



Growth Sites Delivery Strategy
North Norfolk District Council

Draft Final Report
August 2021

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1.0 INTRODUCTION

1.1 This Growth Sites Delivery Strategy has been prepared for North Norfolk District Council (NNDC) by BE Group and WSP.

1.2 The report provides an assessment of the supply and demand for employment land in the District, looking at the available employment allocations and existing employment areas to understand the supply side, and reviewing the property market, consulting with local stakeholders and critiquing the market to understand the demand side. The study identifies key issues affecting the delivery of employment sites, including overall market issues as well as sites specific constraints. The study provides information for Council that will help guide the delivery of key employment sites.

1.3 The aims of the study are to:

- *Assess the current supply and forecast demand for employment land in North Norfolk*
- *Identify the mechanisms, levers and stakeholder support required to unblock historic 'bottleneck' issues with sites that have the capacity to provide much needed growth space for indigenous businesses and support potential inward investment opportunities;*
- *Provide essential background to inform business investment decisions, laying down the groundwork required to support future funding bids;*
- *To establish an Action Plan for each identified priority site and support the initial momentum to deliver.*

1.4 The study is in two stages – Stage One providing the background analysis of the market and employment sites and Stage Two providing an Action Plan for the delivery of the priority employment sites. This document covers both stages of the study

Methodology

1.5 BE Group and WSP used a range of research techniques in the course of this study. Research methods used include site visits, face-to-face meetings and telephone interviews with property market stakeholders such as developers, investors and their agents, as well as other key stakeholders, such as public sector agencies and core

employers. Desktop analysis of national, sub-regional and local reports and strategies has been undertaken.

- 1.6 An analysis of the local property market has been undertaken, including a critique of the transactions of commercial premises in North Norfolk, a review of currently marketed properties and an assessment of the types of uses within employment areas. This data was complemented with information gathered from conversations with locally active commercial agents.

- 1.7 This Strategy has reviewed the current/existing employment site allocations and existing employment areas through site inspections, reference to Council's annual employment land monitoring, conversations with landholders/agents as appropriate and review of planning applications/permissions. The existing employment site allocations and existing areas have been catalogued and critiqued. The key market and physical constraints for the sites have been identified with guidance and recommendations provided for the delivery of the priority sites, including Action Plans and indicative layouts and construction costs as to how the sites might be developed.

2.0 POLICY CONTEXT

Introduction

- 2.1 This section focuses on national, regional and local reports that have a relevance to the allocation of employment land and premises.

National and County Documents

- 2.2 The following table summarises the key national and regional documents that inform or influence the property market in North Norfolk.

Table 1 – National and Regional Documents

Document	Details
National Planning Policy Framework, 2021	Building a strong, competitive economy: Local authorities should support existing and emerging sectors and plan positively for knowledge driven, creative or high technology clusters. Furthermore, the long-term protection of employment land should be avoided when there is no reasonable prospect of a site being developed, and allocations should be reviewed regularly.
	Ensuring vitality of town centres: Local authorities should allocate a suitable range of town centre and accessible edge of town centre sites to promote a competitive town centre.
	Supporting a prosperous rural economy: Planning policies should support rural business growth through the conversion of existing, and development of new business accommodation. Furthermore, they should support the diversification of agricultural and other land-based rural businesses.
	Plan Making and Evidence Base: Local planning authorities need to prepare and maintain a robust evidence base to understand business need within their area. This can be achieved by working with neighbouring authorities, LEPs and the local business community. This evidence base should be used to assess the need for employment land/floorspace and its sufficiency and suitability to meet identified needs. Employment land available reviews should be undertaken at the same time/combined with Strategic Housing Land Availability Assessments. The needs of the food production industry and any barriers to investment that planning can resolve should also be reviewed.
Norfolk County Employment Land Monitoring Report, 2019	Since April 2000, 357.2 ha of employment land has been developed in Norfolk County, with 8.2 ha of employment land taken up in 2018-2019. Across the County there are currently 436 ha of employment land available on monitoring sites.
	In North Norfolk specifically, since 2000, 29.1 ha of employment land has been developed. This is an increase of 0.1 ha from the previous year. The annual average employment land take-up for the District is 1.6 ha per annum. In 2018-2019, 4.2 ha of land has been lost to housing.
New Anglia Local Enterprise Partnership for Norfolk and Suffolk: Strategic Economic Plan	The New Anglia Strategic Economic Plan sets ambitious targets for the New Anglia LEP region, encompassing Norfolk and Suffolk. The plan includes housing, jobs, productivity and business growth targets to 2026. The plan identifies five high impact sectors for the region “ <i>which offer the opportunity for rapid growth in absolute terms and productivity</i> ” – advanced manufacturing and engineering, agri-tech, energy, ICT/digital culture and life sciences. These are consistent with North Norfolk’s economic strengths. It has also identified four underpinning sectors which are the largest employers in the economy aiming to support them and improve their productivity and competitiveness – agriculture and food and drink, financial and insurance services, ports and logistics and tourism and culture. This plan highlights the need to improve skills of the workforce in the region and to provide

Document	Details
	further local opportunities for graduates of the regional universities. The plan aims to align skills programmes with the requirements of local businesses to make national programmes more relevant to local needs.
The East Norfolk and Suffolk Economic Strategy 2017	The Norfolk and Suffolk Economic Strategy has highlighted achievable ambitions for the economic direction of Norfolk and Suffolk. The Strategy provides a long-term economic direction to 2036 but focuses on the actions that need to be taken over the next four years to secure long term success. These ambitions will be delivered by prioritising action and investment in the priority places. By 2036, they aim to have added £17.5bn in real terms to the economy, to have created 88,000 new jobs and 30,000 new successful businesses.
Norfolk Strategic Planning Framework, 2019	This document fulfils the requirement for Norfolk Local Planning authorities to produce a statement of common ground setting out the effective and on-going joint working across the County on strategic planning matters. It has identified that Norfolk has reacted to the economic downturn better than other areas around the UK. This is largely due to its diverse economy which is not reliant on any one sector. The economy in Norfolk, overall, is growing. This growth is driven by certain sectors of the economy where there are particular strengths and expertise such as energy, advanced engineering, tech/digital, food and life sciences.

North Norfolk District

- 2.3 The following provides summaries of policies and documents for North Norfolk District specifically.

North Norfolk Core Strategy

- 2.4 The Core Strategy (September 2008) is the adopted planning document for the District. It considers employment and housing requirements in the East, Central and West, recognising the need for an appropriate distribution of employment and housing across the District.
- 2.5 The Core Strategy provides for the following distribution of employment land across North Norfolk.

Table 2 – Employment Land in Core Strategy

Area	Employment Land (ha)
Eastern Area	91
North Walsham	65
Stalham	5
Hoveton	10
Catfield	12
Central Area	50
Cromer	20
Holt	15
Melton Constable	8.5
Sheringham	6
Western Area	62
Fakenham	59
Wells-next-the-Sea	3
Total	204

Source: Core Strategy, 2008

- 2.6 For the purposes of this Growth Sites Delivery Strategy, BE Group has given more weight to the employment land identified in the Draft Local Plan given it is a more recent document than the Core Strategy.

Housing and Economic Land Availability Assessment (HELAA) – Part 2: Assessment of Employment Land, North Norfolk

- 2.7 The HELAA has been prepared to determine the range and extent of land which could be considered for development to meet the need for housing and economic development in North Norfolk across the period 2016 – 2036. The Assessment of Employment Land (Part 2), provides an updated baseline figure for the amount of employment land in use and available for development across the District.
- 2.8 The Employment Land Baseline study provides a new baseline figure of all land in employment across the District including designated and allocated employment sites (including mixed use), sites with a known employment use and sites with planning permission for future employment use.
- 2.9 The assessment has identified that, across the District, there was a total of 277 ha of land currently in employment use as of April 2018 and has identified that there is potentially 168 ha of employment land available for development. If all this land was to be developed for employment purposes, there would be 445 ha of employment land available in North Norfolk over the plan period 2016 to 2036. In terms of employment floorspace, it was estimated that the 277 ha of used employment land had approximately 1,108,000 sqm of commercial floorspace. The 168 ha of available employment land could accommodate some 672,000 sqm of floorspace, suggesting an overall floorspace capacity of approximately 1,782,000 sqm.

North Norfolk Local Plan 2016 – 2036

- 2.10 North Norfolk District Council is currently in the process of producing a new Local Plan. This Plan reviews and updates the currently adopted Core Strategy and Site Allocations Development Plan document. This plan will cover a twenty year plan period commencing from 2016 through to 2036 but will be reviewed on a 5 year basis in line with current national guidance.

- 2.11 The policies within the plan are still emerging at this stage and are subject to change towards the adoption of the plan. However, the following draft emerging policies are relevant to this study. Only those aspects of each policy specific to employment land and premises are outlined.

Policy EN1 – Employment Land

- 2.12 The purpose of this policy is to ensure that a sufficient quantity of land is reserved for employment generating developments across the District.

- A total of 285.54 ha of land will be designated/allocated and retained for employment generating developments
- Of this 285.54 ha of employment land, 192.51 ha has already been developed for employment purposes. This will increase the supply of undeveloped employment land in the District to 94.03 ha and provide a reasonable supply in each area of the District
- There is approximately 42.53 ha of designated land still undeveloped within the District

Policy EN2 – Employment Areas, Enterprise Zones and Former Airbases

- 2.13 The purpose of this policy is to ensure that employment land within the District is protected for employment uses and that proposals that come forward for Employment Areas are for acceptable uses

- The diversification of the economy and the decline in traditional manufacturing means that employment opportunities now emanate from a wider range of uses. This policy therefore focuses on mix use developments
- Within North Norfolk there are two Enterprise Zones equating to 33.5ha

Policy ECN3 - Employment development outside of Employment Areas

- 2.14 The purpose of this policy is to provide opportunities for businesses situated outside of defined Employment Areas with the potential to expand and thrive and to recognise the importance of employment outside the designated Employment Areas to the wider economy by requiring such uses to be retained where possible.

- The majority of new employment development will be guided towards the sites that are designated in this plan as employment areas. However, in a rural District such as North Norfolk, smaller areas of employment land will exist across the district resulting from historic land uses. These businesses are important for rural economy and local communities
- There has been 28.5 ha of employment land at Tattersett allocated for industries or business that would be detrimental to local amenity if located in a designated employment area or in a built up area.
- In order to ensure that development in rural areas is sustainable, proposals will be expected to make best use of previously developed sites.

Annual Monitoring Report 2019

- 2.19 This annual monitoring report is the most up to date report and present key facts and figures relevant to the North Norfolk District area. This report identifies the types and quantities of development which took place between April 2018 and March 2019, comparing this to previous years and presents information on the progress of development of the emerging local plan.
- 2.20 In terms of employment land allocation, this document states there is approximately 233.04 ha of designated employment land in the district. For the period 2016-2036 there will be a total of 285.54 ha of land designated/allocated and retained for employment generating development.

3.0 SOCIO-ECONOMIC PROFILE

Introduction

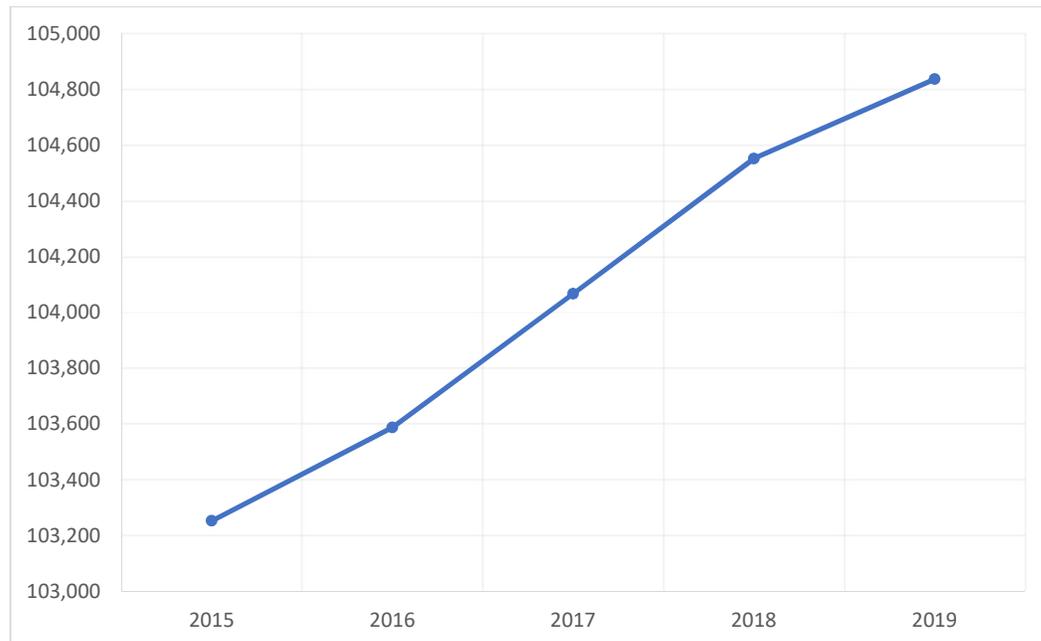
3.1 This section provides a summary profile of the socio-economic conditions in the North Norfolk District. It provides the socio-economic context which shapes employment land demand and supply factors in the study area to facilitate sustainable growth.

3.2 Data utilised includes Office of National Statistics (ONS) information on resident and working populations. For employment projections, the East of England Forecasting Model (EEFM) database prepared by Cambridge Econometrics, was used.

Demographic Assessment

3.3 The population of the District was 104,837 as of the latest data from the ONS Population Estimates 2019. This was 11.5 percent of the Norfolk total (907,760). Figure 1 below shows how the population has changed over the last five years within North Norfolk. It can be seen that there has been an increase in population throughout every year, increasing 1.5 percent since 2015.

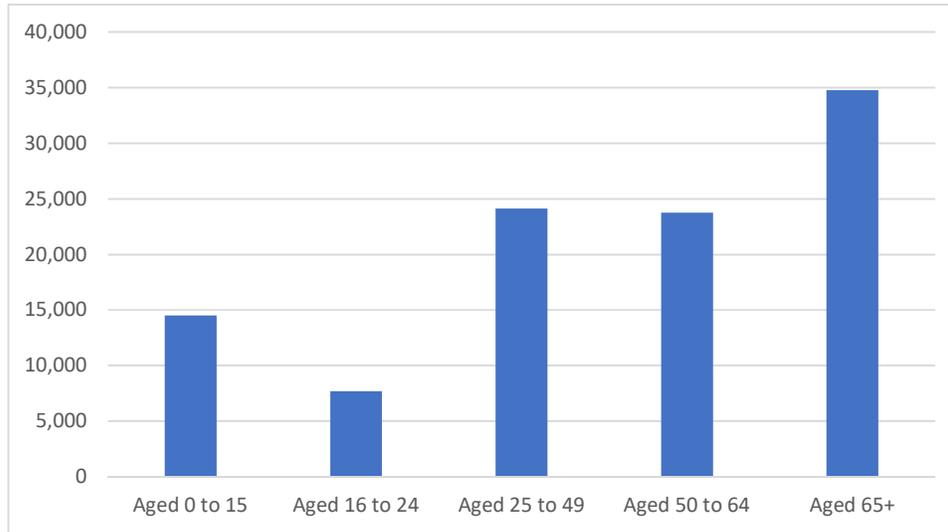
Figure 1 – Population Change, 2015-2019



Source: *Population Estimates, 2021*

3.4 The age breakdown of the population as of 2019 is provided in Figure 2 below.

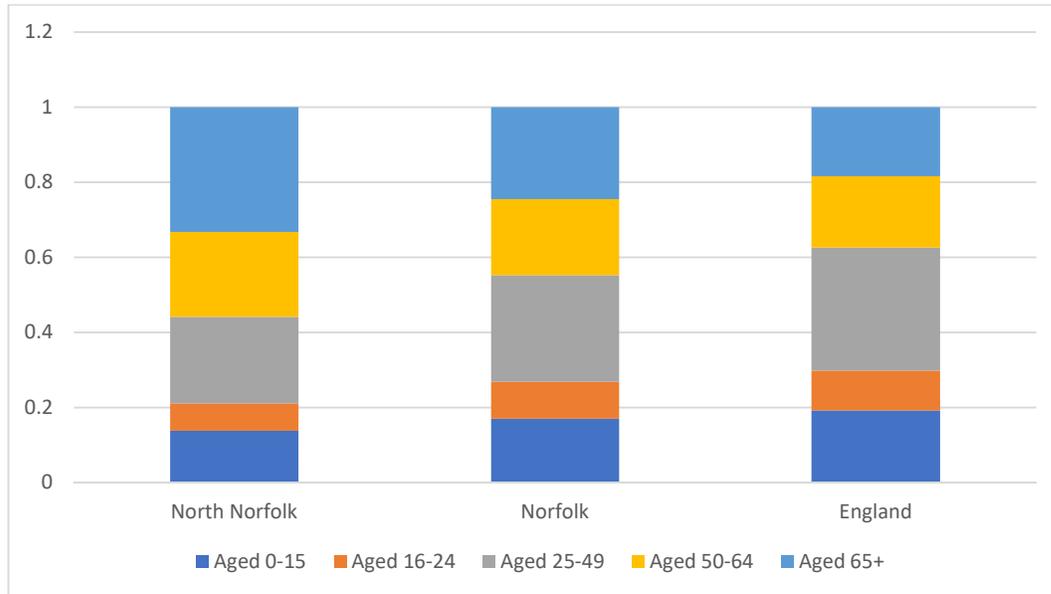
Figure 2 – Population Structure, 2019



Source: *Population Estimates/Projections, 2021*

3.5 As can be seen from Figure 2, North Norfolk’s breakdown shows a strong representation of the elderly population, comprising some 34,772 persons as at 2019, equivalent to 33.4 percent of the population. The figure below compares the proportions of the population by age group to the Norfolk and England averages. As demonstrated in the graph, the proportion of the population aged 65+ years in North Norfolk is larger than the comparator areas. Furthermore, the younger working age cohorts (16-24 years and 25-49 years) are both underrepresented in North Norfolk in comparison to Norfolk and England. This age mix has implications for employment land premises demand, as well as the provision of services, as North Norfolk has a relatively large retiree population compared to its workforce base.

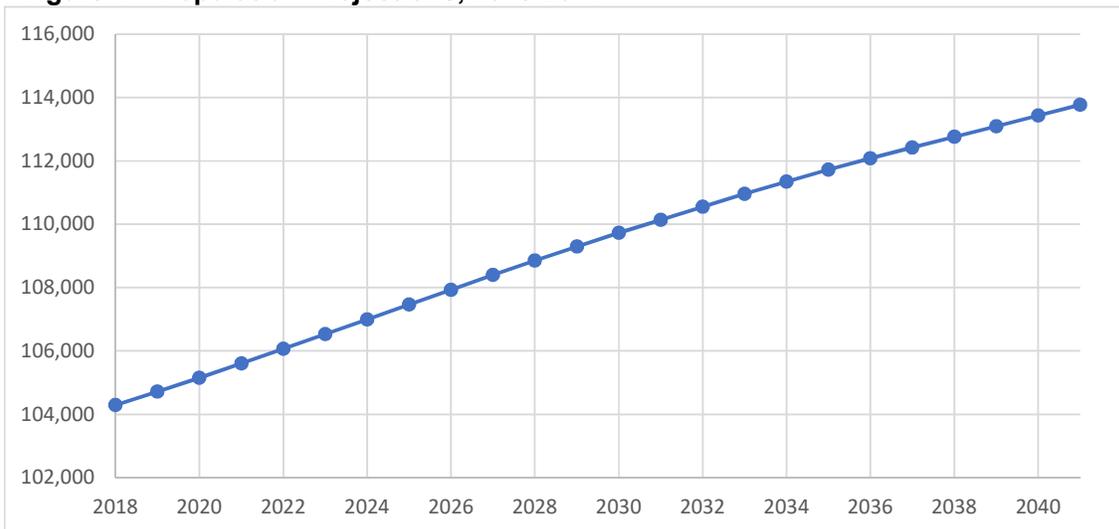
Figure 3 – Proportions of Age Cohorts



Population Estimates/Projections, 2021

3.6 Also important for this analysis is to understand the projection of future population growth in North Norfolk as they will have an impact on jobs growth and thus employment land requirements. Figure 4 shows the forecast population is estimated to steadily increase over the next 21 years, reaching a figure of 113,773 in 2041 (or 112,078 to the end of the Plan Period, 2036). This is an increase of 8 percent on the 2018 figure (7 percent to 2036).

Figure 4 – Population Projections, 2018-2041



Source: Population Estimates/Projections, 2019

3.7 Critically, the ONS projects that the 65+ age cohort will be the primary driver of population growth, increasing by almost 13,000 persons between 2018 and 2040, compared with a more modest increase in the 25-49 year cohort (+900) and declines in populations in the 0-15 years (-740), 16-24 years (-360) and 50-64 years (-590).

Employment Data

3.8 Table 3 displays unemployment data for North Norfolk and the neighbouring authorities in for the period October 2019 – September 2020. Overall, unemployment is modest in Norfolk but high in North Norfolk at 8.8 percent in the period. This is over a three percent increase compared to the unemployment rate in the period of January 2019 – December 2019 and shows the broad impact of the pandemic restrictions.

Table 3 – Unemployment and Economic Activity Rates, October 2019 – September 2020

Area	Unemployment Rate (%)	Economic Activity Rate (%)
Breckland	8.5	86.5
Broadland	4.1	85.2
Great Yarmouth	5.6	71.3
King's Lynn & West Norfolk	2.9	83.9
North Norfolk	8.8	80.4
Norwich	2.3	78.3
South Norfolk	2.0	78.5
Norfolk County	4.6	84.3
England	4.4	79.4

Source: ONS Annual Population Survey, 2021

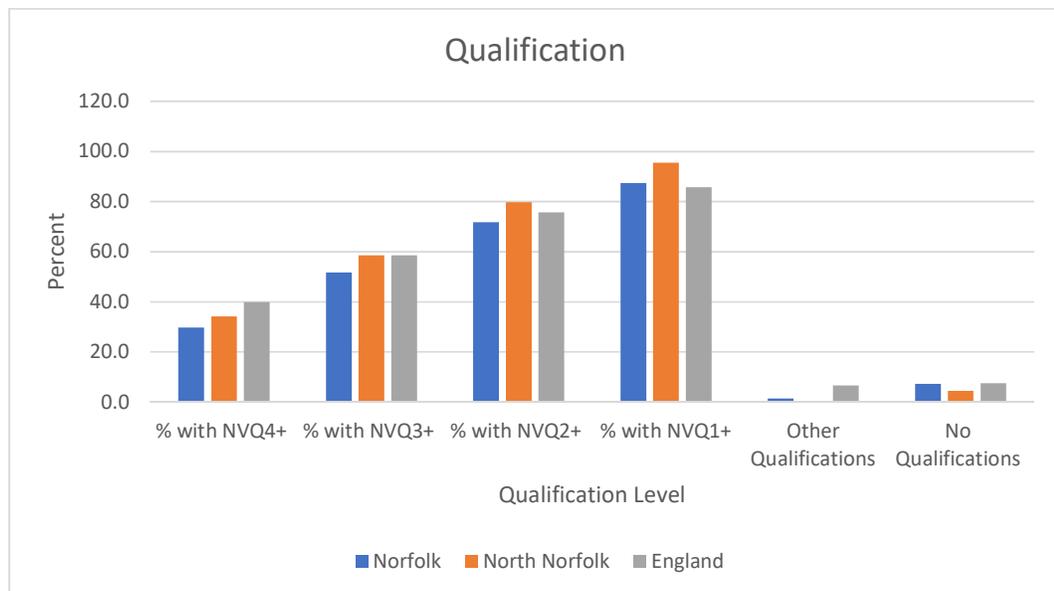
Deprivation Index

3.9 The Index of Multiple Deprivation (IMD) 2019 for England, ranks North Norfolk District 127th (in terms of rank of average score, out of 317 local authority areas, with 1 as the most deprived area). The IMDs at the Lower Super Output Area (LSOA) level, which are small areas of about 200 dwellings, help to identify pockets of deprivation in communities. A total of 62 LSOAs are in North Norfolk, with no LSOA ranked in the most deprived 10 percent in England.

Qualifications

- 3.10 Figure 5 shows that National Vocational Qualifications (NVQ) level attained by the working age population in the District, with the attainment of NVQ1+ / NVQ2+ qualifications comparing well with the regional and national levels. The averages in North Norfolk for NVQ4+ higher qualifications are slightly below the national average but are higher than the Norfolk norms.
- 3.11 The proportion of the working age population with no qualifications is lower than the national and regional averages. Compared to England averages, the proportion of the working age population with Level NVQ1+ and NVQ2+ qualifications in North Norfolk is higher than both the national and regional averages.

Figure 5 – Qualifications



Source: ONS Annual Population Survey, 2021

Employment by Industry

- 3.12 The Business Register and Employment Survey (BRES) data provides details on the number of jobs within differing industry sectors within a local authority area. The data for North Norfolk is represented in Table 4.

Table 4 – Employment by Industry, 2019

	Employment Structure			
	North Norfolk		Norfolk	England
	No.	Percent	Percent	Percent
1: Agriculture, forestry and fishing*	2,750	7.5	3.7	1.3
2: Mining, quarrying and utilities	425	1.2	1.1	1.1
3: Manufacturing	3,250	8.9	9.0	7.8
4: Construction	2,000	5.5	5.7	5.0
5: Motor trades	800	2.2	2.6	1.9
6: Wholesale	1,000	2.7	3.6	3.9
7: Retail	4,500	12.3	9.9	9.2
8: Transportation and storage	1,250	3.4	3.2	5.0
9: Accommodation and food services	5,000	13.7	8.5	7.5
10: Information and communication	425	1.2	1.9	4.4
11: Financial and insurance	275	0.8	3.3	3.5
12: Property	900	2.5	1.9	2.0
13: Professional, scientific and technical	1,750	4.8	6.0	9.2
14: Business administration and support services	1,625	4.5	6.7	8.9
15: Public administration and defence	1,125	3.1	4.8	3.9
16: Education	2,750	7.5	8.6	8.4
17: Health	4,000	11.0	14.8	12.4
18: Arts, entertainment and recreation & other services	2,250	6.2	4.6	4.6
Total	36,500	100.0	100.0	100.0

Source: Business Register and Employment Survey, 2021

*Excludes farm based agriculture

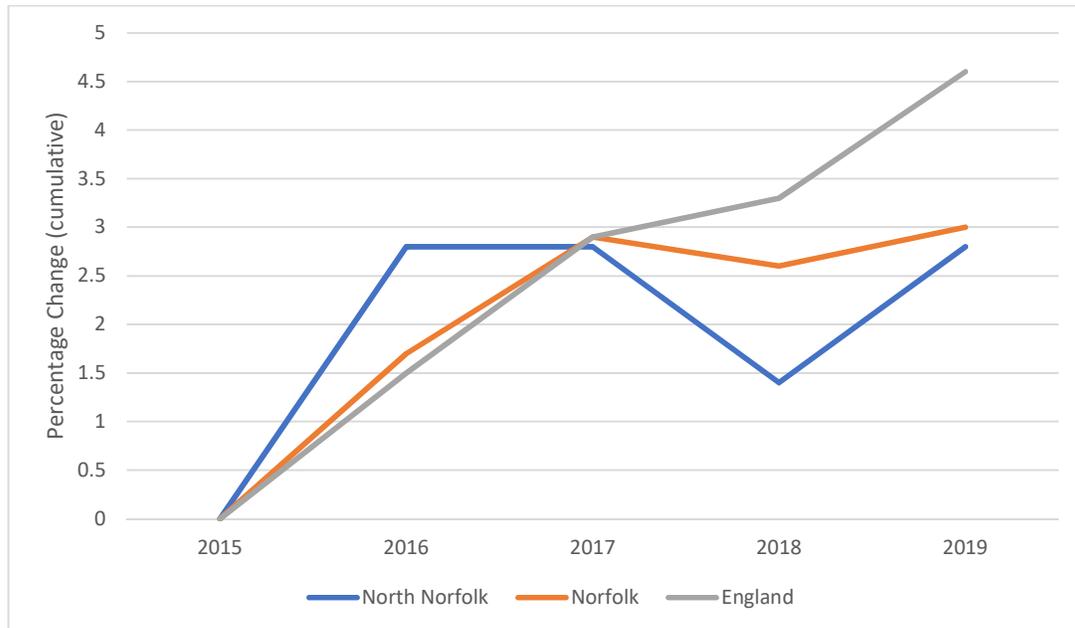
3.13 The figures in Table 4 above explain that the retail sector and the accommodation and food sector account for the largest number of employees at 12.6 percent or some 4,500 employees and 13.7 percent and some 5,000 employees, respectively. This is higher than both the regional and national averages.

3.14 The health sector employs 11.0 percent of the workforce, the third highest behind retail and accommodation and food. Although not the highest percentage for the area, the

agriculture, forestry and fishing sector employ 7.5 percent of North Norfolk employees, this is almost three percent higher than regional averages and more than six percent higher than national averages (see the Location Quotient discussion below).

- 3.15 As of 2019 within North Norfolk there were a total of 36,500 jobs split between 18 different industries. Over the last four years growth has only slightly fluctuated. 2016 experiencing a growth reaching 36,500. However, a decline occurred in 2018 of 1.4 percent. This decline saw employee numbers reduce from 36,500 to 36,000 in one year. During the same time period employee numbers from Norfolk also saw a decline however not as much as North Norfolk. BRES data that accounts for the time period including the pandemic has yet to be released.

Figure 6 – Employment Growth, 2015-2019



Source: BRES, 2021

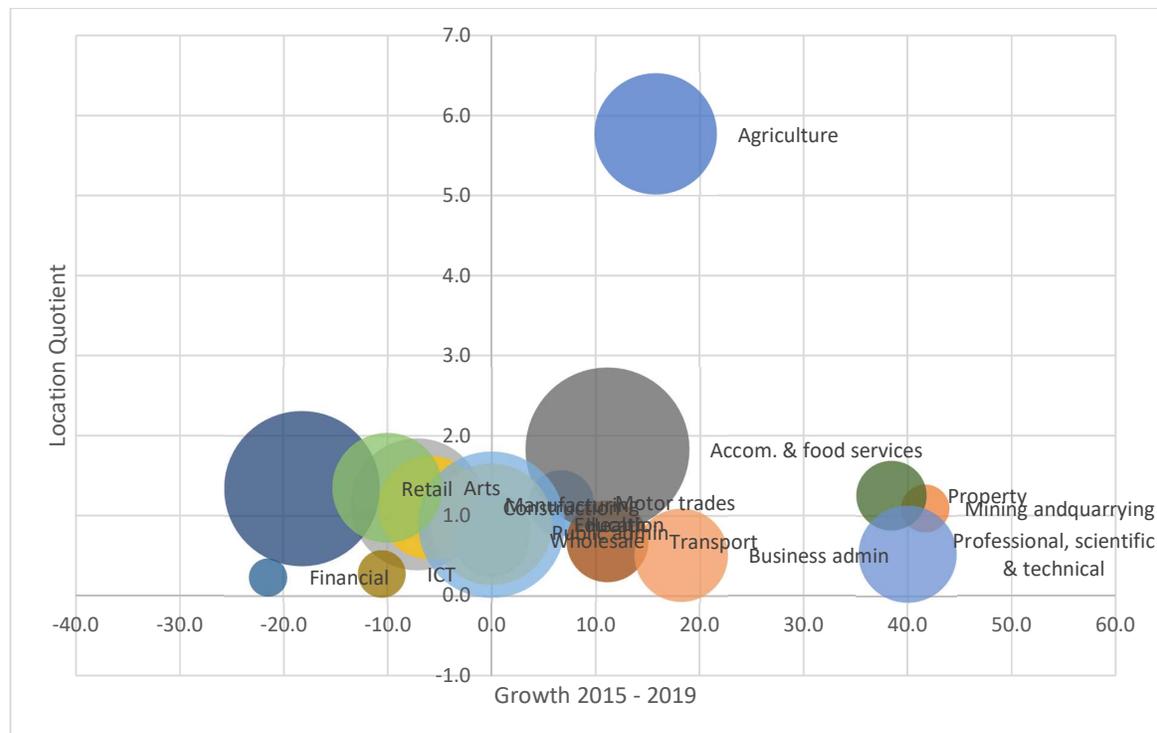
- 3.16 This reduction within North Norfolk could mainly be down to a decline in growth in six different sectors within the District. The largest percentage decline being in Financial and insurance with a 21.4 percent decline (loss of 125 jobs) between the years 2015-2019.
- 3.17 Other sectors that also experienced declines include 'Manufacturing' (of around 250 jobs), 'Arts, entertainment, recreation & other services' (around 75 less jobs) and Retail

(loss of 1,000 jobs in four years), which is the largest decline in jobs by a single sector. Some of the sectors that have experienced growth are 'Agriculture, forestry and fishing' (+375 jobs), 'Professional, scientific & technical' (+500) and 'Property' (+250).

3.18 Location Quotients (LQ) are ways to compare the relative importance of specific employment sectors on the economy, relative to the importance of that sector at the national level. An LQ of 1.0 for a sector would indicate that the proportion of employment in North Norfolk within that sector would be same as the proportion in Great Britain. An LQ of 2.0 means that the sector's proportional employment in North Norfolk is double that of the proportion in Great Britain.

3.19 The Figure below provides a graphical illustration of the size, relative importance and growth rates of the sectors in North Norfolk. The size of each bubble represents the absolute numbers of employment in each sector. The Y-axis is the LQ, therefore, the higher on this axis the more concentrated this sector is in employment, relative to the national average. The X-axis represents the recent growth rate 2015-2018.

Figure 7 – Location Quotients vs Employment vs Growth, 2015-2019

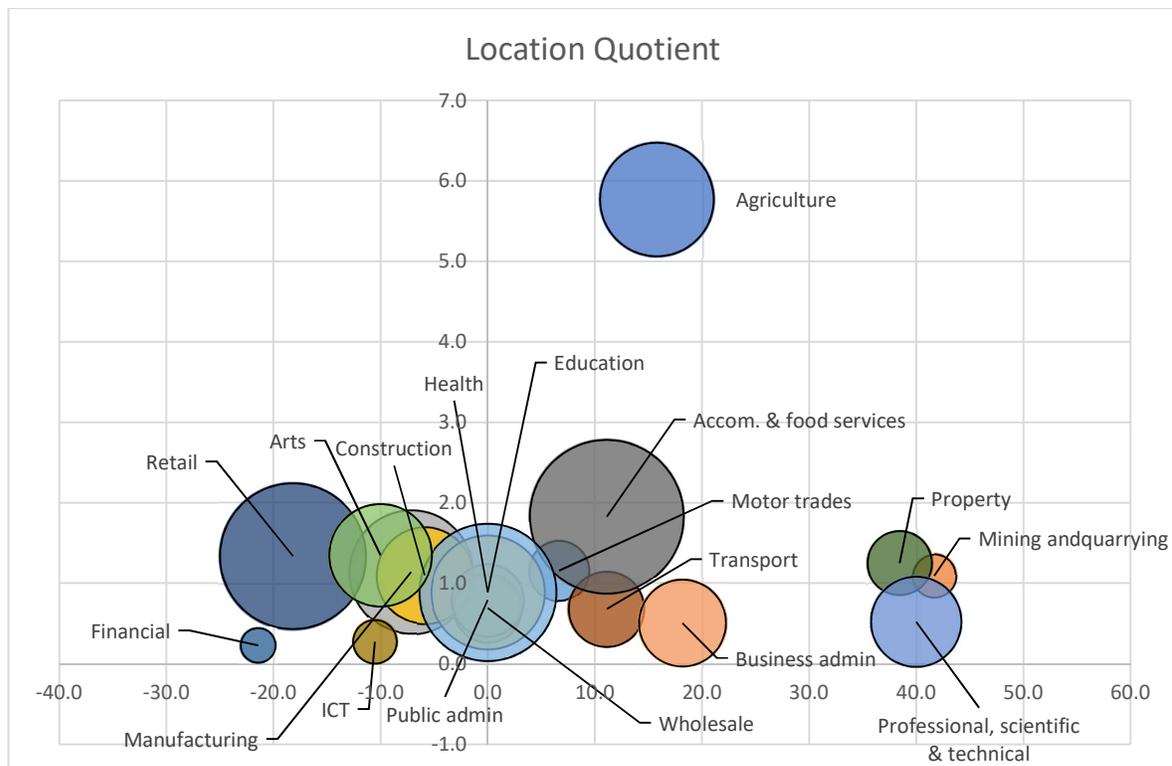


Source: BE Group, 2021

3.20 Figure 8 shows that the 'Mining and Quarrying' sector has had the largest percentage of growth in three years. The employment numbers have more than doubled, albeit from a relatively low base. This sector includes offshore mining of petroleum and gas and sand extraction.

3.21 Figure 8 shows the same data as Figure 7 above, however removes the data for 'Mining and Quarrying' and 'Professional, Scientific & Technical' in order to see the other data in more detail.

Figure 8 – Location Quotients vs Employment vs Growth, 2015-2019



Source: BE Group, 2021

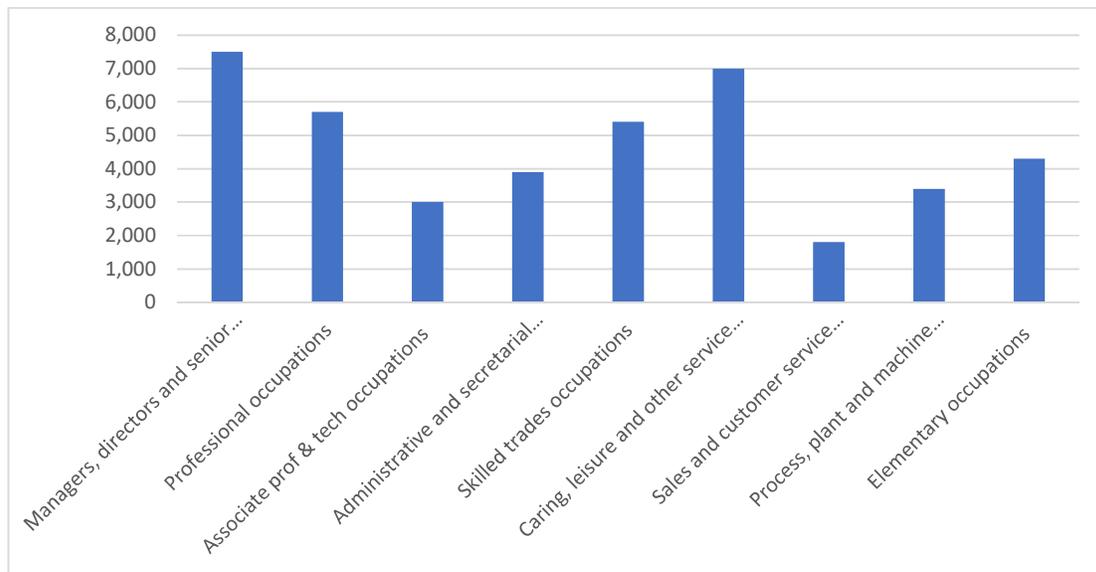
3.22 The sectors situated at the top of the diagrams (i.e. high on the vertical axis) show the sectors which have a high degree of localised specialisation, compared to GB. 'Agriculture' displays the highest degree of specialisation, being 5.8 times the average size of the Agricultural sector in GB and containing the joint fifth highest amount in employment with 2,750. Agriculture experienced 15.8 percent growth over the period, clearly showing how important that industry remains to the District. This also is likely to under-estimate the true importance of employment in this sector, as the BRES data

excludes farm-based employment (i.e. farmers living and working on their property). The second highest degree of specialisation is in 'Accommodation and Food' (being 1.8 times the average size of the 'Accommodation and Food' sector in GB) and has seen 11.1 percent growth.

3.23 'Business Administration' is low down on the vertical axis at 0.5, meaning that the sector is half the relative size of the sector in GB. However, it has also seen growth of 18.2 percent in employment since 2015.

3.24 Figure 9 below shows the split of employment by occupations of residents in North Norfolk from October 2019 – September 2020. Residents in Managers, directors and senior official occupations account for 13.4 percent of the workforce, the highest amount within North Norfolk. Residents employed within Caring, leisure and other service occupations account for 16.5 percent of the population, the second largest amount.

Figure 9 – Employment by Occupation, October 2019 – September 2020



Source: Annual Population Survey, 2021

Number and Sizes of Businesses

3.25 On a national scale, 79.0 percent of businesses in England employ less than ten people (micro businesses), whilst 97.9 percent are classified as small (up to 49 employees) as shown in Table 5. North Norfolk broadly follows the same patterns as

the national averages, however, shows a slightly lower amount of businesses employing 0-4 people, and slightly higher in each of the other size bands.

3.26 In North Norfolk, the majority of businesses comprise 0-4 employees (73.3 percent). At the other end of the scale, 10 businesses were identified as having more than 250 employees.

Table 5 – Business Sizes, 2020

Area	Number/ Percentage	Employees						
		Micro		Small		Medium		Large
		0-4	5-9	10-19	20-49	50-99	100-249	250+
North Norfolk	Number	3,100	625	300	150	40	10	10
	Percentage	73.3	14.8	7.1	3.5	0.9	0.2	0.2
Norfolk	Number	24,900	4,265	2,025	1,185	360	180	120
	Percentage	75.4	12.9	6.1	3.6	1.1	0.5	0.4
England	Number	1,883,505	260,675	130,420	70,025	23,621	13,265	9,460
	Percentage	78.8	10.9	5.5	2.9	1.0	0.6	0.4

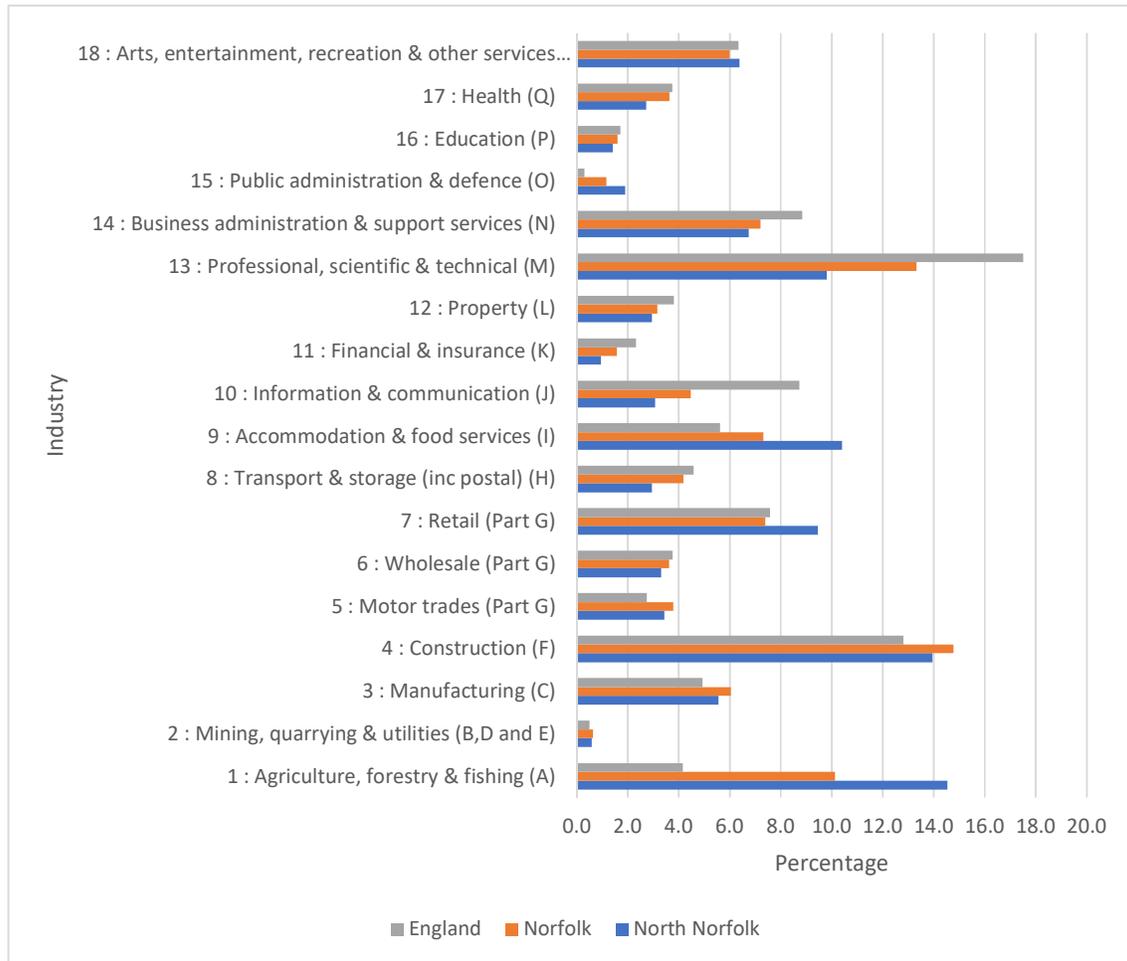
Source: ONS UK Business Counts, 2021

3.27 The total number of businesses can be broken down further by industry sector, as seen in Figure 10.

3.28 The highest proportion of businesses in the district can be found within the 'Agriculture, forestry and fishing' sector (14.5 percent). This is the most populous sector in terms of number of businesses. The number of employees in this sector, as stated above, is only 7.5 percent, highlighting that this sector is comprised of many businesses each employing, on average, a small number of workers.

3.29 'Construction' businesses account for 13.9 percent of North Norfolk's businesses, higher than national averages by 1.1 percent but lower than regional averages by 0.9 percent. This sector contains the eighth highest number of workers within the District with 5.5 percent. Public sector sectors such as 'Public administration and defence' and Education' have comparatively low proportions of business entities but are significant employers in the economy, with each entity being a larger than average employer.

Figure 10 – Business Count by Sector, Percent, 2020



Source: ONS UK Business Counts, 2021

Premises Supply

3.30 Table 6 below provides a summary of the number of commercial units in each local authority in Norfolk, based on VOA information.

Table 6 – Distribution of Premises, Number of Units

Area	Industrial	Offices
Breckland	1,710	500
Broadland	1,310	470
Great Yarmouth	1,140	460
King's Lynn and West Norfolk	1,380	560
North Norfolk	1,360	400
Norwich	1,390	1,740
South Norfolk	1,530	770
East of England	57,020	38,300
Norfolk	9,820	4,890
England	491,640	404,050

Source: VOA, 2021

- 3.31 Compared to the surrounding areas, there is a reasonable supply of industrial premises in North Norfolk at a similar level to the surrounding areas. The number of industrial/warehouse units in North Norfolk equates to 13.8 percent of the total of the County and 2.4 percent of the overall stock for the East of England. Out of all the neighbouring authorities, Breckland has the highest amount. For offices Norwich has the highest amount at 1,740 whereas North Norfolk has the lowest amount at 400, which is 8.2 percent of the collective group stock for the County.
- 3.32 Table 7 shows the supply of office and industrial premises by floorspace. North Norfolk has the lowest amount of floorspace for both unit types. As of 2019, North Norfolk contained some 543,000 sqm of industrial floorspace, 10.4 percent of Norfolk's total. For offices, North Norfolk has 37,000 sqm of office floorspace stock, 5.1 percent of the County's supply.

Table 7 – Distribution of Premises, Floorspace, sqm

Area	Industrial	Offices
Breckland	1,068,000	44,000
Broadland	648,000	91,000
Great Yarmouth	542,000	57,000
King's Lynn and West Norfolk	1,012,000	67,000
North Norfolk	543,000	37,000
Norwich	864,000	337,000
South Norfolk	559,000	95,000
East of England	33,717,000	7,118,000
Norfolk	5,236,000	727,000
England	309,771,000	85,461,000

Source: VOA, 2021

Homeworking

3.33 In North Norfolk as of the 2011 Census, 3,754 were counted as working mainly at or from home (5.3 percent). This figure comprises 17 percent of the working age population in active employment. This proportion is above both levels seen in Norfolk as a whole (3.8 percent) and England (3.5 percent). Indicating that working from home plays quite a large role in North Norfolk, influenced by its rural topography.

Earnings

3.34 Table 8 shows that in 2020, average weekly pay in North Norfolk was £534.70/ week when measured by place of work and £494.50/week when measured by place of residence. The difference between those figures indicates those commuting out of the District to work are finding significantly higher paid employment than those who work within North Norfolk.

Table 8 – Average Weekly Earnings, 2020

Area	Gross Median Weekly Pay, £ (Analysis by place of work)	Gross Median Weekly Pay, £ (Analysis by place of residence)
Norfolk	536.3	537.3
North Norfolk	534.7	494.5
England	589.9	589.9

Source: Annual Survey of Hours and Earnings, 2021

3.35 By place of work, pay in North Norfolk is lower than the averages of Norfolk and England. This is the same by place of residence.

Employment Projections

3.36 Cambridge Econometrics prepares the EEFM, which forecasts population and employment growth for the region and the constituent local authority areas. The latest version is based on 2019 data. The following table provides a summary of the forecast growth in employment by sector for North Norfolk between 2016 and 2036, the planning period for the Draft Local Plan. These figures are derived from Cambridge Econometrics' modelling of the economy, drawing upon 2011 Census information and changes in demography since. The figures for employment derived from the BRES information, summarised earlier are drawn from an annual survey of businesses, extrapolated to the economy as a whole and also excluding farm-based employment. Therefore, due to the differences in approach there are differences in the estimated employment figures.

Table 9 – Employment Forecasts by Sector, 2016-2036

Sector	2016	2036	Change 2016-36
Agriculture	2,331	923	-1,408
Mining & quarrying	105	195	90
Manufacturing	4,288	3,314	-974
Utilities	120	109	-11
Waste & remediation	63	259	196
Construction	3,422	3,960	538
Wholesale	1,812	1,988	176
Retail	5,122	6,128	1,006
Land transport	1,460	1,443	-17
Water & air transport	120	124	4
Accommodation & food services	4,881	6,861	1,980
Publishing & broadcasting	350	292	-58
Telecoms	10	36	27
Computer related activity	235	267	32
Finance	378	317	-61
Real estate	445	702	258
Professional services	1,816	2,273	457
Research & development	0	0	0
Business services	1,264	1,053	-211
Employment activities	304	307	2
Public administration	1,264	1,267	4
Education	3,638	3,579	-60
Health & care	4,950	5,759	809
Arts & entertainment	2,973	2,804	-169
Other services	1,826	1,843	17
Total	43,176	45,804	2,628

Source: East of England Forecasting Model, 2019, Cambridge Econometrics

- 3.37 The largest sectors by employment as at 2036 are projected to be accommodation and food services (6,860 jobs), retail (6,130 jobs), health and care (5,760 jobs), which were the three largest sectors in 2016, though in a different order. It is noted that the 2017 iteration of the EEFM projected 5,330 jobs for the accommodation and food services sector by 2036, with the latest version increasing this projection by a further 1,530 jobs.
- 3.38 The sector with the largest numerical growth is also forecast to be the accommodation and food services sector (+1,980 jobs) and retail growing by 1,000 jobs. This

demonstrates the expected increasing importance of the services sector to the North Norfolk economy.

3.39 However, some sectors are anticipated to decline, with the largest declines expected in agriculture (-1,410 jobs) and manufacturing (-970 jobs). For manufacturing the following table shows the particular manufacturing sub-sectors, and clearly demonstrated the importance of food manufacturing in North Norfolk. It is noted that all (non-zero) manufacturing sub-sectors are anticipated to decline in employment numbers over the forecast period. The decline in manufacturing forecast in the 2019 iteration of the EEFM is more severe than forecast in the 2017 iteration.

Table 10 – Employment Forecasts by Manufacturing Sub-Sector, 2016-2036

Sector	2016	2036	Change 2016-36
Food	1,506	1,273	-233
General	887	743	-144
Chemicals only	406	595	189
Pharmaceuticals	0	0	0
Metals	479	102	-377
Transport equipment	947	496	-451
Electronics	64	105	41
Total Manufacturing	4,288	3,314	-974

Source: East of England Forecasting Model, 2019, Cambridge Econometrics

Influence of Covid-19 Responses on Socio-Economic Characteristics

3.40 Subsequent to the collection and dissemination of some of the above statistics, the economy has received a major shock due to the Covid-19 pandemic and the emergency measures that have been imposed. The full impacts of these measures on the economy have been felt in 2020 and 2021 and are expected to be evident even beyond the relaxation of restrictions.

3.41 The services sector saw the most severe impacts in 2020, with widespread closures and the restricted operations. Accommodation, dining, entertainment, arts and non-grocery retailing were shut down for considerably longer periods than other sectors, with employees furloughed. Manufacturing was more mixed, with some sectors in

furlough or substantially reduced output, whereas others seeing increased demand (e.g. medical equipment manufacturing, some food manufacturing). Warehousing and transport saw an increase in overall demand, precipitated by the acceleration of online retailing during the pandemic restrictions, coupled with business responses to Brexit, looking to on-shore inventory.

- 3.42 Areas such as North Norfolk, which is heavily reliant of the services sector, have been particularly vulnerable to the economic shock. However, the services sector has seen strong bounce back in 2021 as restrictions have been relaxed. Domestic tourist destinations have seen strong demand in recent months as consumers choose UK locations for holidays, given the obstacles to overseas travel are ongoing. Despite this, an increase in unemployment has been observed in North Norfolk and more broadly in the economy, though off a very low base.
- 3.43 The employment growth trajectory to 2036 forecast in the EEFM is likely to be altered significantly in the short term, with lower employment. While in the longer term the trajectory is likely to return to a similar growth path, given the short-term shock, this path will be from a lower base. There is likely to be an ongoing structural change in the mix of employment that has not be factored into within the EEFM modelling, such as a movement away from retail and towards warehousing and transport.

Summary – Socio-Economic Profile

- 3.44 As of 2019, the population of North Norfolk was 104,837, a figure that has been steadily growing since 2015. This has been driven by the growth in the 65+ age cohort, growing by 2,068 in four years and accounts for 33.2 percent of the overall population in 2019. Looking forward, the population is forecast to steadily increase by 8 percent up to 2041 (7 percent to 2036). This is lower than the population growth rate for the East of England whose population is set to increase by 12.0 percent during the same period. Critically, for North Norfolk, the population growth is largely anticipated to be in the 65+ age cohort, with a projected decline in the working age population.
- 3.45 North Norfolk had a comparatively high rate of unemployment based on data from October 2019 – September 2020 when compared to other Norfolk districts. An increase in unemployment was always likely as a result of the Covid-19 pandemic causing national lockdowns and business closures.

- 3.46 North Norfolk ranks as the 127th most deprived local authority in England, which is about midway in the rankings of local authorities. NVQ levels attained by the working age population for NVQ1+ and NVQ2+ qualifications, compared well with regional and national averages. The averages in North Norfolk for NVQ3+ and NVQ4+ (higher qualifications) are slightly below national averages but above the Norfolk average.
- 3.47 North Norfolk had 36,500 jobs in 2019. North Norfolk, Norfolk and England saw a growth between 2015-2016. There was a period of decline in all three areas between 2017-2018. The highest overall losses were in the 'Retail', 'Manufacturing' and 'Art, Entertainment, Recreation and other services'. Both 'Professional, Scientific and Technical' and 'Retail' saw an increase of 500 jobs, showing the importance of these sectors in North Norfolk.
- 3.48 North Norfolk's businesses are overwhelmingly small enterprises, employing less than 10 people. This will influence the types of premises that would be in demand in the District in coming years. However, there are a small number of larger enterprises, and the assessment of premises demand should account for this small but important sector.

4.0 PROPERTY MARKET ASSESSMENT

Introduction

- 4.1 This section considers the demand for land and property within North Norfolk and broader regional influences. The local market is assessed through a quantitative review of the local supply of vacant premises, transactional data from the last decade, alongside up to date market intelligence derived from consultations with a range of stakeholders.

National and Regional Property Markets

- 4.2 The below commentary provides a snapshot of the wider commercial property market that provides context for the North Norfolk property market assessment.
- 4.3 The Eastern region contains six core markets, one of these being Norwich. A key theme impacting the commercial property sector in the region in recent times is the current supply constraint. Office markets been affected by permitted development rights (PDR) which resulted in at least 2.1 million sqft of office space being converted to residential use. As a result of the supply constraint the region as a whole has experienced rental growth.
- 4.4 Norwich is Norfolk's main hub for office space. The majority of occupier demand in Norwich has recently come from local occupiers who are leasing sub 5,000 sqft (460 sqm). Supply in Norwich has fallen in consecutive years and currently stands at just below 280,000 sqft (26,000 sqm) and due to PDR pressures, it is estimated that over 700,000 sqft (65,000 sqm) has been converted to residential or other uses. This is a pattern that can be seen across the region. As a result of this, occupiers have a lack of choice. PDR in the city centre has also resulted in people moving out of town to find office space as it is often the only option for occupiers with larger requirements.
- 4.5 Rental Levels have also increased in the area, influenced by the falling supply and at 2019/20 were achieving £16.50 per sqft (£178 per sqm) and there is potential for headline rents to grow. Such rents achievable will not support new development, though refurbishments are viable and would be an attractive option to occupiers on the market. Savills estimated that prime rents in Norwich could increase close to £20.00 per sqft by 2020 (pre Covid-19 economic shock).

- 4.6 Within Norfolk, Norwich has the largest travel to work zone compared to other key Norfolk towns. There are currently 450,000 people living within a 40 minute commute of Norwich, covering 50.2 percent of the entire Norfolk population. North Norfolk is a more contained market, though has a net out-commute to Norwich and there are some north coastal communities where the majority of people work outside the county. This is predominantly due to links with King's Lynn and the high proportion of second homes being located in this area. People are attracted to the lifestyle and amenity of the area. South Norfolk has a strong pull to other employment markets including Cambridge and London.
- 4.7 Norwich is the main node for office space, the demand has risen to its highest level in three years with over 200,000 sqft of requirements, which has resulted in a decline in supply as discussed above. In 2019 there were 73,200 sqft of lettings. Research has found that limited development provides an opportunity to capitalise on rental growth. High quality refurbishments have been a viable option with buildings such as Norfolk Tower seeing rents rise from £10 per sqft to £15 per sqft post refurbishment.
- 4.8 In terms of Norfolk's industrial and warehouse market it was negatively affected by the recession, however, has now fully recovered and capital values have improved. This was followed by improvements in rental values with an upward trend being evident on most estates where there are regular lettings. These improved rental values were a combination of improved demand and reduced supply. With the market being more buoyant and there is a sustained trend of improving values there is now a better prospect than at any time in the last ten years for developers to see viable investment in new industrial and warehouse units.
- 4.9 North Norfolk's industrial market is influenced by its geography – with its rural location helping with the food and beverage sectors in terms of agricultural machine production and maintenance opportunities for value-adding in the food sector, such as food packaging and processing (e.g. potato processing).

Property Transactions

4.10 Transaction information has been sourced from Radius Data Exchange property database, for industrial/warehouse units and offices, sold or let in North Norfolk in the last 10 years.

Industrial/ Warehouse

4.11 85 industrial deals have been completed within North Norfolk since 2010, of which 80 have data available. A total of 63,725 sqm of floorspace has been transacted. A breakdown of these deals by year and size band can be seen in Table 11 below.

Table 11 – Industrial Transactions, 2010 - 2020

Industrial Transactions		0-100	101-200	201-500	501-1,000	1,001 - 5,000	5,001 - 10,000	10,001+	Unknown	Total
2020	Total Floorspace (sqm)			594	990					1584
	No. of Properties			2	1				1	4
2019	Total Floorspace (sqm)	73	992	238	694	2226				4223
	No. of Properties	1	6	1	1	1				10
2018	Total Floorspace (sqm)	93	187							280
	No. of Properties	1	1						1	3
2017	Total Floorspace (sqm)	40				2282	12,128			14450
	No. of Properties	1				2	2		1	6
2016	Total Floorspace (sqm)	345	232	279	550		4508			5914
	No. of Properties	4	2	1	1		1		1	10
2015	Total Floorspace (sqm)	99	160	1,664	541	3,799				6263
	No. of Properties	1	1	6	1	1				10
2014	Total Floorspace (sqm)		527	279		10,345				11151
	No. of Properties		4	1		4				9
2013	Total Floorspace (sqm)	77	450	2,738	1,915	12,312				17492
	No. of Properties	1	3	8	2	5				19
2012	Total Floorspace (sqm)	139	233	464						836
	No. of Properties	2	2	1						5
2011	Total Floorspace (sqm)			1,068						1068
	No. of Properties			3					1	4
2010	Total Floorspace (sqm)			464						464
	No. of Properties			1						1
Total	Total Floorspace (sqm)	866	2781	7,788	4,690	30,964	16,636	0	0	63,725
	No. of Properties	11	19	24	6	13	3	0	5	81

Source: Radius Data Exchange, 2021

4.12 Industrial properties of 201-500 sqm saw the highest number of deals, accounting for 29.6 percent of the decade total. Most market activity occurred in the 0-500 sqm size ranges, however, there were also a number of transactions for units between 1,000-5,000 sqm between the years 2013-2017.

4.13 2013 saw the highest number of deals occur within in a single year, 19, 23.5 percent of the decade total. 2013 also saw the largest amount of floorspace transacted during a single year at 17,492 sqm. The largest amount of floorspace transacted during a single deal was 6,064 sqm. There were two deals of this size in the same year, both

for warehouses in Hempstead Industrial Estate, Holt. The longest lease saw 321 sqm at Unit 4, Norwich Road, Cromer let on a 20 year lease to Miramar Veterinary Centre Limited in 2013.

- 4.14 Additionally, four investment deals were recorded during the decade, of which the largest amount of floorspace saw 10,218 sqm of a unit on Parker Drive in Fakenham sold in an investment deal in 2017 for very low £35,000. Investment deals are not recorded in the above table of transactions as they do not indicate occupier take-up.

Office

- 4.15 Since the start of 2010, 26 office deals have been completed within North Norfolk, combining 14,835 sqm of transacted floorspace. Table 12 shows a breakdown by year and size band.

Table 12 – Office Transaction, 2010-2020

Office Transactions		0-100	101-200	201-500	501-1,000	1,001 - 5,000	5,001 - 10,000	10,001+	Unknown	Total
2020	Total Floorspace (sqm)	54								54
	No. of Properties	2								2
2019	Total Floorspace (sqm)	66	120	233						419
	No. of Properties	1	1	1						3
2018	Total Floorspace (sqm)	89		227						316
	No. of Properties	1		1						2
2017	Total Floorspace (sqm)									0
	No. of Properties								1	1
2016	Total Floorspace (sqm)	160								160
	No. of Properties	1							2	3
2015	Total Floorspace (sqm)	99	113	291						503
	No. of Properties	1	1	1					1	4
2014	Total Floorspace (sqm)	268		434	625			11,087		12414
	No. of Properties	4		1	1			1		7
2013	Total Floorspace (sqm)	61								61
	No. of Properties	1								1
2012	Total Floorspace (sqm)	39								39
	No. of Properties	1								1
2011	Total Floorspace (sqm)	100			769					869
	No. of Properties	1			1					2
2010	Total Floorspace (sqm)									0
	No. of Properties									0
Total	Total Floorspace (sqm)	936	233	1185	1394	0	0	11087	0	14835
	No. of Properties	13	2	4	2	0	0	1	4	26

Source: Radius Data Exchange, 2021

- 4.16 Unsurprisingly smaller offices were the most popular, with 13 office deals, half of all transactions, completed for offices between 0-100sqm. Transactions of less than 500 sqm accounted for 73.1 percent of all deals completed.
- 4.17 Very large office transactions, for more than 10,000 sqm in one deal, are rare with only one recorded over the decade. This was the largest deal to occur across the decade and it occurred in 2014 with an 11,087 sqm building on Clipbush Lane in Fakenham.

Excluding this transaction, the average annual amount of office floorspace transacted in North Norfolk over the last decade was 341 sqm per annum.

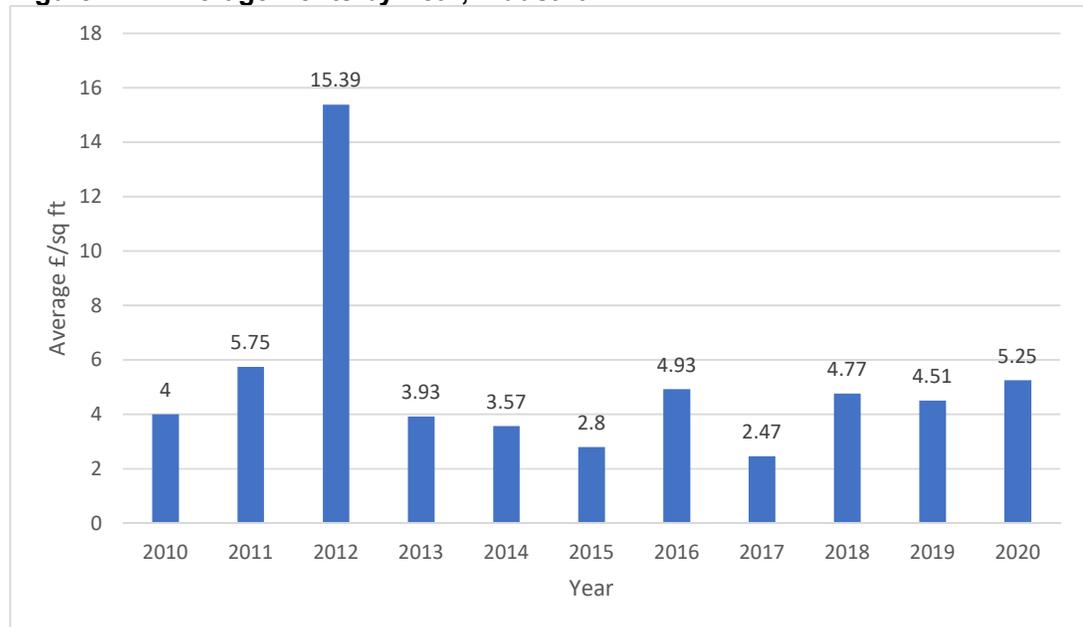
- 4.18 2014 saw the highest number of deals completed during a single year with seven. This was also the year that saw the highest amount of floorspace transacted at 12,414 sqm equalling 83.7 percent of the decade total.
- 4.19 Additionally, 10 investment deals were completed during the decade. 533 sqm at St Nicholas Court, North Walsham was the largest investment transaction of the decade.

Rents

Industrial

- 4.20 Figure 11 below shows the average rents being achieved for industrial units over the last decade, broken down by year. Of the 57 industrial rented properties, pricing information was available for 33 (57.9 percent).

Figure 11 – Average Rents by Year, Industrial



Source: Radius Data Exchange, 2021

- 4.21 Average rents have fluctuated slightly between the years 2010 and 2020. Even though there has been this fluctuation, rents were similar in 2020 to rents in 2010 at around £4/sqft. The anomalous year in 2012 saw one particularly high rent achieved in North

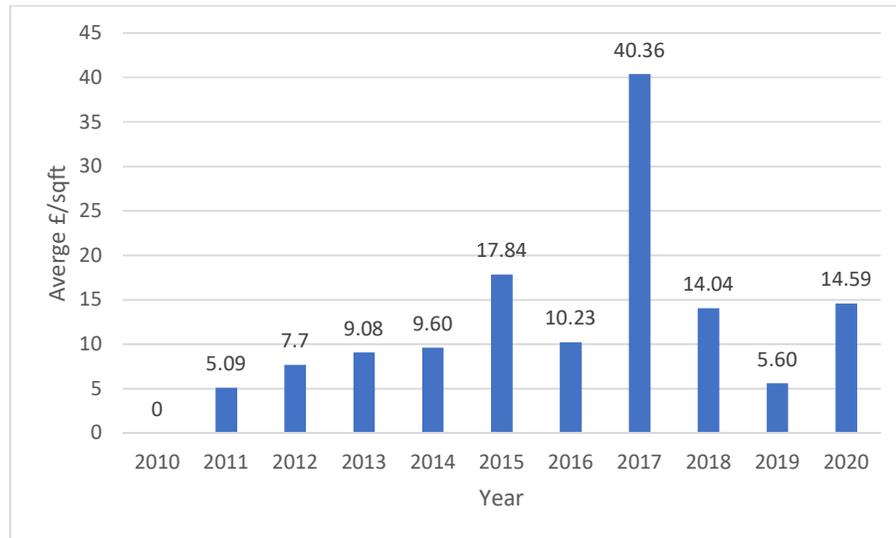
Walsham, though this should be seen as an outlier. Otherwise there has been no real discernible price growth in the industrial sector over the decade.

- 4.22 Freehold transaction data is also available for the period 2010-2020. The average freehold sale level for the last three years was £68/sqft. This comes from the six transactions providing a sales price.

Office

- 4.23 The average rents achieved for office units over the last decade have been broken down by year in Figure 12. 25 office rentals were completed, with rental figures available for 16.

Figure 12 – Average Rents by Year, Office



Source: Radius Data Exchange, 2021

- 4.24 Office rents have been increasing at a steady pace since 2010, apart from a slight dip in 2019 to £5.60/sqft. However, the low transaction volumes mean that a discernible trend is difficult to quantify.

Property Supply

- 4.25 A schedule of the vacant floorspace being marketed in the study area (as of February 2021) has been compiled into a physical survey, a trawl of commercial property agents' websites and consultations with agents. The marketed space is taken to be a reasonably close approximation to that which is vacant – although there may be

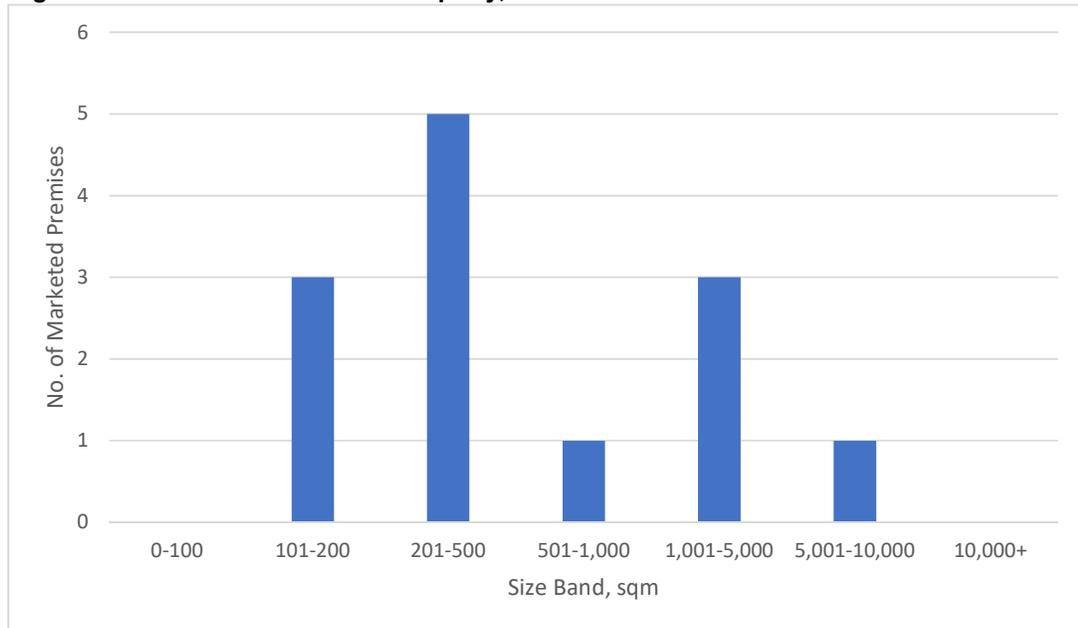
occupiers waiting for interest in their property before moving, and empty units not actually being marketed.

- 4.26 Across the District, a total of 17,603 sqm of vacant space is reported, comprising of 33 individual premises and business parks/industrial estates/enterprise parks. 4,815 sqm from 10 premises is industrial and 1,180 sqm in 21 premises is offices. Vacancy schedules can be found in Appendix 1.

Industrial

- 4.27 The 10 industrial premises are currently being marketed as available with North Norfolk, comprising 4,815 sqm (51,829 sqft). The largest available unit is unit 2, Cornish Way Business Park at 2,806 sqm (30,203 sq ft). There are also four units currently listed at Hornbeam Business Park, three to let and one for sale, varying in size between 203 – 290 sqm (2,184 – 3,121 sq ft).
- 4.28 Nine of the properties are being advertised as available for leasehold (90 percent), with only one property available to buy.
- 4.29 There are also three business parks/industrial estates/enterprise parks currently being marketed offering a total of 11,609 sqm (124,957 sq ft). These include Scottow Enterprise Park, Hempstead Road Business Centre and Melton Constable Industrial Estate. Both Hempstead Road Business Centre and Melton Constable Industrial Estate have asking rents available of £3.02/sq ft and £1.74/sq ft respectively. Hempstead Road Business Park is majority industrial, however, does have offices available on site as well. The same applies for Scottow Enterprise Park.
- 4.30 Including the three business parks/industrial estates/enterprise parks the total floorspace being marketed is 16,423 sqm (176,777 sq ft).
- 4.31 Figure 13 below shows the various sizes of the marketed industrial units, including the business parks/industrial estates/enterprise parks. Five of the units are between 201-500 sqm in size, 38.5 percent. Four of the five are industrial units at Hornbeam Business Park. The only premises being marketed over 5,000 sqm is Scottow Enterprise Park, which is 5,207 sqm (56,048 sq ft).

Figure 13 – Amount of Marketed Property, Industrial

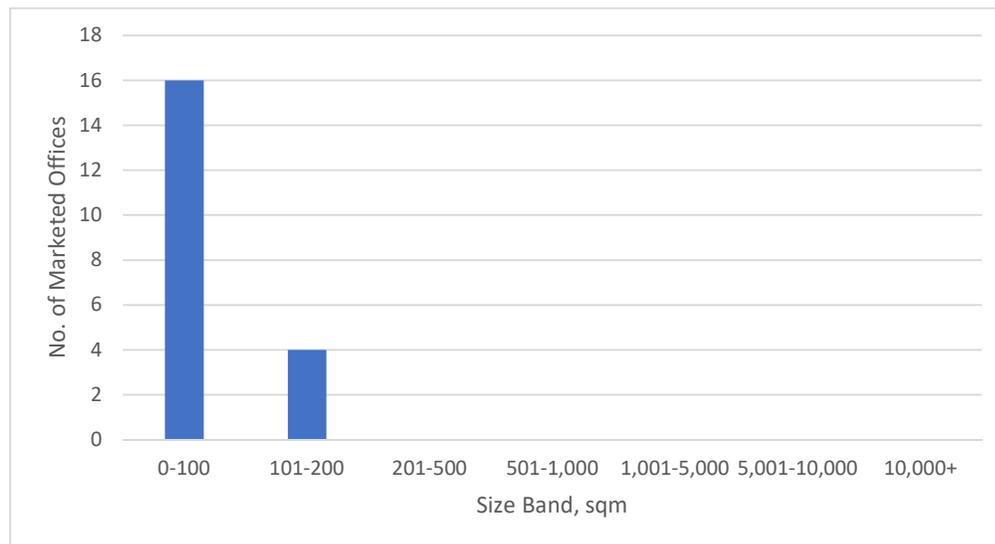


Source: Radius Data Exchange, Various Agent Websites, 2021

Office

4.32 There are 21 office premises being marketed within North Norfolk, totalling 1,180 sqm. 20 of the 21 units provide information with regards to size. As Figure 14 shows, there are no office unit in North Norfolk available of more than 200 sqm which could meet larger property requirements.

Figure 14 – Amount of Marketed Property, Office



Source: Radius Data Exchange, Various Agent Websites, 2021

- 4.33 All 21 office units are available to be leased, with no units for sale. All of the marketed properties are 200 sqm or smaller with the vast majority smaller than 100 sqm.

Valuation Office Data

- 4.34 The Valuation Office Agency (VOA) provides data on the overall number of business premises (hereditaments) and overall floorspace by broad use type, including offices and industrial/warehousing. According to the latest VOA statistics (2018-2019), there were 400 office hereditaments and 1,360 industrial hereditaments within North Norfolk at that time, totalling 529,000 sqm and 9,209,000 sqm respectively.
- 4.35 Comparing these VOA figures to the vacancy schedules above can provide an indication of the overall occupancy rate of the commercial premises. The occupancy rates calculated are estimates only due to different timeframes of the two sets of data (VOA data and the vacancy schedules) and that some floorspace may be being sold off-plan (i.e. yet to be constructed). However, they do provide a reasonable indication of the overall performance of the market.
- 4.36 Occupancy rates of 90-95 percent can be considered a reasonable balance between a vibrant, active market, providing good returns to landlords and providing capacity for churn and growth in the market. A high occupancy rate is an indicator of a full market with businesses having difficulties in finding adequate premises. A low occupancy market indicated long-term unoccupied and derelict stock and poor business growth.
- 4.37 As of 2021, there were some 1,180 sqm of office space and 16,618 sqm of industrial space (including mainly industrial business parks/ industrial estates/ enterprise parks) on the market, which equates to occupancy rates above 99 percent for both markets. Even allowing for further available units that may not be widely being marketed, this suggests a constrained market in North Norfolk.

Summary

- 4.38 Key findings emerging from the analysis of the property market data are that:
- The transactions of commercial property are generally for smaller units, though some mid to larger industrial units (above 1,000 sqm) have been transacted

over the past decade. This is consistent with the dominance of SMEs in North Norfolk as detailed in the socio-economic chapter.

- Industrial premises have had a higher volume of transactions over the last decade than office premises in North Norfolk.
- There is very limited choice for currently available properties in North Norfolk, suggesting that businesses may struggle to acquire appropriate premises in their choice of location.
- Rent values, particularly for industrial premises are modest and not suggestive of an attractive development market in North Norfolk.

5.0 STAKEHOLDER CONSULTATIONS

- 5.1 The research for this Growth Sites Delivery Strategy has included consultations with a selection of stakeholders in the market, including public sector entities, key businesses, landholders and commercial property agents. The initial consultations were predominantly undertaken in early 2020 by face-to-face and telephone interviews, though some updated consultations occurred later in 2020 and in 2021. The findings of these consultations have been combined and presented below by key themes. Importantly, some of the consultations were largely undertaken before the impacts of the Covid-19 response were felt and understood by businesses and individuals. Therefore, other issues and opportunities were discussed.
- 5.2 The responses have been combined to provide anonymity to individual respondents, except when attributable to a particular site or property requirement. The list of consultees interviewed is provided in Appendix 2.

Overall Market Confidence

- There is significant confidence in the local market, with positivity about the benefits of operating a business in the locality.
- There is business loyalty to the region, with stability in local markets and long-term business enterprises.
- Businesses understand that North Norfolk's rural location comes with operational obstacles but are prepared to work within these constraints and are happy to continue to operate within this framework.
- The local area is a good location to operate a food and beverage business as the surrounding rural economy provides primary inputs and there is a skilled local workforce.

Key Development Issues

- Costs of development is a key issue limiting commercial property development in North Norfolk, the values of the end scheme do not support development of new premises. This viewpoint was observed by developers/landholders as well as businesses.
- Some respondents suggested that there was insufficient demand for further employment land, though this was not a universal position.

Business Issues

- Attracting skilled staff was a major difficulty throughout North Norfolk, impacting on business growth and operations.
- Low to moderate wage occupations can be difficult to attract staff, due to housing affordability issues in North Norfolk. Workers in these occupations may have to travel significant distances from areas with more affordable housing, which makes the jobs less attractive.
- There is a lack of training facilities within North Norfolk across a broad range of skill sets, including vocational, technical and professional occupations. Some respondents considered that there was sufficient demand for an additional training college to service the area, with an emphasis on engineering skills.
- The distance from key markets is a disadvantage of operating a business in North Norfolk.
- Further collaboration between businesses would be a benefit to the North Norfolk economy, but businesses do not seem to talk to each other.

Property Requirements

- Coda Plastics – existing plastics manufacturing business in North Walsham, looking to consolidate their operations into one location. Have been looking to acquire premises as they become available, but limited choices and have not found one unit that all operations could be housed within. Looking for about 8,000 sqm.
- Jack Richards and Sons – haulage business in Fakenham, looking to expand operations by providing storage for clients. Requirement is for about +5,000 sqm and looking in Fakenham.
- Crisp Malt – looking to expand premises within their site and adjacent site under their control. Outline planning application for storage and production units and a detailed application for entry road and storage unit. Scheme will be partly funded by a housing scheme (outline application).
- Ladbrook – looking to update their premises in North Walsham. Location is adequate but the manufacturing and office buildings are old and not fit for purpose. Would consider redevelopment on site or elsewhere in North Walsham, such as the western extension area. Otherwise Catfield, Stalham or Aylsham would be adequate.
- Marett's Chariots – coach hire business looking for about 0.5 ha of land. Shape of land is important for coach movements and parking.

Property Commentary

- Rural employment units can achieve quite good rents, with firms attracted to the amenity provided by such units.
- Lack of supply of good quality units (both industrial and office) is the main limiting factor in the commercial property market. Some respondents have known businesses to be looking for appropriate spaces for a long time.
- The e-commerce market is changing the requirements for warehouse space. As the timing and movement of goods is different to a typical retail supply chain, the locations of warehouses can be different, including in areas (e.g. Norfolk) not typically associated with logistics.

Development Opportunities

- There are opportunities for business development in rural areas, including small industrial units, links between agriculture, tourism and retail and small office units, taking advantage of rural amenity.
- Further offices units are required, with limited good quality options in the market. Specific areas mentioned were North Walsham, Cromer and eastern areas
- Further industrial units are required, with limited options of a range of sizes. Specific areas mentioned were North Walsham, Fakenham and Holt.

Funding

- Local Enterprise Partnership (LEP) funding is available for businesses in Norfolk, including Small Grant Scheme (up to £3,000) and Growing Business Scheme (up to £50,000).
- Growing Places Fund is a loan scheme to help development schemes overcome funding gaps, to be paid back once scheme is operational.

Location specific – North Walsham

- Western extension area has potential positives for the town, including potential for more employment spaces. However, careful planning is required to ensure sufficient services for growing population. The traffic issues currently in North Walsham (i.e. rail bridges) would be resolved with this scheme.
- Town centre car parking options and costs limit the attractiveness of the North Walsham town centre.

Location specific – Egmere Enterprise Zone

- Landholder considers that there are potential further opportunities for this site, for operations connected to the rural economy, though costs of development are limiting its options.

Location specific – Fakenham

- Limited choices of premises for businesses looking to locate to Fakenham, particularly for good quality premises.
- Vehicular access through and within the town, particularly around the town centre can be difficult, reducing perceptions of accessibility and convenience for prospective businesses.

North Norfolk District Council

- Council departments are supportive of business and keen to help. Some businesses reported that there is a difference between Council's willingness to help and their ability to provide help.
- Business rates are a major cost for businesses and limit their ability to spend on other things (e.g. staff wages, expansion)

Summary – Stakeholder Consultations

- 5.3 There is confidence in local businesses in North Norfolk with people wanting to support local businesses even with the constraints that come with being in a rural location. North Norfolk council is also very supportive of local business and is keen to help in anyway they can.
- 5.4 There were a few issues raised during consultations. One of the main issues restricting commercial development is the cost that comes with developing. Lack of skills being a further issue throughout North Norfolk impacting on business growth. Due to low wages and lack of training opportunities North Norfolk struggles to attract staff.
- 5.5 Through stakeholder consultations it has been made clear that there are a number of property requirements in the area. Businesses are looking for a mixture of opportunities to expand their current premises and also relocate to larger sites, including some significant size requirements.
- 5.6 In terms of available property in the area at present time, it is clear rural employment units can achieve good rents. There is, however, a clear lack of good quality commercial units, especially office units with limited good quality options in the area.

The specific areas mentioned were North Walsham, Cromer and eastern areas. Further industrial units are required with limited options of a range of sizes, namely in North Walsham, Fakenham and Holt.

- 5.7 Funding is available for businesses in Norfolk through the Local Enterprise Partnership (LEP) including small schemes, of up to £3,000 and growing business schemes of up to £50,000. There is also a growing places fund scheme to help development schemes overcome funding gaps.

6.0 EMPLOYMENT SITES

- 6.1 The following table provides an overview of the employment sites and areas in the First Draft Local Plan (Part 1) and associated mapping (June 2019). This includes employment land, employment allocations, enterprise zones, proposals for other area and mixed use areas that have an employment component. The table reviews the development potential of each of the sites and provides descriptions of any existing uses and the remaining vacant land parcels. This analysis has been informed by site inspections of the employment allocations, reviews of planning applications/permissions where applicable and input from Council officers.
- 6.2 Estimates of the realistic land supply available are drawn from the monitoring data, and data available on the sites. The realistic land supply is an estimate of the likely remaining developable land, removing land that has also been taken up for development but also land that from our analysis is unlikely to be developable for B-class employment uses.
- 6.3 Appendix 3 is the collection of proformas for the sites with land available, providing further details for the sites. This includes some employment areas with multiple sites available.

Table 13 – Employment Sites in North Norfolk

Site Ref. Number	Name	Location	Site Description	Site Size, ha – Baseline	Site Size, ha – Realistically Available	Constraints	Development Potential
Employment Land							
EMP02	Norwich Rd	Cromer	Small node comprising SMEs including auto servicing, mobility shop, home décor. Units are of moderate quality though overall layout of this node is disjointed. NCC has land to the south (outside of current allocation) that could incorporate an expansion of this site if required.	0.62	0	Awkward access onto Norwich Rd. Neighbouring residential dwellings	Allocation is fully developed, though non-allocated land in NCC ownership could be for employment uses, similar to existing.
EMP03/1	East side of Holt Rd	Cromer	Mix of uses along Holt Rd, including typical B-class uses as well as non-B-class uses, that typically have a main road location. Includes public sector occupiers (NNDC and police), manufacturer, depot and retailing. No vacant land is available, though with consolidation of car-parking there may be potential for more intensive use of the site.	5.78	0		Any development would be an intensification of uses, though unlikely in the foreseeable future.
EMP03/2	West side of Holt Rd	Cromer	This employment site is split into two separate locations - the southern area (4.5 ha) is a more traditional industrial estate of B2 and B8 units. Some of the units appear dated and in need of refurbishment. The large site at the end of Stonehill Way (1.72 ha) formerly had an industrial unit, though this is now demolished, with hardstand area remaining. Some unused areas are also located within the Jewson land (0.36 ha, sloped and treed) and rear of Howdens land (0.36 ha, treed), though unlikely to come forward for development. Northern area (4.2 ha) comprises trade services, Co-op foodstore, ambulance, Travis Perkins, and smaller workshop units.	8.7	1.72	AONB	Industrial units as a reuse of the Stonehill Way site. Likely to be a short-term opportunity. Development of a single larger unit or a series of smaller units could be supported.
EMP04	Area around Cromer Rail Station	Cromer	Predominantly a retail node, comprising supermarket and comparison stores. Other uses are Cromer Station and a disused nightclub. The nightclub has some potential for B1 uses, though would require investment and it is questionable whether such a scheme would be viable. Other alternative uses may be preferred that take advantage of its proximity to the station.	3.13	0	Rail line and terminal	No vacant land available. Redevelopment of nightclub provides opportunity for regeneration, though has been mooted for redevelopment for a long time. Potential for good quality offices, including serviced office and incubator units.
EMP05	Fakenham Industrial Estate	Fakenham	Large industrial node housing a wide range of businesses from SMEs to mid and larger occupiers. Includes some high profile NN businesses that have a national or international market. Some enterprises have multiple premises due to limited options on the	29.05	3.12		Vacant land parcels appropriate for a mix of B2 or B8 uses, with limited obvious constraints to development, though sites do not have significant prominence and thus may be less attractive to market. Lidl

Site Ref. Number	Name	Location	Site Description	Site Size, ha – Baseline	Site Size, ha – Realistically Available	Constraints	Development Potential
			site. Occupancy rates are high. Majority of the designation is accessed via George Edwards Rd, which is approximately 800m from the A148. However, the south-western part of the designation is accessed from Norwich Rd or The Drift to the south or west, which is less convenient to the wider highways network. Vacant land is centrally located within the industrial estate and is under the control of current occupiers (Lidl, Hain Frozen Foods) or the developer (Gorgate Ltd). These sites would be appropriate for further B2 or B8 units.				and Hain Frozen Foods sites to be retained by owners for foreseeable future. Gorgate Ltd site not currently being marketed.
EMP06	Enterprise Way	Fakenham	This employment designation is in two distinct and separated areas - southern area (3.91 ha) centred on Enterprise Way being a mix of trade uses, car sales and showrooms and the northern half (6.01 ha) comprising Morrisons, medical centre, trade uses, pub/restaurant and clean industrial units. Some construction is underway in the northern section, being the remaining areas in this node. There is no vacant land. The two halves have different entry-points and have no integrated function.	9.92	0		Development of this area has been recently completed.
EMP07/1	Holt Rd - west	Fakenham	Single occupier site housing Elis (formerly Berendsen Workwear) a contract launderer. Buildings are of a good quality. Neighbouring uses are housing.	0.96	0	Neighbouring residential uses	Potential medium to longer term risk of being lost to other uses (e.g. housing), if current occupier vacates site.
EMP07/2	Holt Rd - east	Fakenham	Small node of light industrial and trade services, including agricultural goods retailer, furniture supplier, auto servicing. Buildings are of a moderate standard and overall development form is relatively low intensity. Surrounding uses are residential.	1.23	0	Neighbouring residential uses	Fully developed
EMP08	Oxborough Ln	Fakenham	Site near to the town centre of Fakenham comprising Aldiss, Kinnerton Confectionery and warehousing uses. Access to the site is very constrained, both direct access through the narrow Oxborough Ln and the wider access through the town centre. The warehousing uses to the east of the site are in poor condition. Other buildings are of a moderate to good quality. East of the designated land is the Residential/Mixed Use allocation F10, which would need to secure access, but could cater to some employment expansion in this location if required (e.g. expansion of Kinnerton).	4.81	0	Access is very narrow Wider highways constraints through town centre Potential conflicts with neighbouring uses	Potential intensification of uses to support Kinnerton Confectionery and Aldiss growth needs. Improvements to access required to support further development on this site.

Site Ref. Number	Name	Location	Site Description	Site Size, ha – Baseline	Site Size, ha – Realistically Available	Constraints	Development Potential
EMP09	South of Hempton Rd	Fakenham	Collection of uses fronting Hempton Rd at southern limit of Fakenham settlement. Servicing the local market, uses include tyre servicing, landscape materials, auto sales, engineering, museum. Buildings are a mix of quality and sizes, including some premises clearly in need of refurbishment or renewal. No vacant land in this location, though some sites are underdeveloped.	1.97	0		Potential intensification of uses, or consolidation of sites for a single, larger entity. However, this is likely to be a long-term prospect.
EMP10	South of Hempstead Rd	Holt	Small agglomeration of uses to the south of Hempstead Rd. Hempstead Rd Business Centre is an office building with warehousing uses to the rear. At the time of inspection, the office space was partially occupied. The rest of the land is comprised of Bookers outlet and food manufacturer. Access via Hempstead Rd (restricted access) and Heath Drive (new, main access) requires passing residential dwellings	4.11	0	Access through residential areas	Fully developed
EMP10/1	Heath Dr Industrial Estate	Holt	Industrial estate comprising mix of B1, B2, B8 uses, from small storage/workshop units to mid-sized depots. Car parking is a mix of off-street and on-street parking. Access via Hempstead Rd (restricted access) and Heath Drive (new, main access) requires passing residential dwellings. Vacant land is the western portion of this designation as well as narrow land parcels in the north. The vacant land is predominantly flat and developable. A proposed employment allocation (H27/1) is located to the west of the industrial estate.	5.93	3.6	Access through residential areas	Potential for a mix of B1, B2, B8 uses, similar unit size mix to surrounding industrial areas. Site is currently being marketed for pre-lets of industrial units at about 450 sqm
EMP11/1	Thaxters site	Holt	Current uses are a veterinary surgery, plumbers and youth centre, which are in buildings of basic to moderate quality. Over half the land is vacant, formerly occupied by Thaxters. Planning permission was granted in 2015 for a food store on this site, however this has not progressed. Site has good prominence on A148.	0.97	0.51	Narrow access from rear of site. Is direct access from A148 available?	Notwithstanding the unenacted planning permission, there would be some potential for small B-class units on this site, benefiting from the A148 prominence. However, with the planning permission, while not progressed, a retail outcome is more likely and should be assumed to be unavailable for B-class uses.
EMP11/2	Tyre Pros	Holt	Designation include tyre fitting outlet and adjacent BT facility. Site has good prominence on A148.	0.28	0		Fully developed
EMP12	Tilia Business Park	Hoveton	Approximately two-thirds of the site is Tilia Business Park, with Oyster Yachts being the largest occupier, including B1 and B2 units. Tilia Business Park is	6.78	1.84	Poor layout	Northern site's development potential would be for expansion of uses for Oyster Yachts as required. Due to backlands

Site Ref. Number	Name	Location	Site Description	Site Size, ha – Baseline	Site Size, ha – Realistically Available	Constraints	Development Potential
			accessed via Tunstead Rd, past residences and a school. There is some spare land (1.08 ha) to the north of Oyster Yachts that would require access through existing car parks and a further parcel of land (0.76 ha) to the south that would also be accessed via Tunstead Rd. The southern portion of the allocation is Station Business Park, a mix of retail, B1 and B2 units. Station Business Park is separated from Tilia Business Park, with no significant functional relationship.			Access to northern half of site via residential streets Remaining sites are in backland locations.	location and access, other uses unlikely to be practical. Southern site could be developed for B2 or B8 uses, including open storage. Shared access point with Oyster Yachts would need to be resolved.
EMP13	Hoveton East Employment Area	Hoveton	Older industrial estate, with some buildings of a poor standard. Jewsons is the largest occupier to the rear of the estate. Remainder of estate is predominantly smaller industrial units/workshops with low ceilings, comprising SMEs, including vehicle servicing, engineering. Vacant site is within Benthic Solutions ownership, which built a unit on the remainder of their site. The Benthic Solutions land is not within the existing employment area allocation, though as part of its development the road was extended to include this site and it is therefore recommended that the Benthic Solutions land be incorporated into the allocation. Land to the east of Benthic Solutions (east of road extension) should also be considered for employment uses.	3.39	0.27	Poor prominence towards the rear of the industrial estate.	Potential for small scale units.
EMP14	Melton Constable Industrial Estate	Melton Constable	Industrial estate in the western part of Melton Constable. The estate does not have much prominence as it is set back from the B1354 and is accessed via Marriott Way, which is a minor street and has housing. The occupiers are predominantly B2 uses, with some B8 units. A high level of vacancies was observed at the time of inspection, most notably the former Structure Flex unit, which is a large unit that has been vacant for a considerable time. This unit has some dereliction (e.g. broken windows).	6.86	0		Potential regeneration site though would need to establish sufficient demand for uses in this location. Regeneration sites are buildings that are low term vacancies. Likely that more modern, high spec units would attract local interest, particularly with other locations having limited supply. However, cost of regeneration is likely to be prohibitive, without other funding sources.
EMP15	Lyngate Rd Industrial Estate	North Walsham	Industrial estate focused on Lyngate Rd, Folgate Rd and Laundry Loke, comprised of a mix of unit sizes and qualities. Busy estate with high occupancy rates. Some occupiers have multiple units in the estate, as they have been unable to acquire consolidated premises. Newer units are located in the north-west of the estate, with recent	28.68	0.62	Busy industrial node	B2 or B8 units of a range of sizes are in demand in this location. Site could be taken by either a single occupier or developed for several smaller occupiers.

Site Ref. Number	Name	Location	Site Description	Site Size, ha – Baseline	Site Size, ha – Realistically Available	Constraints	Development Potential
			building undertaken for B2 uses. some further capacity is available in this area within the allocation, including a 0.62 ha site and potential to tidy up low value outdoor storage uses (HGV parking, dumping of fill). On-street car parking adds to perception of busyness, though wide spine roads help to mitigate this. Proposed employment area is adjacent to this area to the west which would provide further expansion options. Broader access to the site is limited by low rail bridges, which limit connectivity to the estate and perceptions of market attractiveness. A single B2 unit has been recently built outside of the allocation, which should be incorporated into the allocation in the emerging Local Plan. Significant occupiers include a cluster of plastic manufacturers.				
EMP16	Midland Rd Industrial Estate	North Walsham	Mix of local services, including motor services, funeral services, sign making, vets that have proximity to the A149. Building quality is moderate. Car parking is a mix of off-street and on-street, with some movement difficulties. No vacant land is within this allocation.	1.31	0		Fully developed
EMP17	CT Baker	North Walsham	Single occupier site, comprising a building suppliers' firm. Site is fully occupied. Located between the rail corridor and a substation there are no opportunities for expansion. May be long-term pressures for redevelopment given its proximity to North Walsham rail station.	0.41	0		Fully developed
EMP18	Cromer Rd Industrial Estate	North Walsham	Mix of uses at the western entrance to North Walsham, including B2, B1 uses, supermarket, vacant and unused brownfield land. Wall Engineering has a significant unit, outdoor storage and underused land in the north (rear) of the site. Citygate Developments has about 3 ha that incorporates a modern office building (occupied by Victory Homes), vacant land fronting Cromer Rd and former industrial buildings that have been partly dismantled. The 2.55 ha estimated to be vacant is the grassed site fronting Cromer Rd and the partially dismantled units (i.e. brownfield land). Further land may become available if Wall Engineering consolidate their site.	10.83	2.55		Potential for development to be linked to western extension development. Mix of B1, B2, B8 uses of a broad range of sizes. Further opportunities would be opened up if link road extends to Lyngate Rd Industrial Estate

Site Ref. Number	Name	Location	Site Description	Site Size, ha – Baseline	Site Size, ha – Realistically Available	Constraints	Development Potential
EMP19	Travis Perkins	North Walsham	Site to the east of EMP18 also on Cromer Rd. Contains Travis Perkins and a vacant lot to the rear of the site that does not have direct access at the moment.	0.6	0.18		Small site without road frontage. Likely to be difficult to develop in isolation. Development is only likely to be an expansion of Travis Perkins' operations, which is not planned for at this stage.
EMP20	Weybourne Rd	Sheringham	Employment node comprising industrial uses and leisure centre. Industrial units are of basic quality, with some premises in need of refurbishment. Car parking and hardstand areas are also in need of an upgrade. Uses include engineering, food manufacturing, office uses, auto servicing. The western part of the node is a NNDC-owned leisure centre, which is currently undergoing redevelopment. The redevelopment will reposition the leisure centre closer to Weybourne Rd, with the car parking to the rear. The redevelopment will free up land in the east of NNDC's ownership, which could be used for alternative purposes and is currently be marketed for a hotel development site.	2.26	0	Employment node has a poor layout	Leisure facility is under construction. Land for hotel development currently being marketed
EMP21	Yarmouth Rd employment area	Stalham	Nicholsons car sales and service station front the site, with small industrial units to the rear, of a basic quality. A residential dwelling is located within the allocation but unlikely to be converted in the foreseeable future.	1.49	0		Fully developed
EMP23	Polka Rd	Wells-next-the-Sea	Mix of uses for local needs of Wells. This node is not acting as an integrated estate. The southern parcel of land is occupied by Co-op retail store, which is a modern unit. The eastern portion is Orchard Caravans - a retailer of caravans and mobile homes, which is the largest land occupier in the node. Older workshop units are located to the north of Co-op and these units are small and in need of refurbishment and appear to be underutilised at present. There is also some outdoor storage within the node. The vacant land parcel is to the east of the Co-op but does not have prominence. Further sites within this area could be redeveloped, if demand was demonstrated.	2.54	0.23	Poor prominence	Remaining vacant parcel is small and does not have frontage to the main road. Opportunities for this site would be for very small enterprises serving the local market. Small scale industrial or storage facilities would be appropriate. Some regeneration of poor quality units would be anticipated over the planning timeframe. There may be pressure for non-employment uses (i.e. residential) on part of the site.
EMP24	West of Thorpland Rd	Fakenham	Thorpland Rd is a very narrow laneway, that while close to the A148 does not currently connect with the A148. Access to Thorpland Rd is from the south, via Holt Rd. The site is mainly vacant and flat and used for farming. Some of the site has derelict farm	6.11	6.11	New access point required	Potential for an expansion of the employment node to the west. Site has good prominence with frontage to the A148.

Site Ref. Number	Name	Location	Site Description	Site Size, ha – Baseline	Site Size, ha – Realistically Available	Constraints	Development Potential
			storage buildings. There appears to be remnants of some demolished buildings. Site is to the west of the northern section of EMP06, with access potentially via the existing roundabout near the medical centre.				Opportunity for a significant range of unit sizes and a mix of B1, B2, B8.
EMP25	Heath Dr North	Holt	Employment site as part of the broader Heath Farm development. The proponent's phasing plan presented as part of the planning application identifies this site for A2, A3, B1, C1, C2, D1. Therefore, this site should not be considered as fully available for B-class uses.	1.68	1.68	Neighbouring residential uses	Likely to be for a mix of uses in line with outline planning application. B-class uses are likely to be only small scale office units as part of a wider development.
EMP26	Norwich Rd	North Walsham	Recent development of units on site, including vets, Screwfix and other speculatively developed B2/B8 units.	1.52	0	Narrow site	Fully developed, though not fully occupied.
EMP27	Norwich Rd	North Walsham	Outline permission for commercial uses on this site, as part of a hybrid application that also includes full planning permission for 100 dwellings. Construction of residential dwellings has commenced.	0.84	0.84		Outline planning consent for A3, A4, B1, B8, C2 uses.
EMP30	Ludham employment area	Ludham	Small car sales centre and service station on the high street. No vacant areas available. Parking to the rear.	0.27	0		Fully developed
EMP31	Cromer Rd	Mundesley	Very small node comprising a Tesco Extra and a car sales/servicing dealer and therefore not functioning as a true B-class employment node.	0.25	0		Fully developed
	Catfield	Catfield	Trend Marine has several buildings within the employment area. Buildings of varying quality, including some in need of refurbishment. Potential for consolidation of uses and improvements of internal movements within site. NNDC has workshop units within the site. Vacant site is flat with frontage to The Street and could be used for B2, B8 uses.	11.8	0.34		Potential for small B2, B8 uses, either a single occupier or a small number of smaller occupiers
	Old Market Rd	Stalham	Site is under construction for retirement housing. Not available for employment uses and should be removed from allocations.	1.02	0		No longer available for B-class employment uses and is being deallocated.
	Land off North Rd, Blakeney	Blakeney	Small site on key road through Blakeney comprising a garage and petrol filling station. No available land remaining at this site	0.18	0.0		Fully developed
	Land north of B1149, Corpusty	Corpusty	Site at the northern edge of the village, comprising basic level warehouse/industrial units and a garage. Uses appear to be for rural purposes, servicing surrounding areas. No vacant land available.	1.16	0.0		Fully developed

Site Ref. Number	Name	Location	Site Description	Site Size, ha – Baseline	Site Size, ha – Realistically Available	Constraints	Development Potential
	Land north of High St	Mundesley	Small site occupied by a single business, a garage/MOT centre. Surrounding uses are residential, which suggest that longer term uses may not be for B-class uses. No vacant land available.	0.16	0.0		Fully developed
	Land off Norwich Rd	Roughton	Small site on key western side of north/south road comprising a single business, a garage and petrol filling station. Surrounded by residential uses. No vacant land available.	0.13	0.0	In Flood Zone 2 and 3	Fully developed
Employment Allocations							
H27/1	Land at Heath Farm	Holt	Moderately flat site to the west of Heath Rd Industrial Estate (EMP10/1). Appears to be a logical extension of the industrial estate and would support similar uses. Access arrangements would need to be determined, with likely options via Hempstead Rd or Heath Dr (if connected) coming past housing.	5.43	5.43		Medium to long term development potential for a mix of employment uses. Could accommodate range of units from starter units to mid-sized premises.
E10	Land off Cornish Way	North Walsham	Potential extension site for the Lyngate Rd Industrial Estate. Access would be through existing industrial estate roads, although through this site would also be logical corridor for a link road to the western extension area and Cromer Rd. Good opportunity site for growth of this area to relieve capacity issues within existing area.	5.11	5.11	Low Plains Farmland	Good opportunity for a range of B2 and B8 uses as well as providing land for a link road to Cromer Rd. This link road and the shape of the site will mean that the land yield is reduced.
Proposals for Other Areas							
E7	Tattersett Business Park	Tattersett	Large site on a former RAF airfield. Located in the west of the District, the site is closer to central England areas than elsewhere, potential being seen as better positioned within the wider context. However, rural location removed from key settlements means that the site lacks local prominence. Some existing businesses and infrastructure on site, including lower order enterprises and basic quality premises. Significant infrastructure and regeneration of the site would be required to broaden the types of employment uses attracted to the area.	28.5 (landholding is larger than this)	3.87	Infrastructure provision Poor internal roads Poor quality buildings Lacks prominence	Site can continue to provide lower order/lower intensity employment uses. However, if broader uses are to be expected, than significant improvements in the infrastructure and amenity would be required, including increasing electricity capacity. If such provision would be made, then there would be some increased opportunities for premises, for land consumptive enterprises, but would still likely to be of lower value. Landholder has expressed interest in a mixed-use development, including significant residential dwellings. Landholder is not looking to invest significantly in employment uses.
Enterprise Zones							

Site Ref. Number	Name	Location	Site Description	Site Size, ha – Baseline	Site Size, ha – Realistically Available	Constraints	Development Potential
	Scottow Enterprise Zone	Scottow	Scottow Enterprise Park is one of 10 sites within the Space to Innovate Enterprise Zone across Norfolk and Suffolk. Scottow Enterprise Park is a former RAF airfield and base that has been repurposed as an employment node. Buildings are of a mix of quality, from poor to good, refurbished stock. Focus of growth of this area has been in the reuse of the existing built stock, with further options still available to the market. However, there are opportunities for the development of new build within the EZ.	240 (full site) 26 (EZ area)	7.3 approx.	Some poor quality buildings Poor access through local highways network	Development opportunities within the EZ would be for B2 and B8 uses. Continuation of the conversions of existing buildings could accommodate a range of employment uses, and is attracting those operators that require large, cheap spaces. The EZ incentives are coming to an end, which poses a risk to the continued attractiveness of the sites as a business destination.
	Egmere Enterprise Zone	Egmere	Egmere EZ is in a rural location and includes some existing employment uses including offices connected to the offshore energy sector and stock feed manufacturing. The undeveloped land has been subject to the Egmere Local Development Order (LDO), though this has now lapsed. The intent for this site has been to provide further land for offshore energy businesses, though even with the EZ status and the LDO support, this has not eventuated. On-going uses are likely to be lower-order uses connected to the rural economy, or some small storage/maintenance uses with the energy sector.	21.5	5.0	Rural location	The policy support and incentivisations through the EZ and LDO have not delivered growth for this site. Further expansion of the site is likely to be slow and long term, with viability of any scheme proving to be a limiting factor. Outdoor storage or small to mid-sized workshops are the most likely markets for this site. The EZ incentives are coming to an end.
Mixed Use Allocations with Potential for Employment							
NW01/B	Land at Norwich Rd and Nursery Dr	North Walsham	To include retention and enhancement of 2 ha of employment land and development of 350 dwellings. Employment uses are already on site, including Ladbrook and a garden centre.	18.62 Inc 2.0 of empl.	2.0	Not a consolidated site, with access from two locations	Development will be residential led. This provides some opportunity to regenerate the employment uses on site, with Ladbrook indicating through the consultation process that they are looking to update their facilities.
NW62	North Walsham Western Extension	North Walsham	To include 7 ha of employment land, 1,800 dwellings, link road, public open space. Land is in multiple ownerships, though a landholder consortium has been established as is looking to proceed with the residential components of the development. Employment land opportunities would be to the north of Cromer Rd.	95	7.0	Multiple land parcels and ownerships Substantial infrastructure requirements	Development will be residential led. Consortium is actively proceeding with planning for the site. The likely employment land to the north of Cromer Rd could be developed separately. A spine road would benefit the site, including employment areas and relieve traffic issues in North Walsham. Employment uses likely to be a wide range of unit sizes and incorporate B1, B2, B8 uses. High profile tenants in good quality premises could be expected.

Site Ref. Number	Name	Location	Site Description	Site Size, ha – Baseline	Site Size, ha – Realistically Available	Constraints	Development Potential
ST23/2	Land north of Yarmouth Rd	Stalham	Mixed-use site identified in the First Draft Local Plan for 80 dwellings and employment, community facilities and open space. Site is flat and seemingly developable in straightforward manner. Employment components would require road frontage and prominence.	4.12	2.0 (approx.)	Grade 1 agricultural land (part)	Potential for a range of small B1c, B2 and B8 units servicing the local rural and town communities. As part of a mixed-use development, the employment uses should be low-impact. Likely to be medium term opportunity developed in concert with other components.

Source: BE Group assessment of sites

6.4 The above assessment of the employment sites in North Norfolk provides the base understanding of the development potential throughout the District. As can be seen from the table, most sites with land available for development would be suitable for a range of uses, which are consistent with the use types in demand that were identified in the property assessment and through the consultations. Table 14 below provides a summary list of the sites with total and available land estimates.

Table 14 – Summary of Employment Sites

Site Ref. Number	Name	Site Size, ha – Baseline	Site Size, ha – Realistically Available
Employment Land			
EMP02	Norwich Rd	0.62	0
EMP03/1	East side of Holt Rd	5.78	0
EMP03/2	West side of Holt Rd	8.70	1.72
EMP04	Area around Cromer Rail Station	3.13	0
EMP05	Fakenham Industrial Estate	29.05	3.12
EMP06	Enterprise Way	9.92	0
EMP07/1	Holt Rd - west	0.96	0
EMP07/2	Holt Rd - east	1.23	0
EMP08	Oxborough Ln	4.81	0
EMP09	South of Hempton Rd	1.97	0
EMP10	South of Hempstead Rd	4.11	0
EMP10/1	Heath Dr Industrial Estate	5.93	3.60
EMP11/1	Thaxters site	0.97	0.51
EMP11/2	Tyre Pros	0.28	0
EMP12	Tilia Business Park	6.78	1.84
EMP13	Hoveton East Employment Area	3.39	0.27
EMP14	Melton Constable Industrial Estate	6.86	0
EMP15	Lyngate Rd Industrial Estate	28.68	0.62
EMP16	Midland Rd Industrial Estate	1.31	0
EMP17	CT Baker	0.41	0
EMP18	Cromer Rd Industrial Estate	10.83	2.55
EMP19	Travis Perkins	0.60	0.18
EMP20	Weybourne Rd	2.26	0
EMP21	Yarmouth Rd employment area	1.49	0
EMP23	Polka Rd	2.54	0.23
EMP24	West of Thorpland Rd	6.11	6.11
EMP25	Heath Dr North	1.68	1.68
EMP26	Norwich Rd	1.52	0
EMP27	Norwich Rd	0.84	0.84
EMP30	Ludham employment area	0.27	0
EMP31	Cromer Rd	0.25	0
	Catfield	11.80	0.34
	Land off North Rd	0.18	0.0
	Land north of B1149	1.16	0.0
	Land north of High St	0.16	0.0
	Land off Norwich Rd	0.13	0.0
Subtotal		166.71	23.61
Employment Allocations			
H27/1	Land at Heath Farm	5.43	5.43
E10	Land off Cornish Way	5.11	5.11
Subtotal		10.54	10.54

Site Ref. Number	Name	Site Size, ha – Baseline	Site Size, ha – Realistically Available
Other Proposals			
E7	Tattersett Business Park	28.5 (landholding is larger than this)	3.87
Subtotal		28.5	3.87
Enterprise Zones			
	Scottow Enterprise Zone	240 (full site) 26 (EZ area)	7.3 approx.
	Egmere Enterprise Zone	21.5	5.0
Subtotal		47.5	12.3
Mixed Use Developments			
NW01/B	Land at Norwich Rd and Nursery Dr	18.62 Inc 2.0 of empl.	2.0
NW62	North Walsham Western Extension	95 Inc 7.0 of empl.	7.0
ST23/2	Land north of Yarmouth Rd	4.12 Inc 2.0 of empl.	2.0
Subtotal		11.0	11.0
Total		264.25	61.32

Source: BE Group assessment of sites, 2021

6.5 Therefore, from the assessment of the realistic supply of developable land in North Norfolk, it is **estimated that there is some 61.32 ha of land available to be developed for employment uses.**

6.6 The following table provides an amalgamation of the individual sites with available employment land into settlements and into three broader sub-regions, reflecting the overall geography of North Norfolk.

Table 15 – Total Remaining Available Employment Land

Location	Existing Employment Areas (Including Enterprise Zones) Already Developed (Ha)	Existing Employment Areas (Including Enterprise Zones) Undeveloped (ha)	New Proposed Allocations (ha)	Total Available Employment Land over the plan period
Eastern Area Totals	78.87	15.46	16.11	31.05
Catfield	11.46	0.34		0.34
Hoveton	8.06	2.11		2.11
Ludham	0.27	0		0
Mundesley	0.41	0		0
North Walsham	38.48	4.19	14.11 (Policies DS 14, DS 15, DS 16)	18.30
Scottow	18.70	7.30		7.30
Stalham	1.49	0	2.00 (Policy DS21)	2.00
Central Area Totals	34.10	7.51	5.43	12.94
Corpusty (Saxthorpe)	1.16	0		0
Cromer	16.51	1.72		1.72
Holt	7.18	5.79	5.43 (Policy DS 12)	11.22
Sheringham	2.26	0		0
Melton Constable	6.86	0		0
Roughton	0.13	0		0
Western Area Total	88.44	18.33	0	18.33
Blakeney	0.18	0		0
Fakenham	44.82	9.23		9.23
Egmere	16.50	5.00		5.00
Wells-next-the-sea	2.31	0.23		0.23
Tattersett	24.63	3.87		3.87
Total Across District	201.41	41.30	21.54	61.32

Source: North Norfolk District Council

- 6.7 From the evidence gathered in this report, including transactional evidence and data gathered from consultations, it is appropriate that the **Eastern** sub-region has the largest share of available land area in the District over the planning period. Within the Eastern sub-region it is reasonable that North Walsham has the highest level of available land area, given the requirements for large units from several B2/B8 operators. Given that some of these requirements are for units significantly above the average for units in North Norfolk (e.g. >5,000 sqm), the availability of larger sites in

North Walsham is a strength. Scottow Enterprise Zone, with the second largest quantum of employment land in the Eastern sub-region, provides an alternative to the sites in North Walsham, including inexpensive accommodation and sites for businesses not requiring a site within a town. Other sites would provide local employment accommodation to service the smaller settlements. For a locality such as Catfield, which has a relatively high level of existing employment land compared to the size of town, the small available land for growth suggest that further growth at this locality will only be limited (unless consolidation on brownfield sites is undertaken).

- 6.8 In the **Central** sub-region, the significant majority of the available land is within Holt. This land would be servicing the Central sub-region as a whole, providing alternatives for other settlements that have more limited choice, most notably the limited supply in Cromer. Given this area is a more localised market (with the Eastern and Western sub-regions having larger businesses and more outward looking economies), it is appropriate that the Central sub-region has the lowest share of available land.
- 6.9 Approximately half of the available land within the **Western** sub-region is within Fakenham, and it is appropriate that this town provides the largest quantum in this area. The other half is mostly located in Egmere or Tattersett, two rural locations that have been available for several years, with only limited take-up. This compares to the very low levels of vacancies in Fakenham. Therefore, it may be more appropriate to further concentrate available land in Fakenham, with less reliance on rural employment sites.
- 6.10 These sites represent a mix of infill sites within existing employment areas, greenfield sites, new allocations and the proposed employment components of mixed use sites. Some of these sites will be developed without intervention or stimulus from the public sector, whereas others are likely to require some sort of intervention to help to initiate development.
- 6.11 For the purposes of this study, which looks to provide guidance on delivery and an action plan for key sites, we have considered the following factors to select the appropriate sites for further analysis.
- Can the site meet the key demand requirements as identified from the property market assessment and consultations?

- Predominantly industrial units
- Smaller units would be the most commonly required type
- Some mid to larger units – particularly from key local businesses looking to expand
- Does the suite of sites provide a good geographic spread throughout North Norfolk, particularly in the key settlements?
- Is the site likely to be developed in a timely manner without interventions?
- Is the site of sufficient scale to accommodate a range of uses?
- Would there be a community benefit for the timely development of the site?

6.12 Therefore, the following sites have been selected for further guidance on the delivery of employment uses.

Table 16 – Shortlisted Sites

Settlement	Employment Sites	Comment
North Walsham	EMP18 Cromer Rd IE NW62 North Walsham Western Extension	The employment component of the Western Extension area is likely to be adjacent to EMP18 and thus these sites are considered together.
Holt	EMP10/1 Heath Dr IE H27/1 Land at Heath Farm	These sites, either side of the existing industrial estate, should be considered in unison as they will be competing for the same market. A holistic review of this location is preferred.
Fakenham	EMP24 West of Thorpland Rd	Large site in a key location. While appearing attractive for employment it is remained undeveloped for some time. With very little of land available in Fakenham it is important that this site is delivered in a timely manner.
Melton Constable	EMP14 Melton Constable IE (part)	Regeneration opportunity of the former Structure Flex building, which is unlikely to be reoccupied in its current form.
Catfield	Catfield Industrial Estate	Consolidation opportunity of existing industrial estate that has a poor layout. Potential for consolidation of uses.

6.13 In addition to the above employment sites, alternative sites that do not have planning support have been considered in Fakenham– the Fakenham Football Club site at the south-eastern corner of the intersection of the A148 and Clipbush Lane site and the agricultural field to the south of the Fakenham Football Club. These sites have been considered due to the need for further land in Fakenham to be developed for employment.

- 6.14 Two larger sites that have not been included are the Scottow Enterprise Park and Tattersett Business Park. It was considered that as the Scottow Enterprise Park has Enterprise Zone status and under the control of Norfolk County Council that there would only be limited further interventions that North Norfolk District Council could consider. For the Tattersett Business Park, it was considered that there was little prospect of a high-profile, viable scheme that would meet North Norfolk's needs in the foreseeable future.

7.0 EMPLOYMENT LAND NEED

Introduction

7.1 The following section reviews the employment land requirement in North Norfolk to 2036, which is the horizon of the First Draft Local Plan. This requirement will then be compared to the realistic supply of employment land reviewed in Chapter 6.0.

7.2 Employment land requirement forecasting is inexact and subject to uncertainties due to fluctuations in the economy, business confidence, demographics and market preferences. As such BE Group looks at employment land requirements from the following perspectives:

- Past Land Take-up
This reviews the actual take-up of employment land in North Norfolk over time and uses the average of past take-up to extrapolate forward. The method is not wholly reliable as there will be peaks and troughs and different time periods taken can also result in different outcomes. For example, a period of sustained growth may show a high average take-up, whereas looking over a recessionary period could well reflect low or even nil take-up. This assumes that the employment land performance will follow past trends, which may be a reasonable starting point, but if further interventions are proposed may underestimate future take-up.
- Labour Demand Forecasting
This relies on the econometric forecasts of the East of England model, which projects the likely jobs growth in different industry sectors. The jobs figures are then translated to land using a formula based on jobs to floorspace density, which in turn can be translated into the projected land need.

Employment forecasts and the resulting estimations of employment premises and land have several limitations. The forecasts are based on national and regional trends with some local adjustments for some industry sectors, which means, at a local level economic activity is not always accurately represented. Also, merely translating jobs to land needs will not always reflect local property trends and assumes that jobs changes always lead to floorspace demand

changes, which may not be the case (e.g. at times of introducing automation or other efficiency changes into business operations).

The econometric forecasts are useful in that they analyse each industry sector and, in conjunction with other market data, the forecasts can identify where sectors may be growing, or shrinking which in turn can inform land and property needs.

- Labour Supply Forecasting

This method looks at the forecast residential growth in the District and the resulting implications of providing jobs for the changing population. This approach is subject to several assumptions in relation to participation in the workforce, commuting patterns and employment types. Furthermore, as seen in Chapter 3.0, population growth is anticipated to be driven by the 65+ year cohort, with a decline in the traditional working age population (16-64 years). Therefore, demand for jobs from the residential population is likely to be low, with resultant low floorspace and land requirements, which would not reflect a growth agenda.

- Policy On Labour Demand Forecasting

An adjusted labour demand forecast to account for job implications arising from policy interventions in the local market that are considered to be not adequately accounted for in the East of England model. For North Norfolk, this is likely to be in relation to the Enterprise Zone at Scottow Business Park and the level of employment over and above trend that is anticipated at North Walsham due to the North Walsham Western Extension proposal.

7.3 The forecast period is 2016-2036, in line with the First Draft Local Plan.

Past Land Take-up

7.4 The first approach of looking at employment land requirements over the forecast period is to consider the past take-up rates of employment land. This approach assumes that the characteristics of the demand for employment land will be comparable to the recent past.

- 7.5 The Norfolk County Employment Land Monitoring Report 2019 (the most recent published monitoring report) stated that North Norfolk's average annual take-up of employment land was 1.6 ha since 2000. Therefore, this average is over a considerable time period and would reflect strong economic times, the recession of 2009-09 and post recessionary growth. Therefore, the average of 1.6 ha per annum is a robust base to project forward employment land take-up, as it would be expected that in the period to 2036 that there would be strong growth and recessionary periods within the economy.
- 7.6 Adopting this average out to 2036, there would be a requirement of some 32.0 ha of employment land between 2020 and 2036.
- 7.7 However, it would also be prudent to accommodate for some level of uncertainty in the projection to 2036, given that there are fluctuations in market activity that cannot be accounted for in the modelling. Furthermore, it is appropriate to add a level of choice into the market, as it is unusual for every last land parcel to be taken up in an orderly manner. Therefore, a buffer, equivalent to five years of take-up is recommended to added to the requirement as a means of approximating for this. The five year buffer would be 8.0 ha, therefore using this methodology, the **recommended requirement for employment land between 2016 and 2036 would be 40.0 ha.**
- 7.8 There has been some concern in recent times in North Norfolk that a lack of supply of readily developable and appropriate employment sites has dampened take-up in the District. Using this methodology to forecast across the planning period means that any suppressing of the take-up due to supply constraints in recent years would be built into the forecasts. This reinforces the need for a five year buffer to allow for this uncertainty.
- 7.9 If further readily developable employment land is made available to the market then there is likely to be a spike in take-up (i.e. above average levels) in the short term, as the market responds to this new supply. This would moderate over the planning period, and it is typical with an area's employment market to see peaks and troughs of take-up as supply becomes available and is consumed.
- 7.10 It is also prudent to look at how this employment land area could be broken down into office, industrial and warehousing uses, including potential floorspace requirements.

From the review of the property market in previous chapters, it was identified that the industrial and warehousing market has been more active in terms of transactions of existing stock in recent years. Furthermore, the requirements identified through the consultation process were for industrial and warehousing units. The office market is significantly smaller in North Norfolk, though still seeing demand for small units, which would need to be accounted for in the forecasts.

- 7.11 The following table provides an indicative breakdown of the forecast employment land into office, industrial and warehousing uses. However, this should not be read as prescriptive, with flexibility important in the development of the employment sites. Many sites have the potential to support a mix of employment uses and limiting sites at this stage would not encourage development.

Table 17 – Indicative Requirement of Employment Uses 2016-36 (inc. buffer)

Use Type	Land Area (ha)	Floorspace (sqm)	Floorspace (sqm) p.a.
B1a Office	5.0	20,000	1,000
B1c/B2 Industrial	20.0	80,000	4,000
B8 Warehousing	15.0	60,000	3,000
Total	40.0	160,000	8,000

Source: BE Group, 2021

Labour Demand Forecast

- 7.12 As reviewed in Chapter 3.0, Cambridge Econometrics produces the EEFM, which includes employment forecasts for North Norfolk. The latest iteration of this model projects that North Norfolk will have an increase in employment numbers between 2016 and 2036 of about 1,880 jobs. However, this increase is not uniform between the sectors, with key B-class sectors such as manufacturing forecast to have a decline in employment numbers.
- 7.13 The East of England Model includes calculations of total employment floorspace demand by year, based on the employment numbers. This is calculated through a jobs density (sqm/worker) assumption for each employment sector. The Model calculated the following for North Norfolk.

Table 18 – East of England Forecasts for B-class Employment Floorspace, 2016-2036

Floorspace Type	Change in Demand 2016-36 (sqm)
B1a Office (now Eg(i))	+5,200
B1c/B2 Industrial	-27,900
B8 Warehousing	+7,900
Total	-14,800

Source: *East of England Forecasting Model, 2019*

- 7.14 Therefore, based on jobs forecasts, it is estimated that there is a negative demand for employment floorspace between 2016 and 2036. This infers that there would also be a negative demand for employment land (of about 3.7 ha at typical development densities of 4,000 sqm floorspace/ha). If just considering the growing office and warehousing based sectors, there would be demand for about 3.3 ha of employment land over the forecast period in North Norfolk.
- 7.15 BE Group has undertaken an independent assessment of the employment land implications of the employment changes in the EEFM, as seen in the table below.

Table 19 – Forecast Employment Land and Floorspace Demand based on East of England Forecasting Model, 2016-36

Sector	Workforce Growth 2016-36	Percentage Occupying B1/2/8 Space	Growth Number of Jobs on B1/2/8 Space	Floorspace Per Job, sqm	Floorspace Required, sqm
Agriculture, forestry & fishing	-1,408	5	-70	12	-840
Mining & quarrying	90	0	0	-	
Manufacturing	-974	100	-974	36	-35,064
Utilities	-11	26	-3	12	-36
Waste & remediation	196	26	51	12	612
Construction	538	26	140	12	1,680
Wholesale	176	100	176	70	12,320
Retail	1,006	0	0	-	
Land transport	-17	60	-10	70	-700
Water & air transport	4	20	1	70	70
Accommodation and Food Service Activities	1,980	0	0	-	
Publishing & broadcasting	-58	100	-58	12	-696
Telecoms	27	100	27	12	324
Computer related activity	32	100	32	12	384
Financial & insurance	-61	100	-61	12	-732
Real estate activities	258	100	258	12	3,096
Professional services	457	100	457	12	5,484
Research & development	0	100	0	12	0
Business services	-211	100	-211	12	-2,532
Employment activities	2	100	2	12	24
Public administration and defence	4	22	1	12	12
Education	-60	0	0	-	
Human Health and Social work activities	809	22	178	12	2,136
Arts, entertainment and recreational	-169	0	0	-	
Other services	17	22	4	12	48
Total	2,628		-60		
Increase in Floorspace – Growth Sectors (sqm)					26,190
Decline in Floorspace – Declining Sectors (sqm)					-40,600
Net Change in Floorspace Demand (sqm)					-14,410
Assumed Developable Floorspace per Hectare (sqm/ha)					4,000
Equivalent Employment Land Needed – Growth Sectors (ha)					6.5
Equivalent Employment Land Needed – Declining Sectors (ha)					-10.2
Equivalent Employment Land Needed – Net (ha)					-3.7

Source: BE Group analysis in 2021 of East of England Forecasting Model 2019 forecasts

- 7.16 The overall approach results in a consistent bottom line in terms of land area change and floorspace change compared to the EEFM modelling summarised in Table 18.
- 7.17 This independent approach highlights the sectoral differences in the implications for employment land and premises. Importantly, as seen in the table above, some of the strongest employment growth sectors over the planning period are not expected to have any impact on office, industrial or warehousing space (e.g. accommodation and food services, retail) or only a portion of that growth will be on relevant employment spaces (e.g. human health and social work, construction). Therefore, while employment growth is anticipated to be approximately 2,630 jobs over the forecast period, growth in jobs within typical office, industrial and warehousing units is projected to fall by an estimated 60 jobs. This is largely driven down by the decline in the manufacturing sector.
- 7.18 Therefore, the employment land requirement is calculated to be a decline of 3.7 ha between 2016 and 2036. However, it is prudent to just look at growth sectors, as those sectors with declining job numbers may not be immediately releasing land or floorspace to the market (e.g. declines in employment due to automation may not lead to declines in floorspace requirements). Therefore, **just considering growing sectors, the employment land requirement from this labour demand approach is 6.5 ha between 2016 and 2036. Allowing for a buffer equivalent to five years of growth, the employment land requirement would be 8.1 ha.**
- 7.19 It is important to note that this forecasting approach does not match with the research of this study, which suggests an unmet demand for employment floorspace, particularly from local manufacturing firms. Therefore, it is considered that this approach underestimates the floorspace and employment land demand.

Labour Supply Forecast

- 7.20 The changes in residential population (labour supply) forecast over the planning period could also provide some insight into the requirements for employment land in North Norfolk.
2600
- 7.21 The EEFM forecast that the resident employment (the number of North Norfolk residents in employment, no matter where they work) will increase from 38,200

workers in 2016 to 51,600 workers in 2036, an increase of 13,400 workers over the planning period. This is a substantial increase in the forecast of residential worker growth compared to the previous iteration of the EEFM (+2,600 workers), with the forecast 2036 worker population increasing, but also the 2016 figure being revised downwards. The EEFM does not provide a sectoral breakdown of employment. BE Group has estimated the changes in residential employment in North Norfolk, using the EEFM modelling of employment by sector of workers working in North Norfolk and the ONS information on recent residential workforce by sector.

- 7.22 This forecast residential workforce growth is significantly in excess of the EEFM forecast workforce growth for North Norfolk (+2,630). That is the growth of working *residents* of North Norfolk is projected to be higher than the growth in the number of workers *working* in North Norfolk. The inference of this is that the proportion of out-commuting would need to increase for those working residents to be in employment.
- 7.23 The table below provides BE Group's estimates of the changes to residential employment across the sectors and the subsequent implications for employment land requirements.

Table 20 – Forecast Employment Land and Floorspace Demand based on East of England Forecasting Model, 2016-36

Sector	Workforce Growth 2016-36	Percentage Occupying B1/2/8 Space	Growth Number of Jobs on B1/2/8 Space	Floorspace Per Job, sqm	Floorspace Required, sqm
Agriculture, forestry & fishing	-282	5	-14	12	-168
Mining & quarrying	116	0	0	-	
Manufacturing	5	100	5	36	180
Electricity, gas, steam and air conditioning	22	26	6	12	72
Water, sewerage & waste	164	26	43	12	516
Construction	2,260	26	588	12	7,056
Wholesale and Retail Trade	2,275	0	0	-	
Transportation and Storage	425	48	204	70	14,280
Accommodation and Food Service Activities	2,278	0	0	-	
Information and Communication	688	100	688	12	8,256
Financial & insurance	273	100	273	12	3,276
Real estate activities	414	100	414	12	4,968
Professional, Scientific and technical activities	1,213	100	1,213	12	14,556
Administrative and support services	529	100	529	12	6,348
Public administration and defence	77	22	17	12	204
Education	525	0	0	-	
Human Health and Social work activities	1,754	22	386	12	4,632
Other services	673	22	148	12	1,776
Total	13,409		4,500		
Increase in Floorspace – Growth Sectors (sqm)					66,120
Decline in Floorspace – Declining Sectors (sqm)					-168
Net Change in Floorspace Demand (sqm)					65,952
Assumed Developable Floorspace per Hectare (sqm/ha)					4,000
Equivalent Employment Land Needed – Growth Sectors (ha)					16.5
Equivalent Employment Land Needed – Declining Sectors (ha)					<0.1
Equivalent Employment Land Needed – Net (ha)					16.5

Source: BE Group analysis in 2021 of ONS Census data and East of England Forecasting Model 2019 forecasts

7.24 Transport and construction and professional services are anticipated to contribute the largest demand for additional floorspace under this scenario. The net employment land need is forecast to be 16.5 ha. With strong net change in overall employment numbers,

the sectoral breakdown also sees growth in all sectors except for agriculture, which only has a minor requirement for B-class floorspace. **Therefore, the growth only employment land requirement is also 16.5 ha. Allowing for a buffer equivalent to five years of growth, the employment land requirement would be 20.6 ha.**

- 7.25 Importantly for this forecast, this is a measure of the land requirement from the *residential workforce*, no matter where they work. As there is net out-commuting in North Norfolk (i.e. more workers travel outside of the District for employment than travel into the District for employment), the above calculated requirement would be an over-estimate of the land requirement using this methodology, as some of the land should be provided outside of the District. Furthermore, with the residential workforce growth anticipated to be larger than the growth in those working in North Norfolk, the proportion of out-commuting would increase. Therefore, some of the provision of this employment land requirement for this residential employment growth would be provided outside of the District.

Policy On Labour Demand Forecast

- 7.26 This approach uses an adjusted labour demand forecast to account for policy interventions or job changes that would not be adequately provided for in the on-trend EEFM. For North Norfolk, this is likely to be in relation to the Enterprise Zone at Scottow Business Park and the level of employment over and above trend that is anticipated at North Walsham due to the North Walsham Western Extension proposal.
- 7.27 Such employment is likely to be primarily in the manufacturing sector, with some further employment in the professional and technical services sector. If the District was to maintain the 2016 level of manufacturing employment over the forecast period, rather than the baseline trend of a decline of 970 workers, this would be seen as a solid win and well ahead of regional and national levels. Adding a further level of ambition and looking to grow the manufacturing sector by 5 percent would be a very strong result for the District. For the purposes of this policy on scenario, BE Group has adopted a 5 percent growth on 2016 levels for manufacturing.
- 7.28 Professional services sector is already anticipated to grow over the 2016 to 2036 period by 25 percent. This policy on scenario looks at the implications of the professional services sector growing at 30 percent.

- 7.29 The table below is a revised labour demand scenario that adjusts the manufacturing sector and professional services sector growth trajectories.
- 7.30 Under this scenario, the net employment land need is anticipated to be 7.3 ha between 2016 and 2036 (compared to -3.7 ha for the policy off labour demand forecast).
Looking at growth sectors only, the requirement is forecast to be 8.7 ha.
Including a five year buffer, the requirement is forecast to be 10.9 ha.

Table 21 – Forecast Employment Land and Floorspace Demand based on East of England Forecasting Model, 2016-36

Sector	Workforce Growth 2016-36	Percentage Occupying B1/2/8 Space	Growth Number of Jobs on B1/2/8 Space	Floorspace Per Job, sqm	Floorspace Required, sqm
Agriculture, forestry & fishing	-1,408	5	-70	12	-840
Mining & quarrying	90	0	0	-	
Manufacturing	214	100	214	36	7,704
Utilities	-11	26	-3	12	-36
Waste & remediation	196	26	51	12	612
Construction	538	26	140	12	1,680
Wholesale	176	100	176	70	12,320
Retail	1,006	0	0	-	
Land transport	-17	60	-10	70	-700
Water & air transport	4	20	1	70	70
Accommodation and Food Service Activities	1,980	0	0	-	
Publishing & broadcasting	-58	100	-58	12	-696
Telecoms	27	100	27	12	324
Computer related activity	32	100	32	12	384
Financial & insurance	-61	100	-61	12	-732
Real estate activities	258	100	258	12	3,096
Professional services	545	100	545	12	6,540
Research & development	0	100	0	12	0
Business services	-211	100	-211	12	-2,532
Employment activities	2	100	2	12	24
Public administration and defence	4	22	1	12	12
Education	-60	0	0	-	
Human Health and Social work activities	809	22	178	12	2,136
Arts, entertainment and recreational	-169	0	0	-	
Other services	17	22	4	12	48
Total	3,903		1,216		
Increase in Floorspace – Growth Sectors (sqm)					34,950
Decline in Floorspace – Declining Sectors (sqm)					-5,536
Net Change in Floorspace Demand (sqm)					29,414
Assumed Developable Floorspace per Hectare (sqm/ha)					4,000
Equivalent Employment Land Needed – Growth Sectors (ha)					8.7
Equivalent Employment Land Needed – Declining Sectors (ha)					-1.4
Equivalent Employment Land Needed – Net (ha)					7.3

Source: BE Group analysis in 2021 of East of England Forecasting Model 2019 forecasts, adjusted

Summary

7.31 The table below provides a summary of the four forecast scenarios.

Table 22 – Summary of Forecast Scenarios

Scenario	Land Requirement (inc. buffer)
Land Take Up	40.0ha
Labour Demand (growth only)	6.5ha
Labour Supply (growth only)	16.5ha
Policy On Labour Demand (growth only)	10.9ha

Source: BE Group, 2021

7.32 It is first noted that the EEFM 2019 model increased the growth forecast for workforce and resident workers in North Norfolk, compared to the previous iteration of the EEFM, which was analysed in the Stage One work of this study. Therefore, the forecast land requirements based on those forecasts (labour demand, labour supply and policy on scenarios) have all increased compared to the Stage One analysis. However, they remain below the land take up scenario.

7.33 In comparison to the realistic supply of employment land as at 2021 of 61.32 ha, any of the above scenarios suggest that there is sufficient supply of employment land allocated in the First Draft Local Plan to service North Norfolk's needs to 2036.

7.34 **It is recommended that the land take up scenario is the preferred scenario upon which to plan for employment land to 2036.** This appears to better reflect the on-the-ground market, particularly in relation to industrial land for manufacturing uses. The other scenarios, even the policy on scenario, appear to under-estimate the land required for industrial purposes over the planning period, not recognising the considerable short-term requirements that have been identified in this report.

7.35 Therefore, when comparing this preferred requirement of 40.0 ha between 2016 and 2036 to the current supply, there appears to be a spare capacity of about 21.34 ha.

7.36 It is not considered that that this is an excessive spare capacity, rather it provides further choice of location across the District, which is important given that there are distinct markets within the District, which each require adequate provision of

employment land. Furthermore, if actual take-up of land is above the forecast take-up (e.g. due to strong economic conditions or particular policy interventions), this spare capacity can accommodate this strong growth within the District, without opportunities being lost elsewhere.

- 7.37 The important factor is that the supply can be delivered within the planning timeframe. This Growth Sites Delivery Strategy will help to ensure that key sites are indeed delivered within a timely manner.

8.0 DELIVERY STRATEGY

8.1 This chapter provides advice on the potential ultimate development of the key sites and the means of achieving this outcome. Each site is assessed with recommendations as to how to deliver the sites, including recommendations on NNDC involvement in the sites and a proposed Action Plan in taking the sites forward.

Making the Case for Interventions

8.2 Local authorities can take a range of measures to support the local businesses and the economy. One type of support can be within the commercial property market, in order to ensure that there is sufficient land and premises available for local businesses to thrive. Such sufficiency should include considerations of type, scale, location, price and tenure. However, local authorities have other levers in which to support local businesses and with limited budgets not all options can be pursued.

8.3 It is our opinion that North Norfolk District Council should have a role in the local commercial property market for the following reasons:

- In recent years, the lack of available premises has been a substantial limiting factor in the commercial property market, with businesses unable to acquire adequate premises for their operations.
- The rural and coastal nature of the District means that it is not a high priority for commercial property developers, but there are constant pressures for further housing development. As such, landholders with employment allocations may look to hold back commercial development in preference for higher value residential schemes.
- Commercial schemes, even with demonstrable demand, can have substantial viability constraints, with development costs rising faster than values over recent years.
- The above two points are reasons that, despite the identified shortage of appropriate premises, the private sector has not developed on some allocated sites.
- Public sector interventions in the market can help to ameliorate the development risk through more than one entity, thereby helping to secure backing for projects.

- The District Council has a relatively low level of employment land holdings and employment premises, compared to many local authorities and thus at the moment has less direct scope to influence the market.

Economic Context

- 8.4 It is noted that this report is being prepared during the on-going Covid-19 pandemic, which is having substantial impacts on business confidence and economic performance. In particular for the property sector, the economic impacts include delays in construction, confidence in the market being substantially reduced, investors delaying decisions on investments and reduced business requirements for commercial premises. However, there have also been positive implications for the property sector, including demand for larger unit requirements for warehousing (e.g. warehousing to the growth in on-line retailing).
- 8.5 There is also the potential for this economic shock to have longer-lasting implications for the property sector, changing work-life arrangements, increasing the long-term incidence of remote working and changing the density of workers in a workspace. Furthermore, it may the accelerate usage of automated systems that reduce worker contact (and potentially overall worker numbers), such as further automated checkouts in retail outlets and automated selection and packaging in warehousing. Therefore, the property market would need to be cognisant of potential changes to work environments and demand for workspaces. New schemes may need to be more adaptable, allow for increased distances between workers and enable flexible working arrangements. New build schemes that incorporate such factors into their designs are likely to have a competitive advantage in the market.
- 8.6 North Norfolk already has a high number of workers that work fully or partly from home, perhaps commuting to cities outside of the area on 1-2 days per week. The attractive environment and lifestyle of North Norfolk is an incentive to this style of working arrangement. As large numbers of workers experience home working on a regular basis for the first time, the appeal of such an arrangement may further increase the incidence of this in North Norfolk beyond the lockdown.
- 8.7 The economic shock also potentially increases the impetus for a public sector intervention into the commercial property market to support local businesses and assist in the recovery of the economy. Such interventions could boost confidence in the

property market and may catalyse private sector investment to return. As the country emerges from Covid restrictions, there will be a need to provide further support to the economy to help businesses recover. Public sector support for businesses would need to move into a new phase with furlough being phased out, to more targeted support that would enable businesses to grow and ensure that their workplaces are safe and appropriate. Public sector interventions in the property sector can form a part of that support.

Potential Delivery Mechanisms

8.8 The following table provides a review of potential delivery mechanisms for employment sites that could be explored for sites in North Norfolk.

Table 23 – Potential Delivery Mechanisms

Mechanism	Description
Private Sector Led/Private Sector Funded	This will happen where development is financially viable, there are willing developers and market confidence in occupier demand and potential for rental growth. Public sector input may be more focused on nurturing market confidence through positive engagement by planning and economic development officers, to ensure a smooth delivery of the relevant property mix.
Mixed Use Development to cross-fund Employment Land	Responds to potential viability gap, but no direct public sector intervention. Rather council officers and the developer negotiate a suitable development mix which includes a strong element of higher value uses to offset the gap. This does not automatically mean housing but could include retail or leisure uses, appropriate to the location, which can also improve values. Pubs/restaurants, a gym or hotel are examples of uses that both generate reasonable returns for developers and can improve the offer and attractiveness of a potential business park scheme. Council would need to ensure that the employment elements (the less financially attractive elements) are actually delivered rather than just the housing. This can be achieved through planning conditions outlined upon, such as having an agreed number of dwellings constructed that would trigger the development of the employment uses.
Low Level Public Support Practical Advice	Public sector support does not always mean large scale investment. Sometimes a landowner may simply be unaware of the full potential of their site, level of market demand or how site constraints can be overcome. An increasingly common approach is for local authorities to assume some of the initial research costs, producing for example a planning brief or masterplan to show the owner/developer what is possible and prompt development. Support on site and area marketing may also be welcome.
Medium Level Public Support De-Risking Development	The public sector could go further to “de-risk” commercial development through, for example, direct delivery of infrastructure and/or site improvement work. This could include environmental mitigation, enhanced drainage and/or on and off-site highway improvements which could otherwise impinge on the development viability. Pro-active support may also be required to ensure strategic infrastructure and services are available including energy and waste treatment.

Mechanism	Description
Planning support & Local Development Orders	Greater use of Local Development Orders (LDO's) is commonly seen as a way of unlocking development potential and resolving potential planning risks/barriers. By advancing planning consent in this way, it can help speed up development delivery process in response to investor/occupier demand. However, as seen with the recently lapsed LDO at Egmere, the implementation of such measures will not automatically trigger development.
Public Sector Land Acquisition	In this approach the public sector takes the lead in acquiring employment land, taking a more proactive approach to development delivery either as direct provider or in partnership with others. Once the land is acquired, the public sector has direct control over the roll out of the land and choose to develop themselves, enter into a partnership arrangement or sell on the site with conditions that it is developed.
Joint Venture Agreement	<p>A defined agreement between public sector agencies and private developer partners. This is most commonly used where land is, at least in part, owned by the public sector. The public sector can then support development by inputting the land at low or nil value or by seeking out infrastructure funding. Such a Joint Venture partnership can take a number of forms:</p> <ul style="list-style-type: none"> • Contractual Partnership – Normally a short-term arrangement where the parties enter into a contractual arrangement where one party, usually the developer, will deliver. It would relate to the most straightforward developments. • Joint Venture through formation of a limited company formed through share issue - A common arrangement where each party will put in an element of cost and risk, and the return reflects the share. The council may put in land and/or capital, the developer will often meet development costs. The arrangement may see proceeds distributed in different ways. This could be a revenue share, or a share on sale of the investment. The party taking the greater level of risk will normally have first call on the profit. • Company limited by guarantee – Tends to be more for non-profit making arrangements and can introduce a number of partners to the company. This arrangement is more likely to be suitable for marketing and promotion of regeneration schemes rather than a Joint Venture to deliver development.
Public Sector Support – Loans and Gap Funding	<p>A range of public sector funding options can be brought into the project to help bridge funding gaps. In recent years, Government support for development projects has been more focussed on housing schemes, to alleviate housing pressures. However, through mixed-use schemes, employment land can benefit through the delivery of enabling infrastructure. LEPs also have a role to play in delivering gap funding, through City Deals or regional programmes and provide a link between Government and the local business community</p> <p>Emerging from the Covid-19 economic shock, there may be changes to the priorities of Government funding (they may look to stimulate investment so will aggressively fund programmes, or they may look to target sectors not related to the commercial property market), which is unknown at this time.</p>
Public Sector Support – Rental Guarantee	Another direct support approach could be through rental guarantees (either in terms of minimum rental thresholds) or where a public body (Local Authority or Government agency) enter into a long-term “head-lease” arrangement with the developer to help secure funding and the public body then “sub-lets” to future business occupiers

Mechanism	Description
Long lease interest and Annuity Rent	This is also increasingly used to support investments by pension funds and other major financial institutions into developments. The institution will fund the development in exchange for a lease of circa 35 years and an annuity rent paid by a secure covenant such as the council acting as developer. This would be a low but secured rent over the time period with agreed uplifts. The developer can then sub-let at market value to obtain a profitable rent. At the end of the 35 years the property will revert to the developer for £1 and the developer retains the long-term asset value.
Public Sector direct development	Ultimately, when soft intervention schemes as set out above still fail to encourage private sector development the remaining option is for the public sector to take full responsibility for speculative property development. This means the public body takes full financial and market risk prior to securing a commercial tenant or freehold sale of the completed property. The public sector is able to secure funding at significantly competitive rates through the Public Works Loan Board (PWLB) and defer repayments over the lifetime of the completed asset (40 - 50 years potentially).

Source: BE Group, 2021

8.9 These potential delivery mechanisms are options that could be enacted for the shortlisted sites within this Delivery Strategy.

Site Specific Strategies

8.10 The following provides information for the delivery of the priority sites. For each site, a Strengths, Weaknesses, Opportunities and Threats (SWOT) analysis is presented on a commercial development of the site. From this a description of the preferred development is presented, including likely size ranges, unit types, core uses, timing and market positioning. An Action Plan is presented that would help guide the roll-out of the sites, in particular outlining NNDC's potential actions. The viability of each site is discussed, with headline construction and development costs provided, as well as a discussion of potential income levels that could be achieved.

8.11 As identified in the previous chapter, the sites are:

Table 24 – Shortlisted Sites

Settlement	Employment Sites
North Walsham	EMP18 Cromer Rd IE NW62 North Walsham Western Extension
Holt	EMP10/1 Heath Dr IE H27/1 Land at Heath Farm
Fakenham	EMP24 West of Thorpland Rd
Melton Constable	EMP14 Melton Constable IE
Fakenham – further growth	Fakenham Football Club Land to the south of Fakenham Football Club
Catfield	Catfield Industrial Estate

Source: BE Group, 2021

North Walsham

8.12 This site is to the north of Cromer Road and comprises some existing employment uses within EMP18, which also has some 2.55 ha of vacant land. The North Walsham Western Extension allocation includes land adjacent to EMP18, including adjacent to existing employment uses. Therefore, it is reasonable to expect that the bulk (or all) of the planned employment within this mixed-use area (7 ha) would be provided in this location.

8.13 The SWOT for this area is provided in the table below:

Table 25 – SWOT Analysis, North Walsham

Strengths	Weaknesses
<ul style="list-style-type: none"> • Existing employment node with key local businesses • Supermarket within EMP18 which would provide services for growing worker population • Some key sites are in ownerships of developers • Large, moderately flat site • Good position and prominence at a gateway location to North Walsham • Some existing infrastructure in place 	<ul style="list-style-type: none"> • Localised market • Considerable development costs to fully realise site potential • Difficulties in addressing surface water drainage
Opportunities	Threats
<ul style="list-style-type: none"> • Western Extension area has policy support in place for 7 ha of employment land • Consortium of landholders has been established for the Western Extension area • Lack of available premises in North Walsham means there is unmet demand in the area • Specific respondents to this study have indicated a desire for new premises in North Walsham • Western Extension scheme provides opportunity to fund infrastructure required for the site • Opportunity for a broad range of unit sizes on site, including potentially satisfying larger requirements • Could link with Lyngate Rd Industrial Estate to the north through extending link road, thereby creating a broader employment corridor and opening up a longer term employment opportunity in land between the two nodes 	<ul style="list-style-type: none"> • Priority of consortium for Western Extension area is likely to be the residential components to the south of Cromer Rd • Partially demolished warehouse on site represents additional cost for full redevelopment • Economic downturn impacting on property market • Differing priorities of landholders, including interest in residential and car home schemes • Viability issues likely, particularly to fund rail crossings

Source: BE Group, 2021

- 8.14 This site represents a strong development opportunity, though its complexity in terms of land ownerships and the broader Western Extension project mean that delays are a real risk. The development of the remaining vacant land within EMP18 should be a short-term prospect, though the viability of a development scheme is a concern. Subsequent stages would be the Western Extension land north of Cromer Road, which is in several ownerships, as seen in the ownership mapping in Figure 15 later in this chapter. Some of this land is in the control of Wall Engineering, an existing business that has some underutilised land with potential for more intensive uses.
- 8.15 From this opportunities analysis and review of the market for this site, the following development parameters have been established.

Table 26 – Development Parameters for North Walsham Site

Parameter	Details
Developable Land Area	9.55 ha
Total Floorspace Yield	30,000-35,000 sqm
Use Types	Offices, B2, B8
Unit Size Ranges	Offices: 50-500 sqm B2: 250-4,000 sqm B8: 1,000-4,000 sqm
Market Opportunity	<p>This site has the opportunity to be a leading employment node for North Norfolk. It is noted that there is a proposal for a builder's merchant operator at the site of the former Magic Kingdom building (partially demolished building). This would be an acceptable outcome for this site.</p> <p>Further land with frontage to Cromer Rd, adjacent to the Victory Housing Trust building (Citygate Developments land) could be developed as further office uses as a small office park. From a market perspective, it would be preferable for this office space to be developed speculatively and available as leasehold to the market, with tenants able to take part or all of the building(s). However, Citygate are not looking to bring forward further office space, with significantly viability constraints, and would prefer higher value uses on the site.</p> <p>Further north, including underused Walls Engineering land, would be opportunities for a mix of B2 and B8 uses. This site should predominantly look to provide mid sized units, rather than the small end of the market, recognising the rare land opportunity in North Walsham. However, it is recognised that there will be a continued demand for smaller units and thus some provision for these should be made.</p> <p>In longer term and outside the employment allocations, there would be further opportunities for land consumptive uses further north, which would require the link road to connect with Lyngate Rd Industrial Estate in order to be opened up.</p>
Market Positioning	The market position for any office space would be very price sensitive. There would be a need to position it at a lower price point than being achieved in Norwich. However, as new build and good quality units they would need to be positioned to

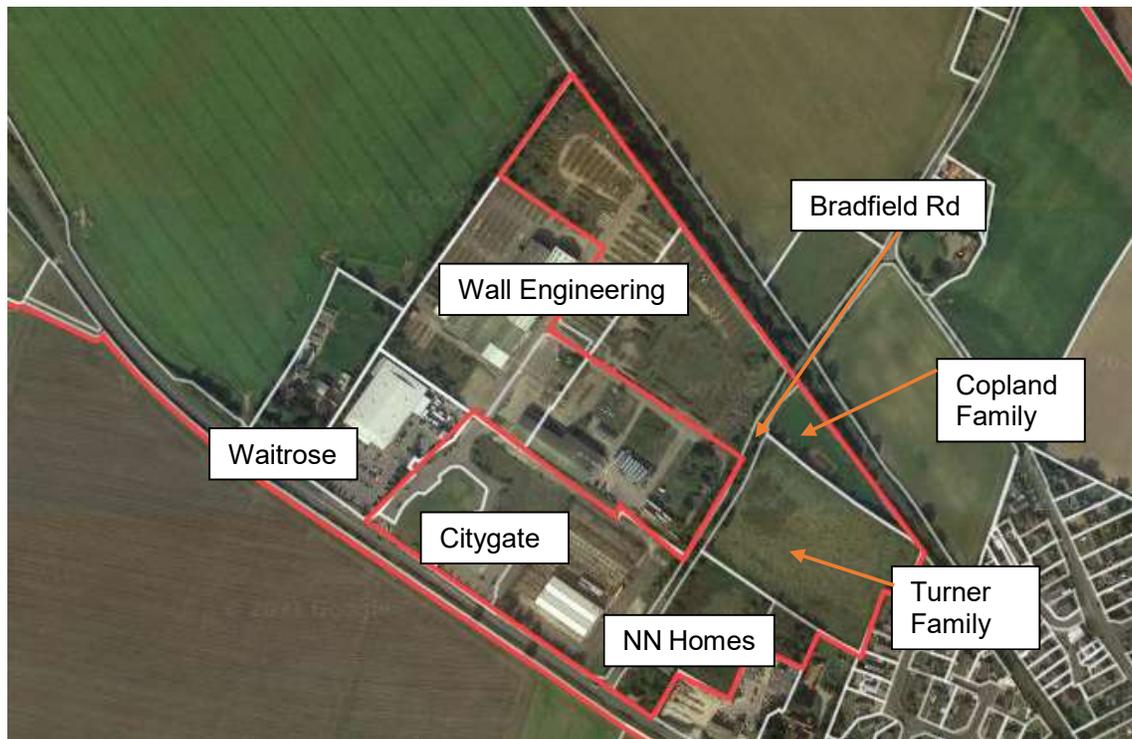
Parameter	Details
	cover costs. With Norwich business park units achieving £14-16.5/sqft, there is a significant risk that the achievable prices on this site would not be sufficient to cover development costs. The industrial units would be a mid market, though as rare new build in North Walsham they should be able to achieve above average levels at low £5/sqft
Phasing	The EMP18 land is currently being marketed and would be considered a short-term opportunity (although has moved slowly). The developer should be encouraged to advance this site and expand potential development types. The Western Extension employment area would be a medium term opportunity. Its timing would be connected to improvement to the road access.

Source: BE Group, 2021

Land Ownerships

- 8.16 The employment allocation for this is in several ownerships, including developer, business and private ownerships. This is illustrated in Figure 15 below.

Figure 15 – Land Ownerships of North Walsham Employment Site



Source: LandInsight, 2021

Red boundary illustrates Employment allocation

- 8.17 As such, there is merit in addressing areas separately, including Wall Engineering site (under-utilised land), Citygate Developments land and land to the east of Bradfield

Road.

Access Assessment

- 8.18 This summary considers access to Employment land North of Cromer Road where there is potential for development to be linked to the wider western extension development. This could include a mix of office, B2 and B8 uses and could include a mix of sizes up to 30-40,000 sqft. This land lies between the A149 and the North Walsham to Cromer Railway, which is single track unelectrified in this section.
- 8.19 There is further potential for land north of the railway around the Cornish Way industrial estate that could link to this opportunity if a successful option for a road across the railway can be created. Cornish Way is where the significant majority of employment land in the town and therefore this part of the district, mainly B2 in nature, is located.
- 8.20 A challenge with expansion of Cornish Way is that it lies to the north side of the town, whereas strategic movement is mostly focussed south and west. Heavy goods vehicles accessing and egressing it therefore use the A149, which effectively severs the town in two, reducing its attractiveness and restricting growth.
- 8.21 WSP have therefore considered these employment sites in a wider context taking into account that a key driver in providing employment in North Walsham should be to enhance the town itself by creating a more suitable and less intrusive access to existing employment sites and working with the potential residential led western extension.
- 8.22 Appendix 5 (Figure A1) demonstrates this strategic opportunity with a combined gateway junction into site Emp18 and to link to the western extension. The point of this is to both reduce numbers of junctions on the A149 Cromer Road itself and create a key and clear gateway to North Walsham as a place from the North. Such a route would initially open up sites around the A149, but as shown on that plan has the capability with simple structure to continue north to cross the railway and access sites around Cornish Way Industrial Area to the north, giving the potential to open more industrial land in an established and therefore un-intrusive industrial extension. If pre-planned the infrastructure can be created by using economies of scale afforded by planning this area as a whole, yet still deliver in a phased manner.
- 8.23 Coming south of the A149 the western extension provides the opportunity to link round

to the B1150 North Walsham Road, which ultimately forms a link to and from Norwich. This in itself has the potential to reduce impact of through vehicles on the town centre itself, including those from the Cornish Way industrial estate, allowing town and station to be regenerated and upgraded from a public realm perspective, able to better service the increased population and activity generated by housing and employment growth.

- 8.24 The 2.1km link from A149 to the B1150 is shown nominally through the potential housing extension land and can be used to open up plots. This could additionally be furnished with appropriate cycle and pedestrian amenities to create new links, while being landscaped to ensure that new housing works with its strategic purpose too.
- 8.25 At this stage we have nominally shown several junctions on route to demonstrate links to radial routes of different scales and make sure that such a route has the dual purpose of strategic alternative to town centre routes and servicing local plots and areas.
- 8.26 At the south eastern end of the route WSP demonstrate how that route could be continued from B1150 to A149 to form a complete strategic route around North Walsham, allowing the Great Yarmouth to Cromer Road to avoid interaction with the town centre. A critical challenge here is that the A149 and railway are in extremely close proximity to each other and therefore there is a need to cross and turn back to create the link. Opportunities to open up land for development around this location may also be available or need to be created to develop such an addition for the benefit of the town.
- 8.27 The Railway to the south of North Walsham is single track, with the A149 being wide single carriageway. The road alignment shown through the Western Development is all within the red line boundaries shown, or highway land and therefore deliverable by opening up such development land.
- 8.28 Appendix 5 Figures A2 and A3 show how different parcels of land could be released by this with appropriate hectarages and how the land ownerships associate with this land.
- 8.29 In summary opening up this employment site should be considered in the much bigger phased strategic manner shown above, since it has the potential to provide significant

benefit to the whole town, as opposed to act as relatively piecemeal development adding impact challenges to the town centre.

Delivery Options

8.30 The following table provides an outline of the potential delivery options for the employment land at this North Walsham site. It is developed from the viewpoint of what North Norfolk District Council could provide as input/assistance to drive the development of employment uses on site, which may be low-level support to an active developer role.

Table 27 – Delivery Options

Delivery Mechanism	Comments
Leave to the market	NNDC may choose to have no input, other than as the planning authority and providing its usual business support and advice. The broader Western Extension area is being planned for by the landholder consortium. Specifically for the employment land, part of this is in the control of a developer. Therefore, there is impetus and expertise in the land ownership that could deliver the scheme. However, a hands-off approach means that NNDC does not have significant influence over the timing, direction and scale of the scheme. In particular, there is a risk that the Western Extension focus will be on housing as a priority.
Light Touch	Development of a planning brief or masterplan (building on this study) to demonstrate the opportunities for employment within the site. NNDC could look to further streamline the planning process through an LDO or similar.
Commit to head lease	NNDC could commit to taking the head lease of an office building on site (likely within the EMP18 land) to kickstart development. The commitment of a lease would de-risk the development from the landholder’s perspective, with NNDC taking on the risk of it not being occupied. NNDC could then occupy part or all of the building if required, or more likely, sublease to private sector occupiers. This would essentially deliver a spec-build office unit to the market, with the aim to act as a catalyst for further development. However, it is noted that this option would not be commercially viable. NNDC involvement would be due to the market failure delivering offices in this location and it would need to be recognised that Council investing in this development would not see a commercial return.
Land acquisition	NNDC could acquire part or all of the employment land and bring to the market itself, either through a development partnership with a private developer or act as developer itself. NNDC would be taking on the development risk and viability constraints. It could have a larger influence on the end product and develop several buildings and unit types.

Source: BE Group, 2021

Constraints to Development

8.31 Identified constraints to development on this North Walsham employment site are:

- Multiple ownerships
- Some demolition required on part of site (e.g. Citygate Developments land), though there is a proposal for a builder's merchant on part of this site
- Under-utilised land in ownership of Wall Engineering
- Access required to open up sites currently without direct highways frontage (or only via narrow Bradfield Road)
- Interest of some parties for uses other than employment uses (e.g. residential, care home)
- Need to retrofit new build premises and supporting infrastructure around existing units
- Rail line to the north of the site, providing a barrier to linking with industrial areas to the north-east

Concept Plans

8.32 Appendix 6, Figure A4 provides an illustration of the potential consolidation and more efficient use of Wall Engineering land within the EMP18 site for employment units. This includes extending the access to plots in the north of the site and introducing B2/B8 units on under-utilised land.

8.33 This concept plan shows the potential for the first phase roll out of employment units at this site, providing a logical expansion phase to existing employment uses and taking advantage of the current access point from Cromer Road.

Viability Assessment

8.34 Headline construction costs have been estimated for the units outlined in the concept plan, as well as access roads and an allowance for infrastructure delivery. These costs provide an indication of the potential scale of costs that a landholder would need to address in order to deliver units on site as illustrated in the concept plan. However, actual costs would be dependent on the final layout plan for the units, developer preferences, types of uses brought forward, abnormal costs identified through detailed site surveys and the quality of buildings constructed.

- 8.35 Construction costs for mid-market industrial buildings appropriate for manufacturing and warehousing uses are likely to be in the order of £1,000-1,100/sqm. On a scheme of about 15,000 sqm this results in a construction cost of about £15-17 million. Allowing for infrastructure and service road costs, as well as fees and financing, it is likely that the scheme would be about £20-22 million.
- 8.36 Potential income streams from the units have also been estimated, based upon information gathered during the property market assessment of this study, including data on past lease price points as well as conversations with commercial agents. The potential income streams assume a typical occupier and standard of construction. Prime rents for the Norfolk/Suffolk region are achieving £7.50/sqft and good quality secondary stock is achieving £5.75/sqft. Industrial stock in North Norfolk is typically achieving £5-5.50/sqft. For new build stock at this location, it is assumed that smaller units would achieve about £6.50/sqft and larger units £5.75/sqft.
- 8.37 Prime investment yields for industrial schemes in Norfolk/Suffolk are reported as being at 5.25% in the second half of 2020 (Bidwells Market Databook). A scheme in this location would not be considered a prime location for the region, and thus BE Group has assumed a slightly softer yield of 5.75% for this scheme. At this yield and for the income streams assumed above, the capital value of the built development would be about £18-19 million, significantly less than the overall development cost of the project.
- 8.38 Therefore, there appears to be a significant funding shortfall in this development, which would mean that the project is not attractive to the developer market without some means of address this shortfall.

Recommended Approach for NNDC

- 8.39 As there are considerable concerns as to the potential viability of an open market development at this site, it is appropriate that means of bringing the site to the market are explored, in particular public support. Of the delivery options discussed above, it is not recommended that NNDC leave to the open market, given the constraints on the site, the need for further employment land in North Walsham in the short term and the questionable viability of any scheme if developed for the open market. The following commentary discusses the recommended approach for this site, divided into the three main areas.

- 8.40 For the under-utilised **Wall Engineering** land, it is recommended that this is taken forward as a first stage of the development of this site. It is recommended that a dialogue is established with Wall Engineering, looking to encourage the firm to consolidate its operations within its site and make land available for development of B2/B8 units. A development brief could be provided to Wall Engineering that would identify potential development opportunities for its land and outlines the market demand for B2/B8 units in North Walsham, including active requirements.
- 8.41 NNDC support for this portion of the site should, in the immediate term, be in encouraging Wall Engineering to consider options for the consolidation and development of their site. If such an approach is supported by Wall Engineering, NNDC can look to implement more active support by helping to facilitate funding for enabling infrastructure, including access road, to help unlock the north land areas. This could be as part of a funding programme for town or district-wide improvements, or directly through NNDC expenditure.
- 8.42 The **Citygate Developments** site should continue to be supported for a mix of office and smaller B2/B8 units. The builder's merchant proposal would be a compatible use, if not ideal. Other development options should continue to be resisted as it forms a key land parcel in forming a consolidated employment node at this location. Demolition and site preparation works would need to be undertaken on part of the site in order for it to be developed for new uses (builder's merchant). NNDC could look to help bring in funding to undertake the site preparation works, including looking to bring in LEP support as a means of making this site more attractive for employment uses, though only if private sector development is not forthcoming.
- 8.43 A good employment outcome for this land would be a mix of good quality office units and some smaller B2/B8 workshops or units. The site is a high profile location, with frontage on Cromer Road and thus should comprise high quality units that promote North Walsham as a key employment location. NNDC can help facilitate this by taking an active stake in the development. One potential solution for this could be that NNDC enters into an agreement with Citygate Developments to take the head lease of an office building at this location, in order to facilitate its development. By committing to a head lease (e.g. +10 years) of an office building it provides security for the developer,

which in turn will help it secure finance. NNDC could occupy the office itself, or sublease to the market (which is more likely), which would provide new-build office premises to the North Walsham market. The objectives of such an action by NNDC would be to provide further units in the market and to spur development elsewhere within this node, by acting as a catalyst to development. The goal for this site would be for other units to come forward without public sector intervention. However, it is recognised that this would not be an economic option for Council, rather it would be to overcome market failure.

- 8.44 The **land to the east of Bradfield Road** is likely to be a longer-term option for development at this node. This area would require improved access such as upgrading Bradfield Road. This may be achieved as part of the broader link road improvements discussed in the Access section above. It is not recommended that NNDC commit to an active role in the delivery of this site for employment uses at this stage. However, it should continue to examine options for road links between Cromer Road and Lyngate Road industrial estate. This site should be safeguarded for employment in the longer-term, as the final stage of devilment of this employment node.

Action Plan

- 8.45 The table below provides an overview of the Action Plan for the North Walsham site.

Table 28 – Action Plan and Next Steps

Action	Lead Entity	Timing
Wall Engineering Site		
• NNDC engagement with Wall Engineering to discuss appetite for consolidation of its uses and development of under-utilised land	NNDC, WE	Immediate
• Preparation of development brief outlining market potential for the site and current requirements	NNDC	Short term
• Detailed site survey to identify constraints and inform cost assessment	WE	Short term
• Masterplan for Wall Engineering land	WE	Short term
• Costing of infrastructure and access requirements and exploration of funding options	WE, NNDC	Medium term
• Preparation and delivery of planning application	WE	Medium term
• Construction and delivery of units	WE, developer	Medium term
Citygate Developments Site		
• NNDC engagement with Citygate to encourage bringing forward remainder of site for employment uses	NNDC, CD	Short term
• Encourage development of further employment uses around proposed builder's merchant use	NNDC, CD	Short term
• NNDC to determine whether to commit to head lease on office building within Citygate site.	NNDC, CD	Medium term
Site to the East of Bradfield Road		
• NNDC engagement with landholders to encourage bringing forward for employment uses	NNDC, landholders	Medium term
• NNDC to explore access options	NNDC	Medium term
• NNDC to safeguard site for longer-term development	NNDC	Medium term
• Development of site for employment uses	Landholders	Long term

Source: BE Group, 2021

Fakenham – EMP24

8.46 Fakenham is a key employment node for North Norfolk, including for mid and larger operators. Several national brands are located within Fakenham and occupying B-class floorspace. Fakenham has very low vacancy levels within its employment areas, particularly for industrial and warehousing units. Some occupiers have expressed capacity constraints and are seeking alternative premises.

8.47 EMP24 is a large, mostly vacant site with excellent prominence on the A148 at the entrance to Fakenham. The site is alongside existing employment uses, including B-class uses as well as retail, medical and community uses. This site is in multiple ownerships. This site represents the only vacant employment site of significance in Fakenham, with other available land being smaller, in-fill parcels.

8.48 The following Table 29 is the SWOT analysis of employment uses on EMP24.

Table 29 – SWOT Analysis, Fakenham, EMP24

Strengths	Weaknesses
<ul style="list-style-type: none"> • Large, flat site • Excellent prominence and positioning on A148 • Adjacent to existing employment area, which has a road spur to connect to the site • Close to range of existing services that could be utilised by the workforce • Western North Norfolk site, thereby having improved links with central England 	<ul style="list-style-type: none"> • Triangular site suggests that some land will be underutilised • Multiple ownerships • Significant infrastructure required to develop site
Opportunities	Threats
<ul style="list-style-type: none"> • Low vacancy rates in existing employment nodes in Fakenham, suggesting strong need for further employment units • Demand for a wide range of unit sizes for industrial and warehousing uses • Some businesses in Fakenham are in premises that are impacted by narrow access points and capacity constraints. There would be an opportunity to attract existing Fakenham businesses to this site. • Opportunity to be the leading business/ industrial park in the west of North Norfolk • Development of site to the west, including potential to use link road to improve access to the subject site 	<ul style="list-style-type: none"> • Economic downturn impacting on property market • Pressures to develop land for residential dwellings • Viability constraints on development • Different owners having different visions and priorities for the site • Part or full site being lost to retail park or leisure uses as an expansion of the uses around Morrison's supermarket

Source: BE Group

8.49 This site is a strong opportunity for employment uses, and critically represents the main opportunity for employment growth in Fakenham within allocated sites. Given the lack of alternatives at present, and the need for further sites in the near term, it is considered that Council should take an active role in trying to advance this site.

8.50 The development opportunity for the site is for a significant range of unit sizes, predominantly industrial and warehousing, but with office elements as well. The site has the opportunity to be developed as the leading business or industrial park in the west of North Norfolk, providing a high-profile location with high-quality premises.

8.51 From this opportunities analysis, BE Group provides the following development parameters for EMP24.

Table 30 – Development Parameters for Fakenham EMP24

Parameter	Details
Developable Land Area	6.11 ha
Total Floorspace Yield	22,000-24,000 sqm
Use Types	offices, B2, B8
Unit Size Ranges	Offices: 50-500 sqm B2: 250-5,000 sqm B8: 1,000-5,000 sqm
Market Opportunity	This site has the opportunity to be a leading employment node for North Norfolk, taking advantage of its strategic location. Development of the site should provide for large plots to allow for significant unit sizes. The most attractive and valuable land parcels would be at the north, with frontage to the A148. This land is also the widest part of the site, which narrows substantially to the south. High profile B2 and B8 occupiers are likely to prefer the northern areas and could attract could values. Smaller mix of B1, B2 and B8 units would take the mid and southern areas of the site.
Market Positioning	The market position for the units would be as high-quality industrial, warehousing, office and hybrid spaces. There is an opportunity for a bold and exemplar project within Fakenham in this key location.
Phasing	There is a short term need to roll out development of this site, with mid to larger units as part of that initial mix. The timing would be more influenced by landholder intent and development of enabling infrastructure

Source: BE Group

Land Ownerships

8.52 The land ownerships of EMP24 are illustrated in Figure 16 below.

Figure 16 – Land Ownerships of EMP24, Fakenham



Source: LandInsight, 2021

- 8.53 Magnus Whyte Property Investments is a local development firm. Trinity College has considerable landholdings in the area, including to the west of the site and to the south of the Fakenham Football Club.

Delivery Options

- 8.54 The primary objective when considering delivery options for this site would be the need to provide on the ground results in the near term. North Norfolk District Council's role should be to look to drive activity on this site quickly.

Table 31 – Delivery Options

Delivery Mechanism	Comments
Leave to the market	NNDC may choose to have no input, other than as the planning authority and providing its usual business support and advice. However, given the multiple ownerships on the site, the fact that it has not proceeded as yet, having an institutional landholder (which can potentially land-bank for many years) and the need for further premises in Fakenham in the near term, it is strongly considered that a laissez faire approach will not be beneficial for this site.
Light Touch	Development of a planning brief or masterplan (building on this study) to demonstrate the opportunities for employment within the site. NNDC can also have a critical role in bringing the landholders together into an active development partnership and introducing them to the businesses looking for space in Fakenham.
Develop enabling infrastructure	NNDC, with NCC and the LEP, can spur development by committing to enabling infrastructure to open up the site, most notably securing access from the A148.
Land acquisition	NNDC could acquire part of the site and enter into a joint venture with other landholders to develop the site.

Source: BE Group, 2021

Constraints to Development

8.55 The following list the key development constraints in relation to this site.

- Multiple ownerships
- Triangular site limiting development opportunities in south of site
- Access would need to be secured, either from the north, east or west

Concept Plans

8.56 Appendix 6, Figure A5 provides an illustration of a potential layout for this site, incorporating access from the east, past Morrisons supermarket. This concept plan envisages larger units to the north of the site, with medium and smaller units to the mid and south of the site.

Viability Assessment

8.57 Headline construction costs have been estimated for the units outlined in the concept plan, as well as access roads and an allowance for infrastructure delivery. These costs provide an indication of the potential scale of costs that a landholder would need to address in order to deliver units on site as illustrated in the concept plan.

8.58 On a scheme of about 21,000 sqm this results in a construction cost of about £16-18 million. Allowing for infrastructure and service road costs, as well as fees and financing,

it is likely that the scheme would be about £22-24 million.

8.59 Potential income streams from the units have also been estimated, based upon information gathered during the property market assessment of this study, including data on past lease price points as well as conversations with commercial agents. For new build stock at this location, it is assumed that smaller units would achieve about £6.50/sqft and larger units £5.75/sqft.

8.60 BE Group has assumed a yield of 5.75% for this scheme. At this yield and for the income streams assumed above, the capital value of the built development would be about £24-25 million, which suggests a viable project assuming no significant abnormal costs.

Recommended Approach for NNDC

8.61 The overall objective for this site should be to deliver employment units within a short timeframe, to help alleviate the market pressures in Fakenham. Therefore, it is recommended that NNDC has an active role in the site's delivery to help facilitate this objective.

8.62 NNDC should look to bring the landholders together in the immediate term to encourage collaboration for an integrated employment development. The Urban Extension approval to the west of the site provides an opportunity to stimulate interest in this site. Development of the subject site should be for a range of employment uses (B2/B8 and offices) and NNDC should resist proposals that promote alternative uses. It should be promoted as a means of providing job opportunities for the wider area, including growing residential population, and thus is complementary to the proposal to the west.

8.63 However, there is urgency for further employment premises to become available in Fakenham even without the neighbouring development, and thus NNDC should look to engage the landholders in the immediate term to start to build momentum for the development of employment at this location. NNDC should look to collaborate with the landholders in developing a masterplan for the site that would outline development outcomes, phasing, uses and layout of employment on the site.

- 8.64 NNDC should strongly consider taking an active role in the development of the site. While this could be through acquisition of part or all of the site, it is not recommended that this is the first preference for NNDC. Rather, it is recommended that NNDC commissions the development of a small number of units on part of the site in order to stimulate development and de-risk the project.
- 8.65 Smaller industrial units (e.g. <500 sqm) are in demand in Fakenham and elsewhere in North Norfolk, though there is very limited appetite for the speculative development of such units. Occupiers of units of this scale generally do not have the capacity to commission new build units and thus there can be market failure for this section of the market. By commissioning the development of smaller industrial units, NNDC can address this market failure and stimulate the development of the site. It is recommended that NNDC maintains ownership of these units and leases them to the market.
- 8.66 Larger units are more likely to be developed without NNDC intervention, with occupiers having more capacity to commission the development of such units. Therefore, it is not recommended that NNDC take an active role in the development of larger units at this site.
- 8.67 NNDC should also help facilitate the funding of enabling infrastructure, including access and utilities. This should be through a combination of securing regional (LEP, NCC) funding, government grants and NNDC inputs.

Action Plan

- 8.68 The table below provides an overview of the Action Plan for the EMP24 site.

Table 32 – Action Plan

Action	Lead Entity	Timing
<ul style="list-style-type: none"> • NNDC engagement with landholders to discuss appetite for employment land development 	NNDC, Landholders	Immediate
<ul style="list-style-type: none"> • NNDC to provide evidence of need and market for units in Fakenham, including joint discussions with potential occupiers and landholders 	NNDC, Landholders	Immediate
<ul style="list-style-type: none"> • Development of masterplan for the site 	NNDC, Landholders	Short term
<ul style="list-style-type: none"> • Detailed site survey to identify constraints and inform cost assessment 	Landholders	Short term
<ul style="list-style-type: none"> • Detailed cost assessment 	Landholders	Short term
<ul style="list-style-type: none"> • NNDC to commission development of small industrial unit scheme 	NNDC	Short/medium term
<ul style="list-style-type: none"> • Preparation and delivery of planning application 	NNDC, Landholders	Medium term
<ul style="list-style-type: none"> • Construction and delivery 	Landholders	Medium/long term
<ul style="list-style-type: none"> • NNDC to take industrial units to market 	NNDC	Medium term

Source: BE Group, 2021

Fakenham – Alternative Option

8.69 The EMP24 site discussed above is the only large employment site for growth in Fakenham. Given the need for further premises in the town, it was considered prudent to explore an alternative should the EMP24 site not be delivered in a timely manner for the local market.

8.70 Two alternative sites have been considered as part of this study – the **Fakenham Football Club site** and the **agricultural field to the south of the Fakenham Football Club**. Both of these sites are of sufficient scale to support a range of employment uses and are in prominent locations near to a key entry-point of Fakenham and the A148. The Football Club site has more prominence being at the intersection of the A148 and the A1067, though the development of this site would require the relocation of the Club and its facilities. The site to the south is a larger site outside of the Development Boundary of Fakenham and has limited obvious constraints to development, other than being outside the Development Boundary.

8.71 On balance, and considering the potential need for an alternative site to become available relatively quickly, it has been determined that the agricultural site represents

the better alternative employment site for further investigation. This site is 10.54 ha and is relatively regular in shape. It would be relatively straightforward to develop and would not require the relocation of the Football Club, which could significantly delay development.

Land Ownership

- 8.72 The site is in the single ownership of Trinity College, forming part of a wider parcel of land under their control, which extends further east.

Figure 17 – Fakenham, Alternative Employment Site



Source: LandInsight, 2021

Delivery Options

- 8.73 This site has the potential to be a like-for-like alternative to the EMP24 site, with largely the same attributes, opportunities and market potential. At 10.54 ha it is larger than the 6.11 ha EMP24 and with a more regular shape the potential total yield of employment floorspace will be higher, at about 36,000-42,000 sqm. The development of this site would still look to meet the same market need and have the opportunity to position as a high-quality employment node with a mix of industrial, warehousing, office and hybrid spaces.

8.74 The table below explores the delivery options to bring forward the alternative site for employment uses.

Table 33 – Delivery Options for Fakenham Alternative Site

Delivery Mechanism	Comments
Light touch	NNDC may choose to have input limited to progressing the planning support for the site, either through allocating the site for employment or through supporting a planning application. NNDC should engage with the landholder to demonstrate the employment opportunities for this site. The Development Boundary of Fakenham may need to be adjusted in the emerging Local Plan..
Joint Venture	Trinity College retains involvement during the development phase by entering into a joint venture arrangement with a developer.
Direct sale of land to developer	Trinity College could put the site up for sale. For this to be initiated to deliver an employment outcome for the site, the planning and policy intent would need to already be in place for employment.
NNDC Land acquisition	NNDC could acquire the site, either through market purchase or compulsory purchase, with the intent to develop the site itself or enter into a joint venture with other developers to develop the site. Once again, the ultimate intent of the acquisition for employment would need to be established and public.

Source: BE Group, 2021

8.75 North Norfolk District Council would need to change the policy and planning status of the site to enable the development for employment uses. Before a developer would become involved, they would need to see some certainty as to the policy intent to change to employment uses on site.

Constraints to Development

8.76 The main constraint to development of this site is its lack of planning support, in particular that it is outside of the Development Boundary of Fakenham. Council should look to amend this in the emerging Local Plan.

Concept Plans

8.77 Appendix 6 Figure A6 provides a potential layout for the development of the site, showing internal roads and access point. A range of unit sizes could be accommodated on the site and it is envisaged that while it would be predominantly a B2/B8 scheme, there would be opportunities for offices and hybrid units within the site.

Viability Assessment

- 8.78 The headline construction costs are based on mid-market industrial buildings appropriate for manufacturing and warehousing uses and a total scheme of about 45,000 sqm, which results in a construction cost of about £31-33 million. Allowing for infrastructure and service road costs, as well as fees and financing, it is likely that the scheme would be about £40-42 million.
- 8.79 Based on the same potential price points and yield as for the other Fakenham site, it is estimated that the capital value of a scheme at this location could be about £50-52 million, suggesting that the scheme would be a viable project for the landholder, notwithstanding that site investigations would need to be undertaken to determine abnormal costs. The larger scheme enables a allows a more economic development.

Recommended Approach for NNDC

- 8.80 This site does not have planning support for employment uses and thus NNDC's early tasks would be in establishing that support. This would include engaging with the landholder to gauge interest and development intent for the site. Furthermore, NNDC should bring this site within the Development Boundary of Fakenham within the emerging Local Plan.
- 8.81 Once the planning support is established for employment uses on the site, NNDC should evaluate its need to provide ongoing support or intervention in the site. Ideally, with the planning support in place and no obvious development constraints inhibiting progress, the landholder would take the scheme forward themselves, with minimal support from Council. Given the headline viability analysis suggests this scheme is viable, benefiting from economies of scale, this should be a private sector led development.
- 8.82 However, if through monitoring of progress on the site, it is considered that NNDC does need to have input to catalyse development, it could assess its options at that stage. This is likely to be in a similar approach to the EMP24 site, with Council commissioning the development of a small industrial unit scheme as a means of stimulating development. However, it is far too early in the process to provide a recommendation of NNDC's further input at this stage.

Action Plan

8.83 The table below provides an overview of the Action Plan for the site.

Table 34 – Action Plan

Action	Lead Entity	Timing
• NNDC engagement with Trinity College to discuss development options for the site	NNDC, TC	Short term
• Draft and implement policy changes	NNDC	Medium term
• Public engagement and consultation process to explain changes	NNDC, TC	Medium term
• Masterplan of site	TC	Medium term
• Engagement of a developer	TC	Medium term
• Detailed site survey to identify constraints and inform cost assessment	TC	Medium term
• Detailed cost assessment	TC	Medium term
• NNDC to assess ongoing interest in the site, including potential to commission units	NNDC	Long term

Source: BE Group, 2021

Holt

8.84 The Holt sites are land to the east and west of the existing Heath Drive Industrial Estate. The land to the west (EMP10/1) has been allocated in the adopted Local Plan and is in the ownership of a developer (Bullen Properties), which also developed the existing industrial estate. This site is being marketed for pre-let interest, though it is questionable as to how much this scheme is a priority for the landholder. The land to the east is a land allocation in the First Draft Local Plan with an agricultural use (and farming landholder) at present. This agricultural landholder (North Norfolk Tomatoes) is the same as the landholder of surrounding parcels that entered into a development agreement for the mixed-use scheme on Heath Drive.

8.85 These sites have been combined as one area of assessment as they represent the sites for further employment growth in Holt. Together they have the potential to provide sufficient employment land for Holt, as well as provide overflow sites for surrounding areas with more critical supply issues (e.g. Cromer). These sites would be competing for the same market and essentially represent the short and long term solutions for employment in Holt.

8.86 The SWOT for these two sites is provided below.

Table 35 – SWOT Analysis, Holt

Strengths	Weaknesses
<ul style="list-style-type: none"> • Large greenfield sites (3.6 ha and 5.43 ha) that are moderately flat and appear to have minimal on-site constraints to development • Ownerships are a developer and a rural landholder that has previously worked with that developer • Sites are adjacent to an existing, successful node of employment • EMP10/1 has road access in place through the existing Heath Dr Industrial Estate 	<ul style="list-style-type: none"> • Existing road access to the sites along Hempstead Rd is restricted for HGVs • Alternative road access has recently been opened via Heath Dr though this also pass residential areas • Lack of prominence on the A-road network • Lack of close services for the worker population
Opportunities	Threats
<ul style="list-style-type: none"> • Mix of small B2, B8 units serving local market • Potential light industrial workshops for starter units • Office uses are likely to be ancillary to the core industrial/ warehousing function of the node • Opportunity to encourage broader masterplan of the site, including greenfield land to the north of H27/1 and EMP25, including identifying access solutions that do not impact on residential areas • Opportunity to support rural economy through manufacturing, maintenance, food processing and machining services close to rural areas • Two sites provide opportunity to develop different employment products if required, though market indicators suggest that the end products are likely to be similar • Potential requirement for unit for Kingsland Engineering • Connecting Heath Dr to A148 provides alternative access to sites and improve links eastwards (though still past residential areas) • Holt is a desirable market town and thus provides high amenity to potential workers. 	<ul style="list-style-type: none"> • Pressures to develop part or all of land for residential uses • Conflicts with nearby residential areas • Economic downturn impacting on property market • Two development fronts (east and west of existing industrial estate) that could compete rather than be complementary • Lack of housing affordability in Holt would limit opportunities to attract local staff for low to mid level occupations • Smaller units will not tend to be built by the occupiers themselves, who are more likely to lease existing premise. Therefore such units require a developer willing to build such a scheme, with the market beholden to the priorities and risk appetite of the developer. • Landholder appears reluctant to develop for employment uses in near term • Proposal for a residential care home for the western site.

Source: BE Group, 2021

8.87 These two sites, both adjacent to existing employment uses, represent opportunities for significant growth in Holt that should be sufficient over the lifetime of the First Draft

Local Plan. Both sites appear to have minimal on-site development constraints, though the western site has been allocated for employment for several years without coming forward for development. It is noted that there is interest for a residential care home for the western site, though this should be resisted given the limited availability of employment land in the District, particularly in central areas.

- 8.88 From this opportunities assessment, the following development parameters have been prepared.

Table 36 – Development Parameters for Holt Site

Parameter	Details
Developable Land Area	9.03 ha
Total Floorspace Yield	30,000-36,000 sqm
Use Types	Predominantly B2, B8 with some offices
Unit Size Ranges	Offices: <200 sqm B2: 200-500 sqm, with some plots to support 1,000-2,000 sqm if required B8: 200-500 sqm, with some plots to support 1,000-2,000 sqm if required and outdoor storage
Market Opportunity	The first opportunity for the sites is for smaller industrial/warehousing units, including light industrial workshops. This is a core market for NN in general and Holt in particular. This is generally a leasehold market, with occupiers looking for built premises, rather than land. Therefore, the development of such units requires the landholder to build speculatively or with sufficient pre-lets (which can be difficult when targeting SME occupiers). There would also be an opportunity for some larger industrial/warehousing units, up to about 2,000 sqm, though this would be a narrower, more ad hoc market. Flexibility should be incorporated into the design to take advantage of these opportunities when they arise. Starter or incubator units would be appropriate in this location, providing light industrial workshop and office premises for the market.
Market Positioning	The market position for this node, particularly in the earlier stages, will be targeting the smaller end industrial market. This market is price sensitive, though a new scheme at this location will have the market advantages of a lack of alternative supply of premises and being new build. The critical factor is that this is a leasehold market.
Phasing	The western site would be the first stage of this development, developed for a similar function to the existing industrial estate. There is a need in the short term for further units and the landholder should be encouraged to proceed in a timely manner. The eastern side would represent the longer-term development opportunity for this location, once the western site is largely built out. Monitoring of the local market would identify the likely timing of this and also whether the eastern site should come forward in order to accommodate more land consumptive uses.

Parameter	Details
	It should be noted that the full development of these 9 ha represents a substantial growth in B-class employment at Holt and may not be realised until beyond the planning horizon of 2036.

Source: BE Group, 2021

Delivery Options

- 8.89 Similarly to the North Walsham scheme, the land is partly in ownership of a developer. Therefore, the delivery options for the District Council's role at Holt are similar – ranging from a hands-off approach to an active development role.
- 8.90 There has been some market inertia in this location, with the western site not being developed despite being allocated for some time. There is reluctance on behalf of the landholder to build for employment uses without significant pre-commitments to the scheme and the landholder has been exploring alternative non-employment options. Therefore, the objective of North Norfolk District Council's role should be to catalyse the development of this site, though it is understood that Council has been looking to encourage development on the site for a number of years. By proposing an active role in the development, this could provide the most likely solution to enable development on the site.

Table 37 – Delivery Options

Delivery Mechanism	Comments
Leave to the market	NNDC may choose to have no input, other than as the planning authority and providing its usual business support and advice. The two landholders have worked together in Holt previously and could bring these sites forward. However, as noted above there has been some market inertia in this locality and there is a short term need for part of the site to be developed for units able to be leased to the market. Leaving it to the market risks this need not being met.
Light Touch	Development of a planning brief or masterplan (building on this study) to demonstrate the opportunities for employment within the site. The landholders should be encouraged to consider alternative access solutions which do not impinge upon residential areas.
Commit to head lease	NNDC could commit to taking the head lease of a small industrial scheme within the western site, in order to initiate development of the site (and to prevent the site being lost to non-employment uses). This would not require the full 3.6 ha of remaining land on this site, with a 0.5-1.0 ha scheme providing a substantial investment and impetus to the market. NNDC could then provide the industrial units to the market on a leasehold basis. NNDC may also consider committing to light industrial and office start up units, to be available on flexible, short-term lease arrangements.
Land acquisition	NNDC could acquire the western site (EMP10/1) and bring to the market itself, either through a development partnership with a private developer or act as developer itself. NNDC would be taking on the development risk and viability constraints. If the Council is looking to acquire sites for employment uses, in terms of developability and short term need for premises, the western site appears to be an attractive option.

Source: BE Group, 2021

Constraints to Development

8.91 The following list the key development constraints in relation to this site.

- Landholder reluctant to bring forward for employment uses in near term (western site) and is exploring alternative uses
- Sites are not on A148 and therefore do not have a high prominence.

Concept Plans

8.92 Appendix 6, Figure A7 (western site) and Figure A8 (eastern site) provide illustrations of potential layouts for the sites. These have been based on the development of small and mid-sized units within each site. If one occupier emerges to take a full site, clearly this layout would be inappropriate.

Viability Assessment

- 8.93 Headline construction costs have been estimated for the units outlined in the concept plans, as well as access roads and an allowance for infrastructure delivery. The construction costs for the western site are estimated to be about £8-9 million and the eastern site is estimated to have construction costs of about £18-20 million. Including contingencies, professional fees and infrastructure, total costs for the western site are estimated to be £10-11 million and £23-25 million for the eastern site.
- 8.94 Potential income streams from the units have also been estimated and are assumed to be £7.00/sqft for small workshops less than 1000 sqft, £6-6.50/sqft for the small to mid sized units. The small workshops could potentially secure higher rent levels (e.g. £8-9/sqft), though given it would be relatively untested market in Holt a more conservative figure has been applied. BE Group has assumed a yield of 6.50% for this scheme. This is higher than the assumed yields at Fakenham and North Walsham in recognition that the other towns are more likely to attract North Norfolk's prime businesses, with Holt being a secondary location (higher yields equate to lower capital values). At this yield and for the income streams assumed above, the capital value of the built development on the western side would be about £10-11 million and for the eastern site would be about £24-25 million, which suggests that both projects are marginal options at this stage. The yield could be lowered (thereby increasing value) if quality occupants are secured on favourable lease arrangements.

Recommended Approach for NNDC

- 8.95 In the first instance it is recommended that NNDC should continue to pursue an employment use on the western site, thereby resisting the proposal for alternative uses, such as a residential care home. This western site provides an opportunity to provide for the short-term employment requirements for Holt and central North Norfolk and should not be lost to other uses.
- 8.96 In order to bring development forward on the western site in a timely manner, it is recommended that NNDC look to have an active role in the development. The western site is a good location for small to mid sized units, including incubator workshops for start-up and micro-businesses. It is recommended that NNDC bring a proposal to the landholder to commit to part of the site for a Council owned, workshop-based incubator and grow-on scheme (e.g. units <100 sqm). This should comprise a first stage of the broader development of the site and the landholder should be encouraged to roll out

further units to support and expand upon the incubator scheme.

- 8.97 NNDC should enter into an agreement such that the landholder develops the incubator units, with NNDC to acquire and operate upon development. This could be through an outright sale, or through a lease arrangement if the landholder would prefer to retain ownership of the land. This can be negotiated and which approach is taken would not be critical to the ultimate development of the site; rather it is the commitment of NNDC to the units that would help to spur development.
- 8.98 The eastern site is a longer-term proposition for development. It is not recommended that NNDC commits to an active role in its development at this stage, though monitoring and review of its prospects is recommended. In the interim, it is important that the landholder is aware of its allocation in the draft Local Plan and the potential opportunities that this allocation affords. A soft approach, where NNDC highlights market opportunities for this site, including requirements in the market, is considered sufficient at this stage.
- 8.99 If in the longer-term the development of the eastern site is seen to be lagging market demand, then a more proactive approach could be employed by Council, such as a joint venture approach or site acquisition.

Action Plan

- 8.100 The table below provides an overview of the Action Plan for the Holt sites.

Table 38 – Action Plan

Action	Lead Entity	Timing
<ul style="list-style-type: none"> • NNDC engagement with landholders to discuss appetite for employment land development, particularly to spur development of western site 	NNDC, Landholders	Immediate
<ul style="list-style-type: none"> • NNDC economic development officers to provide evidence of need and market for units in Holt in near term 	NNDC	Immediate
<ul style="list-style-type: none"> • Preparation of a proposal for an incubator scheme at western site 	NNDC	Short term
<ul style="list-style-type: none"> • Negotiation with Bullen on proposed incubator scheme and development of further phases 	NNDC, Bullen	Short term
<ul style="list-style-type: none"> • Monitoring of market for eastern site, with potential to reassess NNDC involvement 	NNDC	Medium term

Source: BE Group, 2021

Melton Constable

8.101 The Melton Constable Industrial Estate (EMP14) is an existing industrial estate that is built out. However, this employment site has long-term vacant buildings that have little prospects of being re-occupied in their current format. This section looks at the potential to redevelop the key former-Structure Flex site within the estate, as illustrated below, which is part of the EMP14 allocation.

Figure 18 – Former Structure Flex Site in Melton Constable



Source: Land Insight

8.102 The following is the SWOT analysis of a redevelopment of the former-Structure Flex site for employment purposes.

Table 39 – SWOT Analysis, Melton Constable Structure Flex Site, EMP14

Strengths	Weaknesses
<ul style="list-style-type: none"> • Significant site in single ownership within the Melton Constable Industrial Estate • Serviced site • Adjacent complementary uses • Central location in North Norfolk 	<ul style="list-style-type: none"> • Existing unit is in a state of disrepair • Unit has been vacant for a considerable time, with little prospect of occupation • Long narrow unit would not be suitable for many businesses, even those looking for a building of a similar size • Additional costs associated with regeneration of site
Opportunities	Threats
<ul style="list-style-type: none"> • Comprehensive redevelopment of site including demolition of existing premises and development of new units • Alternatively, refurbishment of existing building, including subdivision of the building into smaller units • Demand for industrial units serving local demand (typically smaller units) • Opportunity to cater for unmet demand in larger centres (e.g. Cromer) • Opportunity to provide secondary units for B2 and B8 users, providing cheaper, overflow space to complement primary facilities • Opportunity for industrial based training units to provide practical, vocational training 	<ul style="list-style-type: none"> • Economic downturn impacting on property market • Viability constraints on redevelopment, particularly additional costs regarding demolition and site preparation costs • Narrow market due to small population of Melton Constable • Small immediate surrounding workforce

Source: BE Group

8.103 The opportunity for this site does not appear to be as the existing single, large unit, with few operators in the market requiring such a size and the long, narrow shape of the unit further limiting its attraction to the market. Therefore, a redevelopment of the site appears to be necessary to have the site occupied. A non-employment type reuse of the site is similarly not likely, given the adjacent industrial premises within the Melton Constable Industrial Estate.

8.104 The opportunity for the site appears to be as a comprehensive regeneration of the site into smaller industrial and warehousing units. Even redeveloped, these units are unlikely to be market leaders, rather providing moderate level spaces for local businesses. However, this opportunity has significant viability constraints and is likely to require gap funding to help it being realised.

Table 40 – Development Parameters for Melton Constable Site

Parameter	Details
Developable Land Area	1.31 ha (brownfield)
Total Floorspace Yield	3,000-4,500 sqm
Use Types	Light industrial, B2, B8
Unit Size Ranges	Light Industrial: <200 sqm B2: 100-400 sqm B8:100-500 sqm, outdoor storage
Market Opportunity	The opportunity is for a mix of smaller units, comprising light industrial, industrial and warehousing uses. Demand would be generated from local businesses requiring additional or alternative spaces. The units could cater to the SME market, providing modern, inexpensive units. There is the potential to connect with the surrounding rural sector, providing storage and maintenance operations.
Market Positioning	The market position for these units would be for moderate level spaces serving SME in the local area. Therefore, this will be a price sensitive product, which will constrain the overall viability of the project.
Phasing	Units could be rolled out in phases depending on demand and take-up. The long site, with road frontage in the south and west, means that part of the site could be developed and operational, while the remainder of the site is land-banked until demand warrants further units. Overall, though this is likely to be a medium to longer term project.

Source: BE Group

Delivery Options

8.105 The site is in private ownership, though with limited appetite/capacity to comprehensively redevelop the site. North Norfolk District Council’s role could be to help to overcome the potential significant viability constraints in a redevelopment of this site.

Table 41 – Delivery Options

Delivery Mechanism	Comments
Leave to the market	NNDC may choose to have no input, other than as the planning authority and providing its usual business support and advice. However, given this site has been on the market for a considerable time without being taken up and is likely to require some active intervention to once again attract an occupier, this is not recommended.
Light Touch	Demonstration to the landholder of the potential market opportunities emerging from a redevelopment of the site. Business support advice to the landholder of project management support and expertise available to undertake a development of this site.
Funding support	NNDC can have a role in providing gap funding for the project, through being the liaison between the landholder and other public bodies (LEP, NCC, Government agencies) to secure funding or through direct assistance itself.
Joint venture with the landholder	NNDC and the landholder develop the site in partnership, with NNDC committing to taking a portion of the end product as business units to be leased out.
Land acquisition	NNDC could acquire the site to develop the site itself, either through a joint venture with a developer or as the developer.

Source: BE Group, 2021

Constraints to Development

8.106 The following list the key development constraints in relation to the Melton Constable site.

- Lack of market for the current single, long unit, therefore needing redevelopment or comprehensive refurbishment
- Building is attached to neighbouring uses
- Long, narrow site would limit redevelopment options
- Small market for employment uses and is remote from large settlements in North Norfolk
- Access to the industrial estate is past residential dwellings, potentially limiting market attractiveness.

Concept Plans

8.107 Appendix 6, Figure A9 provides an illustration of the potential layout of a redeveloped site. This comprises the similar overall building footprint but divided into smaller workshop/industrial units. A new road access point is proposed that would link to the B1354.

Viability Assessment

- 8.108 Headline construction costs have been estimated for the redevelopment of the site outlined in the concept plan, including demolition, access roads and an allowance for infrastructure delivery. The demolition and construction costs are estimated to be £4 million. This assumes a straightforward demolition and if there are abnormal costs in the demolition and disposal of materials, this would increase costs. Including contingencies, professional fees and infrastructure, total costs for the development are estimated to be about £5 million. Costs do not include acquisition costs of the unit.
- 8.109 Potential income streams from the units have also been estimated. It is noted that Melton Constable is a smaller employment market and would not attract the prime rents, even for new build/fully refurbished units. It would also not command the prime yield levels. Rent prices for the units are estimated to be £5.75-6.25/sqft. BE Group has assumed a yield of 7.0% for this scheme. Under these assumptions, the capital value of the scheme would be about £4 million, indicating that the redevelopment scheme would not be viable, without gap funding support.

Recommended Approach for NNDC

- 8.110 This is a difficult redevelopment option, unlikely to be economic without additional funding support. The funding gap is the main constraining factor limiting the redevelopment of this site. Therefore, Council will need to resolve how it can best provide assistance in overcoming that funding gap, either through securing funding or by committing to the project itself.
- 8.111 If NNDC is to intervene in this project, it would need to be on the understanding that it is to address the long-term vacant unit and to provide an improved level of units in Melton Constable, rather than for commercial returns.
- 8.112 In the foreseeable future, it is recommended that Council only provide low-level support to the landholder, including linking with potential requirements in the market and signposting to potential regional and UK level funding sources that could be accessed to help address the funding gap.

Action Plan

8.113 The table below provides an overview of the Action Plan for the Melton Constable EMP14 site.

Table 42 – Action Plan

Action	Lead Entity	Timing
<ul style="list-style-type: none"> • NNDC engagement with landholder to discuss appetite for the redevelopment of the site 	NNDC, Landholder	Short term
<ul style="list-style-type: none"> • NNDC economic development officers to provide evidence of opportunities for smaller units in Melton Constable to the landholder 	NNDC, Landholder	Short term
<ul style="list-style-type: none"> • Portfolio of funding options to be provided to landholder 	NNDC	Short term
<ul style="list-style-type: none"> • Comprehensive redevelopment plan and business case prepared by landholder 	Landholder	Medium term

Source: BE Group, 2021

Catfield Industrial Estate

8.114 Catfield Industrial Estate is an existing industrial estate to the east of the A149. The estate is in multiple ownerships, including private sector and NNDC landholdings. The largest occupier is Trend Marine, which controls several buildings in the estate, though is underutilising some floorspace. Other occupiers also include marine-based enterprises (Horning Pleasurecraft, Haines), with a significant agglomeration of uses at this site.

8.115 The development of the industrial estate has been piecemeal over many years, resulting in a poor layout of buildings and a disjointed nature to the site. Movement within the site is difficult due to the layout and the landholdings. Much of the site is built out, with only a small 0.34 ha land parcel undeveloped.

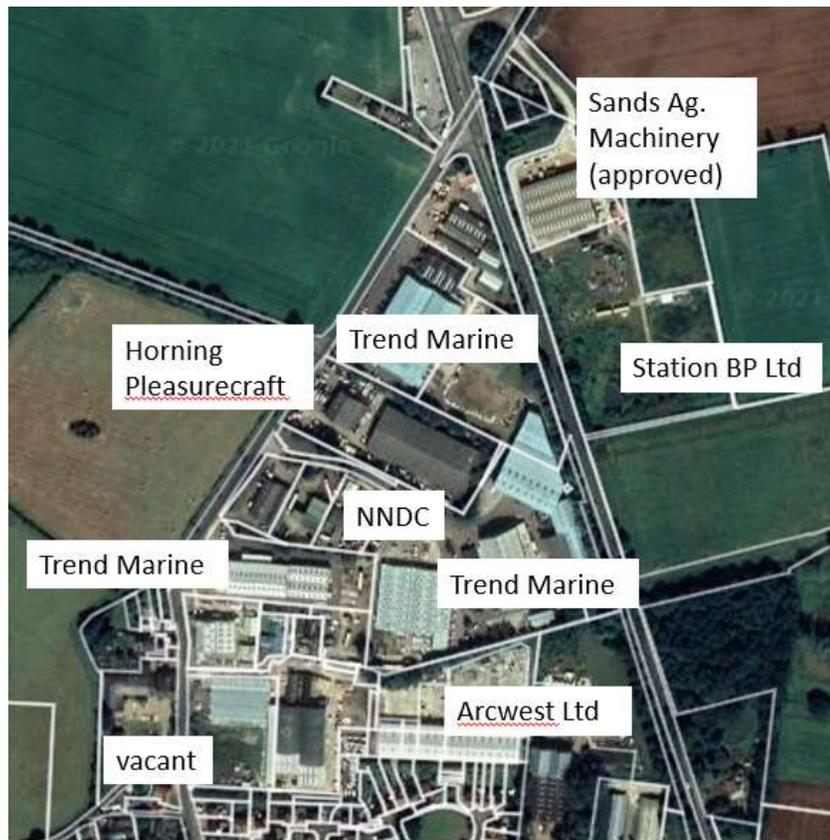
8.116 Despite these limitations, the estate is a key component of the District's economy and provides a range of employment types. Recent interest in the estate, including neighbouring areas, includes:

- Sands Agricultural Machinery has approval for a unit on the former nursery site to the east of the A149, relocating from their existing unit to the north of Stalham
- Proposal for the redevelopment of the gateway site units at the intersection of the A149 and Sutton Road.

8.117 This demonstrates that there is ongoing market appeal for this location.

8.118 The following figure illustrates the Catfield Industrial Estate, including key landholdings. It is evident from the aerial photograph and the landholding boundaries that the estate has a poor layout and has several land ownerships. It also shows its key location on the A149, which forms the eastern boundary of the estate.

Figure 19 – Catfield Industrial Estate



Source: LandInsight, 2021

8.119 The following is a SWOT analysis of the Catfield Industrial Estate.

Table 43 – SWOT Analysis, Catfield Industrial Estate

Strengths	Weaknesses
<ul style="list-style-type: none"> Established site with major operators A-road (A149) adjacent to the site Serviced site Established hub of complementary uses (marine industry) Flat site 	<ul style="list-style-type: none"> Removed from any major settlements Inefficient layout Access to industrial estate via narrow road Triangular site resulting in some land being underutilised Multiple ownerships Only one small site is undeveloped (0.34 ha) in south of site, that would require access to be developed
Opportunities	Threats
<ul style="list-style-type: none"> Comprehensive redevelopment of site including demolition of existing premises and development of new units to better utilise available space Redevelopment of entry-point for high profile, high quality employment units and potentially services for the worker population Consolidation of Trend Marine operations to enable release of some floorspace/land to the market 	<ul style="list-style-type: none"> Viability constraints on redevelopment, particularly additional costs regarding demolition and site preparation costs Narrow market due to small population of Catfield and surrounding towns Small immediate surrounding workforce Multiple ownerships likely to complicate and delay consolidation of the estate

Source: BE Group, 2021

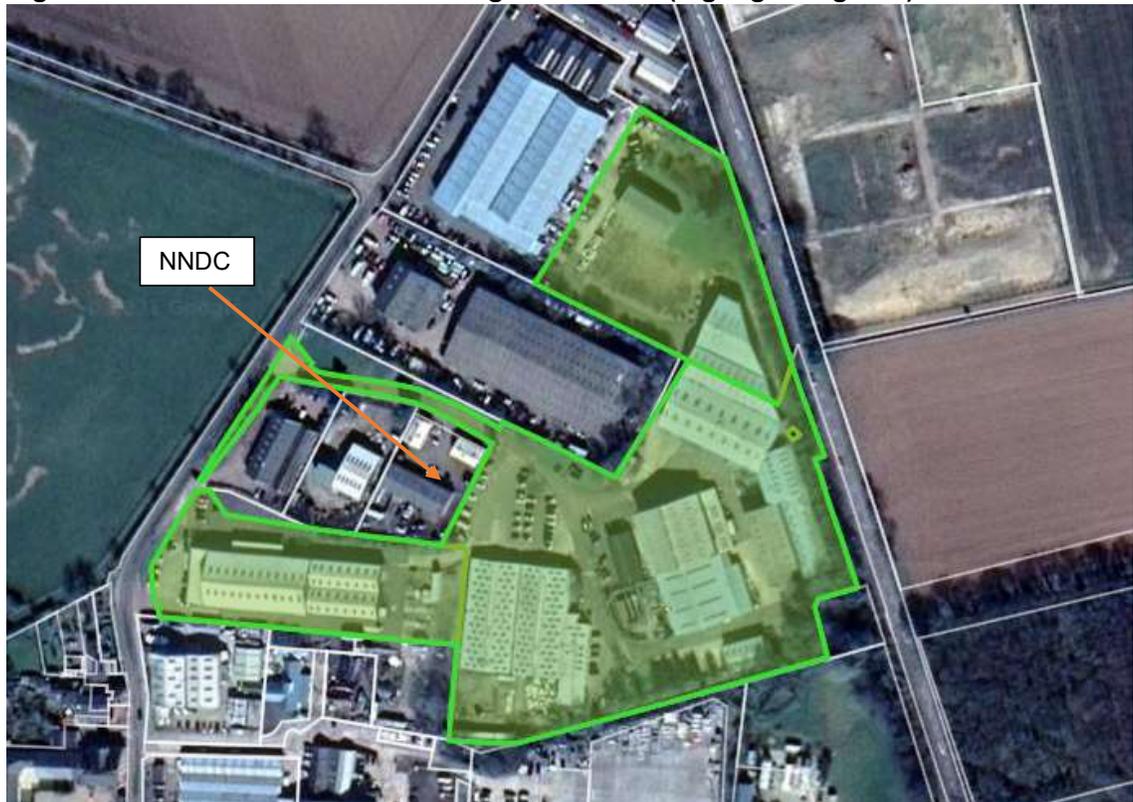
8.120 New development within the industrial estate must come through the consolidation of existing uses/operations to enable a preferred or more efficient redevelopment outcome. However, replacing older stock for newer premises, with only likely a modest increase in development density is likely to be uneconomic. The most likely means of such consolidation occurring would be led by Trend Marine, reducing their footprint and releasing extraneous land for development.

8.121 The development of the Sands Agricultural Machinery unit to the east of the A149 may encourage other landholders on the eastern side of the road to also consider employment developments. However, for the foreseeable future, this should be resisted, with employment uses consolidated as much as possible on the western side of the A149.

8.122 It is not considered feasible or practical to undertake a full redevelopment of the Catfield Industrial Estate site. It is functioning with high occupancy levels (though some underutilised space) and still has an important economic function. Furthermore, full redevelopment costs would be prohibitive.

8.123 Rather, the focus should be on encouraging Trend Marine to consolidate their operations, with the ultimate goal to be the release of some of their land for development. The figure below highlights Trend Marine's landholdings. NNDC's adjacent landholding is also highlighted. This map illustrates that Trend Marine's landholdings are significant, but largely internal to the industrial estate. With direct access from the A149 unlikely, releasing part of the site for redevelopment would need to consider access via Sutton Road/The Street.

Figure 20 – Trend Marine Landholdings at Catfield (highlighted green)



Source: LandInsight, 2021

8.124 The other focus for renewal of this industrial estate should be improving the entry-point uses at the intersection of A149 and Sutton Road. This site currently has buildings of a basic standard, which do not provide a strong statement for the industrial estate. The renewal of this site could help reinvigorate the site overall and catalyse further redevelopment. The landholding is in private ownership and is illustrated below. The opportunity for this land parcel would be for a mix of high-quality B2/B8 units and potentially some small, ancillary services (convenience retail, takeaway outlet) that would support the worker population within the industrial estate.

Figure 21 – Entry-point Landholding at Catfield Industrial Estate



Source: LandInsight, 2021

Delivery Options

- 8.125 The site is in multiple ownerships, with NNDC only having a small landholding. Council's role would be encouraging the improvement and enhancement of the Industrial Estate, through consolidation and renewal of uses. Council does not have capacity to directly push through a comprehensive redevelopment of the site without substantial land acquisition, which would be cost prohibitive.

Table 44 – Delivery Options

Delivery Mechanism	Comments
Leave to the market	NNDC may choose to have no input, other than as the planning authority and providing its usual business support and advice. Development and renewal of the site would still occur over time but may take several years and is still at risk of being a piecemeal approach.
Light Touch	Encouragement of landholders to consolidate their uses and release land for development, particularly for Trend Marine and entry-point site. Encourage holders of older premises that are at the end of their economic life to consider refurbishment or redevelopment options. NNDC to highlight market requirements in the area.
Funding support	NNDC can have a role in providing gap funding for the project, through being the liaison between the landholders and other public bodies (LEP, NCC, Government agencies) to secure funding or through direct assistance itself.
Joint venture with the landholder	NNDC and Trend Marine (and potentially other adjacent landholders) to pool landholdings to develop the site in partnership, with NNDC committing to taking a portion of the end product as business units to be leased out.
Land acquisition	NNDC could acquire the site (part or full) to develop the site itself, either through a joint venture with a developer or as the developer, though likely to be cost prohibitive.

Source: BE Group, 2021

Constraints to Development

8.126 The following list the key development constraints in relation to the Catfield Industrial Estate.

- Multiple ownerships
- Confused layout of buildings
- Some buildings of a poor standard
- No significant vacant land parcels to enable straightforward development

Recommended Approach for NNDC

8.127 This section considers Council involvement in the redevelopment of the Trend Marine and entry-point sites, which are the two main potential areas for consolidation and renewal within Catfield Industrial Estate. For both projects, the recommendation is that Council takes a low level approach to involvement.

8.128 For the Trend Marine site, NNDC should engage with Trend Marine to encourage the consolidation of their operations into a smaller, more efficient footprint. NNDC could provide planning advice to help to streamline the process, but it is not recommended that the Council take an active role in any redevelopment of this site. However, Council

should monitor progress and, in the longer term, once Trend Marine has established their needs and are looking to release a site(s), Council should provide an advisory role to potential buyers and occupiers of the site.

8.129 For the entry-point site, there have been recent plans, which while not pursued, indicate landholder interest in redeveloping this site. This should be supported by Council if it provides for high-quality employment units, particularly smaller B2/B8 units. The landholder should be encouraged to bring forward a high quality design, reflective of the high prominence of the site. Ancillary services, such as a small quantity of convenience retail or takeaway uses, could be supported, if to function primarily to support the Catfield Industrial Estate population and not detract from the existing retail provision. In bringing this site forward, Council's role should be limited to planning advice/support and encouraging the development within a timely manner. It is not considered that NNDC need to take a more active role in the development or to commit to a lease/sale of all or part of the units. This development could take place with minimal public sector intervention.

Action Plan

8.130 The table below provides an overview of the Action Plan for the Catfield Industrial Estate.

Table 45 – Action Plan

Action	Lead Entity	Timing
• NNDC engagement with Trend Marine to encourage consolidation of uses landholder	NNDC, Trend Marine	Short term
• NNDC to provide planning support for redevelopment opportunities for Trend Marine	NNDC, Trend Marine	Medium term
• NNDC to continue to provide planning support for entry-point site	NNDC, Landholder	Short term

Source: BE Group, 2021

9.0 PRIORITISATION

- 9.1 The delivery strategy outlined in the previous chapter discussed a range of projects, which will consume NNDC time and resources if pursued. Therefore, it may not be possible for NNDC to take active roles in the development of all the schemes discussed. As such, it is appropriate to consider the prioritisation of the schemes for consideration. This prioritisation is from the perspective of NNDC input. If a landholder looks to bring forward a project sooner than other priorities listed below, this should not be discouraged. Rather, this list is the prioritisation of NNDC's focus and effort.
- 9.2 **Priority One: Fakenham. High Priority.** This location has a high level of urgency in terms of needing further supply of employment land. Furthermore, it appears that the EMP24 site can be developed in a viable manner. The site is partially in control of an active developer. NNDC input can be initiated in the short term. If the EMP24 site encounters obstacles or is delayed, then NNDC can commence investigations on the alternative Fakenham site, to the south of the Football Club.
- 9.3 **Priority Two: North Walsham. High Priority.** North Walsham has an urgent need for further employment units. However, the path forward for the development of this employment allocation is not as clear as for Fakenham, with a scheme unlikely to be viable in the current market. NNDC intervention is likely to be required to help spur development.
- 9.4 **Priority Three: Holt. Medium Priority.** The western Holt employment site is the first focus in Holt and is a rare site for further employment uses in the central area of the District. NNDC committing to an incubator/workshop scheme would be a significant investment for the Council, but appears to be the most likely means of delivering a range of employment uses on this site. The eastern site is a longer term option, with no anticipated NNDC intervention at this time.
- 9.5 **Priority Four: Catfield. Medium/Low Priority.** Trend Marine should lead any redevelopment and consolidation of uses within its landholdings, with low level support from NNDC. The entry-point site is a near term redevelopment opportunity that should be supported, but should not have more than a light touch involvement from Council.
- 9.6 **Priority Five: Melton Constable. Low Priority.** The redevelopment of this long-term vacant unit will be difficult and costly, and unlikely to be economic. NNDC should

continue to support the landholder and assist with linking with potential occupants, but is a low priority for NNDC intervention.

APPENDIX 1

VACANCY SCHEDULE

Appendix 1 – Vacant Property Schedules

Industrial

Address	Tenure	Size		Rent / Price (£/Sqm)	Price
		Sqft	Sqm		
Tradebase, Unit 25, The Street, Catfield, Norfolk, NR29 5AA	LH	1,557	145	7.05	10,983
Tradebase, Unit 5, The Street, Catfield, Norfolk, NR29 5AA	LH	2,397	223	6.24	14,950
2, CORNISH WAY BUSINESS PARK, NORTH WALSHAM, NR28 0FE	LH	30,203	2,806	3.72	112,500
The White House, Laundry Loke, North Walsham, NR28 0BX	LH	6,628	616	4.25	28,200
Melton Constable Industrial Estate, Marriott Way, Melton Constable, Norfolk NR24 2AZ	LH	39,111	3,634	1.74	68,000
Hempstead Road Business Centre, Hempstead Road, Holt, NR25 6EE	LH	29,797	2,768	3.02	90,000
Scottow Enterprise Park, Lamas Road, Badersfield, Norwich, Norfolk, NR10	LH	56,049	5,207	N/A	POA
Unit F, Hornbeam Business Park, Hornbeam Road, North Walsham, NR28 0FQ	LH	2,295	213	N/A	POA
Unit E, Hornbeam Business Park, Hornbeam Road, North Walsham, NR28 0FQ	LH	2,295	213	N/A	POA
Unit D, Hornbeam Business Park, Hornbeam Road, North Walsham, NR28 0FQ	LH	2,184	203	N/A	POA
CREAKE BUSINESS PARK AT THE COMMON, SOUTH CREAKE - 1 Unit	LH	1,616	150	6.50	10,500
CREAKE BUSINESS PARK AT THE COMMON, SOUTH CREAKE - 1 Unit	LH	1,616	150	6.50	10,500
Unit B, Hornbeam Business Park, Hornbeam Road, North Walsham, NR28 0FQ	FH	3,121	290	96.12	300,000

Office

Address	Tenure	Size		Rent (£/Sqm)	Price
		Sqft	Sqm		
Unit 1, New Street Chambers, New Street, Holt, Norfolk, NR25 6JJ	LH	108	10		1,248
Unit 4, New Street Chambers, New Street, Holt, Norfolk, NR25 6JJ	LH	118	11		1,320
Unit 35 S Scottow Enterprise Park, Lamas Road, Badersfield, Norwich, Norfolk, NR10	LH	143	13		POA
Unit 6, New Street Chambers, New Street, Holt, Norfolk, NR25 6JJ	LH	153	14	9.80	1,500
Unit 35 R Scottow Enterprise Park, Lamas Road, Badersfield, Norwich, Norfolk, NR10	LH	154	14		POA
Office 25 Hempstead Business Park	LH	164	15		POA
Office 2, Central Road, Cromer, Norfolk, NR27 9BW	LH	188	17	15.96	3,000
Unit 35 K Scottow Enterprise Park, Lamas Road, Badersfield, Norwich, Norfolk, NR10	LH	201	19		POA
office 3, Central Road, Cromer, Norfolk, NR27 9BW	LH	233	22	14.03	3,270
office 4, Central Road, Cromer, Norfolk, NR27 9BW	LH	453	42	14.02	6,350
Unit 35 P Scottow Enterprise Park, Lamas Road, Badersfield, Norwich, Norfolk, NR10	LH	540	50		POA
Bullen Business Centre, Central Road, Cromer NR27 9BW	LH	686	64	14.02	9,620
GROVE FARM, GROVE ROAD, GIMINGHAM, NR11 8HQ	LH	731	68	19.49	14,250
Offices At 11 Garden Street, Cromer, NR27 9HN	LH	829	77	11.77	9,756
office 6, Central Road, Cromer, Norfolk, NR27 9BW	LH	961	89	14.05	13,500
16 Waterbank House, Station Approach, Sheringham, Norfolk, NR26 8RA	LH	979	91		
3/4 The Old Mill, Norwich Road, Wroxham, Norwich, NR12 8DA	LH	1,097	102	7.29	8,000
7a, Norwich Road, Fakenham, NR21 8AU	LH	1328	123	7.00	9,300
Office 24 Hempstead Business Park	LH	1698	158		POA
Upper Floor Offices, 22 Market Place, North Walsham, Norfolk NR28 9BH	LH	1,944	181	4.63	9,000
West Street, Cromer, Norfolk, NR27	LH	-	-		7,008

APPENDIX 2

LIST OF CONSULTEES

Appendix 2 – List of Consultees

Bayfield Estate
Chamber for Business
Citygate Developments
Coda Plastics
Crisp Malt
East Anglia Local Enterprise Partnership
Holkham Estates
Jack Richards and Sons
Kelling Estate
Ladbrook
Maretts Chariots
North Norfolk District Council
RG Carter Group/Bullens
Sanders Coaches
Sands Machinery
T5 Limited
The Pigs
Trend Marine
Wall Engineering
Walsingham Estate

APPENDIX 3

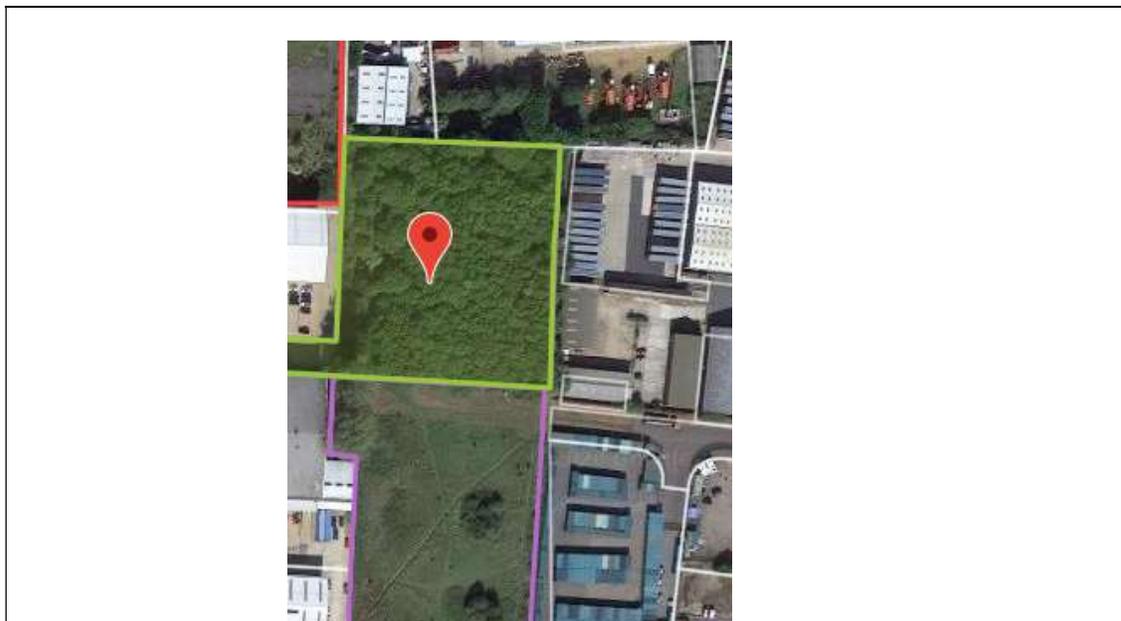
SITE PROFORMAS

Employment Site Proforma

Employment Land



Site Reference Number	EMP03/2 (part)
Name	Land to the west of Holt Rd
Owner(s)	RG Carter Group
Vacant Land Available	1.72 ha
Market Availability	Not currently on the market
Planning Applications	No current applications or permissions
Constraints	AONB
Comments	Former industrial unit now demolished. Landholder to develop for their purposes, but no timeframe as yet
Likely development potential	Suitable in the short term for industrial units, either a single larger unit c. 5,000 sqm or smaller units c. 500-2,000 sqm each
Serviced	Yes



Site Reference Number	EMP05 (part)
Name	Hain Frozen Foods, Holt Rd
Owner(s)	Hain Frozen Foods UK Ltd
Vacant Land Available	1.01 ha
Market Availability	Not currently on the market
Proposal	No current applications or permissions
Constraints	Trees on full site
Comments	Spare land under the control of Hain Frozen Foods. Landholder to retain for foreseeable future.
Likely development potential	Potential for a mix of small to medium B2 or B8 units if available to the general market. Landholder may develop for long-term expansions.
Serviced	Yes



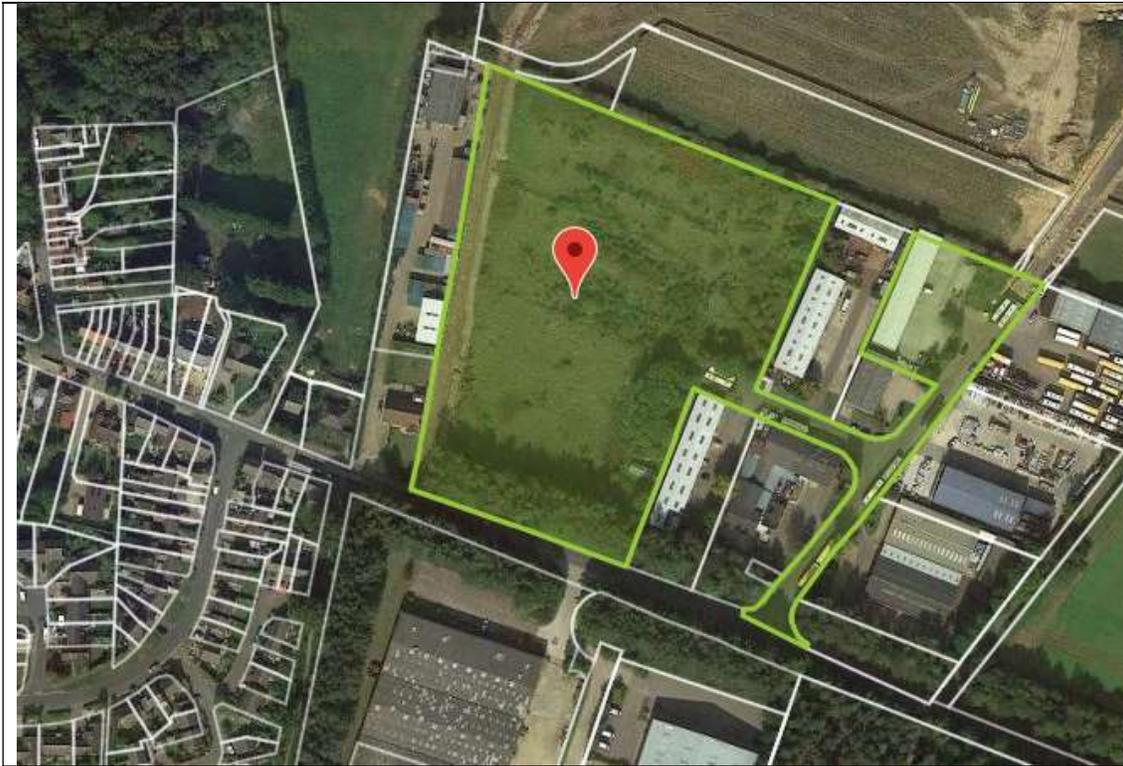
Site Reference Number	EMP05 (part)
Name	Vacant land to the south of Lidl
Owner(s)	Lidl Great Britain Ltd
Vacant Land Available	0.80 ha
Market Availability	Not currently on the market
Proposal	No current planning applications or permissions
Constraints	Access would need to be delivered through the Lidl car park, which would be reasonable if connected with the Lidl use, though if developed for another use would potentially be more problematic. Partially treed.
Comments	Spare land under the control of Lidl. Landholder to retain for foreseeable future.
Likely development potential	Potential for a mix of small to medium B2 or B8 units if available to the general market. Landholder may seek a more complementary use to its existing operations.
Serviced	



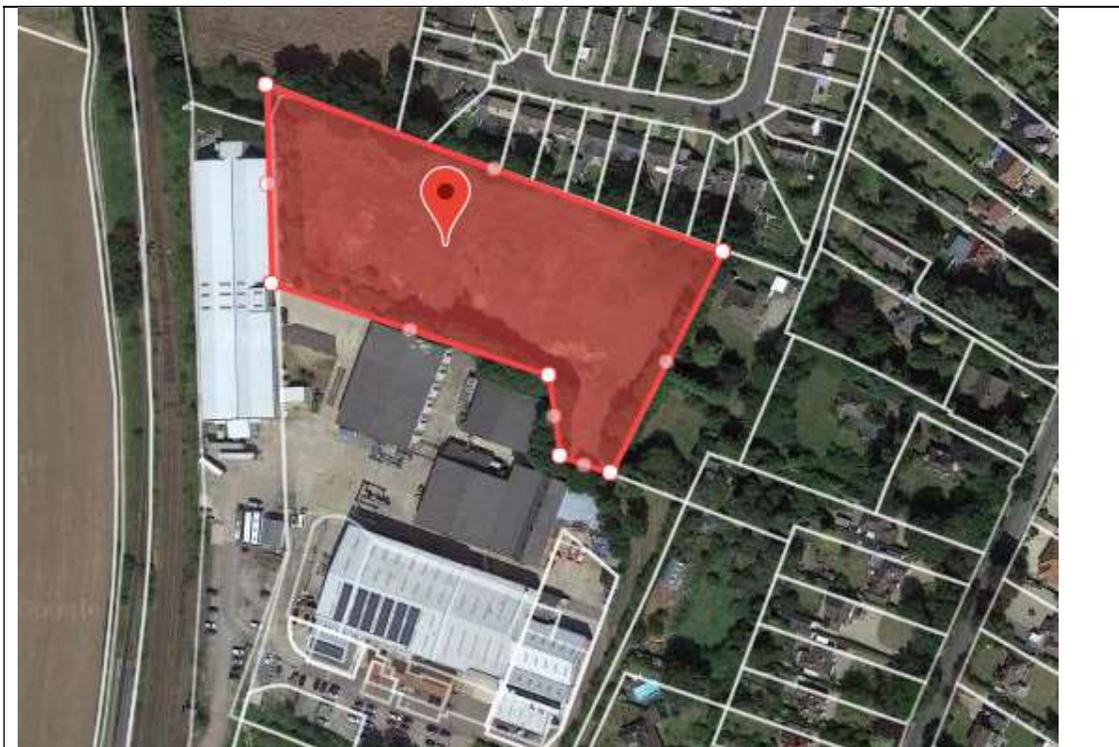
Site Reference Number	EMP05 (part)
Name	Land to the north side of Parker Dr
Owner(s)	Gorgate Ltd
Vacant Land Available	1.31 ha
Market Availability	Not currently on the market
Proposal	No current planning applications or permissions
Constraints	Nil
Comments	Remaining developable plot, accessed via Wymans Way. Not a high profile site, but appears developable in a straightforward manner.
Likely development potential	Potential for a mix of small to medium B2 or B8 units.
Serviced	Yes



Site Reference Number	EMP11/1
Name	Former Thaxters site
Owner(s)	MW Trustees Ltd
Vacant Land Available	0.51 ha
Market Availability	Not being actively marketed
Proposal	2015 planning permission for food store on the site, though this has not been advanced.
Constraints	Narrow access from rear of site
Comments	Retail permission has not been enacted upon, with further softening of the retail market since 2015 suggesting that alternative uses may need to be explored
Likely development potential	If not developed in line with permissions, the site could support a range of small B-class units.
Serviced	Yes



Site Reference Number	EMP10/1
Name	Heath Dr Industrial Estate
Owner(s)	Bullen Properties Ltd
Vacant Land Available	3.6 ha
Market Availability	Currently being marketed for pre-lets of industrial and office units at about 415 sqm. Units have yet to be constructed.
Proposal	Potential development if sufficient pre-interest is secured for light industrial and office units.
Constraints	Access via residential streets.
Comments	Site has been allocated and on the market for a considerable time without being developed. Bullen Properties have been prepared to wait on this site. There is some risk that there will be attempts to develop residential on the site. However, it still represents a good opportunity for a mix of employment uses in the medium term.
Likely development potential	Mix of employment uses, predominantly industrial. Likely unit sizes would be <500 sqm.
Serviced	



Site Reference Number	EMP12 (part)
Name	Tilia Business Park – Oyster Yachts site
Owner(s)	Oyster Yachts
Vacant Land Available	1.08 ha
Market Availability	Not currently being marketed
Proposal	Erection of 28 residential dwellings approved in October 2018 (App No: PO/15/0539).
Constraints	In a backlands site, requires access through remainder of Oyster Yachts property. Neighbouring residential dwellings
Comments	Potential expansion opportunity for Oyster Yachts but not a practical site for general market.
Likely development potential	Industrial and storage uses.
Serviced	



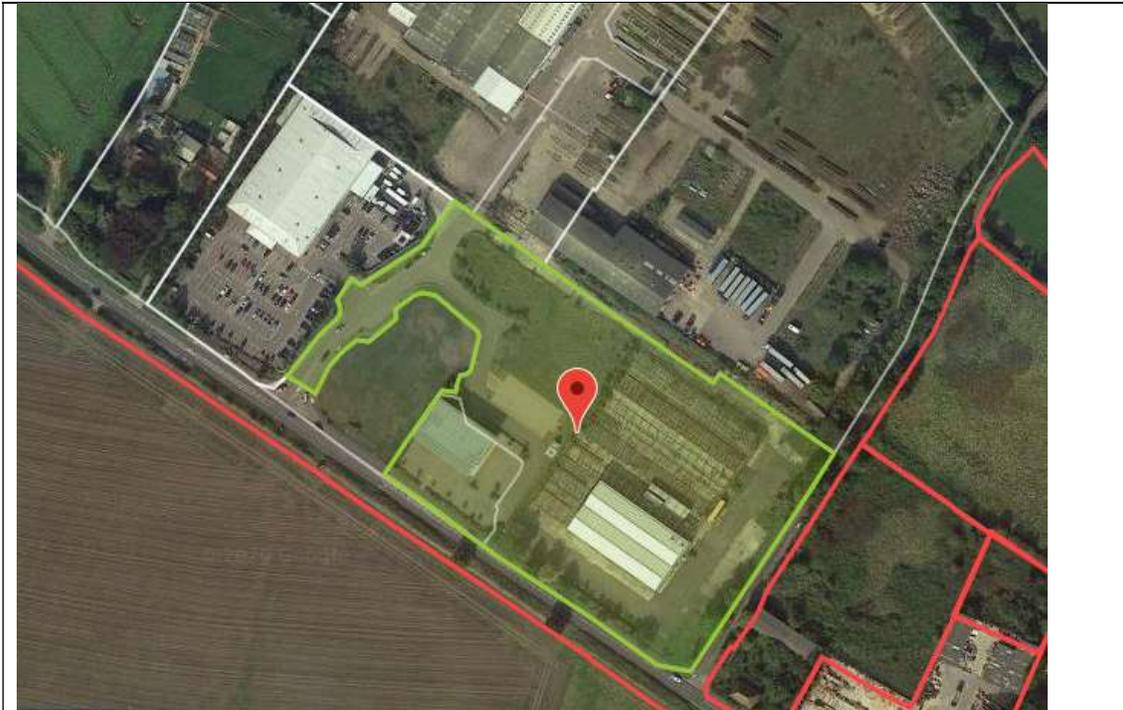
Site Reference Number	EMP12 (part)
Name	Tilia Business Park
Owner(s)	Tilia Business Park Ltd
Vacant Land Available	0.76 ha
Market Availability	Land being marketed directly by Tilia Business Park
Proposal	No currently applications or permissions
Constraints	Backlands location, poor prominence. Potential conflicts with neighbouring uses
Comments	Site's poor prominence means that it will have a narrower market.
Likely development potential	Potential for lower order industrial or storage uses, including outdoor storage.
Serviced	Yes



Site Reference Number	EMP13 (part)
Name	Hoveton East Employment Area
Owner(s)	Benthic Solutions Ltd
Vacant Land Available	0.27 ha
Market Availability	Not currently being marketed
Proposal	No current applications or permissions
Constraints	Low prominence
Comments	Flat site could link the new Benthic Solutions building and the remainder of the Hoveton East Employment Area
Likely development potential	Potential for small units, or expanded Benthic Solutions needs
Serviced	Yes



Site Reference Number	EMP15 (part)
Name	Lyngate Rd Industrial Estate
Owner(s)	Southrepps Developments Ltd
Vacant Land Available	0.62 ha
Market Availability	Owner of this site is the developer of the wider estate, with this site representing the last parcel within the current allocation
Proposal	No current applications or permissions
Constraints	Poor prominence within the estate
Comments	Developable in the short term.
Likely development potential	Likely to be either B2 or B8. Could be developed for a single occupier or several smaller occupiers.
Serviced	Yes



Site Reference Number	EMP18 (part)
Name	Cromer Rd Industrial Estate
Owner(s)	Citygate Developments Ltd
Vacant Land Available	2.55 ha
Market Availability	Citygate Developments Ltd are marketing the site themselves for design and build opportunities
Proposal	Previous application for residential refused (App No: PF/19/0827)
Constraints	Partially demolished units would need to be cleared
Comments	This site is a prominent location at a gateway location to North Walsham. As part of the broader Western Extension area, this site is a key opportunity for development
Likely development potential	Site would be appropriate for a mix of B1, B2, B8 uses or a significant size range. Potential for a range of high quality units.
Serviced	Partially



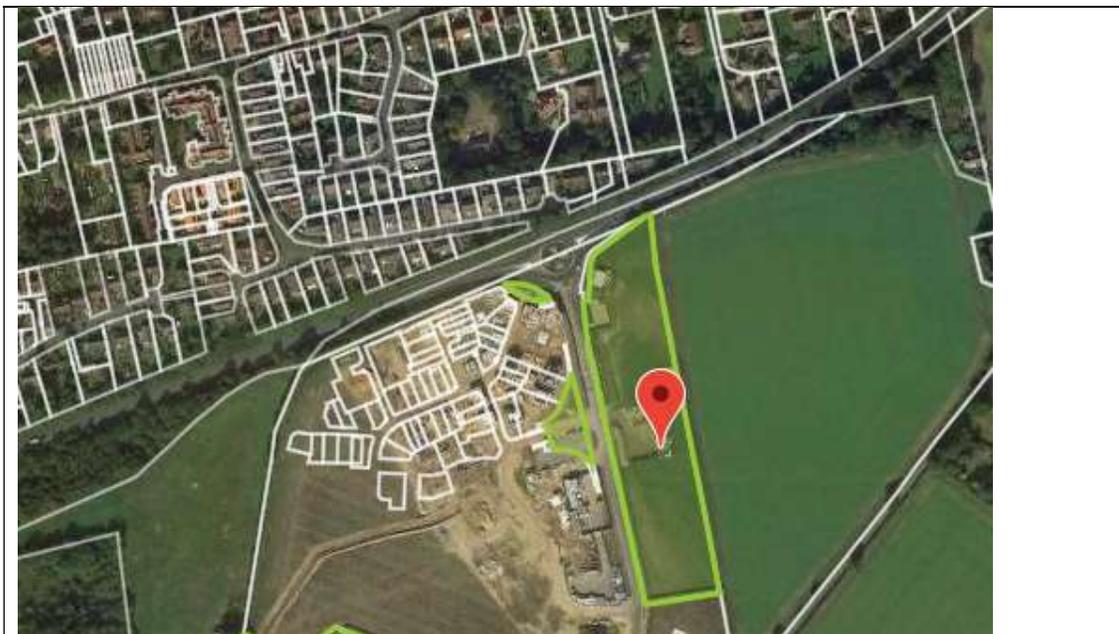
Site Reference Number	EMP19 (part)
Name	Travis Perkins
Owner(s)	Travis Perkins
Vacant Land Available	0.18 ha
Market Availability	Not currently being marketed
Proposal	No current applications or permissions
Constraints	Backlands site
Comments	
Likely development potential	Unlikely to be developable in isolation. Only development opportunity would be as an expansion of Travis Perkins' operations.
Serviced	



Site Reference Number	EMP23 (part)
Name	Polka Rd
Owner(s)	Christopher Reynolds
Vacant Land Available	0.23 ha
Market Availability	Not currently being marketed
Proposal	No current applications or permissions
Constraints	Poor prominence
Comments	Small site partly used for outdoor storage.
Likely development potential	Outdoor storage or small B2/B8 unit
Serviced	



Site Reference Number	EMP24
Name	West of Thorpland Rd
Owner(s)	Magnus Whyte Property Investments Ltd Trinity (F) Ltd CE Davidson Farms Ltd
Vacant Land Available	6.11 ha
Market Availability	Not currently being marketed
Proposal	No current applications or permissions
Constraints	Access would need to be opened up. Triangular shape of site means that some yield of land may be lost in the south (though this would be less valuable part of site anyway)
Comments	Key development site with good prominence. However, yet to come forward despite being allocated for considerable time.
Likely development potential	Good site for a range of B-class uses and a range of sizes (up to 5,000 sqm as required). Potential for high-quality units attracting key businesses.
Serviced	No



Site Reference Number	EMP25
Name	Heath Dr
Owner(s)	North Norfolk Tomatoes
Vacant Land Available	1.68 ha (only part likely to be developed for B-class uses)
Market Availability	Land currently being marketed as a development site
Proposal	Outline planning permission for A2, A3, B1, C1, C2, D1
Constraints	Near to new build residential
Comments	Site has excellent prominence and is an eastern gateway site for Holt. Heath Dr is earmarked to extend to industrial areas to the south, though not a realistic functional link due to the residential development.
Likely development potential	Development potential is for a mixed-use scheme, which could include a B1 element, through the focus would be on leisure (dining, hotel, café) uses.
Serviced	Yes



Site Reference Number	EMP26
Name	Norwich Rd
Owner(s)	Westover Vets Ltd Birchwood Building Ltd Peal Estates Property Ltd
Vacant Land Available	0
Market Availability	Recently developed
Proposal	Recently developed for vets, Screwfix and B2/B8 units
Constraints	Narrow site
Comments	Good quality units recently developed
Likely development potential	
Serviced	Yes



Site Reference Number	EMP27
Name	Norwich Rd
Owner(s)	Peter and Annette Tofts
Vacant Land Available	0.84 ha
Market Availability	Land currently being marketed as development site
Proposal	Outline planning consent for A3, A4, B1, B8, C2 uses Application currently being considered for extra care housing complex comprising 77 apartments for the elderly and car parking
Constraints	
Comments	Potential to link with neighbouring areas, such as the redevelopment of the Ladbroke's site
Likely development potential	Development to proceed in accordance with consent. B-class uses likely to represent a supporting element of a mixed-use development
Serviced	Yes



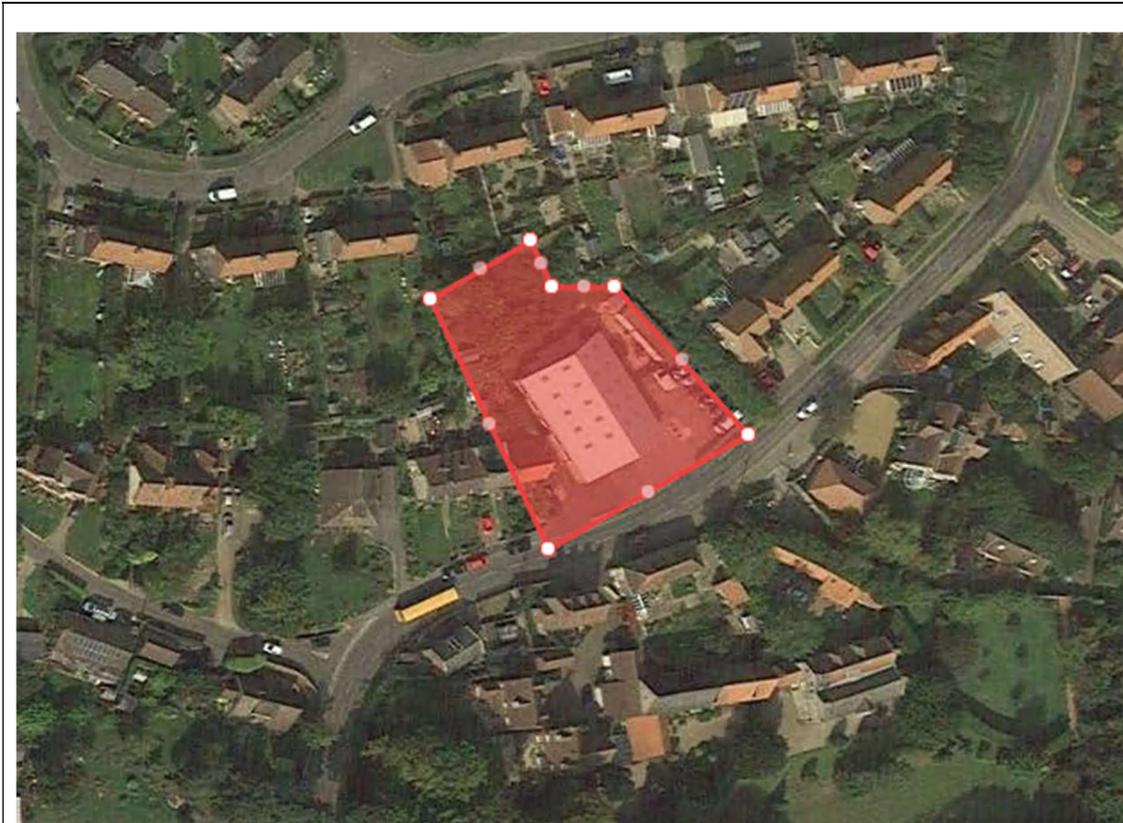
Site Reference Number	
Name	Catfield (part of Catfield industrial estate)
Owner(s)	Graham Walton
Vacant Land Available	0.34 ha
Market Availability	Not currently being marketed
Proposal	Application for the Erection of up to 5 dwellings or a mix of dwellings and holiday lets. Decision stated as "advice given (for pre-apps)"
Constraints	Access
Comments	Small in-fill site as remaining site within Catfield industrial estate. Site could support B2 or B8 units. Some consolidation of underutilised elements in the remainder of the estate could also yield further floorspace.
Likely development potential	Small B2 or B8 units, including open storage. Could be developed for a single occupier or a small number of units for multiple occupiers
Serviced	



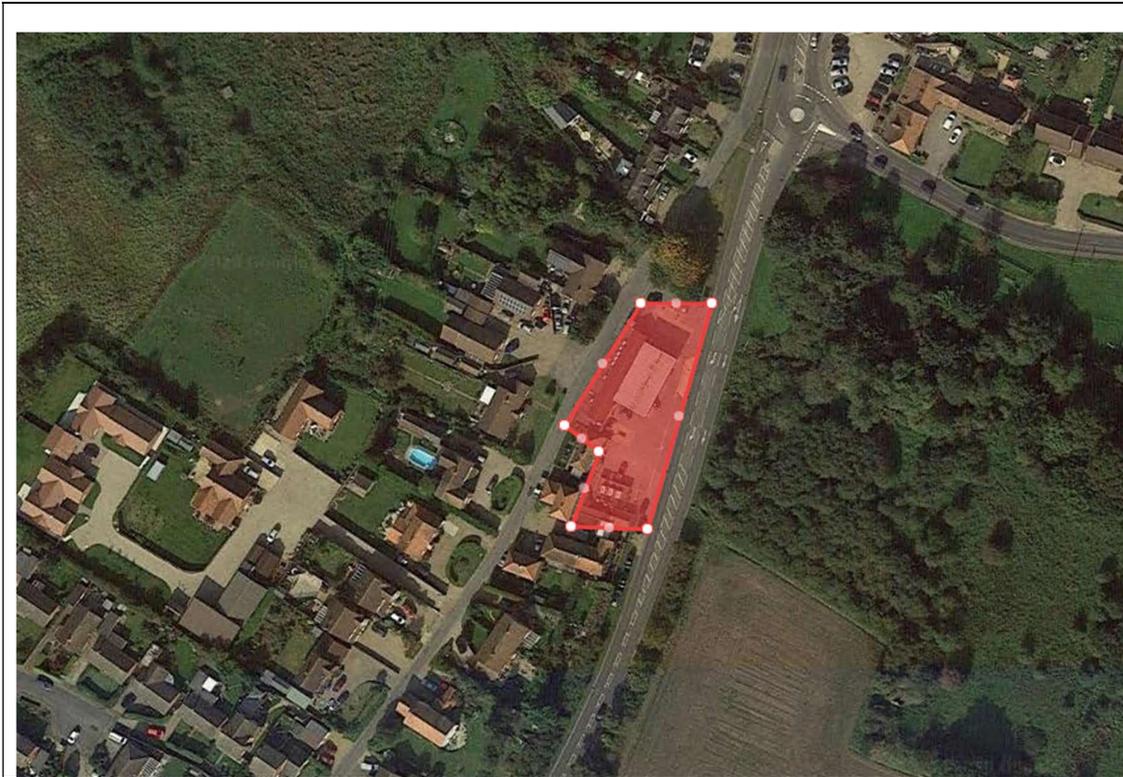
Site Reference Number	
Name	Land north of B1149
Owner(s)	Niven Brian Last, 6 smaller landholdings
Vacant Land Available	0 ha
Market Availability	Not currently being marketed
Proposal	No applications or permissions
Constraints	
Comments	Crossroads Garage to the south of the site. Small, dated industrial units found on the rest of the site.
Likely development potential	Fully developed
Serviced	Yes



Site Reference Number	
Name	Land off North Road
Owner(s)	Alboro Developments Limited, Lawrence Hugh Sear, Ian Richard Beeby
Vacant Land Available	0 ha
Market Availability	Not currently being marketed
Proposal	No applications or permissions
Constraints	In a protected area
Comments	Crossroads Garage to the south of the site. Small, dated industrial units found on the rest of the site. Situated in a residential area.
Likely development potential	Fully developed
Serviced	Yes

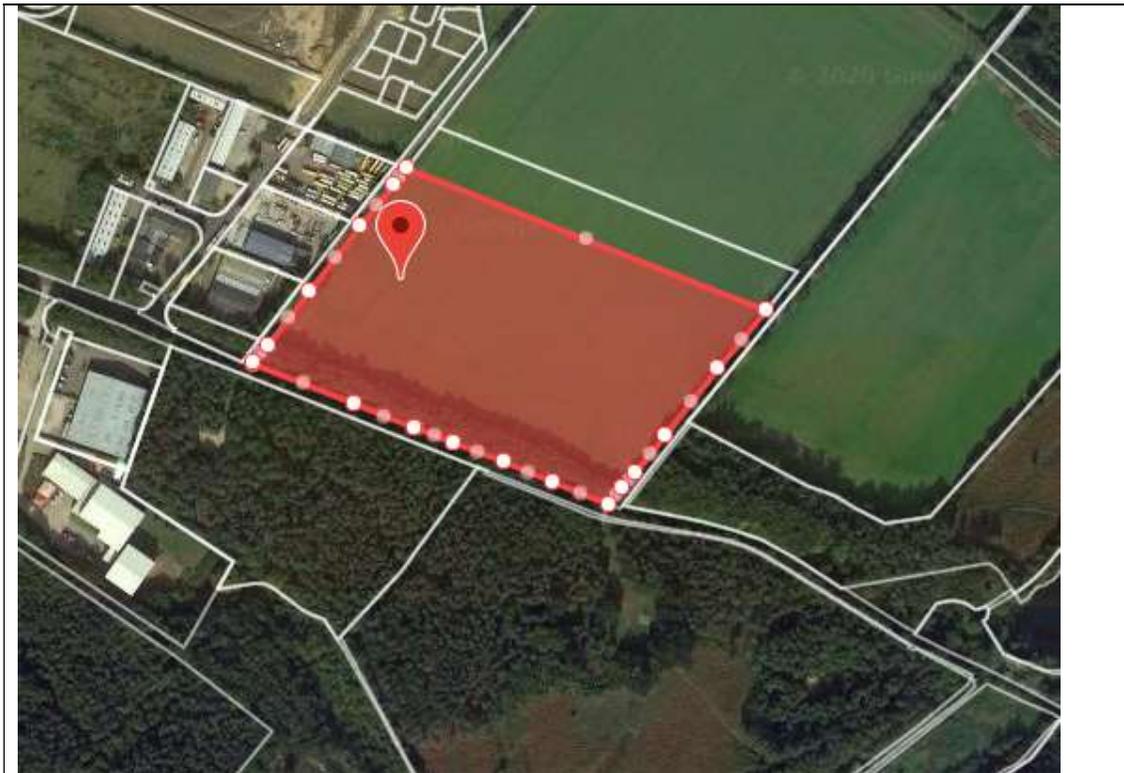


Site Reference Number	
Name	Land North of High Street
Owner(s)	Andrew Thomas Cosgrove
Vacant Land Available	0 ha
Market Availability	Not currently being marketed
Proposal	No applications or permissions
Constraints	In a protected area
Comments	Jen-bar Garage on site. Car parking adjacent to the road and on the east side of the site. No vacant areas available unless green space to the rear of the property in cleared.
Likely development potential	Fully developed
Serviced	Yes



Site Reference Number	
Name	Land off Norwich Road
Owner(s)	Ptarmigan Holdings Limited
Vacant Land Available	0 ha
Market Availability	Not currently being marketed
Proposal	No applications or permissions
Constraints	Northern half of site lies within Flood Zone 2 and 3
Comments	Roughton Service Station and Post Office on site. Parking at both the north and south end of the site.
Likely development potential	Fully developed
Serviced	Yes

Employment Allocations



Site Reference Number	H27/1
Name	Land at Heath Farm
Owner(s)	North Norfolk Tomatoes
Vacant Land Available	5.43 ha
Market Availability	Not currently being marketed
Proposal	No applications or permissions
Constraints	Access would be past residential areas
Comments	Potential for medium to longer term expansion, of the employment node in this location. However, does not solve the constraint that limits the existing sites of having to pass residential areas to access the site. Would require alternative link to A148 to improve this.
Likely development potential	B1, B2 and B8 uses of a range of sizes, from start up units to mid size industrial premises.
Serviced	No



Site Reference Number	E10
Name	Land off Cornish Way
Owner(s)	Southrepps Development Ltd
Vacant Land Available	5.11 ha
Market Availability	Site is being marketed by developer as future development site
Proposal	No applications or permissions
Constraints	Low Plains Farmland
Comments	Good opportunity site for growth of this area to relieve capacity issues within existing estate.
Likely development potential	Good opportunity for a range of B2 and B8 uses as well as providing land for a link road to Cromer Rd. This link road and the shape of the site will mean that the land yield is reduced
Serviced	No



Site Reference Number	E7
Name	Tattersett Business Park
Owner(s)	TP5 Ltd
Vacant Land Available	3.87 ha
Market Availability	Land and premises within Tattersett Business Park being promoted by landholder
Proposal	Some existing consents on undeveloped land
Constraints	Infrastructure provision Poor internal roads Poor quality buildings Lacks prominence
Comments	Landholder has interest in a mixed-use scheme, including residential dwellings and not looking for significant investment in employment in the site.
Likely development potential	Lower order employment uses. Further investment could broaden likely options, though would still be for those looking for large landholdings and lower price points.
Serviced	Partly

Enterprise Zones



Site Reference Number	
Name	Scottow Enterprise Park
Owner(s)	Norfolk County Council
Vacant Land Available	7.3 ha approximately
Market Availability	Landholder promoting sites and premises within EZ
Proposal	Subject to EZ provisions
Constraints	Some poor quality buildings Poor access through local highways network
Comments	Development of vacant land within Scottow likely to be a lower priority than refurbishment and occupation of existing buildings. Attractiveness of the EZ may be reduced once EZ incentives expire.
Likely development potential	Range of sizes for B2 and B8 uses
Serviced	Partly



Site Reference Number	
Name	Egmere Enterprise Zone
Owner(s)	Walsingham Estates
Vacant Land Available	5.0 ha
Market Availability	Not currently being actively marketed
Proposal	Subject to LDO (lapsed)
Constraints	Rural location
Comments	Lack of development with the EZ and LDO backing in place is a concern and suggest a low demand for land in this area.
Likely development potential	Outdoor storage or small to mid-sized workshops are the most likely markets for this site.
Serviced	No

Mixed Use Allocations with Potential for Employment



Site Reference Number	NW01/B
Name	Land at Norwich Road and Nursey Drive
Owner(s)	Waking Engineering Company Ltd, Ladbrook Engineering and Manufacturing Company Ltd, N W Rentals LLP, William Legrice, James Legrice, Patricia Legrice and Janet Bartrop
Vacant Land Available	18.62 ha (2.0 ha for employment)
Market Availability	Not currently being actively marketed
Proposal	Proposal for 100 dwellings and 0.89 Ha of commercial space accepted in 2015
Constraints	Not a consolidated site, with access from two locations
Comments	This is a mixed-use site on the Norwich Road to the south of North Walsham. The land is in several ownerships and comprises green field parcels, existing businesses and land associated with the garden centre.
Likely development potential	Development will be residential led. This provides some opportunity to regenerate the employment uses on site, with Ladbrook indicating through the consultation process that they are looking to update their facilities.
Serviced	Yes



Site Reference Number	NW62
Name	North Walsham Western Extension
Owner(s)	R B R (crops) Limited and numerous other landholdings
Vacant Land Available	95 ha (7.0 ha for employment)
Market Availability	Not currently being actively marketed
Proposal	No current permissions on site
Constraints	Multiple land parcels and ownerships. Substantial infrastructure requirements
Comments	The proposed Western Extension for North Walsham covers a significant area of land that stretches from the railway line to the north west of the town, across arable land - around the west of the town, to Norwich Road to the south. The suggested development area covers a total 95 hectares and would envelop Link Road, Greens Road, Aylsham Road, Tungate Road and Skeyton Road.
Likely development potential	Development will be residential led. Consortium is actively proceeding with planning for the site. The likely employment land to the north of Cromer Rd could be developed separately. A spine road would benefit the site, including employment areas and relieve traffic issues in North Walsham. Employment uses likely to be a wide range of unit sizes and incorporate B1, B2, B8 uses. High profile tenants in good quality premises could be expected.
Serviced	No



Site Reference Number	ST23/2
Name	Land north of Yarmouth Road
Owner(s)	Hopkins Homes Ltd Private landholder
Vacant Land Available	4.12 ha (2.0 ha for employment)
Market Availability	Not currently being actively marketed
Proposal	No current planning permissions or applications
Constraints	Grade 1 agricultural land.
Comments	Flat, greenfield site alongside new residential development (also Hopkins Homes). Relatively narrow frontage to Yarmouth Rd, the most likely location for employment uses.
Likely development potential	First Draft Local Plan identifies site for 80 dwellings, employment, community uses and open spaces. Employment uses likely to be range of low-impact, mixed B-class uses
Serviced	No

APPENDIX 4

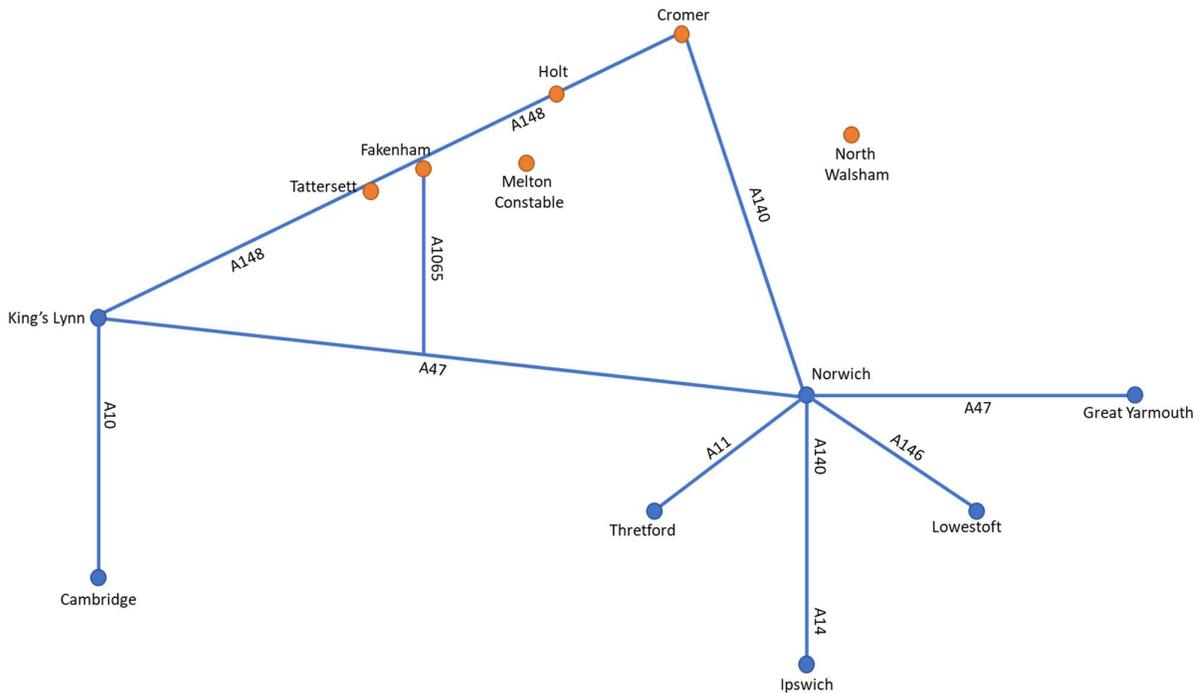
NORTH NORFOLK STRATEGIC TRANSPORT COMMENTARY

Strategic Transport Access of Potential Employment Sites

In this section of the report we provide a brief overview of the strategic access opportunities to North Norfolk, which has a direct impact upon the attractiveness of employment sites to the wider strategic market, and therefore the nature of potential employment. By nature, 'strategic' access in this geography is very different to other parts of England, where locational decisions around motorway and rail connections offer significant opportunity for sectors such as logistics and B1 offices. In considering strategic access for North Norfolk it is important to recognise that relatively isolated locations can indeed have significant local catchment for certain types of industry and therefore become clusters to a more local network.

Strategic Road Network for North Norfolk

The following diagram provides a summary of the primary A roads across Norfolk as a county, with the key locations being considered in relation to employment land in this study marked in orange dots. It is important to note that these are primary routes, although further routes such as the A149 from Cromer via North Walsham to Great Yarmouth are important routes within the county too.



The wider strategic road network connects Norfolk to other counties which include places such as Cambridge and Ipswich through A roads, with the nearest dual carriageways to North Norfolk being south of Norwich oriented towards movement south towards the South East or related to the East West Trunk road formed by the A47 Great Yarmouth to Kings Lynn (eventually linking towards the A1/A1M via Peterborough, or via Lincolnshire towards that same route).

The road layout allows most areas within North Norfolk to easily access key points in the county such as Norwich and market towns such as King's Lynn, within a journey time of an hour.

It is clear that North Norfolk has strong reliance on the A148 Kings Lynn-Fakenham-Cromer road, which is primarily single carriageway. A key feature of this is that it links most of key centres of

population within the District together (namely Fakenham, Holt and Cromer) and is the only road of this nature in the authority area, apart from the lower grade Coastal route from Cromer West. That coastal route is less suitable for larger vehicles and more intrusive on local communities by nature of the fact that it doesn't include by passes that have been developed around both Fakenham and Holt.

A significant proportion of the North Norfolk Population is anticipated to be within 10 minutes' drive (or around 5-10 miles depending on road category and conditions) of the A148 between Cromer and the county boundary west.

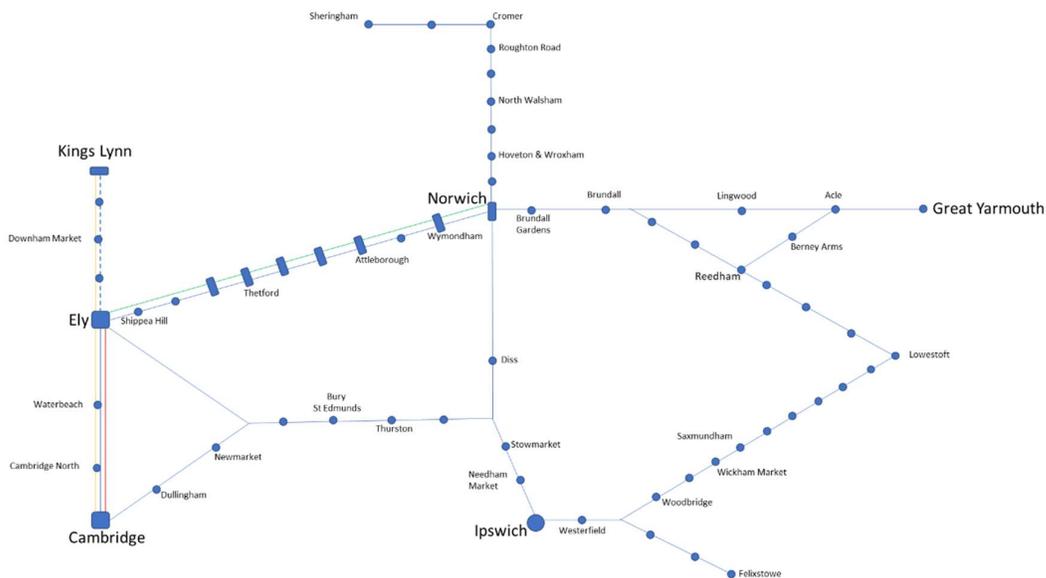
The primary exception is North Walsham, which although apparently less connected is actually closer to two of the key markets in Norwich and Great Yarmouth, being upon the A149 route from Cromer to Great Yarmouth, but with easy linkage across to the A140 and the B1150 to travel south towards Norwich. Although the A149 is classified as 'non-primary A road' the reality is that its standard is generally as good as the primary A roads on the map preceding. A key challenge with that route is the constraints of North Walsham centre itself, which are discussed later in this work, creating both delay and constraint, plus degradation of the town centre environment.

In summary while strategic accessibility is relative to the geographical location within the UK it offers most opportunity along the A148 corridor and routes south from Cromer to and from Great Yarmouth and Norwich. Bigger constraints on the network are likely to lie beyond the district boundary, with particular congestion issues being noted at peak times around Kings Lynn and the need to access dual carriageways around Norwich via the Norwich ring road system which tends to be single carriageway.

One final point on the road network is that the A140 does link to and from Norwich Airport directly, with this amenity being situated on the very northern fringes of the city and therefore providing the opportunity for someone from North Norfolk to access and egress that amenity without significant traffic delay or congestion risk.

Public Transport Access

While the road network is reasonably well developed the rail network is disconnected from a lot of areas within the district and beyond. The following plan shows that network.



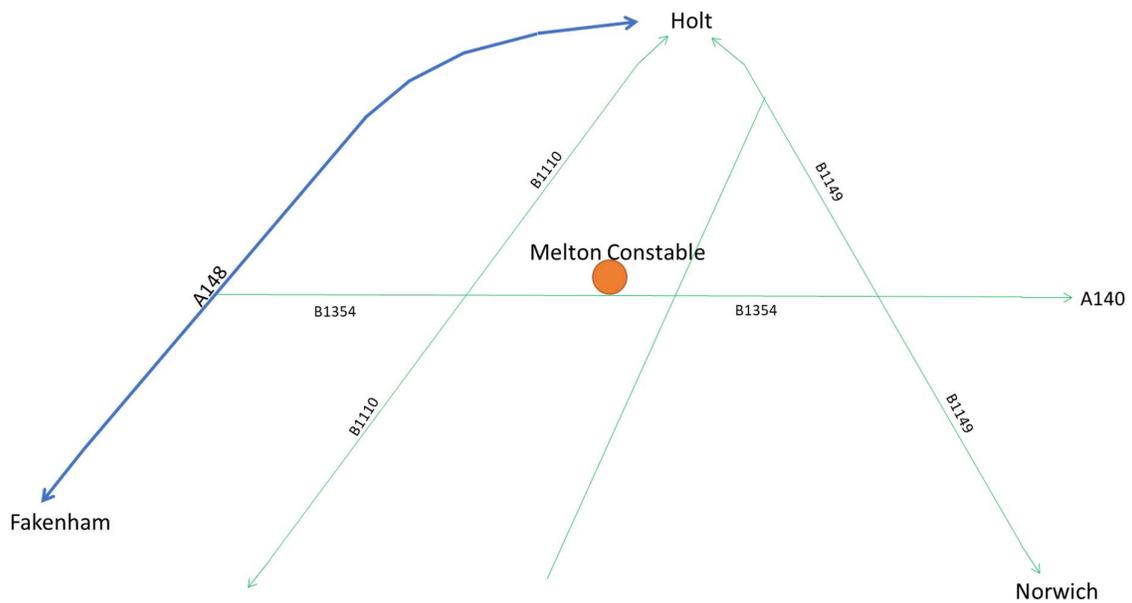
The key lines on the rail network in Norfolk primarily run North to South from Kings Lynn and Norwich towards Cambridge and Ipswich then onto London respectively. This is supplemented by East to West services, but south of North Norfolk’s boundaries.

The only line in the authority area is that from Sheringham and Cromer via North Walsham to Norwich, which is broadly hourly throughout the working day typically taking 57, 49 and 28 minutes respectively. The only attractively commutable town by train to Norwich is North Walsham, although some may still travel from beyond it is likely that the convenience and journey time of the car would be generally more competitive and attractive from Cromer or Sheringham as the road is more direct and quicker, particularly from Cromer.

Currently Holt, Fakenham, Tattersett and Melton Constable, as other locations under consideration in this study have no direct access to rail facilities, although buses do link at key times along the principal road corridors, but offer no journey time advantage over the car and are therefore primarily used by those with little or no access to a car.

The next section of this report provides some commentary on access to key towns and locations with employment potential in this study;

Melton Constable

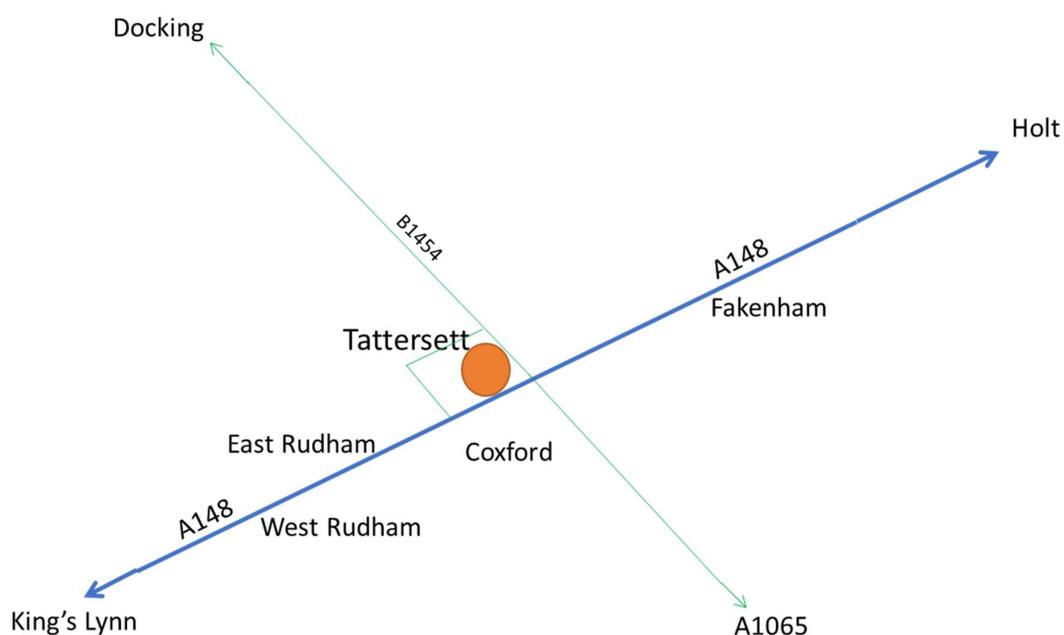


Melton Constable is situated east of the A148, along the B1354, between Holt and Fakenham. There is no rail network within the surrounding area with the nearest train station being located around 12 miles away in Sheringham. With a car Melton Constable is well placed to in order to access services and facilities in both Holt and Fakenham due to the close proximity to the A148 which is the main A road that runs from Kings Lynn to Fakenham and then onto Holt and Cromer. While Melton Constable is well placed to make great use of the road network there are very few bus services running through the area. However, although the bus services are limited the bus routes connect the area to Fakenham, Holt and Norwich City Centre (see bus table below).

Bus Route Number	Bus Journey	Bus Operator
------------------	-------------	--------------

9	Fakenham - Holt - Sheringham	Sanders Coaches
45	Holt - Melton Constable - Briston - Corpusty - Felthorpe - Reepham Road - Norwich City Centre	Sanders Coaches
45A	Norwich City Centre - Reepham Road - Felthorpe - Corpusty - Briston - Melton Constable - Holt	Sanders Coaches
302	Swanton Novers - Melton Constable - Briston	Sanders Coaches
609	Melton Constable - Briston - Wood Dalling - Reepham	Sanders Coaches

Tattersett

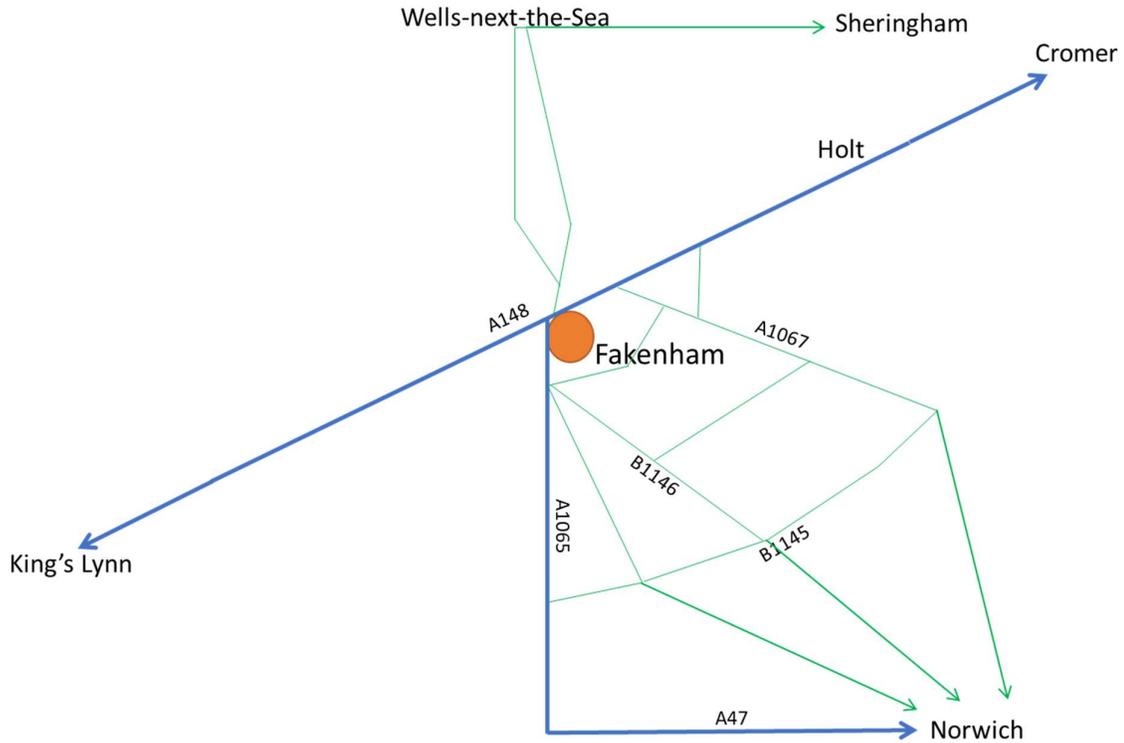


Tattersett is located on the A148, between Fakenham and Kings Lynn. Similar to Melton Constable there is no rail network that runs directly through the area with the nearest train station being located around 17 miles away in Kings Lynn. The strategic location of the area suggests that it will be heavily reliant on the surrounding road network due to the lack of rail facilities. However, while the area has accessibility to the road network there is a lack of bus services. While there are some bus services connecting Tattersett to other areas in Norfolk, the services are limited to Fakenham and Kings Lynn (see bus table below), isolating the area from major cities such as Norwich.

Bus Route Number	Bus Journey	Bus Operator
22	Go To Town - Raynham - Kipton – Fakenham West	Norfolk Community Transport
27	Fakenham - The Creakes - Syderstone (Circular)	Sanders Coaches
48	King's Lynn - QE Hospital - Gayton - Grimston (- Fakenham)	Lynx
49	King's Lynn - Hillington - The Rudhams – Fakenham	Lynx

49A	Fakenham - The Rudhams - Gayton - King's Lynn	Lynx
49A	Fakenham High School - King's Lynn West	Norfolk Community Transport

Fakenham

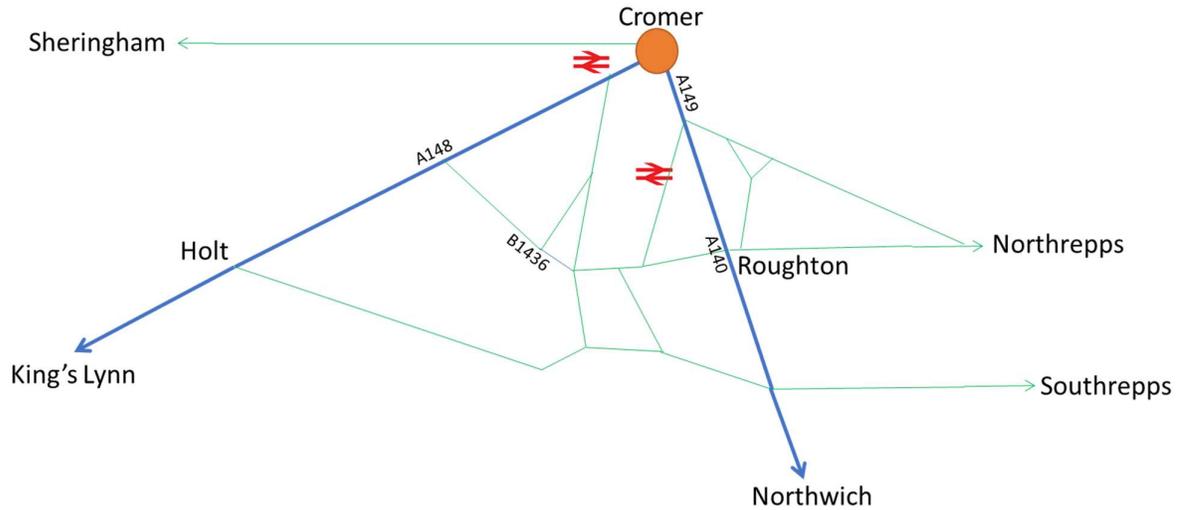


Fakenham is located on the A1065, south of the A148. The area is isolated from the county's rail network with the nearest train stations being located in Holt around 17 miles away and Kings Lynn around 22 miles away. While the location of the area suggests that it will be heavily reliant on the surrounding road network due to the lack of rail facilities, Fakenham is strategically placed near A roads which connect to Cromer, Norwich and Kings Lynn. Fakenham is strategically well located and has a number of bus services which connect the area to a variety of places across the county including Holt, Kings Lynn and Norwich.

Bus Route Number	Bus Journey	Bus Operator
9	Fakenham - Holt – Sheringham	Sanders Coaches
21	Fakenham - North Elmham – Dereham	Konectbus
22	Go To Town - Raynham - Kipton – Fakenham West	Norfolk Community Transport
24	Fakenham - Barney - Hindolveston - Reepham – Norwich	Sanders Coaches
25	Fakenham - Colkirk - East Bilney - Gressenhall – Dereham	Sanders Coaches
27	Fakenham - The Creakes - Syderstone (Circular)	Sanders Coaches
28	Fakenham Town Service	Sanders Coaches

29A	Go To Town - Fakenham - Easton College West	Norfolk Community Transport
36	Coastliner - King's Lynn - Hunstanton - Burnham Market - Wells-next-the-Sea – Fakenham	Lynx
48	King's Lynn - QE Hospital - Gayton - Grimston (- Fakenham)	Lynx
49	King's Lynn - Hillington - The Rudhams – Fakenham	Lynx
49A	Fakenham - The Rudhams - Gayton - King's Lynn	Lynx
49A	Fakenham High School - King's Lynn West	Norfolk Community Transport
98	Foulsham - Reepham - Hindolveston - Barney – Fakenham	Sanders Coaches
309	Stibbard - Fulmodeston - Barney - Kettlestone – Fakenham	Sanders Coaches
315	Wells - Burnham Market - North Creake - South Creake – Fakenham	Sanders Coaches
X29	Norwich - Hellesdon - Taverham – Fakenham	First Norfolk & Suffolk

Cromer

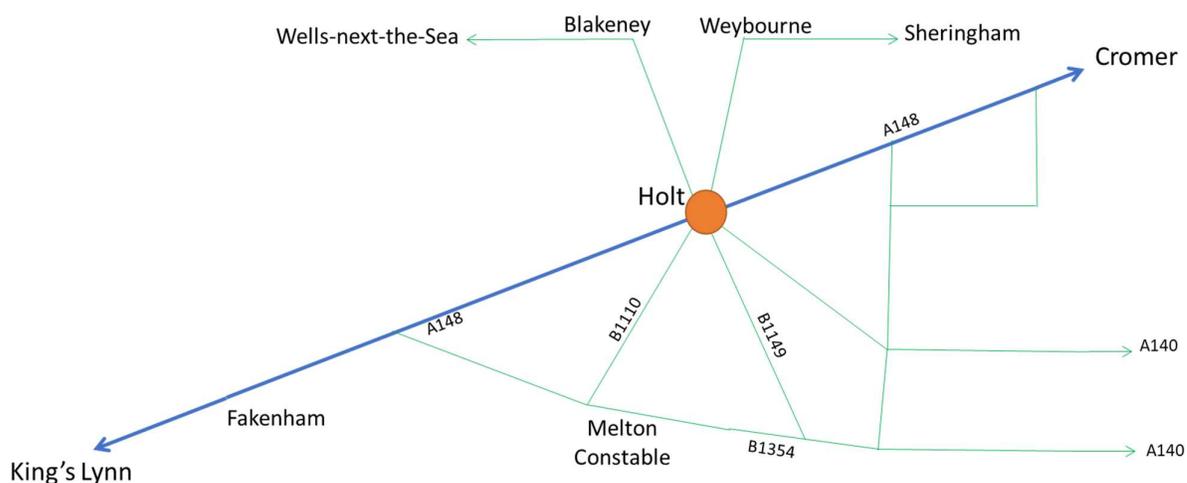


Cromer is located at the northern end of the county, situated along the coast with direct connections to the A148, A149 and A140. The area is served by two rail stations, one located in the centre and one located in Roughton, around 1 mile away. Cromer is well placed to make use of the nearby A roads which connect the area to Kings Lynn and Norwich with ease. As suspected, there are a number of bus services connecting Cromer to other areas in the county including North Walsham, Holt and Norwich (see table below), most likely due to the variety of roads which serve the area.

Bus Route Number	Bus Journey	Bus Operator
5	Sheringham to Cromer	Sanders Coaches
6A	Cromer to North Walsham	Sanders Coaches
16	Cromer to Gresham to Holt	Sanders Coaches
17	Cromer Gresham Sheringham	Sanders Coaches
18	North Walsham to Aylsham to Cromer	Sanders Coaches
19	Comer Gresham Sheringham Holt	Sanders Coaches

20	Cromer Gresham Holt	Sanders Coaches
33	North Walsham Southrepps Northrepps Cromer	Our Bus
35B	Swafield Mundesley Overstrand Cromer	Sanders Coaches
44A	Sheringham Cromer Aylsham Norwich	Sanders Coaches
79	Gresham Cromer	Sanders Coaches
CH1	Coasthopper Wells next the Sea Sheringham and Cromer	Sanders Coaches
CH2	Coasthopper North Walsham Cromer	Sanders Coaches
X40	Sheringham Cromer Norwich	Sanders Coaches
X44	Sheringham Cromer Aylsham Norwich	Sanders Coaches

Holt

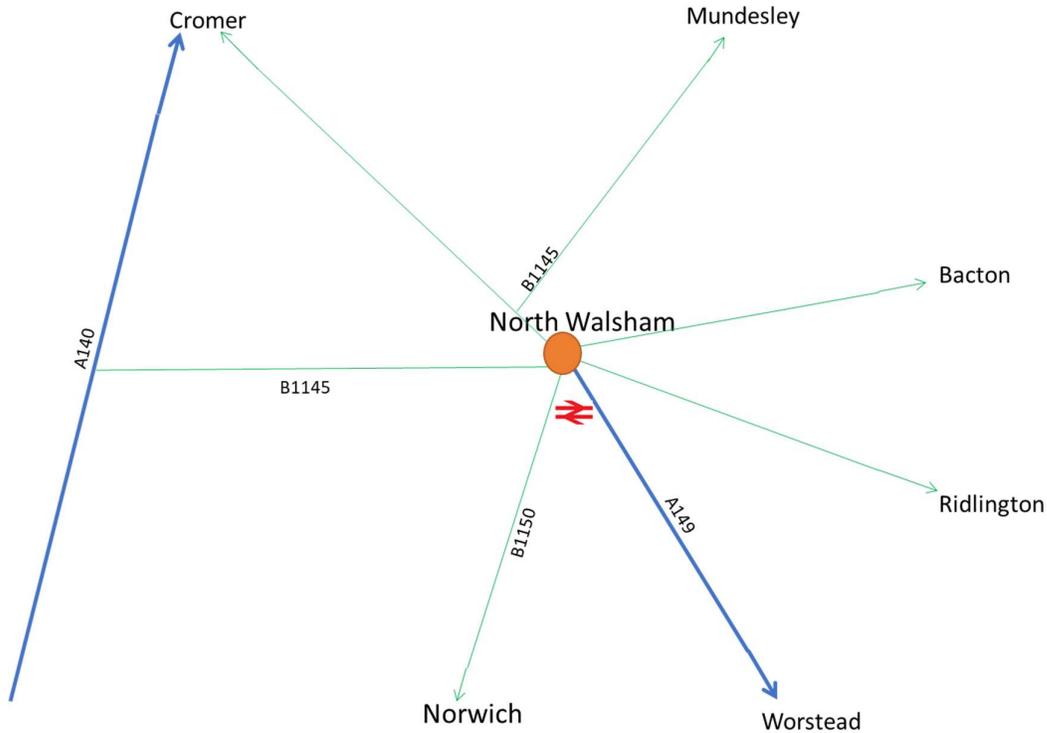


Holt is located on the A148 between Cromer and Fakenham. As a result of the area not having direct access to the rail network, the nearest train stations are located in Cromer, 10 miles away, and Sheringham, 7 miles away. The location of the area, situated on an A road, allows the area to be connected to Cromer and Kings Lynn with ease. Although Holt is not directly served by a rail network, the bus services provided allows the area to connect to the wider county, to places including Cromer, Fakenham and Norwich (see bus table below).

Bus Route Number	Bus Journey	Bus Operator
5	Sheringham to Cromer	Sanders Coaches
9	Fakenham - Holt – Sheringham	Sanders Coaches
16	Cromer to Gresham to Holt	Sanders Coaches
19	Cromer Gresham Sheringham Holt	Sanders Coaches
20	Cromer Gresham Holt	Sanders Coaches
43	Reepham - Aylsham - Newton St Faith - Hellesdon – Norwich	Sanders Coaches
44	Holt – Sheringham	Sanders Coaches
45	Holt - Melton Constable - Briston - Corpusty - Felthorpe - Reepham Road - Norwich City Centre	Sanders Coaches
45A	Norwich City Centre - Reepham Road - Felthorpe - Corpusty - Briston - Melton Constable – Holt	Sanders Coaches
46	Holt Circular - Wells-next-the-Sea - Langham - Blakeney - Cley - Glandford – Holt	Sanders Coaches

56	Sheringham - Holt - Aylsham - Norwich - Easton College	Sanders Coaches
102	Holt Primary School – Edgefield	Sanders Coaches
204	Holt - Letheringsett - Binham - Wighton – Wells	Sanders Coaches
402	Holt - High Kelling - Bodham – Sheringham	Sanders Coaches
607	Holt - Hunworth - Briston - Wood Dalling – Reepham	Sanders Coaches
610	Holt - Edgefield - Corpusty - Cawston – Reepham	Sanders Coaches

North Walsham



North Walsham is located to the east of A140 and is centrally located on a number of A and B roads including:

- A149
- B1145
- B1150

Access to these roads provides connections to areas such as Norwich, Cromer and Mundesley. The area is served by one rail station which is located south to the centre, between the B1150 and A149 connecting the area by rail to Norwich. Even though North Walsham is situated to the east of the county it is strategically well placed with close proximity to Norwich and connections to Cromer. As well as having access to the rail network, North Walsham has direct bus services to a variety of locations across the county, connecting the area to Cromer and Norwich (see bus table below).

Bus Route Number	Bus Journey	Bus Operator
1	North Walsham - Worstead - Swanton Abbott - North Walsham	Feline Executive Travel

2	North Walsham - Colby – Aldborough	Feline Executive Travel
5	Sheringham – Cromer	Sanders Coaches
5A	North Walsham – Norwich	Sanders Coaches
6	North Walsham - Stalham - Potter Heigham - Caister - Great Yarmouth	Sanders Coaches
6A	Cromer - North Walsham	Sanders Coaches
18	North Walsham – Aylsham – Cromer	Sanders Coaches
18A	North Walsham - Aylsham – Gresham	Sanders Coaches
33	North Walsham - Southrepps - Northrepps – Cromer	Our Bus
33A	North Walsham Town Service	Our Bus
34	Stalham - Hickling - Sea Palling - Happisburgh - Bacton - Mundesley - North Walsham	Sanders Coaches
55	North Walsham - Coltishall – Norwich	Sanders Coaches
88	North Walsham – Aylsham	Sanders Coaches
210	North Walsham - Swanton Abbott - Buxton - Freetenham – Norwich	Sanders Coaches
837	North Walsham - East Norfolk Sixth Form Centre	Sanders Coaches
CH2	Coasthopper - North Walsham – Cromer	Sanders Coaches
X6	North Walsham - Ormesby - Caister - Great Yarmouth (- Gorleston)	Sanders Coaches
X55	North Walsham - Coltishall – Norwich	Sanders Coaches

Cross Comparison of Areas

The table below shows a cross comparison between the areas of the proposed employment sites. It highlights the need for further access routes to certain areas which are lacking access to rail and bus facilities and a cycling network.

Place	Strategic Road Network connecting to A Roads	Access to Rail Network	Access to Bus Service to Kings Lynn	Access to Bus Service to Norwich	Direct / Easy Connection to Kings Lynn	Direct / Easy Connection to Norwich	Access to Cycle Route
Fakenham	✓	✗	✓	✓	✓	✗	✓
Holt	✓	✗	✗	✓	✓	✗	✓
Cromer	✓	✓	✗	✓	✓	✓	✓
North Walsham	✗	✓	✗	✓	✗	✓	✗
Tattersett	✓	✗	✓	✗	✓	✗	✗
Melton Constable	✗	✗	✗	✓	✓	✗	✗

Summary of Strategic Access

It is clear that Fakenham and Holt are well placed, centrally to the authority area and for links beyond, benefiting on being on the core route to Kings Lynn and beyond.

Cromer benefits by being on that route and having links to Norwich by both road and rail, albeit the latter having a relatively uncompetitive journey time.

North Walsham has a core benefit of attractive linkage to Norwich by train, but being relatively central to a wider local catchment within North Norfolk. It has challenges due to the impact of through traffic and in particular the impact of railway bridges in and around the town centre, creating constraints on movement.

It is felt that from a strategic access perspective development along the established Kings Lynn-Cromer corridor plus taking more advantage of the North Walsham location to strengthen rail services along the whole Norwich-Sheringham line are key opportunities in relation to employment site location.

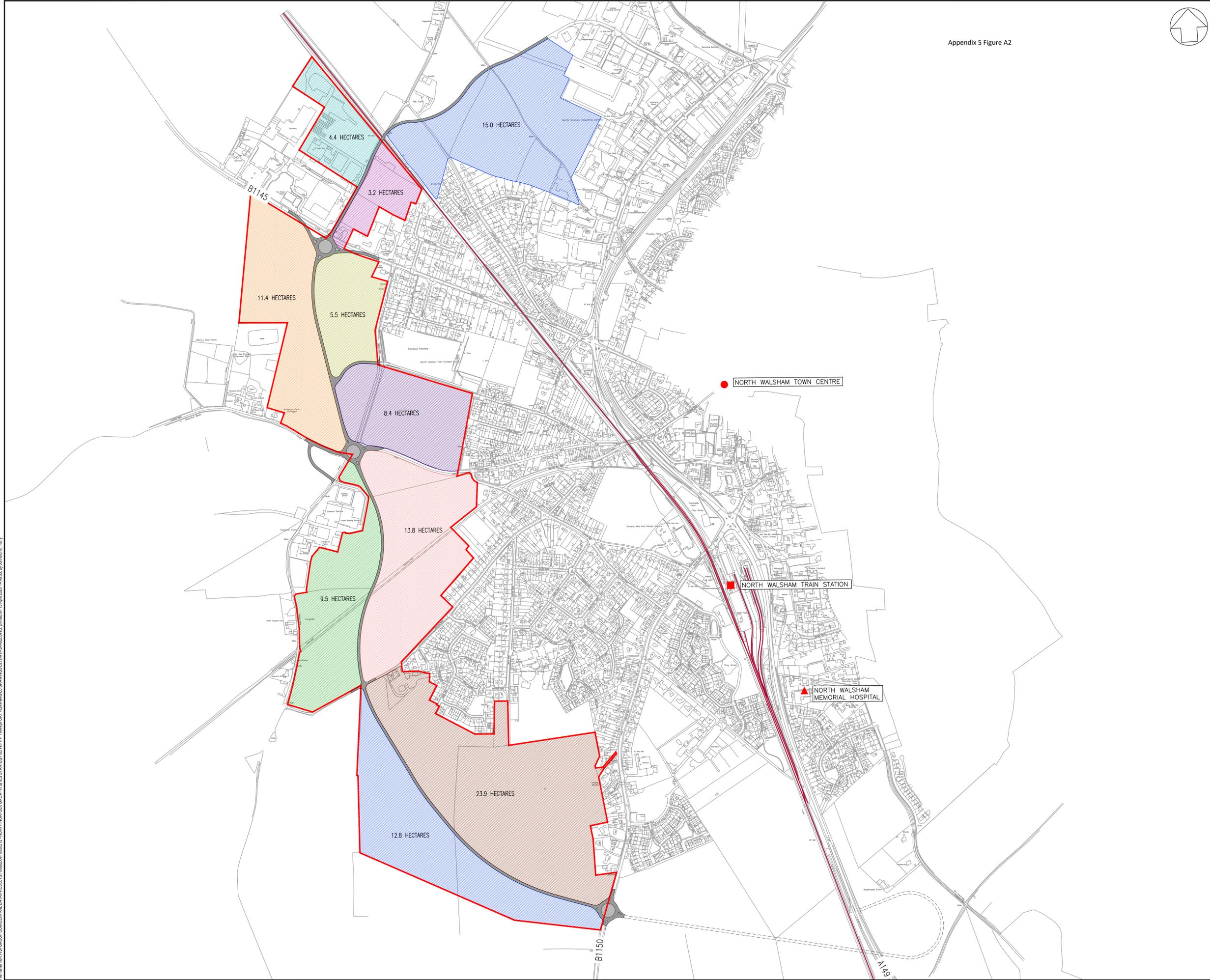
APPENDIX 5



DO NOT SCALE

Appendix 5 Figure A2

- KEY
- HOUSING GROWTH AREA BOUNDARY
 - = TRAIN TRACKS



REV	DATE	BY	DESCRIPTION	CHK	APP
P01	01/01/1901	XXX	FIRST ISSUE	XXX	XXX

DRAWING STATUS: **S0 - WORK IN PROGRESS**



1st Floor, Exchange Station, Liverpool, L2 2QP, UK

CLIENT:

ARCHITECT:

SITE/PROJECT:

TITLE:
**NORTH WALSHAM LINK ROAD
HECTARAGE PLAN**

SCALE @ A1: 1:5000	CHECKED:	APPROVED:
PROJECT NO:	DESIGNED:	DRAWN: DATE April 20

DRAWING NO: NORTH WALSHAM LINK ROAD	REV: P01
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File name: \\UK.VSPGROUP.COM\CENTRAL_DATA\PROJECTS\109620\109620 - NORTH NORFOLK GROWTH SITES STRATEGY\03 WIP\TP TRANSPORT PLANNING\03 DRAWINGS\02 NWS\04-02.DWG, printed on 15 April 2020 14:48:35, by johnstone, bary

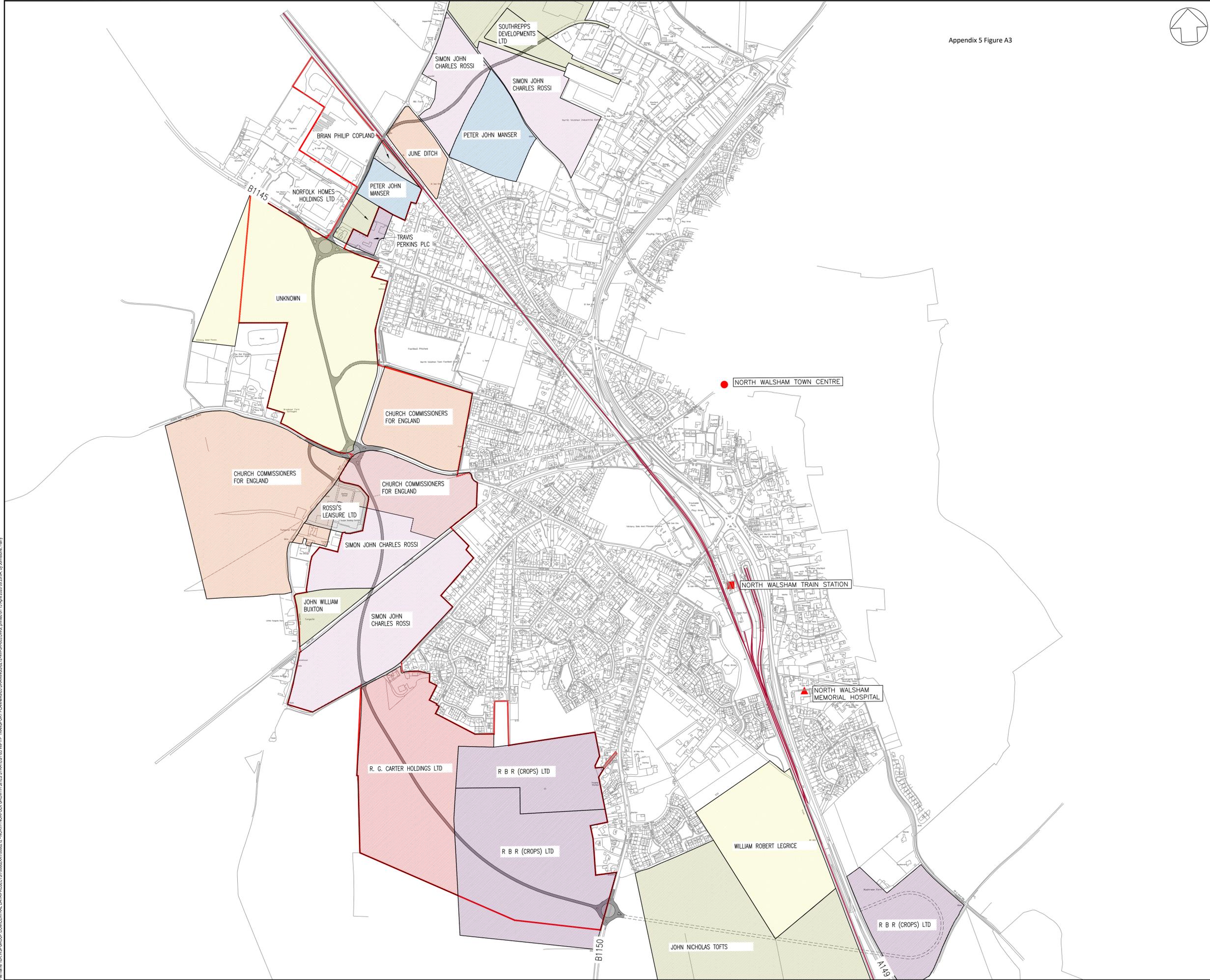


DO NOT SCALE

Appendix 5 Figure A3

KEY

- HOUSING GROWTH AREA BOUNDARY
- = TRAIN TRACKS



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**NORTH WALSHAM LINK ROAD
LAND OWNERSHIP PLAN**

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PROJECT NO:	DESIGNED:	DRAWN: DATE April 20

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APPENDIX 6

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Appendix 6 Figure A4



File name: I:\UK\WSPGROUP\COMCENTRAL DATA\PROJECTS\700662\70066212 - NORTH NORFOLK GROWTH SITES STRATEGY\03 WIP\TP TRANSPORT PLANNING\03 DRAWINGS\6212-NW-SK-004.DWG, printed on 19 March 2021 10:58:15, by Johnstone, Henry

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Appendix 6 Figure A5



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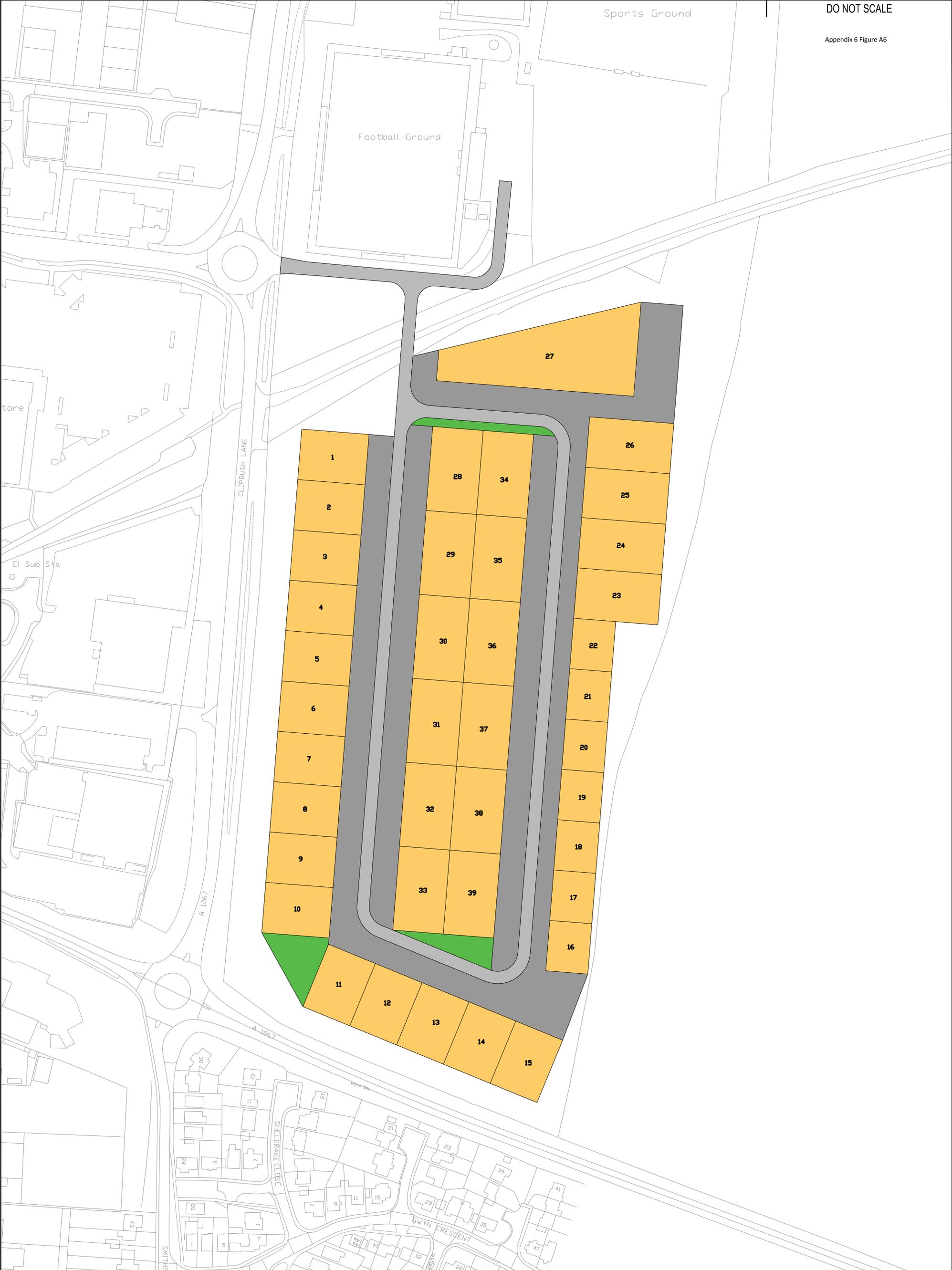
TITLE:

SCALE @ A2: NTS CHECKED: KR APPROVED: KR

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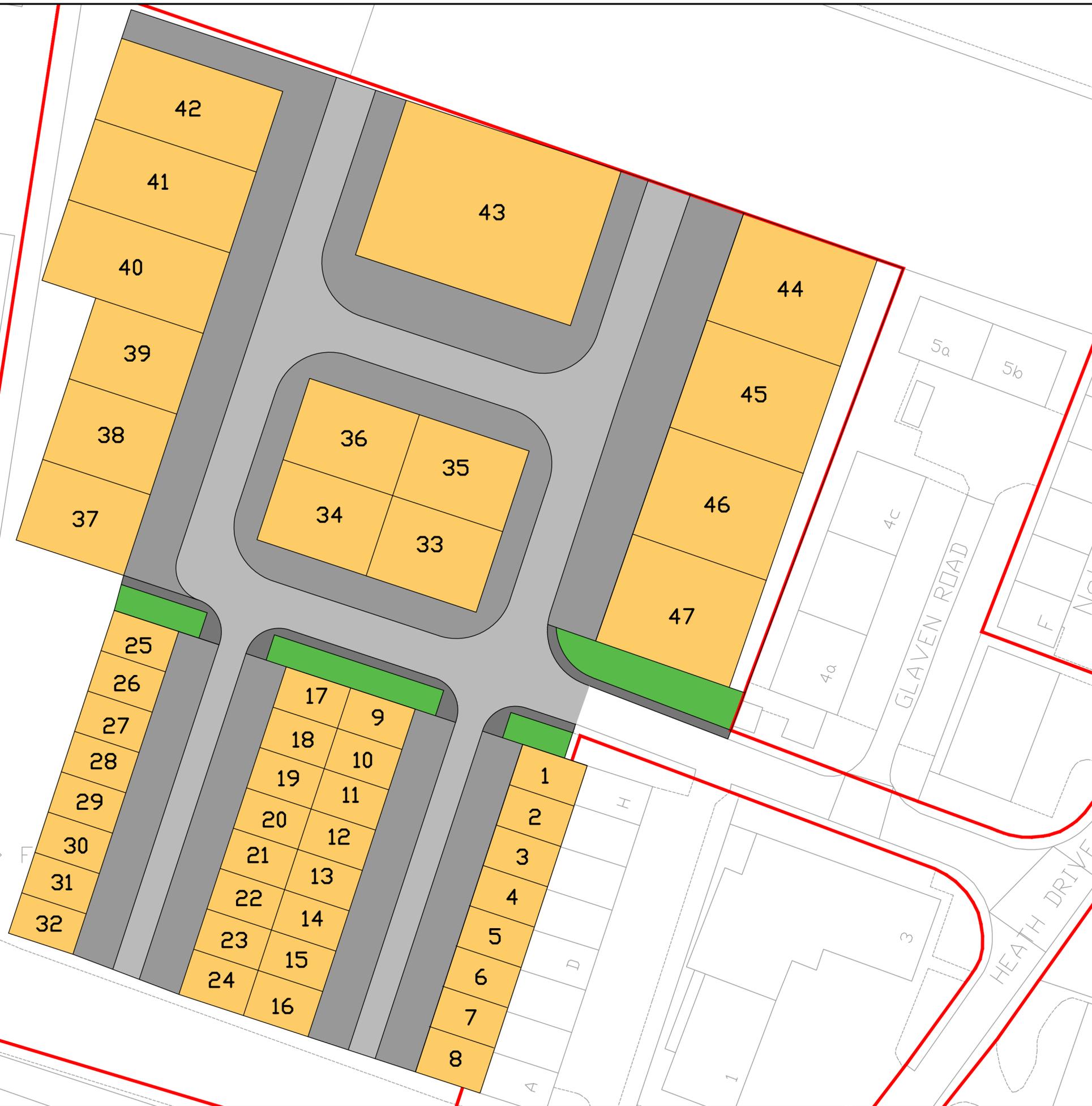
CLIENT:	PROJECT:
ARCHITECT:	TITLE:

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Appendix 6 Figure A7



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PROJECT: NORTH NORFOLK SITES GROWTH STRATEGY

TITLE:

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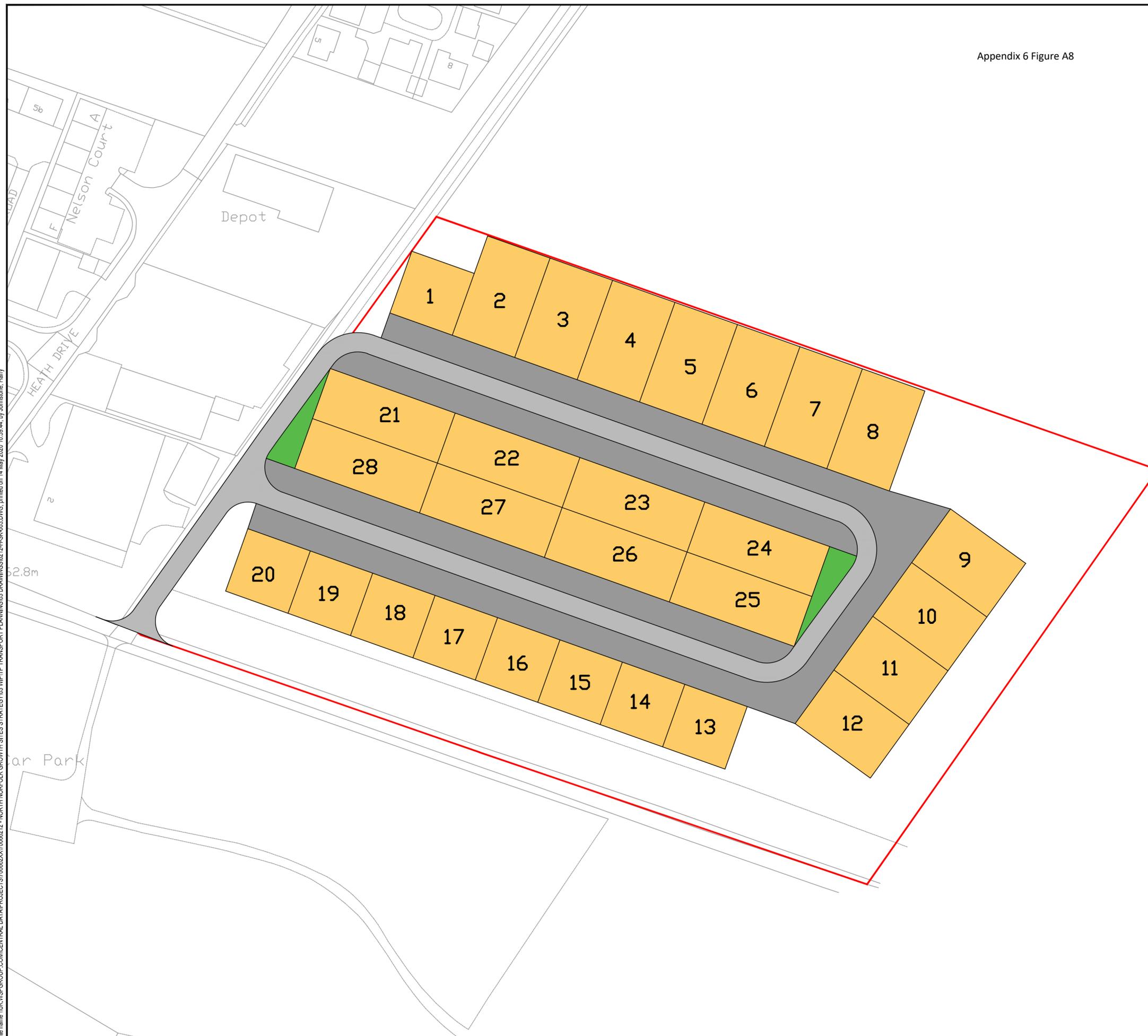
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Appendix 6 Figure A8



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TITLE:

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