

Development Strategy

Topic Paper

Appendix 9: Review of issues raised
by promoters of employment sites



Greater Cambridge Local Plan

Topic Paper published as part of the Proposed Submission
Local Plan - Regulation 19 consultation (August 2026 -
September 2026)



Development Strategy Topic Paper 2026 Appendix 9: Review of issues raised by promoters of employment sites

Introduction

- 1.1 More detailed site-specific economic cases were included by the promoters of a number of employment-led sites as part of their Call for Sites submissions. These cases are assessed below. The assessments draw on input from Iceni Projects where it relates to the evidence they have prepared to inform the development of the Greater Cambridge Local Plan.
- 1.2 This appendix includes a response to site-specific economic case submissions made during the plan-making process, including those submitted to the Draft Plan consultation. As such it supersedes Greater Cambridge Local Plan Draft Plan Strategy topic paper Appendix 6.
- 1.3 Note that while this appendix includes responses to submissions made prior to Draft Plan regarding the overall need for industrial and warehousing, points on this topic raised by submissions to the Draft Plan consultation, and the response to them, is included in the Review of economic data, context and representations 2026, and is not included within this Appendix.

Review of issues raised by promoters of employment sites

Cambridge urban area

Site: Land on north side of Station Road, Cambridge (id: 40133)

Summary of employment land proposals

2.1 Three scenarios are presented in the vision document. One is do nothing and the other 2 are different scales of redevelopment. Scenario 1: Retention of the Salisbury Villas with new development to the rear. Scenario 2: Demolition and redevelopment of the Salisbury Villas.

Wider economic case provided in submission

2.2 The Employment Needs Appraisal highlights importance of AI to national and local economy and Cambridge's key role on this. Analyses business sectors represented in the Core City District (around Cambridge Station) and highlights growing specialisms in legal and accounting, computer consultancy, publishing and HQs. Supports the CPIER higher growth forecasts and cites the CPCA doubling growth commitment.

2.3 Highlights the growth in Grade A office stock in Cambridge but also the constraint in the Cambridge Station area with increases in space only available from densification. Reports research indicating the main draws for knowledge intensive businesses are: recruitment; connectivity; availability of property to grow; local amenities. Key connections to London area key. Cambridge Station area hosts major cluster of R&D, AI and business space. Demand for space is high and to maintain its position more space is required. Station area best due to clustering; supports expansion of productive industries; sustainable location and strategic approach to infrastructure

development.

Response to economic case

- 2.4 The Employment Land Review 2020 highlights the ICT and Professional Services sectors as key sectors for the Greater Cambridge economy. It also highlights the increasing draw for this sector to be located close to a train station with connectivity to London.
- 2.5 The Employment and Housing Evidence 2025 (EHEU 2025) and Greater Cambridge Growth Sector Study 2024 identify that with commitments there is no overall quantitative need in the plan period 2024-45 for additional office/R&D space for use by businesses in the ICT and professional services sectors, albeit there is a need for smaller scale space. Additional office/dry lab supply for ICT and Professional Services is identified in the plan at North East Cambridge, with direct access to Cambridge North Station, and at other sites including Cambridge East.
- 2.6 It is considered that there are potential alternative locations beyond Cambridge Train Station that would be attractive to knowledge-based businesses where they are in a sustainable location that would also enable clustering. The Housing and Employment Land Availability Assessment identifies concerns with the proposals with regard to the impact of the development on a designated heritage asset.
- 2.7 It is proposed that the site continue to be part of the Hills Road and Regent Street Corridor PR1A area (S/PR1A/HRRS).

Edge of Cambridge: Green Belt

Site: Land south of Fulbourn Road and north of Worts Causeway, known as Cambridge South East (id: 40058)

Summary of employment land proposals

2.8 The proposals include:

Option 1: 7.5ha incremental expansion of Peterhouse Technology Park

Option 2: 18.5ha Peterhouse Technology Park Strategic Expansion Other options are for mixed use development.

Wider economic case provided in submission

2.9 The submission states that the success of the Cambridge economy is built on a spatial concentration of activity in the centre and fringe of Cambridge City itself: a pattern typical of clusters of high value, knowledge- based activities. Employment growth has been less effective where the attempt has been made to disperse it to locations outside Cambridge beyond the Green Belt. The Council's spatial strategy for growth needs to work with the grain of the local economy. Many existing premises are full and there is high demand for additional floorspace (evident through waiting lists); businesses typically wish to be located close to Cambridge to take full advantage of links to the University, labour market and other businesses - supported by the fact that virtually all research organisations in the Cambridge cluster are found within the city centre. Few research organisations are located outside of Cambridge. Limited housing is affordable within walking/cycling distance.

2.10 Research by Bidwells: companies want to grow and remain in Cambridge and office space in the city centre is being increasingly converted for residential use, including student accommodation, further increasing demand for floorspace which is available for commercial use. To maximise the benefits that companies gain from being located in or near Cambridge, including access to a highly

skilled labour force, other businesses and the university, employment land needs to be located if not in the city then as close as possible, i.e. on the edge of Cambridge.

Response to economic case

2.11 The Employment and Housing Evidence 2025 (EHEU 2025) and Greater Cambridge Growth Sector Study 2024 identify that with commitments there is no overall need in the plan period 2024-45 for additional office/R&D space, albeit there is need for smaller scale space. It also states that the sites identified within the emerging plan will be able to meet the identified needs, including for example CB1, North East Cambridge (notwithstanding the uncertainty regarding its delivery) and Cambridge East.

2.12 Given the Councils' supply position for office and R&D, and that the Proposed Submission Plan provides further supply focused in locations outside of the Green Belt that would be attractive to knowledge-based businesses where they are in a sustainable location and support cluster development, it is considered that general development needs for employment space do not provide the justification for exceptional circumstances required for Green Belt release. The Housing and Employment Land Availability Assessment also highlights environmental impacts, which have been considered separately.

Site: Land at South Trumpington, Employment and housing needs case, Volterra, for British Land (id: 40048)

Summary of employment land proposals

2.13 The submission presents three scenarios:

- Scenario 1 – 260,000 sqm commercial, c. 400 homes
- Scenario 2 – 225,000 sqm commercial, c.400 homes
- Scenario 3 – 130,000 sqm commercial, c. 1000 homes

2.14 The submission states the site will deliver a mixed use urban extension, mix of uses including floorspace for a wide range of jobs (Offices, Science & Technology, Research & Development, Mid-tech), a range of housing types including affordable and/or essential worker housing, community facilities, mobility hubs and complementary retail and workspace. 3,800 to 6,700 new jobs on completion.

Wider economic case provided in submission – prior to Draft Plan stage

2.15 In the submitted 'Employment and housing needs case 2025' (Volterra) argues that suppressed demand has not been considered as a factor in future R&D needs in the EHEU 2023.

2.16 The representation evidence considers that the EHEU 2023 estimates focus on net additional floorspace but overlooks the need for gross completions to replace ageing or converted stock. The supply side is also considered overly optimistic.

Wider economic case provided in submission – Draft Plan consultation response

2.17 The submission outlines concerns around the industrial floorspace requirements believing the 317,000 sqm identified to be a minimum figure of need. It is critical of the assumption that only 10% of industrial floorspace need (c.32,000 sqm) should be allocated to mid-tech uses and argues that this should be higher in acknowledgement of long term under provision.

Response to economic case

2.18 The EHEU 2023 and EHEU 2025 draw on PPG compliant modelling techniques to arrive at future estimates of need, including labour

supply, demand, floorspace completions and market trends. This includes a 'policy on' set of growth scenarios for R&D growth that are substantially above the baseline, being influenced by past labour trends.

2.19 Icenis is aware of the suppressed demand model. In Icenis's view this is most practically applied to industrial markets, which have structural / population related demand, whereas labs see greater demand volatility subject to research funding and cyclical events; and are considered to link more directly to employment growth, as modelled in the EHEU 2023 / EHHU 2025. Suppressed demand calculations are also highly sensitive to the inputs used (as noted by Volterra in their Economic and Employment Needs Assessment for Huntingdonshire District Council 2025 para 20.5, which ultimately does not pursue this model). During 2020-22 labs supply fell considerably short of demand, however at 2025 the availability rate has risen to over 12%, of which 10% are Grade A (Bidwells Cambridge Offices and Labs Market Databook July 2025).

2.20 Regarding the replacement of stock, the R&D gross and net figures are within 15% of each other (EHEU 2023 table on pg 89), suggesting losses are relatively limited, and the difference between them is less than the flexible margin and vacancy adjustment applied (EHEU 2023 pg 90). Planning solely for a gross model ignores the potential of on-site recycling. The EHEU 2023 also notes the inclusion of hospital related R&D space in the trend, which uniquely increase the figures. A proliferation of older R&D space has not been raised through research undertaken by Icenis in recent years, for example, through the Greater Cambridge Growth Sectors Study: Life science and ICT locational, land and accommodation needs 2024. It is not clear to stock age in the Volterra Employment and housing needs case March 2025 para 4.12 are for R&D or wider stock counts.

- 2.21 Regarding supply, the EHEU 2023 and EHEU 2025 make a 2 year allowance for flexibility which is in part to allow for delays in sites coming forward. In addition, the EHEU 2025 reports (table 5.7) a R&D supply surplus of 107,144 sqm plus a further 229,000 sqm of additional R&D and office space permitted since the April 2024 monitoring. Therefore, there is considerable headroom in the supply side.
- 2.22 Mid-tech activity is not a discrete use class and overlaps with wider industrial and R&D functions, meaning that its quantification is inherently uncertain. The application of a circa 10% share provides a proportionate allowance based on demonstrable evidence, whilst avoiding the risk of double counting demand already captured within broader industrial requirements.
- 2.23 Given the Councils' supply position for office and R&D, and that the Proposed Submission Plan provides further supply focused in locations outside of the Green Belt that would be attractive to knowledge-based businesses (including for mid-tech) where they are in a sustainable location and support cluster development, it is considered that general development needs for employment space do not provide the justification for exceptional circumstances required for Green Belt release. The Housing and Employment Land Availability Assessment also highlights environmental impacts, which have been considered separately.

Site: Land north of A14 and south of Milton Road, Impington (id: 40096)

Summary of employment land proposals

- 2.24 Cambridge Science Park North (CSN) would be an expansion of the Cambridge Science Park (CSP) up to around 185,000 m² to

principally provide Mid-tech space.

Wider economic case provided in submission – prior to Draft Plan

2.25 The submission states that the site would create world leading centre of excellence in skilled manufacturing & development, and jobs in industry sectors needed to expand and diversify Cambridge economy. It would create well paid jobs in local companies that do not require a university education. It is close to CRC and more deprived areas of Greater Cambridge and has significant scope for apprenticeships.

2.26 There is a need to be able to foster and promote new areas of science to maintain Cambridge's worldwide reputation. Proximity to CSP would enable benefits of clustering/ agglomeration – supply chain, market access, collaboration – key ingredients to success of tech clusters. CSP has the supporting infrastructure to facilitate cluster benefits. Clusters needs to be created planned way to enable growth. The site would benefit from close links and global brand of CSP. It would need to remain close to Cambridge for proximity to University and other like-minded businesses.

2.27 Growing numbers of companies in science and tech sectors require manufacturing and prototyping space – mid tech space. This larger flexible footplate is not available at CSP or within the local market with land lost to residential and denser employment uses. Mid-tech space is under supplied but in high demand. Generally, on city fringes, existing sites in Cambridge do not meet requirements. High and mid tech sectors highly productive and strong exporters. 3 scenarios of growth modelled based on previous growth indicate need of between 80,000m² and 450,000 m².

Wider economic case provided in submission – Draft Plan consultation

response

- 2.28 The submission focuses on the need for mid tech premises, defined as “hybrid workspaces that support the growth of several of Cambridge’s key sectors ... flexible industrial-format spaces that allow businesses to combine R&D functions (including wet/dry labs), prototyping and testing, and related activities such as assembly, storage, distribution and “write-up” space within a single facility.”
- 2.29 The submission notes that of the 317,000 sqm of broadly classified industrial / warehousing space the Icen report notes that 10% of this could go to mid-tech – which is based on past trends but considered inadequate. This is considered to be underestimated. Volterra consider that market signals strongly suggest that Greater Cambridge’s mid-tech and wider industrial market remains supply-constrained. Volterra refer to other examples of Icen’s work where suppressed demand is modelled in - Leicester & Leicestershire: “Strategic B8 Needs Sensitivity” report in 2024 and “West Midlands Strategic Employment Sites Study 2023/24”. Accounting for suppressed demand would see the need for industrial space increase to between 420,000 sqm and 525,000 sqm over the plan period.
- 2.30 The reps state how Cambridge Science Park North responds to the qualitative locational and accommodation requirements reported in the Greater Cambridge Growth Sectors Study including in terms of accessibility and location; proximity to clusters and growth areas: a place-based business destination: and space for start-ups and scale-ups.
- 2.31 Volterra note a supply gap against the need for industrial space of 288,000 sqm, indicating a substantial shortfall in provision.

Response to economic case

- 2.32 Iceni has undertaken in depth analysis of the range of industrial needs in the sector, including mid tech, within the Greater Cambridge Warehouse and Industrial Space Needs 2025 report (WISN 2025). As Volterra acknowledge, this “is one of the first planning evidence studies to explicitly carve out mid-tech as a category within industrial land needs” which demonstrates the LPAs’ efforts to understand business needs in this sector. The WISN 2025 is not only based on data analysis but wide engagement with businesses and stakeholders. The report identifies around 10% of current space in mid tech, but that manufacturing, which also crosses over with this space, is around 25%.
- 2.33 In preparing that report Iceni visited a number of mid tech occupiers to further understand the requirements and spoke to a range of stakeholders. The views on the need for mid-tech space were mixed – see paragraph 5.9 – including ‘much more muted requirements’.
- 2.34 Table 7.5 of the Iceni 2025 Industrial Space Needs creates a notional need by type but in reality across the substantial 317,000 sqm the LPA would not control the final occupier mix that could include a higher proportion of mid tech space subject to market forces.
- 2.35 The WISN reports that to meet this need there is planned additional provision at Cambridge Research Park and Bourn and some elements at Sawston. It also note that an additional edge of centre location with closer city proximity and links would be preferable, or ensuring enhanced connectivity to current and future proposals, and that emerging plans for mid-tech at Eddington (as identified in the draft plan) meet this sub sector’s broad locational requirements as far as identified in the study.

Conclusion

- 2.36 Iceni’s research has not highlighted sufficient need for the scale of

development proposed at Cambridge Science Park North, and there are other more appropriate sites that can meet the identified need. Therefore it is considered that there is no justification for exceptional circumstances required for Green Belt release. The Housing and Employment Land Availability Assessment also highlights environmental impacts, which have been considered separately.

Rural Southern Cluster

Site: Land east of M11, west of Duxford (id: 40095)

Summary of employment land proposals

- 2.37 AvTech1 (phase 1), a smaller site that crosses the western boundary of the Imperial War Museum site, which includes 45,000 to 52,000 sqm specialist employment space, plus up to 13,000 sqm IWM LAB space, with an overall range between 58,000 and 65,000 sqm of specialist employment space.
- 2.38 AvTech2 (phase 2), which lies to the east of the M11 and the south of the A505 and is part of a sustainable extension of Duxford Village for 800 new homes, associated social infrastructure, green links from Whittlesford Parkway to IWM Duxford and a new 40 ha country park, with the updated submission amended to also deliver circa 70,000 sqm specialist employment space.
- 2.39 The two sites form part of an overall plan for a mixed-use development to the East of the M11. It is proposed that the new jobs will be largely within a proposed centre of excellence for UK aviation research and development. Representations note the strategic importance of the proposed Duxford AvTech economic cluster. AvTech as a whole is considered a golden opportunity for Cambridge and the UK to be a global leader and innovator.

Wider economic case provided in submission

2.40 The submission states that there is a clear gap in the market with no established centre for excellence for firms developing new technologies in the General Aviation and Urban/Advanced Mobility sectors that specialise in sustainable and carbon friendly forms of affordable aviation in the UK. There are however centres abroad therefore this is an urgency for similar in the UK. Avtech at Duxford is a special case as there is already a strong concentration of aviation and aerospace businesses in and surrounding Cambridge and in the surrounding region however, the new proposal would provide a currently unfulfilled focus for clustering, with the recognition of aerospace cluster in the new Modern Industrial Strategy. It would also be close to key supporting tech sector businesses. The IWM and Cambridge brands would be attractive to potential tenants. The University of Cambridge would be interested in locating some R&D there and there is business support for the proposal. The Government has identified aviation as a key sector. There is synergy between the AvTech and IWM proposals, aiding the protection of the future of IWM Duxford.

Response to economic case

2.41 The EHEU 2025 reports a combined need of 317,000 sqm of industrial space for the 2024-45 plan period based on past take up. According to the Greater Cambridge Warehouse and Industrial Space Needs 2025 report, this notionally should include around 48,000 sqm of manufacturing / advanced manufacturing and 32,000 sqm mid tech (table 0.3). The Duxford proposals would potentially fall into the former category, but given the uniqueness of the proposal, are unlikely to be captured in past take up. If the facility is largely dedicated to a sole form of specific R&D / testing, and not a wider market, then it would largely not be reflected in the 317,000 sqm of past take up derived need.

- 2.42 The proposals appear to be a unique R&D / advanced manufacturing and testing facility in aviation technology. This includes 58,000 - 65,000 sqm of specialist employment space in phase 1 and c.70,000 sqm in phase 2.
- 2.43 Following consideration of the proposals, the Councils consider that the Avtech aviation related employment uses could be complementary to the existing Imperial War Museum, being a major tourist / visitor attraction, educational, commercial and aviation facility and an important employment site for aviation. As such, it is considered that there is merit in expanding the boundary of Policy S/AMC/IWM: Imperial War Museum to include the Avtech 1 site (the western parcel), to enable proposals to come forward via a policy compliant detailed planning application, if a firm proposal was developed. However, the Councils note that the proposed aviation technology cluster is extremely nascent and it is not considered that there is a sufficiently strong economic case to allocate Avtech 2 land which lies to the east of the A14. The Housing and Employment Land Availability Assessment also highlights environmental impacts, which have been considered separately.
- 2.44 Policy S/AMC/IWM: Imperial War Museum, Duxford recognises the Imperial War Museum as a major tourist / visitor attraction, educational, commercial and aviation facility and an important employment site for aviation. It states that additional facilities for this specific use would complement the role and function of the airfield and businesses within the site. The policy area boundary has also been expanded from that included in the South Cambridgeshire Local Plan 2018 to include Site 1 AvTech. This will provide support for potential Avtech development in this location if it were to come forward.

Site: Land to east of A1301, Hinxton and north of A505, near Whittlesford (id: 40441 (in total), 52057 (Option 1), 52058 (Option 2) and 52059 (Option 3))

Summary of employment land proposals

2.45 The development of an AgriTech technology park comprising up to 112,000 m² (gross) employment floorspace including office, laboratory and workshop space, central facilities, demonstration plots and field trial facilities.

Wider economic case provided in submission

2.46 The site submission directs the reader to the submitted planning application S/4099/17/OL. AgriTech is key growth sector in UK. An enabling sector in tackling global challenges e.g. malnutrition, food security. The UK and East of England are well known for world class research base in food and drink sector but poor at commercialisation – not fully exploiting a potential market.

2.47 Proposed site creates potential to increase technology exports and reduce need for imports. It would be UK's first bespoke AgriTech Technology Park and help to deliver local and national policies. Location within area of internationally renowned science parks would help to generate innovation as opportunities to bring together life science and AgriTech companies. Also, within East of England, with significant concentration of crops and plant science excellence, and within several innovation corridors and an area with the highest concentration of farmland in the UK.

2.48 Co-location/clustering is key to delivering collaboration and commercialisation. Knowledge transfer and research collaboration strongly influenced by distance. Campus environment with central facilities fosters informal networks and knowledge sharing. A critical mass is required to maximise opportunities for open innovation.

2.49 An assessment of sites does not identify alternative site of this nature and scale within South Cambridgeshire or the region.

Response to economic case

2.50 The Employment Land Review considers key economic clusters within Greater Cambridge. It concludes that whilst there are Agri-Tech strengths across the wider region, the concentration is less distinctive in Greater Cambridge and clustering is less apparent compared to other sectors.

2.51 It refers to the Inspector's findings from the appeal on planning application S/4099/17/OL where it is considered and accepted that AgriTech businesses occupy a range of existing business parks or locations and the cluster is dispersed throughout the area, which is not dependent on, nor does it require, co-location on a single site.

2.52 The ELR does not identify a need for an additional site in Greater Cambridge to enable the clustering of AgriTech businesses. The Employment and Housing Evidence 2025 (EHEU 2025) and Greater Cambridge Growth Sector Study 2024 do not alter this position.

2.53 The Inspector for the planning appeal found that that the benefits of the proposed AgriTech park could only be realised if an effective user restriction was imposed to ensure the occupiers complied with specified AgriTech

requirements so that the development did not become a general business park, which would be of limited benefit. They went on to find that none of the proposed conditions to restrict occupation would meet the tests of necessity, reasonableness and precision, and that the absence of an appropriate mechanism to control occupation of the park diminishes the weight that can be given to the claimed benefits of the development. The need for and expected benefits of the development would be of minor significance.

2.54 The proposed development would have an adverse effect on the character and appearance of an area of substantial significance. There would also be harm to both designated and non-designated heritage assets and the loss of best and most versatile (BMV) agricultural land.

Rest of Rural Area

Site: Land north of A14, Bar Hill (id: 40244), same location also most recently submitted as Noon Folly Farm - Land North of A14 J25, Bar Hill, Bidwells for Tritax (id: 40121)

Summary of employment land proposals

2.55 Tritax Park - a mixed employment development offering commercial space and amenities to be shared with Bar Hill. The almost 300 acre site supports 250,000m² floorspace. The diversity of unit size with B2, B8 and class E provision for a range of occupiers, providing up to 4,000 on site, skilled jobs.

Wider economic case provided in submission

2.56 Tritax Park - a mixed employment development offering commercial space and amenities to be shared with Bar Hill. The almost 300 acre site supports 250,000m² floorspace. The diversity of unit size with B2, B8 and class E provision for a range of occupiers, providing up to 4,000 on site, skilled jobs.

2.57 The Tritax Park Vision Document states that there is very significant market demand for logistics space in Greater Cambridge and along the A14 corridor. Many industrial sectors are increasing the size of their units to drive efficiencies and accommodate the automation and robotics that speed their processes and secure their business. Very

large sites to accommodate these modern facilities are rare nationally and in Greater Cambridge specifically, there are no sites which could welcome a large employer.

2.58 For industrial and manufacturing uses, the Vision quotes Bidwells research which shows a current demand of around 1.2 million square feet in Greater Cambridge which requires approximately 75 acres (30 ha) to be delivered, assuming a 40% plot ratio. Additionally for storage and distribution uses, Bidwells have demonstrated current demand of around 1.5 million square feet in Greater Cambridge which requires a further 90 acres (36 ha) to be delivered.

Response to economic case

2.59 The Employment and Housing Evidence Update 2025 (EHEU 2025) recognises an increased demand for industrial and warehouse uses and recommends a future plan need of 317,000 sqm or around 79 ha at a 0.4 plot ratio, which substantially exceeds the estimates of current requirements by Bidwells, albeit for a full plan period rather than 'point in time'. However, market demand based enquiries are not always translated to take up, so there is potential for over estimation in the requirements. Take up is the primary input to the EHEU 2025 requirement, which goes on to reflect a shortfall in the current (2024 monitoring year) provision.

2.60 The EHEU 2025 work is supported by the Greater Cambridge Warehouse and Industrial Space Needs 2025 report, which looks at the typologies of demand in more detail. This recognises a requirement in the wider property market for the largest types of warehouse units, but that this is not a Cambridge specific need.

2.61 Accommodating regional and national serving operations adds further land supply pressure in an area already facing significant land supply pressures to

meet the need of specialist sectors, such as the area's key life science and technology sectors, as well as increasing pressure on transport networks. As such, a policy position has been taken that proposals for larger warehouse spaces should not be accommodated in Greater Cambridge, but that the local plan should provide land for industrial and smaller warehousing space meeting Cambridge-specific needs.

2.62 This site was assessed through the Housing and Employment Land Availability Assessment, and was taken forward for further consideration as a strategic site in a priority location for this sector. The site was not preferred, noting its archaeology and landscape impacts, flooding and access issues.

Site: S/SHF Land north of A1307, Bar Hill (Slate Hall Farm) (id: 40248)

Summary of employment land proposals

2.63 The proposal is for a major (100+ ha) industrial development of a range of approximately 230,000 sqm of employment floorspace for E(g), B2 and B8 uses, and to include a mobility hub and country park. The site lies outside the Green Belt to the north of the A14 between the Bar Hill and Oakington junctions, and close to Northstowe.

Wider economic case provided in submission

2.64 The economic case is made that the industrial market is characterised by a lack of stock in part due to a lack of previous allocations and as a result of the conversion of sites in Cambridge to residential uses. There is positive demand for this space, although this has been tempered by lack of availability, particularly of larger premises. Much of the growth is driven by growth in knowledge-

based businesses that need a supply chain operating from E(g), B2 and B8 premises. The CPIER report is cited indicating that growth is actually going to be higher than ONS forecasts. Sites within clusters should be prioritised for knowledge intensive businesses with sites outside these areas allocated for more footloose businesses. The A14 is cited as a favoured

location due to motorway connections and access to a labour close by. Considers that the allocation of this site would support the CPIER target. Updated submissions from Lichfields indicate the need a further increase in the requirement for warehousing with significantly greater levels of provision needing to be identified.

- 2.65 Additionally, the submission critiques the Employment and Housing Evidence Update 2023 (EHEU 2023) in suggesting it does not consider strategic distribution requirements across the Functional Economic Market Area (FEMA) or the Property Market Area (PMA) within which Greater Cambridge is located and where there is further need for B8. It focuses solely on the “indigenous” requirements of Greater Cambridge. Lichfields considers the absence of logistics space and distribution-based sectors as a “key sector” is considered to represent a major omission.

Response to economic case

- 2.66 The latest evidence for the Local Plan being the EHEU 2025 sees an increased need for industrial and warehouse premises for Greater Cambridge for the 2024-45 plan period being a need of 317,000 sqm derived from an absorption based model. This is broadly central to the Lichfields range of 276,000 sq.m and 342,500 sq.m for a 21 year period.
- 2.67 The EHEU 2025, EHEU 2023 and preceding studies have examined the key sectors driving the Greater Cambridge economy in detail through analysis and engagement. Logistics space and distribution-

based sectors have not been identified as one of these.

2.68 It is recognised that the Planning Practice Guidance (PPG) sets out how authorities can assess the need for and allocate space for logistics (Paragraph: 031 Reference ID: 2a-031-20190722). As per guidance, the EHEU 2023 reports on the engagement with stakeholders and market signals analysis; and suitable and considerable provision has been recommended for industrial and warehousing space for Greater Cambridge in the EHEU 2025. A wider study

has not been undertaken across the FEMA as a whole to consider the future need and potential distribution of strategic facilities.

2.69 Accommodating regional and national serving operations adds further land supply pressure in an area already facing significant land supply pressures to meet the need of specialist sectors, such as the area's key life science and technology sectors, as well as increasing pressure on transport networks. As such, a policy position has been taken that proposals for strategic facilities should not be accommodated in Greater Cambridge, but that the local plan should provide land for industrial and smaller warehousing space meeting Cambridge-specific needs.

2.70 This site was assessed through the Housing and Employment Land Availability Assessment, and was taken forward for further consideration as a strategic site in a priority location for this sector. It is included as an allocation in the Proposed Submission Plan, noting in particular its access to labour market and to Cambridge.

Site: Brickyard Farm, Boxworth Farm, Boxworth, Stantec on behalf of Newlands (id: 47353)

Summary of employment land proposals

2.71 North west of the A14 Services site is being promoted for development for an increase in floorspace density from the original submission's Class B8 Storage and Distribution, and increased area of green and blue infrastructure/open space. A green logistics cluster of up to 1.5 million sq.ft of floorspace, with support for over 1,900 FTE jobs per annum.

Wider economic case provided in submission

2.72 Representations note that, over the last 10 years, job growth in logistics has been two times faster than that of the wider economy. Logistics is also a fundamental enabler of growth. Advanced manufacturing, life sciences, R&D and construction are all identified as key growth sectors in the Cambridgeshire and Peterborough Local Industrial Strategy (July 2019) with all requiring supply chain support as part of their operations.

2.73 Savills confirmed that there are 43% less large units in Greater Cambridge compared to the national average with a 0% availability rate for large units (>100,000 sq ft). The need to allocate more land for storage and distribution uses in the right locations in Greater Cambridge is reinforced by several existing employment sites, which contain these uses, either being re-developed for residential/life sciences.

2.74 Need is considered to be far greater than stated in Icenis's 2023 report, much of the supply of which has been consumed for alternative employment uses. There is a very significant unmet need to be allocated for.

Response to economic case

2.75 The latest evidence for the Local Plan being the EHEU 2025 sees a substantially increased need for industrial and warehouse premises

for Greater Cambridge for the 2024-2045 plan period compared with the EHEU 2023, driven largely by market signals for industrial and warehousing premises (take up based). This is also in recognition of the importance of the sector as a facilitator of supporting growth in other sectors, and encompasses warehousing, distribution, mid tech and manufacturing. It takes into account detailed market research in a separate study Greater Cambridge Warehouse and Industrial Space Needs 2025 which highlights the need for more industrial spaces across Greater Cambridge, although this also reflects that the need for the largest warehouse spaces is not Greater Cambridge specific.

2.76 Accommodating regional and national serving operations adds further land supply pressure in an area already facing significant land supply pressures to meet the need of specialist sectors, such as the area's key life science and technology sectors, as well as increasing pressure on transport networks. As such, a policy position has been taken that proposals for larger warehouse spaces should not be accommodated in Greater Cambridge, but that the local plan should provide land for industrial and smaller warehousing space meeting Cambridge-specific needs.

2.77 This site was assessed through the Housing and Employment Land Availability Assessment, and was taken forward for further consideration as a strategic site in a priority location for this sector. It was not preferred because it would not provide additional land for HGV parking in a location that is well located for the adjacent A14 Services, and development of unused greenfield land would form a large area of this site. There are other sites considered more appropriate in the area.

Site: Scotland Farm, Dry Drayton (id: 51607)

Summary of employment land proposals

2.78 10,000m² of flexible employment space alongside a petrol filling station with associated ancillary uses in connection with proposed Scotland Farm Park and Ride Facility, together with open space and associated infrastructure.

Wider economic case provided in submission

2.79 The devolution commitment to doubling the economic output of the area (over 25 years) needs to be a factor at the heart of the Plan. A wide variety of space by location, size, function and price needs to be available. Flexible commercial space in urban and rural areas to support growth of local businesses and strengthen opportunities for local supply chains. Cambridge lacks a distribution hub where goods are consolidated into loads for last mile (5 mile) delivery, thereby reducing the volume of HGVs moving in and through the city and reducing air pollution. Locations with high levels of public transport access should be identified for businesses with high employment densities. Non-knowledge intensive businesses are more footloose and typically locate where premises are rather than building bespoke premises, while some companies expand from humbler often rural beginnings in converted buildings. Deeper networks on smaller clusters on the periphery of Cambridge could help to spread the Cambridge effect.

Response to economic case

2.80 The Employment and Housing Evidence 2025 (EHEU 2025) and Greater Cambridge Growth Sector Study 2024 identify that with commitments there is no need in the plan period 2024-45 for additional office/R&D space, albeit there is need for smaller scale space. Preferred locations for industrial sites are both in reasonable proximity to the city itself, enabling commuting and potential access to customers, as well as in the wider city hinterland, with good

accessibility.

2.81 A number of site allocations have been proposed that fulfil these needs, therefore it is not considered that the exceptional circumstances exist to remove this site from the Green Belt.

2.82 This site was assessed through the Housing and Employment Land Availability Assessment, but it was not taken forward for further consideration. Factors considered in this assessment include landscape and heritage impacts, flooding and accessibility.

Site: Land to the west of Stirling Way, Papworth Everard (Parcel C) (id: 40429)

Summary of employment land proposals

2.83 The submission comprises 3 parcels of land in Papworth. Site C is proposed as an extension to the Business Park with B1, B2 and B8 uses. The site area is 4.28ha. The other 2 parcels are proposed for residential and an extension to the primary school.

Wider economic case provided in submission

2.84 With the relocation of Papworth Hospital there is a need to redress the balance between housing and jobs. There is a market demand to increase the amount of employment floorspace in the submitted location. The business park is an attractive area for businesses with the greatest demand being for light industrial uses. The business park should continue to be protected but should also include land to the east to provide for its expansion.

2.85 Flexible commercial space in urban and rural areas supports the

growth of local businesses and local supply chains. It can provide opportunities for different jobs. Availability of suitable sites and premises in excellent locations outside of Cambridge is a key factor in spreading the economic growth. Sites which support clusters are necessary and could be urban, edge of town or rural. Locations with high levels of public transport access should be identified for businesses with high employment densities. Non-knowledge intensive businesses are more footloose and typically locate where premises are rather than building bespoke premises. Would help to spread Cambridge effect.

Response to economic case

2.86 It is proposed to continue the Papworth Hospital Policy that seeks healthcare uses for a marketing period of no less than 2 years and, if this is not successful, other business uses compatible with this location. It is expected therefore that alternative job opportunities will become available on the former hospital site.

2.87 The latest evidence in the Employment and Housing Evidence Update 20205 (EHEU 2025) sees a substantially increased need for industrial and warehouse premises for Greater Cambridge for the 2024-2045 plan period compared with the EHEU 2023, driven largely by market signals for industrial and warehousing premises (take up based). This is also in recognition of the importance of the sector as a facilitator of supporting growth in other sectors, and encompasses warehousing, distribution, mid tech and manufacturing. There are also other employment sites coming forward in the area, and an allocation proposed at Cambourne. Development in this location would not be able to provide a substantive amount of the identified needs for industrial and warehousing, and might also compete with the potential economic success of the allocation. This site was assessed through the Housing and Employment Land Availability Assessment, but it was not taken forward for further consideration.

Factors considered in this assessment include landscape and site access.

Site: Land adjacent to A10 and Royston Road, Melbourn (id: 40262)

Summary of employment land proposals

2.88 A mixed-use scheme with a new 11 ha (approximately) Business Park (E(g) and B2 uses) as the predominant land use. Other uses include a care village, roadside services, leisure uses and battery storage.

Wider economic case provided in submission

2.89 The promoter cites strong existing office demand in Cambridge area and good demand for industrial given limited supply/designations. Cambridge is key driver of UK economy. Melbourn is considered a good location for offices due to strong public transport and highways links and existing high-tech hubs. New industrial users expected to be attracted from Royston, Cambridge and wider by the good transport links.

Response to economic case

2.90 Employment and Housing Evidence 2025 (EHEU 2025) and Greater Cambridge Growth Sector Study 2024 identify that with commitments there is no need in the plan period 2024-45 for additional office/R&D space, albeit there is qualitative need for smaller scale space; these would need to be located in locations that are well connected and within Cambridge's urban area as preference. The latest evidence for the Local Plan being the EHEU 2025 sees a substantially increased need for industrial and warehouse premises for Greater Cambridge for the 2024-2045 plan period compared with the EHEU 2023, driven largely by market signals for industrial and warehousing premises (take up based). Preferred locations for industrial sites are both in

reasonable proximity to the city itself, enabling commuting and potential access to customers, as well as in the wider city hinterland, with good accessibility.

2.91 Melbourn has two existing active employment sites identified in the ELR providing the village and its surrounding areas with a good mix of employment types.

2.92 Other sites identified in the plan are better located to meet the identified floorspace needs. The proposed site was assessed through the Housing and Employment Land Availability Assessment, but it was not taken forward for further consideration. Factors considered in this assessment include landscape and heritage impacts, flooding and accessibility.