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Stafford Borough – Economic Development & Housing Needs Assessment (EDHNA)

Stafford BOROUGH COUNCIL

Planning for
Stafford Borough Council
June 2026

Contents

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Quality Assurance

This report has been prepared within the quality system operated at Rapleys LLP according to British Standard ISO 9001:2015.

We confirm that the undersigned is an appropriately qualified and experienced Chartered Planner experienced in the commercial property sector.

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1 INTRODUCTION

BACKGROUND

1.1 Stafford Borough Council have commissioned an update of their economic and housing evidence, as a joint study, to inform their new local plan. The report is structured in two parts mainly because, while the housing and economic evidence share a common strand as regards labour supply, the majority of the evidence is distinctly separate – following separate chapters of the National Planning Policy Framework (NPPF) and different technical guidance.

1.2 The emerging Stafford Borough New Local Plan 2025-2045 that this evidence informs will replace the Plan for Stafford Borough (2011-31) that was adopted in 2014 and Part 2 adopted in 2017.

1.3 The adopted Plan was due to the replaced previously and an update to the economic and housing evidence had been prepared by Lichfield's in 2020. This covered a possible plan period of 2020-2040. However, that plan was not taken forward because of major changes to national policy, and most significantly revisions to the NPPF and housing need.

1.4 The Lichfield's work, following the guidance extant at the time, advised the Council to plan for too few new homes when compared with current mandatory housing targets introduced in December 2024. The previous local housing need was a minimum of 391 new homes per year, but current national guidance sets the minimum at nearly double that number, currently at 760 homes per year. While the emerging plan sought more homes than the minimum (500 a year) the uplift was considered so significant that core elements of the plan needed visiting – including the spatial strategy.

1.5 This work is being progressed with a view to a replacement for the adopted Plan for Stafford Borough; focused on Stafford Borough but is undertaken in the context of a strategic West Midlands wide evidence base for large scale, industrial and logistics uses, together with a new Spatial Development Strategy.

1.6 For large users this strategic work placed Stafford Borough in a shared Staffordshire / Stoke-on-Trent market area which, for this study, means that, should Stafford Borough find land delivery a challenge due to land availability and / or infrastructure, this could instead be accommodated in the wider North Staffordshire area.

1.7 Furthermore, because the two markets are linked for large unit demand, Stafford Borough's land choices have an impact on North Staffordshire including Stoke-on-Trent. This work should seek to accommodate Stafford Borough's need within its boundary, but further engagement with neighbours is clearly needed due to the potential impact on large brownfield land supply.

1.8 As suggested in the Planning Practice Guidance (PPG), in undertaking this study there has been engagement at length with the commercial property market, and this provides a qualitative view of future employment need.

1.9 This interaction also teases out particular issues and concerns that the quantitative assessment is less likely to identify. 'Overlaying' the qualitative view provides a 'sense test' of the quantitative assessments, and vice versa.

1.10 Engagement with the market was undertaken by a specialist surveyor in this field, and with a wide range of property professionals on a one-to-one basis in the early stages of the study. This helped form a rounded view of the property market now and where it is heading in the future, and then towards the end of the study an open forum was held to 'sense test' the findings, and the policy direction and recommendations this suggested. The key consideration for the property market engagement was to establish the nature of the committed and potential future land supply, and critically is the supply of the right type, available in the right place and at the right time to support growth, innovation and improved productivity.

- This report provides: The Policy Context, summarising national policy and practice, and the neighbouring areas' approaches to employment planning (Chapter 2). This is important as it identifies the themes that the study needs to review.
- Chapter 3 re-assesses the Functional Economic Market Area as it applies to Stafford Borough compared to the 2020 Lichfield study, based on the recently released 2021 Census commuting dataset.
- Chapter 4 sets out Stafford Borough's socio-economic context, looking at the indicators of residents, workforce and business performance.
- Chapter 5 reports the findings of the property market analysis, setting out the consensus view of market performance and where Stafford Borough's economy is heading in the future
- Chapter 6 reports on the quantitative assessment of future need for employment floorspace / land
- Chapter 7 considers the committed and potential supply of future employment land, before finally,
- Chapter 8 concludes and draws out the recommendations.

1.11 This report, and the housing study, will support and accompany the next stage in plan-making and has been drafted to align with extant, February 2026 National Policy and Guidance – including the PPG. While updates to guidance are unlikely to invalidate this work (and the housing suite) in its entirety, the Council needs to keep this under review.

2 POLICY CONTEXT

INTRODUCTION

2.1 This section reviews national policy and guidance, and local planning policy and evidence for Stafford Borough as well as neighbouring councils within Staffordshire. The aim is firstly to establish the requirements and guidance when planning for economic development, and secondly to draw out the scale and type of employment land need identified across the wider context.

2.2 Relevant national and local policy is set out below. In summary:

- Economic policies need to be positive while realistic;
- Policies can be aspirational, but land should not be sterilised for an economic use that has no reasonable prospect of being delivered in the Plan period;
- Policies need to pay particular regard to facilitating development to meet the needs of a modern economy;
- Recent changes to the Planning Practice Guidance (PPG) have increased the prominence given to logistics as an economic land use capable of commanding considerable weight in the planning balance; and
- Councils should, within the limits of their sustainable capacity, work with neighbours to meet economic needs in full.

NATIONAL PLANNING POLICY AND GUIDANCE

2.3 The National Planning Policy Framework (NPPF) was originally published in March 2012 and has been revised a number of times since, most recently in December 2024. At the time of drafting this report, a new consultation version of the NPPF (December 2025) was available.

2.4 As regards to economic development, and employment planning, the NPPF seeks to support the development of a strong, responsive and competitive economy by identifying and coordinating the provision of infrastructure, ensuring that there is enough land (of the right type, in the right place, and at the right time) to support growth and encouraging innovation and improved productivity. This has been a long standing principle – that planning, and development plans should enable economic growth and also provide sufficient flexibility for a change in circumstance.

2.5 While there is currently a new version of the NPPF in circulation (December 2025) this does not change the key positive economic message flowing from previous versions, including the need to consider market signals. In this regard the latest national policy consultation proposed National Development Policy (E2) to confirm that any analysis needs to consider both the availability of land and floorspace – recognising that planning's function is to provide (and control) the supply of land, and the land market works differently to the second hand floorspace market; Major strategic occupiers commonly use a 'built to suit' model whereby development land is offered and space is developed directly for them – bypassing the floorspace market. Planners cannot deliver built floorspace and only provide the land to do so.

2.6 In the Stafford Borough area the 2024 West Midlands Strategic Employment Sites work has already considered the need for national and regional warehouses, and the emerging NPPF would not suggest any change in approach is needed.

2.7 National policy identifies offices as remaining 'main town centre' uses and subject to the sequential test.

2.8 As regards plan-making the emerging guidance suggests that when 'baselining' evidence councils should rely on national statistics and / or their monitoring data. National Statistics provide a view regarding job and sector change while Stafford Borough Council's Authority Monitoring Report (AMR) details land and floorspace change using data that is relevant to plan-making:

> *"current picture of your area, informed partly by the data you will have collected though monitoring your existing local plan[1]".*

2.9 One interesting area of emerging guidance is the new Planning Inspectorate National Service (PINS) local plan 'checklist' requires only a 10 year supply of 'main town centre' uses (including offices) reflecting the December 2024 version of the NPPF – that version required 15 years for other economic uses, but only 10 for offices. This flexibility does not appear to have been carried into the 2025 consultation where 15 years is required for all economic uses. It is unclear whether this shift is deliberate or not.

2.10 In summary – the thrust of the NPPF remains largely unchanged, and while elements of planning for logistics have been given greater prominence, the West Midlands already has a strategic evidence base that considered market signals for logistics, and the geography of the sector across the whole region. Councils should use their plan-making evidence, including their AMRs where possible through data that is publicly available and not behind 'paywalls' and only available to specialists.

2.11 It may be that future changes are made to the PPG, which has been largely unchanged for many years despite extensive lobbying to Central Government. This study therefore continues to apply the PPG and, in line with emerging advice 'baselines' the future plan by reference to official statistics and / or local plan monitoring data.

Planning Practice Guidance (as drafted January 2026)

2.12 The PPG provides guidance on how Local Planning Authorities (LPAs) should assess the future need for economic development, and although the NPPF was recently revised the guidance remains largely unaltered from that issued in 2019.

2.13 Current guidance states that key to assessing economic needs is understanding existing business needs, local circumstances and market conditions as national trends will not necessarily 'translate'.

2.14 The Guidance lists a raft of measures suitable for the assessment of business needs, which are not repeated here, but highlight the suggested need for close liaison with the business community and taking account of Local Industrial Strategies. In future it is anticipated this will include Local Growth Plans.

2.15 The Guidance identifies appropriate approaches and data for the assessment of future need:

- for labour demand - sectoral and employment projections that look at likely changes in skills needed;

[1] Collect data and analyse trends, MHCLG Guidance Gathering baselining information to inform a local plan, 27 November 2025

- for labour supply - demographically derived assessments of current and future local supply;
- analysis of past take-up of employment land / property and / or future property market requirements; and
- stakeholder engagement, business trend analysis, changing business models (particularly for sectors making use of online platforms), and monitoring of business, economic and employment statistics.

2.16 The assessments will need to take account of longer term economic cycles and consider the implications of alternative economic scenarios.

2.17 Analysis of market demand should involve a comparison between the available stock of land and the particular requirements of an area to identify gaps and the under / over-supply of land. The guidance on market demand goes on to state that the need assessment approaches will help with an understanding of the requirements for specifically – office, general business and distribution space, and indicate any mismatches between types of supply and demand. This understanding can then form the context for appraising individual sites.

2.18 The Guidance advises the data / approaches that can be used to translate from economic sector to land use. This involves Standard Industrial Classification (SIC) data, Employment / floorspace ratios and Floorspace / site area ratios, all of which are incorporated in the study's sector 'mapping, method.

2.19 The needs and space requirements for the logistics industry are specifically referenced. The PPG notes that the sector *'plays a critical role in enabling an efficient, sustainable and effective supply of goods for consumers and businesses'* and contributes to local employment opportunities. It has distinct locational requirements, and these need to be considered separately from general industrial land.

2.20 For logistics facilities with national / regional significance, a significant quantum of land (with good access to strategic transport networks, and sufficient access to power and skilled local labour) is generally required. Where such a need exists, LPAs responsible for strategic policy should collaborate with other LPAs, infrastructure providers, relevant interests to identify scale of provision. This can be informed by:

- Engagement with logistics developers / occupiers to understand changing requirements (type, size, location, impact of new / emerging technology);
- Analysis of market signals (trends in take-up, availability of logistics land / floorspace);
- Analysis of economic forecasts (identifying potential changes in demand, anticipated growth in sectors likely to occupy or rely on logistics facilities); and
- Engagement with Councils' Economic Development teams - reviewing plans and strategies, including economic priorities within Local Industrial Strategies.

2.21 Once logistics need has been assessed, LPAs responsible for strategic policy need to consider how to meet it, by expanding existing sites and / or identifying new ones.

2.22 Beyond national / regional need, LPAs should also assess other requirements in the logistics sector, for example Small Medium-sized Enterprises (SMEs) and 'last mile' facilities serving local markets. Any such assessment may need to consider a range of up-to-date evidence to provide an appropriate provision including amount, type, and location.

This can include market signals, anticipated changes in the local population / housing stock, the local business base, and infrastructure availability.

2.23 The final issue considered by the current Guidance (dating from 2019) addresses the specific locational requirements of specialist or new sectors of a modern economy. The Guidance underlines that the wider modern economy sectors may have specific requirements in terms of land / premises needed. The example is given of how the clustering of some industries, such as high tech, creative digital etc... can support collaboration, innovation and productivity as well as raising economic prospects in an area. The Guidance gives examples of these requirements, that may be more qualitative in nature and be identified through business engagement, as a need for greater studio capacity, co-working spaces or research facilities.

2.24 The Plan-making section of the PPG provides guidance on defining Functional Economic Market Areas (FEMAs), setting out the factors that can be assessed when considering the extent of a FEMA. Understanding economic flows will help inform decisions on new housing locations and will guide transport and other infrastructure investment.

2.25 In the next chapter consideration is given to the appropriate FEMA for Stafford Borough, reviewing earlier assessments in 2020, and focusing on the latest commuting (origin and destination) data that has recently been released from the 2021 Census. It is noted that for more strategic industrial and warehouse uses the recent Strategic Sites work highlights a Stoke-on-Trent and Stafford Borough market area, which is not revisited in this study.

Changes to Use Class and the General Permitted Development Order (GPDO)

2.26 The Government revised the 1987 Use Class Order in 2020, introducing Use Class E, a new class combining 'commercial, business and service'. This merged:

- Office, Research & Development and light industrial (formerly Class B1; now Class E(g));
- Shops, commercial services, restaurants, public houses and hot food (formerly Class A; now Class E(a) to (c)); and
- Non-residential institutions and assembly and leisure (formerly Class D; now Class E(d) to (f)).

2.27 Buildings can change between any of these uses without planning permission, something likely to impact the supply of Class E(g) uses. Whilst it may encourage hybrid workspace facilities, it may reduce the availability of low-rent Class E uses (e.g. light industrial).

2.28 Use Classes B2 (general industrial) and B8 (storage and distribution) are unaffected.

2.29 As amended, the GPDO 2015 allows for:

- change from office to residential (Class O);
- demolition of Class E(g) buildings, replacement by residential (Class ZA);
- construction of up to two residential storeys above detached buildings in Class E use (Class AA); and
- change of Class E to residential (Class MA).

2.30 These changes were largely driven by Government concerns of office over-supply and shortages of homes. However, a consequence is that residential can be introduced in employment areas that has the potential to generate considerable disruption for businesses.

2.31 Current Permitted Development Rights (PDR) secondary legislation ultimately restricts the power Local Planning Authorities (LPAs) have, to prevent loss of Class E(g) uses. Regardless of need and supply assessments, an LPA cannot prevent the loss of existing stock, including on sites that are, from a policy perspective, the most preferable for economic growth, unless they are able to introduce specific and targeted Article 4 Directions.

LOCAL PLANNING POLICY

2.32 The Stafford Borough Local Plan currently consists of the Plan for Stafford Borough 2011-2031 adopted in June 2014, and the Plan for Stafford Borough Part 2 adopted in January 2017.

2.33 The statutory development plan also includes the Minerals Local Plan for Staffordshire 2015-2030 (2017), and the Staffordshire and Stoke-on-Trent Waste Joint Waste Local Plan 2010-2026 (2013) both produced by Staffordshire County Council. There are also a number of 'made' Neighbourhood Plans

2.34 The Stafford Borough New Local Plan 2025-2045 is currently being prepared following the Cabinet decision on 6 March 2025 to start a new plan-making process in the context of the National Planning Policy Framework published on 12 December 2024.

2.35 The Plan for Stafford Borough 2011-2031 sets out strategic policies and identifies development locations for housing and employment. The plan's spatial vision states that by 2031 Stafford Town will have:

- provided an enhanced national and regional profile through major new housing and employment developments as the Growth Point, supported by a range of new infrastructure provision;
- achieved a strengthened and diverse economy with high quality jobs, based on specialist industries, including Small & Medium-sized Enterprises (SMEs) and the Ministry of Defence; and
- increased educational attainment at all levels and retained high quality graduate skills delivered by further education facilities and bolstered by significant inward investment.

2.36 The Plan for Stafford Borough considers the current issues and challenges across the borough, which include providing additional employment opportunities that meet local needs, concerns and aspirations for a diverse local economy, with a key challenge to provide more private sector employment and supporting the local economy by increasing the range of higher skilled jobs available in key growth areas such as emerging high technology and creative industries.

2.37 Spatial Principle 2 (SP2) of the Plan for Stafford Borough states that Stafford Borough will accommodate new growth and investment over the plan period. Throughout the Borough, provision will be made as approximately 8 hectares per year of employment land, to provide for the future needs and prosperity of residents. The employment land requirement set out in Spatial Principle SP2 for Stafford Borough is 160 hectares between 2011 – 2031.

Spatial Principle 5 (SP5) of the Plan for Stafford Borough states that, in order to achieve the scale of new employment identified in Spatial Principle SP2, the annual targets for the distribution of employment land development, supported by necessary infrastructure, will be: Stafford 56%, Stone 12% , and Rest of Borough Area 32%.

2.38 Policy Stafford 1 of the Plan for Stafford Borogh sets out the objective of creating employment growth and promoting economic diversification in Stafford Town by:

- Supporting the Science and Technology park at Beaconside as a high quality location for knowledge based industries;
- Supporting further development of Ministry of Defence land at Stafford as a military base in the West Midlands;
- Supporting the continuing retention and growth of existing public and private sector employers as well as targeting new businesses through the provision of a range of premises, support and advice
- Providing opportunities for new enterprises and businesses by allocating new employment sites with good transport links that contribute to sustainable development.

2.39 Policy Stone 1 seeks to achieve in Stone:

- Supporting the continued retention and growth of existing public and private sector businesses, as well as targeting new businesses through the provision of a range of business premises, support and advice;
- Providing opportunities for new enterprises and businesses by allocating new employment sites with good transport links, as well as support and facilities for new start-up businesses.

2.40 Policy E1 of the Plan for Stafford Borough sets out the need for providing and safeguarding an adequate supply of employment land for current and future employment uses, alongside encouraging farm / rural diversification for employment, alongside within existing employment areas, encouraging new enterprises to locate in more modern, accessible or other suitably designed and landscaped developments.

2.41 Policy E5 of the Plan for Stafford Borough notes that there are a number of significant brownfield sites located in the North Staffordshire Green Belt, known as Major Developed Sites. In order to encourage re-development of these areas for new employment provision, to support inward investment and job creation opportunities, these are identified on the Inset Maps at Hadleigh Park (previously known as Creda / Indesit works), the former Meaford Power Station, and Moorfields Industrial Estate.

2.42 In terms of the Plan for Stafford Borough, Spatial Principle 7 (SP7 – Supporting the location of new development) sets out that development or activities of a scale and nature appropriate to secure the sustainability of each settlement will be supported within the settlement boundaries and restricts development in other locations, subject to exceptions.

Meecebrook

2.43 While not formal policy this study needs to consider what possible role Meecebrook, the promoted (up to) 6,000 dwelling new Garden Community could play looking forwards, subject to the New Local Plan process.

2.44 In 2019 the Council secured Garden Community status and have received over £1 million of Government funding to help with this opportunity, supporting the development of visionary and evidence based documents.

2.45 For this study's purposes Meecebrook is considered primarily from an economic perspective because, in terms of housing supply, land in the garden community is generally substitutable with land elsewhere. While this is a simplification, the scale of a new community, with its associated social infrastructure, is capable of delivering a high quality residential offer that should be attractive to new residents.

2.46 However, from an economic perspective, investors look for more than just a high quality residential environment, they also look for one that provides space in a location, and of a qualitative nature, that meets operator needs. Jobs do not simply follow houses and cannot be attracted to a site by 'placemaking' alone; economic land needs are more specific.

2.47 With a possible 6,000 new homes on site the development, if taken forward, of the new settlement could deliver a significant uplift in local labour. The general rule of thumb, and starting point for Garden Communities, is that homes and jobs should be delivered at a 1:1 ratio – so minimising the need to travel, and delivering true mixed new communities. While this is only a guide, it is expected that any major new community to have a strong economic focus.

2.48 This work has reviewed the Vision for Meecebrook, and as drafted, it lacks a clear economic 'narrative' or rationale. While the Masterplan suggests an expansion of economic uses along Swynnerton Road the amount of new land illustrated appears smaller than the established Raleigh Hall industrial estate. While there is a lack of detail, it is very unlikely that the amount of land promoted could deliver any meaningful contribution to the 6,000 homes and their labour supply. Raleigh Hall is a low density, in terms of employment, industrial and storage site and does not provide a template to deliver a significant uplift in job counts at this location.

2.49 It is possible that the expectation was that a new station would unlock access to sustainable commuting locations, so jobs would not need to be delivered on site. This would mean that residents could sustainably commute into Stafford, and a newly regenerated town centre, and / or the West Midlands conurbation. Through such an economic perspective, based on deliver a new railway station, this would be the most likely outcome should the Garden Community progress.

2.50 This is concluded because it is unlikely that a significant uplift in local jobs could be secured simply by, as suggested in the concept, expanding the existing local offer as this not realistic; certainly not given the limited amount of economic land illustrated.

2.51 Office type development has the scope to deliver a large number of jobs on limited land, but launching a new office cluster, one that would compete with Stafford town centre, does not appear sensible at the moment. So should the Garden Community progress residents will need to access jobs elsewhere.

2.52 For these reasons as currently evidenced it is not considered that the Garden Community could provide a meaningful supply of new economic land and floorspace. If taken forward it will need a comprehensive economic strategy to understand what new space could be supported, and if jobs / homes cannot be balanced, then where these workers would find work needs to be clarified. Any 'with station' scenario also needs to balance the risk that new residents simply commute out.

2.53 In summary, as presented (and accepting the headline nature of work to date) the proposal lacks a strong economic narrative which should be at the core of the proposal and justifying the 'why here' story.

2.54 This narrative is however contingent on the new station – with a new station the area has some economic rationale; without a station it will be challenging to provide the range of economic opportunity, of this scale in this location. Therefore, the current proposal could not deliver economic space that would help address the needs identified in this study.

Stafford Town Centre

2.55 In line with national planning policy, the Council should look to direct the majority of its future office floorspace need into the town centre. Even given short term market signals for floorspace, Stafford Town has grown its office sector (jobs) and if / when confidence in the development industry returns the Local Plan needs to provide this flexibility.

2.56 Developers, their agents and advisors, are almost always driven by short term market signals while planning must consider whole economic cycles and flexibility. Stafford planners have the challenging task of balancing short term site promotion with planning policy expectations and flexibility. It is not uncommon for no sites to be positively offered by the development sector for E class and Stafford Borough Council may need to be proactive in identifying supply.

2.57 Relevant to this study is the ongoing town centre master-planning work. While the masterplan is in early stages, it is understood that this is seeking to boost the town centre office economy and provide a modest uplift in office related (i.e. including flexible E class) space.

2.58 At the time of writing locations and floorspace quantums are not fixed. While the Council should always seek to avoid net loss of floorspace when re-developing sites, this may be justified for wider place making reasons. But, overall, the plan period office need is expressed as a net number, and any losses need to be replaced where possible, and especially while vacancy rates are reasonable.

2.59 As things stand the aggregate net additional employment floorspace figure is in the region of 15,000 sq m spread across three town centre sites – the largest being Station Gateway that could deliver c13,000 sq m of new space, with additionally Victoria and Riverside South. A note of caution is needed with the Station Gateway office quantum's as while the Station Gateway Masterplan does identity commercial / e-class space very little is proposed around the station or existing town centre. If the Masterplan area is to be relied on to meet plan period, office type, growth the commercial strategy of the masterplan may need to be reconsidered to ensure that the commercial offer is deliverable and in demand.

2.60 The masterplan is progressing to the same period (i.e. 20 years) as the emerging Local Plan and, given the time horizon, needs to consider the market across economic cycles, and not just respond to current adverse market signals for the office sector as a whole. High-level masterplan aspirations need to be 'translated' into defendable Plan allocations through significant delivery evidence, key to which will be willing landowners. Any site specific proposals that do not have the broad endorsement of landowners will struggle to be translated into formal planning policy. The masterplan needs to build a positive consensus for all town centre landowners.

NEIGHBOURING AUTHORITIES IN STAFFORDSHIRE

2.61 The following section discusses the ongoing work to assess the scale of employment land need at district level.

City of Stoke-on-Trent

2.62 The Stoke-on Trent Regulation 18 Local Plan underwent consultation from September – October 2025. The Regulation 18 consultation was informed by a joint Economic Needs Assessment with Newcastle-under-Lyme (June 2020) and a Housing and Employment Needs Assessment Update (November 2021).

2.63 Draft Policy E1 of the Regulation 18 Local Plan identifies over the plan period, a minimum of 84 hectares (ha) of employment land will be provided to allow for a range of employment sites to support both local and strategic economic need and demand.

2.64 Draft Policy E2 states that the council will support proposals for employment development (Use Classes E(g)(ii), E(g)(iii), B2 or B8) on the sites indicated on the Policies Map and listed within the site allocations.

2.65 The Employment Needs Assessment (ENA) identified that between 83.9 ha and 241.4 ha of additional employment land could be needed in Stoke-on-Trent between 2020 and 2037. The Employment Needs Assessment update (2021) included a review to align with the new plan period (2020-2040), which implies a need for between 86 ha and 282 ha of employment land in Stoke-on-Trent over the plan period. Both the ENA and the Update identified that there was around 228.7 ha of existing employment land in Stoke-on-Trent as of April 2020 and that this existing supply appears to meet the need implied under all scenarios except the past take-up scenario.

Newcastle under Lyme

2.66 The Newcastle-under-Lyme New Local Plan was submitted for examination, with consultation on main modifications to the borough local plan taking place from November – December 2025.

2.67 The current Draft Local Plan (2024) Policy PSD1 makes provision for a minimum of 63 ha of employment land over the Plan period 2020 – 2040.

2.68 Policy EMP1 states that, in accordance with Policy PSD1, proposals for employment development for Use Classes E (g) (Offices, research and development or light industrial uses which can be carried out in a residential area without detriment to its amenity), B2 (Industrial) and B8 (Storage and Distribution) will be supported in principle within the settlement boundaries of the Strategic, Urban and Rural Centres and on employment land allocated in the Plan to support growth and meet local employment needs. Development within employment sites that is not within E (g)/B2/B8 use will only be supported where it is for an ancillary use.

2.69 The Local Plan allocates strategic sites AB2 (Land at Junction 16) and KL15 (Land at Barkers Wood, Keele) to provide resilience in employment land supply and ensure that employment land needs are met during the plan period.

2.70 The plan is informed by a joint Economic Needs Assessment with Stoke-on-Trent (June 2020) and a further update in April 2024, which identifies an existing supply amounting to circa 48.9 ha.

East Staffordshire

2.71 The East Staffordshire Borough Council (ESBC) Local Plan was adopted in 2015 and covers the period up until 2031. A 2025 review concluded that the ESBC Local Plan 2015 is in date and fully effective for decision making.

2.72 The Local Plan makes provision for 40 hectares of employment land which consists of 30 ha of new provision B1, B2 and B8 employment land and a continuation of 10 hectares of B1, B2 and B8 employment land.

2.73 The Council's Employment Land Review (2013) Update identifies a shortfall of employment land against identified need.

Telford and Wrekin

2.74 The Telford and Wrekin Local Plan was adopted in 2018 and covers the period up until 2031. The Local Plan review was submitted to the Secretary of State in September 2025.

2.75 The Local Plan Review publication version (February 2025) Policy S3 sets out the target to deliver a minimum 167 ha employment land up to 2040. This overall requirement is split into the following uses:

- Class Eg(i) and Eg(ii): offices or the research and development of products or processes – 32 ha
- Class Eg(iii) / B2: industrial processes or general industrial – 62 ha
- Class B8: storage and distribution – 72 ha

2.76 The Local Plan (2018) seeks to support delivery of least 76 ha of employment land. In order to provide choice and flexibility in the range and type of sites available, the Local Plan identifies 149 ha of employment land, although it was envisaged that much of this would be delivered outside the Local Plan period.

2.77 To date the Council has an existing supply of 119 ha and the Plan allocates land to deliver a minimum of 100 ha of new employment land together to meet the need and provide choice and supply in the market for new inward investment.

2.78 The 167 ha employment land requirement is informed by the Telford and Wrekin Economic and Housing Development Needs Assessment (EHDNA) Part 1 (2020) and 2 (2023) and the updated Newport Employment Land Needs Study (2023).

South Staffordshire

2.79 The South Staffordshire Local Plan is made up of the Core Strategy (2012) and the Site Allocations document (2018). Following the Regulation 19 consultation earlier this year, the council submitted the draft Local Plan Review to the Secretary of State in December 2024, and the Plan is now at Examination.

2.80 Policy DS4 of the draft Local Plan sets out the target of 107.45 ha of employment land over the period 2023-2041 to ensure that South Staffordshire's identified need for employment land of 62.4 ha is met, as well as making available a potential contribution of 45.2 ha to the unmet employment land needs of the Black Country authorities.

2.81 An Economic Development Needs Assessment (EDNA) was carried out in 2022 with a partial update published in 2024 to inform the emerging Local Plan. The study concluded an objectively assessed employment land need figure of 62.4 ha up to 2041.

2.82 Draft Policy SA5 states that the following sites (see table below) will be allocated to ensure that the district's employment land requirements identified in Policy DS4 is met.

Site Reference	Site Name	Area (Ha) of employment site for allocation	Employment Type (Use Class[1])
E18	ROF Featherstone	36	E(g); B2; B8
E24	I54	2.4	E(g); B2
E30	M6 Junction 13, Dunston	17.6	E(g); B2; B8
E44	I54 western extension (north)	16.7	E(g); B2
E33	West Midlands Interchange (WMI).	297	B8

Cannock Chase

2.83 In February 2024 the Council consulted on their Pre-Submission (Regulation 19) Local Plan, which identified that up to 74 ha of employment land will be provided over the plan period up to 2040 to meet Cannock Chase's employment needs. In 2024, the Council submitted their Local Plan for examination, and it has now been adopted.

2.84 An EDNA was prepared in 2024 which recommended between 43 to 74 ha of employment land is made available during the period 2018-40.

2.85 The Employment Land Availability Assessment 2023 (ELAA) monitors the supply of employment land in the district. It provides a list of sites which are readily available for employment, such as sites which have planning permission, and also includes sites put forward for consideration for employment purposes. The ELAA identified that there have been 17.44 ha of employment land completed between 2018 and 2023.

PLANNING POLICY AND GUIDANCE - CONCLUSIONS

2.86 In order to ensure that national policy and guidance is followed, the economic need assessment for Stafford Borough needs to include:

- a clear assessment of historic trends (involving data that considers both economic / employment and population / demography);
- a forecast of future needs that offers a range of different scenarios;
- analysis of the existing stock; and
- assessment of existing supply (i.e., consents and land with capacity).

2.87 National policy supports the opportunity to drive innovation, improve productivity and support a modern economy, and LPAs should seek to capitalise on this performance and potential.

3 DEFINING THE FEMA

3.1 Understanding the Functional Economic Market Area (FEMA) remains useful for plan making purposes because it helps inform cross boundary co-operation and the Council's understanding of how its economy is inter-related. Deriving the FEMA is achieved by identifying a boundary taking account of the factors referred to in the guidance, and in particular: travel to work areas, housing market areas, access to public services, transport networks and economic governance and partnerships areas.

3.2 Where possible FEMA definition should align with individual or groups of local authority or regional boundaries. However, because the factors referred to above that help define areas operate at different scales there does not tend to be neat alignment with administrative boundaries, so FEMA boundaries are somewhat of a 'best fit' approximation.

3.3 In this section the 'strategic' FEMA for industrial and warehousing uses is not re-tested. Regional work has already concluded that for very large occupiers they operate at the Stoke-on-Trent / Stafford Borough level and this is not revisited.

3.4 For the local FEMA, in January 2020, Lichfield's sought to define the extent of the FEMA as part of their Economic and Housing Development Needs Assessment for Stafford Borough Council. Their assessment included an analysis of previous employment evidence (the Stafford Borough Employment Land Review 2012), extent of the Local Enterprise Partnership (LEP), travel-to-work areas, flow of goods, digital connectivity, commercial market geography, service markets and transport networks.

3.5 Their analysis concluded that it is considered that the FEMA predominantly aligns with Stafford Borough's administrative boundary.

3.6 The data sources analysed presented the following picture:

- LEP Geography: the Borough was within the Stoke-on-Trent and Staffordshire LEP - now abolished with roles transferred to the Councils.
- ONS Travel to Work Area: The Office for National Statistics (ONS) Travel-to-Work Area (TTWA) analysis suggested that the Borough is predominantly a self-contained 'Stafford' TTWA, albeit with some overlap with the Wolverhampton TTWA to the south.
- Housing Market Area (HMA): the Borough was considered to comprise its own HMA.
- Commercial Market: Stafford Borough's office and industrial property market was understood to be characterised largely by localised demand. This is driven by the Borough's industrial sectors.

3.7 Overall, it is relevant to note that, with the exception of new recently released 2021 Census data that informs travel to work areas, all of the other data previously considered in the recent study remains current.

3.8 Therefore, given that this comprehensive assessment of the FEMA within Stafford Borough took place as recently as 2020, albeit prior to Covid, it can be considered that the FEMA still predominantly aligns with Stafford Borough's administrative boundary, and a further detailed analysis is not necessary.

3.9 Next, the study moves on to test whether the 2021 Census commuting data is consistent with this view.

New Commuting data

3.10 The current criteria for defining TTWAs is that at least 75% of an area's working population work in the area and at least 75% of the people who work in the area also live in the area. However, for areas with a working population in excess of 25,000, self-containment rates as low as 66.7% are accepted to define a TTWA. The 2020 Lichfields' Economic Development and Housing Needs Assessment included mapping of the ONS 2011 TTWA, which suggested that Stafford Borough forms its own TTWA.

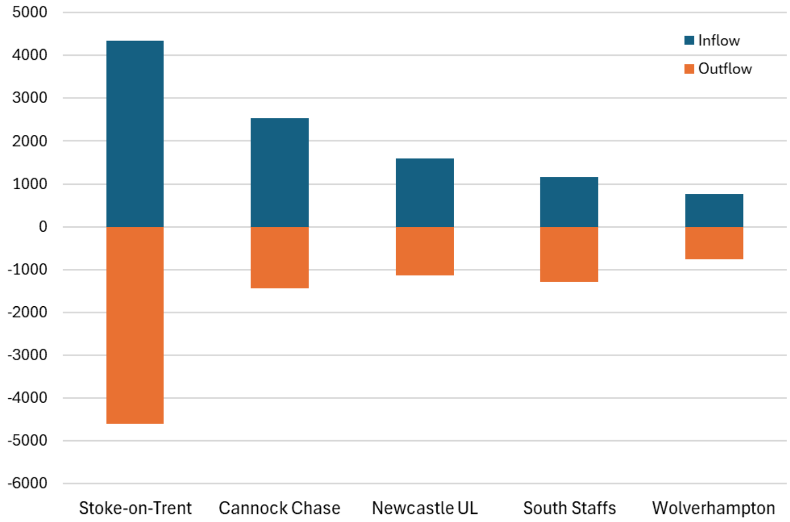
3.11 In terms of commuting flows, at the time of the 2011 Census, 43,753 local residents lived and worked in the Borough out of a total of 67,743 people who work in the Borough. Lichfield's analysis noted that this equates to 64.6%, slightly below the 66.7% required to be classified as a FEMA, but out of the 64,886 residents in employment who live in the Borough 43,753 both live and work there. This represents 67.4%, which is above the 66.7% threshold.

3.12 The Lichfields analysis highlighted the strong relationships the Borough has with adjoining local authority areas, with the ONS 2011 Census data showing a strong relationship between the Borough and Stoke-on-Trent, with 5,119 residents of Stoke-on-Trent commuting into the Borough for work and 4,631 commuting from the Borough to Stoke-on-Trent, and large numbers of residents from Cannock Chase and Newcastle-under-Lyme commuting into the Borough. There was also a strong relationship between the Borough and South Staffordshire, with 1,844 South Staffordshire residents working in the Borough and 2,018 of the Borough residents working in South Staffordshire. Weaker commuting relationships are experienced between the Borough and the other surrounding local authorities.

3.13 In terms of the 2021 Census data, Figure 3.1 below shows the origin of the inflows (blue bars) and the corresponding outflows (brown bars), with the main flows being with the City of Stoke on Trent. The overall picture is very balanced, with a similar number of inflows and outflows. There remains a strong relationship with Stoke-on-Trent, with 4,349 residents commuting into the Borough for work and 4,597 commuting from the Borough to Stoke-on-Trent. Large numbers commute into the Borough from Cannock Chase and Newcastle-under-Lyme, and there is also a strong relationship with South Staffordshire.

3.14 It is noted that commuting flows with Stoke on Trent reflect the ease and convenience of the M6 between the two centres, as it takes around 40 minutes' drive-time at rush hour, so people commute both ways.

Figure 3.1 – Stafford Borough - Commuting in and outflows 2021



Source: 2021 Census.

3.15 This analysis highlights the strong relationships the Borough has with adjoining local authority areas, and overall paints a similar picture to the 2011 Census data.

Self-containment

3.16 The final analysis is to calculate self-containment – i.e. the proportion of people who live and work in an area, based on combinations of administrative boundaries, using the 2021 Census data relating to Stafford Borough. As it shall be seen, the absolute numbers are different from the 2011 Census, which is likely down to the large numbers of people in the 2021 Census who were temporarily working from home.

3.17 The PPG does not prescribe a containment threshold that defines a FEMA. However, as mentioned, general convention is to adopt the ONS's long-standing definition of Travel to Work Areas (TTWAs) that states that:

'The current criterion for defining TTWAs is that generally at least 75% of an area's resident workforce work in the area and at least 75% of the people who work in the area also live in the area....'[2]

3.18 Table 3.1 looks at Stafford Borough's self-containment. The top row shows where Stafford Borough residents work – 49,399 were recorded as working within Stafford Borough with 16,659 (25%) travelling out to locations elsewhere for work (most notably the City of Stoke on Trent). The number of Stafford workers totals 66,058, and self-containment for Stafford Borough working residents calculates as 75% (ie 66,058/49,399). The first column calculates the rate of containment of total jobs in Stafford Borough, and this also totals to a self-containment of 75% with 16,365 persons travelling in to Stafford Borough for work, which sums to 25% of the 65,764 trips to Stafford Borough. Both containment figures (the 75%) are an increase on the previous findings that were based on the 2011 Census data.

3.19 In terms of commuting flows the pattern is balanced with almost identical numbers flowing in either direction. None the less, the proportions at 25% flowing out and in are significant, and particularly where Stafford Borough residents are commuting out to the North

[2] ONS, Exploring educational attainment and internal migration, within English Travel to Work Areas: 2002 to 2019 (2023)

Staffordshire (City of Stoke-on-Trent / Newcastle-under-Lyme) and the West Midlands conurbation where they are more likely to find higher value jobs.

Table 3.1 Self-containment – Stafford Borough

	Destination (trips to)			
Origin (from)	Stafford	Elsewhere	Total Stafford workers	Origin containment
Stafford	49,399	16,659	66,058	**75%**
Elsewhere	16,365			
Total trips to Stafford	65,764			
Destination containment	**75%**			

Source: ONS 2021 Census and Rapleys analysis

3.20 Whilst the data from the 2021 Census is influenced by Covid, this nonetheless shows an increase in self-containment levels and accord with the ONS's definition of Travel to Work Areas (TTWAs).

3.21 The ONS provides a useful interactive tool to explore commuting (workplace flow) data online[3]. This shows the flows in detail between Councils; including for example that 4,597 people commuted into Stoke on Trent from Stafford Borough which is many more times the number of Borough residents that commute into the core West Midlands conurbation – 631 into Birmingham City and 768 into Wolverhampton.

CONCLUSIONS

3.22 Lichfield's study defined the FEMA as part of their 2020 Economic and Housing Development Needs Assessment for Stafford Borough Council. Their analysis concluded that it is considered that the FEMA predominantly aligns with Stafford Borough's administrative boundary.

3.23 Given that their comprehensive assessment of the FEMA within Stafford Borough took place as recently as 2020, much of the data is still relevant, and a comprehensive analysis has not been undertaken.

3.24 A further analysis of the commuting data based on the 2021 Census has strengthened this view, with Travel-to-Work Area analysis suggests that the Borough is predominantly a self-contained 'Stafford' TTWA in accordance with the ONS definition.

3.25 Therefore, it is considered that, in accordance with Lichfield's 2020 findings, the FEMA still predominantly aligns with Stafford Borough's administrative boundary.

[3] https://www.ons.gov.uk/visualisations/censusorigindestination/

4 SOCIO-ECONOMIC CONTEXT

INTRODUCTION

4.1 This section reviews Stafford Borough's socio-economic context, benchmarking performance, and highlighting any issues in the local economy. It looks at past and present economic performance ahead of considering the forecast / projections in chapters that follow. The assessment considers the following:

- Resident economy;
- Workplace economy; and
- Business demography.

4.2 The resident and workplace economy are not always the same, and while Stafford Borough is reasonably 'self-contained' (as discussed above), there are some commuting flows between Stafford Borough and other Councils.

4.3 The datasets used in this section are official Government data sourced from National Online Manpower Information System (NOMIS) and the Office for National Statistics (ONS):

- Mid-year population estimates;
- The Annual Population Survey (APS);
- Annual Survey of Hours and Earnings (ASHE);
- ONS Jobs Density;
- UK Business Counts; and the
- Business Register of Employment Survey (BRES)

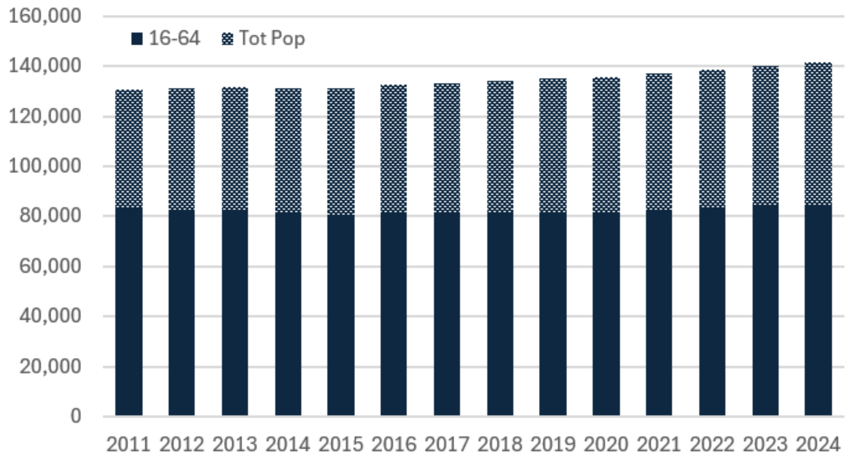
4.4 Other datasets used:

- Oxford Economics' (OE) jobs data derived from OE's economic forecast.

RESIDENT ECONOMY

4.5 Figure 4.1 below shows the change in working age (16-64) population (dark blue bars) and total population (stippled blue) in Stafford Borough over the period 2011-2024. The chart shows a very steady rise in total population, and although there has been a rise in working age population from 2011-2024, this did slightly decrease and stagnate between 2012 and 2021 before clearly rising again from 2022-2024.

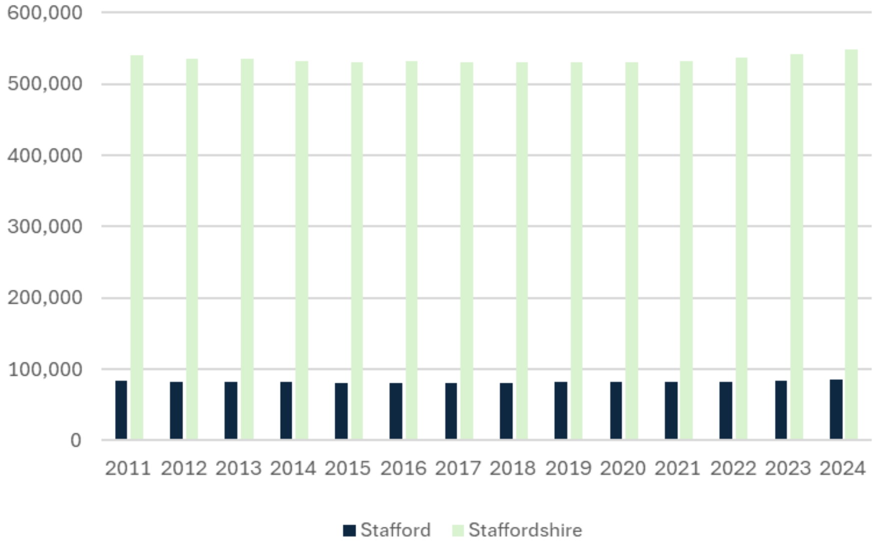
Figure 4.1 – Stafford Borough – working age and total population



Source: ONS Mid-year population estimates

4.6 Figure 4.2 below compares change in the working age population in Stafford Borough (dark bar) with Staffordshire (green bar). The trend line shows that growth in Stafford Borough's working age population has been slower in comparison with Staffordshire as a whole since over the past decade (from circa2011).

Figure 4.2 – Stafford Borough and county – working age population (aged 16-64)



Source: ONS Mid-year population estimates

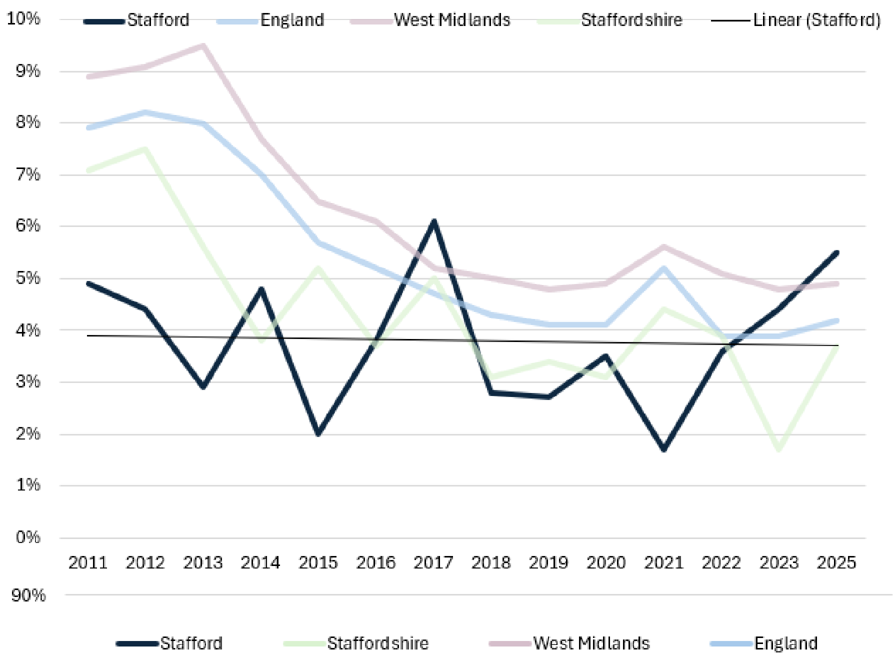
UNEMPLOYMENT

4.7 Unemployment is a core measure of labour market health. The chart in Figure 4.3 below shows Stafford Borough (dark blue bar) against the benchmarks. There is no data for Stafford Borough in 2024.

4.8 Unemployment has fluctuated in the Borough, from often being consistently lower in comparison with Staffordshire, West Midlands and England to sharp rises from 2015-2017 and 2022 to 2025 that has resulted in higher levels of unemployment in comparison with other benchmarks. Unemployment has risen from 1.7% in 2021 to 5.5% in 2025. However, as the data illustrates there have been very strong swings in the rate over short periods. New data (ONS Model Based Unemployment) for Q3 2024 suggests unemployment has dropped to 4.1%.

4.9 For this study's purposes unemployment has generally been low and there is no significant imbalance between the number of jobs and residents.

Figure 4.3 – Unemployment rate



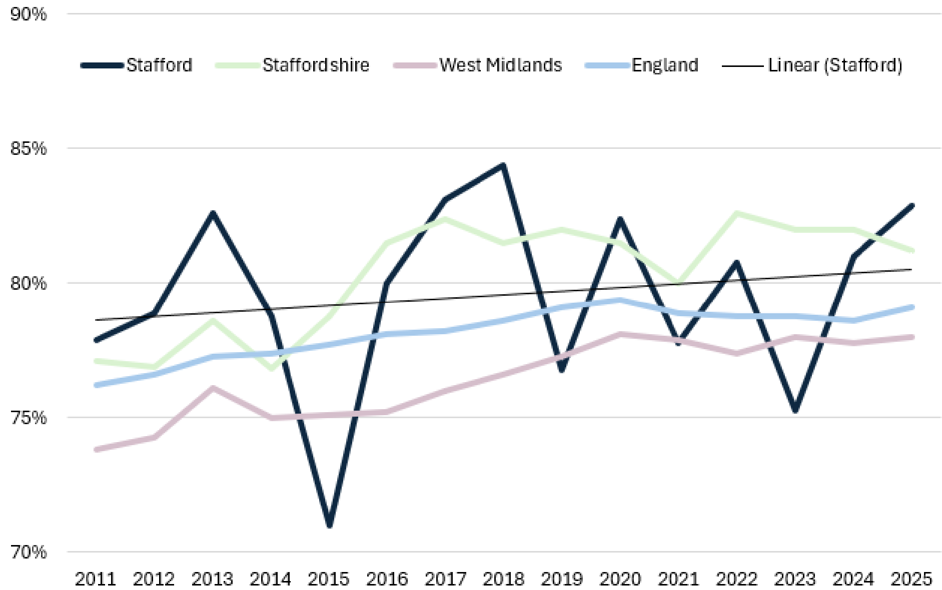
Source: ONS Annual Population Survey. No Stafford data in 2024.

ECONOMIC ACTIVITY

4.10 Economic activity rates are a critical measure of available labour, and improving rates are generally needed for economic growth. The fluctuation of Stafford Borough, as shown in Figure 4.4, appears to reflect its volatility as a smaller data set compared to county, region and national information.

4.11 The broad trend has moved from around 78% in 2011 to around 83% in 2025, which reflects a broad upward trend, despite some sharp decreases in 2015 and 2023. In 2025, economic activity was above county level and national and regional levels.

Figure 4.4 – Economic Activity Rates (persons aged 16-64)

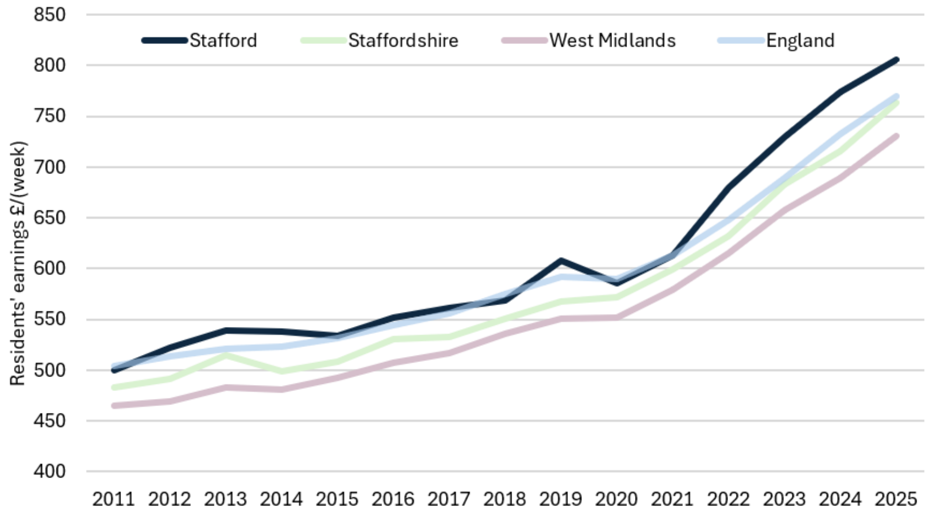


Source: ONS Annual Population Survey

RESIDENT WAGES

4.12 Stafford Borough resident earnings, as shown in Figure 4.5, have over the past 15 years broadly been higher than county, region and national levels, especially in the past 5 years.

Figure 4.5 – Resident earnings – Median, weekly gross



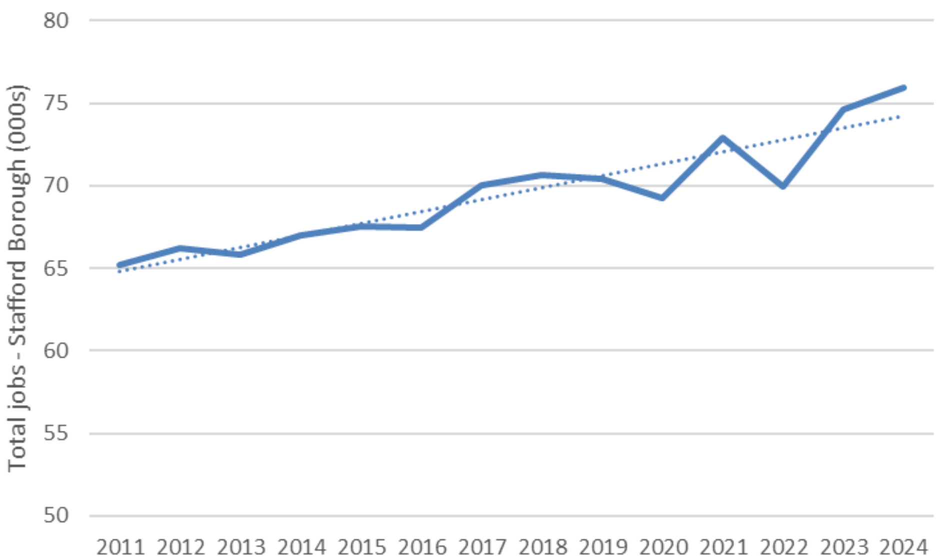
Source: ONS ASHE

4.13 Resident wages with workplace wages are compared in the next section.

WORKPLACE ECONOMY

4.14 Figure 4.6 below shows the total number of jobs in Stafford Borough from 2010 onwards, as recorded by Oxford Economics[4]. The chart shows that over the 14 year period the total number of jobs grew by around 10,000 to stand at 76,000 in 2024, with growth marginally ahead of the longer term trend in the post-Covid years (2023 onwards).

Figure 4.6 – Stafford Borough total jobs



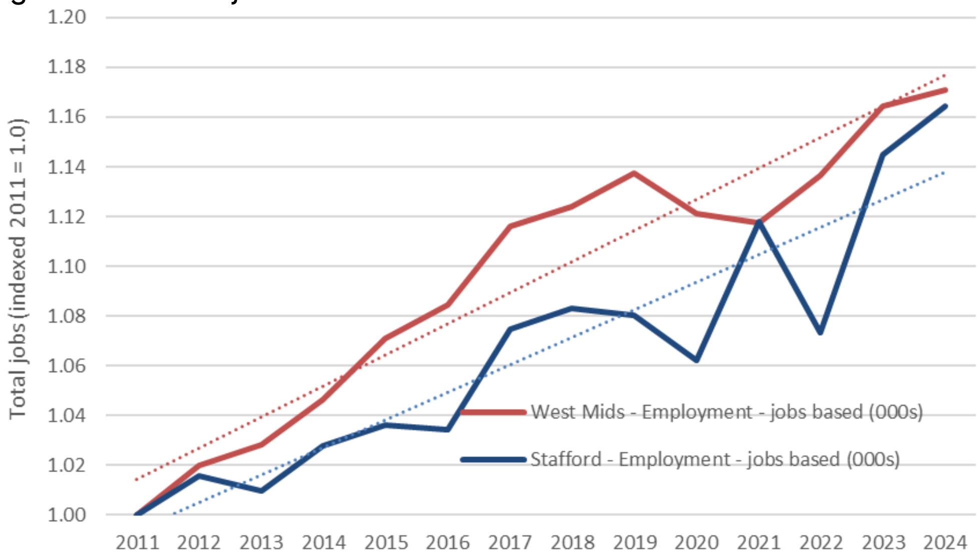
Source: Oxford Economics total jobs data series

4.15 To put this rate of growth in the regional context the chart below compares the relative change between the Borough and the region, and shows that overall, the region has

[4] The Oxford Economics historic series (October 2025).

increased jobs at a faster rate than Stafford Borough, albeit Stafford's faster rate of growth in the past couple of years has narrowed the gap.

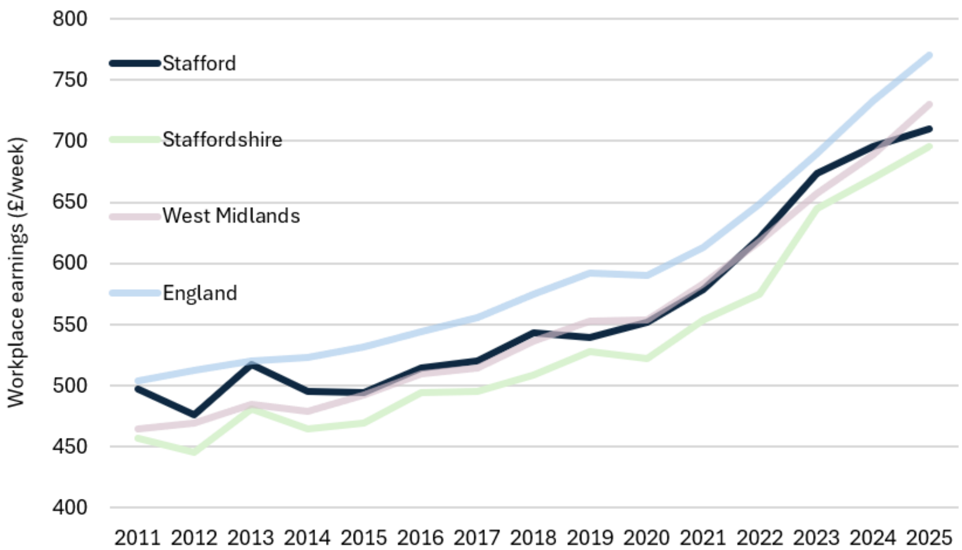
Figure 4.7 – Total jobs - indexed



Source: Oxford Economics total jobs data series

4.16 Turning next to wages, average wages for jobs in Stafford Borough have consistently been higher than county levels and have broadly been similar to regional levels, but have consistently been lower than national levels.

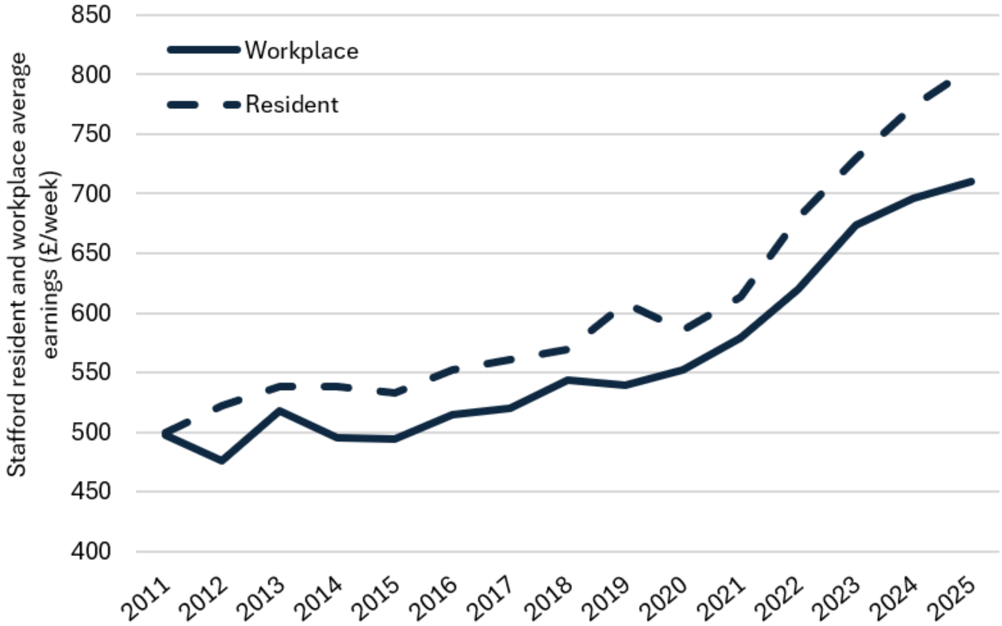
Figure 4.8 – Workplace Earnings– Median, weekly gross



Source: ASHE, ONS

4.17 Next, in Figure 4.9 below there is a comparison of resident and workplace earnings. Workplace wages in Stafford Borough (solid blue line) have consistently been lower than resident wages (dashed blue line) across the period 2011-2025. This is common, as commuting for work into nearby cities, such as Wolverhampton, Birmingham and Manchester which have good rail and road links with Stafford Borough along the M6 would result in resident wages being generally higher. Given strong local flows to Staffordshire, but lower Staffordshire workplace earnings, this suggests that even local commuting is reasonably high wage, increasing resident earnings overall.

Figure 4.9 - Stafford Borough workplace and resident earnings– Median, weekly gross



Source: ASHE ONS

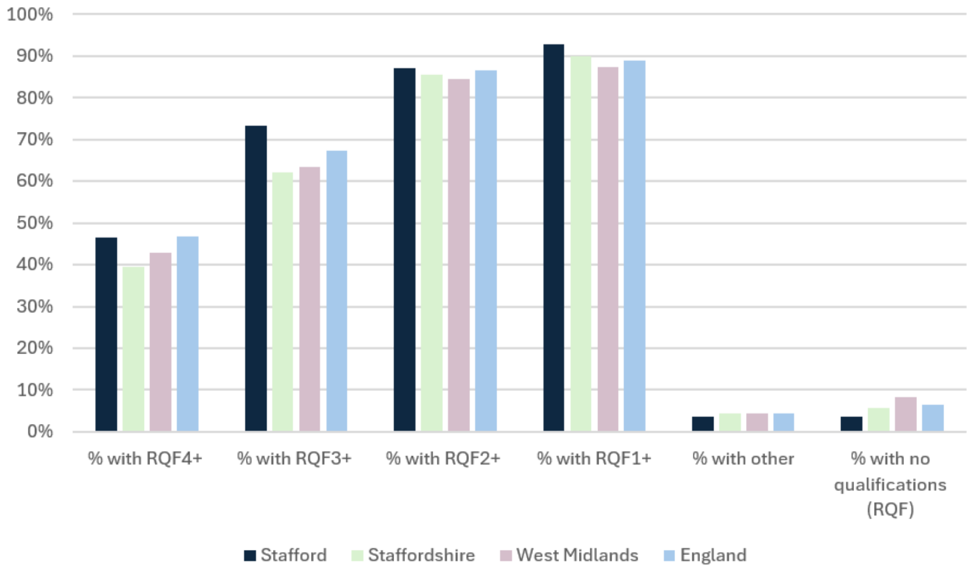
SKILLS

4.18 The skill-level of a workforce is assessed using the Registered Qualifications Framework (RQF). There are four RQF levels as listed below:

- Level 1: fewer than 5 GCSEs at grades A-C, foundation GNVQ, NVQ 1
- Level 2: 5 or more GCSEs at grades A-C, intermediate GNVQ, NVQ 2
- Level 3: 2 or more A levels, advanced GNVQ, NVQ 3
- Level 4: HND, Degree and Higher Degree and above

4.19 Figure 4.10 below shows the percentage distribution of RQF qualifications of all 16-64 year olds in Stafford Borough in 2024, alongside comparators of Staffordshire, West Midlands and England.

Figure 4.10 – Qualifications 16-64 (% of all qualifications 2024)



Source: ONS Annual Population Survey

4.20 The 2020 Lichfield's study notes that Stafford Borough has a greater proportion of working age residents with NVQ qualifications at level 4 or above compared to average for Staffordshire, the West Midlands (33.1%) or England, and that the Borough also has a smaller proportion of its working age population with no qualifications than the county, regional or national average.

4.21 Figure 4.10 shows that this is also the case in 2024, with the rate of those with RQF2+, RQF3+ and RQF4+ higher for Stafford Borough in comparison with county, regional and national level, and there is a noticeably lower percentage of people with no qualifications in Stafford Borough.

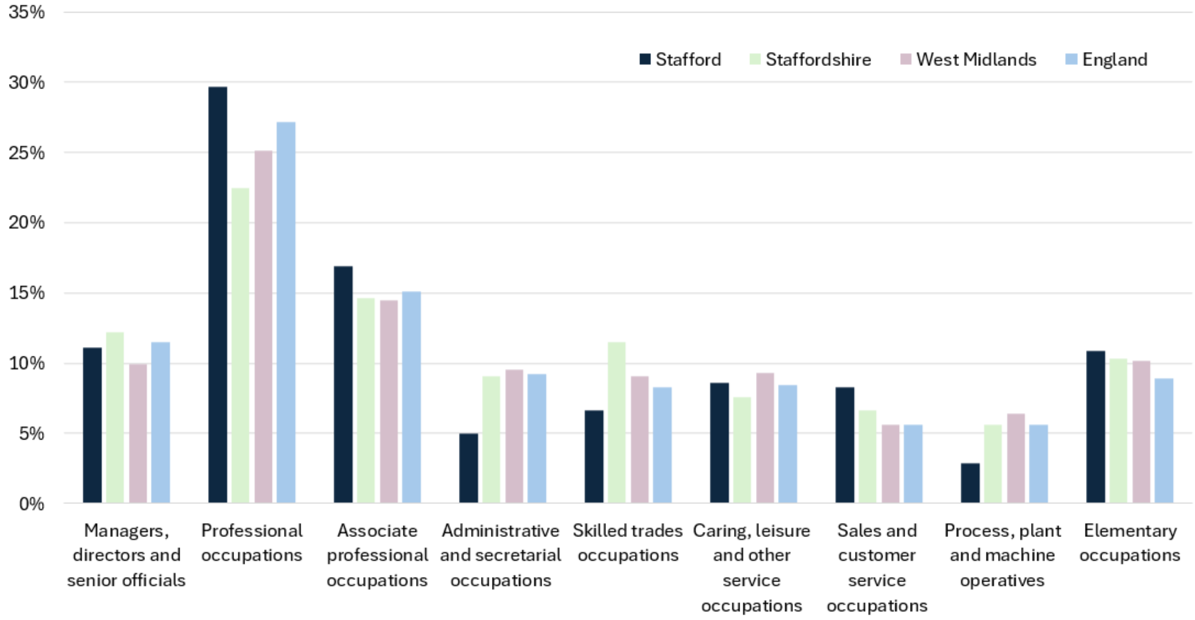
4.22 The residents' workforce is more highly qualified than the other benchmarks which is reflected in resident wages.

OCCUPATION PROFILE

4.23 Figure 4.11 below compares the occupation profile of Stafford Borough residents with the comparators. The order in the chart accords with the APS profiles order. The largest sector for Stafford Borough by far is in professional occupations, and associate professional occupations. The Borough is lower than average for administrative and secretarial occupations, skilled trades and occupations and process, plant and machine operatives.

4.24 The relatively high number of professionals appears to reflect the skills profile summarised in the previous section, although Stafford Borough also has quite a comparatively higher representation in elementary occupations and is below the wider county and national level for managers, directors and senior officials, suggesting that despite the highly educated work force reflected in the occupation profile, there remains some more unskilled and less senior occupations within the Borough.

Figure 4.11 – Occupation Profile – 2024-25



Source: ONS Annual Population Survey

JOB DENSITY

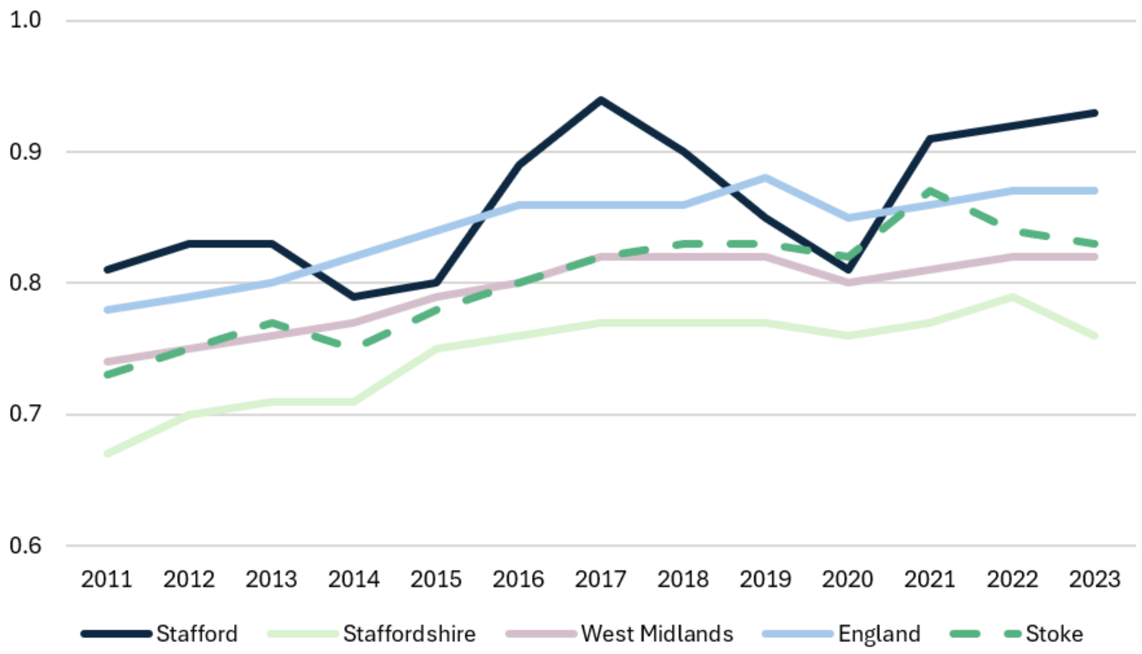
4.25 Job density measures the ratio between workplace jobs and residents in the labour force. Nationally there are around 0.87 jobs per working age resident - the national density is always less than 100% because not every worker is in active work (for example those in education or on extended leave).

4.26 The Lichfields' 2020 study identified that job density in the Borough is significantly higher than the ratio for Staffordshire, the West Midlands or England.

4.27 Figure 4.12 below shows job densities for Stafford Borough and comparators, and in addition including Stoke-on-Trent (green dashed line) for a further context, from 2011-2023. It shows that job density remains higher in Stafford Borough in comparison with the national, regional and county average and has consistently been higher than Stoke-on-Trent, the other economic driver within Staffordshire, but nonetheless remains below 1.0 in Stafford Borough.

4.28 This illustrates that Stafford Borough has a reasonably strong local labour market when compared with the wider context, but some residents must still commute elsewhere for work. It appears from the wages analysis and commuting data, that the Borough is relatively self-contained but there are some workers seeking higher wages in larger economic hubs, such as Wolverhampton, Birmingham and Manchester.

Figure 4.12 – Job Density



Source: ONS Jobs Density

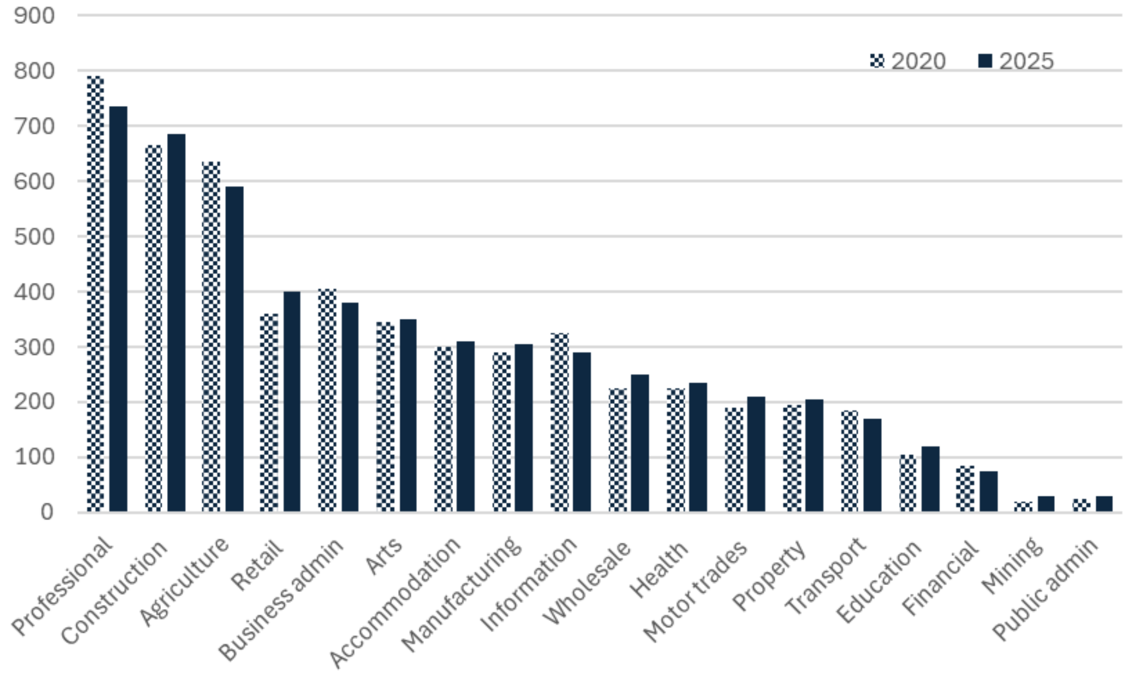
BUSINESS DEMOGRAPHY

4.29 Turning to consideration of businesses in the local economy, Stafford Borough supported a total of 5,370 enterprises in 2020 and this remained unchanged in 2025.

4.30 While little changed in terms of overall number, Figure 4.13 below shows there has been some changes in terms of industry sector over the most recent five-year period (checked bars 2020 solid black 2025). There has been a growth in most industries, but notably a decline in some of the largest industries, such as professional and agriculture.

4.31 The number of enterprises is nonetheless notably higher in agriculture and construction, showing that there are more elementary jobs within the borough and suggesting where the lower workplace versus resident wages are coming from, whilst also reflecting the Borough's predominantly rural character beyond Stafford Town.

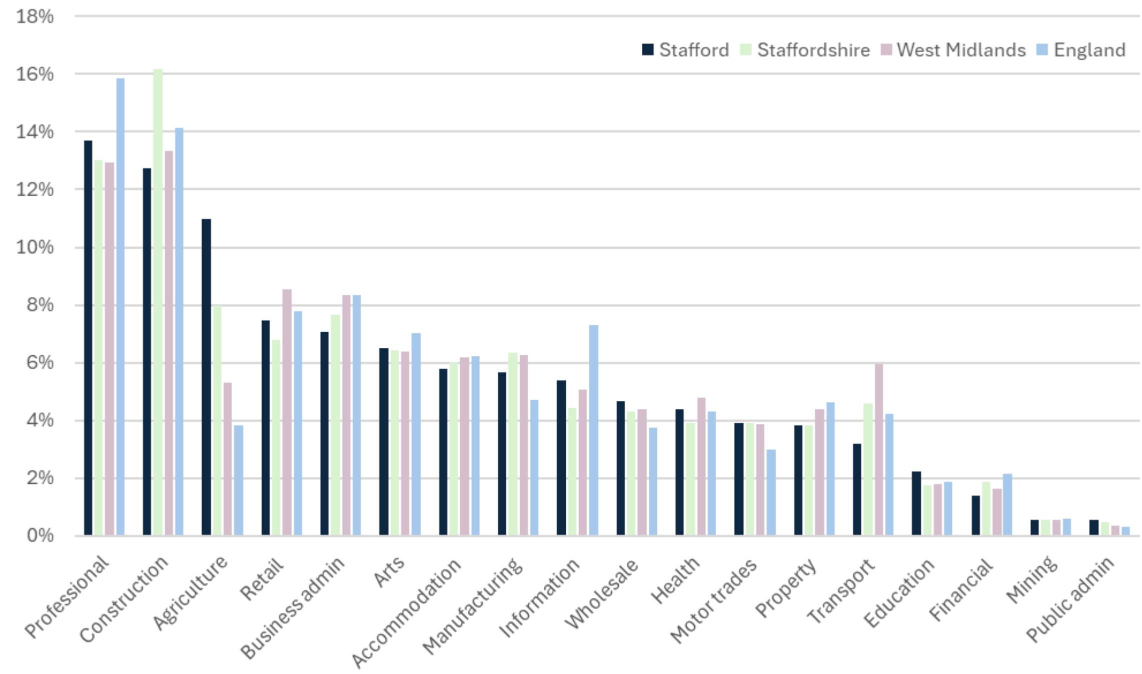
Figure 4.13 – Stafford Borough Enterprises (numbers of) by Industry – 2020 and 2025



Source: ONS UK Business Counts

4.32 Figure 4.14 below shows that business enterprises in Stafford Borough are very much dominated by professional and construction firms, and agriculture. Stafford Borough, compared with other benchmarks, has more enterprises in wholesale, education and public administration.

Figure 4.14 – Proportion of Enterprises by Industry, 2025



Source: ONS UK Business Counts

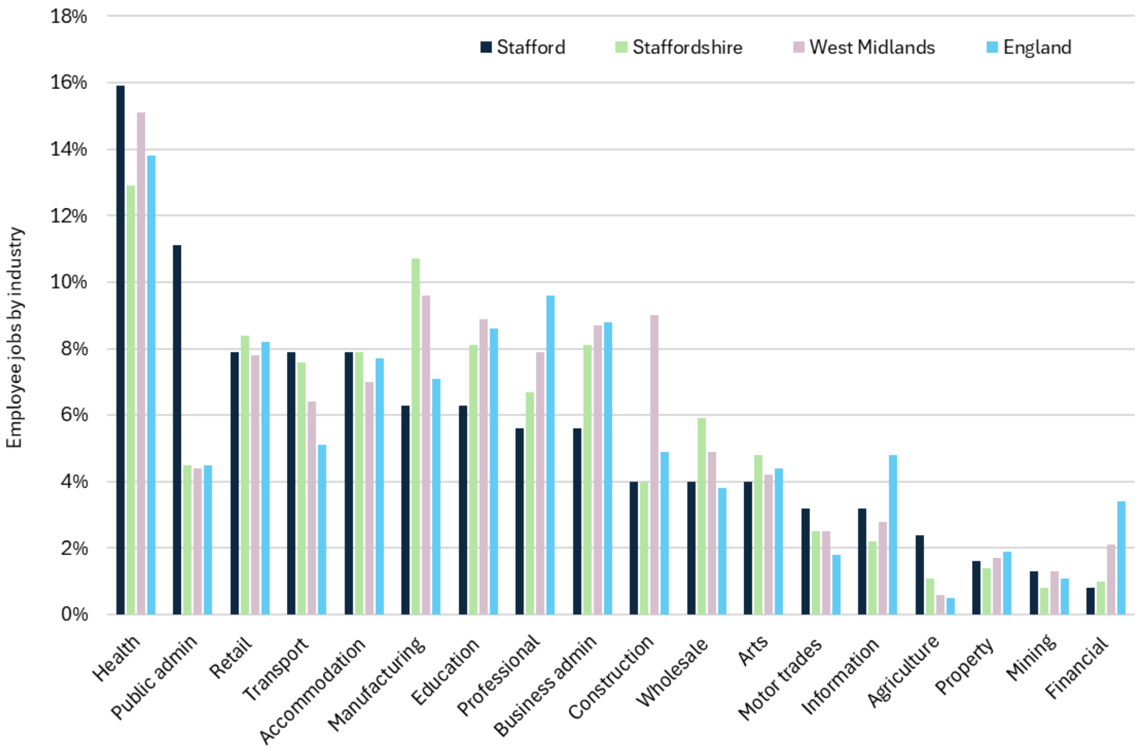
4.33 Figure 4.15 below shows employee jobs by industry in Stafford Borough in 2024 (latest available data). The proportion of Stafford Borough jobs in public administration / defence is noticeably far higher than comparators, which would be expected given the large presence of the Ministry of Defence (MOD) in Stafford Town. The bulk of overall employment is made up of health and social care, public administration, accommodation, transport and retail. Public sector jobs account for one-third of all jobs, a much higher proportion than the vast majority of other local authority areas.

4.34 These findings align with the 2020 Lichfields study which also identified that the Borough has a higher proportion of its workforce working in the public administration and defence sector than across Staffordshire, the West Midlands and England. However, the 2020 study noted that employment in this sector does not account for a significant amount of employment in the Borough overall, but it is now the second largest sector behind health, although still only at 11%.

4.35 The large percentage of health jobs versus comparators is notable, but is not reflected in enterprises. This is likely due to the presence of significant hospitals within Stafford Town, such as County Hospital.

4.36 Manufacturing jobs account for a lower percentage of jobs when compared with comparators, whereas transport jobs sit slightly higher than county, regional and national level. The percentage of jobs in construction is broadly in line with county level but notably lower than regional level.

Figure 4.15 – Jobs by Industry, 2024



Source: ONS Business Register and Employment Survey

CONCLUSIONS

4.37 Growth in working age population has been slower than overall population growth compared to neighbouring authorities. Unemployment rates have fluctuated, but the most recent data suggests they have fallen after a couple of rising years.

4.38 Economic activity rates in the borough have fluctuated over the last decade, but have risen sharply since 2023 to its highest point in 2025.

4.39 The resident economy has grown strongly since Covid, with an increase in wages at a sharper rate in comparison with county, regional and national level. This may suggest that more residents are able to access higher paid jobs post-Covid due to the ability to work from home. Public administration and health jobs are predominant, accounting for over a quarter of all jobs, and reflecting the presence of hospitals and Ministry of Defence (MOD) sites within Stafford town. Agricultural jobs and enterprises are also comparatively high, reflecting the more rural character of the Borough.

4.40 The employment base shows professional and highly skilled roles, reflecting the highly educated workforce in relation to comparators, but there are more elementary occupations at the other end of the occupation spectrum in relation to comparators.

4.41 Stafford Borough's job density, at 0.93, is more than the benchmarks, which provides a picture that the Borough has access to local employment opportunities alongside the ability to commute to larger economic hubs.

4.42 For the rest of the analysis this suggests that, at least quantitatively, the local economy provides a comparatively high number of jobs opportunities, but the local economy would benefit from additional higher waged jobs. While there is some modest out commuting this is beneficial to the local economy resulting in higher resident than workplace wages.

4.43 For future growth scenarios a higher than baseline scenario, which has been linked to the growth in labour supply, would appear sensible.

5 PROPERTY MARKET REVIEW

OVERVIEW

5.1 This chapter reviews the employment property market in Stafford Borough, covering industrial / warehouse and office uses. It considers demand, supply and the market balance, with the objective of identifying where effective demand for new floorspace exists and, in turn, the type and scale of development land that should be identified through the emerging new Local Plan.

5.2 On the demand side, the types of businesses active in taking space is assessed (and likely future requirements), together with the sizes, specifications and locations sought. On the supply side, available stock, recent development and pipeline space is analysed, together with rental values and yields achieved in the Borough. This determines:

- the extent to which current stock meets present and foreseeable occupier needs;
- whether there is likely to be additional or different space required over the plan period; and
- whether any parts of the market show relative over-supply.

5.3 The findings inform the quantum and mix (by size, quality and location) of employment sites and premises that the emerging new Local Plan should identify.

5.4 Analysis draws on actual market evidence, completed deals and active listings, to consider whether achieved rents and yields support viable development. There is a focus on effective (viable) demand: where occupiers are willing and able to commit at values, and on terms that support deliverable schemes.

Sources and definitions

5.5 Property market research has drawn primarily on the following information:

- CoStar (subscription database) market data and listings for take-up, availability, rents and yields, both for the market overall and individual properties. For the supply-side analysis in the report, reliance is placed on properties advertised for let or for sale (excluding investments).
- Valuation Office Agency (VOA) Non-Domestic Rating statistics to provide total business floorspace on a sq m basis, across the Borough; these are cross-referenced this data with floorspace vacancy on CoStar to provide a vacancy rate at Borough level. Cross-referencing the CoStar and VOA data does have limitations, as there is no guarantee that the two sources are consistent regarding unit sizes and descriptions. The reason why there may be discrepancies is that the VOA data has 117 description codes, which do not always correspond with the definition of employment premises as classified by CoStar. By contrast, properties listed on CoStar have just three categories, and some of these descriptions may fall outside the VOA definition of industrial, warehouse or office units. Due to the VOA figures being provided in aggregate, it is not possible to "iron out" these discrepancies.

5.6 To supplement the quantitative data, a virtual stakeholder workshop was held on 11 February 2026 with locally active agents and developers, and also undertook several one-to-one calls. The insights from these discussions have helped to inform an understanding of the Borough's employment property market.

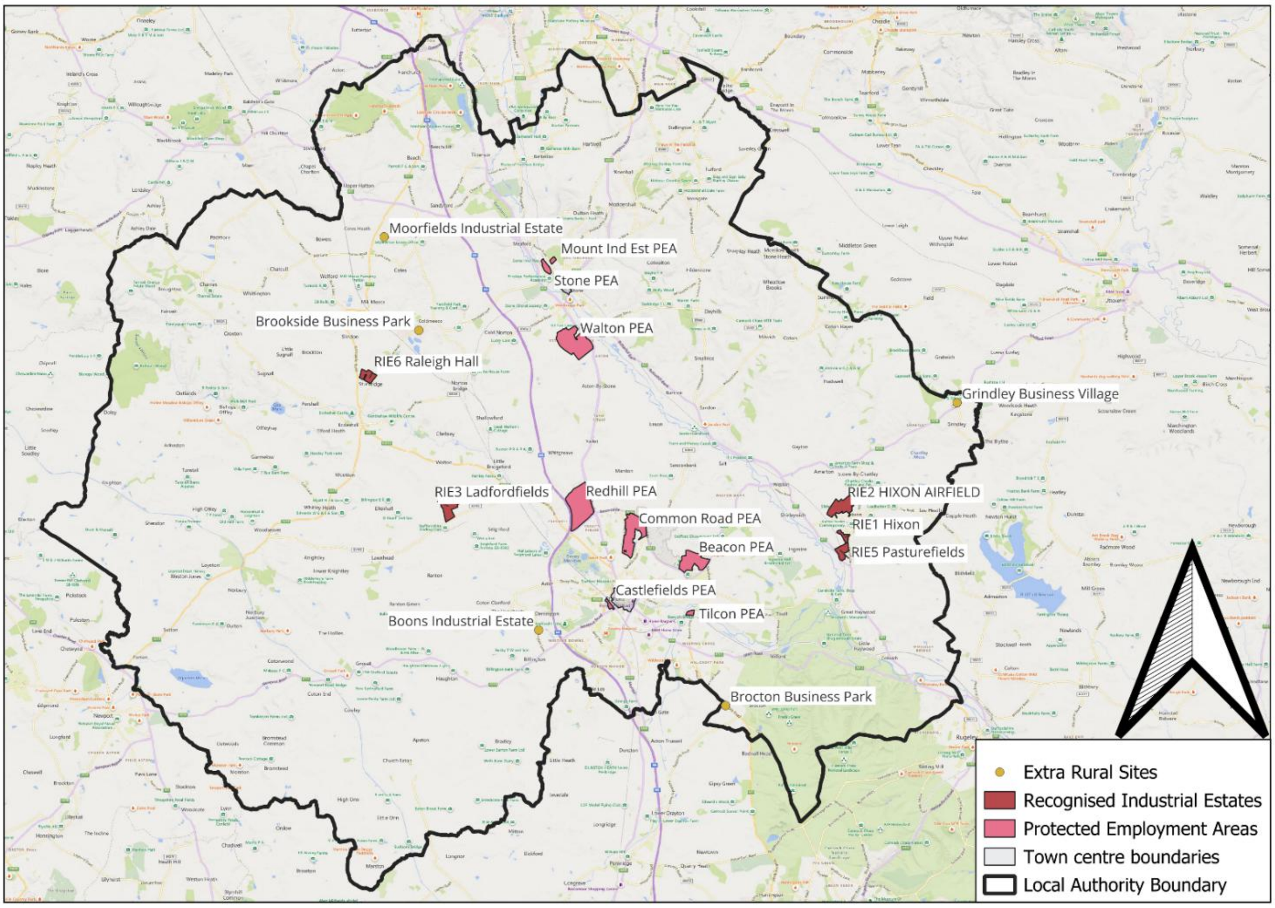
5.7 Whilst CoStar data is used in this section to assess the market, when assessing 'need' and making land related recommendations there is reliance on the Council's published monitoring data, in line with national guidance. The Council publishes its monitoring data annually, and this data is available to everyone, not only those subscribing to a commercial database.

EMPLOYMENT AREAS IN STAFFORD BOROUGH

5.8 For analysis, the Borough's existing employment areas have been grouped into broad areas. These reflect the geography of the Borough, the distribution of stock and the patterns of occupier demand:

- North of the Borough (Stone & surrounds) – Whitebridge Estate, identified as Stone Protected Employment Area (PEA) in Figure 5.1, / Mount Industrial Estate PEA, and Stone Business Park / Walton Industrial Estate (identified as Walton PEA on Figure 5.1 below) forming a cluster of established employment land around Stone, along with consented development around Meaford. These areas have good access to the A34 and A51, and accommodate a mix of small, mid-sized and larger industrial units.
- Stafford – the main concentration of employment floorspace is in Borough, including the large, long-established Tollgate and Astonfields estates (combined area known as Common Road PEA as shown on Figure 5.1) and the more modern industrial and distribution areas at Redhill Business Park and Mustang Drive near Junction 14 (combined area known as Redhill PEA as shown on Figure 5.1). The town also accommodates the Borough's principal office locations, including Staffordshire Place in the town centre and Castlefields PEA and the out-of-town Technology Park and Anson Court (identified as Beacon PEA as shown on Figure 5.1) together with Tilcon PEA.
- Hixon - includes two long-established employment areas: New Road / Hixon Airfield Industrial Estate (identified as RIE2 Hixon Airfield as shown on Figure 5.1) and Church Lane (identified as RIE1 Hixon and RIE5 Pasturefields as shown on Figure 5.1), comprising older industrial estates with areas of open storage.
- Rural (rest of Borough) - smaller rural estates are dispersed across the Borough, including Raleigh Hall (identified as RIE6 Raleigh Hall as shown on Figure 5.1), and Ladfordfields (identified as RIE3 Ladfordfields as shown on Figure 5.1), along with extra rural employment sites considered in analysis of Moorfields Industrial Estate, Brookside Business Park, Boons Industrial Estate, Cannock Road and Grindley Business Village. Together, these provide small clusters of employment space serving rural settlements.

Figure 5.1 Stafford Borough Employment Areas



Source: QGIS, Stafford Borough Council, Urbà (March 2026)

5.9 The following sections first consider the industrial and warehouse market, outlining its overall characteristics before reviewing each area in more detail. The office market is then addressed separately later in the chapter.

The industrial / warehouse market

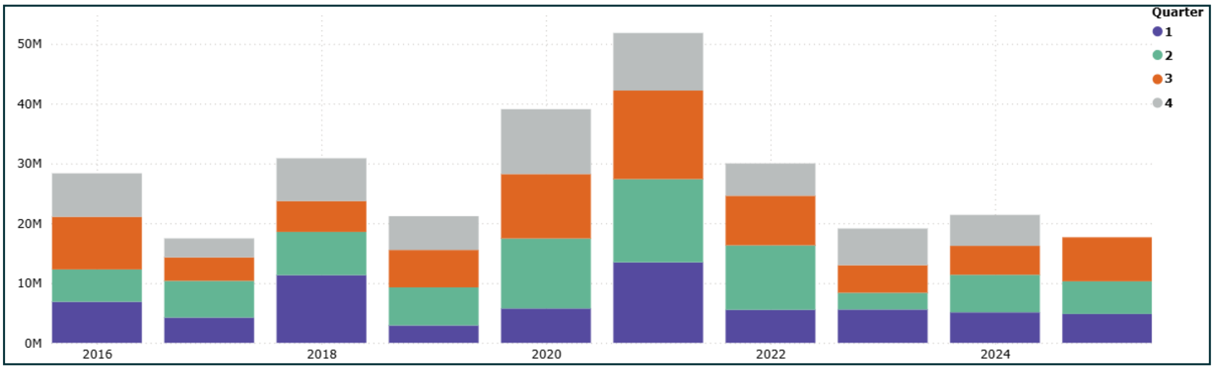
5.10 For market analysis, industrial and logistics uses (E(g) i–iii, B2 and B8) are considered as a single property market. In the Borough, strategic-scale warehousing is used for both manufacturing and distribution, by a mix of nationally mobile ("footloose") occupiers and locally based firms. In practice, these occupiers are generally seeking flexible, modern units that they can configure to suit their operational needs, so the industrial and logistics market are treated as one combined sector and draw out distinctions only where relevant.

General Profile - industrial and warehouse market

5.11 Over recent years, the UK industrial and logistics market has been characterised by strong demand for larger warehouse units (typically 9,290 sq m plus and referred to big box), initially driven by retailers, online sales growth and third-party logistics (3PL) operators. During the pandemic, this segment of the market saw a sharp acceleration in activity as online sales expanded rapidly, and national operators sought additional space to support supply-chain resilience. As shown in Figure 5.2, take-up of strategic-scale units increased significantly over this period before moderating more recently to levels that are broadly consistent with longer-term trends.

5.12 Despite this cooling, demand for large units remains robust, supported by continued interest from retailers and third-party logistics (3PLs), with manufacturing occupiers emerging as a more significant driver of demand in the period following the Covid pandemic. The market is continuing to see occupier focus shift towards modern, energy-efficient buildings capable of meeting higher Environmental, Social & Governance (ESG) standards, such as BREEAM Excellent and EPC A+, within well-landscaped environments that support staff attraction and retention.

Figure 5.2 UK Grade A take-up 9,290 sq m (100,000 sq ft) plus



Source: Avison Young, Big Box bulletin Review of Distribution Activity, Q3 2025

5.13 With regards to the non-strategic industrial and warehouse market (typically below 9,290 sq m and referred to as small and mid-box), the supply of smaller and older units has tightened as poorer-quality stock has been lost to alternative uses such as residential, and very limited new development has come forward. New build in this part of the market has been constrained by weaker development economics: higher build costs, shorter leases and weaker covenants mean developers of small and mid-sized units are generally unable to compete for sites against promoters of big box warehousing, who benefit from economies of scale. As a result, new space has mainly been delivered as infill on existing industrial estates or on greenfield sites that cannot accommodate the footprint of a big box unit. Increasingly occupiers of small and mid-box seeking modern, good-quality space are being seen for the same reasons as with the big box market.

General Profile – Stafford Borough

5.14 Industrial and warehouse premises in Stafford Borough comprise a broad mix of unit types and ages. The stock ranges from large “big box” distribution units, including recently developed facilities near Junction 14 of the M6, to older manufacturing buildings and small and mid-sized units on long-established estates. Recent development has included both strategic-scale warehouses and mid-sized infill schemes, which have helped regenerate parts of the existing stock.

5.15 Large-scale development has been concentrated around Junction 14, where national developers have delivered modern distribution warehouses that reflect the area’s strong motorway accessibility. This has attracted a number of 3PLs and retail occupiers, consistent with patterns seen across the wider market. Small and mid-box development on established estates and smaller sites has supported a diverse occupier base, including manufacturing and engineering activities.

5.16 Across the Borough, industrial estates present a variety of building ages and formats. While some stock is older, much of it remains functional, and the established estates continue to accommodate a mix of local and regional businesses. Traditional industrial uses, including repair, recycling, plant hire and other operational services, remain an important part of the offer, particularly within the long-established Stafford Borough's industrial estates, and continue to play a valuable role.

5.17 Overall, the Borough's industrial and warehouse stock operates across several distinct geographies, offering a combination of motorway-oriented logistics parks, established multi-occupier estates and long-standing manufacturing premises. The following sections review these areas individually.

North of the Borough (Stone & surrounds)

5.18 The industrial and warehouse offer in the north of the Borough is focused on two main industrial areas: Whitebridge Estate and Stone Business Park / Walton Industrial Estate, both located around Stone. In addition, new-build development is coming forward at Indurent Park, Meaford.

Whitebridge Estate / Mount Industrial Estate

5.19 Whitebridge Estate is an established industrial estate located to the north of Stone, with good access to the A34. The estate contains a mix of building ages and unit formats (see examples in Figure 5.3), including older manufacturing units with lower eaves heights and higher site coverage, alongside more modern units with improved eaves and site layouts – thus reflecting a long-standing multi-occupier estate that has evolved incrementally over time.

5.20 Occupiers include manufacturing and production businesses such as Pure CF (furniture maker) in a 1,900 sq m unit, Triflex (manufacturer) and Cornerstone Systems (manufacturer) in a 320 sq m unit, illustrating a mix of production-based activities.

Figure 5.3 Examples of industrial / warehouse units Whitebridge Estate

Whitebridge Way	Centre Road
	

Source: CoStar, Googlemaps (February 2026)

5.21 Mount Industrial Estate is a separate industrial area located to the east of the Whitebridge Estate, the units here are more dated than those found at Whitebridge Estate but nevertheless appear well occupied. Occupiers here are diverse and include Warburtons (food manufacturer) in a 1,900 sq m unit, Lymestone (brewery) and Tower Studios (recording studio).

Stone Business Park / Walton Industrial Estate

5.22 Stone Business Park and Walton Industrial Estate form a single, continuous employment area to the south of Stone, benefitting from good access to the A34 and A51. The area predominantly comprises mid and big box units of varying ages (see examples in Figure 5.4) set within a well-landscaped environment , making it attractive for occupiers. It also includes several land-extensive operational uses, such as the Pirehill Sewage Treatment Works and a Jaguar Land Rover open-storage site, resulting in a mix of standard industrial plots and larger land parcels.

5.23 Occupiers include OwlettJaton (wholesaler) in a 13,000 sq m unit, Blancomet (recycling) in a 4,200 sq m unit, and Talbotts Biomass Energy Systems (manufacturer) in a 2,000 sq m unit.

Figure 5.4 Examples of industrial / warehouse units Stone Business Park / Walton Industrial Estate

Units 1-4 Diamond Way	GXO Stone, Opal Way
	

Source: CoStar (February 2026)

5.24 Overall, the industrial and warehouse offer in the north of the Borough is strong. The area contains a diverse mix of unit sizes and qualities across Whitebridge Estate, Stone Business Park / Walton Industrial Estate, and the newly developed Indurent Park at Meaford. The established estates appear well occupied and should continue to be safeguarded for employment use. While there may be scope for natural regeneration of older stock over the plan period, driven by viable demand, this will not significantly increase total floorspace, and some net loss may occur due to high site coverage in parts of the older estates. The addition of Indurent Park introduces modern mid and big box-format space, adding depth and quality to this area. Open-storage land within the wider area could also offer opportunities for intensification, but this must be approached cautiously, as such land often has important operational value for specific occupiers and plays a functional role within these employment areas.

Indurent Park, Meaford

5.25 Indurent Park is located north of Stone in Meaford. This new industrial and warehouse estate has delivered a range of mid-box units, including M38, a 3,500 sq m unit, and M81, a 7,500 sq m unit. These units are built to a modern specification (see Figure 5.5) featuring cross-docking, 16 metres clear internal height, 55-metre yard depths, and a targeted BREEAM Excellent rating. Quoting rents are approximately £100 psm (£9.50 psf). The park also has the capacity to deliver a single large “big box” unit of up to 59,000 sq m.

Figure 5.5 Examples of industrial / warehouse units at Indurent Park, Meaford

M38	M81
	

Source: CoStar (February 2026)

5.26 Overall, the industrial and warehouse offer in the north of the Borough is strong. The area contains a mix of sizes and quality of units. The estates appear well occupied and should be retained in employment use. There may be scope for further natural regeneration of the older stock over the plan period, for which there is viable demand, but it will not add significantly to the Borough's floorspace, and there may be some net loss due to the high site coverage of some of the older stock. The open storage land could also provide scope to deliver additional floorspace, but this needs to be treated with caution because it has inherent operational value for certain occupiers and underpins the functional role of these estates.

Stafford Town

5.27 Stafford contains the Borough's main concentration of industrial and warehouse premises, distributed across several established employment areas both north and east of the town and close to Junction 14 of the M6. These include large modern logistics sites at Redhill and Mustang Drive, long-standing mixed industrial estates such as Tollgate and Astonfields, expanding modern commercial areas including Beacon Business Park on Weston Road and small estates providing local services such as Tilcon Avenue. Together, these locations provide a broad mix of strategic-scale warehouses, traditional industrial stock and smaller modern infill schemes.

Redhill Business Park / Mustang Drive (J14)

5.28 Redhill Business Park and Mustang Drive form a single, modern industrial and logistics area north of Stafford, close to Junction 14 of the M6. The area comprises a mix of recently developed big-box units and smaller mid-box premises (see examples in Figure 5.6), delivered through successive phases of development.

5.29 The park's proximity to the motorway has attracted a range of national logistics and retail occupiers. These include Pets at Home, which operates a 62,000 sq m national storage and distribution facility, and EGD Logistics (3PL), which occupies a 12,000 sq m unit. Scarlett Court has delivered additional modern small and mid-sized units alongside larger logistics premises.

Figure 5.6 Examples of industrial / warehouse units Redhill Business Park / Mustang Drive (J14)

Stafford 128, Mustang Drive	Scarlet Court
	

Source: CoStar (February 2026)

Tollgate Industrial Estate / Astonfields Industrial Estate

5.30 Tollgate Industrial Estate and Astonfields form a large and long-established industrial area located to the north of Stafford town centre and south of the A513. The estates contain a broad mix of older industrial units, workshops and trade counter units of varying ages and sizes (see examples in Figure 5.7). The physical environment is more traditional than the modern estates at Redhill Business Park and Mustang Drive; however, stakeholder feedback indicates that the quality of the environment here does not deter occupiers, and the estates continue to function well with steady demand.

5.31 The area accommodates several traditional industrial and operational uses, including waste and recycling, scrap metal processing, plant hire, vehicle repair and body shops, all of which provide important local services. A major occupier is Bostik (adhesives) with a 28,000 sq m manufacturing plant. Other occupiers include Rail-Ability (engineering) in a 3,300 sq m unit and Medequip (community equipment supplier) in a 4,100 sq m unit.

5.32 Within Astonfields, Sovereign Court provides a small modern infill development offering new light industrial units typically ranging from 100 to 235 sq m, demonstrating that natural regeneration of the estate is viable.

Figure 5.7 Examples of industrial/warehouse units Tollgate Industrial Estate / Astonfields Industrial Estate

9 – 10 Telford Drive, Tollgate	Scott House, Astonfields
	

Source: CoStar (February 2026)

Beacon Business Park

5.33 Beacon Business Park is located to the east of Stafford, off Weston Road, and comprises the former RAF site. Some of the units are legacy RAF buildings, which results in lower eaves heights and a lack of modern clear-span space compared with purpose-built industrial units (see Figure 5.8). Many of these older buildings have been sub-divided to provide space for small and mid-sized occupiers. More recently, there has been new development delivering small and mid-box units, providing the modern, purpose-built accommodation sought in the market. Occupiers here include Classeq Glass & Dishwashing Systems (kitchen equipment supplier) in a 4,600 sq m unit and Wacker Neuson (construction equipment supplier) in a 4,400 sq m unit.

Figure 5.8 Examples of industrial/warehouse units Beacon Business Park

Unit QA	Beacon Gate
	

Source: CoStar, Googlemaps (February 2026)

5.34 The Stafford Town industrial estates play a complementary role to Redhill / Mustang. They provide a core base for more traditional industries and occupancy is consistently high. Although Beacon Business Park does provide some opportunity for new floorspace to be delivered, elsewhere in Stafford, new floorspace over the plan period, is most likely to be delivered through refurbishment and infill. As with the north of the Borough, this will not add significantly to total floorspace, and some net loss of floorspace is possible due to the high site coverage of parts of the older stock.

Tilcon Avenue

5.35 A small, well-established industrial estate located to the south-east of Stafford, within Baswich. Two sides of the estate are bounded by the canal, with a third side adjoining the railway line. The estate contains a mix of unit types and conditions; although some premises are dated and not necessarily suitable for modern occupier requirements, the estate appears to be well occupied. Current occupiers include Breedon (concrete plant) and TileScapes (trade counter).

Hixon

5.36 Hixon accommodates two substantial, long-established employment areas with a predominantly industrial and open-storage character: New Road / Hixon Airfield Industrial Estate to the north-west of the village, and Church Lane Industrial Area to the south. Stock here comprises a mix of older industrial units with high site coverage, slightly more modern units with good yard space, and small dated workshops - see examples in Figure 5.9.

New Road Industrial Estate / Hixon Airfield Industrial Estate

5.37 New Road Industrial Estate / Hixon Airfield Industrial Estate is a large employment area set around the former airfield and is defined by its unusually extensive yard areas and significant open storage along the old runway. The historic airfield layout results in extensive hardstanding that supports open-storage.

5.38 Occupiers include IAA Stafford (vehicle auction), Midland Portable Buildings (manufacture) in an 8,000 sq m unit and Bulldog Gear (manufacturing/assembly) in a 340 sq m unit.

Church Lane Industrial Area, Pasturefields

5.39 Church Lane is a long-established industrial area containing a mix of larger purpose-built industrial units, such as those occupied by Bri-stor Systems and Alpha Manufacturing, alongside smaller workshop units and space used for open storage. The estate is severed by the railway line, with the western cluster accessed from the A51 and the eastern cluster accessed from Church Lane, with no direct internal connection between the two. This creates two distinct operational areas within the wider estate. Units to the west of the railway line are generally more modern with higher eaves heights than those to the east; however, both areas appear to be performing well.

Figure 5.9 Examples of industrial / warehouse units Hixon

Hixon Airfield	Unit 2 Church Lane
	

Source: CoStar (February 2026)

5.40 The Hixon employment areas perform well and continue to meet operational needs across fabrication, manufacturing and storage-related activities. There is potential for site intensification or infill development, especially where areas are currently used for open storage. However, as mentioned before, open storage itself provides inherent operational value for certain occupiers and underpins the functional role of these estates.

Rural

5.41 Across the rural parts of the Borough there are several small employment areas which provide locally oriented industrial and business units. These sites typically comprise older, purpose built, smaller units, often below 1,000 sq m, and serve businesses operating within nearby villages and rural communities. The following locations represent examples of the types of rural employment areas found in the Borough

5.42 Moorfields Industrial Estate –is a purpose built industrial estate of around 6.5 hectares located in the north-west of the Borough, on the A519, just north of Cotes Heath. The estate comprises around 30 purpose built industrial units set out in terraces along with areas of open storage, with several companies occupying multiple units. Occupiers here include: AirCraft Air Handling (manufacturer) in three units that total 540 sq m and RE Davies (3PL) in four units that total 900 sq m.

5.43 Brookside Business Park – is a purpose built industrial estate of around 8.5 hectares, located in the north-west of the Borough, north-east of Eccleshall, near Cold Meece. The estate was formerly a British Telecom training centre before being converted into a mix of older, purpose-built workshop, light-industrial and office units, along with extensive areas of open storage. Occupiers here include Global Heat Transfer (oil recycling and disposal) and Greenhous (car dealer).

5.44 Raleigh Hall Industrial Estate is an established industrial estate located in the northwest of the Borough, north of Eccleshall. The centre of the estate contains two large cold-store units, with a mix of small and mid-sized purpose-built units surrounding them. Occupiers include Arco Professional Services (safety equipment supplier) in a 2,600 sq m unit, and Polyflon Technology (manufacturer) in a 1,000 sq m unit.

5.45 Boons Industrial Estate – is a small dated industrial estate located west of Stafford, off Derrington Lane. The units appear to be barns converted for industrial use rather than purpose built, because the units do not benefit from roller shutter doors or integrated offices, as would be expected. Occupiers here include Motex Spares (motor spares).

5.46 Ladfordfields Industrial Estate – is a small, dated industrial estate located to the north-west of Stafford, west of Great Bridgeford on the B5405. The B5405 connects to the A5013 at Great Bridgeford, which in turn provides direct access to Junction 14 of the M6. Some of the units have high site coverage for modern occupier requirements, meaning yard space and circulation are constrained in places. Occupiers include the headquarters of Stan Robinson (3PL) and Truss Form (roofing supplier).

5.47 Brocton Business Park is a small purpose built industrial estate located in the south-east of the Borough, on the A34 Cannock Road. Occupiers here include the engineering firms Daro in a 500 sq m unit and Nirvana in a 2,000 sq m unit.

5.48 Grindley Business Village is located in the eastern part of the Borough near the village of Grindley, accessed off the A518. The site was formerly an anaerobic digestion power plant and has since been repurposed to provide a mix of small and mid-sized units alongside areas of open storage. Occupiers here include Lanes for Drains (contractor) and Haddleys Vans (motor dealership).

5.49 The rural employment areas across the Borough continue to perform well, providing an important supply of small, lower-cost industrial and service-based premises suited to local businesses. Although the stock is generally older (and includes legacy buildings), occupancy levels appear strong, reflecting stable demand. These estates play a valuable role in supporting local enterprise and sustaining employment opportunities within rural communities. Retention of these sites in employment use is therefore important.

Need to replace the land

5.50 As mentioned elsewhere in this report there is a question as regards whether established sites, currently in use, should be replaced over the plan period. This is a different point to whether buildings on sites should be renewed. All buildings have a finite lifespan before they should be replaced or renewed. This issue relates to the functional obsolescence of the land.

5.51 Having reviewed the portfolio of land generally it is considered well located and capable of being renewed on site.

5.52 While some more rural sites, including the former airfields, may not be where it is ideally to locate them afresh, they meet a need for lower value, more cost efficient, property than could be secured next to major road junctions for example. They complement the more accessible sites by providing a different qualitative offer and one that is offered at a different price point.

5.53 Although some of these more rural sites; including Hixon and Brookside Business Park have a larger share of open storage uses than those closer to the M6. Open storage, and land for vehicles, is an often overlooked source of demand but is needed for the wider industrial market to function efficiently.

5.54 This assessment does not rule out future 'windfall' losses; at the Borough wide scale it is not possible to consider the merits of individual sites in detail and there may be cases where the planning balance supports a loss of economic space. To address this risk; rather than inflate plan period need it is recommended seeking to 'front load' the plan period supply as much as possible, so that there is ample supply is available from adoption.

5.55 Furthermore, there may be scope to 'intensify' how some of the sites are used and particularly where ground floor uses are dominated by storage and especially car / vehicle storage. The fact land has not been 'decked' for these uses so far most likely reflects the weaker demand for land here than other markets. The economics of investing in deck solutions are outweighed by the ability to secure cost efficient land instead.

Take-up & demand

5.56 In this section the take-up and demand of industrial/warehouse floorspace in the Borough over the last five years is analysed, drawing on the CoStar database. This floorspace take-up is the space that business occupiers move into, in any given year. It takes no account of floorspace vacated as businesses move out or close down. As explained above, Council AMR data is used when assessing need for planning guidance purposes, but CoStar provides more qualitative information that is useful to consider as part of the property market commentary. It also reports leasing details and those moving in / out of the area, whereas the AMR only records the net change in floorspace.

5.57 As shown in Table 5.1 take-up in the five years to 2025 averaged 33,271 sq m per year across 23 transactions. Activity fell sharply in 2023 due to a lack of available units, with only 6,604 sq m transacted across 11 deals, before rebounding in 2024 when new and refurbished space became available. This pattern is characteristic of a tight supply-constrained market, where take-up spikes when new space comes forward.

Table 5.1 Past industrial / warehouse take-up, 2021– 2025, Stafford Borough

Calendar year	No. of transactions	Total floorspace take-up sq m	Minimum floorspace take up sqm	Maximum floorspace take up sq m
2021	29	38,499	56	13,067
2022	32	27,230	16	7,142
2023	11	6,604	101	1,672
2024	20	84,763	46	32,055
2025	25	9,261	67	1,987
Total	*117*	*166,357*		
Ann Average 2021 -25	*23*	*33,271*		

Source: CoStar, Urbà, January 2026

5.58 2024 recorded a significant rise in take-up, with six major transactions accounting for the vast majority of the take up in that year (see summary in Table 5.2), driven by new completions and refurbished units being brought to market, along with a lease renewal. Occupiers were a mix of 3PLs and manufacturers. This take-up indicates when space becomes available, it can be quickly occupied.

Table 5.2 Large industrial / warehouse take-up in 2024 Stafford Borough

Sign date	Address	Floorspace sqm	Tenant	Lease details
30/07/2024	PLP Stafford, Stone Business Park	32,055	CIRRO Fulfilment t/a Super Smart Service (3PL)	Carbon net zero new build, let on a 15-year lease at an asking rent of £90 psm.
04/06/2024	Mustang Drive, jct 14, M6	12,309	Culina Logistics (3PL)	Lease renewal on a 5-year term
01/09/2024	Beacon Rd, Stone Distribution Centre	12,077	Cole Palmer (manufacturer and supplier of laboratory and industrial equipment)	Lease renewal on a 3-year term
01/07/2024	Stafford 128 Mustang Drive, jct 14, M6	11,358	EGD Logistics (3PL)	Logicor refurbished unit, let on a 10-year lease
02/09/2024	DC3 Mustang Dr, jct 14, M6	7,777	GE (electronics manufacturing)	Forms part of an expansion[5]
01/03/2024	ERGO 66, Shackleton Way	6,177	Hill (helicopter manufacturer)	New build unit with EPC Rating A, let 10-year lease at a rent of £90 psm.
Total		81,753		

Source: CoStar, Urbà, January 2026

[5] https://www.tennet.eu/nl-en/blog/ge-vernova-valve-factory-expansion-stafford-uk

5.59 In addition to the large 2024 deals, take-up during the wider 2021–2025 period included regular activity in the small and mid-sized unit market, examples include:

- Sept 25: Liquor License (wholesaler) took a 440 sq m unit at New Road Industrial Estate, Hixon on an undisclosed lease term at a rent of £70 psm.
- Sept 25: SPB (Epwin Group) (manufacturer) took a 300 sq m unit at Brookmead Industrial Estate, on an undisclosed lease term at a rent of £75 psm.
- May 25: Steel Door Company (door supplier) took a 475 sq m unit at Scarlet Court, Redhill on a undisclosed lease term at a rent of £120 psm.
- Apr 25: Hyperlogic (TMT) took a 180 sqm unit at Diamond Business Park, Stone on undisclosed lease terms.
- June 21/Dec 21/June 22: Wells Plastics (manufacturer) took three units of 1,500, 1,615 and 8,860 sq m at Stone Business Park. The larger unit was taken on a 10-year lease and smaller units on shorter term leases ranging between 1 and 5 years.

5.60 Demand for industrial and warehouse space in Stafford Borough is broad-based, with requirements coming from local, regional and national occupiers, with no one sector driving demand.

5.61 Consultation feedback indicates that demand for big box warehousing typically relates to the wider M6 corridor, extending from north Birmingham to Stoke-on-Trent. Occupiers here seek a range of unit sizes, anywhere between 10,000–50,000 sq m. These occupies are prepared to wait for built to suit (BTS) opportunities rather than speculative build to ensure they get a unit which meet their requirements. Requirements typically include 18-metre eaves heights, cross-docking, a well-landscaped environment, and high sustainability standards such as BREEAM Excellent and EPC A+.

5.62 Demand for small and mid-sized units predominantly comes from a range of businesses. Consultation feedback indicates that there are good levels of enquiries for units between 200–1,100 sq m, as well as between the 1,100–1,400 sq m size range. Occupiers in this segment tend to be less sensitive to wider estate landscaping than large logistics occupiers, focusing instead on what is available at that point in time to meet their requirements. Agents indicated that demand is driven by a variety of reasons including, businesses both up-sizing and down-sizing as operational needs evolve.

5.63 Consultations also highlighted that small and mid-sized occupiers are increasingly prepared to commit to longer lease terms — often up to 10 years. This reflects the lack of available stock in the Borough and an understanding that it can take up to two years to find a suitable alternative unit.

Supply and market balance

5.64 Supply of industrial and warehouse space in the Borough remains extremely constrained, with availability driven almost entirely by whether new or refurbished units are delivered. Table 5.3 shows the change in total industrial and warehouse floorspace in the Borough (VOA data) alongside CoStar-recorded vacancy. Table 5.3 shows that total stock has increased steadily in recent years, reflecting the delivery of new development. Despite this growth, vacancy has remained low, rising only in the last two years as new space has come forward. Taking the most recent available CoStar Q1 2025 data (to align with VOA reporting dates), vacancy stands at around 19,400 sq m, equivalent to just over 1% of total stock. When compared against the five-year average annual take-up of 33,271 sq m (Table 5.1), this represents around seven months' supply, indicating a very tight market.

Table 5.3 Change in industrial / warehouse total stock & vacancy rate, Stafford Borough

Date	2021	2022	2023	2024	2025
Total stock sq m 31 March	1,417,000	1,468,000	1,473,000	1,520,000	1,551,000
Change in floorspace sq m		51,000	5,000	47,000	31,000
Change in floorspace %		3.6%	0.3%	3.2%	2.0%
Vacancy Q.1 floorspace sq m	0	961	0	18,641	19,428
% of vacant space against total stock	0.0%	0.1%	0.0%	1.2%	1.3%

Source: CoStar, VOA, January 2026

5.65 It is important to note that this commentary only relates to available floorspace and not to land. This is a vital distinction, particularly for the big box take-up where occupiers are prepared to wait for Build To Suit (BTS) in the current market, therefore a low vacancy rate does not always stimulate development, and there are other factors that need to be considered, i.e. the strength of demand at any given time, and scheme viability. At times in the cycle when demand is strong leading to improved viability, developers will be more aggressive in delivering sites, and will speculatively build (as seen during the Covid pandemic). At other times, such as now, a more cautious approach is taken, and developers are prepared to wait for BTS.

5.66 As part of the market facing consultation, undertaken as part of this study, agents confirmed that many landowners would prefer to wait for a BTS offer as opposed to bringing forward floorspace speculatively.

5.67 In this area the adoption of the Plan for Stafford Borough in 2014 provided 61 ha of new land into the pipeline in addition to the 99 ha of employment commitments (supply totalling to 160 ha) although by 2022 only the power station site remains of any scale. In this assessment, it is important to consider whether land take-up would have been higher had more land been made available in 2014 and how to manage this risk. The aspect is further considered when assessing need in section 6.

Rents, yields and the economics of development

5.68 Consultations indicate strong, viable demand, with new-build big box units likely to require or be quoted at up to £118 per sq m (£11 psf) to support viable development, depending on specification. This represents an increase on previously agreed rents in the Borough, but is now required to enable viable development. Stakeholders explained that investment yields have weakened and build cost have increased in recent years, meaning developers require higher headline rents to maintain viable capital values. This is consistent with Knight Frank's Prime Yield Guide (January 2026), which reports prime distribution yields of 5.0–5.25% and good secondary industrial yields of 6.5–7.0%, reflecting softer pricing compared with earlier years. Due to funding restrictions, developers of big box units are generally waiting for build-to-suit or freehold commitments rather than proceeding speculatively.

5.69 Due to big box development benefits from economies of scale, it can support the delivery of on-site infrastructure, which is not achievable for small and mid-sized units where margins are lower. Despite viability challenges with small and mid-sized units, this type of space is still being delivered in the Borough, typically by investors who are able to take a longer-term view, rather than developers who need to crystallise value at the end of the construction period.

5.70 Secondary rents of around £72 per sq m (£6.75 psf) are considered sufficient to maintain and repair older stock. However, consultation feedback highlighted that rising rents, alongside increasing business rates and staffing costs, are beginning to squeeze some occupiers.

CONCLUSION ON THE INDUSTRIAL / WAREHOUSE MARKET

5.71 The industrial and warehouse market in Stafford Borough is characterised by strong and broad-based demand across all unit sizes, set against a very constrained supply of available premises. Analysis shows that new and refurbished space is quickly taken up, reflecting limited vacancy and long search times for occupiers. Large modern units near M6, Junction 14 continue to attract national logistics and manufacturing firms, while established industrial estates across the Borough remain well occupied and play an important role in supporting local businesses. Although new development has been delivered in all size formats, further growth is will depend on new sites being allocated that align with modern development characteristics, including good motorway access, the ability to accommodate big and mid-box warehousing with 18-metre eaves and cross-docking, and sufficient scale to fund infrastructure and open up land for small and mid-box units. Although the big box market is currently reliant on build to suit opportunities, therefore, reliant on site with allocations or an outline planning permission in place. Locations north of the Borough with good motorway access appear to provide the greatest scope to accommodate these requirements.

The office market

5.72 The office market in the Borough is smaller than compared to the industrial / warehouse market, but space is generally found in all the employment areas considered above and the Stafford town centre.

Office market overview

5.73 Before the Covid pandemic, developers across the UK office market continued to face challenges in securing funding for speculative office construction. Lending conditions remained tight, meaning speculative development tended to occur only in strong, well-established office locations such as London, the Thames Valley, and major regional centres including Birmingham and Manchester. Elsewhere, new development typically required a pre-let to a strong covenant to obtain finance.

5.74 At the same time, occupier preferences were shifting away from out-of-town parks toward town and city centres, driven by workforce priorities around public transport access, amenities, and sustainable commuting options.

5.75 During the pandemic, government working-from-home guidance resulted in widespread under-occupation of office space. Businesses were forced to adopt remote-working models, digital communication tools, and revised operational arrangements in order to maintain continuity.

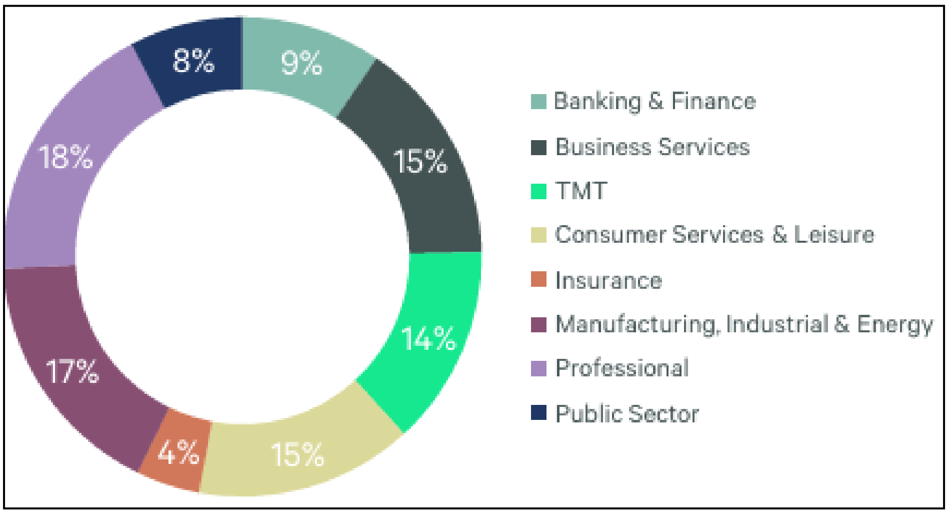
5.76 This period created uncertainty for the future of the office sector, and many occupiers paused decisions on relocations or expansions. As a result, vacancy levels increased in many markets and some occupiers began to reassess the amount of space they required.

5.77 Since 2021, the market has gained greater clarity on how hybrid working has reshaped occupier behaviour. Hybrid working is now a standard feature of most workplace strategies, and occupiers continue to assess their footprints.

5.78 Demand has generally become more focused on smaller but higher-quality units, with strong emphasis on sustainability credentials, energy efficiency, and overall ESG alignment. Better amenity provision and modern design standards have also become key tools for employers aiming to attract and retain staff.

5.79 As shown in the CBRE research in Figure 5.10 the main drivers of demand for new office space have been from professional services, manufacturing, industrial and energy, business services and consumer services and leisure.

Figure 5.10 UK markets take-up by sector, 12 months to end Q4 2025



Source: CBRE Research, February 2026

General Profile – Stafford Borough

5.80 The Borough's office market comprises a mix of town centre offices, including modern purpose-built buildings and older secondary space, and out-of-town business park accommodation largely developed in the early 2000s. Much of this stock is now ageing, with varying levels of specification and condition.

5.81 The town centre provides the highest-quality office accommodation in the Borough, including modern Grade A space such as Staffordshire Place, as well as more modest units in purpose-built blocks and converted buildings. This stock offers good accessibility to services, amenities and public transport, which are important for occupiers seeking to attract and retain staff. Out-of-town locations, such as Staffordshire Technology Park and Anson Court offer traditional two-storey pavilion-style buildings with on-site parking.

5.82 The main office locations in the Borough are:

Stafford town centre

5.83 The town centre contains a mix of office accommodation, ranging from modern purpose-built space to converted buildings and upper-floor offices above retail units. This area provides some of the highest-quality office stock in the Borough, as well as the widest range of supporting services and amenities.

Staffordshire Place

5.84 Staffordshire Place represents the best specification office accommodation in the Borough (see Figure 5.11), comprising modern, purpose-built Grade A space. Specifications include BREEAM Excellent, natural ventilation and thermal comfort features, raised floors, suspended ceilings, and full-height glazing. Space is offered fully fitted, which supports immediate occupation and meets modern occupier expectations regarding workplace quality. Occupiers include Staffordshire County Council (public sector) and Dentsu (marketing agency) in a 990 sq m unit.

The Hollies Complex

5.85 The Hollies Complex provides purpose-built, edge-of-centre offices (see Figure 5.11) with a reasonable specification, including suspended ceilings, recessed lighting, raised floors, comfort cooling and gas-fired radiator heating. While of an older generation, it offers purpose built accommodation with some on-site car parking, and access to the railway station and town centre. Occupiers here include Dove Home Care (care provider) in a 270 sq m unit.

Greyfriars Business Park

5.86 Greyfriars Business Park is a small purpose built office park located just to the north of the town centre. Offices here comprise traditional two-storey, pavilion-style buildings with on-site parking, finished to a similar specification as the Hollies Complex. Occupiers here include AKG Stafford (employment agency) and HMPPS Probation Service (public sector).

Older town centre stock

5.87 Beyond the purpose-built buildings, the town centre contains converted offices and upper-floor units such as those at 7 Mill Street and The Moat House. These offices typically offer basic specifications and smaller floorplates and can appear dated compared with modern standards. However, they continue to provide affordable space for smaller occupiers requiring a central location.

Figure 5.11 Examples of Stafford Town Centre offices

2 Staffordshire Place	The Limes at the Hollies
	

Source: CoStar (February 2026)

5.88 Town centre office areas are performing reasonably and continue to meet a portion of modern occupier requirements due to the quality of stock and proximity to amenities. However, if space is lost, it will not be replaced, as new office development is not viable at current rent levels without public sector support or a pre-let to a strong covenant, both of which are unlikely, therefore the stock needs to be protected.

5.89 As noted earlier the Council has recently commissioned a new Town Centre masterplan that, while emerging, it is understood to have a strong focus on new economic space – offices and E class.

5.90 This approach is firmly supported in principle but, in order to progress through the plan, care is needed to ensure that all relevant landowners endorse any potential land allocations and can see past the short term market signals reported above. In more detail when assessing need, is that it is likely that over this plan period, there will be seen a return to office floor space development as the scope to absorb future office sector job growth by further floorspace efficiencies, including homeworking, becomes limited. As time progresses, post Covid, it is becoming clear that around 2023 was 'peak homeworking' and many firms are now either holding firm on existing homeworking policies or seeking a return to the office. It is unlikely that established patterns will be reversed but there is limited scope to absorb future job growth entirely within the existing stock. How the future office market works in practice remains unclear but there are, compared to the recent and medium past, some signs that more built office floorspace may be required.

Out of town (Technology Park, Anson Court etc.)

5.91 The Borough's main out-of-town office provision is clustered around Staffordshire Technology Park (and nearby schemes such as Anson Court and Beacon Business Park), to the east of the town, adjacent to Staffordshire Police Headquarters.

5.92 The offices here comprise traditional two-storey, pavilion-style buildings with on-site parking, largely built in the early 2000s – see examples in Figure 5.12. Ownership across parts of the Technology Park is fragmented, with some units held in directors' self-invested personal pensions (SIPPs) and leased back to their companies. This pattern of ownership can make long-term estate management more challenging, as it may prevent entire blocks from coming forward for comprehensive redevelopment once they reach the end of their economic life. As a result, outdated and lower-quality accommodation may continue to be marketed rather than replaced. The Council should therefore keep this issue under review, particularly towards the middle and end of the plan period.

5.93 The specification of the units varies at the Technology Park. A proportion of units now show their age (e.g., solid floors, CAT II lighting, no cooling) and are often not brought to market on a refurbished basis, with elements of previous tenant fit-out remaining, which indicates that there is little incentive for landlords to refurbish their space. Agents indicate that headline rents have seen limited movement since the parks were first built, and there is typically some level of availability in these locations at any given time.

5.94 Despite its name the Technology Park has a broad range of occupiers, and not necessarily in technology sector. Occupiers located out of town include AB Energy (TMT) in a 270 sq m unit and Handelsbanken (financial services) in a 118 sq m unit.

5.95 Where space has been refurbished is at The Octagon, Beacon Business Park – this is the former Staffordshire University building that has been repurposed as a business centre, providing flexible space including hot desking and small units from around 10 sq m. The

Octagon provides additional on-site facilities which modern occupiers seek, in the form of a café, gym, social area and conference facilities – thus providing a complementary offer to that found in the town centre.

Figure 5.12 Examples of out of town offices

Cavendish House	Darwin House
	

Source: CoStar (February 2026)

5.96 Out-of-town locations are performing reasonably and continue to accommodate local professional, public-sector and technical occupiers; however, parts of the stock are becoming tired and may not remain suitable over the plan period without targeted investment. If office floorspace is lost, it is unlikely to be replaced at current rent levels.

Rest of the Borough

5.97 Office accommodation is also found in a number of smaller locations across the Borough, including village centres and small rural business environments such as Sugnall Business Centre, Hurricane Court, and offices in Stone and Eccleshall town centres. These locations provide a mix of converted premises, purpose-built small offices, and more basic accommodation.

5.98 Specifications vary considerably, space can range from modern small suites to older, modestly specified converted buildings. These offices primarily serve a localised market, offering flexible workspace to small businesses that do not require proximity to the town centre. Occupiers include organisations such as Paramount Surveyors (professional services) and Centrepoint (charity).

Figure 5.13 Examples of Rest of the Borough offices

Sugnall Business Centre	The Old Vicarage, Stone Road Tittensor
	

Source: CoStar (February 2026)

5.99 These locations are performing reasonably, offering functional space that meets a local need. However, as with the town centre and out-of-town office parks, if space is lost it is unlikely to be replaced, given that new office development is not viable at current rent levels and that refurbishment is only marginal. The continued role of these smaller office clusters will therefore depend on the retention and ongoing management of the existing stock.

Demand & take-up

5.100 In this section there is analysis of the take-up and demand of office floorspace in the Borough over the last five years, drawing on the CoStar database. This floorspace take-up is the space that business occupiers move into, in any given year. It takes no account of floorspace vacated as businesses move out or close down.

5.101 As shown in Table 5.4, office take-up in the five years to 2025 averaged 2,046 sq m per annum across 12 transactions. This reflects a small and locally-orientated market, with most deals involving smaller suites—typically below 250 sq m. Take-up peaked in 2022 and 2023 (over 3,000 sq m per year), before falling back in 2024 and 2025 to around 1,000 sq m, a pattern that appears more linked to availability than to changes in underlying demand.

Table 5.4 Past office take-up, 2021– 2025, Stafford Borough

Calendar year	No. of transactions	Total floorspace take-up sq m	Minimum floorspace take up sq m	Maximum floorspace take up sq m
2021	13	2,070	15	989
2022	17	3,079	31	599
2023	15	3,147	30	836
2024	7	1,015	35	273
2025	7	920	32	268
Total	**59**	**10,230**		
Annual Average 2021 - 2025	*12*	*2,046*		

Source: CoStar, Urbà, January 2026

5.102 Take-up during this period included:

- July 2024: Itelligent-I (TMT) took a 60 sq m unit at Sugnall Business Centre on a 2-year lease at £129 psm.
- February 2023: Galliford Try Infrastructure (professional services) took a 120 sq m unit at Rutherford Court at £91 psm.
- January 2021: Zen Control (TMT) took a 206 sq m unit at Priestley Court, Staffordshire Technology Park on a 5-year lease at £115 psm.
- July 2021: MI Accountancy Solutions (professional services) took a 42 sq m unit at Whitebridge House, Stone on a 3-year lease at £123 psm.

5.103 Consultation feedback indicates that the town centre continues to attract occupiers who value accessibility to amenities, public transport, and higher-quality space. Some past corporate enquiries have considered Stafford town centre because the specification of space, it is more affordable compared to other locations, but ultimately relocating here is dependent on staffing.

5.104 Demand ultimately tends to be from local occupiers seeking between 93 – 465 sq m. Consultations indicate that some occupiers are showing increasing interest in the quality of workspace—including sustainability, wellbeing features and modern fit-out—though awareness and expectations vary.

Supply and market balance

5.105 Table 5.5 below sets out the change in total office stock (source VOA) and the corresponding vacancy recorded by CoStar. Over the five year period, total stock has fluctuated but only marginally, with a small reduction in 2024 and an uplift in 2025. These movements likely reflect incremental losses of older stock and the reclassification of some space, rather than any significant new development.

5.106 The table shows vacancy recorded in Q1 has gradually increased from a negligible base in 2021–2022 to around 6,261 sq m in 2025, equivalent to around 4.6% of total stock. Although the data shows virtually zero vacancy in some years, this is based on Q1 snapshot data and does not imply that the position remained constant throughout the year.

5.107 Furthermore, CoStar does not capture the entire market because not all local agents subscribe to the database. Two relatively large, refurbished office units being advertised elsewhere but not recorded in CoStar are the fourth floor of the Stafford Civic Centre (1,117 sq m) and The Octagon, Weston Road, Beaconside (approximately 2,500 sq m). If these are included in Table 5.5, it increases the vacancy figure for 2025 to 7.3%. It is not proportionate to try to identify every vacant office unit being advertised in the Borough within the limitations of the data source, recognising that cannot be relied upon alone to base the overall findings.

5.108 The vacancy level stated, is consistent with feedback from agents, who report that while there is always some availability, particularly in out-of-town locations, much of it comprises older or non-refurbished space that does not fully meet modern standards. Town-centre buildings generally perform more strongly, with better quality and amenity access, but the stock is limited in size and breadth.

5.109 Cross-referencing the updated vacancy figure of 9,878 sq m—comprising the 6,261 sq m identified in Table 5.5 plus the refurbished fourth floor of the Stafford Civic Centre (1,117 sq m) and The Octagon, Weston, Beaconside (approximately 2,500 sq m)—with the five-year annual average take-up of 2,046 sq m (Table 5.4) indicates that the Borough has a notional supply of around 4 years and 10 months. While this level of availability may appear balanced, much of the vacant stock consists of older or lower-specification accommodation, which offers limited suitability for occupiers seeking modern workspace.

Table 5.5 Change in office, total stock & vacancy rate, Stafford Borough

Date	2021	2022	2023	2024	2025
Total stock sq m 31 March	131,000	131,000	131,000	129,000	135,000
Change in floorspace sq m		0	0	-2,000	6,000
Change in floorspace %		0.0%	0.0%	-1.5%	4.7%
Vacancy Q.1 floorspace sq m	42	153	3,357	5,464	6,261
% of vacant space against total stock	0.03%	0.1%	2.6%	4.2%	4.6%

Source: CoStar, VOA, Urbà, January 2026

Rents and the economics of development

5.110 Office rents in Stafford Borough remain relatively low, reflecting the small and locally-driven nature of the market. Town centre offices typically achieve around £145 per sq m (£13.50 psf) for the best-quality space, while out-of-town locations such as Staffordshire Technology Park generally command £107–£130 per sq m (£10–£12 psf), although these have not moved on since the space was built in the early 2000s.

5.111 Feedback indicated that viable new office development would require rents at least two to two-and-a-half times current levels, broadly £280–£350 per sq m, depending on specification. At present rental levels, refurbishment is often marginal and typically limited to light works rather than full strip out and refurbishment.

5.112 Overall, the economics of development mean that new office development in Stafford Borough is not viable under current market conditions. The Borough is therefore dependent on its existing office stock, with new supply only likely to come forward through public sector intervention, pre-lets to strong covenants, or the re-purposing of existing buildings. Without such measures, the condition of some parts of the stock—particularly out-of-town locations—may deteriorate over the plan period, reducing their suitability for occupiers.

CONCLUSION

5.113 Overall, the office market in the Borough is small, locally focused and characterised by limited take-up, low availability and a strong reliance on existing stock. Activity is driven mainly by local occupiers seeking smaller suites, typically below 250 sq m, with only occasional interest from larger corporate enquiries. Demand includes interest in higher-quality, well-specified workspace, such as sustainability features, wellbeing considerations and modern fit-out, although this is not universal and varies across occupiers. As new office development is generally not viable at current rental levels and refurbishment potential is limited, the future supply of office space will depend largely on retaining and managing existing buildings across the town centre, out-of-town business parks and smaller rural locations. Protecting this stock is therefore essential to meeting ongoing local needs.

5.114 If new office space is required over the plan period, development should be focused on the town centre, because this provides the access to public transport and amenities occupiers seek; however, such schemes are unlikely to come forward on a speculative basis and would therefore require a pre-let or public sector intervention to facilitate delivery.

6 ASSESSING FUTURE NEED FOR EMPLOYMENT FLOORSPACE / LAND

INTRODUCTION

6.1 This chapter assesses the future need for employment floorspace and land in Stafford Borough over the next twenty year 2025-2045 New Local Plan period.

6.2 As discussed earlier, National Guidance is not prescriptive on how the future need for employment land should be assessed, going only as far as identifying the following market signals as suitable for calculating employment need:

- labour demand (based on sectoral and employment forecasts)
- labour supply (based on demographic projections)
- past take-up of employment land / property / property market requirements (data source not specified), and
- knowledge of business trends and changing business models (through market consultation and engagement).

6.3 The first three are broad quantitative approaches that can be used to produce different scenarios of future employment land need in an area. For example, past take-up can be assessed in terms of either floorspace or jobs delivery, and different trend time periods examined to determine a 'best fit' with other market signals to project forward. The fourth approach, engagement with the market is a more qualitative assessment, and is used to determine whether there is scope to accelerate growth in response to changing market trends now and into the future.

6.4 The Guidance also refers to the need to take account of longer-term economic cycles and to consider alternative economic scenarios, and this is done by reviewing as long a term of data as is sensible to do so, and considering sensitivities such as has land been allocated in the past to allow the market to function appropriately.

6.5 Earlier in the report Stafford Borough's economy is discussed in terms of the total number of jobs in the Town (c76,000 as at 2024[6]), and the breakdown of jobs by economic sector using Oxford Economics' 19 broad sectors. However, when identifying future land and floorspace need the assessment has to be done for the specific employment land use categories (the uses identified below), as ultimately land will need to be allocated in the Local Plan for employment uses. The method for 'mapping' across from economic sector to land use category is explained later, but here it is noteworthy that the land uses that are included in the assessment are those directly associated with economic growth:

- offices - E(g)i and E(g)ii activities,
- industrial E(g)iii and B2 combined;, and
- logistics and distribution B8.

6.6 These uses are collectively referred to as the 'employment' land uses, and they generally account for around half of all jobs in an area; the proportion of employment jobs in Stafford Borough's case is 44%. The marginally lower proportion in Stafford town is mainly due to the strength of the public administration and defence sectors that represent one third of

[6] Refer to paragraph 4.14 Source: Oxford Economics employment forecast, October 2025

all jobs in the Borough, which is a much higher proportion compared to the 4% regional figure. Non-employment uses such as defence, academia and health do have land and floorspace requirements, but these needs are identified and planned for through means other than an EDHNA.

6.7 Each of the market signal approaches referred to above are used to identify a number of floorspace / land need scenarios for each of the employment land uses over the plan period. The study includes sensitivity testing by adjusting some of the variables used, for example for past trends, by assessing different past periods. Also, it is possible to also vary employment densities and plot ratios to test plausibility. Regarding the labour supply approach, this report can explore the implications for job numbers of applying different Employment Activity Rates (EARs) linked to new housing mandatory targets. The more quantitative approaches are also considered in the context of business / market trends.

6.8 The scenario outputs are sense tested against the property market assessment discussed earlier in this report, to determine strength of alignment. Broad alignment between the recommended past trends or labour demand approaches and the labour supply scenario is critical to avoid planning for the delivery of more employment floorspace than future labour supply could realistically support.

6.9 This chapter reports on the outputs for all the approaches and scenarios tested in the study, and will conclude on which approach and scenario is the most positive and realistic assessment for each employment land use for the Local Plan to take forward.

6.10 Before considering each market signal approach, firstly the report addresses some of the context and methodological issues that guide the assessment.

West Midlands Strategic Sites Study 2024

6.11 Before considering Stafford Borough it is important to note that a separate strategic study has been undertaken for large scale industrial and logistics needs, which assessed the need for such sites across the whole of the West Midlands.

6.12 That work, culminated in the recommendation that Stafford Borough, as part of a joint Stafford / Stoke-on-Trent strategic market area should accommodate (indicative) two 'large'; sites at c50 ha and 0-1 (i.e. up to one) 25 ha site – both types of sites should be 'blended' – i.e. a mix of B8 and B2[7].

6.13 As set out in that study (para 13.8) the recommendations effectively overlap with the local needs assessment (i.e. this work) and any need for large sites now identified can meet both assessments.

6.14 That study also considered and dismissed suggestions that a 'supressed demand' model, calibrated at 8% vacancy rates and that identified a Stafford Borough need of 200 ha, should be used to assess strategic needs[8]. This assessment is not revisited, nor the approaches tested as the West Midlands Study did not adopt that approach.

[7] Table 12.2 Indicative Site Distribution by Opportunity Area (Ha)

[8] The suppressed demand model has been developed by Savills as an 'alternative' to the common PPG approaches and extensively promoted to councils in support of applications. Here, when tested, Iceni authors of the Strategic Sites study concluded that the core 8% floorspace vacancy rate was not correct and the model exaggerated the need for space in the West Midlands. When tested at 5% vacancy the model generated a need below the past completions trend. A key criticism was that the model ignored the fact

Labour Supply

6.15 The purpose of considering future labour supply is to apply a sense check to the other approached to the assessment of need. The assessment will establish whether there is sufficient labour to meet the various projections of economic growth. The method for assessing future labour supply is set out in Appendix A, and at the end of this chapter the output of the labour supply calculations is discussed and considered in the context of the outputs from the other need assessment approaches considered in this study.

Future working practices

6.16 It has been a long held practice to apply Homes & Communities Agency (HCA) employment densities when undertaking studies of this nature. The HCA employment densities were last reported in 2015[9], but this did not update the underlying surveys which are considerably older. Furthermore, HCA reports densities as Full Time Equivalents (FTEs) and not total jobs, and on the assumption that firms fully occupy the space that they let. In reality, firms do not occupy their space perfectly in line with FTEs and when businesses are asked how many people they employ, or declare their employment on planning forms or statements, it is rare for this to be cited as FTE and more usual in terms of total employment.

6.17 In some activities the use of HCA data can still be supported, the industrial and warehousing densities generally align although there are signs that these densities are changing in response to automation and future Artificial Intelligence (AI). For office, increasingly observed densities[10] are departing from this norm, most obviously post-Covid, where applying HCA densities published in 2015 and relying on much older surveys does not pass a common sense check.

6.18 As regards homeworking most recent thinking, as reported in a recent House of Lords (HoL) report[11] published in November 2025, suggests homeworking has peaked and the homeworking trend appears to have levelled off, with levels of fully in-person, hybrid and remote work all remaining broadly flat. The same report also stresses that firms are increasingly issuing return to work mandates of varying degrees, suggesting a direction of travel back towards a demand for physical office space.

6.19 In this work the observed densities for industrial and warehousing combined as at 2023 was circa 80 sq m per job, and circa 9 sq m per job for office space. The combined industrial is driven by the greater efficiency and large floorspace of modern warehousing which can operate at 90 sq m per job, and has seen the bulk of recent floorspace completions. Therefore, in this work 80 sq m is adopted for the future warehousing space, but default to the 45 sq m /job HCA employment densities for industrial floorspace. For

that, for most very large users, they did not engage in the second hand floorspace market (i.e. the vacancy rate) because they generally looked to a 'design and build' or 'built to suit' option – so for them it is the supply of land that is important and not the supply of floorspace. The model only considers built floorspace.

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

[10] Observed densities are achieved by dividing total office floorspace as recorded by the VOA by an estimate of office jobs based on the economic forecast.

[11] https://publications.parliament.uk/pa/ld5901/ldselect/ldhomework/196/196.pdf

office the 'observed' densities circa 10 sq m / job is adopted as at 2024[12] as this is considered more reflective of post-Covid working.

Margins, Flexibility and need for replacement floorspace.

6.20 There is no formal guidance as to how plans should manage flexibility when calculating need. Some studies add additional years on to the plan period, providing for 25 years to cover a 20 year plan period for example. Others hardwire replacement assumptions to allow for future losses. Both approaches increase 'headline' need.

6.21 As regards additional years –this approach is not supported because it implies a significant share of the 'need' will never be taken up in the plan period. With a 20 year plan period this itself should provide ample flexibility to 'top up' land supply via plan reviews – on the proviso a robust short term supply remains available.

6.22 As regards replacement space; some studies build in an automatic replacement assumption on the basis that industrial units have a finite build life and need to be replaced. While this may be correct this does not mean that the site cannot be redeveloped and the land reused.

6.23 In the more distant past many sites were legacy urban industrial sites and when redeveloped would not be suitable for modern industrial needs. There was some logic in that replacement space would need new sites. Nevertheless, looking forward, and especially over 20 years, a replacement assumption is now increasingly capturing the last generation of large warehousing sites that are often located on the best and most accessible sites because they were the first generation of that need and so has the prime pick of land. A hardwired replacement assumption ignores the quality of the portfolio in question to be redeveloped.

6.24 From assessment of Stafford Borough's portfolio, it does not appear hardwiring in such a margin would be robust. It would, in a Stafford Borough context, mean that the Motorway connected warehouse land would become obsolete towards the end of the new plan period and those sites would need releasing for other uses.

6.25 On an understanding of the Stafford Borough's portfolio, no allowance is built-in to release 'replacement' land and, as with the approach of adding additional years to the calculation encourage front loading of the 20 year plan.

6.26 Should it not be possible to allocate, and front load the plan portfolio, the need for contingency should be considered alongside the development risks of where sites may be delayed.

Industrial Scenarios

6.27 The assessment of industrial need, the core industrial activities and logistics / distribution in warehouses, is reviewed in this section commencing with past trends in floorspace take up, then past jobs delivery followed by labour demand based on the economic forecast.

[12] By observed: Total office sector jobs / VOA office floorspace – 2024.

PAST TRENDS IN TAKE-UP

6.28 The study considers past floorspace delivery in terms of gross and net floorspace completions over a range of periods using the Council's Authority Monitoring Report (AMR) monitoring data. As noted in the introduction, the PPG does not specify how past trends should be assessed, but it is generally accepted that Council AMR Monitoring data is the most up-to-date and reliable source available. The Valuation Office Agency (VOA) floorspace data provides an annual figure for office, and for industrial and warehousing in aggregate, which is useful for an overall sense test, but cannot be interrogated.

6.29 Commercial data sources can provide alternative 'net absorption' estimates (leases in / leases out) but for plan-making this data is behind a 'pay wall' and only available to a small number of specialist firms. Planning data should be transparent and is therefore drawn from council monitoring data – although there are cases where data quality issues mean a greater reliance on commercial data is needed. For Stafford Borough there is sufficient data from the Council to inform this assessment.

6.30 The periods covered are the eleven years since 2014/15 when the current plan was adopted (longest data set), the 8 year 2017/18-2024/25 period, and the most recent five years 2020/21 – 2024/25.

Method

6.31 The first step is an initial 'sieving' and 'cleaning' of the completions data to exclude any duplicate records or temporary employment use schemes and to identify any schemes that 'spike' the data and may / may not 'repeat' in the future. In this context the Pets at Home scheme at Land off the A34 North at Redhill, Stone Road, Stafford is noted, as well as excluding the open storage schemes that have taken place in both Stafford (at Redhill and Beacon) and Jasper Way, Stone. These are excluded because whilst they have a land take, they have not generated a floorspace requirement and are not developed in response to a need to accommodate jobs.

6.32 Next, the annual floorspace completions (gross and net) are calculated for each employment land use category, followed by per annum averages for the trend periods.

6.33 These averages are then applied to the 20 year plan period, with an allowance made to correct for over / under availability in the existing stock as at the 2025 base year, with the data for vacancy sourced from industry provider CoStar. A more detailed method statement is set out in Appendix B.

Output

6.34 The outputs are set out in Table 6. below, firstly individually for each of the eleven years in the 2014/15-2024/25 period, and then the final three rows set out the averages for the three periods.

6.35 The data is net change in industrial and warehousing completions in floorspace and land terms. The floorspace figures are net change i.e. all industrial / warehouse losses subtracted from the gains, and the land hectarages are gross i.e. based on the total site area recorded by the Council, inclusive of land needed for infrastructure delivery to enable these schemes to come forward.

Table 6.1 Stafford Borough – Past trends in employment floorspace completions

	Industrial		Warehouse		TOTAL	
Year	Sq m	Ha	Sq m	Ha	Sq m	Ha
2014/15	14,260	3.7	250	0.4	14,510	4.1
2015/16	4,656	1.3	4,203	1.5	8,859	2.8
2016/17	36,370	9.5	585	0.2	36,955	9.7
2017/18	25,525	7.2	1,546	0.7	27,071	7.9
2018/19	1,041	0.5	3,706	1.5	4,747	2.0
2019/20	5,990	1.8	5,027	2.5	11,017	4.3
2020/21	5,334	1.4	8,540	2.4	13,874	3.8
2021/22	1,224	1.4	7,399	2.0	8,623	3.4
2022/23	1,829	0.6	84,874	33.7	86,703	34.4
2023/24	5,379	2.5	32,284	7.9	37,663	10.4
2024/25	3,738	0.9	2,569	1.8	6,307	2.7
TOTAL	**105,346**	**30.7**	**150,983**	**54.7**	**256,329**	**85.4**
AVERAGES						
11 year average (2014/15-2024/25)	**9,577**	**2.8**	**13,726**	**5.0**	**23,303**	**7.8**
8 year average (2017/18-2024/25)	6,258	2.0	18,243	6.6	24,501	8.6
5 year average (2020/21-2024/25)	3,501	1.4	27,133	9.6	30,634	10.9

Source: Stafford Borough Council Monitoring data and Rapleys analysis

6.36 Key points:

- Warehousing has accounted for over half of all floorspace delivered over the past 11 years. Although more in land terms, but this is largely a product of the Pets at Home scheme that involved a substantial amount of land beyond the immediate site area.
- Over the longer term, and excluding Pets at Home, considerably more industrial floorspace has been delivered.
- The table demonstrates the more sporadic nature of warehousing delivery compared to industrial, and this signals the need for a note of caution when considering the likely frequency of a repeat of larger scale logistics developments.
- The average plot ratios, not shown here, but this being the total floorspace divided by the total land area, are comparatively low set against a national rule of thumb of 35-40%, with 34% for industrial, just 28% for warehousing and 30% overall.

6.37 A 'sense' check on the Council's monitoring data was run to make sure it is reflective of the overall quantum of change, with reference to the official floorspace data published by the VOA that was discussed earlier in this report. The VOA data illustrates the rapid growth in overall industrial floorspace over the past decade with a net increase of circa 300,000 sq m. This shows a good alignment with the total figure shown in the above table, and allowing for differences between the two datasets in terms of definitions and timing that mean the two never totally align.

6.38 Turning to the past trend averages:

- The shorter (five year) average is higher than the longer term averages, chiefly because of the 'spike' in delivery caused by the Pets at Home warehouse (2022/23) in this short run of data, plus the 2023/24 warehousing completion (Super Smart Service logistics) on Brooms Road, Stone on the site of the former data centre. This period is almost all 'Covid' related when the market was significantly disrupted.

- The longer term trends (eight and eleven year) see more of a balance in provision of industrial and warehouse floorspace. The two periods result in very similar level of need.
- As noted above, the two longer trend periods result in a very similar level of need. However, as discussed the Covid years were exceptionally untypical and unlikely to repeat at the same strength looking forwards. The 11 year period slightly dilutes these peak Covid years.

6.39 For these reasons when projecting need forward the longer term eleven year trend is favoured.

Sense checking the trend period

6.40 As part of the market facing consultations tests on whether the analysis of past trends were reflective of the demand for floor space in the past took place, noting that the 2014 (adopted) Plan for Stafford Borough allocated significant new land for industrial that was ultimately taken up in 2022/23. However, since then, in the 2023/24 and 2024/25 take-up has been weak.

6.41 In response, market feedback was that this reflects the market which 'cooled' shortly after 2022/23. Speculative floorspace development stalled as the market absorbed the Covid era development peak[13] and the market moved to a 'built to suit' whereby developers would wait for enquiries to trigger development. The slowdown seen in the data therefore reflects wider market sentiment. Therefore, the projection of past trends appears to be a fair reflection of demand, capturing the ramp up to the Covid peak, reflecting peak Covid delivery years, but also the softening of the market in more recent years.

6.42 The trend period captures, and projects forward, the rise of online retail spend although arguably this assumption is both detrimental to the high street economy and cannot continue unabated through the plan period. As shown in the Strategic Sites work freight / good growth is reasonably modest looking forward, and the demand for floorspace is largely for 'replacement' need where new warehouses replace old, including where older distribution networks distributed to high street stores but may now deliver direct via e-retailing.

6.43 While any assessment of past trends has its shortcomings because it simply projects forward the past, here it is confirmed that the data to project aligns with wider market signals and sentiment is being used.

Calculating future need based on past trends:

6.44 Next, the overall plan period industrial need is calculated (general industrial and warehousing combined). This is shown in the table below by applying the preferred eleven year per annum average (row a in the table below) to the 20 year plan period (row b), and then making the allowance to correct current under-provision in the market (row c), which calculates to almost 100,000 sq m stemming from the very low 1.3% vacancy rate against an optimum rate of 7.5%. An allowance is also made to replace any pipeline

[13] In 2024 take-up and speculative development had fallen below pre-Covid levels: https://www.savills.co.uk/research_articles/229130/376144-0

industrial losses (row d), which in this case are quite minimal reflecting the strength of the industrial market with minimal losses to other uses. Row e sums the total floorspace need and then converts to a land requirement (row f) by applying a 35% plot ratio[14] that reflects a marginal improvement in terms of land use efficiency compared with the 30% Borough average since 2014/15.

Table 6.2 Stafford Borough – Industrial need based on past trends in employment floorspace completions (11 year period 2014/15 - 2024/25)

		Need to 2045
a	Per annum averages (sq m)	23,303
b	Over the period (sq m)	466,052
c	Allowance for current under-supply (sq m)	96,897
d	Re-provision of committed planning permission losses (sq m)	5,464
e	**Total need (sq m)**	**568,413**
f	**Total need (Ha)** *[e/3,500]*	**162**

Source: Stafford Borough Council Monitoring data and Rapleys analysis.

Note: a 35% plot ratio floorspace is applied to calculate the land need from the floorspace totals.

Output

6.45 The findings:

- Based on a past trends period (2014/15-2024/25) total need (rows e and f) is circa 570,000 sq m equivalent to 162 ha over the 20 year plan period.
- In terms of jobs the floorspace / land total need will support circa 7,100 jobs[15]

6.46 In conclusion the future need calculations based on the longer term (eleven year) delivery trends align with the market view of demand in the future, and are therefore considered realistic of future need, with scope to deliver two strategic scale warehouse schemes over the 20 year plan period.

LABOUR DEMAND

6.47 The labour demand approach is based on an economic forecast provided by forecasting house Oxford Economics. The forecast identifies the number of jobs in each economic sector (19 sectors – see raw data at Appendix C) over a time series that looks backwards to 1991 as well as forward to 2050. The forecasting house continually revises the forecast, updating the outturn rate with official ONS published data when this becomes available[16].

[14] Plot ratio is the ratio between total floorspace and site area. To align with the Strategic Sites work and reflecting the nature of the market here for larger warehouse units.
[15] Based on a job density of one job for every 66 sq m. This being the average for industrial (45 sq m /job) and warehouse (80 sq m / job), and applied on a 40:60 ratio as recorded in the delivery of floorspace over the past eleven years.
[16] The key data being ONS Workforce Jobs (WFJ) and BRES, with the WFJ series providing estimates of employee jobs by sector – latest 2024 Q3. OE UK Local Authority District Definitions Note, January 2025

The updating includes revisions to past job numbers at sector level, which means the outturn jobs data for past years are as accurate a reflection of 'actual' data as it is possible to obtain. The latest official data is for 2024, and therefore the Oxford Economics data for that year is the most recent outturn year, and 2025 commences the forecast years.

6.48 As mentioned above, in building the forecasts, the forecaster takes account of data from as far back as 1991, and therefore the longer term forecasts may be less responsive to more recent changes in employment and the local property market. This is why the study uses the time series data to look at different periods in the past to consider shorter / mid-term trends as these can be more reflective of how the more local markets anticipate future change that could continue over the medium and into the longer term. Thus, in addition to the baseline forecast (that supplied by Oxford Economics), it is possible to use market signals (a scenario of need based on past trends in job change) from different past economic periods to project alternative scenarios of future need.

6.49 The other key dataset used in the labour demand analysis is the Business Register and Employment Survey (BRES), a comprehensive survey-based annual sample. It generally accounts for between 85-90% of all businesses / jobs in any area, and is used to calculate the number and proportion of jobs in each economic sector, and to 'translate' jobs by economic sectors to jobs by land use categories. This is done for past years as well as for the forecast years, identifying the number of jobs by land use class in those years and the change between years.

Past jobs delivery

6.50 In addition to testing the job forecast consideration was also given to the rate of past job delivery in the Borough and the implications of projecting that forward. In this regard calculations have been done of the past industrial job delivery in the Borough over the decade 2014-2024.[17]

Method

6.51 The job delivery data originates from the Oxford Economics' economic dataset, which covers job data for years into the past as well as into the future, and this employment sector data needs 'translating' into use classes. As referred to earlier, Rapleys have a tried and tested bespoke method for the 'mapping' of jobs from economic sectors to land uses, in which is assigned a land use category to each of the most fine grained five digit Standard Industrial Category sector codes in the Business Register of Employment Survey data (there are 729 SIC codes), and these are then aggregated to the Oxford Economics economic forecast's 19 broad economic sectors to identify absolute job numbers and the share of jobs by sector and land use category for the start and end years of the trend period 2014 and 2024. This 'mapping' process is explained in detail at Appendix D.

6.52 Once the per annum average job change over the 2014-24 period is calculated, then this is projected over the 20 year period. The floorspace requirement to accommodate these jobs for the 20 years is calculated by applying floorspace density factors for each of the land uses based on HCA Guidance[18] as stated in the table below.

[17] 2024 being the date of the most recent 'actual' Oxford Economics data.
[18] Source: HCA Density Guide 2015 with adjustments to reflect more recent experience. Office E(g)i 10 sq m per job this being the approximate observed local density rather than the HCA 12 sq m / job. Industrial E(g)iii and B2 combined 45 sq m per job, and logistics and distribution B8 80 sq m per job this being the approximate observed local density rather than the HCA 70-77 sq m / job.

6.53 To this new floorspace need two further adjustments are made. Firstly, add a margin (an additional 8.1%[19]) to allow for a little choice and flexibility in the market, and secondly, make an adjustment to bring the availability rate within the existing stock up (or down) to the optimum 7.5% availability / vacancy rate.

Output

6.54 The table below shows the outcome of the 'mapping' exercise, the change in job numbers in the industrial employment land use classes for 2014 and 2024.

Table 6.3 Stafford Borough – jobs in the industrial employment land uses

Industrial jobs	2014	2024	Change	
			2014-24	per ann.
Core	8,512	10,382	1,871	187
Logistics / distribution	6,221	8,188	1,967	197
Industrial total	**14,733**	**18,570**	**3,837**	**384**

Source: Oxford Economics (October 2025) and BRES (latest 2024)

6.55 The above table shows strong industrial job growth over the decade. Overall industrial job growth of circa 400 per annum is strong and not seen in many areas over those years.

6.56 Below, is the calculation of what the floorspace requirements would be if these past rates of job growth were to repeat over the Plan period.

6.57 The floorspace and land use need resulting from these per annum job change averages for both land use categories for the 20 year time horizon is shown in Table 6. below. The gross floorspace need figures in the table include allowances for all the matters discussed above.[20]

[19] The vacancy factor is calculated by adding 8.1% to the occupier demand, that being the proportion required to deliver 7.5% unoccupied floorspace. 7.5% is the industry-wide accepted vacancy rate for a market operating at optimal efficiency. For the vacancy rate to stay at 7.5% over the plan period, for every 92.5 sq m of additional space that will be taken up by occupiers, developers should provide a further 7.5 sq m that will remain vacant. Therefore, developer demand will be 7.5 / 92.5 = 8.1%. above occupier demand. While 7.5% is used here this is, in the current and recent market, aspirational because the market has been running, locally and nationally, at much lower rates and there is some evidence (discussed in the market review) that major investors look for lower levels of vacancy before commuting to deliver new speculative floorspace.

[20] Floorspace densities: office 10sq m/job, industrial 45sq m/job and logistics 73sq m/job (reflective of Regional Distribution Centres rather than more local provision).

Table 6.4 Stafford Borough – future floorspace need 2025-45 (based on past trends in job delivery)

		Core industrial	Ware-housing	Total Industrial	p.a.
a	Jobs change (2025-45)	3,741	3,933	7,675	384
b	Job density factor (sq m GIA /job)	45	80		
c	Occupier need (sq m GIA) [a*b]	168,459	314,648	483,106	
d	Vacancy factor (sq m GIA) [c*8.1%]	13,645	25,486	39,132	
e	Total occupier need (sq m GIA) [c+d]	182,104	340,134	522,238	26,112
f	Existing stock vacancy adjustment (sq m GIA)	48,449	48,449	96,897	
g	**Net need *(sq m GIA) [e+f]***	**230,552**	**388,583**	**619,135**	
h	Re-provision of committed planning permission losses (sq m)	3,598	1,866	5,464	
i	**Gross need (sq m GIA) [g+h]**	234,150	390,449	**624,599**	31,230
j	**Gross need (hectare) [i @35% plot ratio]**	67	112	**178**	8.9

Source: Jobs - Oxford Economics (October 2025) and Rapleys analysis

6.58 As explained earlier[21] to translate industrial jobs (row a) into floorspace (row c) employment densities (row b) are used with an HCA derived average of 45 sq m / job for core industrial (light and general industrial) and an observed 80 sq m / job for logistics/distribution occupying warehousing.

6.59 For industrial uses Table 6. shows:

- projecting forward past delivery of industrial jobs generates a future need for circa 7,700 at the per annum average of 384 (row a).
- Thus, when the job growth over the past decade is projected forward over the 20 year time horizon, converted to a floorspace requirement, and adjustments made to account for current under-supply and re-provision of losses in the pipeline, then the gross need sums to circa 625,000 sq m or 178 ha.
- This level of growth is strong, reflecting market evidence of continuing demand from both core industrial and logistics / distribution operators, particularly the latter for the right type of land in the right location.

6.60 This level of growth would represent a 40% increase in industrial stock over the full 20-year period to 2045.

6.61 Comparing the two assessments above shows a very close alignment between projections based on both past trends in floorspace and in job delivery. Both approaches suggesting that over a 20 year plan period 162-178 ha of new land is needed to accommodate the economic growth potential of the Borough.

LABOUR DEMAND – BASED ON THE ECONOMIC FORECAST

6.62 The scenario above was a labour demand approach based on past trends in job delivery, and this next scenario is a labour demand approach using the economic forecast to 2045.

[21] Explanation paragraph 6.19

6.63 This is based on an Oxford Economics job forecast for Stafford Borough, and establishes the need for additional floorspace / land from the forecast change in job numbers in the Borough over the 20 year Plan period 2025-2045.

Method

6.64 The method is generally the same as that used in the past job trends approach explained above. In summary, job numbers in the economic forecast for years 2025 and 2045 are converted from economic sector to jobs by land use class, based on the latest BRES[22] data for Stafford Borough and Rapleys bespoke SIC to use class mapping method[23]. This mapping will identify the total number of jobs by land use in the Borough in those years, and subtracting one from the other calculates the forecast change in jobs by land use class over the Plan period. The outputs of these calculations for the core industrial activities (light and general) and logistics / distribution are set out in Table 6.5 below. Table 6.6 that follows calculates the corresponding floorspace / land need.

Output

Table 6.5 Stafford Borough – industrial job change 2025-45 - based on the economic forecast to 2045

Industrial jobs	2025	2045	Change 2025-45	Change per ann.
Core	10,494	10,805	311	16
Logistics / distribution	8,242	10,067	1,825	91
Industrial total	**18,736**	**20,872**	**2,135**	**107**

Source: Oxford Economics (October 2025), BRES and Rapleys analysis

6.65 The table shows that there are more industrial jobs (core industrial) than logistics and distribution jobs, but by 2045 the forecast suggests there will be a much closer balance.

6.66 The 107 per annum (pa) overall industrial jobs growth rate is far slower than seen over the past decade. This is likely to reflect Oxford Economics forecast takes account of a longer time series of data and a less buoyant economic outlook.

6.67 The floorspace needed to accommodate these jobs (row a, of Table 6.4) is calculated by applying a floorspace density (row b) specific to the particular land use class, a margin is added to allow for some choice and flexibility (row d), and an allowance made to adjust for any under / over availability in the existing stock (row f). The net need is grossed up by making an allowance to replace known committed planning permission losses.

6.68 Next, the forecast job change data is used to estimate future floorspace need. The table calculates the 20-year Plan period forecast based need explained below.

[22] Latest BRES is for 2024

[23] This 'mapping' process is explained above at paragraph 6.51

Table 6.6 Stafford Borough – Industrial floorspace need 2025-45 based on the economic forecast

		Core industrial	Ware-housing	Total Industrial	p.a.
a	Jobs change (2025-45)	311	1,825	2,135	107
b	Job density factor (sq m GIA /job)	45	80		
c	Occupier need (sq m GIA) [a*b]	13,986	145,969	159,955	
d	Vacancy factor (sq m GIA) [c*8.1%]	1,133	11,824	12,956	
e	Total occupier need (sq m GIA) [c+d]	15,119	157,793	172,912	
f	Existing stock vacancy adjustment (sq m GIA)	48,449	48,449	96,897	
g	**Net need *(sq m GIA) [e+f]***	**63,567**	**206,241**	**269,809**	
h	Re-provision of committed planning permission losses (sq m)	3,598	1,866	5,464	
i	**Gross need (sq m GIA) [g+h]**	**67,165**	**208,107**	**275,273**	**13,764**
j	**Gross need (hectare) [i @35% plot ratio]**	**19.2**	**59.5**	**78.6**	**3.9**

Source: Oxford Economics (October 2025), BRES and Rapleys analysis

6.69 The table indicates:

- The total plan period forecast for industrial and warehouse jobs in Stafford Borough is for growth of circa 2,100, which will require circa 275,000 sq m equivalent to 79 ha
- The per annum average gross need at circa 14,000 sq m is less than half the comparable figure for the past trend scenarios.

6.70 This level of growth would represent a 17% increase in industrial stock over the full 20-year period to 2045.

6.71 This is lower than the analysis of past trends and would suggest the forecasters think there will be a slowdown in floorspace delivery over the plan period. There is some merit in this if the growth in warehouses seen within the trend period will not repeat – i.e. the switch from high street retail to e-commerce is now largely complete, and major retailers have reshaped their networks to respond. However, the major concern with this approach is that a slowdown, compared to past trends, does not reflect current market sentiment.

6.72 There is broad market agreement that peak warehouse delivery has passed, but the market does not suggest a major slowdown that would be implied if only 3.7 ha of new land was provided each year. Further, as discussed below, Stafford Borough when responding to delivering full Standard Method homes, will provide above trend housing delivery and possibly above trend labour supply increases.

6.73 A number of different approaches to the assessment of the need for future industrial need in Stafford Borough have been reviewed. First a review of past trends in floorspace delivery, where consideration of floorspace completions over different trend periods occurred, then past delivery of industrial jobs in the Borough, before reviewing labour supply and labour demand based on an economic forecast.

6.74 The findings show that both past trends scenarios, jobs and floorspace (over longer term scenarios) closely align with a range between circa 162 ha – circa 178[24]ha needed for industrial uses over the full 20 year plan period. Job change in the economic forecast

[24] Note – when converting floorspace into land it is assumed a 35% plot ratio. When allocating land, site constraints or opportunities need to be considered, and this assumption may need to vary. Note when considering land South of Stone, already knowing significant constraints the floorspace figure from the site promoter and adjusted the land ha (for only this site) has been used.

suggests a slowdown in job creation leading to a land requirement for 75 ha, half that of the other approaches, but as noted above this does not align with the wider basket of market signals. In addition, the risk that, as Ai and automation may break any established relationship between jobs and floorspace with new floorspace still needed to manufacture, store or distribute goods is not considered. The assessment clearly points to the past trends approaches most closely aligning with market sentiment, and it is recommended that the Local Plan sets the upper end (178 ha) of this narrow range as the minimum delivery for the Borough to 2045.

6.75 The scale and qualitative nature of these recommendations would appear to align with the Strategic Sties work. In qualitative terms high quality access to the M6 drives demand for space in the Borough and should be the priority; noting that the Strategic sites work suggests up to two new large strategic sites in this market area (including Stoke on Trent) and a smaller (25 ha versus 50 ha) less strategic scale site.

Office Scenarios

6.76 Following the same general approach taken in respect of industrial need the need for office floorspace in Stafford Borough is now considered. Below is firstly a report on the past trends approach reviewing floorspace completions, and then the labour demand approach that is based on an economic forecast.

PAST TRENDS

6.77 First, there is a review of the annual net change in office floorspace completions in Table 6.7 below.

Table 6.7 Stafford Borough – Past trends in office floorspace completions

Year	Net change Sq m
2014/15	1,215
2015/16	740
2016/17	100
2017/18	200
2018/19	1,838
2019/20	139
2020/21	658
2021/22	-107
2022/23	1,230
2023/24	-2,386
2024/25	-348
TOTAL	**3,279**

AVERAGES

Trend period	Per annum average Sq m
11 year average (2014/15-2024/25)	**298**
8 year average (2017/18-2024/25)	153
5 year average (2020/21-2024/25)	-191

Source: Stafford Borough Council Monitoring data and Rapleys analysis

6.78 The only pattern in the eleven years of data is that the annual change is always very modest and was until the last four years generally positive, but with a very narrow range. This marginal change is consistent with the very low number of schemes coming forward and the VOA data previously discussed that shows the Borough's office stock has been 'flat lining over the past decade. While no growth in over a decade is not good for an economy, as discussed earlier this 'flat lining' has been at a time when most areas experienced significant reductions in office stock, and England as a whole lost 11% of its office stock.

6.79 With low levels of office completion rates, the period averages (right hand table above) are therefore correspondingly low with the 11 year trend period average, a gain of 298 sq m / annum being the most positive.

6.80 Next, the office floorspace trend average is projected forward. This is done for two periods, a NPPF compliant 10 year[25] for assessing the need for office (2025-2035), and a full plan period 20 year (2025-2045) projection. Projecting for such a range reinforces the view that while there may be short term viability and delivery challenges, the Plan must consider requirements over the mid and long term.

6.81 In terms of the method, this is the same as for the assessment of industrial need. In addition to the growth related to the past trend an allowance is made to correct for current under-provision (vacancy currently 4.6%), which is below the 7.5% experienced in an optimally functioning market. This allowance calculates to the 3,864 sq m identified at row c in the table below. Then an allowance is added for the re-provision of known committed office losses in the planning pipeline (planning permissions that will result in the loss of office), and this is the modest figure set out in row d of the table.

Table 6.8 Stafford Borough – Office floorspace projection (based on past trends in completions)

	Projection period	10 years	20 years
a	Per annum averages (sq m)	298	298
b	Over the period (sq m)	2,981	5,962
c	Allowance for current under-supply (sq m)	3,864	3,864
d	Re-provision of committed planning permission losses (sq m)	2,791	2,791
e	**Total need (sq m)**	**9,636**	**12,617**

Source: Stafford Borough Council Monitoring data and Rapleys analysis

Output

6.82 Key points are:

- The low per annum completions trend average produces a modest per annum office need – in rounded terms between 10,000 – 13,000 sq m.
- Given the current total office stock is 135,000 sq m[26] this level of need represents a 7-9% increase in stock.

6.83 This range of growth over 10 and 20 years, based on the past decade of largely inactivity, is considered modest.

[25] NPPF December 2024 paragraph 90d – the need for town centre uses
[26] Source: VOA

LABOUR DEMAND

6.84 This section provides, a review of the labour demand approach. First, office job change in the past is reviewed, looking at change in the decade (2014-2024). Again, this is based on the historic data in the economic forecast, after which a review of the economic forecast is undertaken.

6.85 The assessment provides s an overall 'office' need, and also disaggregated between general office jobs and jobs of a more Research & Development (R&D) nature such as those at the Technology Park. This is achieved via interrogation of BRES data at the five digit Standard Industrial Classification (SIC) code level to identify SICs associated with R&D activity[27]. A number of the SIC codes are industrial in nature, but the R&D activities are undertaken in specialist hybrid space that is more akin to office than factories. As discussed earlier the R&D market in Stafford Borough has been 'difficult' in recent years, and job numbers have declined. Given that general office and the more technological R&D activities require similar 'office' type space the need for this is combined– and referred to below as office floorspace need.

Past jobs delivery

6.86 The table below shows office jobs in 2014 and 20214 split by use class (office (E(gi) and R&D E(gii)) and then combined.

Table 6.9 Stafford Borough – Office job change (2014-24)

Office jobs	2014	2024	Change	
			2014-24	per ann.
Office	8,483	10,724	2,241	224
R&D	4,620	3,911	-709	-71
Office total	**13,103**	**14,635**	**1,532**	**153**

Source: Oxford Economics historic economic data (October 2025) and Rapleys analysis

6.87 The table above shows that overall office and R&D jobs in Stafford Borough increased by circa 1,500 over the decade, averaging 153 pa. In the context of an office economy supporting almost 15,000 jobs this represents a circa 1% per annum growth.

6.88 As previously discussed such a growth in office numbers has not led to a corresponding increase in office floorspace. There are two reasons for this, firstly the tightening office floorspace densities (moving from 10.6 sq m / job in 2014 to 8.8 sq m / job in 2024) show that some of the increase has been absorbed into the existing stock, with in some cases general office replacing R&D that operates at a lower floorspace density, and the other reason being the growth in homeworking.

6.89 There will come a point when office job densities can no longer improve (8.8 sq m / job is already a relatively high density) and for the office jobs to be accommodated in the Borough additional office floorspace will be required. For this coming plan round, positive planning requires that future growth in jobs is planned through growth in office floorspace. Hence the table below calculates office floorspace need on the basis of past office jobs growth, assuming all new jobs will require new floorspace. Adjustments for market signals

[27] This process is explained at Appendix D - Sector to land use mapping

– relatively low levels of stock availability / vacancy and reprovision of any committed stock losses need to be factored into years 1-10. The vacancy factor (row g) is based on a 4.6% 2025 vacancy rate which is 3% below the 7.5% optimum, and set against a total stock of 135,000 sq m generates a replacement adjustment of ~4,000 sq m. This stock vacancy adjustment is a general rule of thumb, and therefore aware that office markets are operating perfectly well with vacancy rates well below 7.5%. Thus, the need for such an adjustment may not arise until the mid-longer term. The re-provision figure (row j) is based on known planning commitments resulting in what are likely to be occupied office floorspace losses needing to be replaced. The same logic as that explained above for the vacancy margin applies here, as the lost floorspace will only need replacing where jobs have been displaced. Thus the inclusion of a re-provision figure as the assessment does presents a worst case scenario.

Table 6.10 Stafford Borough – Office floorspace projection 2025 / 2045 – based on past job change (2014-2024)

		Years 1-10	Years 11-20
a	Projected per annum job change (based on past change)	153	153
b	Jobs change (2025-35 and 2035-45)	1,532	1,532
c	Density factor (sq m NIA /job)	10	10
d	Occupier need (sq m NIA) [a*b]	15,316	15,316
e	Vacancy factor (sq m NIA) [c*8.1%]	1,241	1,241
f	Total occupier need (sq m NIA) [c+d]	16,556	16,556
g	Stock vacancy adjustment (sq m NIA)	3,864	
h	**Net need (sq m NIA) [f+g]**	**20,420**	**16,556**
i	**Net need (sq m GIA) [h/0.85]**	**24,024**	**19,478**
j	Re-provision of committed planning permission losses (sq m)	5,406	
k	**Gross need (sq m GIA) [i+j]**	**29,430**	**19,478**
	As a proportion of existing stock	22%	15%

Source: Oxford Economics historic economic data (October 2025) and Rapleys analysis

6.90 Office densities are provided by the HCA as Net Internal Areas (NIA), and because planning works on a Gross Internal Areas (GIA) basis, floorspace figures is converted from NIA to GIA by increasing the floorspace by 15%, in line with HCA Guidance.

Output

6.91 Key points are:

- If future office need were to be based on providing space for the past delivery of office type jobs in full, then office floorspace need would be ~30,000 over the first ten years, with an additional ~20,000 sq m in the second half of the plan period, in total this would represent an increase in stock of over one-third (37%).
- The market review suggests that such a level of growth appears unrealistic.

Labour demand – based on the economic forecast

6.92 Next, the economic forecast scenario is reviewed. This is Oxford Economics' forecast for the 2025-35 (first 10 years) and 2035-45 periods (second 10 years). The table below sets out the number of jobs in office and R&D activities and then the combined office total.

Table 6.11 Stafford Borough – Forecast office job change

Office jobs	2025	2035	Change		2045	Change	
			2025-35	per ann.		2035-45	per ann.
Office	10,832	11,671	839	84	11,960	290	29
R&D	3,890	4,195	306	31	4,290	94	9
Office total	**14,721**	**15,866**	**1,145**	**114**	**16,250**	**384**	**38**

Source: Oxford Economics (October 2025), BRES and Rapleys analysis

6.93 Compared with the past the forecaster predicts a slowdown in office job growth, with rates of for the first decade 114 additional jobs pa, slowing considerably in the second half of the plan period to just 38 jobs pa, compared to 153 jobs pa in the immediate past.

6.94 The table below adopts the forecast rate of growth and calculates the corresponding floorspace requirement, applying the same market signal logic as discussed above.

Table 6.12 Stafford Borough – the need for office floorspace 2025-2035 / 2045 -based on the economic forecast

		Years 1-10	Years 11-20
a	Projected per annum job change (based on economic forecast)	114	38
b	Jobs change (2025-35 and 2035-45)	1,145	384
c	Density factor (sq m NIA /job)	10	10
d	Occupier need (sq m NIA) [a*b]	11,447	3,840
e	Vacancy factor (sq m NIA) [c*8.1%]	927	311
f	Total occupier need (sq m NIA) [c+d]	12,374	4,151
g	Stock vacancy adjustment (sq m NIA)	3,864	
h	**Net need (sq m NIA) [f+g]**	**16,238**	**4,151**
i	**Net need (sq m GIA) [h/0.85]**	**19,104**	**4,884**
j	Re-provision of committed planning permission losses (sq m)	5,406	
k	**Gross need (sq m GIA) [i+j]**	**24,510**	**4,884**
	As a proportion of existing stock	19%	4%

Source: Oxford Economics (October 2025), BRES and Rapleys analysis

Output

6.95 Key points are:

- The economic forecast identifies a need for ~25,000 sq m over years 1-10, with a per annum job growth forecast higher than over the longer term (114 vs 38 pa), and the adjustments to account for the market signals. As referred to earlier there is uncertainty as to what period these adjustments are most appropriate. Many markets are operating efficiently at comparatively low availability rates (sub 7.5%) and some of the lost office floorspace will not have been occupied. The office floorspace need over the second half of the period to 2045 is based solely on job change and generates a need for only ~5,000 sq m..

- Over the full plan period this level of growth (~30,000 sq m) is equivalent to a 22% uplift on the current floorspace stock.
- These scenarios, treated as minimums broadly match what the market indicates is realistic and deliverable.

SUMMARY – OFFICE NEED

6.96 A number of different approaches to the assessment of office need in Stafford Borough have been reviewed, including past trends in floorspace delivery, which identified a very modest level of need, then past delivery of office jobs, which if projected forward and if all those jobs required new floorspace (as opposed to being absorbed into existing floorspace) would require a third more office floorspace than the current stock, and this does not pass the market review 'sense test'. Finally, a review of the labour demand view of future need over the plan horizon based on the economic forecast, and this most closely matched the market sense test. Thus, subject to the final sense test (the labour supply approach), the economic forecast indicates that 25,000 sq m of office floorspace is needed to year 10 of the Local Plan period, with a further ~5,000 sq m needed to the end of the Plan period. The lower need figure in the second half of the plan period is because forecast job growth slows considerably and no adjustments are made for market signals or to address any imbalances in the market. The higher 0-11 year quantum should be addressed these issues.

6.97 For the Council it is important to recognise that any office provision is hard to secure in the current market. With a number of major economic shocks in the recent past developer confidence to promote new space, even when vacancy rates are low, makes it hard to identify a pipeline. Following the 2024 NPPF, the Council should focus on a quantified supply of 1-11 years with later plan years aspirational in the current market. With a negative pipeline and lack of fluidity in the occupier market there is a need to provide a short-term supply as far as possible. However the critical issue is being able to direct interested parties to a land supply at the point development becomes viable rather than focus on the traditional planning permission pipeline of permissions and robust site-specific land promotion.

CONCLUSIONS ON NEED FOR INDUSTRIAL AND OFFICE FLOORSPACE / LAND

6.98 Here the need assessment covered above is summarised and then it is considered whether the labour supply position modifies this in any way.

Industrial floorspace need

6.99 The Borough has seen relatively high levels of industrial floorspace development over recent decades, averaging around 8 ha per annum, with warehousing for logistics and distribution activity being particularly active in recent years.

6.100 This assessment has considered past trends in floorspace development and past delivery of industrial jobs, and based on these trends, over 10/11 years, the range of need identified is 570,000 – 625,000 sq m (or 162 – 178 ha), thus a fairly close alignment. In contrast, and in alignment with what is commonly seen elsewhere, the economic forecast delivers a much lower assessment of need 275,000 sq m or 79 ha. A disconnect has developed between industrial jobs and industrial floorspace, and this leads to assessments of need that do not pass the market sense test, and needs to be set aside as they would otherwise constrain the Borough's future economic growth.

6.101 Subject to the last, labour supply sense test, it is recommended that the higher of the trends range is progressed which is the job delivery based industrial need for 625,000 sq m (or 178 ha).

Office floorspace need

6.102 Clearly under short-term market signals there is little market appetite or need for new office floorspace, and rents are far from levels that would make development deliverable. However, over the mid-to longer term, with office floorspace job densities already at high levels, and if the relatively low office stock availability rates (4.6%) remain low, then there is the prospect of office development turning viable.

6.103 Thus, with negative past trends, the only positive approach to assessing need is through the economic forecast, and this is recommended to set a realistic minimum for future office floorspace need. The forecast suggests a modest level of office floorspace need that, with the inclusion of adjustments for market signals sums to ~25,000 sq m up to year 10, with job growth slowing thereafter to deliver additional need for just 5,000 sq m so 30,000 sq m over the full 20 year plan period to 2045.

6.104 This range broadly aligns with the Stafford town centre master-planning office quantums (circa 15,000 sq m), and allows for modest growth in Stone and the provision of office based employment as part of the more strategic scale mixed use schemes that may come forward through the new Local Plan.

LABOUR SUPPLY

6.105 As a final sense check before concluding, a comparison is undertaken between the number of jobs flowing from the labour demand (for offices) and past trends (for industrial), compared with the possible future labour supply derived from the Standard Method.

6.106 As noted in Appendix A there are major caveats associated with the labour supply analysis, but it is estimated that, should Stafford Borough deliver the Standard Method in full, and discounting for double jobbing[28] its labour supply may increase by around 14,490 workers.

6.107 Comparing this Standard Method generated labour supply 14,490 worker figure with the assessment of need reported in this chapter, it is projected that:

- the industrial need identified - 625,000 sq m (or 178 ha) based on a past trend scenario (past trends in job delivery – refer to Table 6. above) will generate 7,700 core industrial and warehousing jobs.

[28] Where workers have more than one job

- the 27,000 sq m of office floorspace need identified is based on a need for 1,500 new jobs (refer to Table 6. above).
- In addition to the jobs in these employment sectors there are many other jobs in what are referred to as the non-employment land classes[29] , which based on the economic forecast is estimated to number 4,000.

6.108 Therefore, the preferred scenario over the twenty year Local Plan period to 2045 generates a minimum increase in total jobs of 13,200 jobs (the sum of the industrial, office and non-employment activities discussed above), and so marginally less than the 14,490 that would be delivered through full delivery of the Standard Method. This suggests a reasonable alignment between the assessment of economic need and proposed / potential housing delivery.

[29] Non-employment use classes are jobs in sectors such as Education, Health, Retail.

7 THE SUPPLY OF EMPLOYMENT LAND

INTRODUCTION

7.1 This section quantifies the amount of currently committed or potentially suitable employment floorspace / land available to help meet the identified need for employment space over the 2025-2045 plan period.

7.2 Due to the scale of industrial need, 625,000 sq m equivalent to 178 ha, this is the primary 'need' consideration. The office need for 30,000 sq m over the lifetime of the Plan is also addressed,, and as previously reported this will largely be met from sites within Stafford town centre.

7.3 This review can only provide a broad indication of available supply, as there can be no absolute certainty that all planning permissions will be implemented, all allocations taken up or all sites with potential come forward and be developed over the Local Plan period.

7.4 A relevant point to note in terms of supply is that even if schemes are not implemented and may lapse, the land / site remains employment sites have very specific locational characteristics, so although sites suitable for employment uses may not be implementable now, they may well return at a later point in the economic cycle.

Industrial land supply

7.5 Known committed industrial floorspace / land supply currently comprises of:

- land with planning permission for employment use (either in whole or as part of mixed-use schemes)
- land within designated employment areas/ allocations.

7.6 The other source of supply that are considered here are sites that have been promoted through the Council's Call for Sites, including the latest 'Call' reported upon in November 2025. These carry more risk than the committed sites, and hence are considered as a third category of land, but they do have willing owners, and this study has considered that from an employment perspective to be attractive for employment uses and they are therefore strong candidate sites.

Land with planning permission

7.7 Sites that are either currently under-construction or benefit from planning permission for industrial uses are listed in Table 7.1 below. The table identifies three categories of use, the third being where the permission was flexible, and provides the land and floorspace quanta in each case and in total.

7.8 General points in relation to **Error! Reference source not found.**:

- There are 30 schemes on the schedule, 12 of which are for over 1,000 sq m of floorspace.
- Of the total circa 160,000 sq m of floorspace, the permission at the former Meaford Power Station (97,000 sq m) accounts for 60% of the total.

7.9 The permissions are distributed widely around the Borough, with relatively little remaining in the Stafford Town urban area.

Table 7.1: Stafford Borough – land promoted for employment use

		Industrial		Warehouse		Flexible		Total Ha	Total Sq m
PA ref:	Sites with permission	Ha	Sq m	Ha	Sq m	Ha	Sq m		
21/35159/OUT	Former Meaford Power Station Meaford Road Meaford Stone Staffordshire St15 0Uu					11.7	96,932	11.7	96,932
19/31520/REM	Land Off New Road Hixon Stafford Staffordshire					7.0	23,194	7.0	23,194
19/29954/OUT	Land At Air & Ground Aviation New Road Hixon Stafford Staffordshire					4.4	7,370	4.4	7,370
24/39402/FUL	Plot 17 Beacon Business Park Weston Road Stafford Staffordshire	0.6	5,601					0.6	5,601
24/38969/FUL	Ge Grid SolutionsRanshaw DriveStaffordStaffordshireSt17 4Fd	0.5	5,081					0.5	5,081
24/38739/REM	Land West Of Raleigh Hall Industrial Estate Sturbridge Lane Eccleshall Stafford Staffordshire St21 6Jl					0.5	4,854	0.5	4,854
21/35327/FUL	Site B Mod Stafford Beaconside Stafford Staffordshire St18 0Aq					0.3	2,813	0.3	2,813
22/35530/FUL	Land Adjacent Units A1-A5 Douglas Park Stone Business Park Opal Way Stone Staffordshire St15 0Yj					0.2	1,802	0.2	1,802
19/31434/COU	Former Alsthom Building Glover Street Stafford Staffordshire St16 2Ny			0.2	1,700			0.2	1,700
22/36125/FUL	Air And Ground Aviation Ltd London Road Shirleywich Stafford Staffordshire St18 0Pn			0.2	1,655			0.2	1,655
23/37636/FUL	Land Adj To Dc1 Sleeper Spinney Shackleton Way Stafford Staffordshire St16 1Gy	0.1	585	0.1	585			0.1	1,170
23/38311/FUL	Ge Grid Solutions Ranshaw Drive Stafford Staffordshire St17 4Fd	0.1	1,082					0.1	1,082
20/33524/FUL	Land Off Beacon Way Stafford Staffordshire St18 0Dg			0.1	994			0.1	994
24/39429/FUL	Unit P Beacon Business Park Weston Road Stafford Staffordshire St18 0Wl			0.1	564			0.1	564
19/30849/FUL	Castlewood Trading Estate Uttoxeter Road Chartley Stafford Staffordshire St18 0Lp					0.0	455	0.0	455
21/34498/PAF	Hill Top Farm Stone Road Yarlet Stafford Staffordshire St18 9Sd	0.0	380					0.0	380
20/31923/COU	Izaak Walton Golf Club Eccleshall Road Norton Bridge Stone Staffordshire St15 0Bz	0.0	324					0.0	324
22/36323/FUL	Highlows Farm Highlows Lane Yarnfield Stone Staffordshire St15 0Np			0.0	300			0.0	300
22/35843/FUL	A-Z Motor Spares Ltd Unit 2 St Albans Road Stafford Staffordshire St16 3Dr	0.0	288					0.0	288
22/35884/FUL	Land Adjacent Unit N Beacon Business Park Beacon Way Stafford Staffordshire St18 0Wl					0.0	287	0.0	287
24/39020/FUL	Eurofit Greyfriars Stafford Staffordshire St16 2Sa					0.0	264	0.0	264
24/38626/FUL	Land Off Common Road Industrial Estate St Albans Road Stafford Staffordshire St16 3Dp					0.0	232	0.0	232
22/35643/FUL	Walton House Farmhouse Common Lane Stone Staffordshire St15 0Bx			0.0	221			0.0	221
23/38354/FUL	Railway Crossings Station Road Barlaston Stoke On Trent Staffordshire St12 9Dq	0.0	149					0.0	149
20/32598/FUL	Standon Hall Maer Lane Standon Stafford Staffordshire St21 6Ra			0.0	140			0.0	140
21/33967/FUL	Land Between Unit 9 & Unit 13 Whitebridge Industrial Estate Whitebridge Way Stone Staffordshire St15 8Jt	0.0	130					0.0	130
19/30916/FUL	The Old Railway Station Sandon Bank Sandon Stafford Staffordshire St18 0Dj	0.0	81					0.0	81
22/36525/FUL	Common Road Industrial Estate, Pts Non Destructive Testing Verulam Road Stafford Staffordshire St16 3Ea	0.0	20					0.0	20
	Grand Total	**1.4**	**13,721**	**0.6**	**6,159**	**24.2**	**138,203**	**26.2**	**158,082**

Land within designated employment areas

7.10 Of the 160 ha allocated in the adopted Plan for Stafford Borough just 17 ha remains as detailed in the table below. Applying an average 40% plot ratio to these sites, 40% reflecting densities away from large sites for strategic warehousing, produces a potential floorspace of almost 70,000 sq m.

Table 7.2: Stafford Borough – land and schemes in the employment designations

Allocations	Ha	Sq m
Beacon Business Park	9.1	36,400
Ladfordfields Rural Employment Area	5.8	23,200
Western SDL - Employment Allocation	2.2	8,800
Grand Total	**17.1**	**68,400**

Source: SBC Plan monitoring data, and Rapleys' analysis

Land promoted for employment use

7.11 The choice of sites is mainly drawn from the SHELAA (Dec 2025) with no consideration of possible Stoke-on-Trent area supply but, in line with the Strategic Sites work, land in Stoke could contribute to this need (and vice versa).

7.12 In terms of scale, the quantum of site promotion in the area is a 'market signal' in its own right, with developers making informed decisions regarding the scale and location of future development. Around 200 ha[30] has been promoted which suggests the level of industrial need is broadly correct.

7.13 The table overleaf identifies sites considered suitable and attractive for employment use that in the main have been promoted through Call for Sites. A small number of sites were promoted through the Call, but not specifically for employment uses, and one site, Land South of Creswell Grove Adjoining M6, was not promoted through the latest Call, but has a lapsed planning permission for uses that included an element of employment.

7.14 The table indicates that there is a possible portfolio of circa 85 ha of 'strategic' land North of Stafford (west of the M6), the potential for 15 ha in East Stafford, 20 ha mixed strategic land south of Stone, plus local quality sites at Hixon, Ladfordfields and elsewhere. Of the rural areas Hixon has most potential and hence two sites totalling circa 10 ha are identified, with land at Ladfordfields, Brocton and Rayleigh Hall also contributing.

7.15 In strategic sites' terms the land North of Stafford is of a scale to provide more than one new 50 ha strategic logistics site, or a strategic site plus a new mixed use site exceeding 25 ha. The balance, away from the strategic sites would come forward elsewhere in the Borough as extensions to existing local sites, continuing to meet rural need.

[30] Note – for Land North of Stone the hectarage has been adjusted to reflect the known site constraints and proposed floorspace.

Table 7.3: Stafford Borough – land promoted for employment use

Areas / sites	Ha	Sq m	Comments
STAFFORD (NORTH)	**84.8**	**301,700**	
North Staffs	75.0	262,500	CRE02. 75 ha represents the whole land area (net of the Pets at Home site), the maximum 'up to' area. It is entirely possible that based on a 35% plot ratio that the floorspace could be achieved by the landscape buffering following the route of the high pressure gas main's inner cordon.
Land South of Creswell Grove Adjoining M6	*7.2*	*28,800*	Not promoted in the latest Call. Site immediately east of CRE02, and together would deliver c10 ha with access onto the SRN junction without passing though the village.
Land at Creswell Grove, Creswell	*2.6*	*10,400*	CRE06 Access would be needed onto A5013 (Cresswell Grove) which means traffic would potentially need to pass through the village to access th SRN. Site immediately to the east could provideaccess onto the SRN junction without passing though the village.
Land north of Creswell Grove	0.0	0	CRE08 Site immediately west of M6 and opposite Mustang Drive/Redhill Business Pak, North Stafford . Access would be needed onto A5013 (Cresswell Grove) which means traffic would potentially need to pass through the village to access th SRN.
STAFFORD (EAST)	**15.0**	**60,000**	
Beacon Hill	*15.0*	*60,000*	HOP12 A 130 ha site promoted for mixed use, but without employment. This site and the parcel of land to the south east (HOP09 - Land to the west of A518 south of Brick House, Weston Road, Stafford (5.6 ha), promoted for housing are capable of delivering employment uses. This eastern side of Stafford has a history of delivering land for employment uses, and a collective minimum of c15 ha should be achievable for local rather than strategic employment.
STONE	**21.7**	**76,000**	
South of Stone BP (northern parcel)	21.7	76,000	SRUR21 Northern parcel 38 ha site, but large proportion required for habitat and landscape buffering. Given strategic provision at Stafford, Junction 14 thislocation would be suited to the provision of more local industrial activity, with a greater balance between manufacturing and warehousing activity.
South of Stone BP (southern parcel)	*0.0*	*0*	Site probably needed for mitigation purposes.
HIXON	**10.7**	**42,800**	
Land adjacent to Hixon Airfield Industrial Estate	6.7	26,800	HIX17 Promoted for employment uses, and would make a logical extension to the Airfield Industrial Estate.
former airfield (abutting railway), Hixon	4.0	16,000	HIX08 Promoted for employment uses.
Rushy Pitts Farm, Church Lane, Hixon	*0.0*	*0*	HIX11 Previously allocated, but not taken up. Remote from Airfield IE and small site.
Land west of Church Lane, Hixon	*0.0*	*0*	HIX02 Already two Airfield sites close to the Industrial Area with potential to deliver c10 ha, plus two sites currently with planning permission. Thus, no need to allocate
RURAL EAST	**0.0**	**0**	
Land Southeast of Sandon Sawmill	*0.0*	*0*	SAL05 Rural location, small site 100 m wide at maximum. Possible highway constraints accessing A51.
Grindley Business Village	*0.0*	*0*	STOW02 Rural location, small village small labour pool.
RURAL SOUTH	**2.6**	**10,400**	
Land to the rear of Brocton Business Park, Brocton	2.6	10,400	BRO03 Land to the rear of existing light industrial area with good access to Cannock Rd A34. Half a mile from Stafford and Brockton is a larger village. Probable countryside/landscape issues.
LADFORDFIELDS	**5.6**	**22,320**	
Land immediately east of Ladfordfields	5.6	22,320	SEI01 rectangular plot that would 'round off' the existing IE.
Land to the east of Ladfordfields	*0.0*	*0*	SEI20 one third of the site is within FZ2/3, excluding this means 8 ha developable. Possible, but parcel (SEI01) likely to provide for local market over plan period.
Land to the south of Ladfordfields	*0.0*	*0*	SEI02A strip of land south of the existing estate. Likely to be too narrow to make development viable (access)
RURAL WEST	**2.5**	**9,840**	
Raleigh Hall Industrial Estate, Eccleshall	2.5	9,840	ECC21 Potential extension to existing Raleigh Hall IE.
Grand Total	**142.9**	**523,060**	

7.16 The table below summarises the supply and sets out the overall demand supply balance.

Table 7.4 Stafford Borough – demand supply balance

		Ha	Sq m
a	**NEED - 2025-45**	**178.0**	**624,599**
	SUPPLY		
b	Planning permissions	26.2	158,082
c	Land within existing allocations	17.1	68,400
d	**Committed supply (b+c)**	**43.3**	**226,482**
e	**Unmet need (a-d)**	134.7	398,117
f	Proposed allocations	142.9	523,060
g	**BALANCE (f-e)**	**8.1**	**124,943**

Nb total supply does not add exactly to the sum of the elements due to rounding.

7.17 Thus, in land terms the balance indicates a small buffer for contingency of circa 10%.

Office land supply

7.18 Against the office need (range of 20,000 – 30,000 sq m) there is no promoted supply beyond large mixed-use sites that could accommodate a range of uses, including some small scale E class employment space.

7.19 While it remains unviable to deliver new office floorspace every effort should be made to protect existing stock; for as long as it remains viable to do so. Existing stock cannot be replaced with new build and, at the time of writing vacancy rates are not a concern. In the short term the Council will need to carefully consider how vacancy rates change when considering potential windfall losses.

7.20 There are concerns that legacy office sites, such as the Technology Park, may not be able to re-invest and regenerate at existing values, but it is not recommended to proactively release any sites at this time. This is because the pipeline supply of planning commitments is no substitute for build stock and especially while most of Stafford Borough's stock is occupied with reasonably low Borough-wide levels of vacancy.

7.21 Therefore, future proposed losses of office stock should be robustly tested with marketing of the floorspace, and land as a redevelopment opportunity. However, given the difficulty of finding deliverable and market attractive industrial sites that are free of constraints including nearby residential uses, where appropriate the Council may look more favourably at a switch from office to industrial uses.

7.22 Regarding new offices the recommendation is to boost Stafford town centre supply both as a sustainable, policy compliant sequential approach, but also because it matches wider aspirations. The three sites identified in the masterplan with the most potential are Station Gateway, Riverside south and Victoria.

7.23 In the short-term the Council should encourage the large housing sites in the emerging plan to provide flexible E class employment space as part of their mixed use offer. This is especially the case around Stafford Town where the market focus is on larger industrial and warehouse units on newly allocated sites. For example, if a large number of homes are released at Beacon Hill, subject to the Local Plan process, as noted when considering industrial supply, there is scope for a mixed employment offer that better addresses local needs than would be provided North of Stafford. E class should be explored as part of that and particularly if it could help strengthen the Technology Park by providing new space.

7.24 The flexibility of E class means it is not possible to be prescriptive regarding how much 'office' space could or should be included as part of any mixed offer, but it is expected that major developments would be accompanied by local employment evidence that would better refine their offer, in line with their delivery ability. For this report the expected employment land 'ask' has been attributed from these sites as 'industrial' given that is the major current driver of demand.

7.25 The above approaches do not rule out small-scale allocations in Stone, as the other main town centre, but these need to be market-led and respond to site promotion. Where land is released at Stone the Council should promote limited E class provision to help deliver a mix of new employment options in the town. As with Stafford Town, there is a risk that site promotion will only favour larger units – flexible E class should be considered and especially where site constraints may provide opportunities to work around larger units and make the most efficient use of land.

7.26 There is no pressing need for any new out of town office supply.

7.27 Over the plan period, and when the office market has resumed construction, there is scope to more proactively seek to upgrade Stafford Borough's offer and allow weaker sites to be lost. However, this is dependent on a new town centre supply emerging.

8 CONCLUSIONS AND RECOMMENDATIONS

8.1 The Stafford Borough Economic Development and Housing Needs Assessment study is reported in two parts, with Part 1 (this document) reporting on Stafford Borough's economy and the assessment of future need for economic development across the Borough.

8.2 The separate Part 2 document reports on the housing needs assessment. The overlap between the two 'sides' of the study is the labour supply implications resulting from the demographic changes from future planned growth in housing. That issue is discussed in both parts of the report, but otherwise the two reports of study address separate topics.

8.3 Stafford Borough is part of the strong West Midlands industrial and logistics markets, and the Borough's economy has grown strongly since Covid, with substantial growth in the employment floorspace stock notably through warehouse and manufacturing development on land on the northern side of Stafford town. The Borough's industrial and warehouse floorspace grew from 1.3 million sq m in 2018 to 1.55 million sq m as at 2025. This growth has coincided with a sharp increase in resident wages reflecting an employment base with a comparatively high proportion of professional and highly skilled roles, and a highly educated workforce, albeit the Borough is 'polar' in this respect by also having a higher proportion of more elementary occupations compared with comparators.

8.4 The office market is modest in scale at 135,000 sq m and has remained at this level for well over a decade. Specialist provision is provided at the out-of-centre Stafford Technology Park on the eastern side of Stafford town, and the largest provision in the town centre is public sector based, such as the modern Grade A space at Staffordshire Place.

8.5 The Borough's job density, at 0.93, is high reflecting a comparatively high number of jobs compared to the size of the labour force. Commuting out to job opportunities elsewhere (notably the North Staffordshire conurbation at the City of Stoke-on-Trent and Newcastle-under-Lyme) is relatively modest, and the most recent data (2021 Census) shows in and out commuting rates are balanced. However, the out commuting is for high quality high waged jobs because resident wages are higher than workplace wages.

8.6 The Borough has long been considered a self-contained economic market area, and analysis of the commuting data shows that this remains the case with Travel-to-Work Area analysis suggests that the Borough is predominantly a self-contained 'Stafford' TTWA in accordance with the ONS definition.

Employment land need

8.7 The need for strategic scale logistics and distribution warehousing was considered recently and regionally through the 2024 West Midlands Strategic Sites Study that identified a joint Stafford / Stoke-on-Trent strategic market area, and recommended a 20 year need to 2045 for two large 50 ha sites and up to one site of 25 ha scale, both scales to accommodate a 'blend' of strategic warehousing and B2 uses. This study has tested this regional view on the market and reviewing the past trends in delivery and found support for that scale of need albeit 2024 was at the end of a Covid logistics bubble and the market has cooled since its prior peaks.

8.8 This study has considered the need for industrial and office need to 2045. It uses the three main PPG-based approaches to assessing future employment need – past trends, labour demand and labour supply, the latter presented as a sensitivity rather than a scenario to test if there will be sufficient labour available to meet the various projections of economic growth.

8.9 For the calculation of industrial need there is close alignment between the past trends approaches, with past trends in floorspace delivery (most recent 11 year period) producing a need to 2045 of ~570,000 sq m or 162 ha (Table 6.2), and past trend in job delivery (past ten years) producing an industrial need to 2045 for ~625,000 sq m or 178 ha (Table 7.4). These levels of future need aligned with market perceptions although, as noted, there is some concern that logistics demand is slowing from a previous peak. This position needs keeping under review as more data emerges over time and the longer term implications of the switch from the high street emerges.

8.10 The labour supply sensitivity test found that the recommended quantum of industrial need would generate 7,700 industrial and warehousing jobs, which with the addition of jobs in office and non-employment classes related jobs, fell within the scale of total labour supply that would derive from full Standard Method delivery, thereby passing the sense test.

8.11 The labour demand scenario based on the economic forecast derived a need figure roughly half as much as the past trends scenarios, and was therefore set aside.

8.12 Regarding the future need for office floorspace the evidence indicates there is little short-term market appetite for developing new office space. Taking a mid-longer term view, as the Local Plan must, market signals indicate office development could turning viable in the plan period. Past trends in office floorspace delivery have been very low, but mildly positive over the past decade, and thus identify a very low level of need when 'rolled' into a projection. Past office job change at ~150 additional job per annum produces a much higher floorspace projection, but this is dismissed because it would generate a need for around a third more office floorspace in the Borough over the 20 years to 2045, which failed the market sense test. Economic forecasts take a longer term view, and the labour demand approach suggests office based job growth over the first ten years will average 112 jobs pa, before slowing to just 38 jobs pa in the second half to 2045, generating an office floorspace need of ~25,000 over the first 10 years of the Plan and a further- 5,000 sq m over the 10 20 ten years to 2045.

8.13 While the office market is struggling, including viability, without any office related development almost all new jobs will be services or logistics / industry related with consequences for skills, employment mix and opportunity. Planning needs to consider full economic cycles and provide for flexibility, remaining positive over the plan period and secure opportunities for when the market recovers.

8.14 As referred to above, planning for the ~1,500 additional office based jobs in the context of industrial / warehouse and non-B class jobs in total is within the expectations of the additional labour supply delivered through Standard Method housing delivery.

Accommodating the identified need

8.15 The study shows that the Borough has 43 ha of land already committed to meet future industrial need (178 ha) –through planning permissions (26 ha) and 17 ha of land within the currently allocated sites.

8.16 While it is important for this study to identify land for local needs, it is key to identify future supply to provide for large scale logistics demand (~50 ha site). From the known potential development sites this study finds that the only location capable of providing for strategic scale delivery is through further development in the areas immediately adjoining north of Stafford town.

8.17 The assessment shows that while there is a high pressure gas main crossing the site, there is potential to deliver 75 ha of industrial / warehousing development on the land that has been promoted through the call for sites – CRE02.

8.18 The need for a site of ~25 ha that would provide for a more mixed employment provision, at a scale that would still be attractive for logistics provision is promoted south of Stone (SRUR21). No other sites have so far come forward in Stone, and while the site has some development constraints that may hinder how efficiently the land could be used if only large warehouse units were to come forward, with some flexibility of unit sizes, the site should be capable of being efficiently used.

8.19 Land for more local employment provision in Stafford town is identified for two adjoining sites at Creswell on the north-west side of the town that collectively could deliver ~10 ha of employment land (CRE08 and CRE06).

8.20 Smaller, more local quality site release are recommended elsewhere in the more rural parts of the Borough - these are predominantly extensions to existing sites that have traditionally attracted more local scale demand including open storage. The main land releases recommended are modestly scaled extensions to established former airfield sites with a track record of demand. These being at Hixon (HIX 08 and HIX17), Ladfordfields (SEI01), at Brocton Business Park (BRO03) and Raleigh Hall (ECC21).

8.21 Thus, in conclusion for industrial and warehousing uses, the Borough has sufficient economic land being promoted on economically advantageous sites to meet its economic needs over the next plan cycle - this includes strategic and local sites.

8.22 While the study recommends large amounts of new land (143 ha in total), reflecting market signals in the Borough, this does not mean that older sites can be released. The existing stock is well occupied and let at rents that will not support new build, but should support ongoing maintenance. Secondary stock is not generally substitutable for new. The Council needs to ensure that, when sites are proposed for release, there is no realistic prospect of demand, and all marketing routes have been followed.

8.23 For **offices** the market presents an ongoing 'challenge' – the market has not recovered from Covid and there is weak short-term market signals most notably the lack of site promotion. In that regard the current NPPF only seeks 10 years of supply and, with ongoing town centre master-planning work there is scope to address this in the mid-to longer term, albeit this study recommends that plans for new office provision must be focused in only one area, with locational advantages for office, and not 'pepper-potted', as office promoters will require critical mass. Over a plan period, and across economic cycles, the town centre will remain the most preferable and sequentially acceptable location for any future office style growth. With so much uncertainty in the office market at the moment, not just in the Borough but nationally, it can only be fair to conclude that ongoing masterplan and capacity work may be better placed to confirm supply.

8.24 The Local Plan team will need to carefully balance short term market evidence with a plan period strategy when considering site promotion. Developers and their advisors generally respond strongest to short term signals, and especially financial ones. However once sustainable sites are lost, especially to housing, it will be almost impossible to replace with similar quality. There are ongoing masterplan exercises in and around the town centre / station that should look to secure office provision although it is noted that the Station Quarter E class offer does not appear, from an economic perspective, logical and may need to be revisited. The station location is a prime asset than cannot be replicated.

8.25 In respect of existing office provision, the study has identified a plan period concern with the Stafford Technology Park and its ability to renew and invest over time with fragmented landownership being a further complication for management and renewal. The Call for Sites has identified a large, mixed use potential land allocation just to the north of the Technology Park (HOP12) which could include new economic floorspace, plus the smaller HOP09 site immediately north-east of the existing Beacon Industrial Park. The Council should encourage the landowners and promoters of these sites to work on a joint economic strategy for this area of Stafford Town -maintaining and growing the employment stock of floorspace in this area, but potentially changing the nature of that floorspace to deliver for modern requirements.