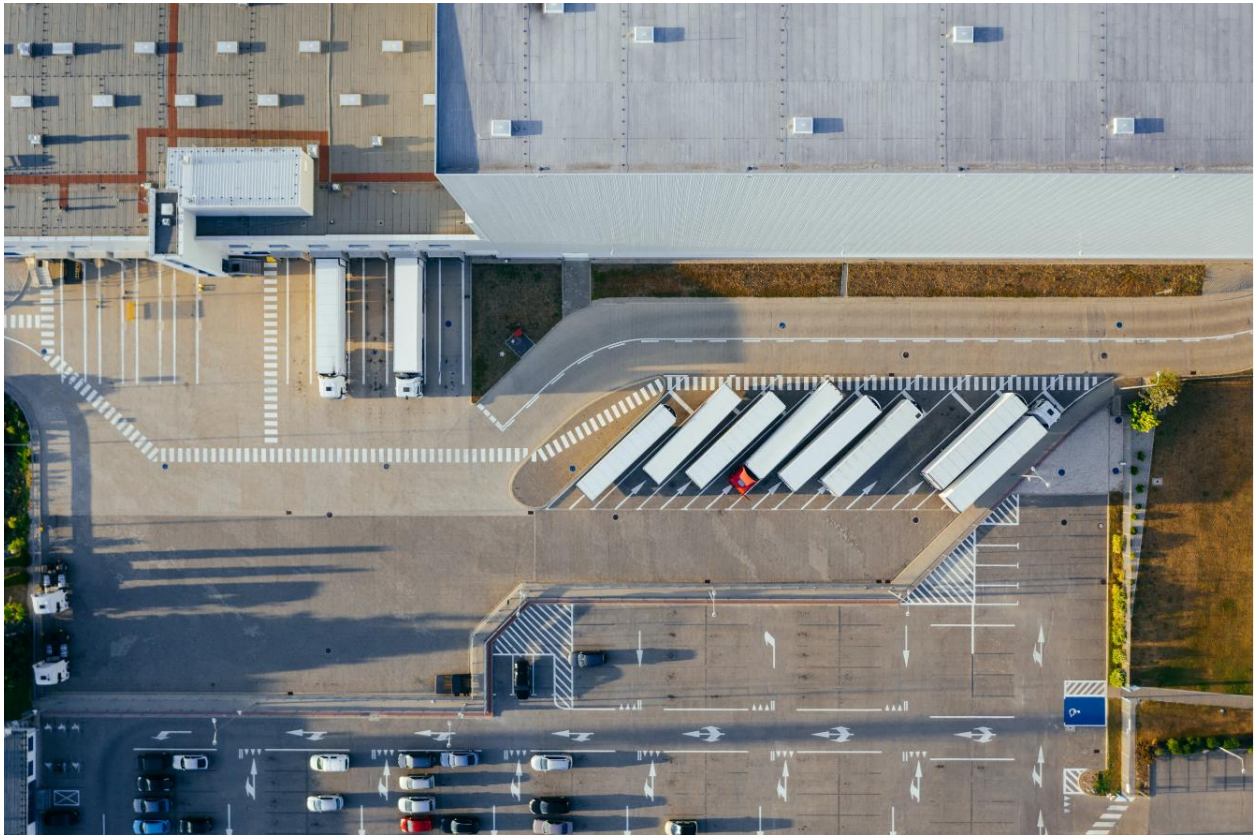


Greater Cambridge Partnership

# Understanding demand for B8 premises across Greater Cambridge

Industry Engagement



June 30<sup>th</sup> 2021

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# 1 Executive summary

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## 1.1 Overview

The Greater Cambridge Employment Land and Economic Development Evidence Study (GL Hearn with Iceni Projects Ltd, 2020) identified a shortfall of 263,404 square feet (24,471 square metres) of B8 (storage and distribution) space across the Greater Cambridge area between 2020 and 2041.

WSP have been commissioned by the Greater Cambridge Partnership and the Greater Cambridge Shared Planning Service to undertake industry engagement with logistics operators and providers in order to explore current availability and demand for B8 space in the Greater Cambridge area. The findings will feed into the Greater Cambridge Local Plan, which covers the City of Cambridge and South Cambridgeshire.

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## 1.2 Approach

A stakeholder database was compiled by WSP via existing connections at logistic companies as well as a thorough internet search in order to find contacts at local, regional, and international logistic companies. In total, 52 companies were contacted.

Initially, a covering email was sent out to contacts which included details of the study, and asked contacts to participate in a 30-minute discussion at their preferred time. Emails were sent out to the relevant contacts at periodic intervals to encourage participation in the study, as well as phone calls. A final email was sent to the companies yet to respond which included four key questions, focusing on the demand for B8 space in the Greater Cambridge area.

A discussion guide was created to form the basis of the 30-minute discussion. The discussion guide included four key questions about the availability and demand of B8 space in the Greater Cambridge area, with sub-questions for further detail.

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## 1.3 Findings

Of the 52 companies initially contacted, 19 replied (in various formats). Three companies indicated they had no time to talk, five companies indicated that they did not use B8 space, five companies indicated they had no demand for B8 space, and six companies indicated they had outstanding demand for B8 space.

Full discussion guides were carried out with the six companies that had immediate outstanding demand for B8 space in the Greater Cambridge area. Two of these companies were regional haulage operators, two were international logistic property specialists, and two were international parcel carriers. The companies' current use of B8

space, the key characteristics they look for in B8 space, demand for B8 space in Cambridge and the wider region, and key constraints in the supply of B8 space in Greater Cambridge were discussed.

There is high existing demand for B8 space in the Greater Cambridge area to service Cambridge and the surrounding area. This demand is not matched by supply, as all six companies looking for B8 space were struggling to find suitable sites. All of the companies indicated that B8 space was needed to meet the demand for delivery services within Cambridge itself. The regional companies would use B8 space to solely service Cambridge, but the four large-scale companies indicated they would ideally use the space to service the wider area in the east of England. The main constraints in finding suitable sites vary depending on the size of the company.

The regional operators' main constraint in the Greater Cambridge area was price as they sacrificed proximity to Cambridge for cheaper rent. This is in comparison to the international companies, who are finding it difficult to find a site of suitable size (most want something in the region of 100,000 square feet (9,290 square metres)). The location and price of the sites mattered less to the international companies.

Logistic companies feel as though there is not enough dedicated B8 space in the Greater Cambridge area, with manufacturing and science parks being prioritised over B8 space.

The regional operators prefer to service Cambridge from the north, using the A10 as the main arterial link into Cambridge. The national operators were looking for B8 space to the west/ north-west of Cambridge due to proximity to the Strategic Road Network (SRN) and the ability to service Cambridge via the A14 and A428. It was confirmed that Cambridge is a very good geographical location for the larger users of B8 space to serve the wider region/ surrounding counties. However, the lack of supply of B8 means that they must use B8 elsewhere, in less geographically optimal locations.

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## 1.4 Summary

The industry engagement undertaken for this report indicates there is a large amount of existing demand in the Greater Cambridge area for B8, especially for mid to large sized spaces (>25,000 square feet (>2322 square metres)). This is due to increasing demand for delivery services in urban areas.

Cambridge is deemed a geographically desirable location due to its proximity to the SRN. However, few of the logistic operators had existing B8 sites within Greater Cambridge (only Zedify and DHL) due to the lack of large B8 sites in the area and land cost being much higher than surrounding areas, resulting in a trade-off with higher stem mileage. Stem mileage is the distance travelled to/from a warehouse to/from a delivery zone. The delivery zone in this case is Cambridge.

Due to increasing demand for delivery services of all types, these companies believe that B8 space is crucial to meet the demands of Cambridge. However, all of the larger

companies indicated their preference to service the wider area/ surrounding counties from B8 space in the Greater Cambridge area due to its optimal geographical location.

The lack of supply of B8 space in the Greater Cambridge area causes constraints on logistic companies and operators in different ways. Regional operators (MLH, Robinsons Transport) are constrained more by the price close to Cambridge, whereas the national companies (DHL, Tritax, Prologis, DPD) are constrained by the lack of suitable land.

The companies engaged with that are actively looking for B8 space indicated that there is a distinct lack of B8 space available in the Greater Cambridge area (especially larger sites) citing the lack of priority given to B8 as a type of land use.

## 2 Introduction

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### 2.1 Project background

The Greater Cambridge Employment Land and Economic Development Evidence Study (GL Hearn with Icen Projects Ltd, 2020) identified a shortfall of 263,404 square feet (24,471 square metres) of B8 (storage and distribution) space, based upon recent completion trends, across the Greater Cambridge area between 2020 and 2041, as shown in **Table 1**.

**Table 1: B8 Demand Supply, Greater Cambridge (square metres), 2020-2041**

Use Class	Need	Supply	Balance	Comments
B8	43,659	22,462	-24,471	Shortfall identified

Source: Demand Supply by Use Class, Greater Cambridge (sqm) 2020-2041, GL Hearn

The study notes that the logistics sector is experiencing a high-level of change, due to increases in e-commerce and greater levels of automation, with attitudes also changing in response to the Covid-19 pandemic. The reported undersupply of B8 premises has subsequently led to the recommendation that:

“suitable locations should be identified for these premises, notable small and mid-sized light industrial, general industrial and distribution units. Light industrial premises are required with anticipated losses in the city requiring reprovision in South Cambridgeshire. Some provision should be made for allocations that support general industrial floorspace in order to facilitate traditional industries as well as supporting advanced industries that require operational activities not suited to residential areas.” [paragraph 1.32]

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### 2.2 Report purpose & structure

WSP have been commissioned by the Greater Cambridge Partnership (GCP) and the Greater Cambridge Shared Planning Service (GCSP) to undertake a programme of high-level engagement in order to better understand the nature of demand for B8 premises across the Greater Cambridge area. WSP therefore engaged with various (local, regional and international) parcel carriers, 3<sup>rd</sup> party logistics companies, logistic property companies, online retailers, haulage operators and trade counters in order to explore the current availability and demand for B8 space across the Greater Cambridge area.

The findings and conclusions drawn from this high-level industry engagement will feed into the forthcoming Greater Cambridge Local Plan (covering South Cambridgeshire and Cambridge city).

The remainder of this report is structured as follows:

- **Chapter 3: Methodology**  
describes the study area and the industry engagement process
- **Chapter 4: Findings**  
outlines the number and type of responses, analyses the recurring themes / constraints in locating B8 premises, and summarises the overall demand
- **Chapter 5: Summary & Conclusion**  
summarises the engagement undertaken and the findings from this engagement

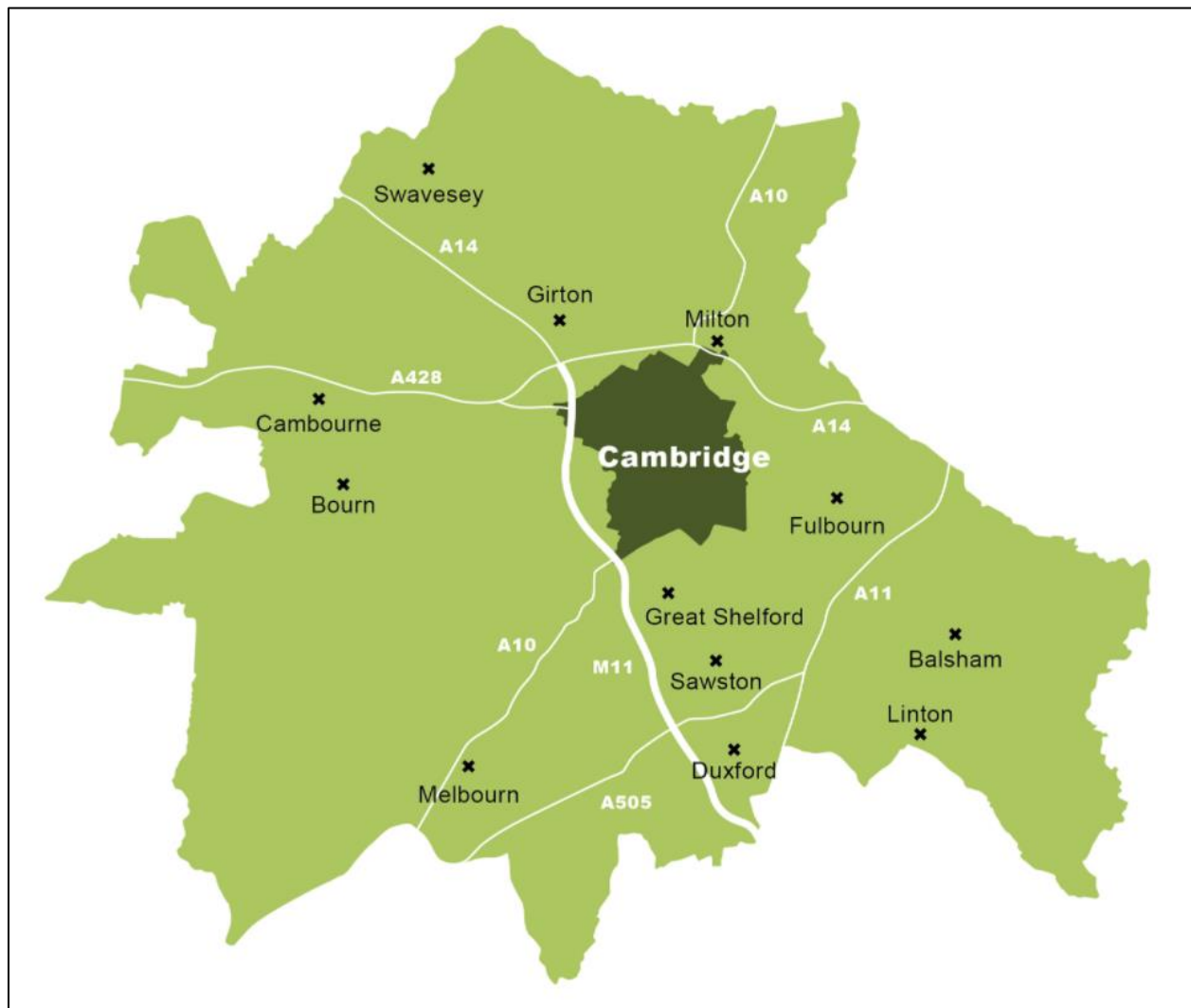
# 3 Methodology

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## 3.1 Study area

GCP and GCSP are seeking to uncover the scale and nature of demand for B8 premises across the Greater Cambridge area, which is strategically located to support storage and distribution operations. As shown in **Figure 1**, Greater Cambridge is bisected by a series of key routes which provide connectivity to the north (A14 / A10), east (A14), south (M11) and west (A428 / A14), as well as accessibility to a number of established and growing settlements within the area.

**Figure 1: Greater Cambridge**



Source: Greater Cambridge Shared Planning

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## 3.2 Industry engagement

A stakeholder database was compiled by WSP utilising existing connections and contacts as well as via a thorough internet search covering local, regional and international logistics companies / operators.

Initially, operators were emailed, providing a summary of the study and inviting contacts to provide their availability to take part in a 30-minute discussion with the project team. A discussion guide was created with four main questions with the purpose to steer these 30-minute discussions. Each of the four questions was structured with sub-topics and sub-questions in order to extract further detail from the discussions. The four discussion guide questions were:

- 1) What do your company's operations look like in the Greater Cambridge area?
- 2) What is your view on the availability of B8 premises in the Greater Cambridge area?
- 3) What are your key site requirements/ how do you decide on location?
- 4) What is the future of B8 space in Cambridge?

The full template of the discussion guide is attached in **Appendix A**.

**Table 2** indicates the quantity of operators where engagement was attempted, whilst a full list of those contacted can be seen in **Appendix B**.

**Table 2: Level of Engagement by Group**

Type of Logistics company	Number contacted
3 <sup>rd</sup> Party Logistics	11
Parcel Carriers	8
Zero emission delivery specialist	1
Logistics property	2
Online retail/ fulfillment	3
Haulage Operator	18
Self Storage	7
Waste Management	1
Manufacturer	1
<b>Total</b>	<b>52</b>

Initially, the response rate was low, so follow up emails were sent periodically in order to try and secure a discussion with the contact. In addition, direct phone calls were made to seek engagement. In order to maximise the level of feedback within the project timescales, a final email was sent to operators that were yet to respond, asking four key questions:

- 1) Will you be looking for additional B8 space in the Greater Cambridge area?
- 2) If yes, how much B8 space would you be looking for?
- 3) Within what time period would you want it by?
- 4) Is there a specific area that you would want it to be located in? If so, where?

Out of the 52 companies contacted, a total of 19 responses were provided (in various formats). The responses received and the key findings from the industry engagement exercise are covered in **Chapter 4**.

# 4 Findings

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## 4.1 Overview

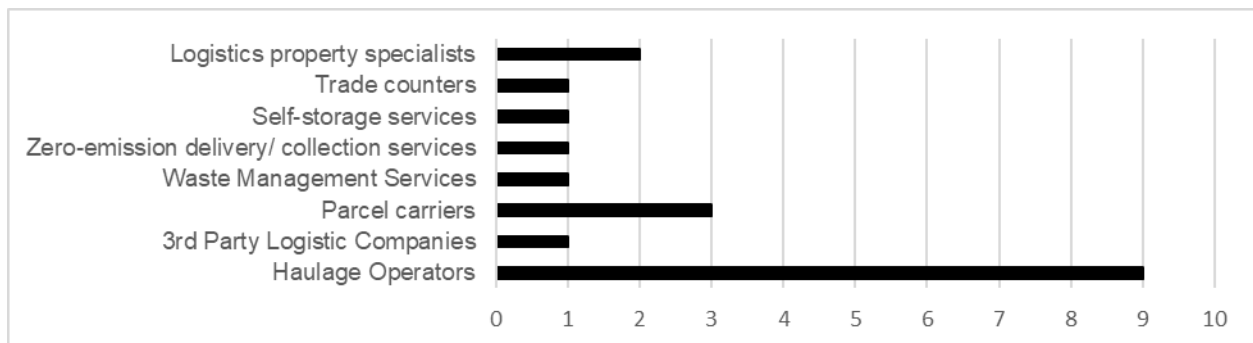
This chapter sets out the findings from the industry engagement exercise. It provides an overview of the types of responses received before covering the current operations and use of B8 premises across the Greater Cambridge area. Analysis is then provided on the scale and nature of demand for B8 premises.

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## 4.2 Responses

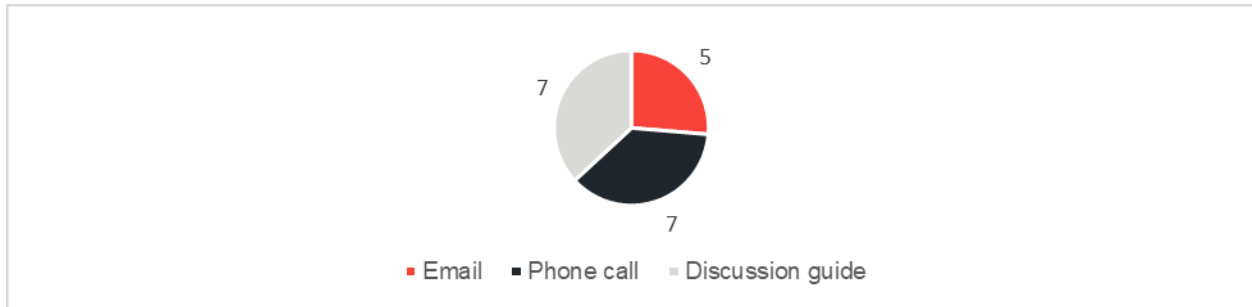
Out of the 52 companies contacted, a total of 19 responses were provided (in some form). As shown in **Figure 2**, nine haulage operators and three parcel carriers responded (see **Appendix B**). There were two responses from logistic property specialists. There was one response each from waste management services, zero-emission delivery / collection services, self-storage services, trade counters, and 3<sup>rd</sup> party logistic companies.

**Figure 2: Response by Group**



**Figure 3** indicates the different forms in which the responses were received. Five replied via email, whilst seven responded to direct phone calls. A total of seven companies / operators accepted the initial invitation to take part in the 30-minute virtual conference call with the project team.

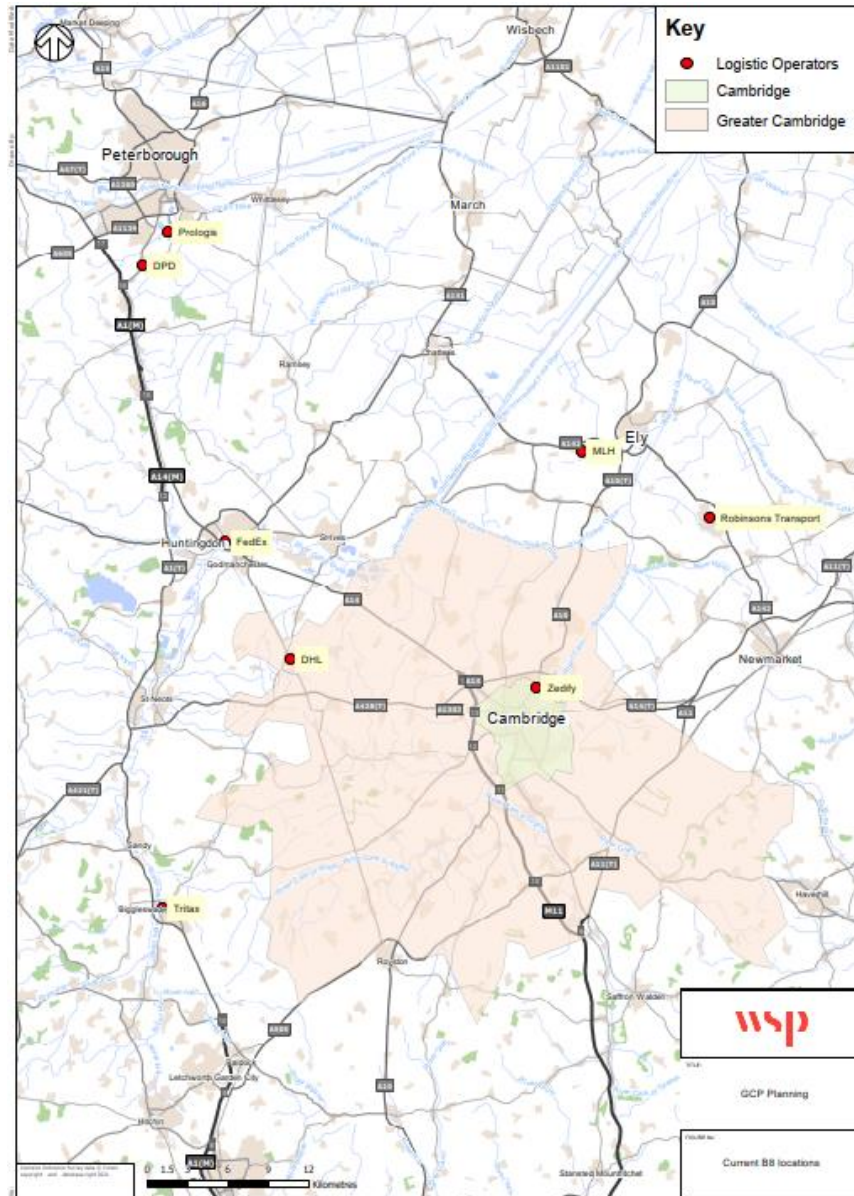
**Figure 3: Response Type**



### 4.3 Current operations of respondents

The current operations and use of B8 space in the Greater Cambridge area varied, largely depending on the size and type of logistic operations. **Figure 4** shows the locations of the current B8 space being used to service the Greater Cambridge area by each company that disclosed this information.

**Figure 4: Existing Locations of Operators (Limited to Those That Responded)**



Zedify were the only operator located within Cambridge as it is a first / last mile delivery zero-emission service. DHL operate from a warehouse in Papworth Everard, which is located in the Greater Cambridge area.

The other companies all service Cambridge from outside the Greater Cambridge area. MLH and Robinsons Transport currently service the Greater Cambridge area from the north, near Ely. Tritax and FedEx both have B8 premises located along the A1 corridor to the west / north-west of Cambridge. DPD and Prologis have B8 premises in Peterborough to the north-west of Cambridge. All operators have good accessibility to the surrounding highway network and key arterial routes across the area.

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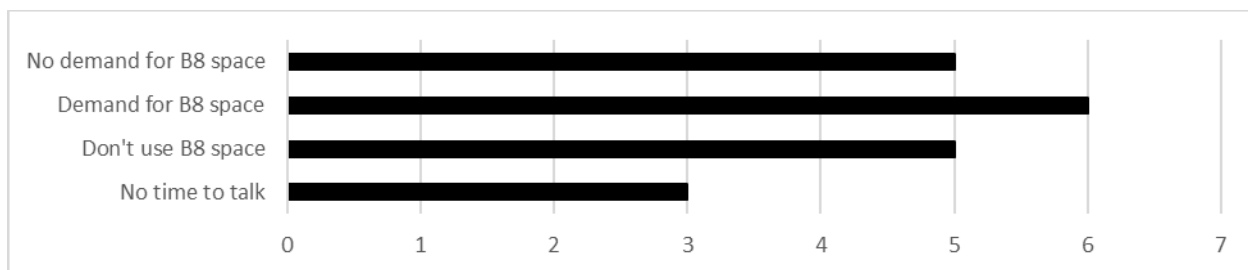
## 4.4 Demand for B8 premises

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### 4.4.1 Companies with no demand

Of the 19 respondents, three indicated that they did not have the time to talk; therefore, they disclosed limited details regarding demand for B8 premises. **Figure 5** also demonstrates that a further five operators did not occupy B8 premises (Rowell's Transport, G. Webb Haulage, Williams Transport, C.J Overy, and Big Yellow).

**Figure 5: Demand for B8 Premises**



Of the remaining responses, five indicated that they had no current demand for additional B8 space within Greater Cambridge within the next five years. However, some companies (for example, Zedify) indicated that their demand for B8 space could increase beyond this time period. A summary of those that have no additional demand and their supporting reasoning is provided in **Table 3**.

**Table 3: Operators with No Additional B8 Demand**

Company	Size	Reasoning
Veolia	International	Not interested in the area
XPO	International	Not interested in the area
FedEx	International	Just acquired 130,000 square feet (12,077 square metres) site in Huntingdon
Zedify	Regional	Current site is ideal. Has the ability to expand to meet increasing usage
Knowles Transport	Regional	Constructing 30,000 square feet (2,787 square metres) warehouse in addition to their current warehouses

### 4.4.2 Companies with outstanding demand

In total, six operators disclosed that they had immediate demand for additional B8 premises across the Greater Cambridge area (all of which undertook in-depth discussions with the project team). This demand stems from an ever-increasing demand

for delivery and freight services in urban areas (Cambridge), and the lack of current prioritisation of B8 space in the Greater Cambridge area. The operators contacted with outstanding demand were:

- MLH (Haulage Operator)
- Robinsons Transport (Haulage Operator)
- Tritax (Logistics Property)
- Prologis (Logistics Property)
- DPD (Parcel Carriers)
- DHL (Parcel Carriers)

DHL have two separate parts of their business: DHL supply chain (third party logistics), and DHL Express (parcel carriers). The dominant DHL operations taking place in the Greater Cambridge area are parcel logistics, hence the classification.

The following sections provide a summary of the discussions held with each of these operators. The completed discussion guides and notes made from the conference calls are provided in **Appendix C**.

#### **DHL**

- DHL currently serve Cambridge from a 20,000 square foot (1,858 square metre) warehouse in Papworth Everard to the west of Cambridge. This warehouse also currently serves Norfolk.
- The west of Cambridge (current location) is an optimal location due to ease of access to the major road networks (A428, A14, M11).
- DHL are looking for a new warehouse that is at least 100,000 square feet (9,290 square metres) in size to accommodate the increasing demand for delivery services and providing potential to service the wider area. The warehouse would need to be close to large conurbations and airports, as it is an international network.
- DHL would not consider other geographical regions of Cambridge to be better suited to their needs.
- It was noted that the maximum distance is 8-9 miles out, if they were located to the north, they would have to be less than that.

#### **DPD**

- DPD currently service Cambridge from Peterborough but are actively looking for a plot of land (approximately 100,000 square feet (9,290 square metres)) in the CB postcode. The location is not too important.
- Cambridge is the optimal location to service the east of England. One big location in Cambridge would be ideal, and they would ideally service as far as Great Yarmouth from it.
- Feels as though B8 space is neglected and the land surrounding Cambridge is too protected. Huge issues of supply for large warehouses.

## **TRITAX**

- Tritax operate a 4,000-acre portfolio of B8 space in the UK, but none within Cambridge. The closest site is at Biggleswade.
- Tritax believe there is not enough designated space for B8 industry, and especially not any large B8 spaces. This is partly because B8 space is outcompeted by manufacturing space.
- For big operators, price is less of an issue, it is more the availability of suitable plots of land.

## **MLH**

- MLH are a regional delivery operator with two warehouses in Haddenham (6,000 square feet (557 square metres) and 2,000 square feet (185 square metres) warehouses).
- MLH's preference is to be closer to Cambridge, around the Swavesey area, but the rent is double what they pay at Haddenham and therefore unaffordable.
- The north of Cambridge is their ideal location, but Chatteris or Wisbech is too large a stem mileage.
- MLH do not find it difficult to find warehouse workers but do struggle to find drivers.
- Many of the warehouses being built do not have storage space for vehicles.

## **ROBINSON'S TRANSPORT**

- Robinson's are a regional delivery operator, with two rented warehouses in Soham and Upwell.
- Price is the dominant factor that influences the location of warehouses for Robinson's, but location remains important. They feel there is a huge shortage of B8 space within Cambridge itself.
- There are available units in Waterbeach to the north of Cambridge, but they are too expensive compared to what they are paying at Soham / Upwell.

## **PROLOGIS**

- Prologis' closest current warehouses to Cambridge are in Peterborough and Huntingdon. There is demand for B8 space wherever there are urban conurbations, so there is demand in the Cambridge region.
- In terms of location, when looking for B8 space, Prologis first consider the proximity to labour, then proximity to arterial roads, then distance from residential areas, then proximity to a power source.
- Slight worry about Cambridge is lack of labour for larger warehouses. Optimal location would be on the A14 to link to the A1 corridor.
- Huge opportunity for last mile logistics facilities in Cambridge.

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## 4.5 Key factors affecting demand

As outlined in **Section 4.4**, there is a variety of demand for B8 space across the Greater Cambridge area. Some companies already have warehouses in place to meet their operational needs. However, there is not enough supply of B8 industrial sites or spaces, as several companies are currently seeking B8 space (varying in size) and struggling to find suitable sites. The main factors that impact the ability to find suitable B8 space were explored, with three recurring key requirements: size of the space, a suitable location, and price of the space.

These main constraints are categorised for each of the companies with additional demand, with the analysis provided in **Table 4**. High indicates that the constraint is the main obstacle in finding suitable B8 space, medium indicates some problem, and low indicates much less of a problem.

**Table 4: Factors Impacting Upon Demand**

Company	Size	Plot Size	Location	Price
DHL	International	High	Medium	Medium
DPD	International	High	Medium	Low
MLH	Regional	Medium	Low	High
Robinsons Transport	Regional	Low	Low	High
Tritax	International	High	Medium	Low
Prologis	International	High	Medium	Low

The largest constraints in the Greater Cambridge area depend on the company looking for the B8 space. Location and price play much less of a role for large-scale operations, as long as they are located in the CB postcode. However, the smaller, more regional operators indicated that the supply for smaller B8 spaces closer to Cambridge was there (near Waterbeach, for example), but the cost of land was far too high. Further analysis of each constraint is summarised in the following sections.

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### 4.5.1 Size

- All of the largest logistics companies indicated that the main struggle was to find a site that was big enough.
- Most of these logistics operators wanted a site in the region of 100,000 square feet (9,290 square metres).
- The size of these sites stems from primarily needing to meet the demand for delivery services within Cambridge itself, but would also provide options to service the surrounding areas / counties.

- The difficulty in finding large sites was due to potential sites being used for other purposes (such as manufacturing), and there is not enough designated space for B8 industry.
  - MLH currently operate from three different warehouses but would ideally operate from just one. The lack of availability of B8 space affects the mid-sized storage spaces, as well as the operators looking for the larger B8 spaces.
- 

#### 4.5.2 Location

- DHL stated that the optimal location was to the west of Cambridge, in close proximity to the A14, M11, and A428. The maximum distance they would want to serve Cambridge from is 8-9 miles.
  - DPD indicated that Cambridgeshire is the optimal location to service the East of England but had little preference in terms of location within Cambridgeshire.
  - Due to the proximity to the A14, M11, and A10, the west of Cambridge is the optimal location to serve both Cambridge and the surrounding counties.
  - Prologis mentioned that one potential problem with the Cambridge area is the lack of available workforce due to low unemployment rates.
- 

#### 4.5.3 Price

- All of the companies interviewed commented that the price of B8 space within Cambridge was unaffordable.
  - MLH and Robinsons (regional operators) indicated that they would operate from B8 spaces closer to Cambridge (e.g. Swavesey), but it is too expensive. Hence, they sacrifice a larger stem mileage for cheaper B8 space.
  - The national / international operators were less driven by the price, although indicated that the lack of availability drives up the price.
- 

#### 4.5.4 Other

- Prologis indicated the need to be in close proximity to a power source, due to the high electricity usage.
  - Prologis also mentioned the importance of smaller micro-consolidation hubs within Cambridge, to support first-mile / last-mile journeys.
  - The need for good Wi-Fi was mentioned by Robinsons Transport.
- 

### 4.6 Impact of covid-19

Another recurring theme drawn out from the discussions with industry operators was the increasing need for B8 space near to urban conurbations in general, not just

Cambridge. The six companies with outstanding demand are all actively looking for B8 space in and around Cambridge, but the demand for B8 space has increased throughout the UK due to the huge increase in home delivery services, in part caused by the Covid-19 pandemic. In the long-term, the demand for delivery services is likely to continue to increase, and with it the demand for B8 space.

Both FedEx and Zedify indicated that they had no demand for B8 space within the next 5-years, but the demand could exist in the long term.

# 5 Summary & Conclusion

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## 5.1 Summary

The Greater Cambridge Employment Land and Economic Development Evidence Study (GL Hearn with Icen Projects Ltd, 2020) identified a shortfall of 263,404 square feet (24,471 square metres) of B8 (storage and distribution) space across the Greater Cambridge area by 2041.

WSP have therefore engaged with various (local, regional and international) parcel carriers, logistics property companies, online retailers, haulage operators and trade counters in order to explore the current availability and demand for B8 space across the Greater Cambridge area. Out of the 52 companies contacted, a total of 19 responses were provided (in various formats).

In summary, the industry engagement has concluded that B8 space is required to meet the demand of Greater Cambridge and the surrounding areas due to the increasing demand for delivery services in all urban areas (mentioned by Prologis and Tritax representatives). This increasing demand has been triggered by a plethora of factors, including online consumerism, and the Covid-19 pandemic has exacerbated this trend.

Geographically, Greater Cambridge is considered desirable due to its location in terms of the wider SRN, particularly locations on the A14 and A428 providing access to the A1. However, few of the logistic operators had existing B8 sites within Greater Cambridge (only Zedify and DHL) due to the lack of large B8 sites in the area and land cost being much higher than surrounding areas (resulting in a trade-off with higher stem mileage).

Regional operators (MLH, Robinsons Transport) are constrained more by the price close to Cambridge, whereas the national companies (DHL, Tritax, Prologis, DPD) are constrained by the lack of suitable land. Both of these constraints stem from the lack of supply of B8 space in the Cambridge area. There is a lack of supply of mid to large sized B8 space (>25,000 square feet (2,322 square metres)), but where there are small-sized units available (Waterbeach), these are too expensive.

The larger operators see the west / north-west of Cambridge as optimal locations for B8 space due to the ease of access to the SRN. The two regional operators saw the north of Cambridge as an ideal location, due to only servicing Cambridge and not the wider region.

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## 5.2 Conclusion

The discussions with logistic operators have resulted in the conclusion that there is outstanding demand for B8 premises across the Greater Cambridge area, with a distinct

lack of medium to large sized sites available or cost driving decisions to locate elsewhere.

Whilst not all logistics operators that responded are looking for B8 space in the area, those that are find it extremely difficult to find suitable sites with B8 space not seen as being given enough priority in terms of land use in the Greater Cambridge area.

# **Appendix A:**

## **Discussion guide**

### **template**

## GCP planning – B8 engagement (discussion guide)

---

### Overview

The Greater Cambridge Employment Land and Economic Development Evidence Study (GL Hearn with Icen Projects Ltd, 2020) identified a need for additional small and mid-sized B8 (Storage and Distribution) floorspace across Greater Cambridge to 2041. Therefore, WSP, on behalf of Greater Cambridge planning colleagues, are seeking to undertake some high-level industry engagement to provide an understanding of the nature of demand for B8 commercial premises (across the area), to feed into the evidence base of the emerging Greater Cambridge Local Plan.

### Discussion Guide

The main discussion topics are in **bold**. The questions beneath the free-text sections are to be used as prompts to steer the discussions in order to extract the information required from the engagement sessions.

#### Company details:

Name: Insert

Type: Insert

#### **What do your company's current operations look like in the Greater Cambridge region?**

Existing site locations (within Greater Cambridge?) / current operations / types of goods / ownership of B8 space

Nearest site location.

Do you own the site? If not, who are the operators of the site?

Are there other logistic companies that use the site?

What operations / freight movements currently take place at the site?

Where do your workers generally live? Do you find it difficult to recruit staff?

What sector does your site serve (now and future aspirations)?

What market does your site serve (now and future aspirations)?

Is there enough capacity to meet demand at your site(s)?

Notes:

#### **What is your view on the availability of B8 premises in the Greater Cambridge region?**

Problems / lack of availability (geographically) / max distance from Cambridge / suitable for demand

Do you have a requirement for a site closer to Cambridge? Or a requirement for a site in Greater Cambridge in general?

How urgent is this outstanding demand for B8 space in Cambridge? Or Greater Cambridge?

What is the preferred and maximum distance from Cambridge you would operate?

Have you ever looked for a site in Cambridge and/or Greater Cambridge but there are none available? If so, what size of site?

Are there particular geographical regions of Greater Cambridge that lack availability? (North / East / South / West of Cambridge)

Notes:

### **What are your key site requirements / how do you decide on location?**

Price / size / location / nearby workforce

What are your key site requirements?

Do you see Greater Cambridge as a good strategic location, and if so, for what operations?

If you currently use a B8 space in Greater Cambridge, what are the benefits / disadvantages?

Do you see land price as a major obstacle for usage / demand of B8 space in Cambridge?

Notes:

### **What is the future of B8 space in Cambridge?**

Good strategic location / benefits / disadvantages / price of land / potential in wider region

How important is adapting to climate change to your business? How is it impacting on your choices?

Is your business type a significant user of electricity? Now and/ or in the future?

Do you have any other thoughts on the trends in warehousing and distribution uses in Greater Cambridge?

What role do you see the Cambridge area performing relative to the wider region e.g. Peterborough, Milton Keynes etc?

Notes:

# **Appendix B: List of operators contacted**

Company	Contacted by	Replied	Type
DHL	CD	Discussion guide	Parcel carrier
DPD	CD	Discussion guide set up	Parcel carrier
Zedify	GP	Discussion guide - no outstanding demand for B8 space at the moment.	Zero emission delivery/collection service
Wincanton	CD	Bounce back	3PL
Wincanton	GP	No reply	3PL
FedEx	CD	Not looking for more space - just got new site in	Parcel carrier
UPS	CD	No reply	Parcel carrier
Prologis	CD	Discussion guide set up	Logistics Property
Tritax	CD	Discussion guide	Logistics Property
Amazon	GP	Bounce back	Online retail/fulfilment
Amazon	GP	No reply	Online retail/fulfilment
Hermes	GP	No reply	Parcel carrier
Hermes	GP	No reply	Parcel carrier
Screwfix	GP	No reply	Trade counter
Screwfix	GP	No reply	Trade counter
Plumbing Trade Supplies	GP	No reply	Trade counter
King Storage	GP	No reply	Self storage
Big Yellow	GP	Don't use B8 space	Self storage
Kuehne-Nagel	GP	No reply	3PL
Clipper Logistics	GP	No reply	3PL
Lineage Logistics	GP	No reply	Haulage operator
Ceva Logistics	GP	No reply	3PL
Culina Logistics	GP	No reply	3PL
Anderson Transport	GP	No reply	Haulage operator
Malco Freight Ltd	GP	No reply	Haulage operator
T&R Logistics	GP	No reply	Haulage operator
Royal Mail	GP	Bounce back	Parcel carrier
XPO	GP	No interest in Cambridge area for logistics/ B8.	3PL
XPO	GP	No reply	3PL
Yodel	GP	No reply	Parcel carrier
Turners Soham	GP	Bounce back, but sent to new email. Bounce back again	Haulage operator
Yusen Logistics	GP	No reply	3PL
DSV	GP	No reply	3PL
Veolia	GP	No demand for B8 space in the area	Waste management
Travis Perkins	GP	Bounce back	Trade counter
Saint-gobain	GP	No reply	Manufacturer

<b>Company</b>	<b>Contacted by</b>	<b>Replied</b>	<b>Type</b>
James and James Fulfilment	GP	Bounce back	Online retail/fulfilment
C.J.Overy	GP	Run from home address - too small scale (Don't use B8)	Haulage operator
Robinsons Transport	GP	Discussion guide	Haulage operator
MLH Transport	GP	Discussion guide	Haulage operator
Fenland Haulage and Storage	GP	No reply	Haulage operator
Swannells Transport	GP	Third call - 'unable to answer the questions'	Haulage operator
Welch	GP	Third call - didn't have time to answer questions	Haulage operator
Rowells Transport	GP	Don't use B8 space	Haulage operator
Bretts	GP	No reply	Haulage operator
Gwebb	GP	Don't use B8 space despite being a haulier	Haulage operator
Knowles Transport	GP	Operate 2 million sqft and building another 30,000 sqft. March/ Wisbech area, not looking to expand further	Haulage operator
Williams Transport	GP	Purely transport - don't have any demand for B8 space as only the transportation between warehouses.	Haulage operator
S R Harrandine Haulage	GP	No reply	Haulage operator
Screwfix Cambridge	GP	No reply	Trade counter
Travis Perkins Cambridge	GP	Number was only for orders/ talking to staff about orders. Too small scale (Couldn't talk)	Trade counter
BSS Cambridge	GP	No reply	Trade counter

# **Appendix C:**

## **Completed**

### **discussion guides**

## GCP planning – B8 engagement (discussion guide)

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### Overview

The Greater Cambridge Employment Land and Economic Development Evidence Study (GL Hearn with Icen Projects Ltd, 2020) identified a need for additional small and mid-sized B8 (Storage and Distribution) floorspace across Greater Cambridge to 2041. Therefore, WSP, on behalf of Greater Cambridge planning colleagues, are seeking to undertake some high-level industry engagement to provide an understanding of the nature of demand for B8 commercial premises (across the area), to feed into the evidence base of the emerging Greater Cambridge Local Plan.

### Discussion Guide

The main discussion topics are in **bold**. The questions beneath the free-text sections are to be used as prompts to steer the discussions in order to extract the information required from the engagement sessions.

#### **Company details:**

Name: DPD

Type: Parcel carrier

#### **What do your company's current operations look like in the Greater Cambridge region?**

Existing site locations (within Greater Cambridge?) / current operations / types of goods / ownership of B8 space

Nearest site location.

Do you own the site? If not, who are the operators of the site?

Are there other logistic companies that use the site?

What operations / freight movements currently take place at the site?

Where do your workers generally live? Do you find it difficult to recruit staff?

What sector does your site serve (now and future aspirations)?

What market does your site serve (now and future aspirations)?

Is there enough capacity to meet demand at your site(s)?

#### Notes:

At the moment – serve from Peterborough, but ideally need a site in Cambridge.

Actively looking for an existing building or plot of land. 7 to 10 acres. Building max 100,000 square foot.

Currently have a full circulation, several access points, locked doors. Yard space for parking trailers.

Use a third party called SPH who do the land acquisitions. They're looking – meeting in 2 weeks time. They brought a plot of land in Norwich.

**What is your view on the availability of B8 premises in the Greater Cambridge region?**

Problems / lack of availability (geographically) / max distance from Cambridge / suitable for demand

Do you have a requirement for a site closer to Cambridge? Or a requirement for a site in Greater Cambridge in general?

How urgent is this outstanding demand for B8 space in Cambridge? Or Greater Cambridge?

What is the preferred and maximum distance from Cambridge you would operate?

Have you ever looked for a site in Cambridge and/or Greater Cambridge but there are none available? If so, what size of site?

Are there particular geographical regions of Greater Cambridge that lack availability? (North / East / South / West of Cambridge)

**Notes:**

Just within the postcode – location is not overly important. Electric fleets that would cover inner city requirements. Would service up to Great Yarmouth, Stapleton.

Location doesn't matter too much.

Look at lease option or developing yourself. Its very urgent, talking three years by the time a suitable land is found, after legals, development etc. Existing buildings a lot quicker, but much harder to find an existing building.

**What are your key site requirements / how do you decide on location?**

Price / size / location / nearby workforce

What are your key site requirements?

Do you see Greater Cambridge as a good strategic location, and if so, for what operations?

If you currently use a B8 space in Greater Cambridge, what are the benefits / disadvantages?

Do you see land price as a major obstacle for usage / demand of B8 space in Cambridge?

**Notes:**

**What is the future of B8 space in Cambridge?**

Good strategic location / benefits / disadvantages / price of land / potential in wider region

How important is adapting to climate change to your business? How is it impacting on your choices?

Is your business type a significant user of electricity? Now and/ or in the future?

Do you have any other thoughts on the trends in warehousing and distribution uses in Greater Cambridge?

What role do you see the Cambridge area performing relative to the wider region e.g. Peterborough, Milton Keynes etc?

Notes:

Cambridge is optimal. Cambridge is the perfect location to service the whole of the east of England. One big location in the Cambridge region would be ideal.

Need to push forward B8 space. Plenty of land, but too much green belt, and not enough land that is free for B8 development.

## GCP planning – B8 engagement (discussion guide)

---

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### Discussion Guide

The main discussion topics are in **bold**. The questions beneath the free-text sections are to be used as prompts to steer the discussions in order to extract the information required from the engagement sessions.

#### Company details:

Name: DHL

Type: Parcel Carrier/ 3<sup>rd</sup> Party Logistics

#### **What do your company's current operations look like in the Greater Cambridge region?**

Existing site locations (within Greater Cambridge?) / current operations / types of goods / ownership of B8 space

Nearest site location.

Do you own the site? If not, who are the operators of the site?

Are there other logistic companies that use the site?

What operations / freight movements currently take place at the site?

Where do your workers generally live? Do you find it difficult to recruit staff?

What sector does your site serve (now and future aspirations)?

What market does your site serve (now and future aspirations)?

Is there enough capacity to meet demand at your site(s)?

#### Notes:

DHL set up as a whole – various business units in UK, supply chain (3<sup>rd</sup> part), DHL express (parcel operators). DHL express are international. DHL are business parcels etc.

In Cambridge – DHL Express (network business), close to large conurbations.

Parcels from all over the world – from Heathrow/ Stansted.

Papworth Everard – 20,000 square feet in total. Been there since 2002. 20-year lease which expires next year. Looking for new space for the last 5 years. Want a

larger building. Because of Camb traffic restraints – A14 (busy), better to be on the west side. Also service Norfolk.

Couldn't find anything large enough. 100,000 square feet needed due to huge increase in demand of parcel deliveries.

There is not a lot out there – compared to other cities. About 4 different themes being discussed. Planning permission might not be given.

The council seem more keen for new science parks etc.

Think they've found a site from 2023 to occupy. Developers think demand will be in the mid-box range. More keen to develop low density buildings. It's been very difficult to find.

### **What is your view on the availability of B8 premises in the Greater Cambridge region?**

Problems / lack of availability (geographically) / max distance from Cambridge / suitable for demand

Do you have a requirement for a site closer to Cambridge? Or a requirement for a site in Greater Cambridge in general?

How urgent is this outstanding demand for B8 space in Cambridge? Or Greater Cambridge?

What is the preferred and maximum distance from Cambridge you would operate?

Have you ever looked for a site in Cambridge and/or Greater Cambridge but there are none available? If so, what size of site?

Are there particular geographical regions of Greater Cambridge that lack availability? (North / East / South / West of Cambridge)

#### **Notes:**

Size is biggest issue.

Hermes, Amazon, DPD.

General feeling is that the biggest lack of stock for the industry is 25-60,000. Biggest hole in the market. A lot of interest in the mid-sized bracket.

Price: Enfield – always things being built, know the price/ what you're expecting to pay for the rent. In Camb not the same comparison, rents for industrial property have gone through the roof recently.

There's a shortage, should be consideration, massive demand and lack of supply.

### **What are your key site requirements / how do you decide on location?**

Price / size / location / nearby workforce

What are your key site requirements?

Do you see Greater Cambridge as a good strategic location, and if so, for what operations?

If you currently use a B8 space in Greater Cambridge, what are the benefits / disadvantages?

Do you see land price as a major obstacle for usage / demand of B8 space in Cambridge?

Notes:

Location: West – Papworth Everard – A428, A14. All the areas on the west side.

Access point of view.

Maximum distance from Camb: 8-9 miles from the city centre, again depends on which side out – north wouldn't want to be that far out.

### **What is the future of B8 space in Cambridge?**

Good strategic location / benefits / disadvantages / price of land / potential in wider region

How important is adapting to climate change to your business? How is it impacting on your choices?

Is your business type a significant user of electricity? Now and/ or in the future?

Do you have any other thoughts on the trends in warehousing and distribution uses in Greater Cambridge?

What role do you see the Cambridge area performing relative to the wider region e.g. Peterborough, Milton Keynes etc?

Notes:

Developers have confidence that there will be a shift – last one was Swavesey. There will be small scale development going on. Already an employer in Camb, will get a through developments through. The buildings will be so in demand, will need to build more. Still problems on demand.

Too difficult to find what is needed. It is v difficult to fulfil the needs of Camb. Overly full, causes traffic problems etc. Leave the site.

The demand of what people want in the area is not being fulfilled.

# GCP planning – B8 engagement (discussion guide)

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## Overview

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## Discussion Guide

The main discussion topics are in **bold**. The questions beneath the free-text sections are to be used as prompts to steer the discussions in order to extract the information required from the engagement sessions.

### Company details:

Name: Robinsons Transport

Type: General Haulier

### **What do your company's current operations look like in the Greater Cambridge region?**

Existing site locations (within Greater Cambridge?) / current operations / types of goods / ownership of B8 space

Nearest site location.

Do you own the site? If not, who are the operators of the site?

Are there other logistic companies that use the site?

What operations / freight movements currently take place at the site?

Where do your workers generally live? Do you find it difficult to recruit staff?

What sector does your site serve (now and future aspirations)?

What market does your site serve (now and future aspirations)?

Is there enough capacity to meet demand at your site(s)?

### Notes:

Two warehouses rented – Soham and Exham (Suffolk border)

Finding affordable warehouse space

Lots of units towards Waterbeach but costs too much

Don't need more buildings in Cambridge, more on the outskirts – shouldn't be in the middle of any town.

Have a fulfilment centre which uses warehouses in 2 locations – because there isn't one the right size

Looking for 12,000-15,000 square feet in the next 2-3 years.

Find it difficult to find good staff – not just staff.

Online shopping

Huge shortage of storage units in Cambridge. Wasted space in Waterbeach.

**What is your view on the availability of B8 premises in the Greater Cambridge region?**

Problems / lack of availability (geographically) / max distance from Cambridge / suitable for demand

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Have you ever looked for a site in Cambridge and/or Greater Cambridge but there are none available? If so, what size of site?

Are there particular geographical regions of Greater Cambridge that lack availability? (North / East / South / West of Cambridge)

Notes:

Network partners – have to be in the CB postcode. Only location criteria.

Waterbeach – A10 is not good during rush hour. There are units that are not used.

Lots of offices not used, a lot wasted space. A11 good location – between A14 and M11. A11 is optimal location

Witchford and Ely – road network is not as good there. Road network to it

**What are your key site requirements / how do you decide on location?**

Price / size / location / nearby workforce

What are your key site requirements?

Do you see Greater Cambridge as a good strategic location, and if so, for what operations?

If you currently use a B8 space in Greater Cambridge, what are the benefits / disadvantages?

Do you see land price as a major obstacle for usage / demand of B8 space in Cambridge?

Notes:

Location – on SRN.

Wifi – really important – esp in Cambridge. Fulfillment is mainly internet based. Our communications network in Cambridge is very poor.

## **What is the future of B8 space in Cambridge?**

Good strategic location / benefits / disadvantages / price of land / potential in wider region

How important is adapting to climate change to your business? How is it impacting on your choices?

Is your business type a significant user of electricity? Now and/ or in the future?

Do you have any other thoughts on the trends in warehousing and distribution uses in Greater Cambridge?

What role do you see the Cambridge area performing relative to the wider region e.g. Peterborough, Milton Keynes etc?

### Notes:

Cambridge location very prominent – because of the new A14. Very well situated to head almost anywhere in the country. Needs to be located OUTSIDE of the city.

Then also need to be looking at restricting the towns for the certain vehicles that head into the town. Lots of the congestion is from HGV. The infrastructure of roads is not good enough.

# GCP planning – B8 engagement (discussion guide)

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## Overview

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## Discussion Guide

The main discussion topics are in **bold**. The questions beneath the free-text sections are to be used as prompts to steer the discussions in order to extract the information required from the engagement sessions.

### Company details:

Name: Prologis

Type: Logistic property specialists

### **What do your company's current operations look like in the Greater Cambridge region?**

Existing site locations (within Greater Cambridge?) / current operations / types of goods / ownership of B8 space

Nearest site location.

Do you own the site? If not, who are the operators of the site?

Are there other logistic companies that use the site?

What operations / freight movements currently take place at the site?

Where do your workers generally live? Do you find it difficult to recruit staff?

What sector does your site serve (now and future aspirations)?

What market does your site serve (now and future aspirations)?

Is there enough capacity to meet demand at your site(s)?

### Notes:

Prologis – the largest owner and developer of logistic assets – 1 billion square feet.  
Cambridgeshire – no holdings, but interested in the A1 corridor. Want sites to stand up on their own merits – satisfy themselves.

More of a fund than a developer. Timescale 5 – 10 years. Longer term view.

A1 corridor – Huntingdon/ Peterborough.

Units – they have a variety of sizes – 50,000 square feet plus. Not focused on Cambridge.

Kettering and Wellingborough – 2 units at Kettering.

A14 corridor particularly interesting. More B8 needed.

**What is your view on the availability of B8 premises in the Greater Cambridge region?**

Problems / lack of availability (geographically) / max distance from Cambridge / suitable for demand

Do you have a requirement for a site closer to Cambridge? Or a requirement for a site in Greater Cambridge in general?

How urgent is this outstanding demand for B8 space in Cambridge? Or Greater Cambridge?

What is the preferred and maximum distance from Cambridge you would operate?

Have you ever looked for a site in Cambridge and/or Greater Cambridge but there are none available? If so, what size of site?

Are there particular geographical regions of Greater Cambridge that lack availability? (North / East / South / West of Cambridge)

**Notes:**

Cambridge – high demand in city itself, but B8 is not valuable enough in the city unlike science parks.

The planning process is a limiting factor. Camb should allow more green belt development. Land assembly Stakeholder engagement.

**What are your key site requirements / how do you decide on location?**

Price / size / location / nearby workforce

What are your key site requirements?

Do you see Greater Cambridge as a good strategic location, and if so, for what operations?

If you currently use a B8 space in Greater Cambridge, what are the benefits / disadvantages?

Do you see land price as a major obstacle for usage / demand of B8 space in Cambridge?

**Notes:**

Finding B8 space in Cambridge is difficult. Opportunity for more rural logistics.

Repurposing grain stores and existing rural sites. Opportunity for agro-business and last mile carriers. Limited B8 space in Cambridg.

Clifton Road Industrial estate.

Customer employment.

Interested in finding projects where projects are needed.

## **What is the future of B8 space in Cambridge?**

Good strategic location / benefits / disadvantages / price of land / potential in wider region

How important is adapting to climate change to your business? How is it impacting on your choices?

Is your business type a significant user of electricity? Now and/ or in the future?

Do you have any other thoughts on the trends in warehousing and distribution uses in Greater Cambridge?

What role do you see the Cambridge area performing relative to the wider region e.g. Peterborough, Milton Keynes etc?

Notes:

Obvious opportunity for last mile in Camb and large B8 space in Camb.

Concern for Camb labour rates – wouldn't pick Camb to pick up. Last mile leg of logistics journeys. Trade counter use.

The businesses already in Camb will find it increasingly difficult to remain in Cambridge due to change in B8 use of space (Life sciences park).

Locational factors: first 3 things – proximity to labour, arterial roads, can I be a good neighbour (not next to houses). Power. Occupiers always over specify what they need. Grid can't support it in places – need to understand where the nearest primary subs are.

Rail connectivity – particularly interested on West Coast Mainline to Felixstowe. If strategic opportunity sits on A1 corridor not ruling anything out atm. Day vs night – Peterborough south (Huntingdon stretch) there's very little. M40 – disconnect – need space on it.

# GCP planning – B8 engagement (discussion guide)

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## Overview

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## Discussion Guide

The main discussion topics are in **bold**. The questions beneath the free-text sections are to be used as prompts to steer the discussions in order to extract the information required from the engagement sessions.

### Company details:

Name: MLH Transport

Type: General Haulier

### **What do your company's current operations look like in the Greater Cambridge region?**

Existing site locations (within Greater Cambridge?) / current operations / types of goods / ownership of B8 space

Nearest site location.

Do you own the site? If not, who are the operators of the site?

Are there other logistic companies that use the site?

What operations / freight movements currently take place at the site?

Where do your workers generally live? Do you find it difficult to recruit staff?

What sector does your site serve (now and future aspirations)?

What market does your site serve (now and future aspirations)?

Is there enough capacity to meet demand at your site(s)?

### Notes:

MLH have two warehouses at Haddenham (CB6 3BT) 6000 square feet. 2000 square feet.

80-90%. Not difficult to find workers/ staff/ big shortage for drivers – IR35. Have to use agency drivers.

No specific sector – store a bit of everything, from solar panel to archives.

45 vehicles, ranging from artics down to vans

## **What is your view on the availability of B8 premises in the Greater Cambridge region?**

Problems / lack of availability (geographically) / max distance from Cambridge / suitable for demand

Do you have a requirement for a site closer to Cambridge? Or a requirement for a site in Greater Cambridge in general?

How urgent is this outstanding demand for B8 space in Cambridge? Or Greater Cambridge?

What is the preferred and maximum distance from Cambridge you would operate?

Have you ever looked for a site in Cambridge and/or Greater Cambridge but there are none available? If so, what size of site?

Are there particular geographical regions of Greater Cambridge that lack availability? (North / East / South / West of Cambridge)

### **Notes:**

MLH growing – having to have different sites. Not enough availability to have everything together. Requested to store more. Not enough availability in the north Cambridge area.

Closer to Cambridge – Swavesey – cost is a so much more here. Equivalent

Based in N Camb – customers in this area. Location and price. Can go further north – Chatteris/ Wisby is too far.

4-5£ per square foot, in Swavesey 10-12£ per square foot.

Also transport company, need somewhere to park vehicles. A lot of the warehouses being built don't have HGV parking.

## **What are your key site requirements / how do you decide on location?**

Price / size / location / nearby workforce

What are your key site requirements?

Do you see Greater Cambridge as a good strategic location, and if so, for what operations?

If you currently use a B8 space in Greater Cambridge, what are the benefits / disadvantages?

Do you see land price as a major obstacle for usage / demand of B8 space in Cambridge?

### **Notes:**

In Ely – Lancaster Way – charging 500,000 an acre. Selling but mainly to manufacturing sites, not B8.

## **What is the future of B8 space in Cambridge?**

Good strategic location / benefits / disadvantages / price of land / potential in wider region

How important is adapting to climate change to your business? How is it impacting on your choices?

Is your business type a significant user of electricity? Now and/ or in the future?

Do you have any other thoughts on the trends in warehousing and distribution uses in Greater Cambridge?

What role do you see the Cambridge area performing relative to the wider region e.g. Peterborough, Milton Keynes etc?

Notes:

Camb – location v good. A lot going on in the area. Cover a lot of the other counties. Esp into London. Suffolk, Norfolk, Lincolnshire.

Peterborough – competitive, good location. But MLH based in Cambridge. All the staff etc want to stay in north Cambridge area.

CC – put solar panels on there warehouses. Don't own the warehouses. Moved from Witchford, then another site in Witchford. Outgrowing Haddenham, picking other areas. Additional warehouse spaces.

What needs to happen: More land available for growth for B8 space/ warehousing. The demand is definitely there. Lots of housing, not looking at warehousing.

## GCP planning – B8 engagement (discussion guide)

---

### Overview

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### Discussion Guide

The main discussion topics are in **bold**. The questions beneath the free-text sections are to be used as prompts to steer the discussions in order to extract the information required from the engagement sessions.

#### Company details:

Name: Tritax

Type: Logistic property specialists

#### **What do your company's current operations look like in the Greater Cambridge region?**

Existing site locations (within Greater Cambridge?) / current operations / types of goods / ownership of B8 space

Nearest site location.

Do you own the site? If not, who are the operators of the site?

Are there other logistic companies that use the site?

What operations / freight movements currently take place at the site?

Where do your workers generally live? Do you find it difficult to recruit staff?

What sector does your site serve (now and future aspirations)?

What market does your site serve (now and future aspirations)?

Is there enough capacity to meet demand at your site(s)?

#### Notes:

Portfolio of 4000 acres. 40,000mil space in UK.

Camb not area currently got a site in. In periphery. Reason: lack of land for B8 as a general rule. Employment land seen as big, 10 hectares seen as small for B8 space. Biggleswade – closest site.

Quite a lot along the M40 corridor – Oxfordshire/ central Beds.

Manufacturing taking a lot of space – Amazon, currently at 35% of market take up.

Online delivery. Now integral to the UK.

Shouldn't lose focus of other employment opportunities. Manufacturing etc. R&D in warehouses. Create huge number of jobs.

One issue: might think they have lots of employment land, but many constraints mean that there aren't the big tracts of land. 25-60 acres. Means they'll have to use worse quality land, move abroad etc. Huge demand for these big tracts of land.

Struggle for logistics land – footloose nature, wrong jobs, don't want it here. But we all still have

DPD – taken their Bicester site, to be main hub for Oxford.

### **What is your view on the availability of B8 premises in the Greater Cambridge region?**

Problems / lack of availability (geographically) / max distance from Cambridge / suitable for demand

Do you have a requirement for a site closer to Cambridge? Or a requirement for a site in Greater Cambridge in general?

How urgent is this outstanding demand for B8 space in Cambridge? Or Greater Cambridge?

What is the preferred and maximum distance from Cambridge you would operate?

Have you ever looked for a site in Cambridge and/or Greater Cambridge but there are none available? If so, what size of site?

Are there particular geographical regions of Greater Cambridge that lack availability? (North / East / South / West of Cambridge)

#### **Notes:**

Demand is definitely there – if it comes from 30 mins or 3 hours.

Have to allocate some employment land for these units, otherwise going to increase traffic and congestion on SRN around the city.

Cost – dictated by the market – land will be more expensive

### **What are your key site requirements / how do you decide on location?**

Price / size / location / nearby workforce

What are your key site requirements?

Do you see Greater Cambridge as a good strategic location, and if so, for what operations?

If you currently use a B8 space in Greater Cambridge, what are the benefits / disadvantages?

Do you see land price as a major obstacle for usage / demand of B8 space in Cambridge?

Notes:

For big operators – price isn't a massive factor. Just need the availability of the land.  
A1, M11, A14

### **What is the future of B8 space in Cambridge?**

Good strategic location / benefits / disadvantages / price of land / potential in wider region

How important is adapting to climate change to your business? How is it impacting on your choices?

Is your business type a significant user of electricity? Now and/ or in the future?

Do you have any other thoughts on the trends in warehousing and distribution uses in Greater Cambridge?

What role do you see the Cambridge area performing relative to the wider region e.g. Peterborough, Milton Keynes etc?

Notes:

## GCP planning – B8 engagement (discussion guide)

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### Overview

The Greater Cambridge Employment Land and Economic Development Evidence Study (GL Hearn with Icen Projects Ltd, 2020) identified a need for additional small and mid-sized B8 (Storage and Distribution) floorspace across Greater Cambridge to 2041. Therefore, WSP, on behalf of Greater Cambridge planning colleagues, are seeking to undertake some high-level industry engagement to provide an understanding of the nature of demand for B8 commercial premises (across the area), to feed into the evidence base of the emerging Greater Cambridge Local Plan.

### Discussion Guide

The main discussion topics are in **bold**. The questions beneath the free-text sections are to be used as prompts to steer the discussions in order to extract the information required from the engagement sessions.

#### Company details:

Name	<i>Zedify</i>
Type	<i>Zero emission/ last mile delivery service</i>

#### **What do your company's current operations look like in the Greater Cambridge region?**

Existing site locations (within Greater Cambridge?) / current operations / types of goods / ownership of B8 space

Nearest site location.

Do you own the site? If not, who are the operators of the site?

Are there other logistic companies that use the site?

What operations / freight movements currently take place at the site?

Where do your workers generally live? Do you find it difficult to recruit staff?

What sector does your site serve (now and future aspirations)?

What market does your site serve (now and future aspirations)?

Is there enough capacity to meet demand at your site(s)?

#### Notes:

Hub near science park on Cowley Road. Acts as a gateway.

Services: only mile. Most go back to the hub. Lunch time cut off.

Also work with FedEx, who can drop off at the hub. Also work with local shops to connect in with city.

Building is around 10,000 square feet. Cross docking -storage of vehicles. Only a small bit of micro consolidation.

Critical they're close the city centre.

Got kicked out the last hub because more valuable as a block of flats.

**What is your view on the availability of B8 premises in the Greater Cambridge region?**

Problems / lack of availability (geographically) / max distance from Cambridge / suitable for demand

Do you have a requirement for a site closer to Cambridge? Or a requirement for a site in Greater Cambridge in general?

How urgent is this outstanding demand for B8 space in Cambridge? Or Greater Cambridge?

What is the preferred and maximum distance from Cambridge you would operate?

Have you ever looked for a site in Cambridge and/or Greater Cambridge but there are none available? If so, what size of site?

Are there particular geographical regions of Greater Cambridge that lack availability? (North / East / South / West of Cambridge)

**Notes:**

No idea. In August 3x FedEx. Will be at capacity in August as FedEx are increasing usage by 3x.

B8 Classification change. Most operations can happen in light industrial space.

Operate in the city and the close by villages.

Where they are now is perfect. Close to the A14. They have to be located inside Cambridge.

**What are your key site requirements / how do you decide on location?**

Price / size / location / nearby workforce

What are your key site requirements?

Do you see Greater Cambridge as a good strategic location, and if so, for what operations?

If you currently use a B8 space in Greater Cambridge, what are the benefits / disadvantages?

Do you see land price as a major obstacle for usage / demand of B8 space in Cambridge?

**Notes:**

Location – very important. Electrical, charging, access.

**What is the future of B8 space in Cambridge?**

Good strategic location / benefits / disadvantages / price of land / potential in wider region

How important is adapting to climate change to your business? How is it impacting on your choices?

Is your business type a significant user of electricity? Now and/ or in the future?

Do you have any other thoughts on the trends in warehousing and distribution uses in Greater Cambridge?

What role do you see the Cambridge area performing relative to the wider region e.g. Peterborough, Milton Keynes etc?

Notes:

Great if the GCP did clean air zone. Climate change, NOx emissions.

No demand for more B8 space in the region.