bromsgrove

- 8.14 Within Area 9 there is a residual requirement of 50 to 125ha. This is not a requirement to be met wholly within South Warwickshire; the opportunity area sits across a number of junctions within Redditch, Bromsgrove and Stratford-on-Avon.
- 8.15 Both Redditch and Bromsgrove Districts are within the early stages of plan-making with both authorities awaiting detailed plan-making guidance, with the intention of submitting their plans under the new system.
- 8.16 There is a need for cross-boundary liaison between Stratford-on-Avon, Redditch and Bromsgrove to identify sites that will meet this residual requirement.
- 8.17 The South Warwickshire Plan should look to test a potential contribution to meeting the need at M42 J3, the only junction within the opportunity area that falls within Stratford-on-Avon District, however the residual requirement should not be met in full within South Warwickshire.

Table 8.6 Area 9 – Supply-Demand Balance (Ha)

	Area 7
Gross Need	63 – 138
Redditch Gateway (residual)	13
Residual Area 9 Need	50 - 125

Source: Icen analysis

9. Advice on Potential Growth Locations

Meeting the Strategic Sites Need

Area 7

- 9.0 As shown above, taking account of existing supply and commitments and the supply coming forwards in Rugby Borough's Local Plan (Reg19) can be expected to meet the needs of Area 7 together with the sites identified below.
- 9.1 The evidence indicates existing sub-regional site allocation (including Gateway South and Whitley South) should be retained to ensure the delivery of remaining phases. This is considered a strategic site.
- 9.2 The allocation of Coventry Airport is recommended (subject to consideration of other parts of the evidence, including the Green Belt assessment and transport evidence), with policy supporting advanced manufacturing more broadly rather than limited use to battery production. Logistics uses should be limited and 'XL' units (+250,000 sq.ft) should only be permitted where ancillary to manufacturing or R&D activities.
- 9.3 If these sites are taken forwards, no further allocations would therefore be needed in this Opportunity Area within South Warwickshire.

Area 8: M40 / A46

- 9.4 The South Warwickshire Local Plan should meet the Area 8 strategic sites residual need of 125ha in full, noting that indicative requirement for one B2 sites and 1-2 mixed/B8 sites. Appropriate locations in Area 8 would relate well to the M40 and/or A46 Corridor.
- 9.5 The 100ha allocation at JLR, which is already included in the supply, should be retained but the Plan's policies should support wider market

for strategic manufacturing and B8 logistics use but should retain a focus on advanced manufacturing. This could be achieved by requiring a marketing strategy for the site targeting advanced manufacturing and engineering and associated supply chain and distribution activities and by limiting the potential for B8 floorspace > 9,300 sq.m to 50% of total floorspace. This approach seeks to balance the role the site can play in supporting the strong focus of manufacturing activity at Gaydon whilst contributing to the supply of land for strategic B8 in the short/ medium-term for Area 8. This site remains an important component of the existing strategic sites supply within Area 8 and is starting to come forward, with a pending application on 11.7ha of the site (25/01765/FUL).

9.6 The preferred options consultation identifies a number of land parcels within SG13 (Gaydon) for development. The 29.5ha parcel to the south of M40 J12 recently received a refusal (23/01054/OUT) for E(g)/B2/B8 development on landscape grounds, with an appeal to consider the application forthcoming.

9.7 The preferred options consultation set out two potential strategic site options:

- Red House Farm, South of Leamington – 121ha
- Wedgnock Park Farm – 141ha

9.8 Both sites are well located to the strategic road network and would contribute towards the mixed / B8 requirement.

9.9 The proposed site area for Wedgnock Park Farm has been reduced to 71ha since the Preferred Options consultation – if this site is progressed an additional site could potentially be required. Alternatively, Red House Farm alone could meet the residual strategic sites requirement alone.

9.10 As discussed above, there is also case for considering potential additional strategic site allocations at M42 J3, to contribute towards the Area 9 residual need. Land East of Alcester Road, SE of J3 M42 (Site

362), assessed with the Call for Site Pro-Forma Update, is in a suitable location to contribute towards the Area 9 strategic sites requirement – but its allocation would need to consider and take account of the wider evidence base.

Meeting the Non-Strategic Site Need

9.11 The emerging strategy Draft Policy Direction 14 indicates that Major Investment Sites and Strategic Growth Locations will be the main focus of new employment development within the Plan Period, these are considered in turn below where not already covered above under strategic sites.

Long Marston Airfield and Rail Innovation Centre MIS.2 / MIS.3

9.12 Whilst Draft Policy Direction 14 indicates that the Long Marston Airfield employment allocation will be released, the position on Long Marston New Settlement has since changed. The New Settlement Masterplan for 10,000 homes is proposing to retain the existing employment allocation.

9.13 Employment provision within the potential Long Marston new settlement, should also considered employment space within the local centre, such as office and co-working space.

9.14 As outlined in the draft policy direction the Long Marston Rail Innovation Centre site will be safeguarded for rail-based employment and R&D and opportunities for intensification should be explored. The site is not identified as a strategic growth location; but development on this site and the existing employment site at Meon Vale can help to support employment generation in this broad area.

Stoneleigh Park MIS.5 / SG02

-
- 9.15 Stoneleigh Park is a key location for rural and agricultural occupiers and currently operates at a low-density due to its layout. Its previous masterplan permission which restricted development of office and R&D use did not come forward.
- 9.16 The draft policy direction highlights that the location has the potential to benefit from improved connectivity to Kenilworth and connectivity to the improved A46 Stoneleigh Junction.
- 9.17 Intensification of the site is being explored through updated masterplanning, however proposed use classes are unknown. Further floorspace delivered on site would contribute additionally to Warwick's local supply. It is expected that intensification of Stoneleigh Park will contribute around 5ha (subject to further analysis).
- 9.18 A further two sites have been identified within SG02 – Kingswood Business Park (64.9ha) and Land East of A46, Stoneleigh (23.6ha), providing a potential further 88.5ha towards Warwick's local supply.

Abbey Park MIS.6

- 9.19 The historical permission for 14,000 sq.m of office development at Abbey Park was not brought forward due to viability issues. Since then, office viability conditions have worsened and it is unlikely that any standalone new build office development could be delivered, at least in the short-term.
- 9.20 There is a pending application for innovative business units (E(g)(iii) use with ancillary office), which, if permitted, would contribute 1,732 sq.m / 0.4ha towards Warwick's local industrial supply.

SG01 South of Coventry / University of Warwick Main Campus MIS.7

- 9.21 As noted in the draft policy direction, the adopted Masterplan SPD will bring forward R&D development and further development may require a link road from the A46.

9.22 There is potential to bring forward further small-scale development within mixed-use schemes where accessibility to the A46 is strongest.

9.23 **University of Warwick Wellesbourne Campus MIS.8 / SG15**

9.24 This location is of particular importance to the agri-tech cluster and the proposed expansion will support spin-out businesses from the University of Warwick Innovation Campus.

9.25 Two sites are proposed for employment use within SG15 – University of Warwick Wellesbourne Campus (27ha) and Land North of Wellesbourne and Opposite Wellesbourne Innovation Campus (22ha), providing a total of 49ha of potential supply.

Wellesbourne Airfield MIS.9 / SG16

9.26 Given the location's proximity to the Wellesbourne Campus, this location is suitable to provide for expansion space for agri-tech businesses emerging from the campus, in addition to expanding the existing general industrial offer, benefitting from accessibility to the M40 via the A429. Wellesbourne West (62ha) is proposed for employment use within SG16, contributing to the non-strategic employment supply.

SG12 – Southam

9.27 Southam's existing employment sites are well-let and have a high market attractiveness. The town has an evidence digital and creative cluster. As advised in the previous study, an extension of c.5ha to the existing employment provision should be considered for allocation.

SG23 – Henley-in-Arden

9.28 Henley-in-Arden has a lack of existing employment provision. As advised in the previous study, a mixed-use site should include an employment provision of 3-5ha, benefitting from the settlement's sustainable rail access.

Outside of Major Investment Sites and Strategic Growth Locations

- 9.29 Employment allocations made outside of MIS and SGLs should have good strategic network work or major road network accessibility and strong labour accessibility, lending itself to proximity to the main population centres of Warwick, Leamington and Stratford-on-Avon.
- 9.30 With regard to the rural economy, Draft Policy Direction 18 supports employment development outside of settlement boundaries where it accords with the Spatial Growth Strategy and supports proposals for small and start-up businesses in rural areas.

10. Monitoring

- 10.0 Given the length of time of the local plan period to 2050, it is realistic to expect the plan to cover a number of different economic cycles.
- 10.1 There is potential for market dynamics to change over the plan period. Monitoring of economic and market dynamics and employment land supply will be important in ensuring that employment land provision does not constrain economic growth.
- 10.2 We set out below key indicators which we consider should be monitored to inform whether the Plan requires review; and to potentially inform the determination of planning applications. These should be considered through regular monitoring:

Table 10.1 Monitoring Indicators

Indicator	Data Source
Employment completions by use class	Annual monitoring
Losses of employment land	Annual monitoring
Losses of employment floorspace by use class	Annual monitoring
Serviced land available now (ha)	Annual monitoring
Availability level	CoStar
Average rent & rental growth by use	CoStar
Net absorption by use	CoStar

A1. Sub-Sector SIC Code Definitions

10.3 Agri-tech

- 1100- Growing of cereals (except rice), leguminous crops and oil seeds
- 1130 - Growing of vegetables and melons, roots and tubers
- 1190 - Growing of other non-perennial crops
- 1210 - Growing of grapes
- 1300 – plant propagation
- 1500 – Mixed farming
- 1610 - Support activities for crop production
- 1629 - Support activities for animal production (other than farm animal boarding and care) n.e.c.
- 10110 - Processing and preserving of meat
- 10120 - Processing and preserving of poultry meat
- 20590 - Manufacture of other chemical products n.e.c.
- 28302 - Manufacture of agricultural and forestry machinery other than tractors

10.4 Digital Creative

- 58210 – Publishing of computer games
- 58290 – Other software publishing
- 62011 - Ready-made interactive leisure and entertainment software development
- 62012 - Business and domestic software development

10.5 Logistics

- 49410 – Freight transport by road
- 49420 - Removal services
- 50200 - Sea and coastal freight water transport
- 51210 – Freight air transport
- 52103 - Operation of warehousing and storage facilities for land transport activities
- 52219 - Other service activities incidental to land transportation, n.e.c.
- 52220 - Service activities incidental to water transportation
- 52230 - Service activities incidental to air transportation
- 52290 - Other transportation support activities
- 53100 - Postal activities under universal service obligation
- 53201 - Licensed carriers
- 53202 - Unlicensed carriers

10.6 Professional Services

- 58110 – 58190
- 62020 – 66300
- 69101 – 70229
- 73110 – 73200

A2. Employment Commitments – Warwick

Site	Floorspace (sq.m)	Notes	Unit Size
Office			
63 Bedford Street, Leamington Spa, CV32 5DN	64	W/15/1993 Change of use	Sub-2,500 sq.m
Lower Heathcote, Local Centre, Vickers Way, Harbury Lane, Warwick, CV34 6SL	1,957	W/20/0878 Part of new local centre	Sub-2,500 sq.m
Convent Farm, Rising Lane, Baddesley Clinton, Solihull, B93 0DD	73	W/21/1240 Conversion to office	Sub-2,500 sq.m
Land Adj Grand Union House, Budbrooke Industrial Estate, Budbrooke Road, Warwick, CV34 5AR	440	W/22/0633 Erection of new office building	Sub-2,500 sq.m
181 Tachbrook Road, Leamington Spa, CV31 3EN	244	W/23/1086 Change of use	Sub-2,500 sq.m
Industrial			
Thwaites Ltd, Welsh Road, Cubbington, Leamington Spa, CV32 7NQ	5,007	W/21/1250 Extension to existing factory	5,000-10,000
Land Off Berrington Road, Berrington Road, Leamington Spa, CV31 1PZ	245	W/21/2193 B2/B8 unit	Sub-2,500 sq.m
The Barn, Roundshill Farm, Rouncil Lane, Kenilworth, CV8 1NN	95	W/21/2293 Change of use from agricultural building	Sub-2,500 sq.m
Units 1 to 2, Caswell Road, Sydenham Industrial Estate, Leamington Spa, CV31 1QD	1,503	W/23/0268 Extension	Sub-2,500 sq.m
Titan Self Storage, 2 Hawkes Drive, Heathcote Industrial Estate, Leamington Spa, CV34 6LX	2,182	W/23/1072 Self-storage	Sub-2,500 sq.m
Volvo Bus and Truck, Siskin Parkway East, Middlemarch Business Park, Coventry, CV3 4PW	465	W/24/0569 Extension	Sub-2,500 sq.m
Tournament Fields Business Park, 1001 Edgehill Drive, Warwick, CV34 6XQ	7,920	W/24/1031 B8 unit	5,000-10,000
Lower House Farm, Canada Lane, Norton Lindsey, Warwick, CV35 8JH	234	W/24/1684 Change of use from agricultural building	Sub-2,500 sq.m

A3. Employment Commitments – Stratford-on-Avon

Site	Floorspace (sq.m)	Notes	Unit Size
Office			
Churchlands Business Park, Ufton Road, Harbury, CV33 9GX	369	22/00081/FUL	Sub-2,500 sq.m
Cottage Farm, Banbury Road, Gaydon, CV35 0HG	405	23/01161/FUL	Sub-2,500 sq.m
Broom Court Farm, Rush Lane, Bidford-On-Avon, B50 4ER	449	24/00511/FUL (24/00512/LBC)	Sub-2,500 sq.m
Umberslade Business Centre, Pound House Lane, Umberslade, B94 5DF	375	15/02569/FUL (20/01025/VARY)	Sub-2,500 sq.m
The Yard, Walton, CV35 9HX	300	20/00861/FUL	Sub-2,500 sq.m
Pittern Hill Riding School, Pittern Hill, Kineton	500	21/00899/FUL	Sub-2,500 sq.m
Industrial			
Pitstop Café, Stretton-on-Fosse, Moreton-in-Marsh, GL56 9RE	550	Outline application 24/02581/OUT	Sub-2,500 sq.m
BBS, Waterloo Industrial Estate, Waterloo Road, Bidford-on-Avon, B50 4JH	560	Full application - erection of 560 sq.m unit. 23/00534/FUL, 19/03092/FUL (21/03217/VARY)	Sub-2,500 sq.m
Countrywide, Bearley Mill, Snitterfield Road, Bearley, CV37 0SA	2,796	Full application for employment component - 2,323 sq.m divided into smaller units 21/00973/OUT 24/00166/VARY	Sub-2,500 sq.m
3 Adams Way, Springfield Business Park, Alcester, B49 6PU	474	Full application 23/01235/FUL. Extension to existing unit and new small industrial unit	Sub-2,500 sq.m

Field Rear Of Napton Nurseries, Tomlow Road, Stockton	450	Full application 22/01653/FUL. Proposed warehouses/industrial unit for the use of the existing business on site	Sub-2,500 sq.m
Industrial Unit, The Slough, Studley, B80 7EN	2,692	Full application (22/01961/FUL). Demolition of five buildings and two bays of an existing building and the erection of two new warehouses and an extension to the existing pallet store	Sub-2,500 sq.m
Woodlands Business Centre, Malthouse Lane, Long Compton	625	Change of use of barn to B8 storage for cask storage of spirits. 23/03035/FUL	Sub-2,500 sq.m
Unit 1, Kineton Road, Southam, CV47 0DR	3,045	Full application 23/00250/FUL. Demolition of existing units and erection of warehouse	2,500 to 5,000 sq.m
Invopak, Northfield Road, Kineton Road Industrial Estate, Southam, CV47 0FJ	721	Full application 24/02217/FUL. New warehouse - 720 sq.m	Sub-2,500 sq.m
Unit 6, Westfield Road, Kineton Road Industrial Estate, Southam, CV47 0RA	359	Full application 23/01844/FUL. Warehouse extension	Sub-2,500 sq.m
Wincot Lands, Clifford Chambers, CV37 8LE	840	Full application 12/02296/FUL. Erection of 5 new industrial units. Stalled - extant due to demolition – excluded from supply	Sub-2,500 sq.m
The Grange, Hardwick Road, Priors Marston, CV47 7SG	450	Under construction 24/25 - short-term delivery 18/01777/FUL	Sub-2,500 sq.m
Land Adjacent To Severn Court, Tything Road East, Alcester	980	Under construction 24/25 - short-term delivery. Erection of E(g)(iii)/ B8 industrial units . 20/01462/FUL	Sub-2,500 sq.m

7 Brailes Industrial Estate, Winderton Road, Lower Brailes, Banbury, OX15 5JW	485	Under construction 24/25 - short-term delivery. Erection of 4 industrial buildings. 21/01858/FUL	Sub-2,500 sq.m
The Mill Industrial Park, Unit 20, Birmingham Road, Kings Coughton, B49 5QG	609	Extension to existing unit. Under construction 24/25 - short-term delivery. 21/01358/FUL	Sub-2,500 sq.m
Drayton Manor Farm, Alcester Road, Stratford- upon-Avon, CV37 9RQ	4,633	Under construction 24/25 - short-term delivery 21/00031/FUL (24/01873/VARY)	2,500 to 5,000 sq.m
Dickensbury Farm, Walton Lane, Pillerton Priors, CV35 0PJ	444	Under construction 24/25 - short-term delivery 22/00030/FUL	Sub-2,500 sq.m
Newey Young Plants Ltd, Whitehill Farm, Alderminster, CV37 8BW	4,333	Under construction 24/25 - short-term delivery 23/01625/REM, 22/03048/OUT	2,500 to 5,000 sq.m
College Farm, Lower Quinton, Stratford-upon- Avon, CV37 8SH	500	Under construction 24/25 - short-term delivery. 23/01750/COUR	Sub-2,500 sq.m

A4. Site Assessment Summary – Existing Employment Sites

Site Name	LA	Site Size	Vacant Land	Recommendation
Alscot Estate	Stratford-on-Avon	12.2	0	Retain as an existing employment site
Arden Road/Arden Forest, Alcester	Stratford-on-Avon	26.8	0	Retain as an existing employment site
Avenue Farm, Birmingham Road	Stratford-on-Avon	6	0	Retain as an existing employment site
Bird Industrial Estate, Long Marston	Stratford-on-Avon	1.8	0.05	Retain as an existing employment site
Birmingham Road, Studley	Stratford-on-Avon	6.2	0	Opportunity to intensify / redevelop
Blackwell Business Park	Stratford-on-Avon	0.9	0	Retain as an existing employment site
Blue Lias Industrial Estate	Stratford-on-Avon	1.6	0	Retain as an existing employment site
Bomford Turner, Salford Priors	Stratford-on-Avon	4.3	0	Retain as an existing employment site
Brailes Industrial Estate	Stratford-on-Avon	1.2	0	Retain as an existing employment site
Brickyard Lane, Studley	Stratford-on-Avon	2.7	0	Retain as an existing employment site
Bromsgrove Road/Green Lane, Studley	Stratford-on-Avon	6.8		Retain as an existing employment site
Brookhampton Lane/Plantagenet Industrial Estate, Kineton	Stratford-on-Avon	4.1		Retain as an existing employment site
Business & Technology Park, Banbury Road	Stratford-on-Avon	2.5	0	Retain as an existing employment site

Clifford Park Business Centre	Stratford-on-Avon	4.7	0	Retain as an existing employment site
Dene Park Industrial Estate, Wellesbourne	Stratford-on-Avon	11.8	0	Retain as an existing employment site
East of Kineton Road, Southam	Stratford-on-Avon	10.8	0	Retain as an existing employment site
Goldicote Business Park	Stratford-on-Avon	4.5	0	Retain as an existing employment site
Jaguar Land Rover, Gaydon	Stratford-on-Avon		0	Retain as an existing employment site
M40 Distribution Park, Wellesbourne	Stratford-on-Avon	23.3	0	Retain as an existing employment site
Ryon Hill Business Park	Stratford-on-Avon	4.4	0	Retain as an existing employment site
Shottery Brook Business Park	Stratford-on-Avon	10.7	0	Retain as an existing employment site
Tilemans Lane, Shipston-on-Stour	Stratford-on-Avon	8	0.7	Retain as an existing employment site. Develop vacant plot – planning permission pending
Troy Industrial Estate/Chusnut Court, Sambourne	Stratford-on-Avon	3.5	0	Retain as an existing employment site
Waterloo Road/Bidavon, Bidford-on-Avon	Stratford-on-Avon	12	0	Retain as an existing employment site
West of Kineton Road/Hollywell, Southam	Stratford-on-Avon	12.6	0	Retain as an existing employment site
Barrack St and Northgate St, Warwick	Warwick	1.5	0	Retain as a town centre employment area – redevelop Barrack Street offices

Althorpe Street, Leamington Spa	Warwick	1.5	0	Retain as a town centre employment area – encourage refurbishment
Hamilton Terrace, Brandon Parade and Holly Walk, Leamington Spa	Warwick	5.3	0	Retain as a town centre employment area – encourage refurbishment
Budbrooke Road Industrial Estate, Warwick	Warwick	6.9	0	Retain as an existing employment site
Cape/Millers Road Industrial Area, Warwick	Warwick	11.3	0	Retain as an existing employment site
Common Lane Industrial Estate, Warwick	Warwick	2.3	0	Retain as an existing employment site
Harris Road Industrial Estate	Warwick	5	0	Retain as an existing employment site
Heathcote Industrial Estate	Warwick	33.8	0	Retain as an existing employment site
Land Rear of Homebase	Warwick	1.5	1.5	Release – no outstanding application
Holly Farm Business Park, Honiley	Warwick	7.1	0	Retain as an existing employment site
Honiley Airfield, Jaguar Land Rover, Fen End	Warwick	79.3	0	Retain as an existing employment site
Middlemarch Business Park, Coventry Airport	Warwick	93.7	0	Retain as an existing employment site
Montague Road/Nelsons Lane, Warwick	Warwick	7.4	0	Retain as an existing employment site
Opus 40, Warwick	Warwick	8.4	0	Retain as an existing employment site
Princes Drive Industrial Estate, Kenilworth	Warwick	3.7	0	Retain as an existing employment site
Queensway Leamington Spa	Warwick	9.2	0	Retain as an existing employment site

Riverside House, Leamington Spa	Warwick	0.7	0	Release – residential redevelopment
Station Area	Warwick	2.8	0	Protect Vitsoe site as an existing employment site. Release eastern parcel – sui generis uses
Stoneleigh Deer Park / Abbey Park	Warwick	22.6	15.2	Protect existing stock as an existing employment site. Designate remainder of site as a major employment commitment
Stoneleigh Park	Warwick	100	To confirm through master planning	Continue designation as a major employment commitment
Sydenham Industrial Estate, Leamington Spa	Warwick	16.2	0	Retain as an existing employment site
Tachbrook Park & Spa Park	Warwick	65.4	0	Retain as an existing employment site
Tournament Court	Warwick	1.9	0	Retain as an existing employment site
Tournament Fields	Warwick	18	0	Retain as an existing employment site
Warwick Technology Park	Warwick	24.7	0	Retain as an existing employment site
Wedgnock Lane/Rothwell Road, Warwick	Warwick	11.3	0	Retain as an existing employment site
Total			0.8	