

Employment Land Assessment

Cheltenham Borough Council, Tewkesbury Borough Council and Gloucester City Council

Final Report

October 2026

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EXECUTIVE SUMMARY

Introduction

i) This report provides an Employment Land Assessment (ELA) for the Boroughs of Tewkesbury and Cheltenham and the City of Gloucester for the Strategic and Local Plan (SLP) that is being prepared for the area. It provides an assessment of E(g)/B-Class employment sites and areas across the SLP Area and makes recommendations on how these can meet the employment needs of the three authorities for the 20-year period to 2045/46. It has been carried out on behalf of the three Councils by consultants BE Group.

Methodology

ii) The ELA includes:

- A Market Assessment of demand for employment land and premises analysing socio-economic data on sectoral change and transactional/vacancy data, along with engagement with property market professionals
- An Assessment of Employment Sites, reviewing the existing pipeline, and future supply of employment land which can meet both present demand and future needs, in the SLP Area. Work included site visits, reviews of planning consents, physical constraints and past sales/lettings on sites, via the Nimbus database and utilising Valuation Office (VOA) data. Landowners, developers and their agents were interviewed to identify plans for change
- Conclusion and Strategy – Provides a series of economic development recommendations and realistic conclusions about the existing/future supply of employment land in the study.

iii) The methodology follows Planning Practice Guidance on employment land reviews.

Policy and Strategy

iv) The study has been undertaken in line with both the National Planning Policy Framework (2026) and relevant Planning Practice Guidance.

v) The 2020 Use Classes Order Amendment combines the B1 Office/Research/Light Industrial Uses along with the A and partly D1/ D2 uses into a single ‘E’ Use Class. For the SLP Area, the practical effects of this are likely to include some greater pressure to convert town centre offices to other uses, although the market for many of those

alternative uses is suppressed at this time. The Use Class change has no spatial considerations and therefore will apply outside of town centres as well. It thus has the potential to result in the introduction of non-office/non-industrial type activities, including retail, in out of centre business parks, and industrial estates, although this is a trend which has been ongoing for some time and can, in moderation, beneficially diversify local economic activity.

vi) Large scale conversions of office and industrial uses are unlikely in modern industrial estates/business parks which are well occupied, still meeting business needs and generating a reasonable return for owners.

vii) The Joint Core Strategy (JCS) for the SLP Area identifies a requirement for 35,175 new homes and a minimum of 192 ha of B-class employment land to support approximately 39,500 new jobs. The JCS proposed that at least 84 ha of the 192 ha employment land requirement would be delivered on the Strategic Allocations, to 2031. The Allocations are:

- Policy A1: Innsworth and Twigworth – 9.1 ha of employment land and 2,295 homes
- Policy A2: South Churchdown – 17.4 ha of employment land and 1,500 homes
- Policy A3: North Brockworth – 3.0 ha of employment land and 1,100 homes
- Policy A4: North West Cheltenham – 23.4 ha of employment land and 4,285 homes
- Policy A5: Ashchurch – 14.3 ha of employment land, no homes
- Policy A6 Winneycroft – No employment land, 620 homes
- Policy A7 West Cheltenham (Golden Valley) – 45.0 ha of employment land and 1,100 homes.

viii) The adopted local plans of the SLP Area authorities identify the following additional supply to meet identified needs:

- Cheltenham – The Cheltenham Plan (2020) identifies seven sites to be safeguarded for employment purposes and allocates four other locations for new employment development. Four mixed use locations are also identified for mixed use development, two of which could provide E(g)/B-Class uses.
- Gloucester – The Gloucester City Plan 2011-2031 (2023) identifies four mixed use locations which could provide E(g)/B-Class employment (although none ultimately have available E(g)/B-Class employment land, as is discussed in this study)
- Tewkesbury – The Tewkesbury Borough Plan 2011 – 2031(2022) identifies 10 ‘Major Employment Sites’ (developed business parks/industrial estates) with 11.64

ha of available expansion land. It also identifies 14 locations as 'Rural Business Centres', along with 13.7 ha of additional employment land in these centres.

ix) Local, sub-regional and national policy documents and studies reference nine of key industrial sectors, relevant to the SLP Area:

- Advanced Manufacturing
- Clean Energy
- Creative Industries
- Defence
- Digital and Technologies (ICT)
- Financial Services
- Life Sciences
- Professional and Business Services
- Agri-Tech.

Employment Land Needs

The Gloucestershire HENA identifies employment land needs, for the period 2026-2046, for the SLP Area of:

- **Industrial – 612,636 sqm or 153.18 ha (gross) in the SLP Area**
- **Offices – Between 99,636 sqm and 187,455 sqm, or 22.27 and 37.45 ha.**

Combined: 175.45-190.63 ha or 712,272-800,091 sqm

Findings

x) **Sectoral Strengths** – Manufacturing remains a key part of the SLP economy, employing 18,700 people in 655 firms. Manufacturing employment is focused in Tewkesbury with 10,850 recorded jobs, 58.0 percent of the total, in 290 firms, with concentrations along the M5 Corridor. In terms of manufacturing sub-sectors, Tewkesbury has a strength in aerospace manufacturing (3,500 jobs in 2024), hosting several large aerospace as well as the Gloucestershire Airport. Gloucester and Cheltenham have strengths in manufacturing of machinery and equipment and metal products, although Gloucester also has a large number of food production jobs (600).

xi) Transport and storage employed 4,420, across the SLP Area, in 2024 in 435 firms. Almost half of that employment (2,150) is in Tewkesbury while transport and storage has a limited role in Cheltenham. This will reflect the fact that Gloucester and Tewkesbury have more

direct links to the M5 and major A-Roads such as the A38. Despite some modest, recorded jobs losses, most notably in Cheltenham, Construction is a key sector across the SLP Area, employing 8,450 in 1,985 businesses.

xii) The office economy of the SLP Area is extensive, employing 50,682 and accounting for nearly half of all businesses (5,235). It is largest in Cheltenham, with 22,782 people employed in 2,435 companies. Within the wider office economy, Professional, Scientific and Technical is the largest sector by job numbers employing 15,875 in the SLP Area in 2024. Information and Communication is focused in Cheltenham with 5,350 jobs or half the total for the SLP Area, in 480 businesses. Finance and Insurance employed 2,000-2,500 in each authority, but is generally a sector in decline, by jobs numbers. In part this will reflect the closure of local retail banks as more financial services move online.

xiii) The nine Key Sectors identified above employed 62,810 people in 6,104 businesses as of 2024/2025. Overall, although there is some representation for all of the nine sectors in the SLP Area, the sub-region has clear strengths in Advanced Manufacturing (overlapping with Defence and including an aerospace cluster), Digital and Technologies (again overlapping with Defence and also forming the majority of 'Creative Industries' in the SLP Area) and Professional and Business Services. The latter two have a focus in Cheltenham while Advanced Manufacturing is focused in the Borough of Tewkesbury,

xiv) **Office Property Market** – Local office stock is well occupied, especially by premises numbers. Demand is for leasehold suites of less than 500 sqm, and particularly of 100-200 sqm. Cheltenham is the focus for demand in the SLP Area and, as highlighted, there is a lack of stock, particularly higher grade stock outside of a few town centre schemes. Outside of Cheltenham, Gloucester Business Park is the main focus for demand, with more limited local markets in Gloucester city and at Gloucestershire Airport. There is a rural office market across Tewkesbury which is supported by a range of smaller business parks and business centres, on main road locations.

xv) Development at West Cheltenham (Golden Valley) is expected to boost demand in the Digital and Technologies sector. Although this scheme will attract some larger inward investment, stakeholders report that companies in this sector tend to enter the Gloucestershire market as start-ups, only requiring offices of 1-6 desks (less than 100 sqm of floorspace) in multi-let scheme. However, they then expand quickly so a lot of

grow-on options are needed.

xvi) **Industrial Property Market** – Local industrial/warehouse stock is well occupied, especially by premises numbers. Demand is for leasehold industrial and warehouse premises up to 5,000 sqm. In Tewkesbury, requirements are frequently larger, in the 1,000-10,000 sqm range. The most desirable locations for new industrial and warehouse units include locations extending west on the A38, to Junction 12, M5 in Gloucester and Gloucester Business Park and Gloucestershire Airport in Tewkesbury. In Cheltenham, there is a general need to deliver more modern stock on sites with the best access to the M5 possible.

xvii) The Advanced Manufacturing sector specifically, requires modern, high grade light and general industrial stock. Such units may not be different in overall design from standard property (although the internal fit out may be more complex and expensive) but can have a need for power provision above standard. This may create needs for on-site power generation, or at least more direct access to power sources. Advanced Manufacturing inward investment requirements can extend up to 5,000-10,000 sqm and need space for future growth beyond that.

xviii) Demand for logistics premises increased significantly in 2025 across the South West. Against high demand, supply remains modest. Although demand is regional, and not particularly focused toward Gloucestershire there is still the opportunity to capture some of this growth in the SLP Area on good quality unconstrained sites with direct access to the M5, which can compete with other options along the motorway corridor.

xix) **Existing Employment Areas** – 67 Employment Areas have been assessed and graded A-E. Collectively they provide some 761.1 ha of primarily developed employment land and are well occupied.

xx) 40 areas (59.7 percent) were Graded C or D. This means they are active and successful employment locations, which should continue to be identified and protected for E(g)/B-Class uses in the SLP. It also means that while they may accommodate some large employers, the bulk of the stock, in terms of unit sizes, quality and location, primarily meets the needs local firms.

xxi) 12 Areas were graded B, three in Cheltenham, five in Gloucester and four in Tewkesbury. These are also good locations for marketing to inward investors but are likely to have a greater focus on meeting local needs. The nine areas graded A represent the highest quality prestigious, flagship business areas which are best able to compete in the regional and national market place. These areas already support a range of national (and international) businesses and would be best place to attract future strategic scale inward investment.

Existing Employment Land Supply

The realistically developable land supply in the SLP Area is **87.79 ha or 361,342 sqm in 23 sites.** By local authority area, the realistic supply comprises:

- **Cheltenham – 35.02 ha or 139,551 sqm at four sites**
- **Tewkesbury – 52.77 ha or 221,791 sqm at 19 sites.**

There is no readily available employment land in Gloucester City, however, this Study has identified some 24 ha of underused brownfield land within the Employment Areas which may support some growth.

xxii) **Existing Employment Land Supply –** The majority of available land, approximately 51.38 ha or 216,000 sqm is likely to be brought forward for industrial and warehouse uses. Only the JCS Allocations in, or on the edge of, Cheltenham (33.64 ha or 134,031 sqm) – North West (A4) and West Cheltenham (A7) – are likely to be developed to meet office needs, particularly in the Digital and Technologies (Cyber Security) and Defence sectors. The Masterplan that has been prepared for Golden Valley includes over 93,000 sqm (1 million sqft) of commercial floorspace of which a large proportion will be for office development. This will be alongside some industrial, warehouse and technical uses. In JCS site A1: Innsworth and Twigworth a 2.77 ha business park, is proposed for Grade A offices as design and build options. At their maximum extent these sites could meet the bulk of the office requirement, however, the scale of offices which will be delivered at these locations remains uncertain. There is also potential to develop further office development on employment sites allocated by the SLP.

xxiii) Within the mostly industrial/warehouse supply of Tewkesbury, some sites which might support high value uses, including Key Sectors and logistics, and identified areas of high market demand include:

- Policy A2: South Churchdown (2.81 ha net) – Limited in size but has the potential to support logistics and Advanced Manufacturing uses

- Policy A3: North Brockworth (10.44 ha net) – Likely to support the logistics sector
- Policy EMP1: Bamfurlong Industrial Park Extension, Churchdown/Staverton (4.43 ha net) – On the market as CGX Connect Business Park for 30,000 sqm of floorspace, at the heart of a key Advanced Manufacturing cluster north of Gloucestershire Airport
- Policy EMP2: Brockeridge Farm Business Centre Extension, Twyning (11.03 ha) – Now has consent for 33,329 sqm of warehousing premises on a strategic location close to Junction 1, M50
- Cleeve Business Park, Bishops Cleeve – 6.15 ha (net), in two sites, is available within the high value GE Aerospace facility
- Gloucester Business Park – 5.91 ha (net) is available in five sites, to allow the growth of this significant regional business park, which accommodates clusters of Advanced Manufacturing and Professional and Business Services/Financial Services companies.

Supply and Demand Considerations

Against an Objectively Assessed Needs (OAN) of 175.45-190.63 ha or 712,272-800,091 sqm (combined office and industrial needs), deducting this supply gives further requirements of:

87.66-102.84 ha or 350,930-438,749 sqm

Future Employment Sites

This Study has reviewed 40 Call for Sites submissions where B-Class employment uses are proposed, either individually or as one of several possible uses. These give a potential (net) supply of 682.90 ha. Of this:

267.02 ha (1.066 million sqm) is available in options graded A or B, which are judged to be of the highest value.

xxiv) **Future Employment Sites –** Within this, sites which would best support identified demand and sectoral growth are:

- 40.85 ha (net) in four A graded sites, located north and west of Gloucestershire Airport. These have capacity for 157,462 sqm. Accessible to both Gloucester and Cheltenham and building on a strong established cluster of Advanced Manufacturing businesses. Gloucestershire Airport is an identified focus of demand. Development here would likely be focused on industrial uses but there

could be scope for associated administrative offices.

- 106.93 ha (net) in three of the larger sites around Junction 10, M5. 427,920 sqm of capacity. While there is no existing business cluster here, these sites have the best links to the M5 Corridor of any options put forward as well as direct A-road links into Cheltenham. A development here would suit industrial and particularly logistics uses which need direct M5 access but again could support office options reflecting linkages to the Cheltenham market.

Recommendations

xxv) The key recommendations are:

- **Recommendation One –** It is recommended that future allocations of employment land, and development policy, seek to build upon and expand these established local clusters, as well as encouraging growth in manufacturing, logistics and office based industries more generally
- **Recommendation Two –** It is recommended that sites aimed at meeting office needs be focused towards Cheltenham in the first instance and Gloucester Business Park, Gloucester City Centre and Gloucestershire Airport. Demand is for offices in a mix of sizes, but particularly smaller suites and multi-occupancy facilities. If data centres are a possibility on sites, consideration will need to be given as to how their exceptional power needs could be met
- **Recommendation Three –** It is recommended that the SLP seek to provide unconstrained industrial sites, large enough to support units of up to 10,000 sqm, to meet local demand (larger for strategic requirements) in locations including Gloucester Business Park, around Gloucestershire Airport, and along the M5, A38 Corridors (A40, A4019 for Cheltenham). Consideration needs to be given to power supplies and how businesses with above average power needs can be accommodated
- **Recommendation Four –** The 61 Employment Areas graded A-D comprise functioning and well occupied business parks and industrial estates, it is recommended that they be protected in the SLP for E(g)/B-Class uses
- **Recommendation Five –** Together the 21 A/B graded areas are the highest value employment clusters in the SLP Area. It is recommended that these locations be strongly protected within the SLP for E(g)/B-Class uses. Additionally, opportunities to allow their growth, both by expanding the areas, infill development or the upgrading of existing stock should be encouraged

- **Recommendation Six –** Given the lack of existing employment land in Gloucester, it is recommended that SLP policy support regeneration and redevelopment plans within Employment Areas of the city which will deliver E(g)/B-Class premises particularly in the Bristol Road/A38 and Barnwood areas which already support substantial high value employment clusters
- **Recommendation Seven –** It is recommended that the current realistic employment land supply in the SLP Area be identified as 87.79 ha or 361,342 sqm in 23 sites. The outstanding requirement to be met is therefore 87.66-102.84 ha or 350,930-438,749 sqm**.** It is also recommended that land be allocated to meet this further need
- **Recommendation Eight –** Of the available supply, 51.38 ha or 216,000 sqm is likely to be developed almost exclusively for industrial/warehouse uses, leaving outstanding industrial land requirements of 101.8 ha or 396,636. It is recommended that other land be identified to meet this requirement. As noted, Gloucester Business Park, around Gloucestershire Airport, and along the M5, A38 Corridors (A40, A4019 for Cheltenham) are the recommended areas of search for new opportunities. The former two do have some existing supply, while there is little along the main road corridors
- **Recommendation Nine –** Strategic sites in Cheltenham are likely to meet the bulk of the office requirement, but some shortfall against OAN remains likely and it is recommended that other sites with office capacity are made available
- **Recommendation Ten –** Within the A-B graded potential future sites, recommended options to focus on are**:**
    - 40.85 ha (net) in four A graded sites, located north and west of Gloucestershire Airport – T3.2/T3.3 (CHU015/ CHU035): Parton Farm/ Evergreen Nurseries, Parton Road (Function as a single site), T3.5 (CHU039): Land at Gloucestershire Airport and T3.33 (DOW010): Land North of Ashville Business Park. These have capacity for 157,462 sqm. There are other B graded options in this area which could also be considered, as needed
    - 106.93 ha (net) in three of the larger sites around Junction 10, M5 - T3.7/ T3.8 (ELM011/ ELM003): Land NW of Junction 10 of M5 at Hardwicke/ Stanboro Nurseries (Function as a single site) and T3.12 (BOD013D): Land around Boddington (Site D). 427,920 sqm of capacity. Smaller sites here are again graded B.

1.0 INTRODUCTION

1.1 This report provides an Employment Land Assessment (ELA) for the Boroughs of Tewkesbury and Cheltenham and the City of Gloucester (the Joint Core Strategy/JCS Area or Strategic and Local Plan/SLP Area. N.B. for consistency with the most recent studies this sub-region will be referred to as the SLP Area). It provides an assessment of E(g)/B-Class employment sites and areas across the SLP Area and makes recommendations on how these can meet the employment needs of the three authorities for the 20-year period to 2045/46. It has been carried out on behalf of Cheltenham, Tewkesbury Borough Councils and Gloucester City Council (the councils, the local authorities). The ELA has been prepared alongside the Housing and Economic Needs Assessment (HENA) which considers the need for employment land in the SLP Area and across Gloucestershire.

1.2 BE Group, economic development and property consultants, completed this ELA. The Housing and Economic Needs Assessment was undertaken by Iceni Projects Ltd.

1.3 The outputs of this ELA will provide a key piece of evidence underpinning the preparation of the Strategic and Local Plan (SLP) of the three local authorities. The ELA will also feed into, and reflect, wider strategy and policy development work in the SLP Area, including the preparation of the Gloucestershire Local Growth Plan, and a future Strategic Plan pursuant to the Government's devolution proposals The Study was completed over January-July 2026.

Study Objective

1.4 "The overall purpose of the ELA is to identify a future supply of land which is suitable, available and achievable for economic development uses over the SLP period. The assessment will be an important source of evidence to inform plan-making and decision-taking." It will also provide "recommendations on the most appropriate vision and strategy for the delivery of employment land across the SLP period".

Methodology

1.5 The ELA comprised several stages:

- Market Assessment – Reviewed the current market demand for employment land and premises analysing socio-economic data on sectoral change and transactional/vacancy data, sourced from Nimbus. This quantitative data was

supported by engagement with property market stakeholders and public sector partners to provide a full picture of the market in the SLP Area

- Assessment of Employment Sites – Reviewed the existing pipeline, and future supply of employment land which can meet both present demand and future needs, in the SLP Area. Work included analysis of developed employment areas and undeveloped sites through site visits, reviews of planning consents, physical constraints and past sales/lettings on sites, via the Nimbus database and utilising Valuation Office (VOA) data. Landowners, developers and their agents were interviewed to identify plans for change
- Conclusion and Strategy – Provided a series of economic development recommendations and realistic conclusions about the existing/future supply of employment land in the study, combined into a strategy for supporting growth in the SLP Area.

1.6 A list of those consulted is provided at Appendix 1.

Employment Land Review Guidance

1.7 Completion of the ELA has been informed by Practice Guidance (PPG), which provides guidance on how local authorities should approach both housing and employment land reviews. Two guidance notes were produced in 2014 and updated over 2018/19 – Housing and Economic Land Availability Assessment which provides a methodology of reviewing suitable land, and Housing and Economic Needs Assessments, which provides guidance on how future needs can be determined. A third PPG Effective Use of Land (2019) provides advice on assessing whether existing employment allocations should be protected or reallocated for a more deliverable use.

1.8 The assessment process takes the form of a five-stage methodology under the following headings:

- **Stage 1: Identification of sites and broad locations** to provide an audit of available land of 0.25 ha and above. This will be a review identifying as wide a range as possible of sites and broad locations for development (including those existing sites that could be improved, intensified or changed). Identification methods may include a public 'Call for Sites' exercised by the local authority. The outcome of this stage is to understand key employment land supply issues and generate a portfolio of potential employment sites to take forward for more detailed review.

- **Stage 2: Site and broad location assessment** to estimate the development potential. This will include a re-appraisal of the suitability of previously allocated land, and the potential to designate allocated land for different or a wider range of uses. This stage entails a qualitative review of all significant sites and premises for their 'suitability', 'availability' and 'achievability' in order to confirm which of them are unsuitable for/unlikely to continue in E(g)/B2/B8 employment use; to establish the extent of 'gaps' in the portfolio; and if necessary, identify additional sites to be allocated or safeguarded. This exercise will help to inform whether a site is 'deliverable', 'developable' or neither. In assessing the portfolio, factors which need to be considered include:
    - The best fit functional economic market area
    - The existing stock of land within the area - this will indicate a baseline for land in employment uses
    - The recent pattern of employment land supply and loss – for example based on extant planning permissions and planning applications (or loss to permitted development)
    - Market demand – sourced from market intelligence from local data and discussions with developers and property agents, recent surveys of business needs or engagement with business and economic forums including locational and premises requirements of particular types of business
    - Market signals – based on projected growth in the certain markets and demographic changes; and
    - Oversupply and evidence of market failure – such as physical or ownership constraints that prevent the employment site being used effectively.
- When considering whether there is a realistic prospect of an existing employment site being developed for its intended use, PPG Effective Use of Land suggests that the following factors be considered:
    - The length of time since the site was allocated in the development plan
    - The planning history of the site including any planning applications or pre-application enquiries
    - Whether there is evidence that the site has been actively marketed for its intended use for a reasonable period, and at a realistic price; and
    - Whether there are any changes of circumstance that mean that take-up of the site for its intended use is now unlikely.

- Where an alternative use for the allocated site is proposed, it will also be relevant to consider the extent to which evidence suggests the alternative use would address an unmet need, as well as the implications for the wider planning strategy for the area and other development plan policies.
- **Stage 3: Windfall assessment** Not applicable as relates to housing only.
- **Stage 4: Assessment review** ascertaining the need for economic development uses. To understand the future quantity of land required across the main business sectors; to provide a breakdown of that analysis in terms of quality and location and provide an indication of 'gaps' in supply through economic forecasting, consideration of recent trends and/or assessment of local property market circumstances. The quantitative assessment of needs was completed in the HENA, and this ELA supports that with "consultation with relevant organisations, studies of business trends, and monitoring of business, economic and employment statistics."

  Needs can be compared against supply to identify the likely 'gaps' in supply that need to be filled, across the principal market segments covering the SLP period.
- **Stage 5: Final evidence base**, the outcome of which will be the completion of the ELA and its associated strategy for growth, to be taken forward in the SLP. The ELA is prepared in line with this advice.

1.9 Table 1 **– Employment Land Reviews – PPG Guidance**shows how the ELA aligns with this Guidance. The link between the report and the PPG methodology is not always clear cut, with different sections overlapping, indeed certain steps overlap.

Table 1 – Employment Land Reviews – PPG Guidance

Stage 1 – Site / Broad Location Identification	
Determine assessment area and site size	Undertaken by the councils
Desktop review of existing information	Review of the policy position, socio-economic position, local/sub-regional property market and the baseline land supply (Covered in Sections 2-7)
Call for sites / broad locations	Call for Sites exercises completed internally by the councils.
Site / broad location survey	Review of available employment sites and future options for growth. (Covered in Sections 5-8 and Appendices)
Stage 2 – Site / Broad Location Assessment	
Estimating the development potential in parallel with assessing suitability, availability, achievability – including viability	Covered in Sections 5-8 and Appendices
Overcoming constraints	Covered in Sections 5-8 and Appendices
Stage 3 – Windfall Assessment	
Determine housing / economic development potential of windfall sites (where justified)	N/A
Stage 4 – Assessment Review	
Review assessment and prepare draft trajectory; enough sites / broad locations?	Covered in Sections 5-9 and Appendices. Informed by HENA
Stage 5 – Final Evidence Base	
Step 12 – Evidence Base and monitoring	ELA produced by BE Group, HENA produced separately and monitoring undertaken by the councils

Source: BE Group, 2026

2.0 STRATEGIC AND POLICY CONTEXT

Introduction

2.1 This section focuses on national, sub regional and local reports and strategies that measure supply and demand, for employment land in the SLP Area. More general strategic policy is not reviewed unless it has specific relevance to sites or key aspects of the local property market.

National Planning Policy

2.2 This sub-section considers national policy, relevant to the completion of this Employment Land and Premises Study. Planning Practice Guidance, relevant to Employment Land Studies was considered in Section 1.0.

National Planning Policy Framework (NPPF), 2026

2.3 The framework set out planning policies for England and the ways in which they can be applied. This version replaces the previous NPPF published in December 2024.

2.4 The NPP introduction states that "the national decision-making policies in this Framework are a material consideration in making these decisions and should be read alongside the policies in the [Local Planning Authority's] development plan."

2.5 Chapter 7 'Building a Strong, Competitive Economy' has the objective "to enable businesses to invest, expand and adapt in a way that reflects the opportunities, challenges and characteristics of different areas, and supports long-term economic growth both locally and nationally." Policy E1: Providing the conditions for long-term economic growth, identifies the following actions which local development plans should take to support business investment and employment. Such plans should:

a. Set out an economic vision and strategy, "which takes a positive, proactive and realistic approach to encouraging sustainable economic growth in both urban and rural areas, having regard to the Industrial Strategy and any relevant strategic and local strategies for economic development and regeneration." Such plans should consider "both local business needs and wider needs and opportunities for economic growth and investment including relevant market signals, priority places for investment in key sectors set out in the Industrial Strategy, and the location of

Industrial Strategy Zones and AI Growth Zones."

b. "Seek to address potential barriers to investment, such as inadequate infrastructure, services or housing…"

c. "Allocate sites to implement the economic vision and strategy and meet identified needs over the plan period, paying particular regard to facilitating development to meet the needs of a modern economy (including sites and premises which are flexible and adaptable) and the specific locational requirements of different sectors." This includes making provision for:

   i) Clusters for knowledge, creative or high technology industries

   ii) Logistics operations, of differing scales and in appropriate locations

   iii) The expansion or modernisation of other businesses to support economic growth. This includes leisure and tourism, agriculture and other rural and land-based businesses where these are important (Paragraph 1).

2.6 As businesses property requirements change over time, "development plans should not be overly prescriptive about the types of uses or unit sizes that would be acceptable on particular sites (other than where there is a clear and justified rationale for being specific about acceptable uses at the plan-making stage)" (Paragraph 2).

2.7 Policy E2: Meeting the need for business land and premises, notes that to support business growth "substantial weight" in planning decisions should be given to:

a) The economic benefits of proposals for commercial development

b) Benefits for domestic food production, animal welfare and/or the environment where proposals are for farm improvement (Paragraph 1).

2.8 Paragraph 2 states that where local policy requires a proposed new development to demonstrate that unmet market need exists, which it can fill, consideration should be given to whether:

a) Market signals indicate an undersupply of the proposed type of business land or premises, "taking into account the anticipated catchment area for the type of development proposed, the changing needs of different sectors and the availability of suitable existing land and buildings"

b) "The specific locational requirements of the proposal are met by existing allocations in the development plan."

2.9 Policy E3: Freight and logistics, indicates that proposals for freight and logistics development should:

a) Have good access to transport networks
b) Be sited and designed to limit environmental impacts, including the impacts on local residents
c) Provide sufficient parking for lorries or other vehicles (Paragraph 1).

2.10 Policy E4: Rural business development encourages the growth of rural businesses through:

a) "The conversion of existing buildings and well-designed new buildings
b) The development and diversification of agricultural and other land-based businesses
c) Facilities to support rural leisure and tourism and measures to retain and expand accessible local shops and services
d) Development to maintain and enhance farm viability and sustainability and support domestic food production..." (Paragraph 1).

2.11 "Development proposals to meet business needs in rural areas may need to be located outside settlements, and in locations that are not well served by public transport." In these circumstances:

a) Development proposals should, where possible, use previously developed land, and sites that link to existing development
b) The siting and design of development should have regard to the character of its surroundings.

2.12 Guidance for the use of land for employment, and other sites, is contained in Chapter 12 on 'Making Effective Use of Land.' Local Plan Policy should "promote the effective use of land in meeting the need for homes and other uses, while safeguarding and improving the environment and ensuring safe and healthy living conditions." It includes three policies:

- L1: Planning for an effective use of land – Development plans should focus development onto previously developed land, using land efficiency and promoting intensification of uses
- L2: Making effective use of land – Substantial weight should be given to development proposals which bring vacant, derelict, contaminated or underused land back into full use

- L3: Achieving appropriate densities – Development proposals should make efficient use of land, considering the identified need, the availability of infrastructure, a site's connectivity and the need to achieve well-designed, attractive and healthy places.

2.13 In particular L1: Planning for an effective use of land, Paragraph 1, C includes that Local Planning Authorities should not continue to allocate sites for a use "where there is no reasonable expectation that the use will come forward within the plan period."

Use Class Order Amendments, September 2020

2.14 As of September 2020, changes have been made to the Use Classes Order which mean that Use Classes A1, A2, A3 and B1 are now to be treated as Class E. The B1 class has been changed to E(g) and defined as " [Employment] Uses which can be carried out in a residential area without detriment to its amenity." E(g) is further separated into three sub-categories which reflect the previous a, b, c division of the B1 Use Class:

- E(g)(i): Offices to carry out any operational or administrative functions (former B1(a))
- E(g)(ii): Research and development of products or processes (former B1(b))
- E(g)(iii): Industrial processes. (former B1(c)).

2.15 Class D (Non-residential Institutions, and Assembly and Leisure) has also been redefined to newly introduced Classes E and F, with Class F comprising of Local Community and Learning premises. D1 is split out and replaced by the new Classes E(e-f) and F1. D2 is split out and replaced by the new Classes E(d) and F2(c-d) as well as several newly defined 'Sui Generis' uses, including:

- Pubs, wine bars and other drinking establishments (including those with expanded food provision) (Former A4)
- Hot food takeaways (Former A5)
- Live music venues
- Cinemas, concert halls, bingo halls and dance halls.

2.16 The residential (C classes), general industrial (B2) and storage and distribution (B8) use classes remain unchanged.

2.17 The E Class brackets together a wide variety of uses, all of which are now considered to

be in the same use class:

- Retail
- Restaurants
- Financial, professional, or other commercial services
- Publicly accessible indoor sport, recreation, or fitness
- Publicly available medical or health services
- Crèches, day nurseries and day centres
- Offices, including research and development
- Industrial uses which do not harm amenity.

2.18 Planning permission is not required for changes of use within the same use class, including the new E Use Class, unless local planning authorities create some locally specific restrictions in local policy (Article 4 Directions). This means that many types of business user will be able to change the uses of properties without seeking planning permission. For example, under the new use class order, a shop will be able to change to an office and then to a gym and back again, without planning permission. Amongst other impacts, this will make it more difficult for local planning authorities to monitor changes of use within local commercial premises as there is no longer an automatic requirement for property owners/occupiers to engage with councils when making now permitted changes.

2.19 In order to change the uses within a class, there must have been actual and lawful use (i.e. if the building is not being used or occupied for the use permitted under an existing planning permission, it will need to be brought into that use before it can then change to another use within Class E).

2.20 The government has said that the main driver of the changes has been the need to enable the repurposing of buildings on high streets and town centres. The new Class E allows for a mix of uses to reflect changing retail requirements. It will allow a building to be used flexibly by having several uses taking place concurrently or by allowing different uses to take place at different times of the day. The aim is for this to support the high street revival and allow greater flexibility to change uses within town centres without the need for planning permission.

2.21 The Government has also implemented separate changes to permitted development rights. These include allowing the demolition and rebuilding of single and detached vacant

and redundant office and light industrial buildings into dwellings, without planning permission subject to a number of restrictions and limitations set out in the General Permitted Development Order.

2.22 To implement this will require prior approval from the local authority prior to commencement of the development. This includes approval in respect of transport and highway matters, contamination risks, flood risk, the design of the new building, the external appearance of the new building, the provision of adequate natural light in all habitable rooms of the new dwellings, impact on amenity of the existing building and neighbouring premises including overlooking, privacy and loss of light, impact of noise from commercial premises on intended occupiers, impact upon heritage and archaeology, method of demolition of the old building, plans for landscaping, air traffic and defence asset impacts, and the impact on any protected vistas.

2.23 For the SLP Area, the practical effects are likely to include:

- Some impacts on the supply of town/city centre office stock, with some properties converted from office to retail, leisure and other town centre services. The demand for offices will vary across the SLP Area, however, many local retail and leisure markets continue to remain suppressed since the Covid-19 Pandemic and reflecting ongoing economic uncertainty, so the real impacts on the town/city centres of the SLP Area are likely to be modest.
- This new flexibility has no spatial considerations and therefore will apply outside of town centres as well. It thus has the potential to result in the introduction of non-office type activities, including retail, in out of centre business parks, which runs contrary to national and local planning policies designed to protect town/city centre retail. In Sections 5-7, this Study considers changes of use and losses of stock in the Employment Areas of Cheltenham, Gloucester and Tewkesbury to consider the impact of such policy .
- Some conversion of light industrial stock to retail/leisure uses is likely, on sites with good main road access, or in settlement locations, particularly as retail/leisure uses may be able to pay higher rents than traditional industrial and warehouse businesses. However, this continues existing trends which have seen uses such as gyms be accommodated on industrial estates. On a small scale such conversions can be welcome as they deliver useful services on local industrial estates, generate footfall outside of normal business hours, provide viable uses for older stock and

increase the attractiveness of estates to occupiers. Large scale conversions would have a significant impact on the stock available to meet the needs of industrial and warehouse businesses and create incompatibilities between uses (i.e., retail next to heavy industry) although in the short term, a depressed retail/leisure market makes extensive losses unlikely.

2.24 There will also be policy impacts as local plan policies which seek to protect specific uses in the town centre, or office space within designated areas, will no longer be up to date.

2.25 Landlords will also need to be particularly aware of the new arrangements when looking at leases and the extent of use that is authorised. Allowing too broad a permitted use could now result in undesirable changes of use within the scope of the lease, and landlords will not be able to fall back on the planning system to prevent such changes.

2.26 The changes will also have an impact on property valuation. For example, a property which has achieved a desirable change of use may now find that any such extant permission is unnecessary and does not result in an uplift in value. Similarly, there is likely to be a levelling-out of values for properties within the new use class, given the interchangeability of uses therein.

The UK's Modern Industrial Strategy (2025)

2.27 The UK Government's priority mission is to "deliver strong, secure, and sustainable economic growth to boost living standards for working people in every part of the UK. Growth will put more money in people's pockets, fund our public services, and revitalise our communities."

2.28 The modern Industrial Strategy is a critical part of that growth mission, increasing employment and income levels by "increasing productive business investment through targeted industrial policies." Such industrial policies should "focus on sectors with the greatest potential to raise national levels of investment and productivity, spread prosperity to all parts of the country, make us all more secure, and seize the opportunities of net zero."

2.29 Table 2 **– Modern Industrial Strategy General Policy Summary**summarises the general policies and interventions of the Modern Industrial Strategy. The Strategy also focuses on eight 'frontier industries' or sectors, known as the Industrial Strategy Eight or IS-8. These

are:

- Advanced Manufacturing
- Clean Energy
- Creative Industries
- Defence
- Digital and Technologies
- Financial Services
- Life Sciences
- Professional and Business Services.

2.30 The policies and interventions for these sectors are set out in Table 3 **– Modern Industrial Strategy IS-8 Sector Policy Summary**.

Table 2 – Modern Industrial Strategy General Policy Summary

Topic	Policy Approach	Interventions
Reducing electricity costs, accelerating grid connections and promoting industrial decarbonisation	• Make electricity cheaper for manufacturing industries in the IS-8 and foundational industries • Accelerate grid connection for major investment projects	• Reduce electricity costs for IS-8 manufacturing industries increase support • Reduce grid connection waiting times for strategically important projects • Deepen cooperation with the EU. We will both explore the UK's participation in the EU's internal electricity market.
Promoting trade and international cooperation	• Use the full suite of trade tools to boost UK growth and unblock barriers for UK exporters and importers • Forge new partnerships to promote our frontier industries and increase supply chain resilience • Greater support to grasp opportunities in the world's largest economies/highest-potential markets	• Drive forward specific negotiations with key international partners • Support UK businesses to export • Refocus the Government's overseas network towards the IS-8 • Expand our 'Government to Government' (G2G) commercial partnerships capability.
Strengthening our economic and national security	• Ensure that public finance is deployed strategically to support economic and national security • Collaborate with our international partners to increase investment into our strategic industries • Strengthen our domestic foundations and increase business support	• Invest in critical supply chains and national security capabilities • Take immediate action to support foundational industries for the IS-8 by building up infrastructure and supply chains • Support the shift to low-carbon energy in the production of critical inputs
Expanding access to finance	• Boost our public finance offer and tilt it towards the IS-8 • Develop the UK's venture ecosystem • Reform capital markets and pensions investment to support the most innovative firms • Use public finance to help the IS-8 access critical supply-chain inputs or develop critical capabilities.	• Harness our Public Financial Institutions to support initiatives • Increase the British Business Bank's capacity and capability • Deliver further reforms to ensure that our capital markets and domestic investors support growth • Prioritise economic security and resilience in the public finance offer.
Driving and supporting innovation	• Prioritise government support for innovation towards the IS-8 and the city regions and clusters where they are concentrated • Focus the UK's R and D system on long-term economic growth • Ensure that science and technology inform how we deliver our national missions and drive economic growth • Help innovative firms with high growth potential • Make the UK the best place in the world to invest in AI	• Drive innovation in frontier industries through increased funding stability, increased collaboration between industry and academia, innovation-led growth across the UK • UK Research and Innovation will increase support for the IS-8 by pivoting its programmes and budgets • Establish a new Sovereign AI Unit • Continue to support universities through Higher Education Innovation Funding • Improve technology adoption across the economy through an expansion of proven interventions, an Industrial Strategy AI Adoption Fund and government taking a greater role to coordinate technology adoption activity.

Topic	Policy Approach	Interventions
Capitalising on the value of data	• Treat data as a modern economic, financial, and social asset • Ensure that stakeholders have the tools, infrastructure, and capabilities to unlock data's financial, economic and societal benefits • Transform how data is used.	• Develop and implement a data valuation framework • Invest up to £12 million in UK Data Sharing Infrastructure Initiatives • Support the development of data and content marketplaces or exchanges in the UK • Invest £36 million to support a new Smart Data scheme • Introduce the National Data Library.
Enhance skills and accelerate access to talent	• Ensure that the skills system and employment support are aligned to strategic economic priorities • Encourage engagement and investment from employers to address skills gaps and build talent pipelines • Make it easier for innovators, investors, entrepreneurs, researchers and creatives to come to the UK to live and work • Promote evidence-based initiatives aimed at improving workforce diversity to support business and economic growth.	• Align skills systems with the IS-8 including: • Provide specific support for skills critical to the IS-8. Bring forward three further packages targeted at engineering, technology and defence • Work with employers to drive investment in training • Help more people start and progress in careers in the IS-8 • Temporarily exempt occupations crucial to the delivery of the Industrial Strategy from the planned increase to the to the threshold for the Skilled Worker visa • Focus on getting the world's brightest minds to relocate to the UK • Improve business mobility.
Reducing regulatory burdens	• Press ahead with root-and-branch reform of the system, including by reducing the administrative costs of regulation by 25 percent by the end of this Parliament • Prioritise regulatory reform for our frontier industries.	• Improve regulator performance through stronger transparency and accountability • Ensure that regulation supports and keeps pace with innovation • Unlock the full potential of competition to increase market dynamism and economic growth • Simplify corporate reporting requirements and make it easier for foreign companies to move to the UK.
Removing planning barriers and accelerating infrastructure	• Ensure that the planning framework supports growth in the eight priority sectors, as reflected in the revised NPPF • Undertake a 10-Year Infrastructure Strategy.	• Fast-track more projects through the planning process, by: ○ Increasing certainty for gigafactories, laboratories, and data centres by allowing them to 'opt in' to be designated as Nationally Significant Infrastructure Projects ○ Reduce the average pre-application period for major infrastructure projects to 12 months ○ Launch a Call for Evidence on the expansion of permitted development rights ○ Streamline processes for judicial reviews so that claimants have just one attempt to challenge a development ○ Establishing AI Growth Zones. • A 13-week target for decisions made by Ministers on called-in applications • Provide funding for 300 new planning officers and offering new flexibilities for planning application fees to be set locally • Implement a Nature Restoration Fund so developers can make a single payment for environmental obligations

Topic	Policy Approach	Interventions
Delivering a tax system that supports growth	• An internationally competitive headline tax rate • World-leading capital allowances • A competitive Patent Box regime • Investment schemes which stimulate private investment into early-stage and high-growth potential businesses • Support businesses to recruit and retain important skilled employees • tax reliefs for the creative sector • Businesses can also deduct the cost of training their staff taxes	Ongoing
Supporting the UK's city regions and clusters	• Focus our efforts on the city regions and clusters where the IS-8 concentrate • Ensure that public investment in the nations and regions of the UK is given a fair hearing.	• Launch a new Strategic Sites Accelerator with over £600 million • Enhance the offer for Industrial Strategy Zones • Establish new AI Growth Zones across the UK • Grow high-potential innovation ecosystems through the Local Innovation Partnerships Fund • Establish a new local growth fund • Review the recommendations put forward by the New Towns Taskforce considering the location of growth-driving sectors • Relocate Civil Service roles and half of UK-based senior civil servants to towns and cities across the UK. **Supporting Mayors and Local Authorities in England** • Invest in high streets. **Strengthening Connections Between and within City Regions and Clusters** • Improving rail connectivity between city regions and clusters in Wales and England, including between South Wales and Bristol, through new stations between Cardiff and the Severn Tunnel
Creating an enduring partnership with business	• Implement our Industrial Strategy in and through partnership with business. • Use public procurement to bolster domestic competitiveness • Work closely with devolved governments and Mayoral Strategic Authorities (MSAs) to harness the potential of places across the UK • Ensure that we are on track to deliver our ambition in the IS-8 by 2035 • Maintain our momentum and focus on the long-term.	• Take opportunities to combine public and private funding to attract private capital • Ensure that the full benefits of public and private investments, especially for delivering the objectives of our Industrial Strategy, are considered when considering the case for government action or support • Improve the way in which grant funding is approved • Reform public procurement • Ensuring that businesses and investors receive timely support and decisions • Improve support for SMEs

Source: UK Government, 2025

Table 3 – Modern Industrial Strategy IS-8 Sector Policy Summary

IS-8 Sector	Policy Approach	Interventions
Advanced Manufacturing	• Reform the business environment so that the Advanced Manufacturing sector has the long-term certainty, stability and ease of doing business to build resilience, scale up innovation and automation, develop a dynamic and digitally literate workforce • Prioritise frontier manufacturing industries with the greatest growth potential – Automotive, Batteries, Aerospace, Space, Advanced Materials, Agri-Tech • Support Advanced Manufacturing clusters across the UK • Partner with industry to implement the Plan.	• Reduce electricity costs for the energy intensive manufacturers by increasing discounts through the British Industry Supercharger and creating a new British Industrial Competitiveness Scheme for specific manufacturing industries • Strengthen supply chains by supporting foundational industries vital to competitiveness • Drive innovation and commercialisation in our frontier industries by committing up to £4.3 billion in funding • Accelerate the uptake of robotics and 'lean processes' • Build the sector's skills base • Make targeted regulatory changes to boost growth • Support clusters by collaborating with Mayoral Strategic Authorities and local authorities to support electric vehicle manufacturing and supporting Industrial Strategy Zones.
Clean Energy	• Reform the business environment to build resilience • Double down on frontier clean energy industries with the greatest growth potential – Wind, Nuclear Fission, Fusion Energy, Carbon Capture Usage and Storage, Hydrogen, Heat Pumps • Support electricity networks as a foundational enabler to growth • Utilise the skills of our existing energy workforce • Deliver joint commitments from both government and industry.	• Provide a clear mission to drive investment certainty • Deliver targeted and catalytic funding to support jobs, innovation and growth • Break down barriers to investment, such as removing blockers in the planning system via the Planning and Infrastructure Bill and National Policy Statements • Ensure we have the skilled workforce we need, creating good quality jobs and placing them at the heart of the clean energy future • Collaborate internationally to diversify supply chains • Back our network of Investment Zones.
Creative Industries	• Transform the business environment to accelerate innovation, improve access to finance, grow the long-term skills pipeline, responding to the sector's needs and supporting a productive, increase trade and exports • Prioritise frontier industries − Advertising and Marketing, Film and TV, Music, Performing and Visual Arts and Video Games • Support the growth of creative clusters across the UK • Partner with creative leaders, companies, Mayors, trade associations, universities and colleges.	• Boost innovation and commercialisation by significantly increasing UK Research and Innovation's support for creative businesses • Ensure a copyright regime that values and protects human creativity • Establish a Creative Content Exchange (CCE) to be a trusted marketplace for selling, buying, licensing, and enabling permitted access to assets • Boost creative education • Explore with the EU and member states how best to improve arrangements for touring artists across Europe • Increase the number of creative trade missions and markets accessed • Provide targeted support for our frontier industries, with £75 million for film and TV, £30 million for video games, and up to £30 million for music over the next three years • Support creative clusters through a new Creative Places Growth Fund devolving £150 million over three years.

IS-8 Sector	Policy Approach	Interventions
Defence	• Reform the business environment to back UK-based businesses, improve defence procurement and acquisition, make the UK a defence innovation leader, put exports and international capability partnerships at the heart of our approach, support resilient and secure growth • Prioritise frontier industries critical to security and growth – Drones and Autonomous Systems, Combat Air, Complex weapons, Maritime Capabilities, Directed energy weapons • Launch new Defence Growth Deals across the UK to support localised ecosystems in the places with the highest growth potential in defence-related industries • Deepen collaboration with the sector.	• Accelerate the adoption of novel and dual-use technologies by spending at least 10 percent of the Ministry of Defence's equipment budget on acquiring novel technologies, and other funding • Back UK-based business by increasing MODs spending with SMEs • Reform procurement • Increase defence exports • Working with industry to deliver a defence skills package.
Digital and Technologies	• Reform the business environment so that the Digital and Technologies sector can invest in R and D, start and scale up, grow the skills pipeline and attract the brightest and best, benefit from reformed regulation and standards and secure the benefits of international collaboration • Prioritise frontier technologies with the greatest growth potential − Advanced Connectivity Technologies, Artificial Intelligence (AI), Cyber Security, Engineering Biology, Quantum Technologies and Semiconductors • Unlock the potential of Digital and Technology clusters • Partner with industry to implement this Plan.	• Support innovation, including by increasing R and D funding to £22.6 billion by 2029/2030 • Build the workforce through wider skills reforms while attracting top talent from overseas • Create a more supportive regulatory environment • Strengthen international partnerships • Invest in R and D and scale-up infrastructure for frontier technologies • Seize AI opportunities, including by expanding the Government's AI Research Resource, establishing a new Sovereign AI Unit, invest in AI for science opportunities.
Financial Services	• Ensure the Financial Services sector can fulfil its role as the enabler of growth across the real economy • Channel our pensions capital into the UK to support the IS-8 • Boost our capital markets, building on their depth and strength • Aim to make the UK the most technologically advanced global financial centre • Enable industries with the greatest potential to invest and grow − Asset Management and Wholesale Services, Capital Markets, Fintech, Insurance and Reinsurance Markets, Sustainable Finance • Unlock the economic potential of our financial services clusters • Implement our Sector Plan with industry.	• Ensure that the Financial Services regulatory system supports growth • Set up a bespoke Financial Services 'concierge service' to help international firms get to grips with UK regulations.

IS-8 Sector	Policy Approach	Interventions
Life Sciences	• Reform the business, regulatory, and public finance landscape across three pillars − Supporting world-class Rand D, Making the UK an outstanding place in which to start, grow, scale, and invest, Driving health innovation and NHS reform • Prioritise frontier life sciences industries with the greatest growth potential – Pharmaceuticals and Medical Technologies • Unleash the economic potential of Life Sciences clusters.	• Realising a Health Data Research Service • Slashing trial approval times to under 150 days • Backing manufacturing with up to £520 million through the Life Sciences Innovative Manufacturing Fund • Streamlining regulation and market access • Introducing Low-friction Procurement • Partnering with industry to increase growth and innovation.
Professional and Business Services	• Reform the business environment so that the sector has the ease, certainty, long-term stability to increase tech adoption and innovation, develop a highly skilled workforce, enter new markets and grow exports, access growth finance in all regions of the UK, provide international leadership in setting standards and regulations • Prioritising pioneering and world-leading frontier industries with the greatest growth potential − Accountancy, Audit, and Tax; Legal Services; Management Consultancy • Build on the sector's regional strengths by supporting clusters	• Boost tech adoption for SMEs by expanding the Made Smarter programme • Unlock innovation by developing a Smart Data programme • Expand the new AI Skills Hub • Support exports, trade, and inward investment • Create opportunities across the UK by launching sector Hubs.

Source: UK Government, 2025

Sub Regional Economic and Planning Policy

2.31 Relevant economic and planning policy documents produced for the SLP Area and Gloucestershire are reviewed in this section. This includes assessments of sub-regional employment land needs.

County Wide

Gloucestershire's Local Growth Plan: Our priorities for Economic Development (2025 to 2035) (Draft Version 12, October 2025)[1]

2.32 Gloucestershire's Local Growth Plan (LGP) sets out an economic vision to enhance prosperity, the environment and wellbeing in the county. Its vision is: "Gloucestershire: Ambitious for our people, our businesses and our planet - inspiring enterprise and innovation, leading to enhanced prosperity and wellbeing for all residents." To achieve this, the LGP sets out five 'economic missions':

- "Mission 1: Talent and Future Skills - "Unlocking talent, unlocking tomorrow"
- Mission 2: Supporting Employment Opportunities for All - "Wellbeing without barriers"
- Mission 3: Thriving Communities and Culture - "A sense of place and belonging"
- Mission 4: Environment, Housing, and Infrastructure - "Building in balance with nature"
- Mission 5: Innovation, Investment & Enterprise - "From vision to value".

2.33 Mission 5 is most relevant to this Study, and achieving this Mission will be based around the following priorities:

- "5.1: Build a thriving innovation ecosystem led by high-growth sectors - connecting local enterprise with national and regional networks
- 5.2: Support industry-led initiatives and partnerships to unlock growth and deliver flexible, high-quality commercial workspace
- 5.3: Unlock finance and investment opportunities for a broader range of local enterprises, including the exploration of alternative sustainable funding

[1] Gloucestershire's LGP was agreed by the City Region Board on 14th November 2025. And adopted by Gloucestershire County Council Cabinet on 22nnd April 2026.

mechanisms (e.g. pension funds, climate bonds, declaring Designated Employment Areas) for businesses and environmental enhancement schemes

- 5.4: Strengthen Gloucestershire's inward investment offer through the Invest in Gloucestershire brand, attracting domestic and international organisations to relocate and grow here
- 5.5: Empower start-ups and SMEs through targeted support from the Growth Hub and sector groups - driving innovation, resilience, and job creation
- 5.6: Embed environmental, social value and governance (ESG) principles and community wealth-building across the economy - supporting local supply chains, net zero innovation, and inclusive investment."

2.34 The LGP also identifies four high growth sectors for the county:

- Secure Technologies and Digital – Building on GCHQ and an associated cluster of cyber-specialist SMEs, along with broader specialisms in AI, quantum, climate, biosecurity, and human resilience. It has a focus at Golden Valley (including Cyber Central UK, discussed below), a £1 billion employment-led technology cluster aligned with the UK's National Science and Technology Strategy in Gloucestershire. Located next to GCHQ in Cheltenham, the scheme will deliver over 93,000 sqm (1 million sqft) of commercial space, 3,700 homes, and 12,000 new jobs. Developer HBD is leading the development, in partnership with Cheltenham Borough Council. Developments include the 14,862 sqm National Cyber Innovation Centre
- Agri-Tech – Building on Hartpury University and the Royal Agricultural University, and with an emphasis on increasing food security. Key developments fall outside of the SLP Area, however
- Advanced Engineering and Aero Space – Supported by access to two key aviation centres, Gloucestershire Airport and Cotswold Airport. Existing industry leaders in Gloucestershire include Safran, GE Aerospace, Dowty Propellers, Ultra, and Moog, which have high value specialisms in aircraft maintenance, repair and overhaul and precision components. Further industry growth opportunities across the county include novel materials, and robotics capabilities, and space industry manufacturing. Highly specialised clusters of Advanced Engineering and Manufacturing major and high growth industries exist across the county, with Tewkesbury borough, a particularly pivotal location for innovation, advanced manufacturing and defence

- Energy Transition and Low Carbon Innovation – Gloucestershire possesses "existing strengths in renewable innovation and a strong commitment to grassroot neighbourhood and community-led initiatives, across the broader spectrum of domestic retrofit, SME energy efficiency investment and measures, through to the decarbonisation of larger industries and energy generation." "Gloucestershire is also at the forefront of the emerging green hydrogen ecosystem, with local industry pioneers such as Progressive Energy, Kiwa Energy, and ZeroAvia."

Gloucestershire's Economic Strategy 2024-2034 and Action Plan (2024)

2.35 The Economic Strategy outlined the focus of economic activity across Gloucestershire for the next 10 years, to help achieve the Gloucestershire 2050 vision. The Gloucestershire 2050 vision is:

> **Gloucestershire 2050: Driven by innovation, built on heritage**
> "By 2050, Gloucestershire will be a hub for the UK's intelligence, security, and cyber agencies. We will be a centre for world-leading, sustainable businesses in the cutting-edge industries of digital communications, advanced manufacturing, agri-tech, and green and nuclear energy, while preserving our rich cultural and natural heritage.
> Gloucestershire will build on its strength as a prominent location in western England with ease of access to regional hubs in, and beyond, the Western Gateway. We will sustain our unique mix of nationally important rural landscapes and vibrant urban centres by delivering a stronger, more sustainable economy that benefits the whole county."

2.36 The Economic Strategy is based around four Strategic Priorities:

- Sustainable Growth – "By 2050, Gloucestershire's ambitions for future housing and employment growth will have delivered new carbon-neutral communities". Development here will be underpinned by the Spatial Development Strategy, with a focus towards the Central Economic Growth Corridor (Cheltenham to Gloucester) and supported by an Infrastructure Delivery Plan
- Inward Investment – "By 2050, Gloucestershire will have attracted new levels of inward investment fostering innovation, creating jobs, and promoting prosperity across the county. It will be recognised as the most advanced county for digital

communications, advanced manufacturing, agri-tech, and energy production including green and nuclear energy." This is based on two propositions:

- Strengthening key sectors: "to build on Gloucestershire's strengths in emerging technologies including cyber security, artificial intelligence (including the Golden Valley Development (including Cyber Central) adjacent to GCHQ, Cheltenham, discussed further below) and semi-conductors, advanced manufacturing, agri-tech, and energy, to drive investment. Work with partners across the county to deliver inward investment into these sectors, focused on key clusters.
- Additional opportunities to attract investment – One action for this is to "consider the needs of future sustainable growth and employment land demand/requirements of potential investors and growth of indigenous FDI companies as part of any future Economic Needs Assessment."

- Employment and Skills – "By 2050, skills provision in Gloucestershire will be fully aligned to the local economy. Every resident will have the opportunity to access training and development, increasing skills and opening pathways to good employment opportunities".
- Business Innovation and Support – "By 2050, the Gloucestershire economy will have built on its strong research and innovation heritage to achieve greater collaboration between academia, industry, and government. It will be in the top 20% of local authorities for business survival and deliver an inclusive and highly productive economy."

Invest Gloucestershire – Key Sectors

2.37 Supported by the above strategies, Invest Gloucestershire, on its website, identifies the following as key sectors for the county:

- Agri-Tech – Gloucestershire is home to two strong agricultural institutions – the Royal Agricultural University and Hartpury University and Hartpury College – and boasts the UK's largest agri-tech incubator, Farm491, Cirencester. All support a diverse range of Research and Development activities. The sector supports 50,000 jobs in the county with £32 million in recent investment and the largest cluster of sectoral SMEs in the UK.
- Cyber Tech – The existing sector is focused on the GCHQ, Cheltenham (which employs some 5,988 people). It is also supported by the county's dedicated cyber-tech educational facilities, including C11 Cyber Security and Digital Innovation

Centre, SGS Berkeley GREEN and the University of Gloucestershire's School of Business and Technology. Cyber Central launched in 2023, and will host the National Cyber Innovation Centre (which now has Outline planning consent), "a dedicated facility that will harness government, academic and private sector resources to further develop the UK's capabilities in cyber-tech." The park will also host a cyber campus with research and education facilities, a skills and visitor centre, an incubation area for local start-ups, and space for larger cyber companies. Existing cyber facilities in the county include the Hub8 co-working facility, Cheltenham. Gloucestershire has also been chosen by the Department for International Trade to be showcased as a world-leading cyber cluster through the High Potential Opportunities (HPO) programme.

- Advanced Manufacturing – Building on an established business cluster with sub-sector specialisms in aerospace, healthcare, hydraulic pumps, precision measurement and disruptive materials. Three quarters of the firms active in this sector are known to be investing in innovation.
- Renewables – Building on the capabilities of reputed local green companies – such as Ecotricity, McKerrow Engineering, Tidal Lagoon Power and Green Fuels – and attracting more to the county, as well as building on plans for sustainable transport, development and farming.

Gloucestershire Housing and Economic Needs Assessment (HENA), Draft Report (March 2026)

2.38 The HENA assesses housing and employment land development needs over the period from 2024 to 2046, and onwards to 2050, to inform local plans, and, in due course, the preparation of a Spatial Development Strategy (SDS). It covers the SLP Area of Cheltenham, Gloucester and Tewkesbury, but also the other Gloucestershire authorities of Cotswold, Forest of Dean and Stroud.

2.39 Focusing on Part B of the HENA, "Economic Dynamics and Employment Land Needs", the HENA undertakes a detailed analysis of the economy of Gloucestershire which has strengths in sectors including advanced manufacturing and engineering, cyber and digital industries, agri-tech and the visitor economy. Such higher value economic activity is concentrated around Gloucester and Cheltenham and along the M5 corridor for industrial and logistics activity. Cheltenham has the strongest office market and knowledge-based economy. "Particular opportunities are expected to arise in the cyber and digital industries

linked to the Golden Valley development in Cheltenham; in advanced engineering and manufacturing activities particularly along the M5 corridor; and associated with the transition to a lower-carbon economy, including energy production and green technology. Increased housing development and population growth will also drive local economics in population serving sectors like hospitality, retail and health as well in construction and its value chain." In Section 3.0 of this Study, that economic information is reviewed in detail and broken down to the level of the three relevant authorities, where possible.

2.40 In terms of the sub-regional property market, for offices the HENA notes that "Gloucester and Cheltenham have by far the largest office stocks at 263,000 sqm and 262,000 sqm respectively. Tewkesbury has the next largest (137,000 sqm), a large part of which has been developed since 2011. Gloucestershire's office stock has contracted since its 2011 peak, driven primarily by losses of older town-centre space in Gloucester (26,000 sqm less space) and Cheltenham (73,000 sqm less space), largely through residential conversion."

2.41 "There appears to be demand for modern, high-quality (4-star) space, which shows consistently low vacancy, while mid-quality (3-star) stock has experienced negative net absorption since 2020. Office growth has primarily occurred along the M5-corridor, particularly Tewkesbury (and to a lesser extent Stroud)."

2.42 Overall vacancy rates, for office stock, at 5.8 percent in November 2025 for the County, are within a healthy range, being below South West (6.9 percent) and England (8.2 percent) averages. Within the SLP Area, Gloucester and Cheltenham had lower rates at 5.8 percent and 6.2 percent respectively whilst Tewkesbury has the highest vacancy rate at 8.2 percent, "although this corresponds to recent delivery of a significant amount of floorspace." However, "recent negative net absorption reflects post-COVID reassessment of space needs rather than structural oversupply."

2.43 By local authority area the main comments are that:

- "Gloucester is one of the county's two largest office markets but has seen net stock loss since 2011 through conversions. It is a stable but low-growth market dominated by public sector and administrative uses; with net absorption recently keeping pace with modest completions, leading to a drop in the vacancy rate." Average rents, as of 2025, are at £15.85/sqft (£171/sqm)

- "Cheltenham is the highest-value office market in the county, with the highest rents (at £24.11/sqft (£260/sqm)) and strong historic growth, including an 87 percent uplift in rents since 2015. It has seen a large loss in office space recently through conversions, and negative net absorption since COVID reflects this loss of older office stock as well as softening of demand. Vacancies have increased as a result but remain at a healthy level.
- Tewkesbury has a fast-growing office market focused on M5 corridor business parks. It has strong deliveries and net absorptions in the late 2010s and is strongly represented in recent large lets. However, negative net absorption in the last five years has given it the county's highest vacancy rate. Average rents are £18.08 sqft (£195/sqm).

2.44 In terms of the industrial market it noted that Tewkesbury has the largest industrial stock at 918,000 sqm, and which saw a 21 percent growth over 2003-2023. Gloucester and Cheltenham have stocks of 692,000 sqm and 365,000 sqm and saw reductions in overall stock levels 0f 19-20 percent, reflecting brownfield redevelopment.

2.45 Overall, "Gloucestershire has a large and diverse industrial base spread across all authorities, but recent net growth and larger lettings have been highly concentrated in Tewkesbury and Stroud, aligned with the M5 corridor. Other authorities, particularly Gloucester and Cheltenham, have seen long-term net losses of industrial stock, largely due to redevelopment of older sites."

2.46 "Industrial vacancy rates were exceptionally low between 2016–2022, indicating supply-constrained conditions, before rising to healthier levels following recent delivery and softer demand." As of November 2025, they were 3.7 percent for Gloucester, 5.7 percent for Cheltenham and 6.1 percent for Tewkesbury.

2.47 "Net absorption has turned negative since 2023, suggesting some cooling in demand, though vacancy remains within a normal market range rather than indicating oversupply."

2.48 By local authority the key findings were that:

- "Stroud and Tewkesbury have seen strong delivery and net absorption, focused strongly around the M5 corridor. Completions and leasing have been particularly strong in Tewkesbury around the boundaries of Gloucester and Cheltenham.

Recent deliveries have outpaced net completions, and vacancy rates have risen (while remaining within a healthy range).

- Gloucester and Cheltenham have moderate industrial stocks and despite some delivery of new stock have seen a net loss of industrial space to redevelopment. Net absorption has been substantially lower than Stroud and Tewkesbury, although Gloucester has been represented in larger lease deals." Average rents for the SLP Area authorities are £7.80 - £8.70/sqft (£84-94/sqm).

2.49 The HENA identifies a common Functional Economic Market Area (FEMA) extending across all six Gloucestershire local authorities. It is centred on the larger employment centres of Gloucester and Cheltenham, which are well connected, with the M5 Corridor playing a key role for industrial property. Tewkesbury has a particularly low level of self-containment, with strong links to both Gloucester and Cheltenham. South Worcestershire also sits within a broad secondary FEMA which includes Tewkesbury, Cheltenham and Cotswold. However, no authority within Gloucestershire lies wholly or mostly within the FEMA of an authority outside of the county.

2.50 The HENA uses a variety of methods to forecast employment land need including labour demand modelling, based on econometric forecasting (both baseline and with an allowance for growth, in key sectors, above the average), demographically derived assessments of current and past take up modelling based on the forward projection of historic completions (gross and net of recorded losses of space to other uses). "Different forecasting techniques have their advantages and disadvantages. Econometric forecasts take account of differences in expected economic performance moving forward relative to the past. However, a detailed model is required to relate net forecasts to use classes and estimate gross floorspace and land requirements. For office-based sectors consideration needs to be given to the impacts of trends in home working (with an allowance for homeworking or WFH). For industrial sectors however the relationship between floorspace needs and employment trends may be weak – influenced by productivity improvements."

2.51 "In contrast, past take-up is based on actual delivery of employment development; but does not take account of implications of growth in labour supply or housing growth nor any differences in economic performance relative to the past. It is also potentially influenced by past land supply and/or policies."

2.52 "A third supply-based calculation looks at past take-up of space occupied (rather than land delivered), measured by net absorption using CoStar data. … the net absorption is the balance between the amount of space moved into and moved out of (i.e. Net absorption = Move ins – Move outs), equating to the change in occupied space. This differs from the net completions-based calculations in that it predicts future floorspace requirements directly based on market demand for floorspace rather than past completions of floorspace (which is only a proxy for floorspace demand)."

2.53 Finally, a 'suppressed demand' model 'tops up' historic take-up to where it would have been at 8 percent premises availability (i.e. 8 percent of local premises is on the market at any given time, providing choice for businesses), a level of sensitivity testing applied where market availability appears to have been consistently suppressed over several years. It assumes that the market 'wanted and will want' this level of take-up consistently, which may not be the case.

2.54 The "preference for the availability 'target' is 8 percent, with 5 percent being a recognised minimum. However, for strategic units and strategic sites, this 8 percent is considered to be more optimistic than the wider market, partly as build-to-suit rather than spec build is more common for very large units due to higher costs, which would mean typically lower vacancy and potentially lower availability depending on marketing and pre-let strategies. As a result, it is considered that a rate below 8 percent is a reasonable minimum, and an availability rate of 5 percent has been carried forward under a 'Low' scenario, and an 8 percent rate under a 'High' scenario and a suppressed-demand scenario."

2.55 The results of the need assessment for 2024-2046 are shown in Tables 4 to 7. The forecasts of jobs change within the HENA are considered in more detail in Section 3.0. The HENA conclusions are that:

- Industrial – Baseline labour demand forecasts do not reflect increases in labour supply resulting from identified housing needs/population growth and do not account for local economic opportunities or strengths. "As a result, the baseline labour demand results are likely to underestimate industrial land needs." "There is substantial evidence of industrial demand suppression in the M5 corridor from both market data and stakeholder engagement. As a result, it is appropriate to plan for a level of growth which recognises this. For the SLP Area, the growth scenario

labour demand results fall between the two supressed demand modelling results and so appear to be the most sensible guide to future industrial needs. This is above the two market signals approaches (as expected given historic constraints on supply) but falls below the gross completions which in many cases would be considered an upper bound for demand." The recommended need is thus **673,900 sqm or 168.5 ha in the SLP Area, equating to 30,600 sqm/year or 7.7 ha/year, with the allocation into each authority determined through joint planning.**

- Offices – "Apart from the gross completions, the market-trend based results fall for office space well below the growth scenario labour demand results... This reflects recent office losses from conversions and reductions in office demand in the context of the recent rise in remote and hybrid working. As the sub-regional office market is unlikely to support extensive private sector led office development, under present conditions at least, there is not a need to allow for office delivery above labour demand modelling results under the working from home set of assumptions for most of the county. However, within the SLP Area higher levels of office delivery are likely to be seen, driven by the Golden Valley development of Cheltenham. "As a result, it is considered that the growth scenario WFH results (144,600 sqm) for the SLP Area should be considered as a minimum level of office and R&D floorspace need to plan for. It is noted that between 1 and 1.2 million sqft of commercial space are proposed at Golden Valley, which would constitute most of this need result." "Providing some scope for provision above this over the modelled period would therefore ensure that there is a sufficient flexibility in economic land supply not to risk constraining growth, particularly in the context of recent losses of office space through conversion to residential use in both Gloucester and Cheltenham. As a result, it would be appropriate to plan for a level of office supply between the growth scenario labour demand modelling results under the WFH and standard set of assumptions" – **Between 109,600 and 206,200 sqm, or 28.9 and 41.2 ha with any allocation into individual authorities to be determined through joint strategic planning processes.**

Table 4 – Industrial Floorspace Need Results Summary, Sqm

	Baseline labour demand	Growth scenario labour demand	Gross completions	Net completions (VOA)	Net absorption	Suppressed demand (5 percent benchmark)	Suppressed demand (8 percent benchmark)
Cotswold	53,900	249,800	71,800	35,400	59,800	49,700	64,900
Forest of Dean	129,800	183,200	88,100	123,700	28,400	26,900	56,900
Stroud	195,700	314,400	504,800	464,700	511,700	445,600	556,400
Cheltenham	92,600	107,500	192,500	3,900	66,400	N/A	N/A
Gloucester	217,000	217,800	207,700	204,400	140,400	N/A	N/A
Tewkesbury	309,700	348,700	312,300	336,600	261,400	N/A	N/A
SLP Area	619,200	673,900	712,600	544,900	468,200	446,000	889,100
Gloucestershire total	**998,600**	**1,421,200**	**1,377,300**	**1,168,700**	**1,068,100**	**968,200**	**1,567,300**

Source: Iceni analysis, 2026

Table 5 – Industrial Land Need Results Summary, ha (assumes 40 percent site coverage or 4,000 sqm/hectare)

	Baseline labour demand	Growth scenario labour demand	Gross completions	Net completions (VOA)	Net absorption	Suppressed demand (5 percent benchmark)	Suppressed demand (8 percent benchmark)
Cotswold	13.5	62.4	18.0	8.9	15.0	12.4	16.2
Forest of Dean	32.5	45.8	22.0	30.9	7.1	6.7	14.2
Stroud	48.9	78.6	126.2	116.2	127.9	111.4	139.1
Cheltenham	23.1	26.9	48.1	1.0	16.6	N/A	N/A
Gloucester	54.3	54.4	51.9	51.1	35.1	N/A	N/A
Tewkesbury	77.4	87.2	78.1	84.2	65.4	N/A	N/A
SLP Area	154.8	168.5	178.2	136.2	117.1	111.5	222.3
Gloucestershire total	**249.7**	**355.3**	**344.3**	**292.2**	**267.0**	**242.1**	**391.8**

Source: Iceni analysis, 2026

Table 6 – Office Floorspace Need Results Summary, Sqm

	Baseline labour demand	Growth scenario labour demand	Baseline WFH labour demand	Growth Scenario WFH labour demand	Gross completions	Net completions (VOA)	Net absorption
Cotswold	40,200	79,500	28,700	55,800	27,900	15,500	16,300
Forest of Dean	12,700	20,800	9,500	15,200	27,700	8,900	10,000
Stroud	26,900	49,100	19,300	35,600	37,300	22,900	28,700
Cheltenham	80,000	109,800	57,300	76,700	83,100	-100,900	10,800
Gloucester	44,600	64,000	31,700	43,900	33,200	-63,200	44,400
Tewkesbury	27,400	32,400	20,500	24,000	61,000	29,300	39,600
SLP Area	152,000	206,200	109,600	144,600	177,300	-134,800	94,800
Gloucestershire total	**231,700**	**355,600**	**167,000**	**251,200**	**270,200**	**-87,500**	**149,800**

Source: Iceni analysis, 2026

Table 7 – Office Land Need Results Summary, ha (assumes 50 percent site coverage or 5,000 sqm/hectare)

	Baseline labour demand	Growth scenario labour demand	Baseline WFH labour demand	Growth Scenario WFH labour demand	Gross completions	Net completions (VOA)	Net absorption
Cotswold	40,200	79,500	28,700	55,800	27,900	15,500	16,300
Forest of Dean	12,700	20,800	9,500	15,200	27,700	8,900	10,000
Stroud	26,900	49,100	19,300	35,600	37,300	22,900	28,700
Cheltenham	80,000	109,800	57,300	76,700	83,100	-100,900	10,800
Gloucester	44,600	64,000	31,700	43,900	33,200	-63,200	44,400
Tewkesbury	27,400	32,400	20,500	24,000	61,000	29,300	39,600
SLP Area	152,000	206,200	109,600	144,600	177,300	-134,800	94,800
Gloucestershire total	**231,700**	**355,600**	**167,000**	**251,200**	**270,200**	**-87,500**	**149,800**

Source: Iceni analysis, 2026

Gloucestershire Economic Needs Assessment (2020)

2.56 This review of employment land needs is updated and superseded by the HENA. However, a few points worth highlighting from this older assessment include:

- A review of commuting and self-containment rates indicates that the six Gloucestershire authorities can be considered to form a single FEMA.
- In terms of sectoral priorities, it notes that Advance manufacturing is a priority for many surrounding sub-regions. Cyber security is a priority sector for Swindon and Wiltshire and Worcestershire. Worcestershire also prioritises Agri-tech and Low carbon energy. In the West of England Combined Authority, Low carbon industries is a priority sector.
- While Gloucestershire has a number of priority sectors, recent growth has been

strongest in construction, health and social care and financial and professional services.

- Market demand is strongest along the M5 Corridor and particularly at Junctions J9-J12 spanning Tewkesbury Borough and serving Cheltenham and Gloucester. “Gloucestershire has a very skilled workforce – particularly relating to certain high-end manufacturing sub-sectors, and other highly skilled sectors such as nuclear energy, other forms of energy, and cyber security. For this reason the majority of occupiers would not generally seek to move beyond the M5 corridor into other locations within Gloucestershire”.
- “Demand for office space is principally focused in Gloucester, Cheltenham, and neighbouring businesses parks. Gloucester City Centre and Cheltenham Town Centre are the most sought-after locations due to the proximity to town centre retail, leisure and amenities and public transport links. Cheltenham Town Centre is the most attractive location due to the higher quality of the environment and regency stock proving popular. Other desirable factors are the proximity to town centre retail, leisure, and amenities. This is reflected in significantly higher prices in the town. Gloucester City Centre, and Gloucester Quays, are other popular office locations. Beyond the city centre, Quedgeley and the area around J12 in Gloucester/Stroud district provides a business park type offer which is a popular location”.
- Over 2011-2020 across Gloucestershire there has been a net gain of 88,165 sqm of industrial floorspace. The majority (75 percent) of this has been in Tewkesbury Borough. Cheltenham and Forest of Dean have seen a net loss of industrial floorspace over this period, due to relatively low levels of gross completions rather than particularly high levels of loss.
- Most industrial completions were for units of 100-1,000 sqm.
- Across Gloucestershire the average vacancy rate, in 2020, was 7 percent, increasing to 10 percent in Gloucester which indicates a reasonable level of choice for businesses.
- Over 2011-2020 across Gloucestershire there has been a gain of 102,300 sqm of office floorspace, focused in Stroud District. Conversely, the level of delivery in Gloucester was low with only 1,200 sqm delivered each year, a stock growth rate of 0.5 percent/year. This reflects the very constrained nature of Gloucester’s supply which has resulted in the delivery of office space in neighbouring areas such as Tewkesbury (Gloucester Business Park) and Stroud (Quedgeley).
- Most office development was for mid-sized/larger properties of 2,000-5,000 sqm,

although the majority of take up of offices was for smaller suites of 0-500 sqm

- Local office stock was well occupied in 2020, with an average vacancy rate, for the county of only 2.6 percent, offering little choice for businesses.
- Identified employment land needs, for the Joint Core Strategy Area, over 2020-2040, were 74.7-82.9 ha for offices/R&D uses and 97.7-113.0 ha for industrial/warehouse uses.

Strategic and Local Plan Area

Gloucester, Cheltenham and Tewkesbury Joint Core Strategy 2011 – 2031 (Adopted December 2017)

2.57 The Joint Core Strategy (JCS) currently provides strategic planning policy for the joint local authority area of Gloucester City, Cheltenham Borough and Tewkesbury Borough and will be replaced by the SLP when it is adopted. The JCS Vision is that: "By 2031 Gloucester City, Cheltenham Borough and Tewkesbury Borough will have continued to develop as highly attractive and accessible places in which to live, work and socialise."

2.58 "The Joint Core Strategy area will be recognised nationally as enjoying a vibrant, competitive economy with increased job opportunities and a strong reputation for being an attractive place in which to invest. The character and identity of individual communities will have been retained while improved access to housing will have addressed the needs of young families, single people and the elderly."

2.59 "New developments will have been built to the highest possible standards of design and focused on protecting the quality and distinctiveness of each community. Established in sustainable locations, without increasing the risk of flooding, they will have been designed with sensitivity towards existing villages, towns and cities and with respect for the natural and built environment."

2.60 As a result of a strong commitment to the housing and employment needs of the existing and growing population, all residents and businesses will benefit from the improved infrastructure, which will include roads, public transport and services, and community facilities."

2.61 Ambition 1 of the JCS is a 'A thriving economy'. Within this are three objectives:

- "Strategic Objective 1 – Building a strong and competitive urban economy – Develop the potential of the JCS area for further economic and commercial investment" particularly by "Providing the right conditions and sufficient land in appropriate locations to support existing businesses and attract new ones, particularly from the major high-tech and knowledge-based industries, tourism, retail and the leisure sector, to rebalance the local economy away from its public sector dominance, improve the area's economic resilience, support a highly-skilled workforce and continue to provide a focus for economic growth within the county"
- "Strategic Objective 2 – Ensuring vitality of town centres" – Including providing sufficient employment uses and "prioritising the delivery of key regeneration sites"
- "Strategic Objective 3 – Supporting a prosperous rural economy – Facilitate rural employment generation and diversification by: Supporting the needs of agricultural businesses, encouraging farm diversification, the development of small rural business units, the conversion of existing buildings for rural business use, appropriate expansion of existing businesses and home working."

2.62 'Policy SP1: The Need for New Development' identifies a requirement, to 2031, "for approximately 35,175 new homes and a minimum of 192 hectares of B-class employment land to support approximately 39,500 new jobs." 'Policy SP2: Distribution of New Development' notes that At least 84 ha of the 192 ha employment land requirement will be delivered on the Strategic Allocation sites noted below. "Any further capacity will be identified in District plans."

2.63 'Policy SD1: Employment – Except Retail Development' notes that relevant "Employment-related development will be supported:

i. "At Strategic Allocations, in line with Policy SA1, where it is expected that employment land should normally be used for B-Class uses, except where it can be demonstrated that non B-Class uses would support the residential and B-Class development at that Strategic Allocation. In order to support key growth sectors or other key local economic drivers, on some Strategic Allocations, priority will be given to specific sectors as set out in the SA site policies
ii. At locations allocated for employment use within the Development Plan
iii. For the redevelopment of land already in employment use, or when the proposal involves a change of use from non B-Class employment uses to B-Class uses where the proposal is of appropriate scale and character

iv. For the development of new employment land within Gloucester City, the Principal Urban Area of Cheltenham and Tewkesbury town

v. In rural service centres and service villages where proposals for small- scale employment development will be supported if they are of an appropriate size and scale

vi. In the wider countryside when it is:

a) located within or adjacent to a settlement or existing employment area and of an appropriate scale and character

b) employment-generating farm diversification projects, which are of an appropriate scale and use, particularly where they involve the re-use of appropriate redundant, non-residential buildings

vii. Where it allows the growth or expansion of existing business especially in the key growth sectors, subject to all other policies of the plan

viii. Where it would encourage and support the development of small and medium sized enterprises, subject to all other policies of the plan.

2.64 'Policy SA1: Strategic Allocations Policy' identifies the seven Strategic Allocations and the housing and employment land they will provide to 2031:

- Policy A1: Innsworth and Twigworth – 9.1 ha of employment land and 2,295 homes
- Policy A2: South Churchdown – 17.4 ha of employment land and 1,500 homes
- Policy A3: North Brockworth – 3.0 ha of employment land and 1,100 homes
- Policy A4: North West Cheltenham – 23.4 ha of employment land and 4,285 homes. Here the employment land is proposed to comprise a 10 ha E(g) office park with the remainder comprising predominantly non E(g)/B-Class employment generating land for local centre(s)
- Policy A5: Ashchurch – 14.3 ha of employment land, no homes
- Policy A6 Winneycroft – No employment land, 620 homes
- Policy A7 West Cheltenham – 45.0 ha of employment land and 1,100 homes. The employment land will be focussed on "a cyber security hub and other high technology and high 'Gross Value Added' generating development and ancillary employment uses." N.B. This is also referred to as the 'Golden Valley' and incorporates the Cyber Central scheme.

2.65 Overall, 112.2 ha of employment land and 10,900 homes are proposed within the Strategic Allocations. "Development proposals should enable a comprehensive scheme

to be delivered across the developable area within each Strategic Allocation" and proposals should include a masterplan and appropriate transport, infrastructure and greenspace strategies.

Local Regional Economic and Planning Policy – Cheltenham

2.66 This sub-section reviews the relevant policy documents of Cheltenham. It is split between planning and economic policy, and the evidence base which informed planning policy and economic development.

Planning and Economic Policy

Cheltenham Plan (2020)

2.67 The Cheltenham Plan, together with the JCS (discussed above), the Gloucestershire Minerals and Waste Local Plans and any neighbourhood plans made in the future will, when adopted, comprise the statutory development plan for Cheltenham up to 2031. These documents will be replaced by the SLP, when it is adopted. Within the Cheltenham Plan, 'Vision Theme B' is that "Cheltenham is a place with a prosperous and enterprising economy where education, skills and employment opportunities are increasing and diversifying, where businesses choose to invest and deliver increased value of economic output, and where the benefits are felt by all."

2.68 In terms of employment, Policy EM1: Employment Land and Buildings identifies seven sites to be safeguarded for employment purposes (E(g)/B-Class or appropriate Sui-Generis):

1. Runnings Road (Kingsditch Trading Estate, Block 1 and Blocks 5-7)
2. Gloucester Road, Benhall (GCHQ)
3. Jessop Avenue / St. James Square
4. New Barn Lane (UCAS)
5. Tewkesbury Road (Block 1)
6. Cheltenham Trade Park
7. Hatherley Lane (The Reddings)."

2.69 These Employment Areas, along with other identified industrial estates and business parks in Cheltenham are reviewed in Section 5.0.

2.70 Four other sites are identified for new employment (E(g)/B-Class or appropriate Sui-Generis):

a. “Land south of Jessop Avenue, Town Centre (E1)
b. Land adjacent to B&Q, The Reddings (E2)
c. Land north-west of Grovefield Way, The Reddings (E3)
d. Land at Chelt Walk, Town Centre (E4) .”

2.71 These Employment Sites, where they remain available for development are reviewed further in Section 5.0.

2.72 Policy EM1 also provides policy on when a change of use of land, from E(g)/B-Class uses to alternative uses would be appropriate, stating that “development proposals for a change of use of land and buildings currently or last in employment use…on key existing employment sites will not be permitted except where:

a. The proposed use is Sui Generis but exhibits characteristics of traditional B1, B2 or B8 employment uses
b. The proposed use provides new high-skilled jobs such as those associated with knowledge-based service and technology industries
c. The applicant can demonstrate in exceptional circumstances that a key existing employment site has no reasonable prospect of remaining in employment use.”

2.73 Policy EM2: Safeguarding Non-Designated Existing Employment Land and Buildings broadens the above policy to also protect other buildings and land, currently or last in, employment use, unless:

a. The buildings were constructed and first occupied for residential use
b. The loss of the site to other uses does not have a detrimental impact on the continuing operation of existing businesses in the vicinity, and delivers other economic benefits
c. The applicant “can demonstrate that employment use creates unacceptable environmental or traffic problems which cannot be satisfactorily resolved.”.”

2.74 Policy EM4: Promoting the Cyber-Security Sector notes that “development proposals for businesses that support cyber security activities will be favoured subject to the proposal being appropriate to the location concerned and being in accord with other relevant policies embodied within the Development Plan.”

2.75 Policy H2: Land Allocated for Mixed-Use Development identifies four sites suitable for mixed use development, which may include E(g)/B-Class employment in the case of MD1

Lansdown Industrial Estate. MD3 Royal Well and Municipal Offices (0.9 ha) is allocated for "Mixed-use redevelopment appropriate for town centre uses", which could include offices. Both sites are reviewed further in section 5.0.

Golden Valley Development Supplementary Planning Document (2020) (and the Cyber Central Vision)

2.76 The Golden Valley Development is the new name for the A7: West Cheltenham the strategic allocation site in the JCS, which allocates 45 ha of employment land. It also includes the 22ha Hayden Sewage Treatment Works, which is presently safeguarded for long term growth under JCS Policy SD5: Green Belt and cannot be developed at this time unless released in a future development plan (some of these site allocations will be superseded by new allocations in the SLP, when it is adopted). Golden Valley also includes new residential development and as well as Cyber Central UK. It will deliver a new community "that combines world-class cyber business and academic facilities, exemplar housing and state-of-the-art amenity and leisure facilities in a highly accessible and environmentally sustainable development."

2.77 The full 132 ha allocated Golden Valley site extends from the A4019 in the north to Pheasant Lane in the south. It borders the residential communities of Hester's Way, Springbank and Fiddler's Green to the east. The Supplementary Planning Document (SPD) provides further guidance and details on the policies for the Golden Valley set out in the relevant Development Plans. Relevant parts of the SPD Vision include:

> "The Golden Valley Development creates a vibrant pioneering community integrating hi-tech business, residential and leisure uses. At its heart the UK home of cyber, digital and creative sectors arising from Cheltenham's international reputation for leadership in cyber innovation. This is a sector that is experiencing rapid growth. The ability for the industry to scale-up is essential to maintain and enhance the UK leading role. With a significant development site adjacent to GCHQ in a highly accessible location with great connectivity, the opportunity exists to create a destination of global significance...
>
> Cyber Central UK will be the national home of hi-tech innovation, nurturing an environment of creativity and collaboration. It is a place where this deep

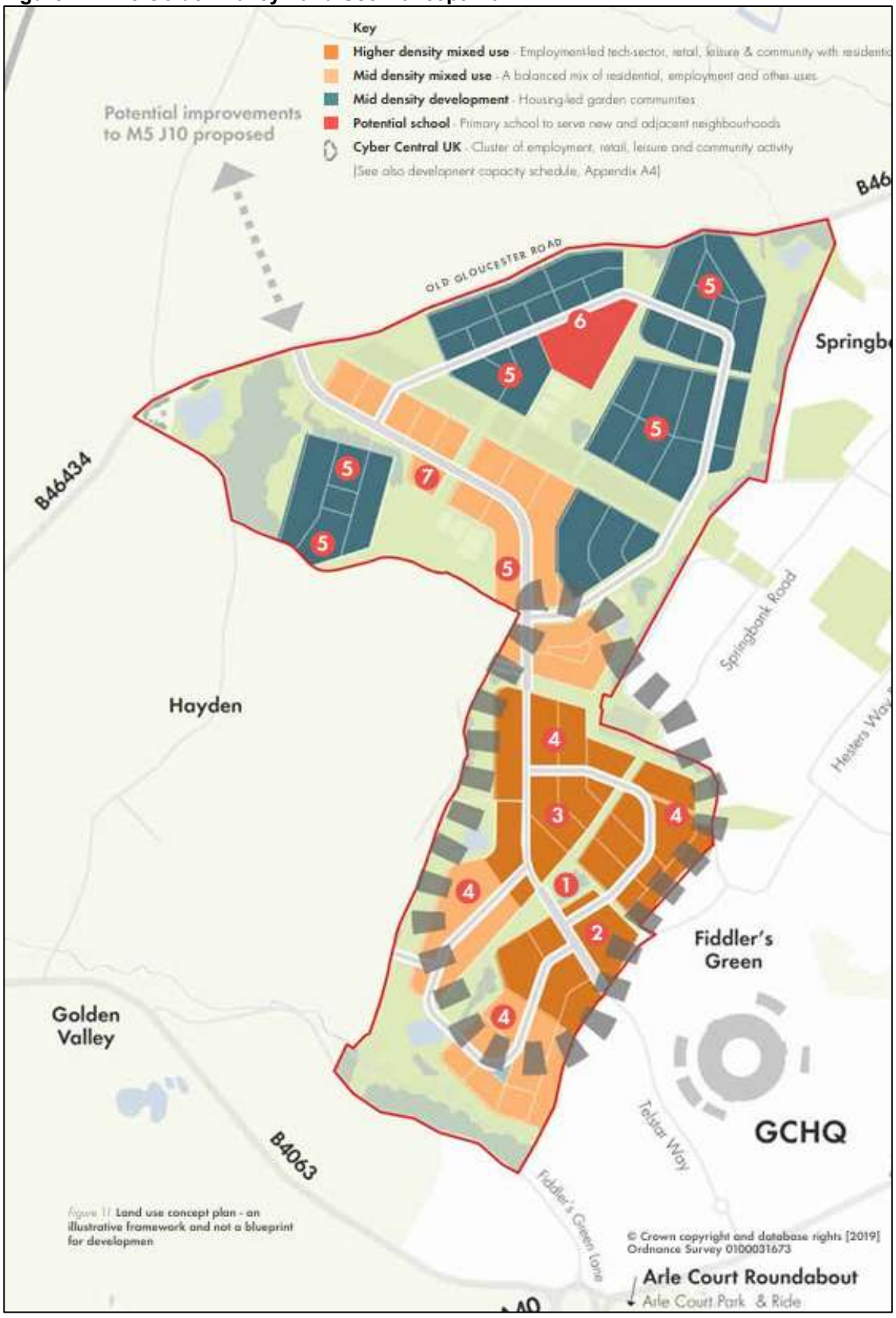
rooted pioneering culture thrives; a place where the boundaries of innovative thinking are constantly pushed. A place that bright minds and young talent co-create and want to live."

2.78 Objective B of the SPD is that "Cyber Central UK, a new and unique dedicated campus for the cyber-tech community, will be the focus of a vibrant, integrated, inclusive and diverse range of uses and activities, serving existing and new communities at densities which make effective use of land."

2.79 Figure 1 shows the Land Use Concept Plan for the SPD. Proposed uses are:

1. Cyber Central UK, a mixed-use campus of business, enterprise, R&D and education activities within the cyber-tech sector. It could provide up to 186,000 sqm (2 million sqft) of space on 45 ha, supporting some 7,500 jobs. It will offer a range of property types to support business through their growth lifecycle
2. Innovation Centre, providing a mix of workspaces for the cyber-tech community, with links to higher education institutions
3. Retail, services and community uses
4. A mix of sites and locations which will provide opportunities for inward investment, which may form part of the cyber-tech supply chain.
5. Residential neighbourhoods
6. A new primary school
7. Open market employment spaces of varying sizes.

Figure 1 – The Golden Valley Land Use Concept Plan



Source: Cheltenham Borough Council, 2020

Economic Development Strategy for Cheltenham 2007 – 2017 (2007)

2.80 This Economic Development Strategy has the vision "To enable Cheltenham to have a thriving and prosperous economy whilst enhancing our environmental and social fabric." Its Objectives are:

1. "To increase business investment:
   a) To continue to develop liaison work with key employers
   b) To raise the profile of Cheltenham as an investment opportunity.
2. To ensure that investment can be accommodated within environmental goals:
   a) To ensure that there is an adequate range of business premises for inward investment and business expansions
   b) Sustainable transport infrastructure to meet visitor and business needs.
3. To address employment needs and opportunities:
   a) To work with educational partners to meet the employment need
   b) Support job opportunities for all
   c) To support economic regeneration and economic participation in disadvantaged areas.
4. To support growth sectors within Cheltenham:
   a) To remove barriers to green industries and support their growth
   b) To realise the economic potential of the Creative Industries Sector in Cheltenham.
5. To create an entrepreneurial culture and to support small business growth:
   a) To provide and promote coherent, accessible support
   b) To have adequate facilities for business start-up and micro business growth."

Planning and Economic Evidence Base

Cheltenham Employment Land Review (2007)

2.81 This Study is now nearly 20 years old, and its conclusions on the local property market and employment land need (some 30 ha to 2026 or 1.5 ha/year) are now dated. However, it is worth highlighting that the study reviewed 84 developed and undeveloped employment sites, totalling 174 ha. 19 sites were found to be of very good quality and 42 were of good quality. These sites occupy a total of 150.5ha or 86 percent of the total area. 18 sites were found to be of average quality (21.8ha) and only 5 of poor quality (1.7ha). "Very good and good sites are generally larger, have good strategic and local road access, fewer incompatible uses nearby, a prominent or otherwise attractive location and tend to

have more modern premises and lower vacancy rates. By contrast, the poorer quality sites tend to be smaller with older buildings in a poor condition, would be more distant from major trunk routes and/or with constrained local access and would tend to have a less attractive local environment. These sites continue to serve an economic role however, and none were recommended for release to other uses.

2.82 In terms of new employment land to meet needs, at this time Cheltenham had a limited supply. The main growth opportunities were:

- Town Centre (offices) – Focused on Winchcombe Street/Albion Street; North Place/Portland Street; and Royal Well
- Leckhampton (5 ha, office/light industrial)
- Grovefield Way (5.1 ha, Office) – Then proposed for a business park scheme
- Fiddler's Green (8 ha, industrial)
- West Kingsditch (9.75 ha, industrial)
- North West Urban Extension (10 ha, office/industrial).

2.83 Key growth sectors, at this time at least, included:

- Leisure and Tourism – Building on Cheltenham's heritage as well as cultural and sporting
- Advanced engineering – "Cheltenham has a strong concentration in advanced engineering and future investment is expected to build upon existing skills and companies
- ICT – The town's profile in respect of the availability of skilled staff, opportunities for clustering, connections with the University and the quality of life each contribute towards its potential as a growth location for ICT activities
- Creative Industries – "Building upon the existing media hub and the profile of Gloucestershire College, there is scope for further expansion in the creative sector which includes architecture, the media, arts and crafts and the performing arts."
- Financial Services – With growth in professional services and insurance and a focus upon Head Office functions
- Environmental Technology – Growth opportunities are in consultancy firms and waste handling and management facilities
- Biotechnology – There is good potential for further growth in biotechnology, through the provision of incubator and 'move on' space within an enterprise park environment

- Distribution and Wholesale – Whilst Cheltenham is not suited to large scale logistics operations, it could support smaller scale facilities
- Public Administration and Defence – Building on GCHQ.

Cheltenham Economic Strategy: Developing Cheltenham as a Business Location (2015)

2.84 This report summarises the analysis and findings of a consultancy project undertaken to support the provision of an economic strategy for Cheltenham, focusing on the Borough's role as a business location. As part of the research, stakeholders noted the ongoing attractiveness of Cheltenham as a business location, with high quality of life. However, the borough's role as location for company headquarters has reduced over time. In terms of the premises, the main shortage is for medium-to-large high-quality modern offices, light industrial spaces and larger industrial option of 1,000 sqm or more. Cheltenham particularly lacks a modern business park, while existing business parks and industrial parks also require upgrades and improvements to attract higher value uses. However, current office rental values are too low to attract speculative developments.

2.85 In terms of key sectors, stakeholders felt that "Growth in future premises/site uses would seem to be focused on the industries/activities of defence industries (public administration, related to GCHQ); ICT and digital; business and professional services; retail; visitor accommodation; leisure; and light industrial."

2.86 Other issues noted include a need to boost GVA in the town to achieve JCS targets and improve the profile of businesses in Cheltenham. Cyber Security remains a key sector for the borough with a range of growth opportunities emerging from the GCHQ supply chain. "There are opportunities from expanding activities in the cyber-security sector, but also in any spin-off or associated ICT, digital and technology activities which may have a complementary use for the skills, specialisms and market contacts of the existing cyber security sector."

2.87 In terms of land and property, the needs of specific businesses and sectors will need to be considered. It also will require the consideration of the expansion or supply chain needs of large employers such as GCHQ. "The quality of existing sites and premises needs to be improved, including where appropriate, support for relocation of existing businesses to new high quality locations. This may include consideration of supporting

uplift in values of existing sites to residential to release investment. Existing industrial sites should be upgraded to improve their market attractiveness and offer. Upgraded sites have the potential to improve Cheltenham's Gross Value Added (GVA) performance and attractiveness to the sectors of defence/ cyber security; ICT and digital; business and professional services; retail; visitor accommodation; leisure; and light industry. An active strategy for sites and land assets will help to maintain employment levels and to reduce prospective increases in commuting frequencies and distances."

2.88 Table 8 shows the proposed Strategic Priorities and objectives for growth, set out in the Strategy.

Table 8 – Proposed Strategic Priorities and Objectives

Strategic Priority	Objectives	Comments
1. Cheltenham Means Business	a) Strategy to communicate existing positive news and progress to business community	
	b) Develop and implement business engagement and advocacy measures	
2. Cyber-Security Cluster	c) Develop and implement a cyber-security business initiative	GCHQ and its supply chain provide the opportunities to further promote and grow a knowledge- and technology- based niche within Cheltenham and the wider county. There are some short-term opportunities for providing suitable sites and premises for new or expanding suppliers to GCHQ as well as potential opportunities for existing or new SMEs in this industry cluster
3. Strategic Management of Assets to Deliver Prosperity and Quality of Life	d) Enable the development and delivery of a choice of high quality business premises at scales that the market requires	This is required for long-term viability as a leading business services and technology employment location. There is a noted lack of large-scale high grade office space and high quality business parks in Cheltenham. In the past this has led to missed opportunities in terms of business location and expansion.
	e) Review the value and current use of local authority and government owned assets	Market analysis suggest strong requirement for town centre as well as greenfield opportunities for business. There are a number of significant local authority and government land holdings and assets. The value and current use needs to be re-assessed in order to appraise how they could be better used (e.g. release of sites or premises for business use or housing development).
	f) Develop positive criteria based approach to safeguarding key assets whilst recognising opportunities to redevelop sites, releasing capital and supporting wider business investments	The Sites Typology analysis in the Cheltenham Employment Sites Review highlights a number of key opportunities to deliver higher value growth that meets market needs. There are a number of sites with ageing, sometimes vacant buildings which have poor access and have constraints due to their location within primarily residential environments. The current uses need to be reassessed; opportunities for value uplift explored including upgrading or redevelopment of sites for alternative uses.
4. Design and implement vehicles for delivering land, premises, housing and infrastructure	g) Develop one or more special purpose vehicles for infrastructure, land and premises development	There may be a significant opportunity from using the potential surplus value to be gained from local authority land holdings to forward fund strategic infrastructure and the servicing of development sites.
	h) Collaborate with Tewkesbury Borough Council to establish the vision and ambition, strategic	Much of the land for proposed development is in Tewkesbury Borough Council. In order to manage and deliver the high quality developments and solutions

Strategic Priority	Objectives	Comments
	management, delivery mechanisms and arrangements for urban extension developments	appropriate to the long term needs of Cheltenham and Tewkesbury, it may be necessary to collaborate resources and expertise.
	i) Establish a project pipeline for the most important 2 or 3 infrastructure, land and property projects.	

Source: Cheltenham Borough Council, 2015

Local Regional Economic and Planning Policy – Gloucester

2.89 This sub-section reviews the relevant policy documents of Gloucester. It is split between planning and economic policy, and the evidence base which informed planning policy and economic development.

Planning and Economic Policy

Gloucester City Plan 2011–2031 (Adopted January 2023)

2.90 The Gloucester City Plan (GCP), together with the JCS (discussed above), Gloucestershire Minerals and Waste Local Plans and made neighbourhood plans comprise the statutory development plan for Gloucester up to 2031. Relevant documents will be superseded by the SLP when it is adopted. Relevant parts of the GCP Vision state that: "During this time significant progress will have been made in the regeneration of the City Centre and elsewhere within Gloucester…. Gloucester will grow as an economy and make a significant contribution to the wider economy of Gloucestershire, building on its strengths as a business location, whilst supporting business growth and expansion within the city itself."

2.91 Policy B2: Safeguarding Employment Sites and Buildings protects industrial estates and business parks in the city. Proposals for the change of use of E(g)/B-Class premises, to other uses, will only be supported where the following criteria are met:

1. "The site or premise is redundant or no longer fit for purpose or capable of meeting employment needs
2. Alternative local employment facilities of an equivalent standard can be provided without adversely impacting on the operation of the existing business and its accessibility to existing employees
3. The proposal would not adversely impact on the continued use of adjacent employment uses
4. The proposal would bring significant benefits to the local economy and/or community that would demonstrably outweigh the loss of employment land."

2.92 Policy B3: New Employment Development and Intensification and Improvements to Existing Employment Land' indicates that proposals for the development of new employment premises, or intensification on existing employment sites will be supported where:

1. "Any increase in traffic can be accommodated by the transport network
2. Satisfactory vehicular access, parking and manoeuvring space can be provided
3. The proposal would not result in significant adverse impact on the amenity of neighbouring uses, particularly residential properties and it would not place unreasonable operational restrictions on adjacent existing or allocated land uses
4. The scale and design of the proposal is compatible with the character of the location
5. It would not result in unacceptable adverse environmental impacts, for example in terms of noise, air, water, soil or light pollution
6. Provision is made for the delivery of efficient and effective commercial waste collection services."

2.93 Proposals for limited development outside these uses will be supported where they are ancillary / complementary to the primary use of the site.

2.94 In terms of site allocations, most are for housing and associated uses. Those which include E(g)/B-Class uses are:

- SA07: Former Quayside House, Blackfriars (1.6 ha) – Allocated for Class E(g)(i) offices, Combined GP Practice, Pharmacy, Residential (approx. 50 dwellings)
- SA08: Former Fleece Hotel and Longsmith Street Car Park (1.6 ha) – Allocated for main town centre uses, including approximately 25 residential units
- SA14: Land South of Triangle Park (Southern Railway Triangle) (4.2 ha) – "Class E (g) (office, research and development, or any other industrial process that can be carried out in a residential area without detriment to amenity only) and/or B8 Class (storage and distribution) employment use"
- SA18: Part of West Quay, the Docks (0.7 ha) – Main town centre uses, including approx. 20 dwellings.

2.95 Relevant sites are reviewed further in Section 6.0.

Regeneration and Economic Development Strategy 2016-2021 (2016)

2.96 The Gloucester City Vision, as adopted in 2012 is that: "Gloucester will be a flourishing, modern and ambitious city, which all residents can enjoy" A central part of that Vision is to deliver:

- "A flourishing economy and city centre
- A vibrant evening economy

- A city which improves through regeneration and development."

2.97 The City Council will support this vision through:

1. "Clearly identified objectives within this strategy including:
   a) The delivery of major investment sites complemented with smaller scale opportunities
   b) Creating a vibrant city centre area
   c) Delivering jobs and growth
   d) Influencing growth beyond our boundaries.
2. Ensuring a positive planning environment
3. Encouraging investors and developers to work together in a complementary way to deliver our overall vision
4. Using our heritage assets to deliver growth, including delivering more activity around our waterways and our historic city centre streets
5. Using public sector assets, influence and expertise to encourage development
6. Working within an engaged and informed political landscape
7. Strong cross-party political support
8. Setting ambitious targets to deliver a stronger future for Gloucester."

2.98 Table 9 sets out relevant Strategy Objectives and associated projects.

Table 9 – Regeneration and Economic Development Strategy Objectives and Projects

Strategy Objectives	Relevant Key Projects
Objective 1: Delivering Major Development Sites	i Kings Quarter Regeneration scheme: delivering the "step change" in the city centre, to include retail and leisure components that reflect the aspirations of a modern city
	ii Blackfriars Project, including the former Fleece Hotel – regenerating this large brownfield site to provide vibrant mixed use of employment, residential, leisure, open space and parking development, thereby creating a seamless linkage between the historic docks and the city centre, including the regeneration of the historic Fleece Hotel site
	iii Gloucester Quays and Gloucester Docks: working with partners to complete this important regeneration scheme including the development of a water-based regeneration programme and the redevelopment of the remaining historic warehouses. Within the defined area, deliver a programme of sites, which cumulatively will make a major impact, to include: • Baker's Quay – mixed use scheme • Llanthony Priory – a potential Heritage Lottery Funded scheme • 27/29 Commercial Road – buildings owned by the City Council • Orchard Square – the delivery of an exciting new public square • West Quay – promoted by the Canal and River Trust.
	iv Canal Corridor – define and deliver a clear vision for this strategically important employment/ housing corridor
	v Railway Triangle and Corridor – exploration of options for delivery of local housing and employment on the linked corridor sites
Objective 2: A Vibrant City Centre	ii Promote sustainable alternative uses including the development and delivery of an office accommodation strategy
Objective 3: Small Sites	i Develop and continually review a priority list of sites and buildings which will be targeted for action, working with the property owners, to assist them to regenerate those properties using all the tools at their disposal
Objective 5: Jobs and Growth	i Working closely with the University of Gloucestershire's Growth Hub and Business School, targeting high growth key sector companies through targeted inward investment campaigns to reach over 5,000 potential investors, including developing appropriate marketing materials and channels
	iii Identifying key issues impacting on our businesses, such as broadband, and work constructively to find solutions and deliver growth
	iv Deliver business grants to assist new start-ups, expanding businesses and those businesses looking to relocate to the city. Extend business start-up / business support provision for small-medium sized businesses (SMEs) through Gloucestershire Enterprise Ltd, Gloucestershire Adult Education, The Prince's Trust and other partners
	v Work towards the delivery of mechanisms supporting growth including identifying an appropriate location for, and delivery of, a locally defined Enterprise Zone, supporting the establishment of a Business Improvement District.

Strategy Objectives	Relevant Key Projects
Objective 8: Work in Partnership with Gfirst and Adjoining Local Authorities to Influence and Achieve Opportunities for Growth Beyond our Boundaries	i Support the delivery of strategic housing and employment sites outside of the city's boundary
	ii Actively support and promote the delivery of Joint Core Strategy sites allocated outside of the city's administrative boundary but which can play a role in the growth and prosperity of Gloucester.

Source: Gloucester City Council, 2016

Planning and Economic Evidence Base

Strategy Options for the Gloucester Economy (2017)

2.99 This report provides a set of insights and recommendations to inform a new economic strategy for Gloucester. There is a particular focus on land use and site needs to help inform the new City Plan. The relevant recommended Priorities and Actions are set out in Table 10.

Table 10 – Strategy Options for the Gloucester Economy, Priorities and Actions

Priority	Relevant Delivery Ideas
Business	
A1: Improve business start-up and growth rates	Support for Growth Hub, added services or resources to existing business support initiatives
A2: Consolidate support for the engineering and manufacturing sectors	Manufacturing and Engineering industry leadership board – to ensure coordination of views and understanding of needs Improved branding and marketing of the industrial capabilities, activities and offer Support for employment land and planning designations for engineering and manufacturing Engineering and manufacturing incubator – with access to: • Managed workspace • Prototyping and workshop facilities • Mentors / non-exec directors.
A3: Advocacy and partnership in cyber security initiatives	Cyber security international industry conference Working closely with Cheltenham Borough Council and GFirst LEP, develop a cyber security industry leadership forum (involving GCHQ, HM Government, Local authorities, supply chain interests, real estate interests)
A4: Creating and promoting the city centre 'rich mix'	Visioning workshops on creative ideas – e.g. themed 'city quarters', creative industries, strategic phases of development that will build footfall and confidence. Producing a City Centre Regeneration Strategy and Delivery Plan
People	
B2: Engineering and manufacturing skills provision	Manufacturing and engineering skills initiative or academy: • Utilise existing Engineering Training Centre • Partner with University that has excellence in undergraduate and graduate skills programmes for engineering, and with a good reputation for working with industry.
B3: Place-making to attract and retain talent should be a significant part of land use and regeneration strategies	Planning policies and regeneration projects. Major regeneration and development activities develop and implement employment and skills plans. Opportunity to develop local employment and training initiatives linked to major regeneration developments.
Place	
C1: More clearly articulate the economic priorities for administrative area of Gloucester and the areas close to the City boundary as part of the wider Joint Core Strategy Area	Continued and extended support for existing employment land opportunities and planning designations to meet short term business needs. Strategic sites study, start with most market viable sites that have no major contingencies such as long term infrastructure upgrades. Identify criteria through planning policy to safeguard key business locations and sites.

Priority	Relevant Delivery Ideas
C2: Prioritising key interventions that will have most impact	
C3: Improving the place making role of the City Plan to provide a cohesive, market driven regeneration programme	City Centre Regeneration Strategy and Action plan. One that is practical, considers plot and site use and the phasing of development. Designation of themed city centre quarters and industrial parks might be a useful communications and marketing device for planners, investors, developers and businesses – e.g. “Gloucester cyber-quarter” “Gloucester Meteor Technology Park” “Whittle Engineering Academy” “Gloucester Station Gateway”.
C4: Improving the intelligence on key sectors and their spatial requirements and appraisal of policy options	Business Forum for infrastructure, sites and premises Developers and commercial interests forum – a network for property and planning related interests.
C5: Implementing initiatives to build interest in the city centre and test the market for new businesses and roles	Temporary ‘pop-up’ business incubators / workspace. Focus on businesses that are knowledge-based, innovative, are useful additions to services to support commercial and business operations in the centre.

Source: Gloucester City Council, 2017

Gloucester City Employment Land Review (2019)

2.100 To support the GCP (discussed above), this Study reviewed 76 existing employment locations within the city, providing a health check of sites and premises. Overall, these locations were performing well in 2019 with occupancy levels at 80-100 percent. 61 percent of the occupied stock was in E(g)/B-Class uses.

2.101 Demand for good quality stock remained strong, with evidence of business expansion within the areas, and no location was felt to be failing to meet some market needs. "The higher quality business parks and industrial estates tend to be to the north and south of the city, in locations such as Barnwood and Quedgeley, closest to the main trunk road network and M5 motorway. Within the urban core, areas that developed around the Victorian and early 20th Century tend to provide lower quality accommodation, with poorer access arrangements and environment. That said, they are well occupied and provide affordable accommodation to meet the diverse needs of the Gloucester economy."

2.102 "Overall, it can be concluded that Gloucester's existing stock of employment land remains strong, fit for purpose, providing a range of different types, quality and location that meets business needs and should be protected for that purpose…the policy approach should therefore support proposals for the expansion / intensification of existing employment land and uses where it would not have a significant adverse impact on the surrounding area."

Local Regional Economic and Planning Policy – Tewkesbury

2.103 This sub-section reviews the relevant policy documents of Tewkesbury. It is split between planning and economic policy, and the evidence base which informed planning policy and economic development.

Planning and Economic Policy

Tewkesbury Borough Plan 2011 – 2031 (Adopted June 2022)

2.104 The Tewkesbury Borough Plan together with the JCS (discussed above), Gloucestershire Minerals and Waste Local Plans and made neighbourhood plans comprise the statutory development plan for Tewkesbury up to 2031. Relevant documents will be superseded by the SLP when it is adopted. Its Vision is: "Tewkesbury borough, a place where a good quality of life is open to all, where our environment and heritage assets are cherished, a sufficient supply of homes is available and where a thriving economy supports healthy

and happy communities."

2.105 Policy EMP1 Major Employment Sites identifies the following as 'Major Employment Sites', which can support E(g)/B-Class uses:

- Bishops Cleeve – Cleeve Business Park, Malvern View Business Park (Including a 2.24ha extension allocated on adjacent land)
- Brockworth – Gloucester Business Park
- Churchdown/Staverton – Staverton Technology Park, Meteor Business Park, Ashville Business Park (Planning permission granted for 3.5ha extension), Bamfurlong Industrial Park (Planning permission granted on 5.9ha of adjacent land)
- Innsworth – Innsworth Technology Park
- Tewkesbury Business Park - Tewkesbury Business Park, Ashchurch Business Park.

2.106 'Policy EMP2 Rural Business Centres' identifies 14 locations as 'Rural Business Centres' for rural economic development, along with 13.7 ha of additional employment land in these centres:

- Ashchurch Rural – Homedowns Achievement Park, Newton Farm Business Park
- Bishops Cleeve – Homelands Farm (including a 1.68 ha extension)
- Elmstone Hardwicke – Highfield Farm (including a 3.3 ha extension)
- The Leigh – Knightsbridge Business Centre
- Gretton – Park Farm Industrial Estate (including a 1.35 ha extension)
- Highnam – Highnam Business Centre (including a 1.9 ha extension)
- Maisemore – The Steadings
- Toddington – Orchard Industrial Estate
- Twigworth – Twigworth Court
- Twyning – Brockeridge Farm Business Centre (including a 4.0 ha extension), Duddage Manor Business Park (including a 0.53 ha extension)
- Winchcombe – Isbourne Business Centre, Withytrees Farm (including a new allocation of 0.96 ha).

2.107 These Employment Areas, and associated employment development land, are considered further in Section 7.0.

2.108 Policy EMP3 Employment Sites within Settlement Boundaries notes that development proposals for E(g)/B-Class employment uses "within settlement boundaries but not on allocated sites", will be supported in principle, subject to the criteria set out in Policy EMP5 (see below).

2.109 Policy EMP4 Rural Employment Development indicates that with rural areas, proposals for new agricultural or E(g)/B-Class employment development will be supported where they:

1. "Involve appropriate agricultural development or diversification in accordance with agricultural policies
2. Involve the appropriate conversion of a rural building
3. Involve the redevelopment or expansion of established employment land or an existing business occupying the site
4. There are specific reasons why a rural location is necessary."

2.110 Policy EMP5 New Employment Development (General) notes that proposals for new employment development that are acceptable in principle in accordance with other policies will be permitted where:

1. Any increase in traffic can be accommodated by the existing transport network
2. There is provision for safe and convenient access by sustainable transport modes
3. Satisfactory vehicular access, parking sufficient to meet demand and manoeuvring space can be provided
4. The proposal would not result in an unacceptable adverse impact on neighbouring uses, particularly residential properties
5. The scale and design of the proposal is compatible with the character of the existing location and its setting paying
6. The proposal would not result in an unacceptable adverse environmental impact
7. Provision can be made for efficient and effective management of waste from the site.

2.111 Policy EMP6 Safeguarding of Employment Sites indicates that employment sites will be safeguarded for E(g)/B-class employment uses, unless it can be demonstrated that:

1. The site is no longer fit for purpose or capable of meeting employment needs and the proposal would not adversely impact on the viability of adjacent employment uses

2. The site is not appropriate for the continuation of its present, or any, employment use due to its negative impact on the environment or amenity of the surrounding area
3. The proposal would provide significant benefits to either the local economy, the sustainability of the community and/or the rural environment that would outweigh the loss of employment land.

2.112 Farm diversification, which could include the development of E(g)/B-Class uses is supported in Policy AGR2 – Agricultural Diversification Proposals where it enhances the viability of, and does not prejudice the continued operation of, the existing agricultural business.

2.113 Policy GRB2 – Gloucestershire Airport notes that "within the Non-Essential Operational Area, commercial development that would directly support the economic and operational viability of the airport uses will be supported."

2.114 Policy RET9 – Tewkesbury Town Regeneration identifies two sites in Tewkesbury Town Centre which might be suitable for a mixture of uses including employment (i.e. offices) – Healings Mill and Spring Gardens. These sites are reviewed further in Section 7.0.

Economic Development and Tourism Strategy 2024 – 2029 (2024)

2.115 The Economic Development and Tourism Strategy provides focus and direction for how Tewkesbury Borough Council will meet its objectives as set out in the Council Plan 2024 2029 of – Caring for People, Caring for the Environment, Caring for Place – and capitalise on the borough's strengths. The Strategy has four priorities:

- "Priority 1: Enabling business voice and key sector growth
- Priority 2: People and skills
- Priority 3: Creating a sustainable growth environment
- Priority 4: Promotion of place."

2.116 In terms of Priority 1, relevant aims include:

- "Aim 2: Support key and emerging growth sectors in the borough, supporting cluster growth and innovation.
- Aim 3: Encourage entrepreneurship and innovation across the borough."

2.117 In terms of Priority 3, relevant aims include:

- "Aim 1. Work with partners to ensure that the employment and business needs of the borough, including the need for key sector growth, are reflected in the employment land and business premises evidence base of the emerging Strategic and Local Plan.
- Aim 2. Work with partners to inform delivery of appropriate infrastructure, which supports sustainable employment and growth.
- Aim 3. Support the regeneration of retail centres across the borough, including key development sites and explore a more diverse range of uses.
- Aim 4 – Develop local business growth hubs."

Tewkesbury Garden Town Evolution of the Concept Plan (2021)

2.118 Following a successful bid in March 2019, the Tewkesbury area was awarded Garden Town status as part of a national Garden Communities Programme. The Programme seeks to achieve high-quality place making by developers, investors, local authorities and other partners. The proposal will ultimately deliver 10,195 homes and some 100ha of employment land. This Study is the latest iteration of the Garden Town Concept Plan.

2.119 Employment opportunities are focused around Ashchurch, Northway and the adjacent Business Park. "The area is regarded as a prime employment location with two existing business areas and has become renowned over the past 30 years for technology based industries, high tech engineering and distribution. Junction 9 of the M5 in particular has been recognised as an important business location, with access to Tewkesbury town centre in the west, Cheltenham and Gloucester in the south and Worcester in the north."

2.120 Reflecting this, new employment areas have been located in the south of the Garden Town. An employment area is proposed in the south east, in this masterplan. It assumes that a new A46 alignment route to the south would be completed to unlock development. An additional area of employment land between the M5 and the rail line and north of Fiddington is proposed. At the Ashchurch MOD site, it was announced that 15 ha in the east will be released for development (with the remaining 64 ha remaining in use for the MoD till at least 2040). This land could be used for a mix of uses, including employment as an early phase of development. Figure 2 shows the main Concept Plan, as of this Study.

Figure 2 – Tewkesbury Garden Town Concept Plan



Source: Tewkesbury Borough Council, 2021

2.121 The identified Employment Concept for the Garden Town will "need to capitalise on the prominent location next to the M5 and excellent access to major markets in Bristol and Birmingham. The employment strategy will enable existing businesses to expand, accommodate new inward investors and allow new businesses to grow. Through provision of flexible and readily available employment land this will continue to support a broad based economy which aids resilience whilst supporting key opportunity knowledge intensive sectors. Based on current activities and strengths the new business park should target Energy, Engineering, Cyber Security and Information Technology related sectors, building around existing anchor tenants with knowledge intensive and high value operations.

2.122 This creates an opportunity to develop a prominent high quality business park with a special focus on technology and innovation to complement existing mixed industrial and business areas. A new high quality employment park must deliver the range of supporting facilities and amenities that modern occupiers and workforce are looking for. Appropriate incubation or innovation centre type facilities should also be located on the park to support both new and existing enterprises with a technology and innovation focus.

2.123 Key business sectors which may occupy the employment land here could include:

- Advanced Engineering and Manufacturing (potentially including a Skills Training Centre of Excellence and growth hubs)
- Cyber and Digital Technology (as a supply hub for the Cheltenham Golden Valley) with a specialism in Data Management
- Agri Tech (building on nearby agricultural colleges).

Planning and Economic Evidence Base

Tewkesbury Borough Council Employment Land Review (2008)

2.124 This employment land review was undertaken to inform the then Core Strategy, identifying employment land needs and a realistic employment supply to meet those needs. Its findings on the local property market are now somewhat historic, but it generally found strong demand for employment sites and premises, due to Tewkesbury's proximity to surrounding major economic centres ranging from Worcester and Evesham in the north to Bristol in the south. Cheltenham and Gloucester were major driving forces in the local property market and there was a lack of employment land to meet needs, especially around Tewkesbury town.

2.125 The identified employment land requirement was 39 ha to 2026. To meet this need it was recommended that the Local Plan identify broad areas of further growth, which could form part of wider urban extensions.

2.126 Overall the Study identified 226 ha of developed and undeveloped land in employment use, in 26 Employment Areas. This included 20.8 ha of developable employment land. Of the 26 areas, most were performing well meeting local and sub-regional/regional business needs. Five - Uckington Retail Area, Postlip Paper Mill site, Isbourne Business Park, Orchard Trading Estate, and Duddage Manor Business Park – were of lower quality but still meeting business needs for local smaller rural space. Only Uckington Retail Park was recommended to be removed from the list of employment areas as it contains many non-E(g)/B-Class employment uses.

Tewkesbury Borough Employment Land and Economic Development Strategy Review (2016)

2.127 This employment land review provided an evidence base to "deliver the proposed levels

of economic growth at a local level and to provide for additional opportunities, and also to inform the policies and allocations in the emerging Tewkesbury Borough Plan. A further aim of the commission is to establish a clear evidence base to inform the development and future direction of the Council's Economic Development and Tourism Strategy for the period 2016-2020 and to identify key economic regeneration initiatives to maximise impact."

2.128 Overall, 101 employment areas and sites were reviewed including JCS strategic sites, local sites included in the Tewkesbury Strategic Assessment of Land Availability (SALA), existing plan allocations, extant planning permissions and potential new sites. The results of this analysis can be summarised as:

- Strategic JCS Allocations – The then eight JCS allocations (seven strategic sites plus North Churchdown) could provide 129 ha of deliverable land with Tewkesbury Borough, most of which was suited to all types of E(g)/B-Class employment use. 113 ha (87.6 percent) of the supply was classed as good/very good in quality. The 129 ha comprises 60 ha in Brockworth and part of South Churchdown, 49 ha in West of Cheltenham, North West Cheltenham, Innsworth and North Churchdown and 20 ha at MOD Ashchurch and Ashchurch Junction 9. Development sites ranged in size from 3.3 ha to 68 ha. However, the 129 ha also comprised all developable land in these sites, including land now allocated for housing and associated services
- SALA and other Allocated Sites – 37 SALA sites were reviewed giving a realistic land supply of 86 ha focused in the M5 Corridor, particularly adjacent to the Airport, at the Gloucester Business Park, at Bishops Cleeve and around Junction 9, M5. Development sites ranged in size from 0.2 ha to 26 ha. 87.8 percent of this land (75.5 ha) was rated as good/very good in quality and is again mostly suited for all E(g)/B-Class uses.
- Potential New Sites – 50 potential new sites were identified, focused on the M5 Corridor and Bishops Cleeve and with a realistic supply of 82.8 ha. The most deliverable sites were at Gloucester Business Park, at Toddington and along the A38 Corridor at Brockeridge and Highfield Business Parks. 47.0 percent of the supply (38.8 ha) was classed as good/very good in quality.

2.129 Overall, at this time, Tewkesbury had a maximum supply of 188.4 ha (12.56 ha/year over the plan period) of good/very good in quality land (excluding potential new sites) if all site

constraints were addressed. If they were not addressed that supply reduces to 29.0 ha (1.93 ha/year).

2.130 The Study also reviewed 50 developed Employment Areas (industrial estates, business parks, etc.) which had over 61,000 sqm of available industrial and commercial floorspace at the time of the Study, mostly in the M5 Corridor. 61,000 sqm represented 5.9 percent of the total supply of E(g)/B-Class accommodation in Tewkesbury Borough (1.04 million sqm) which was considered a reasonable level of available stock to meet needs.

2.131 The Study concluded that over the period 2005-2016, despite the national recession, Tewkesbury Borough has proved to be an attractive proposition for investors and developers. The borough saw 34.6 ha of employment land developed, mostly for E(g) uses. Overall 141,000 sqm of industrial and commercial floorspace was developed, (at a rate of 12,818 sqm/year), mostly along the M5 Corridor, on 3.15 ha/year. Over 2013-2016 property enquiries for 50,000 sqm of E(g) premises and 400,000 sqm of B2/B8 uses were recorded for Tewkesbury Borough. The view of stakeholders was that supply in the borough was reducing and that was a need for further developments along the M5 Corridor. Demand was for offices of 139-456 sqm, with a particular focus on the rural business parks. Industrial/warehouse demand was for units of 278-1,858 sqm, with larger B8 requirements extending up to 9,290 sqm. Over 90 percent of demand comes from local or sub-regional firms.

2.132 Office rents were £7-20/sqft (£75 - £215/sqm) and B2/B8 achieved £4-8/sqft (£43 - £89/sqm) which was considered strong for the time. The strongest office rents were in Gloucester Business Park, which was considered the prime location for businesses.

Summary

2.133 This section reviewed national, sub-regional and local reports and strategies that have a relevance to the allocation and need for employment land and premises. It particularly considered the key growth sectors for Cheltenham, Gloucester and Tewkesbury which are analysed further in Section 3.0.

National Policy

2.134 The NPPF (2026), Chapter 7 sets out policies (E1–E4) requiring local plans to support long-term economic growth by establishing proactive economic strategies, allocating

flexible sites for modern business needs (including technology clusters, logistics, and rural enterprises), avoiding overly prescriptive use restrictions, and giving substantial weight to the economic benefits of commercial and farm-improvement proposals. It also addresses freight and logistics siting requirements and rural business development, including guidance for developments located outside settlements. Chapter 12 covers effective land use through policies L1–L3, emphasising the importance of development on previously developed land, bringing vacant or underused land into use, and achieving appropriate densities, while also noting that Local Planning Authorities should not retain site allocations unlikely to be delivered within the plan period.

2.135 The 2020 Use Classes Order Amendment combines the B1 Office/Research/Light Industrial Uses along with the A and partly D1/ D2 use classes into a single 'E' Use Class. For the SLP Area, the practical effects are likely to include some greater pressure to convert town/city centre offices to other uses, although the market for many of those alternative uses is suppressed at this time. The Use Class change has no spatial considerations and therefore will apply outside of town centres as well. It thus has the potential to result in the introduction of non-office/non-industrial type activities, including retail, in out of centre business parks, and industrial estates, although this is a trend which has been ongoing for some time and can, in moderation, beneficially diversify local economic activity.

Sub-Regional Policy – County Wide

2.136 Gloucestershire's Local Growth Plan and Economic Strategy seek to build a strong business environment led by the high growth sectors outline below and supported by strong inward investment. This environment will need to be supported by flexible high quality workspace.

2.137 The Gloucestershire HENA notes that Gloucester has a sizable office market, but one that has seen low growth and a net loss of stock since 2011. Cheltenham has the highest-value office market in the County, with the highest rents (at £24.11/sqft (£260/sqm)) and strong historic growth. Gloucester has, however, seen a large loss in office space recently through conversions. Tewkesbury has a fast-growing office market focused on M5 corridor business parks, even if take up of space in the 2020s has been more modest. There is a strong, and growing industrial market in Tewkesbury (and Stroud) focused around the boundaries of Gloucester and Cheltenham and the M5 Corridor. Gloucester and

Cheltenham more generally, however, have seen net losses of stock and lower take up rates.

2.138 The HENA also identifies that the FEMA for Gloucestershire is largely limited to the county boundary, albeit with some links to South Worcestershire in the case of Cheltenham and Gloucester.

2.139 The recommended employment land needs, for the period 2024-2046, for the SLP Area are:

- Industrial – 673,900 sqm or 168.5 ha, equating to 30,600 sqm/year or 7.7 ha/year, with the allocation into each authority determined through joint planning.
- Offices – Between 109,600 and 206,200 sqm, or 28.9 and 41.2 ha with any allocation into individual authorities to be determined through joint strategic planning processes.

2.140 This is adjusted to the 20 year period 2026-2046:

- Industrial – 612,636 sqm or 153.18 ha (gross) in the SLP Area, equivalent to around 30,600 sqm or 7.7 ha/year, with the allocation into each authority determined through joint planning. Development should focus on the M5 corridor, with a particular need for strategic industrial land
- Offices – Between 99,636 sqm and 187,455 sqm, or 22.27 and 37.45 ha in the SLP Area, with any allocation into individual authorities to be determined through joint strategic planning processes.

Joint Core Strategy Area

2.141 The JCS identifies a requirement for 35,175 new homes and a minimum of 192 ha of B-class employment land to support approximately 39,500 new jobs. At least 84 ha of the 192 ha employment land requirement will be delivered on the Strategic Allocations, to 2031. The Allocations are:

- Policy A1: Innsworth and Twigworth – 9.1 ha of employment land and 2,295 homes
- Policy A2: South Churchdown – 17.4 ha of employment land and 1,500 homes
- Policy A3: North Brockworth – 3.0 ha of employment land and 1,100 homes
- Policy A4: North West Cheltenham – 23.4 ha of employment land and 4,285 homes
- Policy A5: Ashchurch – 14.3 ha of employment land, no homes
- Policy A6 Winneycroft – No employment land, 620 homes

- Policy A7 West Cheltenham (Golden Valley) – 45.0 ha of employment land and 1,100 homes.

Local – Policy Guidance and Evidence Base

2.142 The adopted local plans of the SLP Area authorities identify the following additional supply to meet identified needs, with further points raised in evidence base documents and related SPDs/Masterplans:

- **Cheltenham –** The Cheltenham Plan (2020) identifies seven sites to be safeguarded for employment purposes and four other locations for new employment development. Four mixed use locations are also identified for mixed use development, two of which could provide E(g)/B-Class uses. SPD policy also provides further details on the Golden Valley (A7 West Cheltenham). The 45 ha employment land allocation here will comprise Cyber Central UK, a mixed-use campus of business, enterprise, R&D and education activities within the cyber-tech sector. It could provide up to 186,000 sqm (2 million sqft) of space, supporting some 7,500 jobs. It will also provide a cyber-tech Innovation Centre and a mix of sites and locations which will provide opportunities for inward investment, which may form part of the cyber-tech supply chain. The 2007 Employment Land Review also reviewed 84 developed and undeveloped employment sites, totalling 174 ha. Most were found to be of good or very good quality
- **Gloucester –** The Gloucester City Plan 2011-2031 (2023) identifies four mixed use locations, totaling 8.1 ha which could provide E(g)/B-Class employment while policy for the intensification and improvement of existing employment areas is also set out. The 2019 Employment Land Review also reviewed 76 existing employment locations. It noted that the higher quality business parks and industrial estates are in the north and south of the city, in locations such as Barnwood and Quedgeley, closest to the main trunk road network and M5 motorway
- **Tewkesbury –** The Tewkesbury Borough Plan 2011 – 2031(2022) identifies 10 'Major Employment Sites' (developed business parks/industrial estates) with 11.64 ha of available expansion land. It also identifies 14 locations as 'Rural Business Centres', along with 13.7 ha of additional employment land in these centres. The Tewkesbury Garden Town will ultimately deliver 10,195 homes and some 100 ha of employment land. The most up to date Employment Land Review (2016) reviewed 50 developed employment areas (industrial estates, business parks, etc.). It also reviewed 101 locations with development potential, identifying

maximum employment land supply of 188.4 ha of good/very good in quality land if all site constraints were addressed. If they were not addressed that supply reduces to 29.0 ha.

2.143 These sites are reviewed in Sections 5.0-7.0 identifying where allocated/identified land is still available for development.

Key Sectors

2.144 Studies reference a number of key industrial sectors, relevant to the SLP Area. These are summarised in Table 11 and are analysed further in Section 3.0.

Table 11 – Key Sectors Mentioned in Policy and Evidence Base Studies

Key Employment Sector (Sub-Sectors Referenced)	Studies which Mention the Sector	Comments
Advanced Manufacturing (Advanced Engineering and Aero Space, Semi-Conductors, Healthcare, Hydraulic pumps, Precision Measurement and Disruptive Materials)	National IS-8 Sector Advanced Manufacturing, with a focus on Aero Space, is referenced in multiple studies including Gloucestershire's Local Growth Plan, Gloucestershire's Economic Strategy, Gloucestershire Economic Needs Assessment (2020), Cheltenham Employment Land Review (2007), Tewkesbury Garden Town Evolution of the Concept Plan (2021)	Aero Space linked to at Gloucestershire Airport and a range of established local manufacturers Advanced manufacturing is a priority for surrounding sub-regions
Clean Energy (Energy Transition and Low Carbon Innovation, Renewables, Nuclear, Environmental Technology)	National IS-8 Sector Clean Energy, under a number of different names, is referenced in multiple studies including Gloucestershire's Local Growth Plan, Gloucestershire's Economic Strategy, Gloucestershire Economic Needs Assessment (2020), Cheltenham Plan (2020), Cheltenham Employment Land Review (2007), Tewkesbury Garden Town Evolution of the Concept Plan (2021)	Low carbon energy is also a priority in Worcestershire and in the West of England cites
Creative Industries (Architecture, the Media, Arts and Crafts and the Performing Arts)	National IS-8 Sector Golden Valley Development SPD, Cheltenham Employment Land Review (2007)	
Defence (Will include Secure Technologies and Digital or Cyber-Security/Cyber-Tech, referenced below)	National IS-8 Sector Cyber-Security referenced in multiple studies including Gloucestershire's Local Growth Plan, Gloucestershire's Economic Strategy, Gloucestershire Economic Needs Assessment (2020), Cheltenham Plan (2020), Golden Valley Development SPD, Cheltenham Economic Strategy	Linked to GCHQ in Cheltenham and the associated Golden Valley developments
Digital and Technologies (ICT) (Key local sub-sector will be Secure Technologies and Digital or Cyber-Security, artificial intelligence)	National IS-8 Sector Cyber-Security referenced in multiple studies including Gloucestershire's Local Growth Plan, Gloucestershire's Economic Strategy, Gloucestershire Economic Needs Assessment (2020), Golden Valley Development SPD, Cheltenham Employment Land Review (2007), Cheltenham Economic Strategy, Tewkesbury Garden Town Evolution of the Concept Plan (2021)	Linked to GCHQ in Cheltenham and the associated Golden Valley developments Cyber security is also a priority sector for Swindon and Wiltshire and Worcestershire
Financial Services (Insurance)	National IS-8 Sector Cheltenham Employment Land Review (2007)	-
Life Sciences (Biotechnology)	National IS-8 Sector Cheltenham Employment Land Review (2007)	-
Professional and Business Services	National IS-8 Sector Cheltenham Economic Strategy	-

Key Employment Sector (Sub-Sectors Referenced)	Studies which Mention the Sector	Comments
Agri-Tech	Referenced in multiple studies including Gloucestershire's Local Growth Plan, Gloucestershire's Economic Strategy, Gloucestershire Economic Needs Assessment (2020), Tewkesbury Garden Town Evolution of the Concept Plan (2021)	Building on Gloucestershire's agricultural universities Agri-Tech is also a priority for Worcestershire

Source: Various

3.0 SOCIO-ECONOMIC PROFILE

Introduction

3.1 This section provides a summary profile of the socio and economic conditions of the SLP Area. However, it is noted that the HENA includes a detailed analysis of socio-economic conditions across Gloucestershire, in most cases broken down to the local authority level. It is not the intention of this Study to repeat work already recently completed and accordingly topics already covered in the HENA are just summarised here for Cheltenham, Gloucester and Tewkesbury. Instead the focus of new research is on the sub-region's key growth sectors, highlighted from policy in Section 2.0, their strength and growth potential.

Demographic Assessment

3.2 The latest, 2024, mid-year population estimates indicated that the SLP Area has a combined population of 362,286 (see Table 12). This was 54.1 percent of the Gloucestershire total of 669,400. That SLP Area population increased by 10.4 percent on 2015, similar to the county growth rate of 9.5 percent. As Table 12 shows, Tewkesbury saw by far the strongest growth at 20.2 percent, driven by high housing delivery. This compares to a modest 4.0 percent increase in Cheltenham over the same period.

Table 12 – Population Change (2014-24)

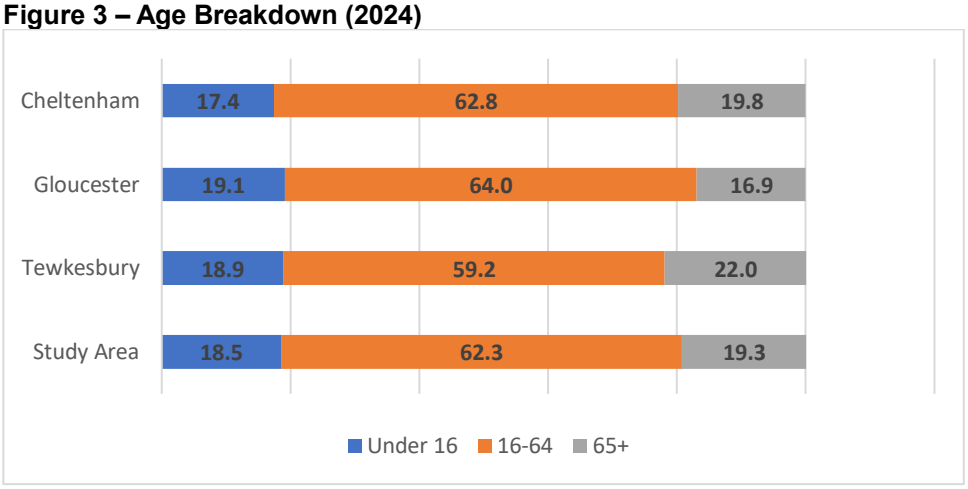
Area	2014	2024	Change 2014-2024	Percentage Change
Cheltenham	117,094	121,739	4,645	4.0
Gloucester	126,167	138,598	12,431	9.9
Tewkesbury	84,826	101,949	17,123	20.2
SLP Area Total	**328,087**	**362,286**	**34,199**	**10.4**

Source: ONS, 2024

3.3 By age range, Gloucestershire's 2024 population profile was somewhat older than national averages with 22.1 percent being 65 plus against 18.7 percent across England. 17.5 percent were under 16 against 18.4 percent across England. Within the SLP Area, as is shown in Figure 3. Gloucester had the youngest age profile with 19.1 percent of the population under 16 and only 16.9 percent aged 65 plus. This reflects the fact that Gloucester, and to a lesser degree Cheltenham is home to a range of further and higher education institutions. Tewkesbury had the oldest profile in the SLP Area, with 22.0 percent its population aged 65 plus. Generally, rural parts of the county have older

populations compared to urban locations.

Figure 3 – Age Breakdown (2024)



Source: ONS, 2024

3.4 Tables 13 to 15 shows how the age structure of the three SLP Area authorities have changed in the 10 years from 2014 to 2024. In the case of Cheltenham and Gloucester, by far the biggest percentage growth was in the 65 plus cohort, indicating an ageing population. Cheltenham in particular saw a negligible gain in its working age 16-64 population. Interestingly, Tewkesbury saw much more diverse changes in its population including a gain of over a quarter in its under 16 cohort and a reasonable gain of 17.9 percent in working age residents.

Table 13 – Population age structure (people) (2014 and 2024) – Cheltenham

	2014	2024	Change	Percentage Change
Under 16	20,085	21,139	1,054	5.2
16-64	76,050	76,476	426	0.6
65+	20,959	24,124	3,165	15.1
Total	**117,094**	**121,739**	**4,645**	**4.0**

Source: ONS, 2024

Table 14 – Population age structure (people) (2014 and 2024) – Gloucester

	2014	2024	Change	Percentage Change
Under 16	25,209	26,459	1,250	5.0
16-64	81,159	88,748	7,589	9.4
65+	19,799	23,391	3,592	18.1
Total	**126,167**	**138,598**	**12,431**	**9.9**

Source: ONS, 2024

Table 15 – Population age structure (people) (2014 and 2024) – Tewkesbury

	2014	2024	Change	Percentage Change
Under 16	15,197	19,262	4,065	26.7
16-64	51,148	60,305	9,157	17.9
65+	18,481	22,382	3,901	21.1
Total	**84,826**	**101,949**	**17,123**	**20.2**

Source: ONS, 2024

3.5 The HENA sets out forecasts of population change to 2046. These inform calculations of housing need the application of the standard method. They also inform the HENA employment land requirements set out in Section 2.0.

3.6 Tables 16 to 18 summarise those forecasts. They show that Tewkesbury is also projected to see the largest proportionate gain in population over 2024-2046, a 22.2 percent increase. Cheltenham will see the largest population growth by numbers at 26,271. Overall the SLP Area will see a gain of 64,892 people by 2046, an increase of 17.9 percent. In all three local authority areas, the most significant level of growth will be in the 65 plus cohort, most significantly in Cheltenham. In comparison all three authorities will see negligible growth, or negative change, in the under 16 cohort.

Table 16 – Projected population change 2024 to 2046 by broad age bands – Cheltenham

	2024	2046	Change in population	Percentage Change
Under 16	21,139	21,006	-133	-0.6
16-64	76,476	92,961	16,485	21.6
65 and over	24,124	34,043	9,919	41.1
Total	**121,739**	**148,010**	**26,271**	**21.6**

Source: Iceni analysis, 2026

Table 17 – Projected population change 2024 to 2046 by broad age bands – Gloucester

	2024	2046	Change in population	Percentage Change
Under 16	26,459	23,594	-2,865	-10.8
16-64	88,748	99,534	10,786	12.2
65 and over	23,391	31,507	8,116	34.7
Total	**138,598**	**154,635**	**16,037**	**11.6**

Source: Iceni analysis, 2026

Table 18 – Projected population change 2024 to 2046 by broad age bands – Tewkesbury

	2024	2046	Change in population	Percentage Change
Under 16	19,262	19,593	331	1.7
16-64	60,305	74,072	13,767	22.8
65 and over	22,382	30,869	8,487	37.9
Total	**101,949**	**124,534**	**22,585**	**22.2**

Source: Iceni analysis, 2026

3.7 Cheltenham and Tewkesbury are projected to see the most growth in working age 16-64 population. In part at least, this will reflect the fact that these two Local Authority Areas are expected to be the focus of strategic scale housing and commercial development in the SLP Area, including the Tewkesbury Garden Town and Golden Valley, which will draw in working age households. This will be an asset for these local authorities, in terms of increasing numbers of local workers, but the dominant trend across the SLP Area is an aging population with impacts on health care and service requirements.

Jobs and Business Change

3.8 This section looks at changes in local employment and business numbers as one measure of the market, and how demand for industrial, warehouse and office premises may be changing. It is a summary of analysis completed in the HENA, with a focus on Cheltenham, Gloucester and Tewkesbury (Section 11, Paragraphs 11.26-11.86 pages 313-333 of the HENA).

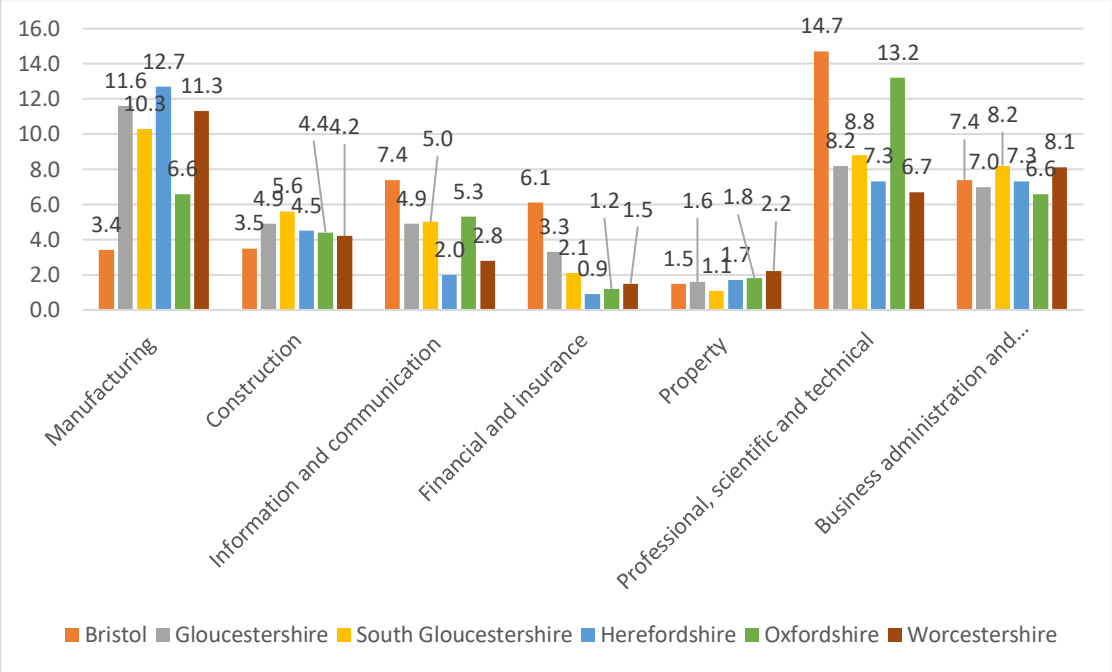
Jobs Change

3.9 The HENA indicates that Gloucestershire has a broad based economy. In terms of jobs it is dominated by manufacturing (35,800 jobs or 11.6 percent of the total), accommodation and food services (29,000 jobs or 9.3 percent), retail (28,000 jobs or 9.3 percent) and professional services (25,400 jobs or 8.2 percent).

3.10 Figure 4 compares the percentages of employment in sectors relevant to this Study in Gloucestershire with employment levels in a range of neighbouring counties and unitary authorities. This shows that the proportion working in manufacturing in Gloucestershire is relatively high at 11.6 percent, only exceeded by the proportion in Herefordshire. It is notably above rates in Bristol and Oxfordshire. By comparison, office based sectors, notably professional services are much more strongly represented in Bristol (an established urban office centre) and Oxfordshire (which will include the research facilities of Oxford). The proportion of employment in office based sectors, and in Construction, in

Gloucestershire is relatively average amongst these comparator areas, arguably with some proportionate strength in finance and insurance.

Figure 4 – Percentage of Employment in Key Sectors in Gloucestershire and Neighbouring Areas



Source: ONS, 2026

3.11 Over the decade 2015-2024, the county saw a decline in employment in traditional industrial sectors, and in several service sectors, but growth in health and education and knowledge-based industries.

3.12 By sector:

- Across the county, there was modest growth in manufacturing (a gain of 1,030 jobs or 3 percent) while transport and storage (logistics) saw a decline of 1,610 jobs or 16 percent.
- Construction saw reasonable growth of 1,000 extra jobs, over this period, while wholesale, which again links to logistics lost 2,000 jobs or an 11 percent reduction.
- Utilities saw 3 percent growth over the decade. Much of this employment is associated with electricity companies and is office based, including with Ecotricity based in Stroud and EDF in Tewkesbury.
- There was strong growth in the knowledge intensive office sectors of information and communication (plus 5,470 jobs or 59 percent growth), real estate (plus 1,000

jobs or 20 percent growth) and professional, scientific and technical services (plus 2,850 jobs or 13 percent growth). The high growth in information and communication was primarily related to gains in computer programming, consultancy and related activities.

- Health and education also saw strong growth, gaining 3,000 and 1,000 jobs respectively.

3.13 Focusing on the SLP Area, the HENA identifies the following:

- Manufacturing – 18,700 people were employed in this sector in 2024, of which 58.0 percent (10,850) were in Tewkesbury and concentrated along the M5 Corridor. Gloucester had 4,170 manufacturing jobs (22.3 percent of the total) and Cheltenham 3,680 (19.7 percent). Of the three authorities, only Tewkesbury saw significant growth in manufacturing employment over 2015-2024, a gain of 1,665 jobs while Cheltenham and Gloucester recorded losses of -290 and -170 respectively, over the same period. Across the county, the dominant manufacturing sub-sectors are machinery and equipment, metal products, electronics and aerospace. Tewkesbury is particularly strong in aerospace manufacturing (3,500 jobs in 2024), hosting several large aerospace as well as the Gloucestershire Airport. Machinery and equipment, metal products and electronics are also local manufacturing strengths in Tewkesbury. Gloucester and Cheltenham have strengths in manufacturing of machinery and equipment and metal products, although Gloucester also has a large number of food production jobs (600)
- Transport and Storage – 4,420 were employed in this sector in 2024, across the SLP Area, almost half (2,150) in Tewkesbury. Another 1,850 (41.9 percent) were employed in this sector in Gloucester while transport and storage has a limited role in Cheltenham, with only 329 (7.2 percent) employed. Again this will be influenced by proximity to the M5. As mentioned, this sector lost employment almost everywhere in Gloucestershire over 2015-2024, but with the largest losses being in Gloucester and Tewkesbury at -350 and -570 respectively
- Construction – Construction employed 8,450 in 2024, and that employment was more evenly spread between Cheltenham (2,075 or 24.6 percent), Gloucester (3,150 or 37.3 percent) and Tewkesbury (3,225 or 38.2 percent). Although construction was a growth sector for the county more generally, much of that growth was focused in Gloucester (and Stroud) which gained 475 jobs.

Cheltenham by comparison recorded a loss of -300 construction jobs and Tewkesbury -50

- Wholesale – Wholesale employed 8,750 in 2024, and again that employment was somewhat evenly spread between Cheltenham (2,500 or 28.6 percent), Gloucester (3,250 or 37.1 percent) and Tewkesbury (3,000 or 34.3 percent). All three authorities recorded employment losses of -250 jobs each, in wholesale
- Office Based Sectors – Sectors which require private office space (professional, scientific and technical; administrative and support services, information and communication; financial and insurance and real estate) employed 50,682 in 2024. This was focused in Cheltenham with 22,782 (45.0 percent), followed by Gloucester with 14,760 (29.1 percent) and then Tewkesbury with 13,140 (25.9 percent). By sector, the main findings are:
    - Professional, Scientific and Technical – The largest sector, by job numbers employing 15,875 in the SLP Area in 2024. The sector is concentrated in Cheltenham (7,725 employed or 48.7 percent), followed by Tewkesbury (5,050 or 31.8 percent). The sector has a surprisingly modest role in Gloucester, employing 3,100 people (19.5 percent) here. Growth between 2015-2024 was mostly concentrated in Cheltenham and Tewkesbury, which both gained around 1,600 jobs, while Gloucester saw a net loss of local employment of -610 jobs
    - Administrative and Support Services – Is primarily found in Cheltenham (6,075 jobs) and Gloucester (5,795 jobs), but Cheltenham lost -2,050 jobs over 2015-2024 while Gloucester gained 1,470[2]
    - Information and Communication – Unsurprisingly ICT is focused in Cheltenham with 5,350 jobs or half the total for the SLP Area. By far the strongest growth was in Cheltenham where 2,375 jobs were added, compared to 755-850 elsewhere
    - Finance and Insurance – Employed 2,000-2,500 in each authority, but has seen losses in each location since 2015

[2] N.B. This change is not linked to the loss/gain of any specific companies, nor is there evidence of companies moving from Cheltenham to Gloucester. As is discussed below, all three Local Authorities have gained businesses in this sector since 2015, mostly micro firms which will have a limited impact on jobs numbers. One national trend which will have influenced on jobs numbers over this period is the consolidation of back office and business functions in companies and their partial replacement by online services. This trend appears to have had a greater impact on Cheltenham than Gloucester.

- Real Estate – Real Estate is focused in Cheltenham with 1,500 employed (43.5 percent), followed by Tewkesbury with 1,250 (36.2 percent) and Gloucester with only 700 (20.3 percent). Tewkesbury has seen the biggest gain since 2015, an increase of 650.

- Public Administration and Defence – This sector employed 9,750 across the SLP Area in 2024, strongly focused in Gloucester which had 6,000 jobs or 61.5 percent of the total against 2,500 (26.6 percent) in Cheltenham and only 1,250 (12.8 percent) in Tewkesbury. Over 2015-2025, Cheltenham lost -3,500 jobs in this sector while Gloucester gained 2,500. This may reflect a reclassification of place of work in the public sector, as well as some movement of staff between County offices, while much of the GCHQ employment of Cheltenham is clearly not classified as 'defence' in this dataset. Tewkesbury saw no change in public administration/defence employment levels
- Health – A key component of the SLP Area's economy, employing 20,500 in 2024, of which over half (11,000) were in Gloucester and another third (7,000) were in Cheltenham, reflecting the presence of major hospital facilities here. Employment in Tewkesbury was modest by comparison at 2,500 (12.4 percent). Gloucester and Cheltenham saw growth of 1,000 jobs each over 2015-2024, Tewkesbury gained 500 jobs
- Education – Education employs 14,000 in the sub-region, focused in Cheltenham (6,000 jobs or 42.9 percent) and Gloucester (5,000 jobs or 35.7 percent) which is unsurprising as this is where further and higher education facilities will be focused. Tewkesbury had 3,000 (21.4 percent) employed in education in 2024. However, Tewkesbury also saw strong proportionate growth in education employment, a gain of 1,000 jobs since 2015. Gloucester gained 500 jobs while Cheltenham saw no change over the decade.

3.14 The overall conclusions on employment, as set out in the HENA are that:

- Cheltenham has a service- and knowledge-led economy, with strong concentrations of employment in professional, scientific and technical services, information and communication, finance and insurance, and administrative functions. Growth since 2015 has been fuelled by high-value knowledge-intensive sectors, with Cheltenham being the primary location for many of these sectors
- Gloucester functions as the county's primary administrative and public service centre, with a large health sector, strong public administration presence, and a

significant retail base serving a wide catchment. However, growth has been more constrained, with relatively weak performance in knowledge-intensive sectors and recent contraction in some business services. This creates risks going forwards of continued reliance on public services and population-serving employment

- Tewkesbury has a strongly industrial economy centred on manufacturing, logistics and related sectors along the M5 corridor, complemented by a growing base of business and professional services. Employment growth has been relatively robust, particularly in manufacturing and knowledge-intensive sectors, noting Tewkesbury is the main location for greenfield growth/ urban extensions near Gloucester and Cheltenham.

Number and Sizes of Businesses

3.15 In 2025, there were 28,935 local businesses (i.e. enterprises) in Gloucestershire, of which 13,375, 46.2 percent, were in the SLP Area. 15,575 or 53.8 percent fell outside of the SLP Area. As

3.16 Table **19** shows, in common with other parts of England, most of Gloucestershire's businesses are micro-sized, employing less than 10 people, while less than 1 percent are large businesses with 250 of more employees. However, Gloucester, Cheltenham or Tewkesbury are the main locations for larger businesses, accommodating 75 (68.2 percent) of the 110 large firms in the county.

Table 19 – Local Businesses by Size Band (2025)

	Micro (0 - 9)	Small (10 - 49)	Medium-sized (50 - 249)	Large (250+)	Total
Gloucester	3,165	410	115	20	3,715
Cheltenham	4,615	495	95	35	5,230
Tewkesbury	3,910	410	85	20	4,430
SLP Area	11,690	1,315	295	75	13,375
Cotswold	5,380	560	85	15	6,045
Forest of Dean	3,425	300	45	5	3,775
Stroud	5,135	525	75	20	5,755
Non SLP Area	13,940	1385	205	40	15,575
Gloucestershire	**25,625**	**2,695**	**510**	**110**	**28,935**

Source: ONS Business Counts, 2025

3.17 As Table 20 shows, the SLP Area gained 1,130 businesses over the decade 2015-2025 (the same period over which jobs data is available) growth of 9.2 percent, compared to

5.1 percent for the county as a whole and 6.6 percent across the South West. 85.0 percent of the new businesses were micro firms and 94.7 percent employed less than 50. Tewkesbury saw the biggest gain, growth of 13.2 percent while only Cheltenham (and Stroud) gained new large businesses.

Table 20 – Change in local businesses (2015 - 2025)*

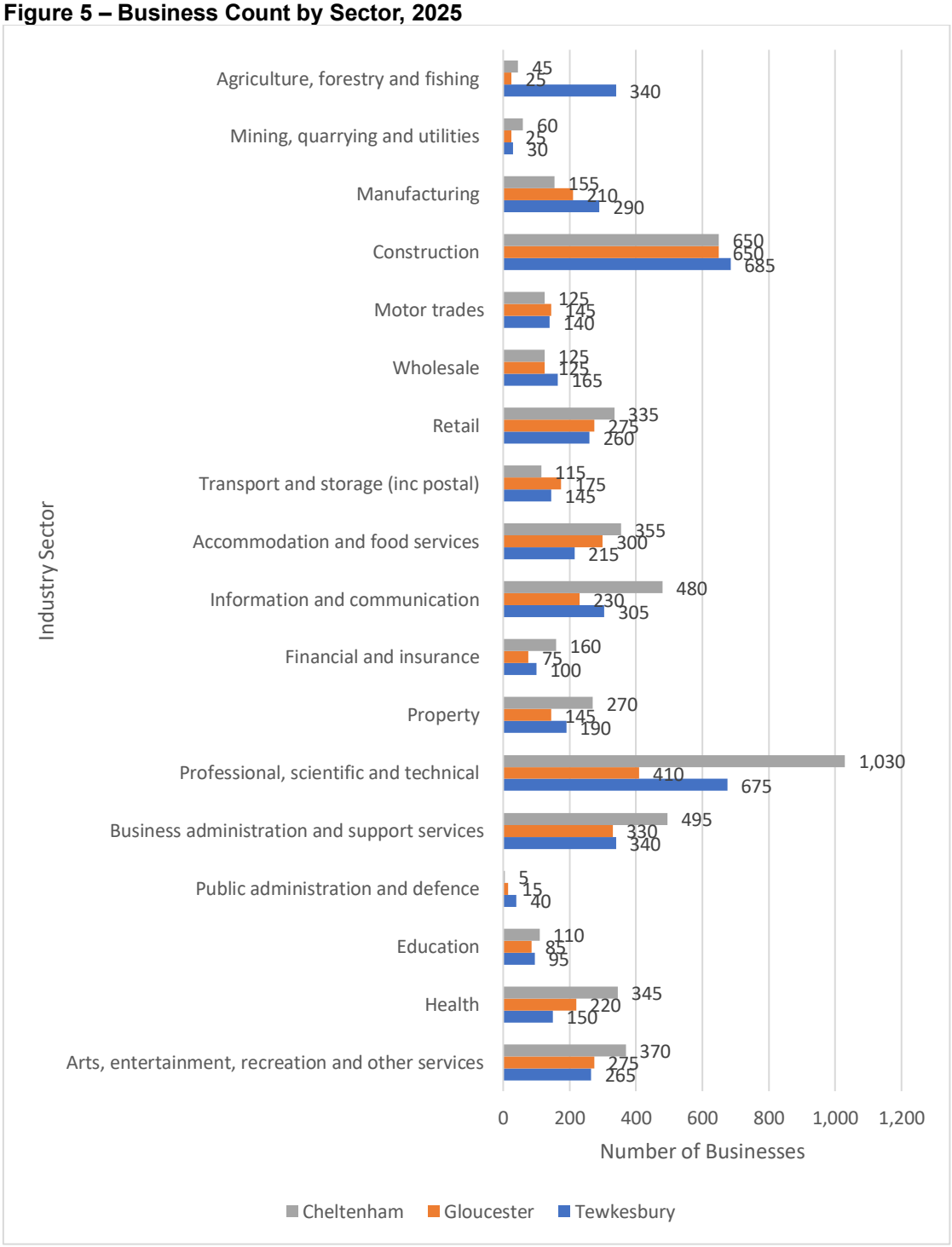
	Micro (0 - 9)	**Small (10 - 49)**	**Medium-sized (50 - 249)**	**Large (250+)**	**Total**
Gloucester	+240	+35	+10	0	+290
Cheltenham	+255	+45	+20	+15	+325
Tewkesbury	+465	+30	+15	0	+515
SLP Area	+960	+110	+45	+15	+1,130
Cotswold	+135	+25	+20	0	+185
Forest of Dean	+85	0	0	0	+85
Stroud	+40	-20	-10	+10	+15
Gloucestershire	**+1,215**	**+105**	**+65**	**+20**	**+1,395**

Source: ONS Business Counts, 2025

* Results for 2015 and 2025 are rounded by ONS, which may cause some inaccuracy in reported change especially where the change is small (i.e. 10 or less).

3.18 The total number of businesses can also be broken down by industry sector, as seen in Figure 5. This exercise was not undertaken in the HENA.

Figure 5 – Business Count by Sector, 2025



Source: ONS, 2025

3.19 The professional, scientific and technical sector has by far the highest number of businesses in Cheltenham at 1,030 or 19.7 percent of the borough total, reflecting the broader dominance of office-based sectors here. 1,030 businesses is nearly half SLP Area total of 2,115 and 22.2 percent of the total for Gloucestershire (4,640).

3.20 In Gloucester and Tewkesbury the largest numbers of businesses are in construction, with 650-685 companies, which as noted previously is a growth sector in Gloucester at least, in terms of jobs. In total there are 1,985 construction industry businesses in the SLP Area, around half the county total (4,000).

3.21 Overall, there were 655 manufacturing firms in the SLP Area, 40.7 percent of all manufacturing firms in Gloucestershire (1,610). Reflecting trends in employment, Tewkesbury has the largest share at 290, followed by Gloucester at 210 and Cheltenham at only 155. With 18,700 employed in the sector across the SLP Area, or an average of 29 workers per firm, this suggests that a high proportion of sub-regional manufacturing employment is contained within small-large firms, as opposed to micro businesses.

3.22 The SLP Area also accommodated 435 transport and storage firms in 2025, a fairly modest proportion, in line with employment numbers, but 54.4 percent of the 800 firms in this sector across Gloucestershire. Here, Gloucester has the largest number at 175, followed by Tewkesbury at 145. This will reflect their position on the M5 Corridor. Tewkesbury also had the largest number of wholesale businesses.

3.23 5,235 businesses in the SLP Area, equating to nearly half of sub-regional firms, were in private office sectors. This represents around half the office based businesses in Gloucestershire (10,710). This business supply is focused in Cheltenham which accommodates 2,435 office based firms, 46.5 percent of the total. Cheltenham dominates in all office sectors, most notably professional, scientific and technical and information and communication, and in most sectors (other than business administration) the number of office-based businesses recorded in Cheltenham is around double the number in Gloucester.

3.24 Gloucester contained 1,190 office-based businesses, with strengths in professional, scientific and technical; business administration and support services; and, to a lesser degree, information and communication. Tewkesbury had 1,610 office-based businesses, with reasonable provision in most sectors, albeit still less than Cheltenham.

3.25 50,682 were employed in office-based sectors across the SLP Area, equating to an average of 10 workers per firm. This suggests that a high proportion of sub-regional office

firms are micro or small in size.

3.26 The industries in the SLP Area with the least number of businesses were the mining, quarrying and utilities sector and the public administration and defence sector. Utilities, do have a modest role in Cheltenham, however, thanks to the presence of companies such as EDF. Unsurprisingly, agriculture forestry and fishing businesses are mostly located in Tewkesbury, although the data will not account for farms which are not registered businesses.

Business Change by Sector

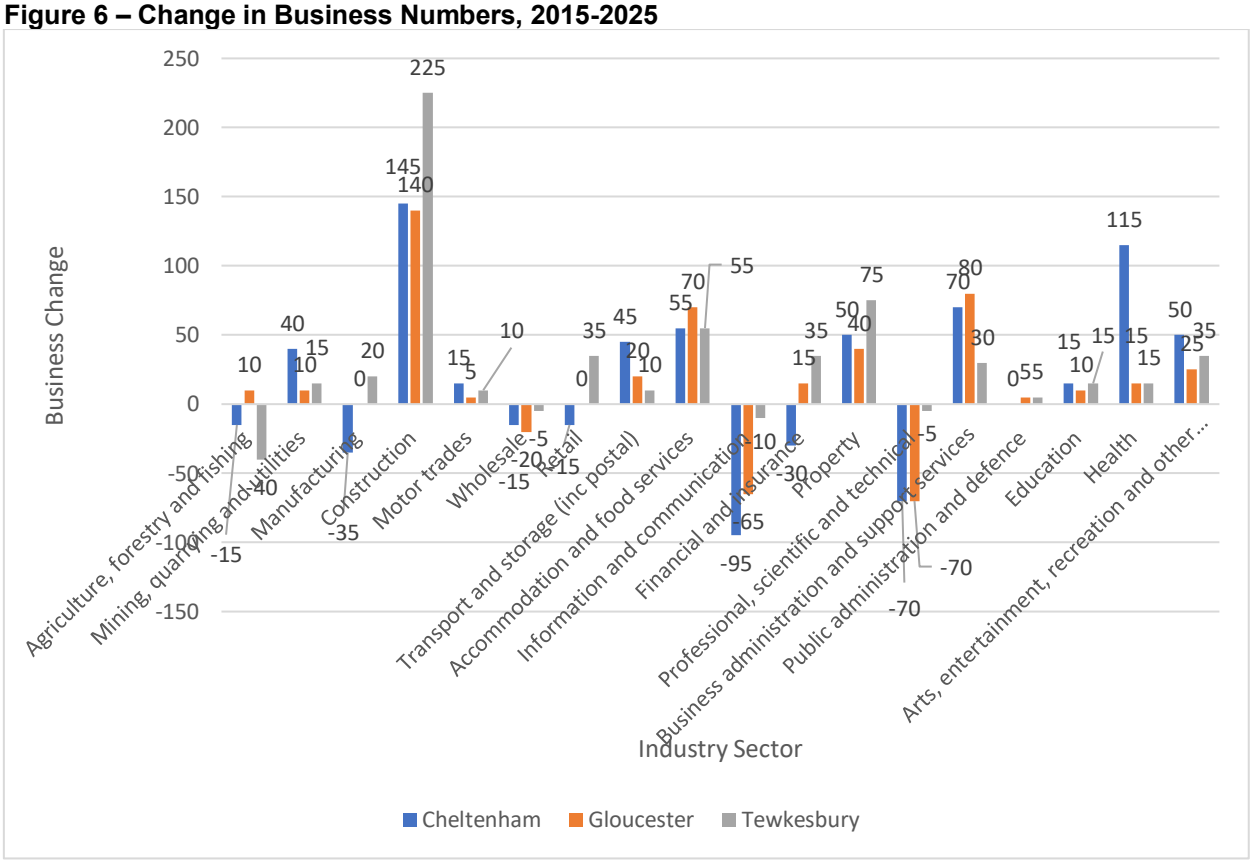
3.27 Figure 6 illustrates how the total number of businesses within each sector has fluctuated between 2015-2025.

3.28 Construction saw the strongest growth in the decade, gaining 510 jobs across the SLP Area, with Tewkesbury seeking the best gain of 225 businesses, but all three local authority areas seeing uplifts. This is despite the more mixed picture in jobs growth noted previously, suggesting that a lot of the gains were in micro firms that had a limited impact on employment numbers.

3.29 Professional, scientific and technical and information and communication recorded declines in business numbers, in all three authorities (as did wholesale). This is in opposition to the growth in employment recorded over the same period, suggesting that any jobs increases are coming from the expansion of existing firms rather than new business start-up or investment into the sub-region.

3.30 The position in the manufacturing sector was mixed, with declines in business numbers in Cheltenham, reflecting employment reductions there, no change in business numbers in Glocester and a modest increase, of 20 firms, in Tewkesbury.

Figure 6 – Change in Business Numbers, 2015-2025



Source: ONS UK Business Counts, 2025

3.31 Comparing change in jobs and business numbers allows the following key trends to be identified:

- Manufacturing remains a key part of the economy, particularly in Tewkesbury where it has seen recent growth in jobs and business numbers
- Transport and storage has a strong role in the economies of Gloucester and Tewkesbury, but a more limited role in Cheltenham. The sector lost jobs across the SLP Area but gained 75 businesses over the decade. One explanation for this is the increasing automation of logistics operations which reduces the numbers employed in a modern warehouse
- Conversely wholesale has seen reductions in both employment and business numbers
- Despite some modest, recorded jobs losses, most notably in Cheltenham, Construction is a key sector across the SLP Area in terms of number of businesses and employment levels. Across the three authorities the sector gained 510 companies over 2015-2025, with growth focused in Tewkesbury. In all three Local Authority Areas business growth was highest in the “Construction

of residential and non-residential buildings", likely driven by increases in housebuilding across the SLP Area. Numbers of domestic plumbing and electrical installation businesses also increased

- The office economy of the SLP Area is extensive, employing 50,682 and accounting for nearly half of all businesses. It is largest in Cheltenham, but remains important in all three local authority areas, despite some sectoral losses in employment and business numbers. Professional, scientific and technical; business administration and support services; and, particularly in Cheltenham, information and communication are key sectors. Business administration and support services saw some loss of jobs, focused in Cheltenham, but gained companies, all micro firms of 0-9 employees which will have minimal impact employment numbers
- Finance and insurance is the smallest office sector and has seen recent losses of jobs and, in Cheltenham, businesses. In part this will reflect the closure of local retail banks as more financial services move online.

Homeworking and Earnings

3.32 The 2021 Census considered the numbers working mostly from home at that time. It must be noted that the Census occurred during the Covid-19 Pandemic, when many workplaces were still closed, and some were forced to work from home when they may now not do so. The figures should thus be treated as indicative of wider trends rather than definitive. Table 21 shows that Cheltenham, and to a lesser degree Tewkesbury, had high rates of homeworking compared to county, regional and English norms. By comparison homeworking in Gloucester, at 24.2 percent, was notably below all wider averages. This is not unexpected as homeworking, outside of periods of Lockdown, is most prevalent in rural locations and least common in cities where people live closer to employment floorspace.

Table 21 – Work Mainly from Home, 2021

Cheltenham, Number (Percent)	Gloucester, Number (Percent)	Tewkesbury, Number (Percent)	County, Percent	South West, Percent	England, Percent
21,711 (36.7)	15,908 (24.2)	15,532 (33.4)	32.5	30.4	31.6

Source: ONS, 2021

3.33 The HENA reviewed earnings, by place of residence and place of work, in 2025. It was noted that:

- "The [Gross] wages of residents of Gloucestershire (median of £773/week) are

slightly higher than those of the South West (median of £734/week), and similar to those of England as a whole (median of £770/week)."

- Wages for workers in Gloucestershire, at a median of £737/week, are slightly above the South West average of £729/week but somewhat below the median for England as a whole of £771/week (which is influenced by high paying jobs in major cities like London). "The discrepancy between earnings of local residents and workers is likely to reflect some degree of outward commuting for highly paid jobs to places like Bristol"
- In the SLP Area, median resident earnings are highest in Cheltenham at £818/week, notably above wider averages. Gloucester has the lowest resident earnings in the county at £694/week. In Tewkesbury the average is £785/week, closer to wider averages, especially for the county as a whole
- In Cheltenham and Gloucester, median earnings of those working locally are close to those of residents at £810/week and £681/week. Tewkesbury presents a contrasting profile, with high workplace earnings (£811/week), exceeding resident earnings (£785/week), reflecting the presence of highly paid jobs within the authority.

Business and Jobs Growth in High Value Sectors

3.34 A review of national, sub-regional and local policy documents, in Section 2.0 identified nine key sectors for the SLP Area:

- Advanced Manufacturing
- Clean Energy
- Creative Industries
- Defence
- Digital and Technologies
- Financial Services
- Life Sciences
- Professional and Business Services
- Agri-Tech.

3.35 These are the eight sectors (the IS-8), of the UK Government's new Modern Industrial Strategy (2025), plus Agri-Tech to reflect the importance of agricultural industries in Gloucestershire.

3.36 It is possible to review the strength of these sectors locally, in terms of numbers of businesses and numbers employed. To do this requires accepting agreed definitions of what industries are contained within each sector. In this exercise, data was assembled reflecting its component SIC Codes as defined at Industrial Strategy Sector Definitions List - GOV.UK and as shown in Table 22. This has some imitations as the national definitions will not reflect local trends. For example, nationally the defence industry is defined around the manufacturing of vehicles and ammunition, while in the SLP Area it is focused on cyber security which will fall into digital and technologies. Computer programming more generally also falls into both digital and technologies and creative industries, which will lead to some duplication (although it is included as a more specialised four digit SIC Code in creative industries, which will not take in all computer programming companies, when compared to digital and technologies). The numbers given here may also differ from those provided in previous sectoral breakdowns of local employment, above. So, business and employment numbers here should be treated as indicative rather than definitive.

Table 22 – Key Sectors and Related SIC Codes (Sectors as Defined in the Industrial Strategy)

Key Employment Sector	Constituent SIC Codes
Advanced Manufacturing	• 20 Manufacture of chemicals and chemical products • 26 Manufacture of computer, electronic and optical products • 27 Manufacture of electrical equipment • 28 Manufacture of machinery and equipment not elsewhere classified • 29 Manufacture of motor vehicles, trailers and semi-trailers • 30 Manufacture of other transport equipment: ○ 303 Manufacture of air and spacecraft and related machinery ○ 3316 Repair and maintenance of aircraft and spacecraft
Clean Energy	The activity takes place in many SIC codes across manufacturing, construction, and services. It is therefore not possible to easily measure in terms of jobs and businesses
Creative Industries (Architecture, the Media, Arts and Crafts and the Performing Art	• 3212 Manufacture of jewellery and related articles • 58 Publishing activities • 59 Motion picture, video and television programme production; sound recording and music publishing activities • 60 Programming and broadcasting activities • 6201 Computer programming activities • 6202 Computer consultancy activities • 7021 Public relations and communication activities • 7111 Architectural activities • 731 Advertising • 741 Specialised design activities • 742 Photographic activities • 743 Translation and interpretation activities

Key Employment Sector	Constituent SIC Codes
	• 8552 Cultural education • 90 Creative, arts, and entertainment activities • 9101 Library and archive activities • 9102 Museum activities
Defence	• 254 Manufacture of weapons and ammunition • 304 Manufacture of military fighting vehicles
Digital and Technologies (ICT)	• 261 Manufacture of electronic components and boards • 262 Manufacture of computers and peripheral equipment • 263 Manufacture of communication equipment • 264 Manufacture of consumer electronics • 26511 Manufacture of electronic instruments and appliances for measuring, testing, and navigation, except industrial process control equipment • 26512 Manufacture of electronic industrial process control equipment • 26513 Manufacture of non-electronic instruments and appliances for measuring, testing, and navigation, except industrial process control equipment • 26701 Manufacture of optical precision instruments • 268 Manufacture of magnetic and optical media • 2731 Manufacture of fibre optic cables • 2732 Manufacture of other electronic and electric wires and cables • 279 Manufacture of other electrical equipment • 465 Wholesale of information and communication equipment • 58 Publishing activities • 59 Motion picture, video, and television programme production; sound recording; music publishing activities • 60 Programming and broadcasting activities • 61 Telecommunications • 62 Computer programming, consultancy, and related activities • 63 Information service activities • 7112 Engineering activities and related technical consultancy • 712 Technical testing and analysis • 721 Research and experimental development on natural sciences and engineering • 951 Repair of computers and communication equipment
Financial Services (Insurance)	• 64 Financial service activities, except insurance and pension funding • 65 Insurance, reinsurance, and pension funding, except compulsory social security • 66 Activities auxiliary to financial services and insurance activities
Life Sciences (Biotechnology)	• 21 Manufacture of basic pharmaceutical products and pharmaceutical preparations • 266 Manufacture of irradiation, electromedical, and electrotherapeutic equipment • 325 Manufacture of medical and dental instruments and supplies • 7211 Research and experimental development on biotechnology
Professional and Business Services	• 69 Legal and accounting activities • 70 Activities of head offices; management consultancy activities • 71 Architectural and engineering activities; technical testing and analysis • 72 Scientific research and development • 73 Advertising and market research • 74 Other professional, scientific, and technical activities • 77 Rental and leasing activities • 78 Employment activities • 82 Office administrative, office support, and other business support activities
Agri-Tech	• 283 Manufacture of agricultural and forestry machinery

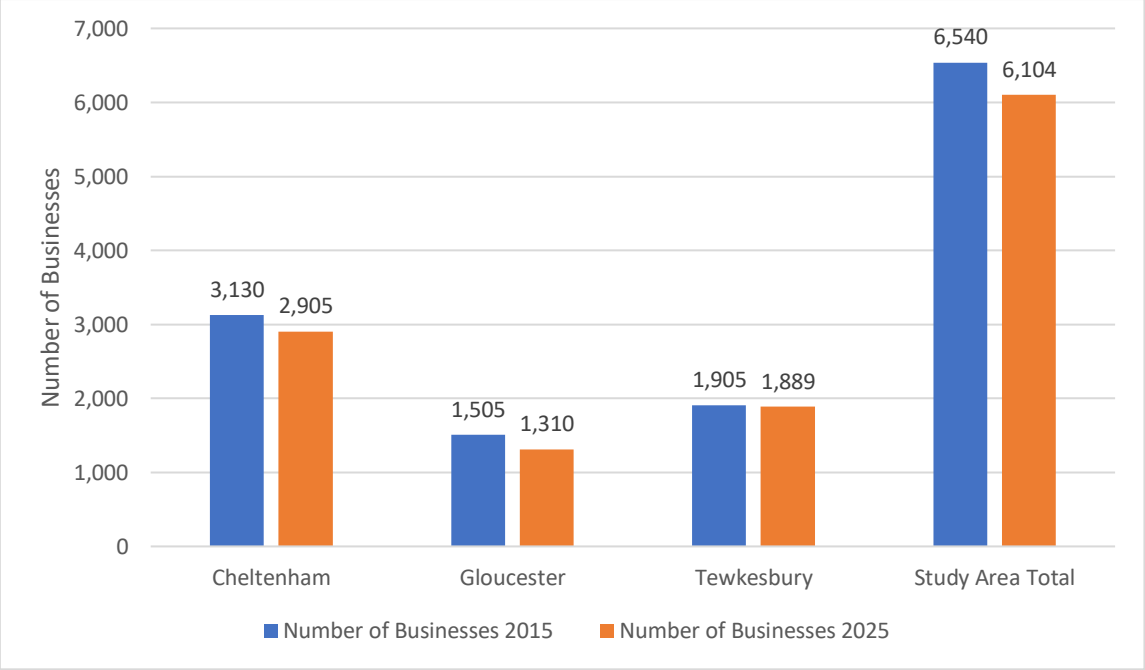
Source: Department for Business and Trade, 2025

3.37 As Figure 7 **– Total Number of Businesses in Key Sectors**shows, as of 2025 there were 6,104 businesses in the Key Sectors in the SLP Area, 45.6 percent of the total number of firms (13,375). This was slightly reduced, by 436 or 7.1 percent on 2015. Of the 2025, firms 2,905, or nearly half were in Cheltenham; 1,889 (30.9 percent) were in Tewkesbury

and 1,310 (21.5 percent) were in Gloucester. All three local authority areas saw some reduction in business numbers over 2015-2025, but in the case of Tewkesbury it was a negligible change of -6 firms while Cheltenham saw a reduction of 225 firms (7.7 percent) and Gloucester saw a reduction of 195 firms (14.9 percent).

3.38 Table 23 below, provides a breakdown of the Key Sector businesses, by sector and local authority area, in 2015 and 2025. Overall, there were 125 advanced manufacturing businesses in the SLP Area in 2025, around half of which were in Tewkesbury. The number reduced by 15 over 2015-2025 to 110, a 12.0 percent reduction. Within advanced manufacturing the SLP Area has strengths in the manufacture of computer/electrical products (30 identified businesses in 2025, mostly in Cheltenham and Tewkesbury) and other machinery (45 businesses, in Tewkesbury). Ten companies were specifically involved in aircraft production although this does not identify other companies in the broader aerospace supply chain.

Figure 7 – Total Number of Businesses in Key Sectors



Source: ONS, 2025

3.39 As is highlighted in Table 23 below, clean energy industries will extend across too many manufacturing, construction, and service sectors to easily quantify in terms of business and job numbers. Creative industries comprised 1,330 businesses in 2025, around half of which were in Cheltenham. A reduction of 50 firms was recorded since 2015, mostly in Gloucester while Tewkesbury gained 20 businesses. A key local strength in creative industries is computer programming activities and related consultancy which accounted for 655 firms in 2025, 295 (45.0 percent) in Cheltenham). This has notably reduced on the 805 firms recorded in this sub-sector in 2015. Cheltenham also has a specific strength in 'Motion picture, video and television programme production activities' with 35 businesses in 2025.

3.40 No businesses were identified in defence although, as mentioned the IS-8 definition excludes cyber security.

Table 23 – Number of Businesses by Individual Key Sectors

Sector	Number of Businesses 2015	Number of Businesses 2025	Total Change	Proportionate Change	Comments
Advanced Manufacturing	• Cheltenham: 35 • Gloucester: 35 • Tewkesbury: 70 **Total: 140**	• Cheltenham: 35 • Gloucester: 25 • Tewkesbury: 65 **Total: 125**	• Cheltenham: 0 • Gloucester: -10 • Tewkesbury: -5 **Total: -15**	• Cheltenham: 0.0 • Gloucester: -28.6 • Tewkesbury: -7.1 **Total: -10.7**	The three authorities have strengths in the manufacture of computer/electrical products and other machinery. Five companies in Cheltenham and five in Tewkesbury are identified as manufacturing transport equipment, with five 'manufacturing air and spacecraft and related machinery'
Clean Energy Industries	Clean energy industries extend across too many manufacturing, construction, and service sectors to easily quantify in terms of business numbers.				
Creative Industries	• Cheltenham: 750 • Gloucester: 300 • Tewkesbury: 375 **Total: 1,380**	• Cheltenham: 690 • Gloucester: 245 • Tewkesbury: 395 **Total: 1,330**	• Cheltenham: -15 • Gloucester: -55 • Tewkesbury: +20 **Total: -50**	• Cheltenham: -2.1 • Gloucester: -18.3 • Tewkesbury: +5.3 **Total: -3.6**	Businesses are focused in computer programming activities and related consultancy. Cheltenham has local strengths in publishing, TV/video production and architectural activities.
Defence	No businesses identified	No businesses identified	-	-	-
Digital and Technologies	• Cheltenham: 740 • Gloucester: 450 • Tewkesbury: 515 **Total: 1,705**	• Cheltenham: 635 • Gloucester: 340 • Tewkesbury: 455 **Total: 1,430**	• Cheltenham: -105 • Gloucester: -110 • Tewkesbury: -60 **Total: -275**	• Cheltenham: -14.2 • Gloucester: -24.4 • Tewkesbury: -11.7 **Total: -16.1**	Again the focus is on computer programming, consultancy and related activities, as well as engineering consultancy.
Financial Services	• Cheltenham: 190 • Gloucester: 60 • Tewkesbury:65 **Total: 315**	• Cheltenham: 160 • Gloucester: 75 • Tewkesbury: 100 **Total: 335**	• Cheltenham: -30 • Gloucester: +15 • Tewkesbury: +35 **Total: +20**	• Cheltenham: -15.8 • Gloucester: +25.0 • Tewkesbury: +53.8 **Total: +6.3**	The main sub-regional strength is in auxiliary financial activities.
Life Sciences	• Cheltenham: 10 • Gloucester: 5 • Tewkesbury:0 **Total: 15**	• Cheltenham: 5 • Gloucester: 10 • Tewkesbury: 5 **Total: 20**	• Cheltenham: -5 • Gloucester: +5 • Tewkesbury: +5 **Total: +5**	• Cheltenham: -50.0 • Gloucester: +100.0 • Tewkesbury: +500.0 **Total: +33.3**	Sub-regional businesses are focused towards the production of pharmaceuticals, medical and dental products.
Professional and Business Services	• Cheltenham: 1,450 • Gloucester: 655 • Tewkesbury:880 **Total: 2,985**	• Cheltenham: 1,380 • Gloucester: 615 • Tewkesbury: 869 **Total: 2,864**	• Cheltenham: -70 • Gloucester: -40 • Tewkesbury: -11 **Total: -121**	• Cheltenham: -4.8 • Gloucester: -6.1 • Tewkesbury: -1.3 **Total: -4.1**	Sub-regional strengths are in head office activities, architecture and engineering. Cheltenham has specific strengths in legal and accounting activities.

Sector	Number of Businesses 2015	Number of Businesses 2025	Total Change	Proportionate Change	Comments
Agri-Tech	No businesses identified	No businesses identified	-	-	

Source: ONS, 2025

3.41 Unsurprisingly, digital and technologies is a strong sector in the SLP Area with 1,430 businesses in 2025, focused in Cheltenham, followed by 455 in Tewkesbury. Unfortunately, a sizable reduction in business numbers was recorded over 2015-2025 of -275 firms or -16.1 percent, focused in Cheltenham and particularly Gloucester. The sub regional strength is in 'Computer programming, consultancy and related activities', more broadly defined than in creative industries and accounting for 785 firms in 2025 – 355 in Cheltenham, 175 in Gloucester and 255 in Tewkesbury. Again, this reduced noticeably, by 215 companies from 1,000 in 2015. Engineering consultancy is another local strength with 375 companies recorded in 2025, focused in Cheltenham and Tewkesbury.

3.42 Financial services accounted for 335 businesses in 2025, focused in Cheltenham. The sector gained 20 businesses between 2015-2025, with key growth in Tewkesbury against a decline of 30 firms in Cheltenham. The main sub-regional strength is in auxiliary financial activities, which accounted for 120 businesses in 2025.

3.43 Life sciences only has a small role in the SLP Area with 20 local businesses, somewhat focused in Gloucester. Those 20 firms are focused towards the production of pharmaceuticals, medical and dental products.

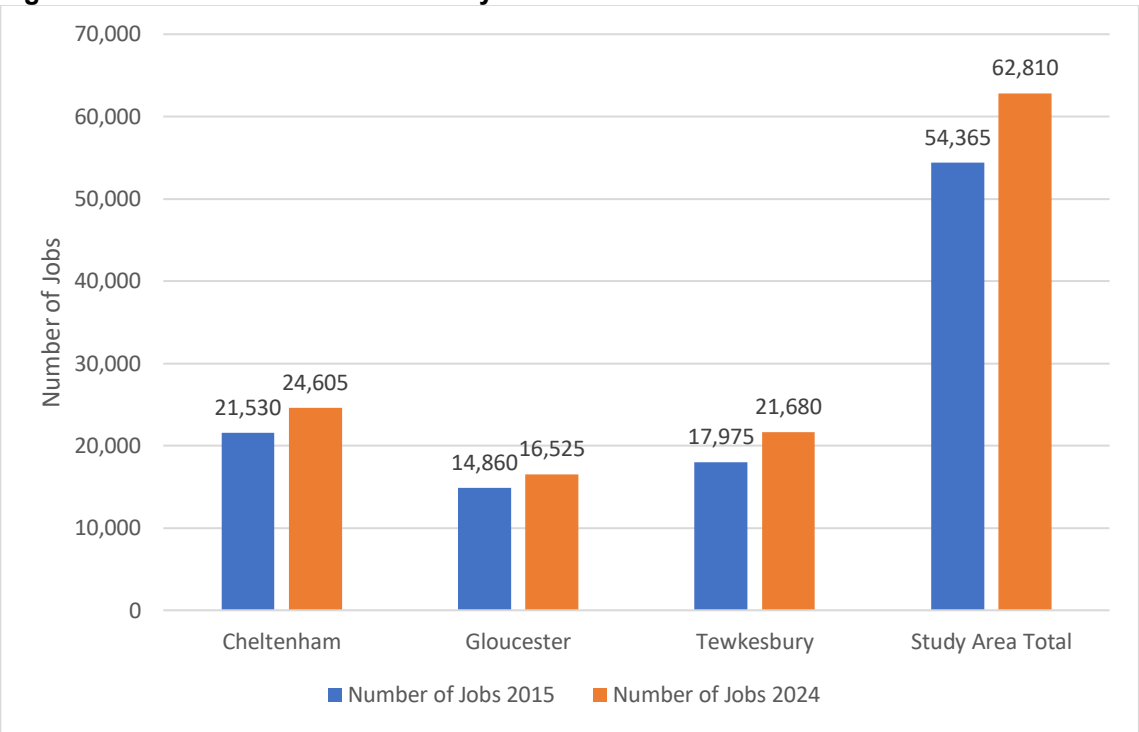
3.44 Professional and business services is the largest Key Sector in terms of business numbers with, under this measure, with 2,864 firms in 2025. Nearly half those firms were in Cheltenham, with another 30.3 percent in Tewkesbury. As with most other sectors there has been a net reduction in business numbers although in this case it is a proportionally modest 4.1 percent reduction, or -121 firms, with the reduction focused in Cheltenham and Gloucester. Sub-regional strengths are in head office activities, architecture and engineering. Collectively, these sectors employed 1,280 in 2025. Cheltenham has specific strengths in legal and accounting activities.

3.45 No agri-tech businesses are recorded, although again the sectoral definition is narrow and will not include supply chain businesses in sectors like wholesale, logistics, manufacturing and services.

3.46 Applying the same sectoral definition to Business Register and Employment Survey (BRES) jobs data (which goes to 2024) indicates that the Key Sectors employed 62,810 in 2024 (see Figure 8). This is around a third of the 184,500 total jobs recorded by BRES.

Again, there will be some duplication of computer programming employment between creative industries and digital and technologies, given sectoral definitions.

Figure 8 – Total Number of Jobs in Key Sectors



Source: BRES, 2025

3.47 Of the 62,810 recorded jobs, 39.2 percent were in Cheltenham, just over a third were in Tewkesbury, and just over a quarter were in Gloucester.

3.48 While the number of businesses has reduced since 2015, employment in Key Sectors has increased, overall, in each authority and across most sectors. This suggests that a lot of recent growth has been in the expansion of existing businesses rather than in the start-up of new firms or incoming companies. Overall, the SLP Area gained 8,445 jobs over 2015-2024, a 15.5 percent growth rate. Tewkesbury saw the largest increase, 3,705 additional jobs or a 20.6 percent increase. Cheltenham gained 3,075 jobs or a 14.3 percent increase and Gloucester gained 1,665 jobs or an 11.2 percent increase.

3.49 Table 24 splits the jobs by sector and local authority area. It shows that the SLP Area had 10,045 jobs in advanced manufacturing in 2024, focused in Tewkesbury. The sector gained 580 jobs overall, but in practice almost all growth was in Tewkesbury while Cheltenham recoded a jobs reduction of -340 over the same period.

Table 24 – Number of Jobs by Individual Key Sectors

Sector	Number Employed 2015	Number Employed 2024	Total Change	Proportionate Change	Comments
Advanced Manufacturing	• Cheltenham: 2,515 • Gloucester: 995 • Tewkesbury: 5,955 **Total: 9,465**	• Cheltenham: 2,175 • Gloucester: 1,030 • Tewkesbury: 6,840 **Total: 10,045**	• Cheltenham: -340 • Gloucester: +35 • Tewkesbury: +885 **Total: +580**	• Cheltenham: -13.5 • Gloucester: +3.5 • Tewkesbury: +14.9 **Total: +6.1**	Employment strengths are in the manufacture of computer/electrical products and other machinery. Tewkesbury has a local strength in the 'manufacture of air and spacecraft and related machinery', which employed 3,500 in 2024.
Clean Energy Industries	Clean energy industries extend across too many manufacturing, construction, and service sectors to easily quantify in terms of job numbers.				
Creative Industries	• Cheltenham: 3,300 • Gloucester: 1,505 • Tewkesbury: 1,280 **Total: 6,085**	• Cheltenham: 5,875 • Gloucester: 2,910 • Tewkesbury: 2,480 **Total: 11,265**	• Cheltenham: +2,575 • Gloucester: +1,405 • Tewkesbury: +1,200 **Total: +5,180**	• Cheltenham: +78.0 • Gloucester: +93.4 • Tewkesbury: +93.8 **Total: +85.1**	Employment strengths are focused in computer programming activities and related consultancy.
Defence	• Cheltenham: 0 • Gloucester: 0 • Tewkesbury: 150 **Total: 150**	• Cheltenham: 0 • Gloucester: 300 • Tewkesbury: 150 **Total: 450**	• Cheltenham: 0 • Gloucester: +300 • Tewkesbury: 0 **Total: +300**	• Cheltenham: 0 • Gloucester: +3,000.0 • Tewkesbury: 0 **Total: +200**	Employment is in the 'manufacture of military fighting vehicles.'
Digital and Technologies	• Cheltenham: 3,965 • Gloucester: 3,140 • Tewkesbury: 3,635 **Total: 10,740**	• Cheltenham: 6,285 • Gloucester: 3,435 • Tewkesbury: 4,620 **Total: 14,340**	• Cheltenham: +2,320 • Gloucester: +295 • Tewkesbury: +985 **Total: +3,600**	• Cheltenham: +58.5 • Gloucester: +9.4 • Tewkesbury: +27.1 **Total: +33.5**	Again the focus is on computer programming, consultancy and related activities, as well as engineering consultancy.
Financial Services	• Cheltenham: 2,075 • Gloucester: 3,325 • Tewkesbury: 2,615 **Total: 8,015**	• Cheltenham: 1,980 • Gloucester: 2,545 • Tewkesbury: 2,320 **Total: 6,845**	• Cheltenham: -95 • Gloucester: -780 • Tewkesbury: -295 **Total: -1,170**	• Cheltenham: -4.6 • Gloucester: -23.5 • Tewkesbury: -11.3 **Total: -14.6**	Employment strengths are focused in auxiliary financial activities, along with basic financial services in Gloucester.
Life Sciences	• Cheltenham: 20 • Gloucester: 605 • Tewkesbury: 5 **Total: 630**	• Cheltenham: 15 • Gloucester: 475 • Tewkesbury: 80 **Total: 570**	• Cheltenham: -5 • Gloucester: -130 • Tewkesbury: +75 **Total: -60**	• Cheltenham: -25.0 • Gloucester: -21.5 • Tewkesbury: +1,500.0 **Total: -9.5**	Sub-regional employment is focused towards the production of pharmaceuticals, medical and dental products with a concentration of employment in Gloucester.

Sector	Number Employed 2015	Number Employed 2024	Total Change	Proportionate Change	Comments
Professional and Business Services	• Cheltenham: 9,655 • Gloucester: 5,290 • Tewkesbury: 4,290 **Total: 19,235**	• Cheltenham: 8,270 • Gloucester: 5,830 • Tewkesbury: 5,140 **Total: 19,240**	• Cheltenham: -1,385 • Gloucester: +540 • Tewkesbury: +850 **Total: +5**	• Cheltenham: -14.3 • Gloucester: +10.2 • Tewkesbury: +19.8 **Total: +0.0**	Employment strengths are focused in head office activities, architecture and engineering. Employment services employ 3,000 in Gloucester and 1,500 in Cheltenham.
Agri-Tech	• Cheltenham: 0 • Gloucester: 0 • Tewkesbury:45 **Total: 45**	• Cheltenham: 5 • Gloucester: 0 • Tewkesbury: 50 **Total: 55**	• Cheltenham: +5 • Gloucester: 0 • Tewkesbury: +5 **Total: +10**	• Cheltenham: +500 • Gloucester: 0.0 • Tewkesbury: +11.1 **Total: +22.2**	The fact that there are some Agri-Tech jobs in the SLP Area, but no businesses, indicates that the businesses that employ them in the sub-region are classified into different sectors overall (i.e. those businesses manufacture more than just agricultural and forestry machinery).

Source: BRES, 2025

3.50 Key local advanced manufacturing sub-sectors include the manufacture of computer/electrical products which employed 1,980, including 1,120 in Tewkesbury. Also 'other machinery', which employed 2,600, 1,500 in Tewkesbury and 800 in Cheltenham. 4,125 were employed in aircraft production, most (3,500) in Tewkesbury.

3.51 Creative industries has seen some of the most significant local growth since 2015, nearly doubling in size to 11,265. As with business numbers, creative industries is a particular strength of Cheltenham which also saw the largest jobs growth, a gain of 2,575 jobs, however, all three areas saw good increases. Computer programming accounted for two thirds of creative industries jobs in 2024, 7,625. Around half of these jobs, 3,750, were in Cheltenham; 27.9 percent (2,125) were in Gloucester and 23.0 percent (1,750) were in Tewkesbury. Employment in the sub-sector has more than doubled from 2015, when it employed 3,225 across the three authorities.

3.52 Despite no businesses being identified for defence, 450 jobs were recorded for the SLP Area in 2024, all in Gloucester and Tewkesbury (see Table 24 above). This likely means the businesses which employ them are registered outside of the SLP Area. Gloucester in particular gained 300 jobs in the period from 2015. Almost all local employment was in the 'manufacture of fighting vehicles.'

3.53 As expected, digital and technologies is a large sector for the SLP Area in terms of employment, as it is for businesses, with 14,340 jobs in 2024. Cheltenham has the largest share of those jobs at 6,285 (43.8 percent), but the Key Sector also employs large numbers in Tewkesbury and Gloucester. The sector saw good growth over 2015-2024, an increase of a third or 3,600 more jobs. Nearly, two thirds of that growth (+2,320 jobs) was in Cheltenham.

3.54 As for businesses, 'Computer programming, consultancy and related activities' is the dominant sub-sector, again employing a broader definition than for creative industries. This sub-sector employed 7,625 in 2024, more than doubling from 2015, when 3,225 were employed. In 2024, around half of that sub-sector employment was in Cheltenham (3,750), 27.9 percent (2,125) was in Gloucester, and 23.0 percent was in Tewkesbury (1,750). Engineering activities and related technical consultancy is another local strength, employing 2,400 in 2024, focused in Tewkesbury and Cheltenham.

3.55 Financial services is the one Key Sector which appears in clear decline, by job numbers, across all three local authority areas though it has gained a modest number of businesses (20 net) since 2015. The sector lost 1,170 jobs over 2015-2024, a 14.6 percent decline, with Gloucester most affected. As mentioned, this is a national trend with companies reducing employment numbers as more financial services become automated and move online. Interestingly, by this measure, the sector saw some increase in business numbers suggesting and data suggests that growth was all in micro firms, employing less than 10 staff, that will have a negligible impact on employment numbers. The sector is most concentrated in Gloucester, where employment is concentrated in 'Financial service activities, except insurance and pension funding.' The business growth, which is focused in Gloucester and Tewkesbury in auxiliary financial services and the activities of holding companies.

3.56 As was the case for businesses, life sciences is a small sector locally in terms of job numbers. It is broadly concentrated in Gloucester, by businesses and employment, with employment focused on the production of pharmaceuticals, medical and dental products.

3.57 Professional and business services is the largest of the Key Sectors, by business and jobs numbers, with a focus on Cheltenham. Cheltenham has seen recent declines in employment, a 14.3 percent decrease along with a reduction in business numbers but the sector remains sizable. Local employment is generally in traditional service sectors such as head office activities, architecture and engineering. Employment services employed 3,000 in Gloucester and 1,500 in Cheltenham, in 2024, but has a smaller role in Tewkesbury with only 800 employed.

3.58 Agri-tech again has a negligible local role, but this will not include supply chain and consultancy businesses who will not exclusively focus on agricultural activities so will be classified under other sectors.

Summary

3.59 The latest, 2024, mid-year population estimates indicated that the SLP Area had a combined population of 362,286 in that year, 54.1 percent of the Gloucestershire total. Over 2015-2024, the SLP Area population increased by 10.4 percent, similar to the county growth rate of 9.5 percent. Within the SLP Area, Gloucester has the youngest age profile with 19.1 percent of the population under 16 and only 16.9 percent aged 65 plus. This

reflects the fact that Gloucester, and to a lesser degree Cheltenham is home to a range of further and higher education institutions. Tewkesbury has the oldest profile in the SLP Area, with 22.0 percent of its population aged 65 plus.

3.60 The HENA sets out forecasts of population change to 2046. These inform calculations of housing need the application of the standard method. They also inform the HENA employment land requirements set out in Section 2.0. Within the SLP Area, Tewkesbury is o projected to see the largest proportionate gain in population over 2024-2046, a 22.2 percent increase. Cheltenham will see the largest population growth by numbers at 26,271. Overall the SLP Area will see a gain of 64,892 people by 2046, an increase of 17.9 percent. In all three local authority areas, the most significant level of growth will be in the 65 plus cohort, most significantly in Cheltenham. In comparison all three authorities will see negligible growth, or negative change, in the under 16 cohort.

3.61 The HENA indicates that Gloucestershire has a broad based economy. In terms of jobs, it is dominated by manufacturing (35,800 jobs), accommodation and food services (29,000 jobs), retail (28,000 jobs), professional services (25,400 jobs), health and education (25,000 jobs each). Over the decade 2015-2024, the county saw a decline in employment in traditional industrial sectors, and in several service sectors, but growth in health and education and knowledge-based industries. Gloucestershire also contained 28,935 businesses, of which 11,690, 40.4 percent, were in the SLP Area. Most business across the county were micro firms.

3.62 In terms of the general employment sectors which will require E(g)/B-Class accommodation, the following trend can be noted in terms of change over 2015-2024/2025:

- Manufacturing remains a key part of the economy, employing 18,700 people in 655 firms, particularly in Tewkesbury (with 10,850 employed in that borough, in 290 firms) where it has seen recent growth in jobs and business numbers.
- Transport and storage has a reasonable role in the economies of Gloucester and Tewkesbury, with 4,000 employed across the two areas in 320 firms, but a more limited role in Cheltenham. The sector lost jobs across the SLP Area but gained 75 businesses over the decade. One explanation for this is the increasing automation of logistics operations which reduces the numbers employed in a modern warehouse.

- Conversely wholesale has seen reductions in both employment and business numbers.
- Despite some modest, recorded jobs losses, most notably in Cheltenham, Construction is a key sector across the SLP Area, employing 8,450 in 1,985 businesses. Across the three authorities the sector gained 510 companies over 2015-2025.
- The office economy of the SLP Area is extensive, employing 50,682 and accounting for nearly half of all businesses. It is largest in Cheltenham (with 22,782 employed in 2,435 companies) but remains important in all three local authority areas, despite some sectoral losses in employment and business numbers. Professional, scientific and technical; business administration and support services; and, particularly in Cheltenham, information and communication are key sectors.
- Finance and insurance is the smallest office sector and has seen recent losses of jobs and, in Cheltenham, businesses. In part this will reflect the closure of local retail banks as more financial services move online.

3.63 The policy analysis in Section 2.0 identified nine Key Sectors for the SLP Area, which comprise the eight sectors identified in the UK Government's 2025 Modern Industrial Strategy (the IS-8), plus Agri-Tech. This Section has analysed the strength of these Key Sectors in terms of jobs and business numbers, and how employment and business numbers have changed since 2015.

3.64 As of 2024/2025, 62,810 jobs in 6,104 businesses were recorded in the SLP Area in the Key Sectors (which include sectors identified in local and sub-regional policy), of which 39.2 percent of jobs and nearly half of businesses were in Cheltenham. The broad trend has been a decline in business numbers, in these sectors, but increase in employment which suggests that existing local firms are growing, but that the SLP Area has not attracted many new businesses recently or seen high rates of business start-up. By sector:

- Advanced Manufacturing employed 10,045 people in 125 businesses in 2024/2025, focused in Tewkesbury. The Key sector saw a modest decline in business numbers since 2015, but conversely some uplift in jobs, in Gloucester and Tewkesbury. Local strengths are in the manufacture of computer/electrical products and other machinery. 4,125 were employed in aircraft production, in ten

businesses, most (3,500) in Tewkesbury.

- Creative industries employed 11,265 in 1,330 businesses in 2024/2024, increasing by 5,180 jobs over 2015-2024, an 85.1 percent increase. It is a strength of Cheltenham with 5,875 employed in 690 companies here. Computer programming accounted for two thirds of creative industries jobs in 2024, 7,625. Around half of those jobs, 3,750, were in Cheltenham.
- Cyber security falls outside of the national definition of defence, so no specific defence businesses were identified and only 450 jobs, all in Gloucester and Tewkesbury.
- Cyber security will instead fall into digital and technologies, which, unsurprisingly is a large sector for the SLP Area, employing 14,340 in 1,430 businesses. The sector saw good employment growth over 2015-2024, an increase of a third or 3,600 more jobs, but some reduction in company numbers, suggesting the growth was in the expansion of existing businesses. Cheltenham has the largest share of this, 6,285 jobs in 635 firms**.** Computer programming, consultancy and related activities' is the dominant sub-sector (with some overlap with creative industries), employing 7,625 in 785 businesses across the SLP Area.
- As was discussed previously, Financial Services has declined in terms of jobs but, by this measure at least, seen some modest uplift in business numbers in Gloucester and Tewkesbury.
- Life Sciences has a limited role in the economy of the SLP Area with 20 businesses, employing 570, and modest growth in business numbers since 2015. Local employment is in the production of pharmaceuticals, medical and dental products with a concentration of employment in Gloucester.
- Professional and Business Services is the largest of the Key Sectors, employing 19,240 in 2,864 businesses. It is concentrated in Cheltenham although Cheltenham has lost 1,385 jobs (-14.3 percent) since 2015 and 70 businesses. Gloucester and Tewkesbury also lost businesses but gained jobs. Local employment is generally in traditional service sectors such as head office activities, architecture and engineering, plus employment services in Gloucester and Cheltenham.
- The national definition of Agri-Tech excludes a lot of secondary and service functions, concentrating on the direct production of farm equipment which has a limited role in the SLP Area, with 55 jobs and no businesses recorded.

4.0 PROPERTY MARKET ASSESSMENT

Introduction

4.1 This Section provides an overview of the office and industrial property markets in SLP Area, based on published data and interviews with commercial agents active in the sub-region, along with other public organisations with market knowledge and experience. It should be noted that a survey of local businesses was undertaken in the HENA and is not repeated in this Study.

Inward Investment

4.2 Officers of Gloucestershire County Council were engaged to discuss the inward investment market into the county and SLP Area. They identified that there is a steady flow of investment into the county from the US and Europe. The key sectors for investment are:

- Cyber – The Office for Investment[3] identifies West Cheltenham/the Golden Valley as a focus for Cyber investment, in competition with London and Manchester.
- Aerospace – There is a cluster around Gloucestershire Airport, but this also extends west through Gloucester and Stroud to Bristol. This is alongside a secondary cluster at Cotswold Airport. Growth Aerospace activities are in battery technology and vertical take-off, with companies using Cotswold Airport as a test bed.
- Renewable Energy – Energy from waste facilities are a growth area.
- Agri-Tech – Reflecting the role of digital technology in farming. Many such companies see the UK as a logical stepping stone through to the larger market of the US.
- Finance/Professional Services – Seeing overall decline in investment here as more services move online.

Key Sectors

4.3 County and local council officers were also contacted to discuss trends in Key Sectors. The following comments were made:

[3] The Office for Investment is a joint unit of HM Treasury, the Department for Business and Trade, and the Prime Minister's Office that helps attract high-value foreign direct investment into the UK.

- Clean Energy – Not a significant presence in the SLP Area. But will feature within Advanced Manufacturing activities generally. There are also tidal facilities on Severn Estuary, which will have some supporting facilities in the sub-region.
- Creative Industries - Limited offer locally.
- Digital and Tech – Includes Cyber linked to defence (GCHQ), also medical tech linked to Gloucester Royal Infirmary.
- Financial Services – In decline in terms of jobs numbers due to increasing automation in the sector. More a feature of Bristol.
- Life Sciences – Just medical.
- Agri-Tech – Relevant to Tewkesbury, building on two agricultural universities in the county. Sector generally needs small industrial units in rural business parks, esp. for start-ups. Also a strong role for cyber within this sector.

Office Market

Overview

4.4 The office market throughout the UK was significantly impacted by the Pandemic and the imposed workplace restrictions, with office-based workers the main sector of the workforce able to continue working from home throughout the Pandemic restriction periods. This led to many businesses reorienting how they operate, with continued home based and hybrid working arrangements post-pandemic. Such changes in workplace practices have impacted upon demand for office space, with businesses reassessing their size needs for a hybrid workforce. However, there is also a desire from businesses to bring workers back into the office as much as possible and office spaces that are attractive to workers and well-connected are more likely to achieve this objective.

4.5 Therefore, the market is seeing growth in demand for smaller floorspaces, with high to very high amenities and fitout, which are well serviced by transport and surrounding facilities. Therefore, city centre and city fringe locations are well-positioned to take advantage of this trend, whereas traditional business park nodes are less so.

4.6 Another overarching trend in the office market is the substantially increasing costs of development, including land, materials, energy and labour costs. This has been a consequence of global supply chain issues and energy cost spikes in recent years. While construction inflation has moderated, with the annual inflation rate for all new work to March 2026 being 0.8 percent (ONS Construction price indices), compared to double-digit annualised rates in 2022 and 2023, construction costs remain a significant

constraint for new development schemes, particularly offices (and are likely to have increased further in recent months at the USA-Iran War impacts on energy costs). Further to this, the increasing expectation of high-quality premises and energy efficient buildings are putting additional pressures on development costs. City centre locations, where higher rents can be charged, are most attractive to developers at present.

4.7 Energy performance certificate (EPC) regulation changes coming into force in 2027 and 2030 will have impacts on the commercial property market, pushing landlords to improve the energy efficiencies of their buildings. In 2027, commercial buildings will need to have a minimum of a C rating to be leased and by 2030 commercial buildings will need a minimum of a B rating. Many older premises do not comply with these ratings and therefore will require significant refurbishments in order to remain available to the market for commercial space.

4.8 In the South West, Bristol has the largest office market and is considered one of the 'Big Nine' regional cities for the service economy, alongside Birmingham and Cardiff. In Quarter One, 2026 Bristol's office take-up reached 24,817 sqm, the strongest quarterly performance since Quarter One 2022 when the market bounced back from the Covid-19 Pandemic. Buoyant levels of demand were seen in both the city centre and out-of-town markets with take-up levels 12 percent and 43 percent above the 10-year quarterly average (Avison Young, 2026).

4.9 The primacy of Bristol and its recent growth were reflected in the prime rent levels now being achieved. The prime rent of the city in Quarter One 2026 was £52/sqft (£560/sqm), up 4 percent on Quarter One 2025 (Avison Young, 2026). As will be seen below, this is noticeably above the rates which are being achieved within the SLP Area and a significant price point premium over other parts of the region.

4.10 The latest Valuation Office data (31st March 2026) indicates that there were 2,890 office properties in the SLP Area, 58 percent of the stock for Gloucestershire and 8.2 percent of the stock of the whole South West. These 2,890 properties comprise some 662,000 sqm of floorspace. By local authority area, the stock within the SLP Area comprises:

- Cheltenham – 1,200 properties (41.5 percent of total), comprising 262,000 sqm of floorspace
- Gloucester – 1,080 properties (37.4 percent of total), comprising 263,000 sqm of floorspace

- Tewkesbury – 610 properties (21.1 percent of total), comprising 137,000 sqm of floorspace.

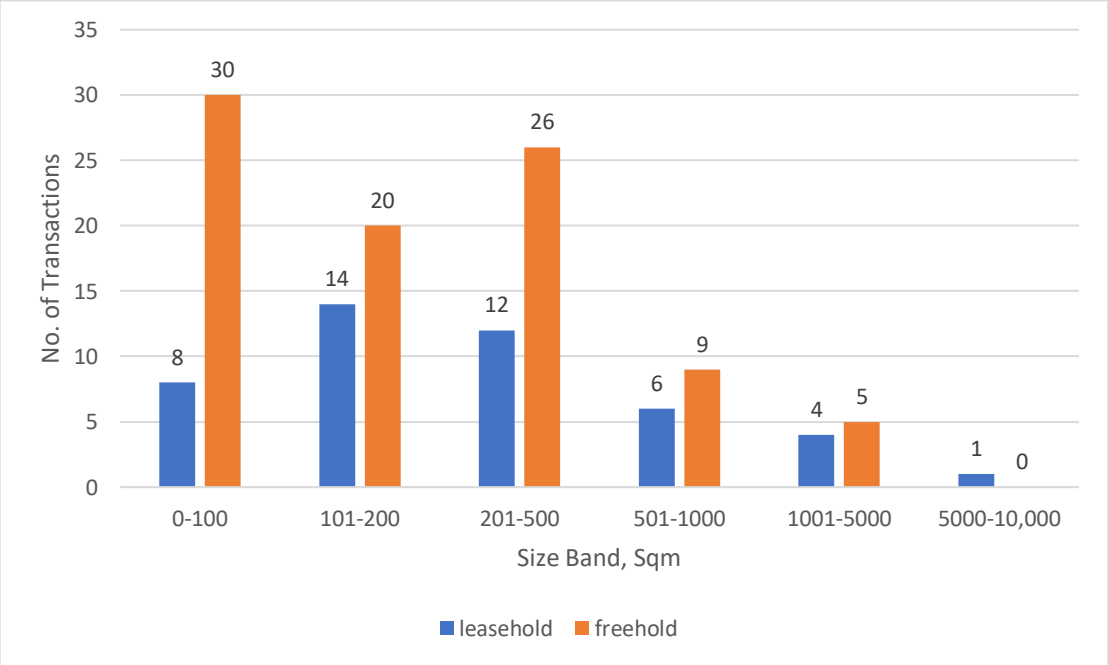
Office Transactions

4.11 Transactional information has been sourced from the Nimbus property comparables database for offices and industrial units, which have been sold or let in the SLP Area since 2016. Transactional data provides evidence of trends, popular locations, along with prime rents which have been achieved in the area.

Cheltenham

4.12 138 office deals have been completed with Cheltenham, comprising 50,494 sqm of floorspace, over the decade. Figure 9 shows the breakdown of the deals by size bands and type.

Figure 9 – Cheltenham Office Market Transactions, 2016-2026, by Sqm Size Band



Source: Nimbus, 2026

4.13 Smaller offices of less than 500 sqm were the most popular with 76 office deals completed altogether, accounting for 80 percent of the decade total. Half of those smaller deals were for sub-100 sqm properties.

4.14 Very large office transactions, for more than 5,000 sqm in one deal, were rare, with only one recorded over the decade. The largest recorded deal of the decade came in 2018

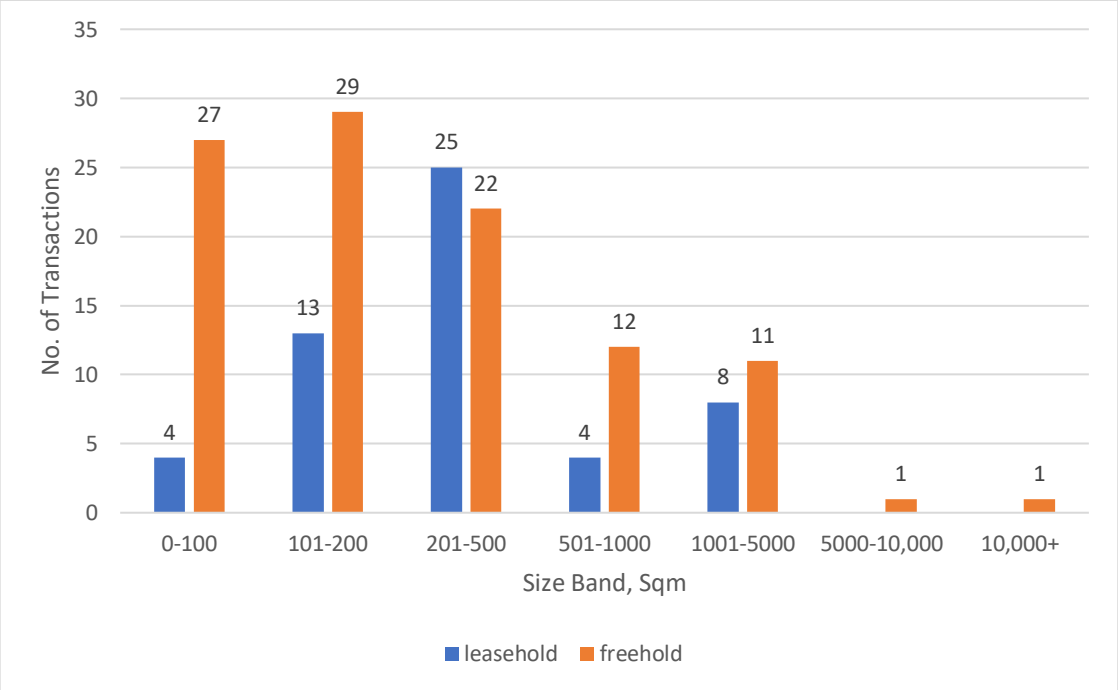
when a 5,847 sqm office property (Rose Hill, New Barn Lane) was leased for a graduate training and a UCAS facility. Office take up equated to around 20 transactions/year over the decade.

4.15 Within most size bands, freehold transactions dominate although this may reflect the nature of the transactions which are recorded by available data. However, it still shows a strong freehold market within the town.

Gloucester

4.16 Since 2016, 157 office deals have been completed within Gloucester, comprising 122,215 sqm of floorspace (See Figure 10).

Figure 10 – Gloucester Office Market Transactions, 2016-2026, by Sqm Size Band



Source: Nimbus, 2026

4.17 The nature of transactions in Gloucester are proportionally similar to those in Cheltenham, albeit with a somewhat stronger focus on the 101-200 sqm size band. Overall, transactions of less than 500 sqm accounted for 78 percent of all deals completed. Again there was a strong freehold market.

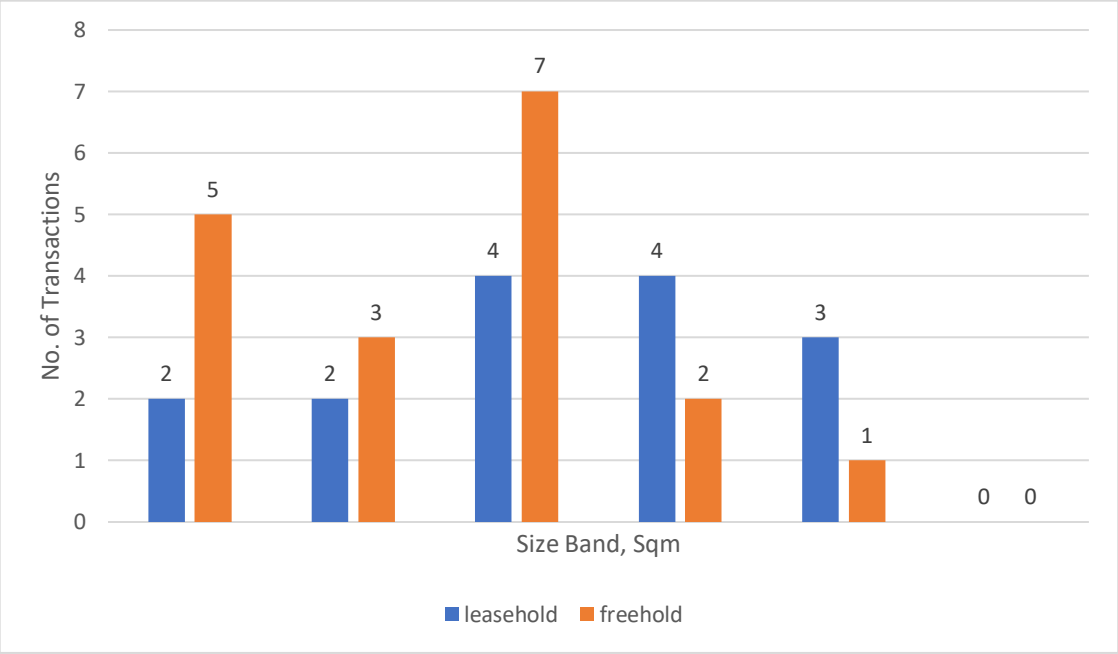
4.18 Very large office transactions, for more than 5,000 sqm in one deal, were rare, with only two recorded over the decade. The largest recorded deal of the decade came in 2018 when the 7,196 sqm Twyver House, Burton Way was purchased for £11.8 million.

4.19 2017 was the most active year of the decade with 22 deals occurring, comprising 56,167 sqm of floorspace, it was also the year with most floorspace transacted.

Tewkesbury

4.20 33 office deals occurred within Tewkesbury over the past decade, comprising 21,430 sqm of floorspace (see Figure 11). This was clearly far less than in Cheltenham or Gloucester.

Figure 11 – Tewkesbury Office Market Transactions, 2016-2026, by Sqm Size Band



Source: Nimbus, 2026

4.21 Again offices of less than 500 sqm were most popular deals over the decade, with the 201-500 sqm having the most transactions. Deals less than 500 sqm accounted for 90 percent of all transactions.

4.22 There were no transactions of over 5000 sqm and the four deals that occurred within the 1,000-5,000 sqm range, were of the letting of council offices within Tewkesbury.

4.23 2023 and 2018 were the most active years for leasehold and freehold sales, both seeing seven transactions, however 2018 had the most floorspace transacted, 2,303 sqm.

Prime Office Rents in the SLP Area

4.24 From past transactions, prime office rents can be identified as:

- Cheltenham – £24-30/sqft (£258-323/sqm), depending on building grade and location. Premium character buildings and refurbished Grade A offices in the town centre and Prominade can expect to achieve the highest rents. The buildings of Jessop Avenue and Eagle Tower are typically the best performing in the town. For flexible or serviced options, pricing averages around £400 to £700 per desk, per month, inclusive of core amenities
- Gloucester – £18-20/sqft (£194-215/sqm) for high grade space in the City Centre or Docks. Serviced, fully equipped spaces in premium locations command from £225 to £400 per workstation per month
- Tewkesbury – Around £18/sqft (£194/sqm) with key locations including Ashchurch and Tewkesbury business parks as well as town centres. Serviced locations can achieve between £495 and £795 per month depending on the unit size.

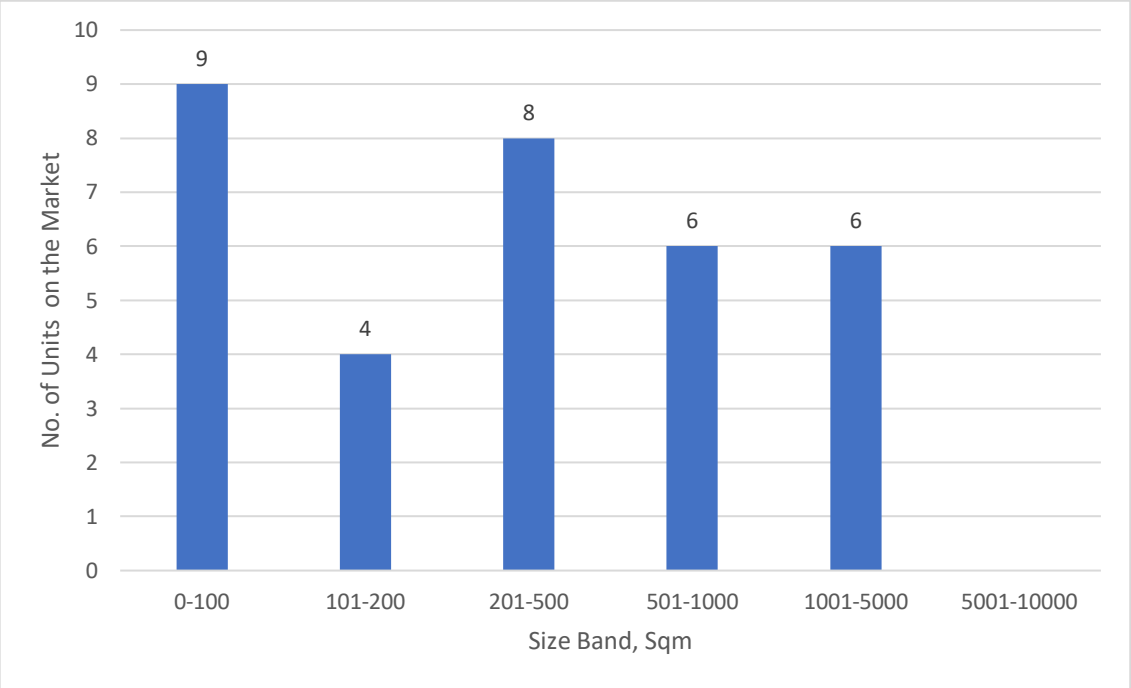
Availabilities and Occupancy

4.25 A schedule of the vacant floorspace being marketed in the SLP Area (as of April 2026) has been compiled mainly from physical survey, a trawl of commercial property agent's 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 There were 82 office premises being marketed within the SLP Area, with a total floorspace of 28,005 sqm. Within this, Cheltenham had 33 vacant office units available, all to let, totalling 16,689 sqm (See Figure 12). Reflecting past transactions supply is focused towards 0-500 sqm properties and particularly 0-100 sqm properties. There was an absence of office properties on market above 5,000 sqm in size, with the largest marketed office suite being in Rosehill, New Barn Lane, 1,829 sqm. The average quoting rent was £28.16/sqft (£303/sqm).

4.27 Within Cheltenham there were serviced offices available in the market, these include Festival House, Harley House and Boutique Workplace company in Jessop House. The latter offers spaces of 2-28 desks or 9-75 sqm.

Figure 12 – Office Units on The Market in Sqm – Cheltenham

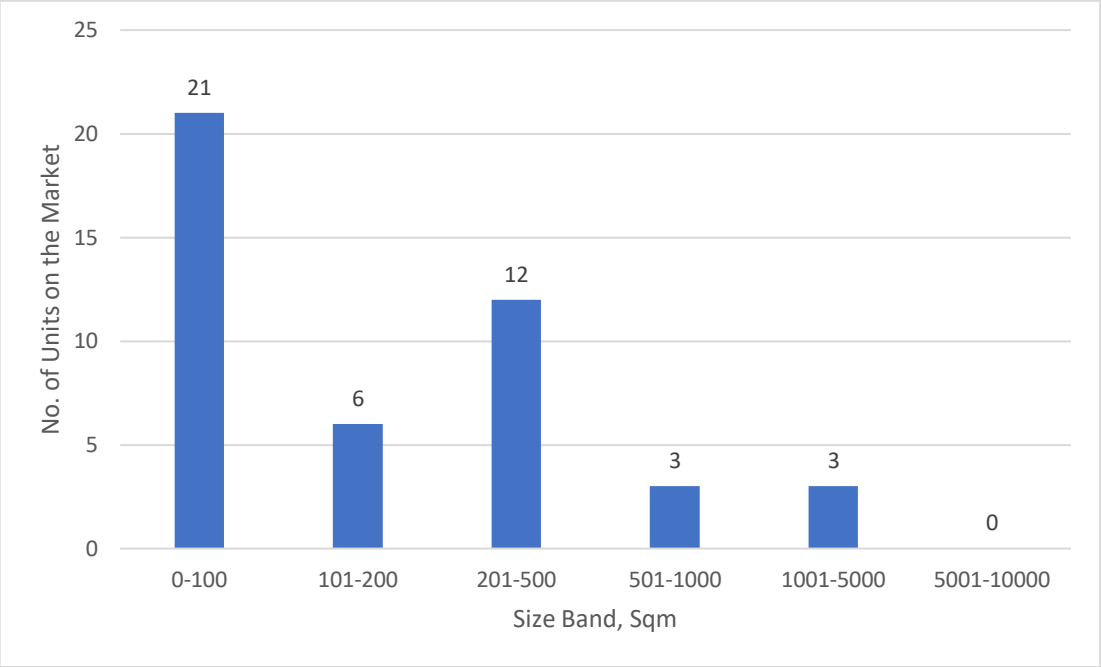


Source: Various, 2026

4.28 Within Gloucester, there were 46 vacant and marketed office premises comprising 11,315 sqm of floorspace (see Figure 13). Again most supply is for sub 500 sqm properties and particularly sub 100 sqm suites and there was absence of available premises of more than 5,000 sqm. The largest available office was Southgate House, Southgate Street, which was 1393 sqm in size. The average quoting rent was £16.35/sqft (£176/sqm).

4.29 Tewkesbury only had three available office premises as of April 2026. This includes the multi-led Oakfield Centre and Canterbury Business Centres, which offer suites of 25-150 sqm.

Figure 13 – Office Units on The Market in Sqm – Gloucester



Source: Various, 2026

4.30 Compared to the total office floorspace figures noted above, office stock in the SLP Area is 97.2 percent occupied by premises numbers and 95.2 percent occupied by floorspace[4]. Split by local authority area, the occupancy rates are:

- Cheltenham – 97.2 percent occupied by premises, 93.6 percent occupied by floorspace
- Gloucester – 95.8 percent occupied by premises, 95.7 percent occupied by floorspace
- Tewkesbury – Availability is mostly serviced space within multi occupancy schemes so difficult to quantify.

4.31 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 higher occupancy rate is an indicator of a full market with businesses having difficulties in finding adequate premises. A lower occupancy rate indicates long-term unoccupied and derelict stock and poor business growth.

[4] N.B. Availability is taken from a differing date to that of the HENA, April 2026 against November 2025 for the HENA, and uses the latest 2026 based VOA data, so vacancy rates will differ here from those shown in the HENA. However, it is noted that the occupancy/vacancy rates shown here are not dissimilar to those in the HENA Study, particularly for industrial/warehouse uses (discussed below).

4.32 By this measure most available occupancy rates, particularly by floorspace are at the upper end of the equilibrium level, at around 95 percent. The main exception is Cheltenham by premises numbers which has a more constrained supply.

Office Agent Comments

4.33 Commercial office agents, and public sector officers, note that Cheltenham is a focus for the office market in the SLP Area. The town has reasonable demand but limited supply, especially outside of the town centre and for higher grade stock. Stakeholders were clear that, development at West Cheltenham (Golden Valley) will make a big difference in the market, although will also displace key businesses from elsewhere in the county and region.

4.34 Outside of Cheltenham, Gloucester Business Park is the main focus for demand, with more limited local markets in Gloucester city and across the rest of Tewkesbury, including at Gloucestershire Airport.

4.35 Suites of 200-500 sqm are most in demand. In terms of rents, prime rates are:

- Gloucester Business Park – Up to £29/sqft (£312/sqm)
- Cheltenham – Up to £32/sqft (£344/sqm)
- Gloucester – Around £25/sqft (£269/sqm)
- Tewkesbury – Around £20/sqft (£215/sqm).

4.36 Demand is for un-serviced leasehold space. There is a particular need for high quality space, which is undersupplied in Cheltenham and largely unavailable in Gloucester.

4.37 In terms of the Digital and Technologies, stakeholders report that companies tend to enter the Gloucestershire market as start-ups, only requiring offices of 1-6 desks in multi-let space. However, they then expand quickly so a lot of grow-on options are needed. The county lacks such grow on options and as a result is losing expanding businesses to locations such as Oxford and the Thames Valley. The need is for high grade office accommodation, which remains affordable. Key examples of this include Clockwise Festival House and Festival House, Jessop Avenue, Cheltenham.

4.38 There is some demand for data centres, however, requirements for these also variable and footloose, so not something which can easily be planned for.

Industrial/Warehouse

Overview

4.39 The industrial/warehousing market throughout the UK performed significantly better than the office market through the pandemic period. While office space was impacted by homeworking and hybrid working, the manufacturing and logistics sectors remained operating throughout the pandemic period. Furthermore, the logistics market saw a significant spike in demand as more retailing was undertaken online. While this trend has moderated, the post-pandemic retail environment includes an increased share of spend online, which has implications for demand for logistics and warehousing units.

4.40 Yields for prime industrial/warehousing schemes have consistently been lower than office schemes in recent years. The increasing demand for logistics space around the time of the pandemic saw yields reduce to 4-4.5 percent, reflecting a very favourable market. They have since moderated to 5.25-5.5 percent, though this remains a strong level. Rising development costs have been less problematic for industrial/warehousing schemes than office schemes, though have still limited development in more marginal areas.

4.41 The South West logistics and industrial market experienced a major resurgence in 2025 with take up, some 2.98 million sqft (277,000 sqm), at 239 percent above 2024 levels. Recent market activity has been driven by Third-Party Logistics (3PL) firms, which accounted for over half of all transactions, alongside major retail brands. The current supply in the region is 2.29 million sqft (213,000 sqm), down 63 percent on 2024 and equating to a vacancy rate of 6.52 percent (Savills, 2025).

4.42 Deal sizes increased dramatically in 2025, with the average strategic transaction now at 297,885 sqft (28,000 sqm). To meet demand, developers have focused heavily on large, speculative properties, particularly 500,000 sqft plus (46,000 sqm plus) units (Savills, 2025).

4.43 The latest Valuation Office data (31st March 2026) indicates that there were 3,100 industrial and warehouse properties in the SLP Area, 40.5 percent of the of the stock for Gloucestershire and 4.9 percent of the stock of the whole South West. These 3,100 properties comprise some 1.975 million sqm of floorspace. By local authority area, the stock with the SLP Area comprises:

- Cheltenham – 780 properties (25.2 percent of total), comprising 365,000 sqm of floorspace

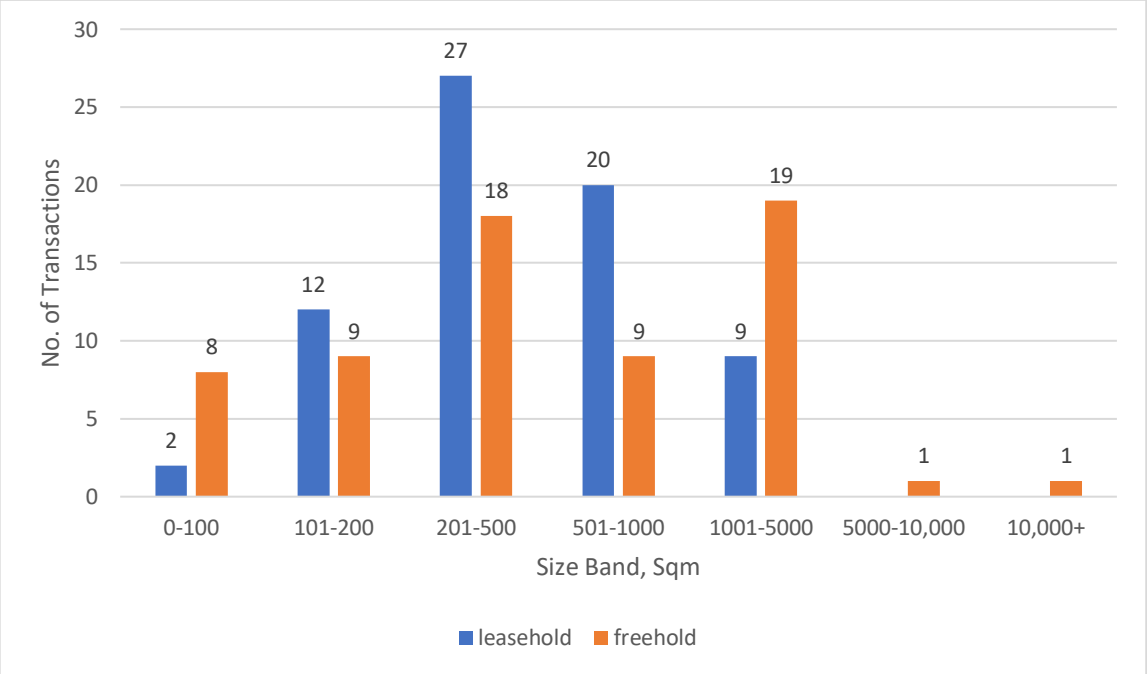
- Gloucester – 1,080 properties (34.8 percent of total), comprising 692,000 sqm of floorspace
- Tewkesbury – 1,240 properties (40.0 percent of total), comprising 918,000 sqm of floorspace.

Industrial Transactions

Cheltenham

4.44 135 industrial transactions have been completed within Cheltenham in the past decade, comprising 43,511 sqm of floorspace (see Figure 14). This equates to an annual average of 4,351 sqm/year, in 13-14 deals/year, being transacted.

Figure 14 – Cheltenham Industrial Market Transactions, 2016-2026, by Sqm Size Band



Source: Nimbus, 2026

4.45 There was reasonable market activity in all size bands up to 5,000 sqm but the most activity occurred in the mid-sized categories between 201 and 5,000 sqm, which accounted for three quarters of deals.

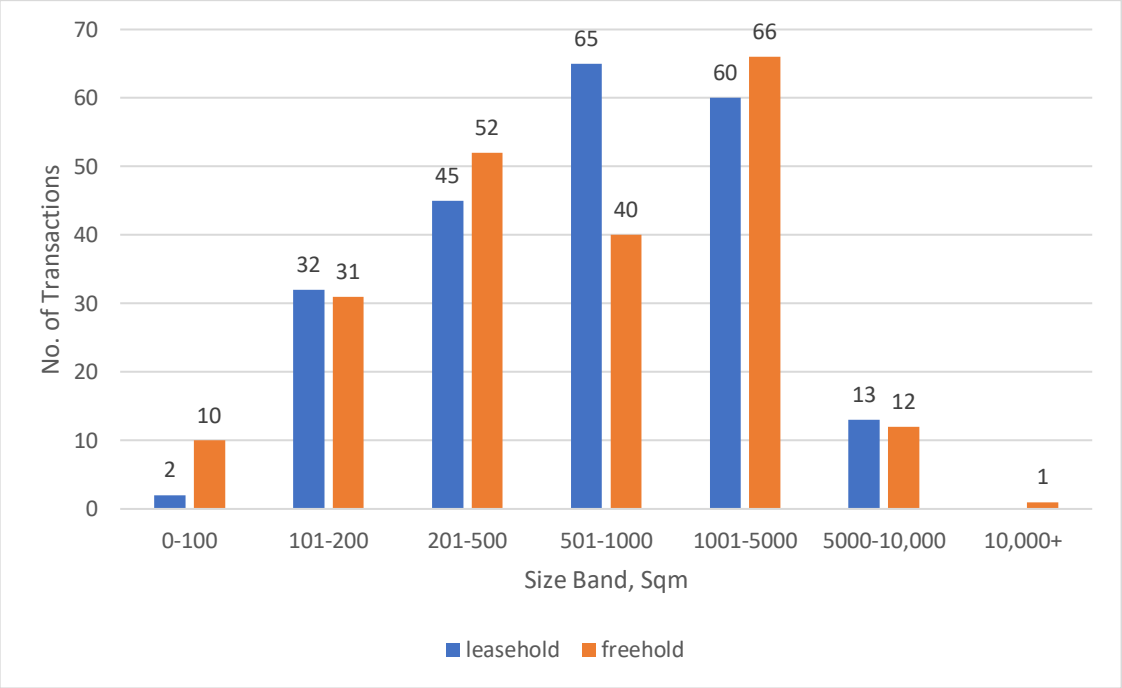
4.46 The 201-500 sqm size band saw the most deals, with 45 transactions (33 percent). Deals larger than 5,000 sqm were negligible over the decade, suggesting a limited strategic B2/B8 market within the borough boundary. The largest recorded deal was for 14,323 sqm of floorspace in the Centrum Park, Tewkesbury Road area in 2023. This was clearly exceptional in the context of Cheltenham's recent market.

4.47 2022 was the most active year in terms of deals, with 12 deals recorded totalling 8,849 sqm of floorspace. It was also the year with the most leasehold floorspace traction of the decade. As with offices there is also an active freehold market even if it is slightly exaggerated here by the available data.

Gloucester

4.48 429 leasehold and freehold industrial deals were transacted over the decade within Glocester (see Figure 15), i.e. far more than were recorded in Cheltenham. Together they comprised over 616,129 sqm of floorspace, equating to an annual take up rate of 40 deals and 61,600 sqm of floorspace/year being transacted.

Figure 15 – Gloucester Industrial Market Transactions, 2016-2026, by Sqm Size Band



Source: Nimbus, 2026

4.49 Again mid-sized industrial premises was most commonly traded, particularly units of 500-5,000 sqm. Activity in the 0-100 sqm and 5,000 sqm+ size bands was again proportionately modest.

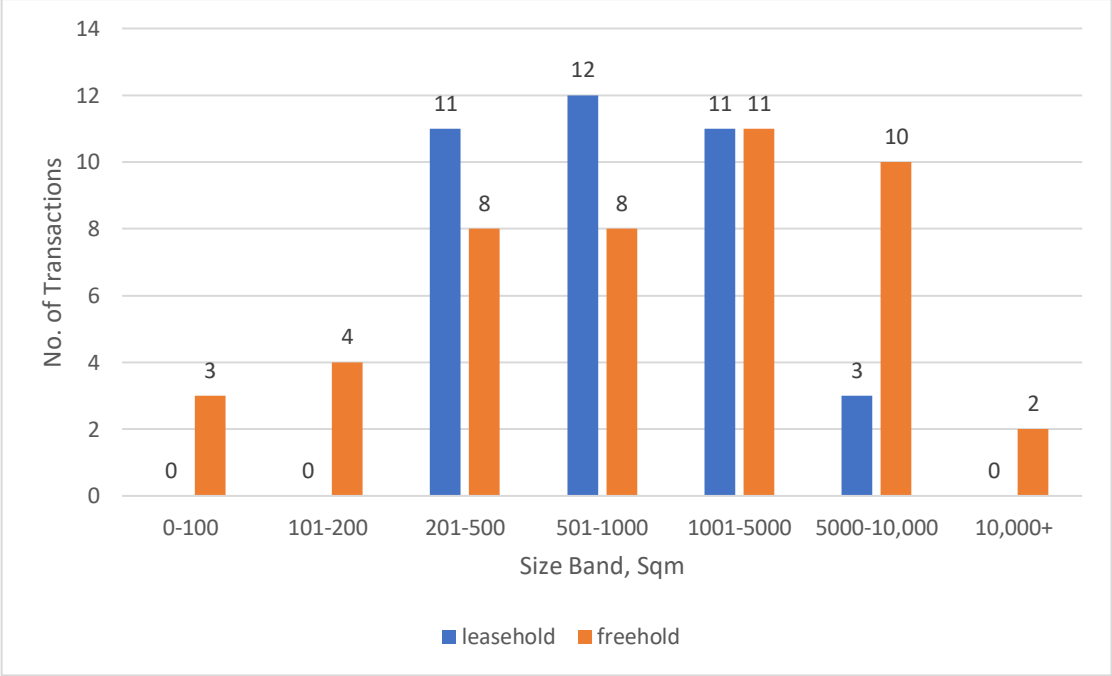
4.50 The largest transacted building was Unit 1 at Centre Seven, Barnwood. It was a freehold sale for a building at 11,305 sqm in 2021. The largest leasehold letting was 38 Ashville Road in 2020, at 8,106 sqm.

4.51 2023 was the most active year for deals with 81 deals occurring, totalling 100,803 sqm of floorspace. It was also the year with most floorspace transacted with the next closest being 2022 with 81,564 sqm of floorspace and 46 deals. This suggests that Gloucester's industrial market has remained strong post the Covid-19 Pandemic. Again there is an active freehold market.

Tewkesbury

4.52 Interestingly the number of deals recorded in Tewkesbury, 83 (see Figure 16), was much smaller than in Gloucester, and only slightly more than in Cheltenham. This is despite Tewkesbury having the largest overall stock of premises, as noted above. Those 83 deals totalled 209,371 sqm of floorspace.

Figure 16 – Tewkesbury Industrial Market Transactions, 2016-2026, by Sqm Size Band



Source: Nimbus, 2026

4.53 As elsewhere, mid-sized units of 201-5,000 sqm were most commonly transacted, but Tewkesbury also saw a proportionally high number of deals for units of 5,000-10,000 sqm. 136,509 sqm of the traded floorspace was in units of this larger size range, almost two thirds of the total. Over half of the transactions recorded were for units in excess of 1,000 sqm suggesting an active market for larger premises in Tewkesbury that was less evident elsewhere.

4.54 2023 was the most active year for leasehold transactions with 10 deals, totalling 18,240

sqm of floorspace, whilst 2024 was the year with the most freehold sales with 13 deals, totalling 39,292 sqm of floorspace.

Prime Industrial Rents

4.55 From past transactions, prime industrial rents can be identified as:

- Cheltenham – Prime rents of £8 - £11/sqft (£86-118/sqm) are being achieved for modern light industrial/trade units of up to 100 sqm at locations such as Kingsditch Trading Estate (The Runnings). For larger units £9.50/sqft (£102/sqm) appears to be the highest achievable level.
- Gloucester – Prime rents at Gloucester Business Park and for schemes in the west of the city, extending out to Junction 12, M5 are around £12/sqft (£129/sqm) for premises of up to 4,000 sqm. Older premises closer to the city centre is achieving up to £8.75/sqft (£94/sqm).
- Tewkesbury – Prime industrial rents for premises of up to 2,000 sqm are £7-10/sqft (£75-108/sqm). Successful locations, at least in terms of rents include Ashchurch Industrial Estate / Business Centre, Alexandra Way, Tewkesbury town and Tewkesbury Business Park.

Availabilities and Occupancy

4.56 As of April 2026, 42 industrial premises were being marketed within the SLP Area, totalling 94,890 sqm of floorspace. Split by district, the following can be noted:

- Cheltenham – Cheltenham had 15 vacant units on the market at this time, of which five were in the 500-1000 sqm range and four were in the 1,000-2,000 sqm range which aligns with the past transactions. However there was also an absence of units in the 201-500 sqm and 2,001-5,000 sqm ranges which are also a focus of market activity. Average quoting rents are £11.66/sqft (£126/sqm) and the supply included two recently developed high specification trade/warehouse units at Kingsditch Trade Park.
- Gloucester – 13 units were on the market as of April 2026, all but four in the 500-5,000 sqm size range evident in past transactions. Within that range, the main supply gap appears to be for units of 1,500-4,000 sqm. Innsworth Technology Park is the main source of units of 400-1,000 sqm with three units on the market at the time of writing. The average quoting rent was £7/sqft (£75/sqm).
- Tewkesbury – 14 units were on the market, six within the 500-1,000 sqm size range. There was an absence of 1,000-5,000 sqm premises which might meet larger local requirements, although there were three properties in excess of

10,000 sqm which might support strategic needs. The largest marketed property was Trident 256 at 6400 Severn Drive, Tewkesbury town at 24,851 sqm. The average quoting rent is £10.27/sqft (£110/sqm).

4.57 Compared to the total floorspace figures noted above, industrial/warehouse stock in the SLP Area is 98.7 percent occupied by premises numbers and 95.2 percent occupied by floorspace. Split by local authority area, the occupancy rates are:

- Cheltenham – 98.1 percent occupied by premises, 94.4 percent occupied by floorspace
- Gloucester – 98.8 percent occupied by premises, 97.6 percent occupied by floorspace
- Tewkesbury – 98.9 percent occupied by premises, 93.7 percent occupied by floorspace.

4.58 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 higher occupancy rate is an indicator of a full market with businesses having difficulties in finding adequate premises. A lower occupancy rate indicates long-term unoccupied and derelict stock and poor business growth.

4.59 By this measure, stock in the SLP Area is constrained in terms of premises numbers. There is also a shortage of available floorspace in Gloucester.

Industrial Agent Comments

4.60 Comments from commercial industrial agents, along with public sector officers, where sought. The comments given primarily relate to the SLP Area and local markets.

4.61 Overall, stakeholders report a strong industrial market across the SLP Area, with good rental growth and low vacancy rates. Multi-occupancy terraced units are increasingly popular, while supply, against demand, is very tight.

4.62 Demand is strongest for leasehold premises up to 5,000 sqm, while the most acute shortage is for units of 2,000-5,000 sqm. There is more supply of sub-2,000 sqm units, but not always of the higher quality units businesses need when they want to expand from older accommodation.

4.63 Gloucester has a strong second-hand market which sees a lot of refurbishment of properties. Locations extending west on the A38, to Junction 12, M5 are most desirable to businesses, with requirements for properties of up to 5,000 sqm which can achieve £10.00-12.50/sqft (£108-135/sqm) new. Second hand rents are around £8.50/sqft (£91/sqm).

4.64 In Tewkesbury, Gloucester Business Park and Gloucestershire Airport are the strongest locations, even though, the latter has weaker links to the M5. Both have established clusters of Advanced Manufacturing firms, especially in Aerospace and Defence. Junction 12, M5 is the focus for logistics activities while warehousing demand was felt to extend this to Junctions 9-10, M5.

4.65 In Cheltenham, industrial estates are more focused towards trade and service uses, in older stock with more limited access to the M5.

4.66 The Advanced Manufacturing sector specifically, requires modern, high grade light and general industrial stock. A good nearby example of an industrial schemes, focused on Advanced Manufacturing sector is Indurent Park at J12, M5. This offers 22 units of 545-5,355 sqm. Businesses may also have a need for power provision above standard. Advanced Manufacturing inward investment requirements can extend up to 5,000-10,000 sqm and need space for future growth or companies may be lost. Stakeholders do not report strong interest for linked manufacturing and logistics facilities, with warehousing requirements primarily coming from retails and third party operators, reflecting wider national trends.

Summary

4.67 Stakeholders identified that there is a steady flow of investment into the county and SLP Area from the US and Europe, focused towards Cyber, Defence (esp. Aerospace), Renewable Energy (energy from waste facilities) and Agri-Tech. Finance/Professional Services is, however, seeing a decline in investment as more services move online.

Offices

4.68 After the Covid-19 Pandemic the switch to hybrid and home-based working impacted upon demand for office space, with businesses reassessing their size needs with for a hybrid workforce. However, there is also a desire from businesses to bring workers back into the office as much as possible and office spaces that are attractive to workers and

well-connected are more likely to achieve this objective. The market is seeing growth in demand for smaller floorspaces, with high to very high amenities and fit out, that are well serviced by transport and surrounding facilities. In the South West, Bristol is the key market centre, achieving rents well above averages in the SLP Area and offering significant competition to other centres, including Cheltenham and Gloucester.

4.69 As of March 2026 there were 2,890 office properties in the SLP Area, 58 percent of the of the stock for Gloucestershire and 8.2 percent of the stock of the whole South West. These 2,890 properties comprised some 662,000 sqm of floorspace, focused in Gloucester and particularly Cheltenham.

4.70 In terms of past transactions, over the last decade, market activity across the SLP Area was focused towards smaller suites of less than 500 sqm, and particularly of 100-200 sqm. Larger deals, particularly for properties of more than 5,000 sqm were very infrequent and only occurred in Cheltenham and Gloucester. Prime rents achieved were highest in Cheltenham at £24-30/sqft (£258-323/sqm), in high grade town centre/Prominade locations. This compares to £18-20/sqft (£194-215/sqm) in Gloucester, for high grade space in the City Centre or Docks. In Tewkesbury, prime rents of around £18/sqft (£194/sqm) were achieved with key locations including Ashchurch and Tewkesbury business parks as well as town centres.

4.71 Compared to the total office floorspace figures noted above, office stock in the SLP Area is 97.2 percent occupied by premises numbers and 95.2 percent occupied by floorspace. This suggests some constraints in supply by premises numbers, especially in Cheltenham, less so by floorspace.

4.72 Commercial office agents, and public sector officers, note that Cheltenham is a focus for the office market in the SLP Area. Leasehold suites of 200-500 sqm are most in demand. Cheltenham has a constrained supply, especially outside of the town centre and for higher grade stock. Outside of Cheltenham, Gloucester Business Park is the main focus for demand, with more limited local markets in Gloucester city and across the rest of Tewkesbury, including at Gloucestershire Airport.

4.73 Development at West Cheltenham (Golden Valley) is expected to boost demand in the Digital and Technologies sector. Stakeholders report that companies in this sector tend to enter the Gloucestershire market as start-ups, only requiring offices of 1-6 desks in multi-let space. However, they then expand quickly so a lot of grow-on options are

needed. There is some demand for data centres, however, requirements for these also variable and footloose, so not something which can easily be planned for.

Industrial/warehouse

4.74 The industrial/warehousing market throughout the UK performed significantly better than the office market through the pandemic period with particular growth in the logistics sector. The South West logistics and industrial market experienced a major resurgence in 2025 with take up significantly above 2024 levels. Recent market activity has been driven by Third-Party Logistics (3PL) firms, which accounted for over half of all transactions, alongside major retail brands. Against high demand, supply remains modest.

4.75 As of March 2026 there were 3,100 industrial and warehouse properties in the SLP Area, 40.5 percent of the of the stock for Gloucestershire and 4.9 percent of the stock of the whole South West. These 3,100 properties comprise some 1.975 million sqm of floorspace.

4.76 Over the last decade, most market activity was for mid-sized properties of 200-5,000 sqm, although Tewkesbury also saw a proportionally high number of deals for units of 5,000-10,000 sqm. Over half of the transactions recorded Tewkesbury were for units in excess of 1,000 sqm suggesting an active market for larger premises here that was less evident elsewhere. Prime rents in the SLP Area, of £12/sqft (£129/sqm) were recorded at Gloucester Business Park. Elsewhere, rates of £8 - £11/sqft (£86-118/sqm) are the best achieved.

4.77 As of April 2026, industrial/warehouse stock in the SLP Area was 98.7 percent occupied by premises numbers and 95.2 percent occupied by floorspace. Again, this suggests supply shortages by premises numbers, in this case spread fairly evenly across all three local authority areas.

4.78 Stakeholders report a strong industrial market across the SLP Area, with good rental growth and low vacancy rates. Demand is strongest for leasehold premises up to 5,000 sqm, while the most acute shortage is for units of 2,000-5,000 sqm.

4.79 Gloucester has a strong second-hand market while locations extending west on the A38, to Junction 12, M5 are most desirable to businesses. In Tewkesbury, Gloucester Business Park and Gloucestershire Airport are the strongest locations. Both have

established clusters of Advanced Manufacturing firms. In Cheltenham, industrial estates are more focused towards trade and service uses, in older stock with more limited access to the M5.

4.80 The Advanced Manufacturing sector specifically, requires modern, high grade light and general industrial stock. Businesses may also have a need for power provision above standard. Advanced Manufacturing inward investment requirements can extend up to 5,000-10,000 sqm and need space for future growth.

5.0 EMPLOYMENT LAND ASSESSMENT – CHELTENHAM

Introduction

5.1 This section looks at the portfolio of employment land, which was available, as of Spring 2026, to meet the employment land needs of Cheltenham to 2046, as identified in the HENA (see Section 2.0). It also reviews 16 Employment Areas (industrial estates, business parks, etc.) which contain the bulk of the developed E(g)/B-Class premises in Cheltenham considering the scale and nature of the offer they present to the sub-regional market.

5.2 Cheltenham needs a balanced portfolio of land to accommodate a sustainable, growing economy that can respond to dynamic market conditions, changing business needs and working practices.

Employment Land Assessment

Baseline Employment Land Supply

5.3 The baseline supply for Cheltenham includes the JCS allocations 'Policy A4 North West Cheltenham' which provides 23.4 ha of employment land (considered as part of the Cheltenham supply as it falls on the edge of Cheltenham but mostly falling into Tewkesbury) and 'Policy A7 West Cheltenham' which provides for 45.0 ha of employment land as the Golden Valley scheme. Policy EM1: Employment Land and Buildings of the Cheltenham Plan (2020) identifies four local development sites:

a. Land south of Jessop Avenue, Town Centre (E1) – Now developed for a six storey office development (7,490 sqm) (App. No. 16/01417/FUL)

b. Land adjacent to B&Q, The Reddings (E2) (0.86 ha) – Consented for the Erection of 3,384sqm of office headquarters (App. No. 12/01488/FUL). Scheme not implemented. Includes sites Land to rear of Nuffield Hospital, Hatherley Lane A and Land to the Rear of Nuffield Hospital, Hatherley Lane B.

c. Land north-west of Grovefield Way, The Reddings (E3) – Consented for a mixed use development for 5,914 sqm of commercial office space, a 502 sqm day nursey, a 1,742 sqm supermarket unit and a 204 sqm coffee shop drive-thru (App. No. 18/01004/FUL). This consent has been partially implemented with the supermarket, coffee-shop, day nursey having been built. The offices were not considered viable though and this area now has consent for housing. Thus the plot is no longer considered available to meet employment needs

d. Land at Chelt Walk, Town Centre (E4) (0.68 ha) – Not subject to any planning consents and assumed still available to meet needs.

5.4 'Policy H2: Land Allocated for Mixed-Use Development' of the Cheltenham Plan also identifies four sites for mixed-use development. For two of these, E(g)/B-Class uses may form part of the mix:

- Policy MD1: Lansdown Industrial Estate (5.5 ha) – This site is allocated for a mixed-use development, "including a continued element of employment in better-quality units together with some new residential development." The northern part of the site is subject to an application for 215 dwellings (decision awaiting Section 106 agreement) (App. No. 21/02832/OUT) . That same application also proposes the redevelopment of Units 23 and 30 Lansdown Industrial Estate, to provide uses including 425 sqm of commercial uses (Class E(g), B2 and B8). This scheme is considered further below.
- Policy MD3: Royal Well and Municipal Offices (0.90 ha) – Developed site within the town centre currently in use as council offices, bus station, car park and an area of open space. It is allocated for a mixed use allocation for uses appropriate to the town centre, which could include offices. Not subject to any planning consents and assumed still available to meet needs

5.5 The Council has also identified four other unimplemented planning consents with the potential to deliver employment sites of more than 0.25 ha or provide more than 500 sqm of new employment premises:

- Portal Products, Kingsditch (App. No. 18/02102/FUL) – Consent for the demolition of two existing buildings. Change of use to builders' merchant (sui generis) with sales counter, ancillary offices and external storage yard. The proposal would represent a net loss of -2,184 sqm of floorspace, all sui generis so does not provide additional employment land and is not considered further
- Tim Fry Land Rovers, Athelney Way (App. No. 18/00540/FUL) – Consented for the Erection of 18 industrial units for light industrial and storage purposes and associated works following demolition of existing industrial and warehouse buildings. The proposal is for the redevelopment of properties already in E(g)/B-Class use, resulting in a net loss of -732 sqm of floorspace. It does not provide additional employment land and is not considered further
- Former Vibxa Ltd, Runnings Road (App. No. 19/01177/CLPUD) – The Consent is for Change of use for northern corner of site from B2 (general industry) to E(g)

(business). The change of use is within the E(g)/B-Class uses so does not represent a gain of employment land for Cheltenham. It is not considered further

- Dowdeswell Park, London Road (App. No. 23/01260/COU) – The Consent is for Change of use of land from B2 to B8 (storage and distribution). The change of use is within the E(g)/B-Class uses so does not represent a gain of employment land for Cheltenham. It is not considered further.

5.6 Consideration of these different sources of employment land gives a baseline supply of 76.34 ha in six sites, comprising:

- 23.4 ha at Policy A4 North West Cheltenham
- 45.0 ha at Policy A7 West Cheltenham
- 1.54 ha in two, as yet undeveloped, sites allocated under Policy EM1: Employment Land and Buildings of the Cheltenham Plan (2020)
- 6.4 ha in two, as yet undeveloped, mixed-use sites allocated under Policy H2: Land Allocated for Mixed-Use Development of the Cheltenham Plan (2020)

Employment Sites Analysis

5.7 Analysis of those eight sites is considered in proformas at Appendix 2 and mapped in Appendix 5. Table 25 provides a summary of that assessment.

Table 25 – Summary of Employment Sites Assessment (Land Supply)

Site Reference	Site Name and Address	Baseline Employment Land Supply, ha	Comments	Conclusions/ Recommendations	Availability, Years	Realistic Employment Supply – Land, ha – Gross (Net*) Floorspace, Sqm**
Policy A4, JCS	North West Cheltenham	23.4	Six owners across the wider strategic site. Land identified for employment is mostly owned by Gloucestershire County Council and Persimmon Homes. Elms Park Consortium comprising Persimmon and Bloor Homes is the developer. The wider site has Outline Consent (subject to the signing of a 106 agreement) "for up to 4115 new homes providing a range and choice of mix and tenure, including affordable housing (C3) and elderly persons accommodation (C2/C3 up to 200 units), 24 ha of employment generating uses including 10 ha B1 business park (up to 40,000 sqm), a hotel (C1 up to 200 rooms), and mixed use centres providing retail uses and community facilities (A1 - A5 up to 6,150 sqm, D1/D2 up to 3,000 sqm), a transport hub and public transport inter change, primary and secondary school education (D2), new areas of green infrastructure including areas of play sports hub, woodland planting, allotments and habitat at creation, creation of new means of access onto Tewkesbury Road and Manor Road, new footways and cycleways, and energy and drainage infrastructure." The initial scheme, known as Elms Park, was progressed by Persimmon and Bloor Homes. Housing is now being delivered here. The core employment area is identified as 'Elms Park Centre of Enterprise', a high quality Business and Enterprise Park. It will be delivered within Phase 1 of the wider scheme	Key strategic site. The principle of development is now established here but it is recommended that more clarification be sought here as to who, to what timetable and with what resources, will be responsible for delivering the employment elements. The site should be protected for E(g)/B-Class uses in the SLP.	5-10	23.4 (14.04) 56,160

Site Reference	Site Name and Address	Baseline Employment Land Supply, ha	Comments	Conclusions/ Recommendations	Availability, Years	Realistic Employment Supply – Land, ha – Gross (Net*) Floorspace, Sqm**
			Elms Park Consortium has overall responsibility for delivery, but it is unclear who will ultimately develop the employment premises and to what exact timeframe. It is noted that Gloucestershire County Council owns the A4019 Tewkesbury Road land so is in a position to push forward commercial development here. The aspiration is for a high quality business park, which will build on the growing Digital and Technologies/Defence cluster to be brought forward in West Cheltenham. However, it will likely broaden out to bring in other sectors such as Advanced Manufacturing, Financial Services, Digital and Technologies and Professional and Business although this will be subject to more detailed information on the nature of the business park to be delivered. Overall, this land is in a strong location on the A4019 Corridor which links many of Cheltenham's existing Employment areas, and the town centre, to J10, M5. This Corridor is likely to be a focus for local growth. Constraints • Trees onsite • Housing onsite • Houses and farms onsite • Includes areas of land subject to surface water flooding (Other areas of Flood risk are outside of the employment area).			
Policy A7, JCS	North West Cheltenham	45.0	Multiple owners including Cheltenham Borough Council, Highways Gloucestershire, Private	Key strategic site for the SLP Area and particularly a key future source of modern office premises which may prove	1-5	45.0 (19.6) 77,871

Site Reference	Site Name and Address	Baseline Employment Land Supply, ha	Comments	Conclusions/ Recommendations	Availability, Years	Realistic Employment Supply – Land, ha – Gross (Net*) Floorspace, Sqm**
			Individual (Developer is HBD Golden Valley, part of Henry Boot). Outline Consent for a phased development to provide non-residential floorspace comprising flexible commercial and community uses (Use Classes E, F and Sui Generis), new homes (Use Class C3) and other associated infrastructure (App. No. 23/01875/OUT) Reserved Matters consent for Reserved Matters (layout, scale, appearance, landscaping and access) for Phase 1 of development, an Innovation Centre with ancillary cafe and event spaces, a Mobility Hub) with flexible retail and community uses on the ground and first floor, and all associated infrastructure and open spaces (App. No. 26/00001/REM). Approved in April 2026. Multiple Discharge of Conditions consents. The Outline Consent, which covers the whole site proposes 298 flats, 278 houses and 92,985 sqm of commercial space which includes 77,871 sqm of E(g) class offices, research and development and light industry. At a standard developer ratio, 77,871 sqm would require 19.6 ha of land. The Full Consent proposes the three story Innovation Centre (The National Cyber Innovation Centre) of 15,245 sqm as an early phase of development. It will be located in the centre of the site, accessed off the existing roundabout junction of Fiddlers Green Lane and Telstar Way. Contractors have been appointed on this project which is expected to commence in summer 2026.	difficult to viably deliver elsewhere. It will be essential for the growth of Digital and Technologies in the sub region. Development is consented and a phase one scheme is being actively progressed. It should be protected for relevant uses in the SLP.		

Site Reference	Site Name and Address	Baseline Employment Land Supply, ha	Comments	Conclusions/ Recommendations	Availability, Years	Realistic Employment Supply – Land, ha – Gross (Net*) Floorspace, Sqm**
			Council officers report that discussions are underway with a range of business occupiers for this scheme, but further details remain confidential at this time. The scheme benefits from a £104 million funding package, including £20 million from the UK government, complemented by private sector investment. Focused on Cyber Industries the new facilities will accommodate a diverse range of companies, linked to Digital and Technologies and overlapping with Defence, other service sectors and likely Advanced Manufacturing. Constraints • Trees on Site • Parts of the site are subject to surface water flooding • Housing adjacent, with existing farms in the area.			
Local Plan Policy EM1, E2	Land adjacent to B&Q, The Reddings (Includes Land Rear of Nuffield Hospital, Hatherley Lane A and B)	0.86	Claxton Trading Ltd, Pooks Investment Ltd, Kier Construction Ltd own • Site A: Full consent, now implemented, for a change of use to a self-storage yard (B8), erection of storage units and associated works, including new boundary fencing, car parking and landscaping (App. No. 24/01666/FUL) • Site B: Full consent for a 3,384 sqm of office headquarters (App. No. 12/01488/FUL). The consented office was on the market as a development opportunity, marketed as Hatherley Place by agents Lamber Smith Hampton and Alder King for several years from 2021, but is not marketed	Site has a temporary use on it, but remains available for long term development, building on a range of facilities in the immediate area. It should be protected for E(g)/B-Class uses in the SLP.	5-10	0.86 (0.77) 3,080

Site Reference	Site Name and Address	Baseline Employment Land Supply, ha	Comments	Conclusions/ Recommendations	Availability, Years	Realistic Employment Supply – Land, ha – Gross (Net*) Floorspace, Sqm**
			anymore. It is not clear if there are any further plans for this land other than the current self-storage use. The adjacent office building, a multi let Pure Office scheme, accommodates a range of micro firms in Financial Services, Digital and Technologies and Professional and Business Services. Cheltenham Film Studios are also close by, as is GCHQ and this site could be developed to support these facilities, particularly accommodating micro and small firms, even if viability is likely to be a barrier to an office development. Constraints • Parts of the site are subject to surface water flooding.			
Local Plan Policy EM1, E4	Land at Chelt Walk, Town Centre	0.68	Cheltenham Borough Council, BW SIPP Trustees own The eastern part of the car park, partly unserviced, is a temporary car park with consent for this ending in 2026 (App. No. 23/01314/FUL). No identified development plans, but the site remains available and mostly under Council ownerships adjacent to some the highest grade office buildings in Cheltenham. Links to an established office cluster which accommodates a range of high value service uses in Financial Services, Professional and Business Services plus a range of Digital and Technologies companies such as Iress. A new office development here, although potentially difficult to deliver viably here, could build on this inner urban cluster. Constraints	No development plans, but this remains a valuable Council-owned development site adjacent to a key office cluster. It should be protected for E(g)/B-Class uses in the SLP.	10-15	0.68 (0.61) 2,440

Site Reference	Site Name and Address	Baseline Employment Land Supply, ha	Comments	Conclusions/ Recommendations	Availability, Years	Realistic Employment Supply – Land, ha – Gross (Net*) Floorspace, Sqm**
			• Grade II listed building adjacent • Within a Conservation Area • Has a Public Right of Way runs though it • Site is in Flood Zones 2/3 • Parts of site may be susceptible to surface water flooding.			
Local Plan Policy H2, MD1	Landsdown Industrial Estate	5.50	Outline planning application for up to 215 dwellings with associated access roads, parking and public open space following the demolition of the existing buildings (App. No. 21/02832/OUT). Outlie consent for mixed use redevelopment of Units 23 and 30 Lansdown Industrial Estate including net 425 sqm of commercial uses (Class E(g), B2 and B8) (linked with above application). The housing application covers the eastern portion of the Industrial Estate, which comprises the bulk of the older low quality premises. Overall, the proposal will result in the loss of 30,472 sqm of floorspace. The Outline Application remains undecided at this time but does have an officers recommendation to approve and is understood to be awaiting conclusion of a Section 106 agreement. For the purposes of this Study it is therefore assumed that this scheme will come forward. Much of the remainder of the Industrial Estate has been recently refurbished – nine units totalling 8,500 sqm – so is unlikely to be redeveloped. Future plans include the redevelopment of three low grade units to create two new units of around 288 sqm each, together with physical enhancements to the entrance to the Estate, improvements to public	-	-	-

Site Reference	Site Name and Address	Baseline Employment Land Supply, ha	Comments	Conclusions/ Recommendations	Availability, Years	Realistic Employment Supply – Land, ha – Gross (Net*) Floorspace, Sqm**
			accessibility between the Estate and Roman Road. Also the development of some 604 sqm of new build employment space, some of which will provide a direct replacement for existing poor quality space elsewhere on the estate. Overall, however plans suggest a net loss of employment land and floorspace, from the housing development with the new units proposed mostly replacing existing properties. As such the gains here cannot be considered additional supply and are not counted towards the employment land/premises supply totals.			
Local Plan Policy H2, MD3	Royal Well and Municipal Offices	0.90	Cheltenham Borough Council own A Masterplan has been produced incorporating the Municipal Buildings, Royal Well Road, Promenade and the Long Gardens. This does not appear to propose any E(g)/B-Class employment in this area with the Municipal Offices to become a 125-room spa hotel, event space, and banqueting venue. It is thus assumed that relevant floorspace will not be provided here and it cannot be counted within the employment land supply.	-	-	-
Total		**76.34**	**-**	**-**	**-**	**69.94 (35.02) 139,551**

Source: BE Group, CBC, Other Stakeholders, 2026

*The Net site size is either identified from planning consents, stakeholder engagement or, where these are not available, uses an 'efficiency ratio' of:

- Small Sites (<2ha): 85-90 percent efficiency
- Medium Sites (2-10ha): 75 – 85 percent efficiency
- Large Sites (10ha +): 60-75 percent efficiency.

This deducts land for:

- Strategic Green Infrastructure
- Sustainable Drainage Systems
- Transport Infrastructure – Major spine roads and dedicated corridors (not on-site parking and manoeuvring areas). It assumes a smaller site will use existing infrastructure surrounding, i.e. existing roads in an industrial estate, while a larger site will require more internal infrastructure, hence have a lower efficiency ratio
- Topographical constraints.

**Again floorspace uses either figures provided in planning consents, by stakeholders or, where these are not available uses a standard developer ratio of 4,000 sqm/hectare or 40 percent site coverage for buildings, with other land used for car parking, internal roads, greenspace, etc.

5.8 As Table 25 shows of the baseline land supply of 76.34 ha in six sites, 35.02 ha or 139,551 sqm in four sites appears realistically available to meet local needs. This reflects the following adjustments:

- That Local Plan Policy H2, MD3: Royal Well and Municipal Offices is unlikely to be redeveloped/refurbished to provide significant office space
- That consents at Local Plan Policy H2, MD1: Landsdown Industrial Estate will result in a net loss of E(g)/B-Class floorspace in the area
- The netting of sites, either allowing for the land/floorspace referenced in planning consents or reflecting the standard approach set out below Table 25.

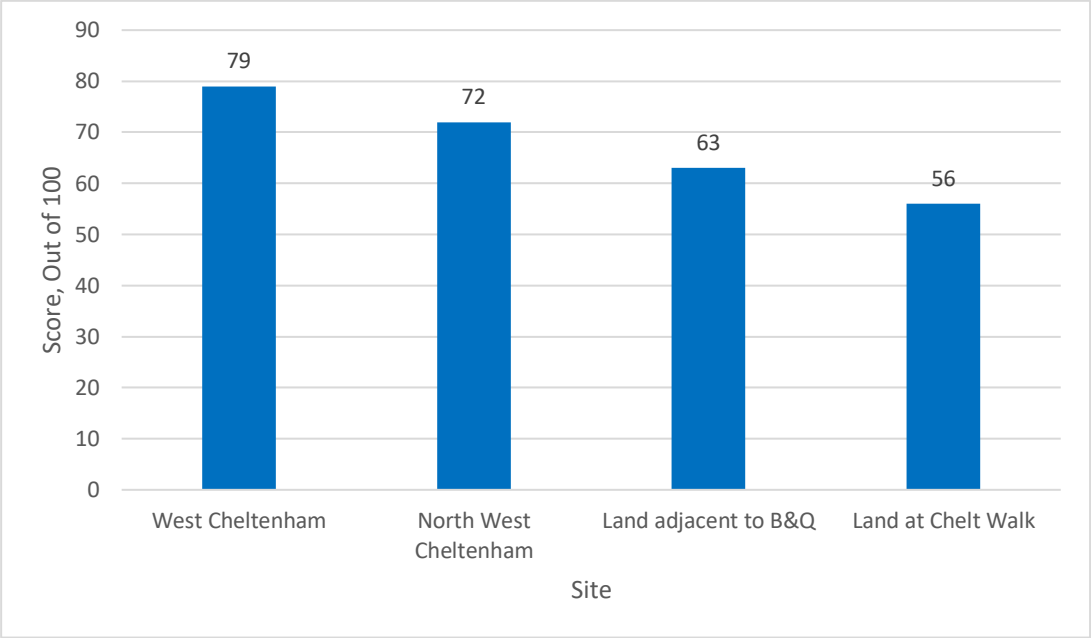
5.9 The JCS Allocations in, or on the edge of, Cheltenham – North West and West Cheltenham – could provide a net supply of 33.64 ha or 134,031 sqm (96.1 percent of the land supply). In both cases schemes have at least Outline consent in place and some developer partners identified. West Cheltenham (Golden Valley) is most advanced, with Full planning consent secured for a three story Innovation Centre (The National Cyber Innovation Centre) of 15,245 sqm as an early phase of development. Contractors have been appointed on this project which is expected to commence in summer 2026. Discussions are underway with occupiers for this, and other properties here.

5.10 These sites are likely to be the focus of office development in the SLP Area, particularly at A7: West Cheltenham where proposals are for offices focused on Digital and Technologies (Cyber Security) and Defence, supporting nearby GCHQ. It is not possible to say exactly what proportion of this stock will be delivered for offices however, as larger strategic projects remain at an early stage and are expected to include industrial (esp. Advanced Manufacturing), warehouse, R&D and Data Centre uses as well.

Site Scoring – Realistic Supply

5.11 Each Site has been scored against ten criteria relating to Site Location and Access, Development Prospects, Site Conditions and Availability. The maximum score possible is 100. The Scoring Criteria can be found in Appendix 3 and individual site scores can be found in Appendix 4. Figure 17 shows the scoring for the four sites identified as comprising Cheltenham's realistic long-term supply. The assessment gives an appraisal of the overall quality of the land resource and provides one measure of what sites could be considered priorities for SLP allocation and what sites are of secondary value.

Figure 17 – Sites Scoring – Realistic Supply



Source: BE Group, 2026

5.12 The highest scoring site is A7: West Cheltenham, reflecting the advanced nature of development plans here, lack of site constraints and its prominent position close to the A40 and Junction 11, M5. E4: Land at Chelt Walk scores lowest. Despite being centrally located in Cheltenham, the site has no development plans associated with it and is subject to a range of constraints.

Employment Area Assessments

5.13 Consideration of the 'Cheltenham Economic Strategy: Developing Cheltenham as a Business Location, Appendix A Local Employment Assessment (2015)', the Cheltenham Plan (2020) and discussions with Officers identifies 16 Employment Areas for analysis in this Study. Each has been appraised and assessed through a combination of site visits, existing Council data, local intelligence and the views of those involved in the property market in those areas.

5.14 Maps of the 16 areas are provided at Appendix 5, based on their Name.

5.15 Consistent with the approach used in Gloucester and Tewkesbury, proformas have been created for each area (and are provided at Appendix 6), based on the following format,

to simplify the data and make it easier to interpret:

- 'Name (address)' is the local authority's designated title for the area, plus any incorporated sub-areas.
- 'Reference' is the reference number for the area, as designated by this study, alongside any relevant policy numbers from the Cheltenham Plan (2020).
- A brief 'Description' is provided in the form of BE Group's comment on the area
- 'Key Occupiers' identifies the most significant businesses operating within the area.
- 'Dominant Uses/Business Sectors' provides a description of the main uses on the area, e.g. financial services, advanced manufacturing, general industry, engineering, motor trade, warehousing, etc. with reference to the nine Key Sectors identified and discussed in Sections 2.0 and 3.0.
- 'Links to Key Economic Clusters' considers what wider business clusters does the area relate to now and what clusters might it contribute further to in the future.
- A current occupancy rate is provided as a percentage of the total number of units in the area.
- The size of the area, in hectares, is provided based on data provided by the local authority.
- 'Building Age' considers the average age of the majority of properties in the area with the age categories used being – pre-1945, 1945-1990, 1990-2010, 2010+ (modern).
- 'Building Quality' takes a subjective view on the quality of premises in each area and considers whether the bulk of the units can be classified as Derelict, Poor, Average or Good.
- 'Area Constraints' are identified, which could include the proximity to planning designations such as Conservation Areas and Listed Buildings, flood risk, the proximity of overhead pylons and other physical issues.
- In 'Opportunities for redevelopment/ expansion', vacant land is identified, as is the scope for redevelopment of particular vacant/derelict properties or sites. Greenfield expansion possibilities are also included, showing opportunities for the growth and intensification of the E(g)/B-Class uses here.
- 'Recommendations' are provided on the main issues of the Area, its future prospects for supporting growth and whether it should be protected for E(g)/B-

Class uses in the SLP. Any required adjustments to Area boundaries, for future Local Plan mapping are also set out.

- Finally, 'Grade' refers to BE Group's professional opinion on the ranking that should be afforded to the individual area. This has been based on a consideration of the above data and BE Group's professional opinion on each area, reflecting site visits and relevant stakeholder comments. Combining this data leads to an overall hierarchical assessment banded A to E. These are described in Table 26.

Table 26 – Grades A to E Definitions

Grade	Definition	Action
A	High quality, prestigious, flagship business areas due to their scale, location and setting. Capable of competing for investment in the regional market place. These are prime sites for marketing to a cross section of users including new inward investors. They can also meet the needs of image-conscious, aspirational companies already in the local authority area	Protect strongly in the SLP Support and expand
B	Good employment sites due to their scale, location and setting. Capable of competing for investment in the sub-regional market place. These are prime sites for marketing to a cross section of users, E(g), B2 and B8, including some new inward investors.	Protect strongly in the SLP Support and expand
C	Key employment sites with an influence over the whole local authority area but primarily geared towards local businesses and E(g)(iii) light industrial, B2 and B8 uses.	Protect in the SLP Support
D	Lower quality locations in residential or rural areas suffering from poor accessibility and massing.	Continue to protect/review through the SLP
E	Very poor quality areas. Widespread vacancy and dereliction in poor environments. Or areas which have been, or are in the process of being, lost to other uses.	Promote alternative uses if possible

Source: BE Group 2026

5.16 Table 27 summarises the findings on each Employment Area.

Table 27 – Assessment of Existing Employment Areas (Existing Premises)

Area Reference: Name	Area, ha	Employment Area Description	Summary of Major Occupiers, Key Sectors and Clusters (Occupancy Rate)	Area Constraints	Opportunities for redevelopment/ expansion	Recommendations	Site Grading
C1.1 (EM1): Kingsditch Industrial Estate	52.1	A large industrial estate filled with warehouse and industrial businesses. The area is accessed off the main A4019 Tewkesbury Road and is dominated by trade uses, interspersed with larger B2/B8 facilities in the north west.	UBICO, Protyre, Screwfix, Spirax Sarco, VarDAR Systems, Inchcape Volkswagen, Engineered Systems Dominated by trade and motor trade uses. Includes a cluster of Advanced Manufacturing business in the north west including Spirax Sarco and Engineered Systems. This provides a modest cluster which the adjacent Policy A4: North West Cheltenham proposals can build upon. (99)	• The north of the Area is in Flood Zones 2/3 • Includes areas of land at risk from surface water flooding	Existing Area appears fully developed. Policy A4: North West Cheltenham is located to the west and will be the focus of further growth.	Reasonable quality employment area, which has seen some recent development, albeit for trade uses which can be found throughout the area now, not just on land excluded from the existing allocation. It does also include a cluster of higher value manufacturing and engineering firms in the north west which should be a priority for protection in the SLP.	B
C1.2 (EM1): GCHQ Benhall	19.5	A large circular office building housing the UK's cyber security agency, surrounded by extensive car parking in a mostly residential area.	GCHQ Cyber security/ ICT A focus for Digital and Technologies and Defence activities in Cheltenham. Proposals at Policy A7: West Cheltenham will develop to support and expand upon its operations. (100)	• Surrounded by housing • Includes areas of land at risk from surface water flooding.	Site in full use.	Site for a major employer of national significance, key to further growth in Cheltenham. It should be protected in the SLP for E(g)/B-Class uses.	A
C1.3 (EM1): Jessop Avenue, Cheltenham Town Centre	1.10	Three high grade, multi store and multi occupancy office buildings, centrally located in Cheltenham.	West Healthcare, Salpo Technologies, Agilis Recruitment, Byrd + Link, Iress, Attivo. Key office cluster in central Cheltenham. Accommodate a diverse range of businesses in sectors including Professional and Business Services, Financial Services, Digital and Technologies as well as some healthcare businesses. (100)	• Land is in Flood Zones 2/3 • In a Conservation Area • Includes areas of land at risk from surface water flooding	Adjacent car parking comprises allocated Local Plan Site E4: Land at Chelt Walk, Town Centre (0.68 ha).	Identified by stakeholders as a key source of Grade A offices, not readily found elsewhere and serving the whole SLP Area, and beyond. This area should be protected for E(g)/B-Class uses in the SLP. The current area boundary excludes St James House which has recently been refurbished to provide Grade A offices. This should be included in a future allocation.	A
C1.4 (EM1): UCAS Site, New Barn Lane, Cheltenham	2.73	Large, secure modern brick built office complex for UCAS, in a residential area.	UCAS Education/administrative use, distant from other clusters. (100)	• Includes areas of land at risk from surface water flooding • Housing adjacent.	Offices include gardens which could be built upon, but this would impact on the amenity of the existing office and adjacent housing.	Office for a major employer of national significance. This area should be protected for E(g)/B-Class uses in the SLP.	A
C1.5 (EM1): Tewkesbury Road - Neptune Business Centre / Cheltenham Trade Park / Space Business Centre	3.29	Modern industrial park, focused on trade uses, prominently located off the A4019 Tewkesbury Road and offering mostly smaller units. Includes Space Business Centre which comprises small modern workshops for local micro businesses.	Cheltenham & Gloucester Flowers, Clay & Rock, Albany Windows. Primarily trade uses. No strong links to Key Clusters. (80)	• Most of the area is in Flood Zones 2/3 • Includes areas of land at risk from surface water flooding.	Includes a car yard in the south, of 0.22 ha which could support a small infill development. Undeveloped land to the south east appears to form part of a larger infrastructure facility for Wales and West Utilities	Local industrial estate, dominated by trade uses in the north, but accommodating a valuable supply of modern workshops in the south. This area should be protected for E(g)/B-Class uses in the SLP.	C

Area Reference: Name	Area, ha	Employment Area Description	Summary of Major Occupiers, Key Sectors and Clusters (Occupancy Rate)	Area Constraints	Opportunities for redevelopment/ expansion	Recommendations	Site Grading
C1.6 (EM1): Cheltenham Trade Park	4.30	Modern industrial park, focused on trade uses, prominently located off Arle Road and with housing adjacent.	Denmans, Plumbase, Service Graphics Primarily trade uses. No strong links to Key Clusters. (100)	• Most of the area is in Flood Zones 2/3 • Includes areas of land at risk from surface water flooding.	Site fully developed	Area has a trade focus but still provides a valuable range of mid-sized units suitable for B2/B8 uses. This area should be protected for E(g)/B-Class uses in the SLP.	C
C1.7: Battledown Trading Estate and Coltham Fields	4.19	Small urban industrial estate, of average quality mid-sized units in the east of Cheltenham.	Outlook Bespoke, Steer Cheltenham, Howdens Trade, Motor Repair, Construction Some construction uses which may support key sectors but generally limited links. (100)	• Includes areas of land at risk from surface water flooding • Housing adjacent	Site fully developed	Area has a trade focus but still provides a valuable range of mid-sized units suitable for B2/B8 uses. This area should be protected for E(g)/B-Class uses in the SLP.	C
C1.8: Mead Road Industrial Estate including Churchill Trading Estate, Liddington Trading Estate and Maida Vale Business Park.	2.46	Small scale, mixed local industrial estate, dominated by trade and motor repair uses comprising units in a mix of sizes, in a mostly residential area.	Travis Perkins, Leckhampton Autocentre, Fixaball, Cotswold Plumbing & Heating Supplies. Trade, Motor Trade, some manufacturing of fastenings and labels. Area includes some traditional industrial uses but has limited links to Key Sectors. (100)	• Includes areas of land at risk from surface water flooding • Housing adjacent	Site fully developed	Site has a trade focus but still provides a valuable range of mid-sized units suitable for B2/B8 uses. This area should be protected for E(g)/B-Class uses in the SLP.	C
C1.9: Lansdown Industrial Estate, including Alstone Lane Trading Estate, St George and Bramery Business Park and The Vineyards Industrial Estate	7.80	Mixed industrial area comprising a range of industrial uses in two main estates bisected by the railway line and comprising diverse uses including a brewery, art gallery, trade/motor trade and catering, in older units which have seen some recent refurbishment.	DEYA Brewing, Cheltenham Auto Repairs, Darcy Galleries. Trade/motor trade, creative industries, catering. Mixed uses, includes some businesses in Creative Industries. (90)	• Includes areas of land at risk from surface water flooding • Housing adjacent	Within Landsdown Industrial Estate: • The east of the area, 2.76 ha is subject to an undecided planning Outline planning application for up to 215 dwellings with associated access roads, parking and public open space following the demolition of the existing buildings (App. No. 21/02832/OUT). • Outlie consent for mixed use redevelopment of Units 23 and 30 Lansdown Industrial Estate including net 425 sqm of commercial uses (Class E(g), B2 and B8) (linked with above application). These are reviewed in the Employment sites section.	Active mixed employment area. Part of Landsdown Industrial Estate is proposed for housing. If this is consented, that land will need to be excluded from and employment allocation. The rest of the area should be protected for E(g)/B-Class uses in the SLP.	C
C1.10: Village Road, Cheltenham	-	Area has been redeveloped for housing.	-	-	-	-	E

Area Reference: Name	Area, ha	Employment Area Description	Summary of Major Occupiers, Key Sectors and Clusters (Occupancy Rate)	Area Constraints	Opportunities for redevelopment/ expansion	Recommendations	Site Grading
C1.11: Kohler Mira, Cromwell Road	2.78	Two large older industrial units occupied by Kohler Mira, in a residential area.	Kohler Mira Manufacturing (domestic showers) Supports the domestic construction industry but limited linkages to Key Sectors. (100)	• Includes areas of land at risk from surface water flooding • Housing adjacent	Site fully developed	Active industrial facility for a major employer. The area should be protected for E(g)/B-Class uses in the SLP.	B
C1.12: Dunkertons, Dowdeswell Park (formerly The Barlands), London Road	2.53	Large cider distillery, including retail and bar/food options in two modern units located off the A40 south east of Cheltenham.	Dunkertons, Holland Cooper, Humble Kitchen Distillery, hot food, leisure, retail Some links to Creative Industries, but is primarily a leisure facility (100)	• Includes areas of land at risk from surface water flooding • In Area of Outstanding Natural Beauty	Undeveloped land in the area is in use for parking.	Although the site includes some distilling and storage uses, it seems to primarily function as a retail and leisure visitor attraction. It would better be allocated as a leisure facility rather than for E(g)/B-Class uses in the SLP.	E
C1.13: Blaisdon Way, off Hayden Road	3.13	Three large modern units, including substantial parking and hardstanding areas, located off old Gloucester Road in a mostly residential area.	GB Liners, Kendon Packaging Manufacturing – Packaging and liners. Three large units but accommodating traditional industries. (100)	• Includes areas of land at risk from surface water flooding • Housing adjacent	Site fully developed.	Small but active local employment area. The area should be protected for E(g)/B-Class uses in the SLP. The unit to the north is in use as a gym and for caravan sales, so does not need to be linked to this Employment Area.	C
C1.14: Prestbury Road and Clevemount Close	0.40	Urban industrial area of older yards and units. The bulk of the site has now been redeveloped for housing, and only one construction yard and a bus depot remain in E(g)/B-Class use, fronting Prestbury Road.	NGB Construction/engineering, bus depot Two businesses with limited links to key sectors (100)	• In Flood Zones 2/3 • Includes areas of land at risk from surface water flooding • Housing adjacent	Remaining site is in full use	Two remaining E(g)/B-Class units of modest economic value. They should be protected for E(g)/B-Class uses in the LP but not to the exclusion of other economic opportunities which might be brought forward here.	D
C1.15: Montis Court (formerly Premier Products), Bouncers Lane	0.50	Two small older units, mostly in trade use. The remainder of the Premier Products site has now been redeveloped for housing.	The Plasterers One Stop Shop and Plastering Superstore Trade/building materials Small construction industry supplier, modest links to Key Sectors (100)	• Includes areas of land at risk from surface water flooding • Housing adjacent • Trees onsite	Remaining site is in full use	Site accommodates a single trade businesses. The company appears active, but overall it is a low priority for protection in the SLP.	E
C1.16 (EM1, Site 7): Hatherley Lane (The Reddings)	0.50	Large modern unit occupied by a high value electronics manufacturer plus Cheltenham Film Studios, to the rear which accommodates a range of micro businesses, located in a mostly retail/leisure area off an A40 junction.	Ultra PCS Electronics, Blue Sky Film and Media, Credo Music Academy, Dee and Griffin Solicitors, the Beauty Studio. Advanced Manufacturing, film and music, financial services and other mixed services. Ultra PCS Electronics is an Advanced Manufacturing company, with links to Defence. Cheltenham Film Studios is a key local cluster of Creative Industries, unique in the SLP Area, which includes some Professional and Business Services and Financial Services companies. (100)	• Includes areas of land at risk from surface water flooding • Housing adjacent • Trees onsite.	Site is in full use and bounded by parkland and housing	Small employment area accommodating a number of high value uses including the unique Film Studios complex. The area should be protected for E(g)/B-Class uses in the SLP.	B
Total	**107.31**						

Source: BE Group, 2026

5.17 Together these 16 Employment Areas comprise 107.31 ha of primarily developed employment land. Where possible, all non E(g)/B-Class uses have been removed from the area boundaries. Where issues remain, these are highlighted in area recommendations.

5.18 C1.1 (EM1): Kingsditch Industrial Estate is the largest area at 52.41 ha, or nearly half the total, followed by C1.2 (EM1): GCHQ Benhall at 19.5 ha. Other area are, with one exception, much smaller at around 4 ha or less, each.

5.19 Many areas include businesses which can be described as falling into one of the Key Sectors, however, areas which include more defined clusters of high value businesses include:

- C1.1 (EM1): Kingsditch Industrial Estate – Includes a cluster of Advanced Manufacturing business in the north west including Spirax Sarco and Engineered Systems. This provides a modest cluster which the adjacent Policy A4: North West Cheltenham can build upon
- C1.2 (EM1): GCHQ Benhall – A focus for Digital and Technologies and Defence activities in Cheltenham. Proposals at Policy A7: West Cheltenham will develop to support and expand upon its operations
- C1.3 (EM1): Jessop Avenue, Cheltenham Town Centre – Key office cluster in central Cheltenham. Accommodate a diverse range of businesses in sectors including Professional and Business Services, Financial Services, Digital and Technologies as well as some healthcare businesses
- C1.16 (EM1, Site 7): Hatherley Lane (The Reddings) – Ultra PCS Electronics is an Advanced Manufacturing company, with links to Defence. Cheltenham Film Studios is a key local cluster of Creative Industries, unique in the SLP Area, which includes some Professional and Business Services and Financial Services companies.

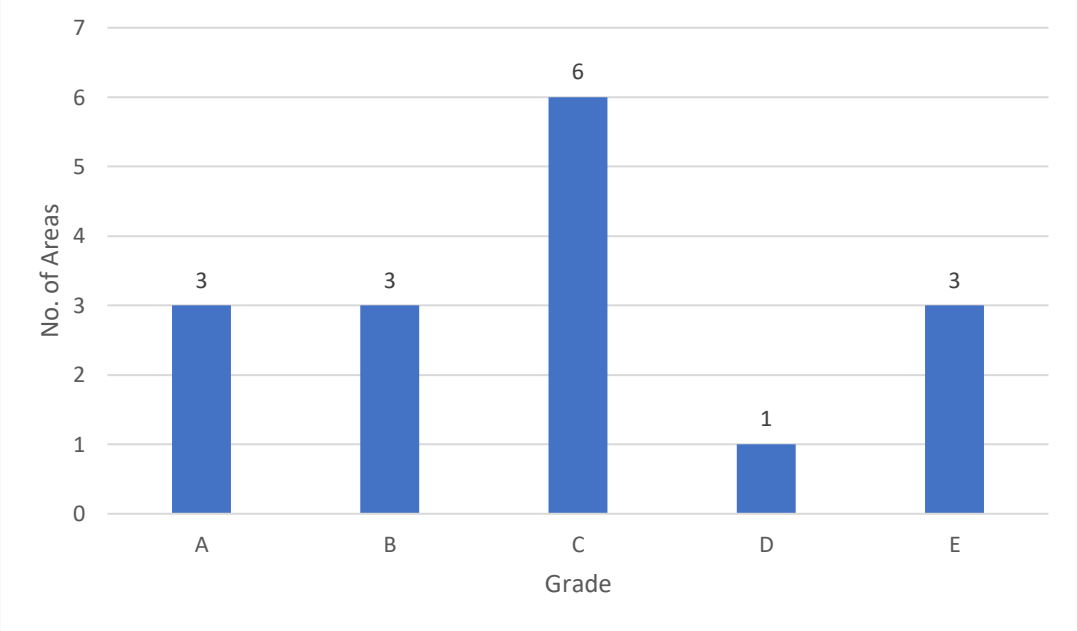
5.20 Within the areas, while there were many individual low grade premises, no location showed evidence of widespread dereliction across multiple premises while even old mills mostly remain in use. C1.10: Village Road, Cheltenham has been redeveloped for housing however and therefore should not be identified as an Employment Area anymore. Of the remaining 15 Areas, all but one was 90-100 percent occupied.

5.21 The high occupancy rates and lack of widespread dereliction suggest that Cheltenham

does not have significant problems with surplus premises. At C1.9: Lansdown Industrial Estate, including Alstone Lane Trading Estate, St George and Bramery Business Park and The Vineyards Industrial Estate, there are proposals for a partial redevelopment for housing, but this is alongside a programme of investment and industrial development in other parts of the estates.

5.22 As Figure 18 shows, 43.8 percent of the Areas (seven) were Graded C or D. This means they are active and successful employment locations, which should continue to be identified and protected for E(g)/B-Class uses in the SLP. It also means that while they may accommodate some large employers, the bulk of the stock, in terms of unit sizes, quality and location, primarily meets the needs local firms, frequently offering a mix of trade, industrial and warehouse units. Their economic influence is limited to within the boundaries of Cheltenham, and they are unlikely to attract the interest of inward investors unless that investor has a pre-existing need to locate to the town.

Figure 18 – Employment Areas by Grade



Source: BE Group, 2026

5.23 Three areas were graded B, meaning that they would compete well across the sub-regional market place of the SLP Area and Gloucestershire for investment. These are - C1.1 (EM1): Kingsditch Industrial Estate: C1.16 (EM1, Site 7): Hatherley Lane (The Reddings) and C1.11: Kohler Mira, Cromwell Road – and include Cheltenham's largest industrial estate (Kingsditch) and a high grade mixed area (Hatherley Lane).

5.24 Three areas were Graded A, meaning that their offer was of a strategic scale and could

compete with equivalent schemes across the South West (and West Midlands, South Wales). Unsurprisingly these include C1.2 (EM1): GCHQ Benhall, a facility of national importance, which will provide a base for further cluster growth. C1.3 (EM1): Jessop Avenue, Cheltenham Town Centre is Cheltenham's most significant cluster of high grade offices, in multiple occupation and C1.4 (EM1): UCAS Site, New Barn Lane, Cheltenham is another occupier of national import, albeit one less linked to wider employment clusters.

5.25 In addition to C1.10: Village Road, Cheltenham, C1.12: Dunkertons, Dowdeswell Park (formerly The Barlands), London Road and C1.15: Montis Court (formerly Premier Products), Bouncers Lane are graded E. The latter two are E graded because they are mostly in leisure/retail use so should not be highlighted at E(g)/B-Class uses in the SLP. None are graded E because of the quality of the built stock.

5.26 Regeneration opportunities, aside from plots already identified as employment sites in the previous section, are limited reflecting the dense urban position of most areas. Only, C1.5 (EM1): Tewkesbury Road - Neptune Business Centre / Cheltenham Trade Park / Space Business Centre, includes a small area with infill development potential – A car yard in the south, of 0.22 ha which could support a small infill development.

Summary

Employment Land Supply

5.27 Looking at JCS strategic allocations, allocations in the Cheltenham Plan (2020) and other unimplemented consents gives a gross baseline supply of 76.34 ha at six sites. Excluding sites unlikely to be developed for E(g)/B-Class uses; developments likely to result in a net loss of employment land and the netting of sites, gives a realistic employment land supply, for Cheltenham of 35.02 ha or 139,551 sqm in four sites.

5.28 The JCS Allocations in, or on the edge of, Cheltenham – North West and West Cheltenham – could provide a net supply of 33.64 ha or 134,031 sqm (96.1 percent of the land supply). In both cases schemes have at least Outline consent in place and some developer partners identified. West Cheltenham (Golden Valley) is most advanced, with Full planning consent secured for a three story Innovation Centre (The National Cyber Innovation Centre) of 15,245 sqm as an early phase of development. Contractors have been appointed on this project which is expected to commence in summer 2026. Discussions are underway with occupiers for this, and other properties here.

5.29 These sites are likely to be the focus of office development in the SLP Area, particularly at A7: West Cheltenham where proposals are for offices focused on Digital and Technologies (Cyber Security) and Defence, supporting nearby GCHQ. It is not possible to say exactly what proportion of this stock will be delivered for offices however, as larger strategic projects remain at an early stage and are expected to include industrial (esp. Advanced Manufacturing), warehouse, R&D and Data Centre uses as well.

Employment Areas Analysis

5.30 16 Employment Areas have been assessed and graded. 43.8 percent of the Areas (seven) were Graded C or D. This means they are active and successful employment locations, which should continue to be identified and protected for E(g)/B-Class uses in the SLP. It also means that while they may accommodate some large employers, the bulk of the stock, in terms of unit sizes, quality and location, primarily meets the needs local firms, frequently offering a mix of trade, industrial and warehouse units. Their economic influence is limited to within the boundaries of Cheltenham, and they are unlikely to attract the interest of inward investors unless that investor has a pre-existing need to locate to the town.

5.31 Three areas were graded B, meaning that they would compete well across the sub-regional market place of the SLP Area and Gloucestershire for investment. These are - C1.1 (EM1): Kingsditch Industrial Estate: C1.16 (EM1, Site 7): Hatherley Lane (The Reddings) and C1.11: Kohler Mira, Cromwell Road – and include Cheltenham's largest industrial estate (Kingsditch) and a high grade mixed area (Hatherley Lane).

5.32 Three areas were Graded A, meaning that their offer was of a strategic scale and could compete with equivalent schemes across the South West (and West Midlands, South Wales). Unsurprisingly these include C1.2 (EM1): GCHQ Benhall, a facility of national importance, which will provide a base for further cluster growth. C1.3 (EM1): Jessop Avenue, Cheltenham Town Centre is Cheltenham's most significant cluster of high grade offices, in multiple occupation and C1.4 (EM1): UCAS Site, New Barn Lane, Cheltenham is another occupier of national import, albeit one less linked to wider employment clusters.

5.33 In addition to C1.10: Village Road, Cheltenham, C1.12: Dunkertons, Dowdeswell Park (formerly The Barlands), London Road and C1.15: Montis Court (formerly Premier Products), Bouncers Lane are graded E. The latter two are E graded because they are

mostly in leisure/retail use so should not be highlighted at E(g)/B-Class uses in the SLP. None are graded E because of the quality of the built stock.

5.34 Most of the existing employment areas are well occupied, with no large areas of void premises, and of average quality. Areas are a mixture of industrial estates, particularly offering small/mid-sized industrial and storage units dominated by trade uses, urban offices and significant facilities for national employers, including GCHQ.

6.0 EMPLOYMENT LAND ASSESSMENT – GLOUCESTER

Introduction

6.1 This section looks at the portfolio of employment land, which was available, as of Spring 2026, to meet the employment land needs of Gloucester to 2046, as identified in the HENA (see Section 2.0). It also reviews 27 Employment Areas (industrial estates, business parks, etc.) which contain the bulk of the developed E(g)/B-Class premises in Gloucester, considering the scale and nature of the offer they present to the sub-regional market.

6.2 Gloucester needs a balanced portfolio of land to accommodate a sustainable, growing economy that can respond to dynamic market conditions, changing business needs and working practices.

Employment Land Assessment

Baseline Employment Land Supply

6.3 Only one JCS Strategic Allocation falls within Gloucester City boundary, 'Policy A4: Winnycroft' and no employment land is proposed here. Of the 18 Site Allocations within the Gloucester City Plan 2011–2031 (2023), four include proposals for E(g)/B-Class employment:

- SA07: Former Quayside House, Blackfriars (1.58 ha) – Consented for offices, GP Practice, pharmacy, residential (approximately 50 dwellings). One large office building has been delivered, Phase I: Quayside House, accommodating a number of medical facilities, pharmacy and four other mostly public sector occupiers. Phase II still to be delivered
- SA08: Former Fleece Hotel and Longsmith Street Car Park (0.46 ha, area identified as available in Gloucester City Council Non-Residential Monitoring Report 2023/24 and 2024/25) – Consented for main town centre uses, including offices, and residential (approximately 25 dwellings). Mixed use area in the city centre, which remains available for development
- SA14: Land South of Triangle Park (Southern Railway Triangle) (4.20 ha) – Consented for "Class E (g) (office, research and development, or any other industrial process that can be carried out in a residential area without detriment to amenity only) and/or B8 Class (storage and distribution) employment use." This site is used by Network Rail for operational purposes, but that use is

expected to cease during the Local Plan period with the land becoming available for development

- SA18: Part of West Quay, the Docks (0.70 ha) – Consented for main town centre uses, including offices, and residential (approximately 20 dwellings). The Alexandra Warehouse, within the allocation area is not available for redevelopment. Area of historic dockland buildings, available at this time.

6.4 A review of the Gloucester City Council Non-Residential Monitoring Report 2023/24 and 2024/25 does not identify any additional uncompleted planning consents for E(g)/B-Class uses which would provide more than 0.25 ha of employment land or 500 sqm of premises (the minimum for sites to be considered in Employment Land Assessments, as set out in Para 009 (Reference ID: 3-009-20190722) of Planning Practice Guidance Note 'Housing and Economic Land Availability Assessment').

6.5 Thus the local baseline supply of employment land in Gloucester is four sites providing 6.94 ha of employment land.

Employment Sites Analysis

6.6 Analysis of those four sites is considered in proformas at Appendix 7 and mapped in Appendix 8. Table 28 provides a summary of that assessment and indicates that the land has been developed for uses other than E(g)/B2/B8, is being held for transport infrastructure or is likely to be developed for other uses. Thus there is no land, already allocated in the Gloucester City Plan 2011–2031, which is readily available to meet E(g)/B-class needs. It should be noted however, that there are other regeneration opportunities within Gloucester's industrial estates and business parks which are discussed below. Additionally, there is identified employment land at Gloucester Business Park and around Gloucestershire Airport, which falls into Tewkesbury but is accessible to the city. This is considered in Section 7.0.

Table 28 – Summary of Employment Sites Assessment (Land Supply)

Site Reference	Site Name and Address	Baseline Employment Land Supply, ha	Comments	Conclusions/ Recommendations	Availability, Years	Realistic Employment Supply – Land, ha – Gross (Net*) Floorspace, Sqm**
SA07	Former Quayside House, Blackfriars	1.58	Gloucestershire County Council own The site was subject to a Reg 3 Major Application consent, by the County Council (App. No. 19/0045/GLR3MJ) The proposed development, now completed, was for one three-storey building of 5,330 sqm to comprise two general medical practitioner surgeries, associated pharmacy, 2,492 sqm of open plan office space and ground floor parking. Property is in use by mostly public sector businesses, with a focus on health services, it is part of the wider cluster of public sector uses in this area.	The consented property is complete with land to the north in full use as staff car parking for the building. There does not appear to be the prospect of further development here.	-	-
SA08	Former Fleece Hotel and Longsmith Street Car Park	0.46	Gloucester City Council own The 135 space Longsmith Street Car Park remains in operation; the Hotel is understood to be fully vacant. Allocated in an adopted Local Plan for "main town centre uses, including approximately 25 residential units." The site has been subject to multiple regeneration proposals since the Hotel closed in 2002. The most recent was the Phoenix Village Project which would have offered supported accommodation with skills training and assistance to people with health and mental health issues, alongside food, retail and leisure outlets. However, the £60 million project was reliant on Gloucestershire County Council placing young people here. Additionally, the initial £6.3 million of National Government funding for The	Regeneration opportunity site. What the land and buildings may be redeveloped for remains uncertain at this time. However, stakeholders suggest that leisure or residential uses are most likely, rather than E(g)/B-Class employment, reflecting the surrounding uses.	-	-

Site Reference	Site Name and Address	Baseline Employment Land Supply, ha	Comments	Conclusions/ Recommendations	Availability, Years	Realistic Employment Supply – Land, ha – Gross (Net*) Floorspace, Sqm**
			Fleece was reallocated to other projects in 2023. The proposed scheme was abandoned in September 2025. It is understood that the location will now be subject to multiple smaller scale regeneration projects but no details on these have been made public at the time of writing. Constraints • The Main Fleece Hotel is Grade 1 Listed • Urban site, tightly bound by other mostly retail and leisure uses			
SA14	Land South of Triangle Park (Southern Railway Triangle)	4.20	Network Rail own (A4302 embankment owned by Gloucestershire County Council) Allocated in an adopted Local Plan for "Class E (g) (office, research and development, or any other industrial process that can be carried out in a residential area without detriment to amenity only) and/or B8 Class (storage and distribution) employment use." Network Rail has indicated that it intends to retain this land for rail infrastructure use only. Constraints • Current access is via a narrow back road which passes between the A38 and to the rear of Triangle Park, underneath the A4302 Metz Way. It is assumed that to develop the site a more direct access will need to be provided off the A4302 Metz Way. This will have to address the level differences between the site and the carriageway • Trees on site • Possible site contamination from previous uses	To be retained by Network Rail for its own use. Thus assumed not available for E(g)/B-Class development.	-	-

Site Reference	Site Name and Address	Baseline Employment Land Supply, ha	Comments	Conclusions/ Recommendations	Availability, Years	Realistic Employment Supply – Land, ha – Gross (Net*) Floorspace, Sqm**
			• Parts of the site are at risk from surface water flooding.			
SA18	Part of West Quay, the Docks	0.70	Canal and River Trust own (Alexandra Warehouse is owned by The Corporation of Gloucestershire College). Site includes four brick warehouses. The southern two properties at least appear to be occupied by the Gloucestershire Brewery (Warehouse 4) and Furniture Recycling Project. Allocated in an adopted Local Plan for "Main town centre uses, including approximately 20 dwellings." The bulk of the site, west of Alexandria Warehouse, and excluding the Gloucestershire Brewery Building, is subject to an undecided planning application for 41 no. residential properties incorporating new commercial unit (E use class) of 160 sqm through the conversion of the existing warehouse building and construction of new apartment blocks (6 storeys) following the demolition of existing structures (App. No. 25/01157/FUL). The proposal would take up 0.39 ha of the 0.70 ha site. Constraints • The site falls into Flood Zone 2 • Parts of the site are at risk from surface water flooding • Located within The Docks Conservation Area • The Brewery Building (Fox's Malthouse) and the Alexandria Warehouse are Grade II Listed.	The bulk of the site is now proposed for housing, and while this current application may be refused, the emphasis of development is strongly residential, albeit with a single small commercial unit included. Of the outstanding 0.31 ha, not included in the application, the bulk of this is taken up by Gloucestershire Brewery which appears to be an active and successful brewery and leisure venue. Thus it is assumed that any E(g)/B-Class development which takes place here will be limited.	-	-
Total		**6.94**				**-**

Source: BE Group, GCC, Other Stakeholders, 2026

*The Net site size is either identified from planning consents, stakeholder engagement or, where these are not available, uses an 'efficiency ratio' of:

- Small Sites (<2ha): 85-90 percent efficiency
- Medium Sites (2-10ha): 75 – 85 percent efficiency
- Large Sites (10ha +): 60-75 percent efficiency.

This deducts land for:

- Strategic Green Infrastructure
- Sustainable Drainage Systems
- Transport Infrastructure – Major spine roads and dedicated corridors (not on-site parking and manoeuvring areas). It assumes a smaller site will use existing infrastructure surrounding, i.e. existing roads in an industrial estate, while a larger site will require more internal infrastructure, hence have a lower efficiency ratio
- Topographical constraints.

**Again floorspace uses either figures provided in planning consents, by stakeholders or, where these are not available uses a standard developer ratio of 4,000 sqm/hectare or 40 percent site coverage for buildings, with other land used for car parking, internal roads, greenspace, etc.

Employment Area Assessments

6.7 The Gloucester City Employment Land Review (2019) examined 76 Employment Areas (industrial estates, business parks, rural and urban businesses centres, urban office buildings, farm conversions to E(g)/B-Class uses and facilities for individual businesses) across Gloucester. However, consideration of the locations and discussions with the Council indicate that the 2019 Employment Land Review broke the areas down into excessively small units which did not reflect the broader industrial estates and business parks of the city. Accordingly, for this Study the 76 plots have been amalgamated into 27 larger Employment Areas, felt to be more logical sub-divisions of Gloucester's E(g)/B-Class stock.

6.8 It should be noted that Kingsholme Business Park, Area No. 034 in the Employment land Review is now primarily training facilities for Gloucester Rugby Club, it is not reviewed here. Additionally, the 2019 Employment Land Review reviewed the entirety of Gloucester Dock as a single area (Area No. 048). While the Dock does include some buildings in office use such as the North Warehouse and The Docks Office, the bulk of the area is mixed, with a focus on residential and retail/leisure. Accordingly the Docks area, as a whole is not reviewed.

6.9 Each remaining area has been appraised and assessed through a combination of site visits, existing Council data, local intelligence and the views of those involved in the property market in those areas.

6.10 Maps of the 27 areas are provided at Appendix 8, based on their Name.

6.11 Consistent with the approach used in Cheltenham and Tewkesbury, proformas have been created for each area (and are provided at Appendix 9), based on the following format, to simplify the data and make it easier to interpret:

- 'Name (address)' is the local authority's designated title for the area. Also identified here is the Employment Land Review (2019) sub-areas which fall within this larger location
- 'Reference' is the reference number for the area, as designated by this study, alongside the Employment Land Review (2019) sub-area reference numbers which fall within this larger location
- A brief 'Description' is provided in the form of BE Group's comment on the area

- 'Key Occupiers' identifies the most significant businesses operating within the area
- 'Dominant Uses/Business Sectors' provides a description of the main uses on the area, e.g. financial services, advanced manufacturing, general industry, engineering, motor trade, warehousing, etc. with reference to the nine Key Sectors identified and discussed in Sections 2.0 and 3.0
- 'Links to Key Economic Clusters' considers what wider business clusters does the area relate to now and what clusters might it contribute further to in the future
- A current occupancy rate is provided as a percentage of the total number of units in the area
- The size of the area, in hectares, is provided based on data provided by the local authority.
- 'Building Age' considers the average age of the majority of properties in the area with the age categories used being – Pre-1945, 1945-1990, 1990-2010, 2010+ (modern)
- 'Building Quality' takes a subjective view on the quality of premises in each area and considers whether the bulk of the units can be classified as Derelict, Poor, Average or Good
- 'Area Constraints' are identified, which could include the proximity to planning designations such as Conservation Areas and Listed Buildings, flood risk, the proximity of overhead pylons and other physical issues.
- In 'Opportunities for redevelopment/ expansion', vacant land is identified, as is the scope for redevelopment of particular vacant/derelict properties or sites. Greenfield expansion possibilities are also included, showing opportunities for the growth and intensification of the E(g)/B-Class uses here.
- 'Recommendations' are provided on the main issues of the Area, its future prospects for supporting growth and whether it should be protected for E(g)/B-Class uses in the SLP. Any required adjustments to Area boundaries, for future Plan mapping are also set out.
- Finally, 'Grade' refers to BE Group's professional opinion on the ranking that should be afforded to the individual area. This has been based on a consideration of the above data and BE Group's professional opinion on each area, reflecting site visits and relevant stakeholder comments. Combining this

data leads to an overall hierarchical assessment banded A to E. These are described in Table 29.

Table 29 – Grades A to E Definitions

Grade	Definition	Action
A	High quality, prestigious, flagship business areas due to their scale, location and setting. Capable of competing for investment in the regional market place. These are prime sites for marketing to a cross section of users including new inward investors. They can also meet the needs of image-conscious, aspirational companies already in the local authority area	Protect strongly in the SLP Support and expand
B	Good employment sites due to their scale, location and setting. Capable of competing for investment in the sub-regional market place. These are prime sites for marketing to a cross section of users, E(g), B2 and B8, including some new inward investors.	Protect strongly in the SLP Support and expand
C	Key employment sites with an influence over the whole local authority area but primarily geared towards local businesses and E(g)(iii) light industrial, B2 and B8 uses.	Protect in the SLP Support
D	Lower quality locations in residential or rural areas suffering from poor accessibility and massing.	Continue to protect/review through the SLP
E	Very poor quality areas. Widespread vacancy and dereliction in poor environments. Or areas which have been, or are in the process of being, lost to other uses.	Promote alternative uses if possible

Source: BE Group 2026

6.12 Table 30 summarises the findings on each Employment Area.

Table 30 – Assessment of Existing Employment Areas (Existing Premises)

Area Reference: Name	Area, ha	Employment Area Description	Summary of Major Occupiers, Key Sectors and Clusters (Occupancy Rate)	Area Constraints	Opportunities for redevelopment/ expansion	Recommendations	Site Grading
G1.1: Madleaze Industrial Estate	29.93	Large, linear Employment Area running primarily along the western side of Bristol Road and comprising a range of older industrial premises, many sub-divided to accommodate local firms.	JGB Engineering, Diamorph, Lillieshall Steel Services, Nicks Timber. Mostly comprises local firms in trade and engineering use but does include facilities for Diamorph which engages in Advanced Manufacturing of materials for sectors like energy, aerospace and defence. (93)	• The north and west of the Area is in Flood Zones 2/3 • Includes areas of land subject to surface water flooding • Housing along the Bristol Road frontage.	Densely developed area, all land and property appears well used.	Large, active urban Employment Area. It should be protected for E(g)/B-Class uses in the SLP.	C
G1.2: Bristol Road / Canal Corridor	39.56	Large urban industrial area, providing a diverse range of older, average quality industrial and warehouse stock, along the Bristol Road Corridor extending south to the A430 Junction.	SYNETIQ Gloucester, Gloucester Volvo Specialists, AMS Auctions - Gloucester Auction Centre, Enterprise Flex-E-Rent, Wales and West Utilities, Gloucester Powder Coating. Trade/Motor Trade and repair, utilities, engineering and light fabrication. Limited links to Key Sectors. (86)	• A small area in the South West is in Flood Zones 2/3 • Includes areas of land subject to surface water flooding • Housing adjacent.	There is a large area of land (5.44 ha) fronting, and to the South/South West of the Wales and West Utilities site (north of Ford Bristol Street Motors) which appears vacant or is only used for open storage and vehicle parking. This area provides a redevelopment opportunity although is in multiple ownership and appears to include the remains of gas storage infrastructure, so will likely include contaminated land.	Large, diverse industrial area. While dominated by trade uses it still contains a range of average and budget quality industrial and storage uses which are meeting local business needs. The Area has also seen some recent developments of new industrial units around Lower Tuffley Lane. It should be protected for E(g)/B-Class uses in the SLP.	C
G1.3: Hempstead / Llanthony Road	25.78	Mixed Employment Area comprising an area of low density, large industrial/warehouse properties north west of Hempstead/Llanthony Road and group of smaller industrial and storage units to the south east, extending into Gloucester Dock and including some historic dock properties.	Gloucestershire College, C and S Security, Motus Commercials Gloucester, Ford Fuels. Motor Trade/Motor Repair, mixed leisure, security, boat maintenance. Limited links to Key Sectors. (85)	• Area is in Flood Zones 2/3 • Includes areas of land subject to surface water flooding • Some housing included in the Area • Partially in a Conservation Area • Includes some Listed Buildings.	There are large areas of underused land in the north western area, including 2.58 ha north of the Gloucester City Football Ground (owned by Arriva) and 4.86 ha at the western end of Spinnaker Road (Multiple Ownerships). These could allow some brownfield expansion of the Area.	Active, mixed local Employment Area. It should be protected for E(g)/B-Class uses in the SLP.	C
G1.4: Eastern Avenue	41.37	A range of industrial estates, offering mostly small and mid-sized units of average quality, plus a larger Royal Mail facility, located along A38 Eastern Avenue, with a focus on trade occupiers.	Royal Mail, Screwfix, Darchem Engineering. Logistics, Trade, mixed engineering and light fabrication. Limited links to Key Sectors. (92)	• Land in the North is in Flood Zones 2/3 • Includes areas of land subject to surface water flooding.	The vacant 4.72 ha site at the junction of Metz Way and Eastern Avenue is under development for a Costco.	A group of active local industrial estates, accommodating a range of local businesses, albeit dominated by trade uses. It should be protected for E(g)/B-Class uses in the SLP.	C

Area Reference: Name	Area, ha	Employment Area Description	Summary of Major Occupiers, Key Sectors and Clusters (Occupancy Rate)	Area Constraints	Opportunities for redevelopment/ expansion	Recommendations	Site Grading
G1.5: Barnwood	35.02	Mixed business park accommodating a range of larger, regional/national businesses in offices, data centres and warehouses, with smaller properties in the west. It is located in a prominent position off the A417 route into Gloucester.	CCS, TSB, Barclays (Data Centre), Indectron Colocation Data Centre, Booker Wholesale. Logistics, wholesale, financial/legal, healthcare. Includes a cooperate office for TSB and a data centre for Barclays, some of the largest such facilities in the city, plus several smaller Financial Services Businesses. There are two data centres in the area, key facilities for the Digital and Technologies Sector. (92)	• Includes areas of land subject to surface water flooding • Housing adjacent.	The 10.31 ha EDF Energy site in the south has been vacant since 2022. It is now subject to an undecided Outline planning application for up to 281 new homes and up to 8,000 sqm of mixed new employment floorspace (App. No. 26/00316/OUT).	Active mixed Employment Area accommodating a number of national occupiers and two large data centres, with at least some prospect for new development, albeit part of a mixed-use redevelopment of a larger site. It should be protected for E(g)/B-Class uses in the SLP. If the mixed use scheme on the EDF site is approved, housing elements will need to be excluded from the Area boundary.	A
G1.6: Unilever/Corinium Avenue	28.65	Multiple large modern factory complexes and logistics units, plus smaller trade properties, on a linear Employment Area located north of Corinium Avenue and west of the A417 on the edge of the Gloucester settlement area. Also includes a multi-let office building, Corinium House.	Unilever, Lineage, Amazon, Kohler Mira. Logistics , food production, trade, manufacturing of household goods, professional services, financial and legal services. Corinium House includes a mix of Professional and Business Services and Financial Services. (98)	• Includes areas of land subject to surface water flooding.	Last remaining undeveloped plot, in the north east has now been developed, primarily for an Amazon depot. Further growth is prevented by the adjacent railway line and surrounding strategic roads.	Includes a group of strategic scale industrial and warehouse units, accommodating several regional/national scale businesses. It should be protected for E(g)/B-Class uses in the SLP.	A
G1.7: Southgate House	1.07	Large brick built, good quality, four storey multi-occupancy office building, well located off Southgate Street and linking to Gloucester Docks. The space has been recently refurbished to provide offices of 100-4,000 sqm. Also includes one floor of smaller serviced offices – Fig Gloucester.	Pro Insurance Solutions, Thistle Insurance Services, NextGen Utilities AA Certification, Gazella, Multilink Care Management. Professional services, insurance, and utilities companies. Accommodates a range of office based businesses including a cluster of smaller Financial Services firms. (Approx. 50)	• In a Conservation Area • Trees onsite • Housing adjacent.	Site is fully developed and the building has been recently refurbished.	A useful source of smaller, modern offices in central Gloucester. It should be protected for E(g)/B-Class uses in the SLP.	B
G1.8: Beaufort House	0.82	Large vacant older four storey office building, which links to a row of Listed terraced buildings which are also in office use on Spa Road and a modern office, Montpellier House, on Montpellier Road. It is in an edge of centre location close to Gloucester Park.	Gloucester Charities Trust, Montrose Conveyancing. Charity, Financial Services. Main building is now empty, but some peripheral properties accommodate Financial Services firms. (20)	• Site is in Flood Zones 2/3 • Includes Listed Buildings • In a Conservation Area.	Beaufort House now has Prior Approval for the change of use from offices to 66 self-contained flats (App. No. 26/00237/PRIOR).	The main building now has Prior Approval for a change of use to flats. While some small peripheral offices remain this is no longer a defined Employment Area and does not need to be directly identified and protected as such in the SLP.	E
G1.9: Twyver House	1.30	Large older, five storey office building , occupied by HM Land Registry and benefitting from some recent refurbishment. On the A430 Burton Way across from Gloucester Rail Station.	HM Land Registry Public Administration. Limited links to Key Sectors (100)	• Trees onsite	Building has a large car park, but this appears well used.	Large, centrally located public sector office. It should be protected for E(g)/B-Class uses in the SLP.	B

Area Reference: Name	Area, ha	Employment Area Description	Summary of Major Occupiers, Key Sectors and Clusters (Occupancy Rate)	Area Constraints	Opportunities for redevelopment/ expansion	Recommendations	Site Grading
G1.10: Shire Hall	1.78	Shire Hall is a large three wing 5/6 storey municipal office building located in the heart of the City Centre, which has seen recent refurbishment. It includes offices for the City Council, County Council and Police.	Gloucester City Council, Gloucestershire County Council, Gloucestershire Constabulary. Public Administration. Limited links to Key Sectors. (100)	• Listed Buildings on site and adjacent • In Conservation Area • Some land in south west is in Flood Zones 2/3 • Includes areas of land subject to surface water flooding • Trees onsite.	Fully developed and in a dense urban area.	Key public sector administrative facilities. It should be protected for E(g)/B-Class uses in the SLP.	B
G1.11: Pullman Place/Pullman Court	4.74	Mixed urban employment area, including Pullman Place a large modern, four storey office in healthcare uses; Pullman Court a terraced square of multi-storey offices and a large warehouse to the rear.	NHS, Redkite Solicitors, Bspoke Lifestyle, Palm Flow Pilates Studio. Healthcare, Financial and Legal Services. Pullman Court includes a cluster of smaller Financial Services businesses. (100)	• Includes areas of land subject to surface water flooding • Trees onsite.	Area is fully developed. Adjacent undeveloped land is in use for rail infrastructure.	Small group of modern offices, accommodating an active cluster of Financial Services businesses, in a central location in Gloucester. It should be protected for E(g)/B-Class uses in the SLP.	C
G1.12: No 1 Business Centre	0.15	Brick built converted factory now accommodating a business centre providing serviced office rentals, virtual office services, registered business addresses, and meeting room facilities in an edge of centre location off the B4063 London Road.	The Good Surveyor, Laurine.co.uk, SPE Consultants, Go Gloucestershire Communications, Orbexia, AK Logistic Services, Trakasolutions. Mixed professional services, photography, financial and legal services, digital and telecommunications. Accommodates a diverse group of micro businesses, with a focus on Professional and Business Services. (Not Known)	• In a Conservation Area • Housing adjacent.	Site is in full use and tightly bound by other uses.	Key source of serviced start-up and micro business accommodation in Gloucester. It should be protected for E(g)/B-Class uses in the SLP.	D
G1.13: Conway House	0.09	Four storey average quality brick built office building on a retail street in central Gloucester. It is now a multi-let serviced business centre, managed by Regus and has been refurbished internally.	Regus (Other occupiers not known). (Not Known)	• In a Conservation Area • Partly in Flood Zone 2 • Housing adjacent.	The building has Prior Approval for conversion to 17, 1-3 bed flats (App. No. 23/00858/JPA).	Building appears to be in active use as a business centre, at present, but does have Prior Approval to be converted for housing making its future operation uncertain. It should not therefore be protected for E(g)/B-class uses in the SLP.	E
G1.14: Railway House, Bruton Way	0.20	Modern, two storey multi-let office building, prominently located off the A430 Bruton Way close to Gloucester Rail Station. Converted from a retail warehouse.	Kip McGrath Education Centre, Gloucester City Homes, Gloucestershire Community Rail Partnership, Inclusion Gloucestershire. Education, housing, community and voluntary sector. Limited links to Key Sectors. (100)	-	Fully developed and tightly bound by other uses.	Modern office building, in active use. It should be protected for E(g)/B-Class uses in the SLP.	C

Area Reference: Name	Area, ha	Employment Area Description	Summary of Major Occupiers, Key Sectors and Clusters (Occupancy Rate)	Area Constraints	Opportunities for redevelopment/ expansion	Recommendations	Site Grading
G1.15: Waterwells Business Park	38.80	Modern, good quality business park including a number of modern offices in the south and west, including large HQ facilities for Gloucestershire Police, and mid-sized industrial units in the north and east, prominently located off the main A38 route into Gloucester.	OPCC/Gloucestershire Constabulary, Stewart Golf, Probo Medical, Alston, Direct Online Services, Acorn Thorn, Eclipse Furniture, Higgs and Higgs, Secure Systems and Technologies, SN Engineering, Prima Dental, Rochling, FLI Structures, Decibel Fire and Security. Public Administration, hospitality, medical manufacturing, technology and security services, construction. Includes a range of high value uses, in modern accommodation which link to Key Sectors including Advanced Manufacturing (medical and security systems). In the offices, other than the Police, the focus is on Professional and Business Services. (89)	• Housing adjacent • Includes area of land subject to surface water flooding • Trees onsite.	Includes 1.12 ha of undeveloped land in the north, at the junction of Telford Way and Edison Close. This land is owned by the Police and Crime Commissioner for Gloucestershire, however, and is assumed to be held for the future expansion of the Police HQ.	Modern, good quality mixed employment area including some high value occupiers. It should be protected for E(g)/B-Class uses in the SLP.	B
G1.16: Quedgeley	27.01	Mid-sized modern industrial estate, running west of the A38, in the south west of the city, accommodating a range of larger B2/B8 occupiers east of Olympus Park Road and smaller occupiers to the west.	Royal Mail, Yodel, Geotechnical Engineering, ARRK, Severn, Gloucestershire's Machining Centre, Tech Sofa. Logistics, Engineering, Mixed Manufacturing, Food Production, Trade. Mixed area overall but includes a group of larger industrial units which accommodate Advanced Manufacturing Businesses, alongside logistics operators. Also includes several multi-occupancy offices which support Professional and Business Services. (91)	• Housing adjacent • Includes area of land subject to surface water flooding • Trees onsite.	Area is fully developed and bound by other uses.	Mixed area but including some larger B2/B8 units, accommodating regional/national scale businesses and high value occupiers. It should be protected for E(g)/B-Class uses in the SLP.	B
G1.17: Lower Tufley	12.82	Older industrial area characterised by mid-sized units, with some modern infill development along Lower Tuffley Lane. Located to the east of Bristol Road and surrounded by similar industrial uses to the north and west, it is dominated by trade ad logistics uses. Residential development located further to the east.	XPO Logistics, The Bathroom Showroom, Baylis, Warkins and Powis. Motor Trade/Trade, Logistics. Limited links to Key Sectors. (90)	• Housing adjacent • Includes area of land subject to surface water flooding • Trees onsite.	Area, including land along Lower Tuffley Lane, is fully developed.	Active local employment area, although dominated by trade uses it still provides a useful source of mid-sized properties at the A3/A430 Junction. It should be protected for E(g)/B-Class uses in the SLP.	C
G1.18: Cole Avenue (South of A38, East of A3)	6.34	Group of average quality, mid-sized industrial and warehouse units, dominated by trade uses and located at a main road junction on the edge of the Lower Tuffley neighbourhood.	Baylis Chevrolet Service, Johnsons Mazda Gloucester, MBC Timber, Euro Car Parts. Trade, Motor Trade/Repair, manufacture of wooden buildings. Limited links to Key Sectors. (100)	• East of the Area is in Flood Zones 2/3 • Housing adjacent • Includes area of land subject to surface water flooding • Trees onsite.	Area is fully developed and tightly bound by other uses.	Active local employment area, dominated by trade uses but including some manufacturing businesses. It should be protected for E(g)/B-Class uses in the SLP.	C

Area Reference: Name	Area, ha	Employment Area Description	Summary of Major Occupiers, Key Sectors and Clusters (Occupancy Rate)	Area Constraints	Opportunities for redevelopment/ expansion	Recommendations	Site Grading
G1.19: St James Trading Estate	1.37	Two average quality local industrial estates, located east and west of the B4073 Barton Street, in a mostly residential area and offering mostly smaller units.	SOH Fit, Beauty Within, Dragon Martial Arts, Gloucester Taxi, Pampered Paws, Redd Tech Repair, Universal Care Agency, John's Privat Hire Cars and Taxis, The Gloucester Biltong Company. Health and fitness, trade/wholesale, mixed services. Limited links to Key Sectors. (90)	• Includes areas of land at risk from surface water flooding • Housing adjacent.	The Area is fully developed and tightly bound by other uses.	Two small industrial estates, dominated by trade uses but providing a key local source of smaller units which could meet a range of local needs. It should be protected for E(g)/B-Class uses in the SLP.	C
G1.20: Goodrich Trading Estate	2.64	Mixed group of light industrial, storage and single storey office units, of average quality in an edge of settlement location off the A430.	Hydrolich Hose and Fluid, Roofbase Gloucester, Hanman, Speedy Services, Brunsdon, Mercury Glazing Supplies. Trade, Construction. Limited links to Key Sectors. (100)	• North East of the site is in Flood Zones 2/3 • Includes areas of land at risk from surface water flooding • Housing adjacent.	Site is fully developed and tightly bound by other uses.	Local, average quality industrial estate but appears well used and has good access. It should be protected for E(g)/B-Class uses in the SLP. There are two offices south of KFC which could also be included in the area boundary.	C
G1.21: Allstones, Myers Road	2.20	Large industrial unit surrounded by large areas of open storage for aggregates and waste.	Allstone. Aggregates, Waste (Skip hire). Limited links to Key Sectors. (100)	• Includes areas of land at risk from surface water flooding • Housing adjacent.	There is an aspiration for housing here. An EIA Screening Opinion Request for residential redevelopment of site for up to 200 dwellings and up to 200 units of key worker/student accommodation plus associated open space and access, was registered in 2023 (App. No. 23/00727/EIA).	Site represents a long term regeneration opportunity but at present is in use accommodating bad neighbour uses which could struggle to find accommodation elsewhere. It should be protected for E(g)/B-Class uses in the SLP, but not to the exclusion of redevelopment opportunities which might deliver superior economic value.	D
G1.22: Glevum Works	0.89	Small, average quality industrial estate, to the rear of housing and accessed via narrow residential roads.	Discount Tyres, Express Removals and storage, Herbert Davis Removals. Logistics, Motor Repair, Construction. Limited links to Key Sectors. (100)	• Includes areas of land at risk from surface water flooding • Housing adjacent • Constrained access.	Area is in full use and tightly bound by other uses.	Small, constrained but active local industrial estate. It should be protected for E(g)/B-Class uses in the SLP.	D
G1.23: Sudbrooke Trading Estate	0.55	Small infill site, to the rear of housing, and in use as a yard for a building supply company plus some prefabricated structures.	Morgan Supplies Trade. Limited links to Key Sectors. (100)	• In Flood Zones 2/3 • Includes areas of land at risk from surface water flooding • Housing adjacent.	In the long term the whole of this low density site may represent a redevelopment opportunity. In the short term the yard appears in full use.	Site represents a long term regeneration opportunity but at present is in use. It should be protected for E(g)/B-Class uses in the SLP, but not to the exclusion of redevelopment opportunities which might deliver superior economic value.	D
G1.24: Sisson Road	2.41	Several brick built older factory buildings, and more recent extensions at the edge of a residential area.	Helipebs Controls, GR Lane Health Products. Hydraulic Equipment supply, pharmaceuticals production. Includes one business in the Life Sciences sector. (100)	• Includes areas of land at risk from surface water flooding • Housing adjacent.	Site is in full use. Surrounding undeveloped land is in use as playing fields.	Small but active employment area accommodating two larger employers. It should be protected for E(g)/B-Class uses in the SLP.	C

Area Reference: Name	Area, ha	Employment Area Description	Summary of Major Occupiers, Key Sectors and Clusters (Occupancy Rate)	Area Constraints	Opportunities for redevelopment/ expansion	Recommendations	Site Grading
G1.25: Hempstead Gloucester BT	2.74	A low-density employment site comprising open hardstanding and open storage yards along with two warehouse buildings, prominently located off the A430 and adjacent to the Gloucester and Sharpness Canal.	BT Fleet Workshops, Neil Ogden Commercials. Motor Repair. Indirectly supports the Digital and Technology sector through fleet management for BT. (100)	• In Flood Zones 2/3 • Includes areas of land at risk from surface water flooding • Housing adjacent.	In the long term the whole of this low density site may represent a redevelopment opportunity, capitalising on its attractive canal side location and good strategic road access. In the short term the depot appears in full use.	Site represents a long term regeneration opportunity but at present appears well used. It should be protected for E(g)/B-Class uses in the SLP, but not to the exclusion of redevelopment opportunities which might deliver superior economic value.	D
G1.26: Westgate Business Park	1.91	Small group of average quality industrial and warehouse units, prominently position on the A417 route into the city.	Steer, Ineos, Malvern Tyres. Trade/Motor Trade and repair. Limited links to Key Sectors. (100)	• In Flood Zones 2/3 • Includes areas of land at risk from surface water flooding.	All land in use and bound by main roads and the River Severn.	Small area, dominated by trade uses and of modest overall value, but still in use accommodating a range of local firms. It should be protected for E(g)/B-Class uses in the SLP, but not to the exclusion of redevelopment opportunities which might deliver superior economic value.	D
G1.27: Allcooper (76 Kingsholm Road)	0.36	Single storey good quality, multi-let office building on a main road position off the A430 Kingsholm Road in a mostly residential area.	Securitas, TMS, Cordial, Community Foster Care. Private security, media, social welfare/community care. Includes one business in Creative Industries. (100)	• Housing adjacent	Building was refurbished to office uses in 2023 and remains in full use.	Active, multi-let office building. It should be protected for E(g)/B-Class uses in the SLP.	C
Total	**310.50**						

Source: BE Group, 2026

6.13 Together these 27 Employment Areas comprise 310.50 ha of primarily developed employment land. Where possible, all non E(g)/B-Class uses have been removed from the area boundaries. Where issues remain, these are highlighted in area recommendations.

6.14 G1.4: Eastern Avenue is the largest area at 41.37 ha, followed by G1.2: Bristol Road / Canal Corridor at 39.56 ha. Overall, there are eight large business parks, occupying more than 20 ha each, focused in the east and west of the city, focused on the A38 and A417 Corridors.

6.15 Many areas include businesses which can be described as falling into one of the Key Sectors, however, areas which include more defined clusters of high value businesses include:

- G1.5: Barnwood – Includes a cooperate office for TSB and a data centre for Barclays, some of the largest such facilities in the city, plus several smaller Financial Services Businesses. There are two data centres in the area, key facilities for the Digital and Technologies Sector
- G1.7: Southgate House – Accommodates a range of office based businesses including a cluster of smaller Financial Services firms
- G1.11: Pullman Place/Pullman Court – Pullman Court includes a cluster of smaller Financial Services businesses
- G1.15: Waterwells Business Park – Includes a range of high value uses, in modern accommodation which link to Key Sectors including Advanced Manufacturing (medical and security systems). In the offices, other than the Police, the focus is on Professional and Business Services
- G1.16: Quedgeley – Mixed area overall but includes a group of larger industrial units which accommodate Advanced Manufacturing businesses, alongside logistics operators. Also includes several multi-occupancy offices which support Professional and Business Services.

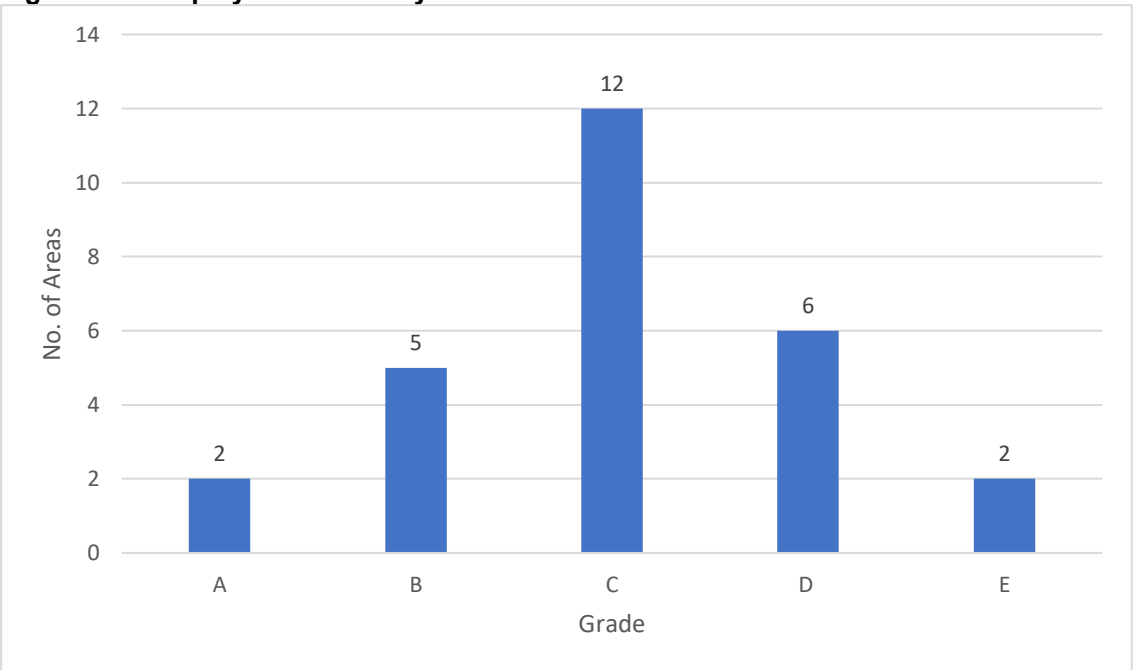
6.16 Within the areas, while there were many individual low grade premises, no location showed evidence of widespread dereliction across multiple premises while even old mills mostly remain in use. 20 of 27 areas (74.1 percent) are over 90 percent occupied.

6.17 The high occupancy rates and lack of widespread dereliction suggest that Gloucester does not have significant problems with surplus premises. Two solus office buildings

have Prior Approval for housing, with interest in such a conversion for a third area. Conversely, other buildings such as G1.7: Southgate House show evidence of recent investment and refurbishment.

6.18 As Figure 19 shows, two thirds of the areas (18) were Graded C or D. This means they are active and successful employment locations, which should continue to be identified and protected for E(g)/B-Class uses in the SLP It also means that while they may accommodate some large employers, the bulk of the stock, in terms of unit sizes, quality and location, primarily meets the needs local firms, frequently offering a mix of trade, industrial and warehouse units. Their economic influence is limited to within the boundaries of Gloucester, and they are unlikely to attract the interest of inward investors unless that investor has a pre-existing need to locate to the city.

Figure 19 – Employment Areas by Grade



Source: BE Group, 2026

6.19 Five areas were graded B, meaning that they would compete well across the sub-regional market place of the SLP Area and Gloucestershire for investment. Alongside several good quality, multi let office buildings, these include G1.15: Waterwells Business Park and G1.16: Quedgeley, two high grade business parks located on the A38 Corridor in the west of the city. Two areas were Graded A, meaning that their offer was of a strategic scale and could compete with equivalent schemes across the South West (and West Midlands, South Wales). These are G1.5: Barnwood and G1.6: Unilever/Corinium Avenue. Located on the A417, in the east of the city, these are a focus for national

employers in the city including TSB and Unilever as well as accommodating two large data centres.

6.20 G1.8: Beaufort House and G1.13: Conway House are graded E. These office properties have Prior Approval for housing, so it is assumed that they will be lost to the employment land supply in the short term. None are graded E because of the quality of the built stock.

6.21 Regeneration opportunities, aside from plots already identified as employment sites in the previous section, are limited reflecting the dense urban position of most areas. However, there are some large areas of underused or vacant land which could support brownfield development and growth in the city, especially reflecting the lack of allocated employment land in the city boundary:

- G1.2: Bristol Road / Canal Corridor – There is a large area of land (5.44 ha) fronting, and to the South/South West of the Wales and West Utilities site (north of Ford Bristol Street Motors) which appears vacant or is only used for open storage and vehicle parking. This area provides a redevelopment opportunity although is in multiple ownership and appears to include the remains of gas storage infrastructure, so will likely include contaminated land
- G1.3: Hempstead / Llanthony Road – There are large areas of underused land in the north western area, including 2.58 ha north of the Gloucester City Football Ground (owned by Arriva) and 4.86 ha at the western end of Spinnaker Road (Multiple Ownerships). These could allow some brownfield expansion of the area
- G1.5: Barnwood – The 10.31 ha EDF Energy site in the south has been vacant since 2022. It is now subject to an undecided Outline planning application for up to 281 new homes and up to 8,000 sqm of mixed new employment floorspace (App. No. 26/00316/OUT)
- G1.15: Waterwells Business Park – Includes 1.12 ha of undeveloped land in the north, at the junction of Telford Way and Edison Close. This land is owned by the Police and Crime Commissioner for Gloucestershire, however, and is assumed to be held for the future expansion of the Police HQ.

Summary

Employment Land Supply

6.22 Only one JCS Strategic Allocation falls within Gloucester City boundary, 'Policy A4: Winnycroft' and no employment land is proposed here. Of the 18 Site Allocations within the Gloucester City Plan 2011–2031 (2023), four, totalling 6.94 ha, include proposals for

E(g)/B-Class employment, usually as part of a mix of uses. However, these four sites have been developed for uses other that E(g)/B2/B8, are being held for transport infrastructure or are likely to be developed for other uses. Thus there is no land, already allocated in the Gloucester City Plan 2011–2031, which is readily available to meet E(g)/B-class needs.

Employment Areas Analysis

6.23 27 Employment Areas have been assessed and graded. Two thirds of these areas (18) were Graded C or D. This means they are active and successful employment locations, which should continue to be identified and protected for E(g)/B-Class uses in the Local Plan. It also means that while they may accommodate some large employers, the bulk of the stock, in terms of unit sizes, quality and location, primarily meets the needs local firms, frequently offering a mix of trade, industrial and warehouse units. Their economic influence is limited to within the boundaries of Gloucester, and they are unlikely to attract the interest of inward investors unless that investor has a pre-existing need to locate to the city.

6.24 Five areas were graded B, meaning that they would compete well across the sub-regional market place of the SLP Area and Gloucestershire for investment. Alongside several good quality, multi let office buildings, these include G1.15: Waterwells Business Park and G1.16: Quedgeley, two high grade business parks located on the A38 Corridor in the west of the city. Two areas were Graded A, meaning that their offer was of a strategic scale and could compete with equivalent schemes across the South West (and West Midlands, South Wales). These are G1.5: Barnwood and G1.6: Unilever/Corinium Avenue. Located on the A417, in the east of the city, these are a focus for national employers in the city including TSB and Unilever as well as accommodating two large data centres.

6.25 G1.8: Beaufort House and G1.13: Conway House are graded E. These office properties have Prior Approval for housing, so its assumed that they will be lost to the employment land supply in the short term. None are graded E because of the quality of the built stock.

6.26 Most of the existing employment areas are well occupied, with no large areas of void premises, and of average quality but do offer a modest number of opportunities for infill or redevelopment within larger industrial estates and business parks. Areas are a mixture of industrial estates, particularly offering small/mid-sized industrial and storage units dominated by trade uses, and a range of multi-let office properties.

7.0 EMPLOYMENT LAND ASSESSMENT – TEWKESBURY

Introduction

7.1 This section looks at the portfolio of employment land, which was available, as of Spring 2026, to meet the employment land needs of Tewkesbury to 2046, as identified in the HENA (see Section 2.0). It also reviews 24 Employment Areas (industrial estates, business parks, etc.) which contain the bulk of the developed E(g)/B-Class premises in Tewkesbury, considering the scale and nature of the offer they present to the sub-regional market.

7.2 Tewkesbury needs a balanced portfolio of land to accommodate a sustainable, growing economy that can respond to dynamic market conditions, changing business needs and working practices.

Employment Land Assessment

Baseline Employment Land Supply

7.3 There are three JCS Strategic Allocations, which include employment land provision within Tewkesbury:

- Policy A1: Innsworth and Twigworth – 9.1 ha of employment land
- Policy A2: South Churchdown – Up to 17.4 ha of employment land
- Policy A3: North Brockworth – 3.3 ha of employment land.

7.4 It should be noted that the 14.3 ha of employment land allocated under Policy A5: Ashchurch has now been developed as Cotswold Retail Park.

7.5 'Policy EMP1 Major Employment Sites' of the Tewkesbury Borough Plan 2011 – 2031 (2022) identifies multiple expansion sites to the major Employment Areas:

- Malvern View Business Park, Bishops Cleeve – Extension allocated on adjacent land now developed for multiple uses including industrial units and a David Lloyd Fitness Club
- Ashville Business Park, Churchdown/Staverton – An eastern extension. The bulk of the site appears developed for a Jaguar Landrover dealership and a large office for Spectrum Medical. There remains one undeveloped plot of 0.61 ha in the north
- Bamfurlong Industrial Park, Churchdown/Staverton. An extension of 5.90 ha of adjacent land remains undeveloped and available.

7.6 'Policy EMP2 Rural Business Centres' of the Tewkesbury Borough Plan 2011 – 2031 (2022) identifies multiple expansion sites to the rural Employment Areas:

- Homelands Farm, Bishops Cleeve – A 1.68 ha extension, undeveloped at this time
- Highfield Farm, Elmstone Hardwicke – A 3.30 ha extension. The land has a hybrid consent for full planning permission for the erection of a B2 unit and outline permission for a mix of E(g), B2 and B8 uses (App. No. 22/00864/FUL) but this does not appear to have been implemented.
- Park Farm Industrial Estate, Gretton – A 1.35 ha extension which has consent for three workshop units (App. No. 23/01128/FUL). This appears to have been partly implemented.
- Highnam Business Centre, Highnam – The Land has consent for the erection of up to 95 dwellings and up to 3.0 ha of commercial space (App. No. 21/01392/OUT). The employment element has not yet commenced.
- Brockeridge Farm Business Centre, Twyning – A 4.0 ha extension. An application for 33,329 sqm of B8 employment , on 11.71 ha has been approved here, at appeal (App. No. 21/01498/OUT).
- Duddage Manor Business Park, Twyning – Land to the west has Outline consent for an industrial park of 3,000 sqm on 0.53 ha (App. No. 21/01384/OUT)
- Withytrees Farm, Winchcombe – Subject to a new allocation of 0.41 ha (remaining undeveloped land).

7.7 Council officers also identified ten additional infill plots, in key industrial estates and business parks, for consideration:

- One infill plot at Bamfurlong Industrial Park, Churchdown/Staverton, of 0.60 ha
- One infill plot at Tewkesbury Business Park, Tewkesbury, of 0.40 ha
- Three infill plots at Cleeve Business Park, Bishops Cleeve, totalling 9.83 ha
- Five infill plots at Gloucester Business Park, totalling 9.40 ha

7.8 No additional relevant unimplemented employment consents were identified. Thus the local baseline supply of employment land in Tewkesbury is 22 sites providing 81.52 ha of employment land. This comprises:

- 29.80 ha in the three JCS Allocations
- 6.51 ha in two Policy EMP1 Major Employment Sites
- 24.98 ha in seven Policy EMP2 Rural Business Centre Extension Sites
- 20.23 ha in ten infill plots

Employment Sites Analysis

7.9 Analysis of those 12 sites is considered in proformas at Appendix 10 and mapped in Appendix 11. Table 31 provides a summary of that assessment.

Table 31 – Summary of Employment Sites Assessment (Land Supply)

Site Reference	Site Name and Address	Baseline Employment Land Supply, ha	Comments	Conclusions/ Recommendations	Availability, Years	Realistic Employment Supply – Land, ha – Gross (Net*) Floorspace, Sqm**
JCS Sites						
Policy A1, JCS	Innsworth and Twigworth	9.1	Robert Hitchins, Taylor Wimpey UK, EPS Electricity own (Robert Hitchins are the developers). The wider site has Outline Consent for a mixed use development of up to 1,300 dwellings and 8.31 ha of land for employment generating uses comprising a neighbourhood centre of 4.23ha , office park of 1.31ha (E(g) and business park of 2.77ha (E(g) and B8 uses), primary school, open space, landscaping, parking and supporting infrastructure and utilities, and the creation of new vehicular accesses from the A40 Gloucester Northern Bypass, Innsworth Lane and Frogfurlong Lane (App. No. 15/00749/OUT). Other consents: • The north of the site has consent for multiple housing parcels and a discount foodstore (App. No. 18/01285/APP, 19/00996/APP, 21/00841/APP, 22/01225/APP, 25/00290/APP, 26/00293/APP) • The main access road through the site is consented and developed (App. No. 18/01284/APP) • A site of 1.54 ha has Reserved Matters Consent for a primarily B8 warehouse of 6,028 sqm (App No. 24/00626/APP) • A site of 1.09 ha, north of the previous, has Reserved Matters consent for a primarily B8 warehouse of 4,174 sqm (App. No. 24/00627/APP).	Development has Outline and (partially) Reserved Matters consents and is being actively marketed with a development partner associated and key infrastructure in place. There remain questions as to whether Grade A offices can be viably developed here, but the development of E(g)/B-Class uses generally is very likely. The site should be protected for E(g)/B-Class uses in the SLP.	5-10	9.1 (4.08) 16,148

Site Reference	Site Name and Address	Baseline Employment Land Supply, ha	Comments	Conclusions/ Recommendations	Availability, Years	Realistic Employment Supply – Land, ha – Gross (Net*) Floorspace, Sqm**
			The housing in the north is under development by Taylor Wimpey as Whittle Gardens. The employment site of 2.77 ha is on the market, for design and build options, as Innesworth Business Park In the north east of the site, Innsworth Office Park is on the market for new Grade A office buildings of 650-5,946 sqm on 1.31 ha. The development partner for both in Robert Hitchens. Agents for both include Alder King, JLL and Cushman and Wakefield. The two warehouses proposed enjoy strong access off the A40, linking to facilities around Gloucester such as Unilever as well as east to Advanced Manufacturing facilities around Gloucestershire Airport. The two properties could provide some logistical support to such industries. The existing adjacent Innsworth Technology Park is mostly occupied by traditional manufacturing, engineering and motor trade/repair companies. The role of Key Sectors in Innsworth Office Park will depend on what level and quality of offices are ultimately brought forward here, given national viability constraints in office development. However, a good quality office scheme will likely have a role in supporting the Financial Services, Digital and Technologies and Professional and Business sectors, particularly serving the Gloucester market (as most other office schemes proposed are in and around Cheltenham). Constraints			

Site Reference	Site Name and Address	Baseline Employment Land Supply, ha	Comments	Conclusions/ Recommendations	Availability, Years	Realistic Employment Supply – Land, ha – Gross (Net*) Floorspace, Sqm**
			• Part of site is Flood Zone 2 • Parts of the site are at risk from surface water flooding. • Has a Public Right of Way passing through part of the site • Within 500m of Site of Special Scientific Interest.			
Policy A2, JCS	South Churchdown	17.4	RR Bristol Ltd, Newbridge Construction Ltd, Private Owner own No identified development proposals, but the site remains available to meet needs, in a key location. Present access through the existing Business Park is constrained and it is expected that a new access off the A417 will be required to open up this land. Elmbridge Court Business Park is a modern good quality businesses park, accommodating a range of micro and small businesses focused on the Financial Services and Professional and Business sectors. Further development could build on this, but its strong location could also support logistics and Advanced Manufacturing, assuming appropriate road access can be provided. Constraints • Northen section is in Flood Zones 2/3 • Parts of the site are at risk from surface water flooding. • Public Right of Way goes through south • Constrained access • Electricity pylon on southwest of site.	Well located growth opportunity site but will require infrastructure investment to bring forward. No identified development plans, but it remains available to meet needs. The site should be protected for E(g)/B-Class uses in the SLP.	10-15	17.4 (10.44) 41,760

Site Reference	Site Name and Address	Baseline Employment Land Supply, ha	Comments	Conclusions/ Recommendations	Availability, Years	Realistic Employment Supply – Land, ha – Gross (Net*) Floorspace, Sqm**
Policy A3, JCS	North Brockworth	3.30	Gloucestershire County Council, Private Individuals, five housebuilders own Site has Outline Consent for a mixed-use development of up to 1,500 dwellings, including extra care housing, community facilities (totalling 2,500 sqm), E(g)/B8 employment uses (totalling 22,000 sqm), health facilities and formal and informal public open space (App. No.12/01256/OUT) The site has consent for multiple housing parcels and sports facilities (App. No. 18/00109/APP, 18/00410/APP, 18/00864/APP, 19/00537/APP, 22/00251/APP). Wider scheme is referred to as Perrybrook Housing under development with housebuilders including Crest Nicholson and Gloucestershire County Council (with the district councils) providing affordable housing The 22,000 sqm of E(g)/B8 employment uses is proposed in the west of the site, adjacent to the M5, south east of Junction 11A. There are no Reserved Matters consents associated with it The land, in part, was marketed for disposal to commercial developers, owner-occupiers, or business park operators but is no longer available. Current development plans are not known. The Outline Application specifically indicates that development here will differ from, and not compete with, nearby Gloucester Business Park. Its position by an M5 Junction and B8 consent make a logistics	Prominently located employment site, the only plot in the supply directly adjacent to the M5 it will likely attract interest from logistics developers/operators, although there are no clear development plans at this time. The site should be protected for E(g)/B-Class uses in the SLP.	10-15	3.30 (2.81) 22,000

Site Reference	Site Name and Address	Baseline Employment Land Supply, ha	Comments	Conclusions/ Recommendations	Availability, Years	Realistic Employment Supply – Land, ha – Gross (Net*) Floorspace, Sqm**
			development likely here which could indirectly support a range of sectors, including Advanced Manufacturing. Constraints • Trees onsite • Partly in Flood Zones 2-3 • Includes land at risk from surface water flooding.			
Policy EMP1 Sites						
Local Plan Policy EMP1	Ashville Business Park Extension, Churchdown/Staverton	0.61 (Remaining undeveloped land from a larger site of 3.50 ha)	Hammonds Rutts Investments own In use for parking/car storage for the adjacent car showroom. While it may represent a long term development opportunity, for the foreseeable future it appears to be a well-used and integral part of the showroom and is not available. It is thus not reviewed further.	-	-	-
Local Plan Policy EMP1	Bamfurlong Industrial Park Extension, Churchdown/Staverton	5.90	Gloucester City Council and Cheltenham Borough Council own Hybrid planning consent for a new business park development, including: • Full permission for the provision of a new site access off the B4063, internal estate roads and associated infrastructure • 2. Outline permission for a mixed use development comprising of E(g), B2 and B8 employment use on 5.9 ha of land (App. No. 20/00758/FUL). The site is on the market as CGX Connect Business Park for 30,000 sqm of floorspace, as design and build opportunities. The access road was completed	Key expansion site within the economic cluster of Gloucestershire Airport with a consent for development which is being progressed. It should be protected in the SLP for E(g)/B-class uses.	1-5	5.90 (4.43) 30,000

Site Reference	Site Name and Address	Baseline Employment Land Supply, ha	Comments	Conclusions/ Recommendations	Availability, Years	Realistic Employment Supply – Land, ha – Gross (Net*) Floorspace, Sqm**
			in 2021/2022. The development is understood to be attracting interest from potential occupiers. At the time of writing it is not clear how ongoing attempts by Gloucester City Council and Cheltenham Borough Council to sell the wider Airport will affect this scheme. Site falls between Bamfurlong Industrial Park, Ashville Business Park and particularly Meteor Business Park, which are key local centres for Advanced Manufacturing with specialisms in Aerospace and Defence, including companies such as Actemium ICS, Safran and Ontic Engineering & Manufacturing. Further high quality premises here provides a strong opportunity to grow this local cluster. Constraints • Noise from airport • Includes areas of land at risk from surface water flooding.			
Local Plan Policy EMP1 (Infill site not directly identified in the Local Plan)	Bamfurlong Industrial Park, Churchdown/Staverton	0.60	Clarkson Evans Holdings own No planning applications/consents No identified proposals but remains a valuable infill site within a key industrial estate. At present this is the only readily available growth site within the airport- linked Employment Areas of the B4063. The wider area includes a substantial group of Advanced Manufacturing/Defence companies, particularly focused towards aerospace including Actemium ICS, Safran, Dowty amongst others. This plot could support small scale growth here.	Small but well located infill site within a key growth cluster for the sub-region. It should be protected in the SLP for E(g)/B-class uses.	1-5	0.60 (0.54) 2,160

Site Reference	Site Name and Address	Baseline Employment Land Supply, ha	Comments	Conclusions/ Recommendations	Availability, Years	Realistic Employment Supply – Land, ha – Gross (Net*) Floorspace, Sqm**
			Constraints None			
Policy EMP2 Sites						
Local Plan Policy EMP2	Homelands Farm Extension, Bishops Cleeve	1.68	Comparo, Amimarum Properties own An Outline planning application for a small scale 'green' commercial/ business park of up to 4,025 sqm was refused in 2012 due to being outside of the settlement boundary and lacking some information on highways impacts (App. No. 11/00663/OUT). Since the previous application was refused there has been no further attempt to develop E(g)/B-Class uses while land to the south, controlled by the farm, has now been developed for housing. Homelands Farm also appears to function solely as a working farm and it is unclear if any other businesses are accommodated here. There is therefore no strong evidence that this land will be developed for E(g)/B-Class uses and it is not considered further.	-	-	-
Local Plan Policy EMP2	Highfield Farm Extension, Elmstone Hardwicke	3.30	NCF Engineering Holdings own. A Hybrid planning application was refused at appeal in 2021, primarily relating to its highways impacts App. No. 20/00464/FUL). This sought: • Full planning permission for the erection of a B2 unit (general industrial) with associated landscaping, access and parking. • Outline planning permission (all matters reserved except access) for a mix of B1, B2 and B8 use classes. A Hybrid application for full planning permission for the erection of a B2 unit and outline permission for a	Although there are some questions over what will ultimately be consented and delivered here, this site remains an active expansion site for an existing local business park, prominently located on the A38. It should be protected for E(g)/B-class uses in the SLP.	1-5	3.30 (2.89) 2,430

Site Reference	Site Name and Address	Baseline Employment Land Supply, ha	Comments	Conclusions/ Recommendations	Availability, Years	Realistic Employment Supply – Land, ha – Gross (Net*) Floorspace, Sqm**
			mix of E, B2 and B8 uses is being considered (App. No. 22/00864/FUL). The current proposal is for a B2 unit of 2,045 sqm in the south east with additional premises proposed, in outline to the north and west which could total some 2,430 sqm. The developable site area is identified as 2.89 ha. Access would be from Cursey Lane in the south. It is understood that the initial building would be developed to meet the needs of the site owner, but that subsequent premises will support other businesses. Regardless of whether this current application is approved there seems to be a clear and ongoing aspiration for development here. Occupancy in the existing Business Park is mixed but does include some Advanced Manufacturing businesses including Red Earth Systems (Aerospace), benefiting from strong A38 access. This development provides some opportunity to growth is cluster although in practice the scheme is likely to meet a range of needs. Constraints • Includes areas of land at risk from surface water flooding.			
Local Plan Policy EMP2	Park Farm Industrial Estate Extension, Gretton	1.35	Private Individuals own Three additional workshops were consented on the sites, east of the existing Business Centre in 2025 (App. No. 23/01128/FUL). Several previous consents for workspace have now been delivered.	Small, rural expansion site but one that is seeing active growth. It should be protected for E(g)/B-Class uses in the SLP.	1-5	1.35 (1.15) 4,600

Site Reference	Site Name and Address	Baseline Employment Land Supply, ha	Comments	Conclusions/ Recommendations	Availability, Years	Realistic Employment Supply – Land, ha – Gross (Net*) Floorspace, Sqm**
			Current consented proposal is for 550 sqm of industrial/storage workspace. The scheme has seen ongoing small scale growth over the 2020s so further expansion appears likely. The current business base here is focused on trade, and motor trade uses in a relatively isolated rural scheme. Its future contribution to meeting the needs of Key Sectors is likely to be limited. Constraints • Parts of the site are at risk from surface water flooding • Trees on site.			
Local Plan Policy EMP2	Highnam Business Centre, Highnam	3.0	Michael H Keene and Sons Property own Has Outline consent for up to 95 dwellings and up to 3 ha of commercial space (App. No. 21/01392/OUT), granted at appeal. Outline planning permission granted for erection of up to 95 dwellings and up to 3 ha of commercial space was secured in 2023. The housing is proposed on land north of the B4215 appears to be progressing with Bromford Housing Association and secured Reserved Matters consent for appearance, layout, scale and landscaping in May 2026. A Reserved Matters Application for the commercial element is awaiting a decision (App. No. 26/00417/APP). This shows a net developable area of 1.48 ha, to be delivered for 24 units of 73-141 sqm with a total size of 4,084 sqm (GIA). Development will be delivered in four phases, with the first phase being for nine units of 1,070 sqm. The first phase will comprise 100 percent light industrial units.	Extension to a good quality rural business centre with good prospects for growth. It should continue to be protected for E(g)/B-Class uses in the SLP.	1-5	3.0 (1.48) 4,084

Site Reference	Site Name and Address	Baseline Employment Land Supply, ha	Comments	Conclusions/ Recommendations	Availability, Years	Realistic Employment Supply – Land, ha – Gross (Net*) Floorspace, Sqm**
			Subsequent phases may incorporate office and research and development accommodation. The development is being progressed by the owners of the existing business park and while the Reserved Matters Application has yet to be approved it shows good evidence that the scheme will be delivered. The existing business centre is a good quality rural scheme, including a wide range of businesses with a focus on Professional and Business Services. The new premises provides an opportunity to grow this, and other sectors, but the rural nature of the scheme means that it will likely accommodate businesses, of all sectors from its immediate catchment area. Constraints • Grade II listed building in business centre to the northwest • Parts of the site are at risk from surface water flooding • Public Right of way crosses the site.			
Local Plan Policy EMP2	Brockeridge Farm Business Centre Extension, Twyning	14.71	Tiarks Property Development, Private Owner own An Outline application for the extension of Brockeridge Business Park to provide for up to 33,329 sqm of B8 employment use classes was refused in 2025 (App. No. 21/01498/OUT). Previous consented applications include: • Outline planning application for construction of 4,533 sqm of E(g)/B-Class development on 2.49 ha to the east of the existing Business Centre (App. No. 18/00368/OUT) • Construction of 834 sqm of business space (Class E) on land between the business	There are strong aspirations for growth here, and the larger logistics scheme has now been approved and should be identified and protected for E(g)/B-Class uses in the SLP.	5-10	14.71 (11.03) 38,696

Site Reference	Site Name and Address	Baseline Employment Land Supply, ha	Comments	Conclusions/ Recommendations	Availability, Years	Realistic Employment Supply – Land, ha – Gross (Net*) Floorspace, Sqm**
			centre and the pond. Reserved Matters consent, building on the above Outline consent (App. No. 21/00057/APP). The Outline application proposes 11.71 ha of gross land to accommodate some 18 units of differing sizes. It was refused for reasons including that the delivery of a large warehouse scheme in this rural area would have unacceptable impacts. Also that insufficient information was provided on a range of transport and environmental issues. The application was from Tiarks Property Development. This scheme was approved at Appeal in June 2026 (Appeal Ref: 6003077) and it is assumed it will now be progressed. Both of the smaller extension applications are also being progressed by Tiarks Property Development. There is thus a strong aspiration for growth here, driven by a developer. A widened estate road accessing the site (App. No. 19/00447/FUL) has also been implemented. The consented proposal is for a logistics scheme which will link to the adjacent motorway junction. This may support some of the key sectors but will likely be focused more on retail and third party logistics which are the most active regional/national logistics markets at present. Other, development will likely comprise a smaller extension to the existing Business Centre, building on its existing cluster of Financial Services and Professional and Business Services businesses. Constraints			

Site Reference	Site Name and Address	Baseline Employment Land Supply, ha	Comments	Conclusions/ Recommendations	Availability, Years	Realistic Employment Supply – Land, ha – Gross (Net*) Floorspace, Sqm**
			• Parts of the site are at risk from surface water flooding. • Grade II listed building in the site to the south • Pond on site • Trees onsite.			
Local Plan Policy EMP2	Duddage Manor Business Park, Twyning	0.53	Private Owner owns The site has Outline consent for E(g), B2, B8 premises comprising six larger units and six smaller units (App. No. 21/01384/OUT), consented in 2024. Nine industrial buildings are proposed in total to provide a relocation for an existing company including six starter units of some 100 sqm each for fledgling companies to develop their business. Some 3,000 sqm in total. The proposal covers 1.13 ha of net land. The application was made by Rhino Land. The site is now on the market, for sale, with the consent at a guide price of £1 million (Fisher German are agents). Implementation will thus be dependent on the plans of the new owner. Scheme will build on an existing rural business centre which accommodates companies such as Aquamarine Chemicals and Cool Concerns (a training provider on refrigeration) which have at least links to Advanced Manufacturing. A stronger element of offices here would also allow the site to support businesses in Professional and Business Services, Financial Services and possibly Creative Industries/Digital Technologies, mostly drawn from the surrounding rural catchment but possibly also linked to the nearby Motorway junction. Constraints	Expansion site, with ongoing prospects for growth particularly to deliver smaller starter units for new businesses and those moving into their first accommodation. It should be protected in the SLP for E(g)/B-Class uses.	1-5	0.53 (1.13) 3,000

Site Reference	Site Name and Address	Baseline Employment Land Supply, ha	Comments	Conclusions/ Recommendations	Availability, Years	Realistic Employment Supply – Land, ha – Gross (Net*) Floorspace, Sqm**
			• Public Right of Way crosses the site.			
Local Plan Policy EMP2	Withytrees Farm Extension, Winchcombe	0.41	Two Private Owners own Wider site is subject to an existing planning consent for refurbishment and partial redevelopment (App. No.11/00545/FUL) which has been at least partially implemented. No identified plans specifically for the remaining undeveloped land. Existing Businesses Park mostly offers budget quality space to local firms, with a focus on retail/trade uses. Nearby Isbourne Business Centre is similar. Unless new space is of a notably higher quality it is unlikely to have a significant role is supporting Key Sector development. Constraints • Parts of the site are at risk from surface water flooding. • Area of Natural Beauty • Public Right of Way crosses the site.	Small infill plot in an existing rural business park. There are no identified plans here, but the plot could still have a modest role in supporting rural growth. It should be protected in the SLP for E(g)/B-Class uses.	10-15	0.41 (0.37) 1,480
Tewkesbury Business Park, Tewkesbury Sites						
Local Plan Policy EMP1 (Infill site not directly identified in the Local Plan)	Tewkesbury Business Park, Tewkesbury	0.40	Grace Pension Trustees own No planning applications/consents No identified plans Small infill plot within a large, mixed employment area and well located in terms of services and strategic road access. A mostly industrial area, Tewkesbury Business Park includes a number of Advanced Manufacturing companies such as Geometric Manufacturing, with Moog close by. There are also some Professional and Business Services and Digital and Technologies businesses in	Small infill site, with some potential to support Key Sectors. Public partners could usefully engage with the site owners to determine if they have any plans for investment, and what support might be needed to allow its development. The site should be protected for E(g)/B-Class uses, avoiding its development for other services, if possible.	15+	0.40 (0.36) 1,440

Site Reference	Site Name and Address	Baseline Employment Land Supply, ha	Comments	Conclusions/ Recommendations	Availability, Years	Realistic Employment Supply – Land, ha – Gross (Net*) Floorspace, Sqm**
			the area, including Paragon. This site could allow modest growth in these sectors. It's position could support an office use, if viable. Constraints None			
Cleeve Business Park, Bishops Cleeve Sites						
Local Plan Policy EMP1 (Infill site not directly identified in the Local Plan)	Miles Road, Cleeve Business Park	1.74	GE Aviation Systems own No identified development plans. Site forms part of the secure GE site and would most likely be developed by that occupier. However the site is located on the main road frontage and could be separated out and offered to other businesses. Would most likely be developed for the use of GE or another company in its supply chain, with a focus on Advanced Manufacturing/Defence. Constraints • Parts of the site are at risk from surface water flooding.	Infill site within facilities for a major regional employer. Protect for E(g)/B-Class uses in the SLP.	10-15	1.74 (1.48) 5,920
Local Plan Policy EMP1 (Infill site not directly identified in the Local Plan)	Orchard Road, Cleeve Business Park	1.86	GE Aviation Systems own No identified development plans. Site forms part of the secure GE site and would most likely be developed by that occupier. This site sits in the heart of the GE facility and thus could not be easily split off and offered to other businesses to meet wider economic needs. It is thus not considered further.	-	-	-
Local Plan Policy EMP1 (Infill site not directly	Blackburn Road, Cleeve Business Park	6.23	Smiths Aerospace, GE Aviation Systems No identified development plans.	Infill site within facilities for a major regional employer. Protect for E(g)/B-Class uses in the SLP.	10-15	6.23 (4.67) 18,680

Site Reference	Site Name and Address	Baseline Employment Land Supply, ha	Comments	Conclusions/ Recommendations	Availability, Years	Realistic Employment Supply – Land, ha – Gross (Net*) Floorspace, Sqm**
identified in the Local Plan)			Site forms part of the secure GE site and would most likely be developed by that occupier. However the site is also accessible from Furlong Business Park to the north and thus and could be separated out and offered to other businesses. Would most likely be developed for the use of GE or another company in its supply chain, with a focus on Advanced Manufacturing/Defence. Constraints • Parts of the site are at risk from surface water flooding.			
Gloucester Business Park Sites						
-	Land west of Pioneer Avenue, Gloucester Business Park (Plot 2100 or Plot 5)	1.40	Gloucester BP Developments (Arlington) The wider Business Park benefits from an extant planning consent (original outline consent granted in 1992 (App. No. 88T/7689/01/01 and subsequently extended with consent references App. No. 01/7689/0095/FUL and App. No. 11/01155/FUL) for office, industrial and warehouse uses. Reserved Matters consent for an industrial/warehouse development (App. 23/00276/APP), for a 6,773 sqm (GIA) industrial or warehouse building. The site, along with five others is now being actively marketed for a design and build development with agents Alder King and CBRE. Proposed for industrial/warehouse uses in Gloucester Business Park which is an established centre for Advanced Manufacturing with occupiers including TBS Engineering, G-TEKT Europe and	Small but prominent expansion site in a key sub-regional business park with potential to support the growth of key economic clusters. It should be protected for E(g)/B-Class development in the SLP.	1-5	1.40 (1.26) 6,773

Site Reference	Site Name and Address	Baseline Employment Land Supply, ha	Comments	Conclusions/ Recommendations	Availability, Years	Realistic Employment Supply – Land, ha – Gross (Net*) Floorspace, Sqm**
			Dowty (aerospace/defence) as well as offices for defence companies such as Lockheed Martin and BAE Systems. This plot could support growth in those sectors. The Business Park also has a sizable cluster of Financial Services and Professional Services companies such as Handelsbanken and Benefact Trust, but the site is not proposed for office uses. Constraints • Parts of the site are at risk from surface water flooding.			
-	Land South of Lobleys Drive, Gloucester Business Park (Plot 4)	2.60	Gloucester BP Developments (Arlington) own The wider Business Park benefits from an extant planning consent (original outline consent granted in 1992 (App. No. 88T/7689/01/01 and subsequently extended with consent references App. No. 01/7689/0095/FUL and App. No. 11/01155/FUL) for office, industrial and warehouse uses. Reserved Matters consent for an industrial/warehouse development (App. 23/00275/APP) for 16,481sqm (GIA) of industrial or warehouse premises, spread across Plots 3-4. The site, along with five others is now being actively marketed for a design and build development with agents Alder King and CBRE. Proposed for industrial/warehouse uses in Gloucester Business Park which is an established centre for Advanced Manufacturing with occupiers including TBS Engineering, G-TEKT Europe and Dowty (aerospace/defence) as well as offices for defence companies such as Lockheed Martin and	Small but prominent expansion site in a key sub-regional business park with potential to support the growth of key economic clusters. It should be protected for E(g)/B-Class development in the SLP.	1-5	2.60 (2.21) See below for Floorspace

Site Reference	Site Name and Address	Baseline Employment Land Supply, ha	Comments	Conclusions/ Recommendations	Availability, Years	Realistic Employment Supply – Land, ha – Gross (Net*) Floorspace, Sqm**
			BAE Systems. This plot could support growth in those sectors. The Business Park also has a sizable cluster of Financial Services and Professional Services companies such as Handelsbanken and Benefact Trust, but the site is not proposed for office uses. Constraints • Parts of the site are at risk from surface water flooding.			
-	Land south of Hurricane Road, Gloucester Business Park (Plot 3)	0.80	Gloucester BP Developments (Arlington) own The wider Business Park benefits from an extant planning consent (original outline consent granted in 1992 (App. No. 88T/7689/01/01 and subsequently extended with consent references App. No. 01/7689/0095/FUL and App. No. 11/01155/FUL) for office, industrial and warehouse uses. Reserved Matters consent for an industrial/warehouse development (App. 23/00275/APP) for 16,481sqm (GIA) of industrial or warehouse premises, spread across Plots 3-4. The site, along with five others is now being actively marketed for a design and build development with agents Alder King and CBRE. Proposed for industrial/warehouse uses in Gloucester Business Park which is an established centre for Advanced Manufacturing with occupiers including TBS Engineering, G-TEKT Europe and Dowty (aerospace/defence) as well as offices for defence companies such as Lockheed Martin and BAE Systems. This plot could support growth in those sectors. The Business Park also has a sizable	Small but prominent expansion site in a key sub-regional business park with potential to support the growth of key economic clusters. It should be protected for E(g)/B-Class development in the SLP.	1-5	0.80 (0.72) 16,481 (across Plots 3-4)

Site Reference	Site Name and Address	Baseline Employment Land Supply, ha	Comments	Conclusions/ Recommendations	Availability, Years	Realistic Employment Supply – Land, ha – Gross (Net*) Floorspace, Sqm**
			cluster of Financial Services and Professional Services companies such as Handelsbanken and Benefact Trust, but the site is not proposed for office uses. Constraints • Parts of the site are at risk from surface water flooding.			
-	Land East of Hurricane Road, Gloucester Business Park	0.80	TBS Engineering owns The wider Business Park benefits from an extant planning consent (original outline consent granted in 1992 (App. No. 88T/7689/01/01 and subsequently extended with consent references App. No. 01/7689/0095/FUL and App. No. 11/01155/FUL) for office, industrial and warehouse uses. No identified plans for development. The site is most likely to be held for the further expansion of the TBS factory but could be made available to meet wider business needs. In June 2026 TBS Engineering was acquired by Rosendahl Nextrom, with the intention to grow their combined operations in the production of batteries. It is not yet clear if this will require the physical expansion of the TBS facilities at Gloucester Business Park. If used by TBS for expansion it would directly support the Advanced Manufacturing sector, within a wider cluster of Advanced Manufacturing and Defence businesses. Constraints	Small but prominent expansion site in a key sub-regional business park with potential to support the growth of key economic clusters. It should be protected for E(g)/B-Class development in the SLP.	5-10	0.80 (0.72) 2,880

Site Reference	Site Name and Address	Baseline Employment Land Supply, ha	Comments	Conclusions/ Recommendations	Availability, Years	Realistic Employment Supply – Land, ha – Gross (Net*) Floorspace, Sqm**
			• Parts of the site are at risk from surface water flooding.			
-	Golf Club Lane, Gloucester Business Park (Includes Plot 2)	3.80	Invista Textiles (U.K.) Ltd, Cotsworld Chase Management Company (Gloucester) Ltd own (Gloucester BP Developments (Arlington) is developer). The wider Business Park benefits from an extant planning consent (original outline consent granted in 1992 (App. No. 88T/7689/01/01 and subsequently extended with consent references App. No. 01/7689/0095/FUL and App. No. 11/01155/FUL) for office, industrial and warehouse uses. Site has outline consent, secured at appeal, for a mixed-use development of 220 dwellings, B8 warehousing, provision of a cricket pitch and pavilion, and other associated public open space and highway works (App. No. 11/00091/OUT). Reserved Matters Consent was secured, in 2023, by Gloucester BP Developments (Arlington) for a B2/B8 industrial/warehouse development (App. No. 23/00274/APP). Of the mixed use consent, the housing and sports facilities have been developed but the 13,600 sqm of B8 floorspace with 675 sqm of ancillary office space has not been developed. Access for this development has also yet to be provided. This consent was secured by landowner Invista Textiles (UK) Ltd. After some 15 years it appears unlikely that this proposal will now be implemented.	Constrained backland site which will require investment to deliver. However, 1 ha is being actively promoted for industrial/warehouse development alongside other opportunity sites in the Business Park. It should be protected for E(g)/B-Class development in the SLP.	5-10	3.80 (1.0) 3,259

Site Reference	Site Name and Address	Baseline Employment Land Supply, ha	Comments	Conclusions/ Recommendations	Availability, Years	Realistic Employment Supply – Land, ha – Gross (Net*) Floorspace, Sqm**
			The Reserved Matters Consent is for 3,259 sqm (GIA) of industrial/warehouse premises on 1 ha including arrangements for an improved access along Golf Club Lane. The site, along with five others is now being actively marketed for a design and build development with agents Alder King and CBRE. Proposed for industrial/warehouse uses in Gloucester Business Park which is an established centre for Advanced Manufacturing with occupiers including TBS Engineering, G-TEKT Europe and Dowty (aerospace/defence) as well as offices for defence companies such as Lockheed Martin and BAE Systems. This plot could support growth in those sectors. The Business Park also has a sizable cluster of Financial Services and Professional Services companies such as Handelsbanken and Benefact Trust, but the site is not proposed for office uses. Constraints • Constrained road access • Parts of the site are at risk from surface water flooding • Trees in southwest of the site.			
Total		**81.52**				**77.37 (52.77) 221,791**

Source: BE Group, TBC, Other Stakeholders,

*The Net site size is either identified from planning consents, stakeholder engagement or, where these are not available, uses an 'efficiency ratio' of:

- Small Sites (<2ha): 85-90 percent efficiency
- Medium Sites (2-10ha): 75 – 85 percent efficiency
- Large Sites (10ha +): 60-75 percent efficiency.

This deducts land for:

- Strategic Green Infrastructure
- Sustainable Drainage Systems
- Transport Infrastructure – Major spine roads and dedicated corridors (not on-site parking and manoeuvring areas). It assumes a smaller site will use existing infrastructure surrounding, i.e. existing roads in an industrial estate, while a larger site will require more internal infrastructure, hence have a lower efficiency ratio
- Topographical constraints.

**Again floorspace uses either figures provided in planning consents, by stakeholders or, where these are not available uses a standard developer ratio of 4,000 sqm/hectare or 40 percent site coverage for buildings, with other land used for car parking, internal roads, greenspace, etc.

7.10 As Table 31 shows of a baseline land supply of 81.52 ha in 22 sites, 52.77 ha (net) or 221,791 sqm in 19 sites appears realistically available to meet local needs. This reflects the following adjustments:

- Three sites, totalling 4.15 ha, are unlikely to be developed and are excluded
- The netting of sites, either allowing for the land/floorspace referenced in planning consents or reflecting the standard approach set out in Table 31.

7.11 The three JCS allocations for Tewkesbury – Policy A1: Innsworth and Twigworth, Policy A2: South Churchdown; Policy A3: North Brockworth – could provide a net supply of 17.33 ha or 79,908 sqm of floorspace (36.0 percent of the total floorspace). In the case of Policy A1: Innsworth and Twigworth and Policy A3: North Brockworth there are at least Outline planning consents for the employment elements and development partners and/or marketing agents attached to the projects, giving some confidence that properties will ultimately be delivered. Policy A2: South Churchdown does not yet have clear delivery plans associated with it but remains available, on relatively unconstrained land adjacent to an established business park.

7.12 The majority of land is likely to support industrial and warehouse uses, some sites which might support high value uses, including Key Sectors include:

- Policy A1: Innsworth and Twigworth (4.08 ha net) – Includes proposals for larger warehouses, plus a 2.77 ha business park, marketed for Grade A offices as design and build options. There are questions about whether very high grade offices would be viable here, but the location has at least some potential to support Key Sectors
- Policy A2: South Churchdown (2.81 ha net) – Has the potential to support logistics and advanced manufacturing uses, assuming appropriate road access can be provided
- Policy A3: North Brockworth (10.44 ha net) – Likely to support the logistics sector
- Policy EMP1: Bamfurlong Industrial Park Extension, Churchdown/Staverton (4.43 ha net) – The site is on the market as CGX Connect Business Park for 30,000 sqm of floorspace, as design and build opportunities. It falls between Bamfurlong Industrial Park, Ashville Business Park and particularly Meteor Business Park, which are key local centres for Advanced Manufacturing with specialisms in Aerospace and Defence. Further high quality premises here provides a strong

opportunity to grow this local cluster. There is another 0.60 ha of infill land at Bamfurlong Industrial Park

- Policy EMP2: Brockeridge Farm Business Centre Extension, Twyning (11.03 ha) – Now has consent for 33,329 sqm of warehousing premises on a strategic location close to Junction 1, M50
- Cleeve Business Park, Bishops Cleeve – 6.15 ha (net), in two sites, is available within the high value GE Aerospace facility which could support the further growth of Advanced Manufacturing industries within the SLP Area
- Gloucester Business Park – 5.91 ha (net) is available in five sites, to allow the growth of this significant regional business park, which accommodates clusters of Advanced Manufacturing and Professional and Business Services/Financial Services companies.

Geographic Distribution of the Tewkesbury Realistic Employment Land Supply

7.13 Table 32 shows the geographic split of the realistic employment land supply in Tewkesbury.

Table 32 – Tewkesbury Location Assessment – Realistic Supply

Location	No. of Sites	Land, ha (net)	Floorspace, Sqm	Percentage (of Floorspace)
Gloucestershire Airport	4	19.49	90,068	40.6
Rural Settlements	6	18.05	54,290	24.5
Gloucester Business Park/Brockworth	6	8.72	51,393	23.2
Cleeve Business Park, Bishops Cleeve	2	6.15	24,600	11.1
Tewkesbury town	1	0.36	1,440	0.6
Total	**19**	**52.77**	**221,791**	**100.0**

Source: BE Group, 2026

7.14 As Table 32 shows, 63.8 percent the supply is focused in settlements on the edge of Gloucester, around Gloucestershire Airport as well as at Gloucester Business Park/Brockworth. This is key as there is no presently allocated employment land available within the city boundary. Another quarter is focused in a range of rural settlements, but with a focus in the north of the borough, close to the M50. Cleeve Business Park, Bishops Cleeve also has substantial growth land, but options in

Tewkesbury town are limited to a single small infill site.

Site Scoring – Realistic Supply

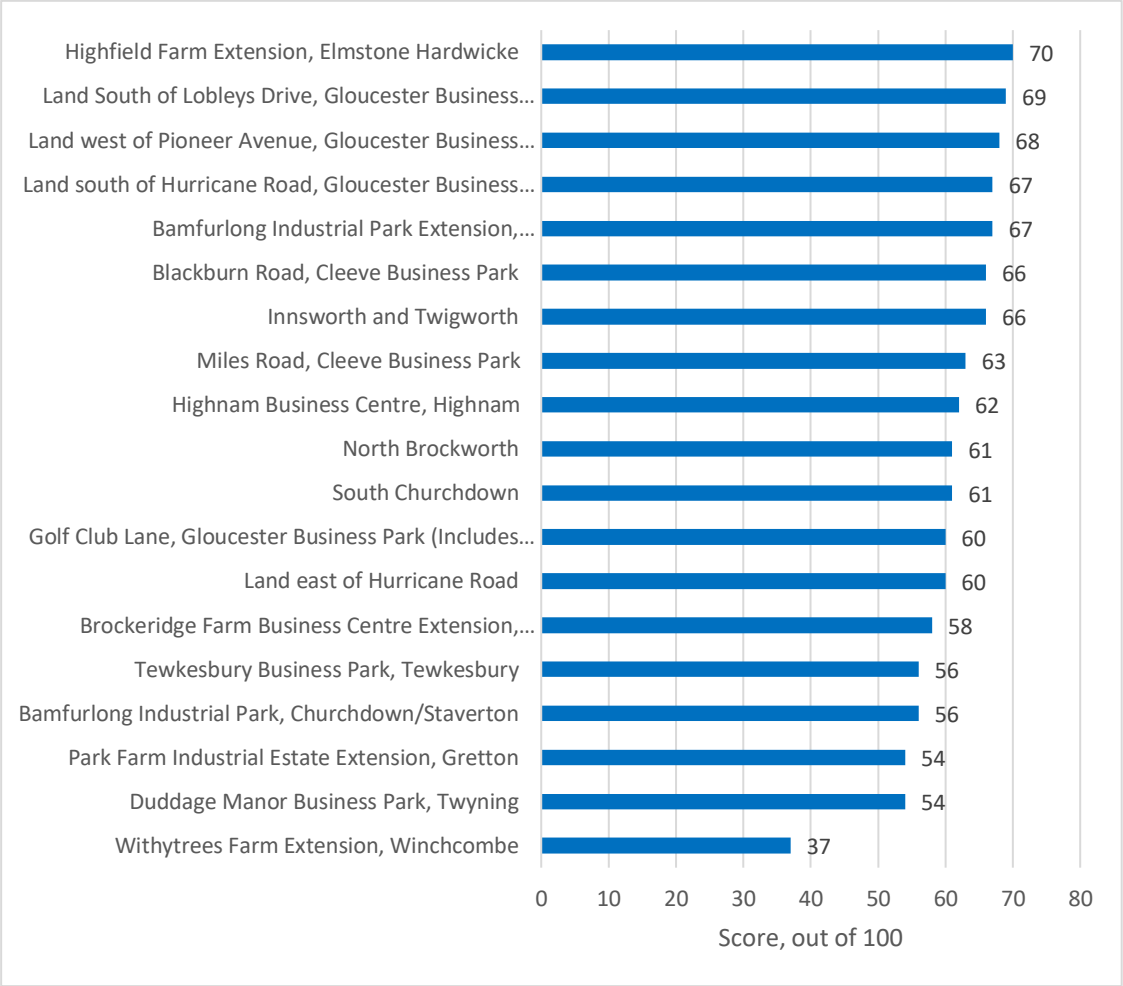
7.15 Each Site has been scored against ten criteria relating to Site Location and Access, Development Prospects, Site Conditions and Availability. The maximum score possible is 100. The Scoring Criteria can be found in Appendix 3 and individual site scores can be found in Appendix 4. Figure 20 shows the scoring for the 19 sites identified as comprising Tewkesbury's realistic long-term supply. The assessment gives an appraisal of the overall quality of the land resource and provides one measure of what sites could be considered priorities for SLP allocation and what sites are of secondary value.

7.16 The highest scoring site is Policy EMP2: Highfield Farm Extension, Elmstone Hardwicke, a local site but with limited constraints and well located on the A38. Sites at Gloucester Business Park also score well as they benefit from at least Outline planning consent and are actively being marketed for delivery, with an identified development partner (Gloucester BP Developments (Arlington)). They also enjoy reasonable access to the M5/A417.

7.17 The JCS Sites have more average scoring, reflecting the greater range of constraints they must address and likely longer timeframes for delivery, with some uncertainties as to what will ultimately developed at some locations.

7.18 The lowest scoring site is Policy EMP2: Withytrees Farm Extension, Winchcombe, a small rural infill site of average environmental quality, with no development plans associated with it.

Figure 20 – Sites Scoring – Realistic Supply



Source: BE Group, 2026

Employment Area Assessments

7.19 BE Group have reviewed a total of 24 Employment Areas (industrial estates, business parks, rural and urban businesses centres, urban office buildings, farm conversions to E(g)/B-Class uses and facilities for individual businesses) across Tewkesbury. These are urban and rural locations, as identified in Policies EMP1 and EMP2 of the Tewkesbury Borough Plan 2011 – 2031 (2022). Each has been appraised and assessed through a combination of site visits, existing Council data, local intelligence and the views of those involved in the property market in those areas.

7.20 Maps of the 24 areas are provided at Appendix 11, based on their Name.

7.21 Consistent with the approach used in Cheltenham and Gloucester, proformas have been

created for each area (and are provided at Appendix 12), based on the following format, to simplify the data and make it easier to interpret:

- 'Name (address)' is the local authority's designated title for the area, including where relevant the settlement it is located in.
- 'Reference' is the reference number for the area, as designated by this study, alongside the Local Plan policy reference, where this is relevant.
- A brief 'Description' is provided in the form of BE Group's comment on the area.
- 'Key Occupiers' identifies the most significant businesses operating within the area.
- 'Dominant Uses/Business Sectors' provides a description of the main uses on the area, e.g. financial services, advanced manufacturing, general industry, engineering, motor trade, warehousing, etc. with reference to the nine Key Sectors identified and discussed in Sections 2.0 and 3.0.
- 'Links to Key Economic Clusters' considers what wider business clusters does the area relate to now and what clusters might it contribute further to in the future.
- A current occupancy rate is provided as a percentage of the total number of units in the area.
- The size of the area, in hectares, is provided based on data provided by the local authority.
- 'Building Age' considers the average age of the majority of properties in the area with the age categories used being – Pre-1945, 1945-1990, 1990-2010, 2010+ (modern).
- 'Building Quality' takes a subjective view on the quality of premises in each area and considers whether the bulk of the units can be classified as Derelict, Poor, Average or Good.
- 'Area Constraints' are identified, which could include the proximity to planning designations such as Conservation Areas and Listed Buildings, flood risk, the proximity of overhead pylons and other physical issues.
- In 'Opportunities for redevelopment/ expansion', vacant land is identified, as is the scope for redevelopment of particular vacant/derelict properties or sites. Greenfield expansion possibilities are also included, showing opportunities for the growth and intensification of the E(g)/B-Class uses here.
- 'Recommendations' are provided on the main issues of the Area, its future prospects for supporting growth and whether it should be protected for E(g)/B-

Class uses in the SLP. Any required adjustments to Area boundaries, for future Plan mapping are also set out.

- Finally, 'Grade' refers to BE Group's professional opinion on the ranking that should be afforded to the individual area. This has been based on a consideration of the above data and BE Group's professional opinion on each area, reflecting site visits and relevant stakeholder comments. Combining this data leads to an overall hierarchical assessment banded A to E. These are described in Table 33.

Table 33 – Grades A to E Definitions

Grade	Definition	Action
A	High quality, prestigious, flagship business areas due to their scale, location and setting. Capable of competing for investment in the regional market place. These are prime sites for marketing to a cross section of users including new inward investors. They can also meet the needs of image-conscious, aspirational companies already in the local authority area	Protect strongly in the SLP Support and expand
B	Good employment sites due to their scale, location and setting. Capable of competing for investment in the sub-regional market place. These are prime sites for marketing to a cross section of users, E(g), B2 and B8, including some new inward investors.	Protect strongly in the SLP Support and expand
C	Key employment sites with an influence over the whole local authority area but primarily geared towards local businesses and E(g)(iii) light industrial, B2 and B8 uses.	Protect in the SLP Support
D	Lower quality locations in residential or rural areas suffering from poor accessibility and massing.	Continue to protect/review through the SLP
E	Very poor quality areas. Widespread vacancy and dereliction in poor environments. Or areas which have been, or are in the process of being, lost to other uses.	Promote alternative uses if possible

Source: BE Group 2026

7.22 Table 34 summarises the findings on each Employment Area.

Table 34 – Assessment of Existing Employment Areas (Existing Premises)

Area Reference: Name	Area, ha	Employment Area Description	Summary of Major Occupiers, Key Sectors and Clusters (Occupancy Rate)	Area Constraints	Opportunities for redevelopment/ expansion	Recommendations	Site Grading
EMP1 Major Employment Sites							
T1.1 (EMP1): Cleeve Business Park (Bishops Cleeve)	32.4	Good quality, low density secure facility for GE Aerospace on the edge of Bishops Cleve, off the A435 road to Cheltenham. It also includes a smaller, average/good quality group of industrial and warehouse units in the north west, including some recently developed.	GE Aerospace ,Ontic Engineering & Manufacturing UK Dominated by several Advanced Manufacturing companies, with a more mixed group of companies in the North West including food producers, construction and photography. GE is a major Advanced Manufacturing facility, with an Aerospace specialism, for the SLP Area, linked to the larger aerospace cluster around Gloucestershire Airport. Ontic also has an Aerospace focus. (100)	• Public Rights of Way cross the site • Trees on site • Includes areas of land at risk from surface water flooding	The GE facility includes 9.83 ha (gross) of expansion land, in three plots, which has been included in Tewkesbury's employment land supply.	A key Advanced Manufacturing facility for the SLP Area, including expansion land, along with a valuable stock of modern industrial units. The area should be protected in the SLP for E(g)/B-Class uses.	A
T1.2 (EMP1): Malvern View Business Park (Bishops Cleeve)	6.32	A local industrial estate comprising a range of small and mid-sized industrial and warehouse properties, on an edge of centre location off Stoke Road.	Edgewest Plastics, Skyline Systems, Kiwa Training, Shorade. Mixed group of occupiers in areas such as construction, training, manufacturing, vehicle repair and vehicle hire. A mixed group of companies, mostly serving the local market and with only limited links to wider clusters. (100)	• Trees on site • Includes areas of land at risk from surface water flooding • Housing adjacent	The previously identified expansion land to the south west is now under development for a gym. There is 2.37 ha of undeveloped scrubland to the north, accessible from Stella Way which could allow some growth, although it is close to housing.	Active local industrial estate, accommodating a range of local businesses. The area should be protected in the SLP for E(g)/B-Class uses.	C

Area Reference: Name	Area, ha	Employment Area Description	Summary of Major Occupiers, Key Sectors and Clusters (Occupancy Rate)	Area Constraints	Opportunities for redevelopment/ expansion	Recommendations	Site Grading
T1.3 (EMP1): Gloucester Business Park, Brockworth	106.70	Strategic scale, mixed business park on the edge of Gloucester, including a group of large moder offices in the north west and larger B2/B8 units in the south east, with access to Junction 11A, M5.	G-TEKT Europe, Laithwaite's, Dowty, BAE Systems, Invista, TBS Engineering, Lockheed Martin Mixed manufacturing including textiles, battery production and aerospace as well as logistics. Also a range of professional, financial and legal office uses. Includes the largest office park in the SLP Area which accommodates a range of regional and national firms with a focus on Financial Services. Also accommodates a cluster of large established firms in Advanced Manufacturing including Dowty (Aerospace) TBS Engineering (battery production). The office component also includes administrative facilities for major defence companies including BAE Systems and Lockheed Martin (95)	• Parts of the site are at risk from surface water flooding • Trees onsite • Housing adjacent	Includes 9.40 ha (gross) of expansion land, in five plots, which has been included with Tewkesbury's employment land supply.	Major mixed industrial, warehouse and office park accommodating a range of national (and international) businesses in strategic scale facilities. The area should be protected in the SLP for E(g)/B-Class uses.	A
T1.4 (EMP1): Staverton Technology Park (Churchdown / Staverton)	4.70	Small, local scale industrial estate, in two parts with mid-sized units to the west, off Herrick Way, and smaller workshops in the east, off Staverton Connection. The area is located north east of Gloucestershire Airport and falls into its wider employment cluster.	Creed, Future Advanced Manufacture, BRG Technologies, Horsebridge Network Systems, Pennant International Group Construction, mixed manufacturing, food production, trade and motor trade. The area includes some Advanced Manufacturing companies Pennant International but mostly meets local requirements for small and mid-sized industrial units supporting a broad range of sectors. (100)	• Most of the area is in Flood Zones 2/3 (Hatherley Brook passes through the area) • Parts of the site are at risk from surface water flooding • Trees onsite • Housing adjacent	Land to the south is identified as an option for growth in the HELAA.	Active local industrial estate, falling into a wider cluster. The area should be protected in the SLP for E(g)/B-Class uses.	C
T1.5 (EMP1): Meteor Business Park (Churchdown / Staverton)	10.5	A modern industrial estate comprising mostly mid-sized industrial properties which accommodate a number of high value Advanced Manufacturing firms. The area is located north west of Gloucestershire Airport and falls into its wider employment cluster.	Safran, Quickmach Engineering, Ontic Engineering and Manufacturing, Spectrum Medical, Actemium ICS Advanced Manufacturing (Aerospace), Engineering, Medical Business Park has a key cluster of Advanced Manufacturing businesses, with an emphasis on Aerospace and Defence. (90)	• Parts of the site are at risk from surface water flooding	Airport land to the east has been put forward as a growth option in the HELAA.	High quality industrial estate of regional significance, falling into a wider cluster. The area should be protected in the SLP for E(g)/B-Class uses.	A

Area Reference: Name	Area, ha	Employment Area Description	Summary of Major Occupiers, Key Sectors and Clusters (Occupancy Rate)	Area Constraints	Opportunities for redevelopment/ expansion	Recommendations	Site Grading
T1.6 (EMP1): Ashville Business Park (Churchdown / Staverton)	20.9	Group of mostly larger industrial and warehouse units, including some good quality new development in the east. Includes a major production facility for Safran in the west. The area is located north west of Gloucestershire Airport and falls into its wider employment cluster.	Spectrum Medical, St Johns Ambulance, Safran Advanced Manufacturing (Aerospace), Engineering, Medical, Motor Trade Includes major Advanced Manufacturing facilities for Safran, one of several facilities for this company in the Airport area. Several other high value companies in the area, e.g. Spectrum Medical. (90)	• Most of the north area is in Flood Zones 2/3 (Hatherley Brook passes through the area) • Parts of the site are at risk from surface water flooding • Trees onsite	Expansion land in the east has now been developed or is in use for car storage.	High quality industrial estate of regional significance, falling into a wider cluster. The area should be protected in the SLP for E(g)/B-Class uses. The developed expansion land should be included in the area boundary. The Jaguar-Landover and Mercades car dealerships on the frontage could be excluded from the Area.	A
T1.7 (EMP1): Bamfurlong Technology Park (Churchdown / Staverton)	10.2	Mixed industrial park with some larger industrial and warehouse businesses in the west (Anson Business Park), including some Advanced Manufacturing companies, and older accommodation for local businesses in the east. The area is located north east of Gloucestershire Airport and falls into its wider employment cluster.	Saint-Gobain Abrasives, Intoco, Dowty, Piston Distillery, The Fulfilment Warehouse Mixed manufacturing including Aerospace, Engineering, Steel and other materials as well as a distillery, some logistics, trade and health and safety consultancy As with other Employment Areas around the Airport, the Area accommodates several Advanced Manufacturing companies, with an Aerospace/Defence focus, most notably Dowty. (85)	• Parts of the site are at risk from surface water flooding • Trees onsite	Area has two identified expansion sites: • Bamfurlong Industrial Park Extension (Consented for a new business park development, CGX Connect Business Park, of 30,000 sqm west of the existing Employment Area) – 5.90 ha • Bamfurlong Industrial Park (land in Anson Business Park) – 0.60 ha. Both are considered further as Employment Sites for Tewkesbury.	Average quality industrial estate accommodating a mix of local and regional/national firms, with consent for further growth, falling into a wider cluster. The area should be protected in the SLP for E(g)/B-Class uses.	B
T1.8 (EMP1): Innsworth Technology Park (Innsworth)	4.2	Small, mixed industrial estate, accommodating mostly local businesses in an edge of settlement area, surrounded by a sub-regional development area and with improved access off the A40.	Versatile Controls, GB Forklifts, D G Welding, PJT Pumping Services. Trade and motor repair, construction and mixed engineering. Accommodates a mix of local companies with limited links to Key Sectors (100)	• Parts of the site are at risk from surface water flooding	Area is bounded by the JCS allocation A1: Innsworth and Twigworth with 4.08 ha of land allocated for employment. Road access from the A40 has been completed for this. This is considered further as Employment sites for Tewkesbury.	Small but active and well occupied local industrial estate, which links to a key sub-regional growth area. The area should be protected in the SLP for E(g)/B-Class uses.	C

Area Reference: Name	Area, ha	Employment Area Description	Summary of Major Occupiers, Key Sectors and Clusters (Occupancy Rate)	Area Constraints	Opportunities for redevelopment/ expansion	Recommendations	Site Grading
T1.9 (EMP1): Tewkesbury Business Park (Tewkesbury)	75.2	A very large mixed use site for industrial, warehousing and office uses. It incorporates larger industrial units in the east and more local scale properties in the west. Forms part of a larger business cluster in Tewkesbury, around Junction 9, M5.	Hydro Building Systems, Eastbrook Work, L3Harris Tewkesbury, Smiths, Smurfit Westrock, Cotteswold Dairy Construction, mixed engineering, logistics/haulage and financial and professional services Includes Miller Court, which offers larger offices accommodating Financial Services and Professional and Business Services businesses. Also includes some Advances Manufacturing firms although these are generally a minority. (95)	• The north and west of the Area is in Flood Zones 2/3 associated with Carrant Brook • Parts of the site are at risk from surface water flooding • Housing adjacent • Trees onsite	Includes one small expansion site of 0.40 ha located in the south side of Tewkesbury Business Park, west of Travelodge and north of Porsche. This is considered further as an Employment Site for Tewkesbury.	Large scale, active employment area, part of a wider cluster around Tewkesbury and Junction 9, M5. The area should be protected in the SLP for E(g)/B-Class uses.	B
T1.10 (EMP1): Ashchurch Business Park (Tewkesbury)	39.0	Major industrial area, accommodating large scale production facilities for Moog in the south and east, plus a large warehouse unit, with a mix of smaller mostly industrial units in the west. Forms part of a larger business cluster in Tewkesbury, around Junction 9, M5.	Moog Aircraft Group, IDEMIA, Bensons for Beds, DXC Technology Advanced Manufacturing, logistics, trade, engineering Includes one large Advanced Manufacturing business with others spread throughout the area. (85)	• Parts of the site are at risk from surface water flooding • Housing adjacent	Area is fully developed and tightly bound by other uses.	Large scale, active employment area, part of a wider cluster around Tewkesbury and Junction 9, M5. The area should be protected in the SLP for E(g)/B-Class uses.	B
Local Plan Policy EMP2 Rural Business Centres							
T2.1 (EMP2): Homedowns Achievement Park (Homedowns Farm, Ashchurch Rural)	1.20	A rural site surround by fields to the south, west and east, it consists of four low grade units and has constrained access via rural roads.	GW Ceramics, W M Motors, Quarry Clothing Co. Manufacturing, trade, motor repair. No strong links to Key Sectors (100)	• Parts of the site are at risk from surface water flooding • Trees onsite • Constrained access	There is modest internal expansion space in the south of the existing area.	Low grade employment area but does continue to serve a purpose accommodating a small group of local businesses. The area should be protected in the SLP for E(g)/B-Class uses.	D
T2.2 (EMP2): Newton Farm Business Park (Ashchurch Rural)	1.70	Small industrial estate comprising a converted and expanded farm, offering a number of average quality buildings and yards, prominently located off the A46, cluse to the other large Employment Areas of Tewkesbury.	Perfect Fabrications, Flowmix, Glenearn Plant Hire Engineering, construction No strong links to Key Sectors (100)	• Parts of the site are at risk from surface water flooding	The Area boundary includes at least part of a field to the south, of 0.77 ha at the junction of Loverose Way and Platinum Drive, which could allow some growth.	Small but active local employment area, particularly providing yards for some construction businesses which might struggle to find accommodation elsewhere. The area should be protected in the SLP for E(g)/B-Class uses.	C

Area Reference: Name	Area, ha	Employment Area Description	Summary of Major Occupiers, Key Sectors and Clusters (Occupancy Rate)	Area Constraints	Opportunities for redevelopment/ expansion	Recommendations	Site Grading
T2.3 (EMP2): Homelands Farm (Bishops Cleeve)	1.47	Active farm on the northern edge of Bishops Cleeve, adjacent to housing, off Cleeve Road. The site does not appear to accommodate any additional businesses, however.	-	• Parts of the site are at risk from surface water flooding • Trees onsite • Farm adjacent	An Outline planning application for a small scale 'green' commercial/ business park of up to 4,025 sqm was refused in 2012 due to being outside of the settlement boundary and lacking some information on highways impacts (App. No. 11/00663/OUT). Since the previous application was refused there has been no further attempt to develop E(g)/B-Class uses.	While there may be some commercial activity with the farm buildings, there is no evidence that the Area functions as a formal business park or industrial estate. It should therefore not be protected for E(g)/B-class uses in the SLP.	E
T2.4 (EMP2): Highfield Farm (Elmstone Hardwicke)	5.15	Small rural business park of some 40 workshops and smaller average quality industrial units, prominently located on the A38.	Red Earth Systems, New Leaf Upholstery and Design, Bankside Tackle, PB Safety Motor Repair, Manufacturing, Trade, Healthcare, Construction Occupancy in the existing Business Park is mixed but does include some Advanced Manufacturing businesses including Red Earth Systems (Aerospace), benefiting from strong A38 access. (100)	• Parts of the site are at risk from surface water flooding • Trees onsite	Identified expansion site to the south which is consented for a B2 unit of 2,045 sqm in the south east with additional premises proposed, in outline to the north and west which could total some 2,430 sqm. The developable site area is identified as 2.89 ha. This is considered further as an Employment Site for Tewkesbury.	Active local industrial estate, accommodating some high value uses and with plans for growth. The area should be protected in the SLP for E(g)/B-Class uses.	C
T2.5 (EMP2): Knightsbridge Business Centre (The Leigh)	1.57	A rural farm conversion comprising five terraced industrial/warehouse units to the rear of a farm, in a rural area close to the A4019 Knightsbridge Road east of Coombe Hill.	44 Music, Drive 90, Silicone Moulds Engineering, Construction, Trade, Light Fabrication Supports a diverse range of rural businesses but does not have strong links to Key Sectors. (100)	• Most of the site is in Flood Zones 2/3 • Parts of the site are at risk from surface water flooding • Trees onsite • Farm adjacent	Further expansion would require incursion into the surrounding countryside and areas of high Flood Risk.	Active rural industrial estate. It should be protected for E(g)/B-class uses in the SLP.	C
T2.6 (EMP2): Park Farm Industrial Estate (Gretton)	1.40	Small modern rural industrial estate, distant from settlements, that has seen recent small scale growth.	AerobatX, The Tile Barn, Fosse Fires, TDRPC (Shooting Range) Trade, Retail/Leisure Limited links to Key Sectors (90)	• Parts of the site are at risk from surface water flooding • Houses adjacent	Area has 1.35 ha of expansion land associated with it which is consented for 550 sqm of industrial/storage workspace. This is considered further as an Employment Site for Tewkesbury.	Small site, focused on trade and retail but is a useful source of smaller workspace in a rural area and which is seeing ongoing growth. It should be protected for E(g)/B-class uses in the SLP.	C

Area Reference: Name	Area, ha	Employment Area Description	Summary of Major Occupiers, Key Sectors and Clusters (Occupancy Rate)	Area Constraints	Opportunities for redevelopment/ expansion	Recommendations	Site Grading
T2.7 (EMP2): Highnam Business Centre (Highnam)	3.20	Rural business park, offering smaller modern offices at a road junction outside of Highnam.	Hexagon Software Group, Farr Physiotherapy, Orchard View Vets, Nails & Beauty by Natasha B Health, Digital, Professional Services Within a broader mix of services the Area accommodates some smaller Digital and Technologies companies. (100)	• Parts of the site are at risk from surface water flooding • Area includes Listed Buildings • Housing adjacent	Further expansion would require incursion into the surrounding countryside.	Active rural business park and particularly a key source of offices which are rarely found outside of the Gloucester and Cheltenham settlement areas. It should be protected for E(g)/B-class uses in the SLP.	C
T2.8 (EMP2): The Steadings (Maisemore)	0.90	High quality modern terraced offices in a dense rural business park, linked to a farm and wedding venue, access by narrow rural roads off the A417.	iLex Accountancy Services, Onward Agency, Ewatt Technology, Bexmedia Media, Financial Services, Mixed Professional Services A diverse cluster of Creative Industries, Professional and Business Services and Financial Services businesses, including start-ups. (100)	• Parts of the site are at risk from surface water flooding • Area includes Listed Buildings • Housing adjacent	Further expansion would require incursion into the surrounding countryside.	Active rural business park and particularly a key source of offices which are rarely found outside of the Gloucester and Cheltenham settlement areas. It should be protected for E(g)/B-class uses in the SLP.	C
T2.9 (EMP2): Orchard Industrial Estate (Toddington)	6.90	Small rural industrial estate, providing average quality small and mid-sized industrial and warehouse units at a main road junction.	Evesham Specialist Packaging, Obelix Systems, QCR Recycling Equipment, Travellers Finds inc. African Creations Waste Management, Packaging, Storage, Trade/Retail, Construction A diverse group of local businesses but with limited links to Key Sectors. (90)	• Parts of the site are at risk from surface water flooding	The triangular area of land to the south west, at the B4077/B4078 (3.81 ha) has a Hybrid Planning consent for: A) Full planning application for the erection of an industrial building of 8,625 sqm (GEA) B) Outline application for phase two for an industrial building providing up to 4,590 sqm (GEA) (App. No. 22/00968/FUL). The proposed space will allow the expansion of Bushell and Meadows which manufactures precision engineering products for the medical markets. It is considered further as an Employment Site.	Active local industrial estate. It should be protected for E(g)/B-class uses in the SLP. 3.81 ha to the south west now has consent for a large development for an Advanced Manufacturing company. This land should be included within the Employment Area.	C

Area Reference: Name	Area, ha	Employment Area Description	Summary of Major Occupiers, Key Sectors and Clusters (Occupancy Rate)	Area Constraints	Opportunities for redevelopment/ expansion	Recommendations	Site Grading
T2.10 (EMP2): Twigworth Court (Twigworth)	1.50	Historic brick built former farm buildings providing good quality offices and workshops in a tightly defined site on the edge of a settlement area.	The Cotswold Sewing School, Cheltenham Equine Vets, Kestrel Dental Studio, In Touch Therapies. Retail, Trade, Healthcare Primarily accommodates retail/wholesale and service businesses with limited links to the Key Sectors. (100)	• Housing adjacent • Northern areas are in Flood Zone 2 • Parts of the site are at risk from surface water flooding • Includes a Listed Building	There are plots of land within Twigworth Court which can be developed for extra buildings/units.	Buildings are mostly in retail/service use but still provide a useful source of modern offices and workshops which can meet a wide range of needs, especially for start-ups and micro firms. It should be protected for E(g)/B-class uses in the SLP.	C
T2.11 (EMP2): Brockeridge Farm Business Centre (Twyning)	4.50	Modern, low density rural office park offering 16 smaller, single storey offices in a courtyard development close to Junction 1, M50.	Delacour Maclaren, CSA Environmental, BM Aluminium, Mercian Group, Ruby Financial Financial Services, Professions Services (Waste and Environmental Focus) Key cluster of Financial Services and Professional and Business services companies, including administrative facilities for a number of larger engineering, waste and environmental companies. (100)	• Listed Building adjacent • Housing adjacent • Parts of the site are at risk from surface water flooding	Multiple consents in and around the area, including an Outline application for the extension of Brockeridge Business Park to provide for up to 33,329 sqm of B8, approved at appeal in June 2026 (App. No. 21/01498/OUT). Previous consented applications include: • Outline planning application for construction of 4,533 sqm of E(g)/B-Class development on 2.49 ha to the east of the existing Business Centre (App. No. 18/00368/OUT) • Construction of 834 sqm of business space (Class E) on land between the business centre and the pond. Reserved Matters consent, building on the above Outline consent (App. No. 21/00057/APP). These are considered further in the Employment Sites analysis.	The Business Centre is distant from the main settlements of the SLP Area. However, it still provides a high value cluster of offices in a prominent position on the strategic road network, serving a broader economy. It should be protected for E(g)/B-class uses in the SLP. With the most recent consents, the area will expand considerably to include B8 logistics uses and these allocated areas should also be recognised in the SLP.	B

Area Reference: Name	Area, ha	Employment Area Description	Summary of Major Occupiers, Key Sectors and Clusters (Occupancy Rate)	Area Constraints	Opportunities for redevelopment/ expansion	Recommendations	Site Grading
T2.12 (EMP2): Duddage Manor Business Park (Twyning)	1.00	Group of ten modern terraced industrial units in a rural site, to the rear of housing and close to Junction 1, M50.	Cool Concerns Aquamarine Chemicals Chemicals production, mixed manufacturing and engineering, training Comprises a modest range of manufacturing businesses, but most would not be considered Advanced Manufacturing. (100)	• Housing adjacent • Parts of the site are at risk from surface water flooding • Public Right of Way bounds the area in the west. • Trees onsite	The site has Outline consent for E(g), B2, B8 premises comprising six larger units and six smaller units (Application No. 21/01384/OUT), totalling 3,000 sqm on 1.13 ha west of the existing Business Park.	Active and accessible local industrial estate, with growth potential. Both the Area and the consented land should be protected for E(g)/B-class uses in the SLP.	C
T2.13 (EMP2): Isbourne Business Park (Winchcombe)	1.47	Small, older industrial estate mostly comprising smaller terraced units, in a rural edge of settlement location.	Rapport interiors, Glosfume, Geoff Cotswold Brewery Manufacturing (filtration systems), food production, trade, construction Includes at least one company which could be described as being in Advanced Manufacturing (Glosfume). Other companies are mostly in construction, trade and food production. (100)	• In Flood Zones 2/3 • Parts of the site are at risk from surface water flooding • Public Right of Way bounds the area in the west. • Trees onsite	Fully developed. Tightly bound by other uses, including woodland.	Active local industrial estate. It should be protected for E(g)/B-class uses in the SLP.	C
T2.14 (EMP2): Withytrees Farm (Winchcombe)	1.21	Several rows of average quality workshops in converted farm buildings, in a rural site.	Saxon Print, Embroidery and Design, Digital Scales Company Trade, Retail and Printing Limited linkages to Key Sectors (100)	• In Area of Outstanding Natural Beauty • Parts of the site are at risk from surface water flooding • Public Right of Way passes through the site.	Site is subject to an existing planning consent for refurbishment and partial redevelopment (App. No.11/00545/FUL) which has been at least partially implemented. 0.41 ha remains. This is considered further in the Employment sites analysis.	Active local industrial estate. It should be protected for E(g)/B-class uses in the SLP.	C
Total	**343.29**						

Source: BE Group, 2026

7.23 Together these 24 Employment Areas comprise 343.29 ha of primarily developed employment land. Where possible, all non E(g)/B-Class uses have been removed from the area boundaries. Where issues remain, these are highlighted in area recommendations.

7.24 T1.3 (EMP1): Gloucester Business Park, Brockworth is by far the biggest area at 106.7 ha, followed by T1.9 (EMP1): Tewkesbury Business Park (Tewkesbury) at 75.2 ha, T1.10 (EMP1): Ashchurch Business Park (Tewkesbury) at 39.0 ha and T1.1 (EMP1): Cleeve Business Park (Bishops Cleeve) at 32.4 ha. Together these three areas comprise nearly three quarters of the total stock of developed employment land. All other Areas are less than 21 ha in size, with an average area size of 4.50 ha.

7.25 Many areas include businesses which can be described as falling into one of the Key Sectors, however, areas which include more defined clusters of high value businesses include:

- T1.1 (EMP1): Cleeve Business Park (Bishops Cleeve) – Main occupier GE is a major Advanced Manufacturing facility, with an Aerospace specialism, for the SLP Area, linked to the larger aerospace cluster around Gloucestershire Airport. Ontic also has an Aerospace focus.
- T1.3 (EMP1): Gloucester Business Park, Brockworth – Includes the largest office park in the SLP Area which accommodates a range of regional and national firms with a focus on Financial Services. Also accommodates a cluster of large established firms in Advanced Manufacturing including Dowty (Aerospace) and TBS Engineering (battery production). The office component also includes administrative facilities for major defence companies including BAE Systems and Lockheed Martin.
- T1.5 (EMP1): Meteor Business Park (Churchdown / Staverton – Business Park has a key cluster of Advanced Manufacturing businesses, with an emphasis on Aerospace and Defence
- T1.6 (EMP1): Ashville Business Park (Churchdown / Staverton) – Includes major Advanced Manufacturing facilities for Safran, one of several facilities for this company in the Airport area. Several other high value companies in the area, e.g. Spectrum Medical.
- T1.7 (EMP1): Bamfurlong Technology Park (Churchdown / Staverton) – As

with other Employment Areas around the Airport, the Area accommodates several Advanced Manufacturing companies, with an Aerospace/Defence focus, most notably Dowty.

- T1.10 (EMP1): Ashchurch Business Park (Tewkesbury) – Includes one large Advanced Manufacturing business (Moog) with others spread throughout the area.
- T2.4 (EMP2): Highfield Farm (Elmstone Hardwicke) – Occupancy in the existing Business Park is mixed but does include some Advanced Manufacturing businesses including Red Earth Systems (Aerospace), benefiting from strong A38 access.
- T2.7 (EMP2): Highnam Business Centre (Highnam) – Within a broader mix of services the Area accommodates some smaller Digital and Technologies companies.
- T2.8 (EMP2): The Steadings (Maisemore) – A diverse cluster of Creative Industries, Professional and Business Services and Financial Services businesses, including start-ups.
- T2.11 (EMP2): Brockeridge Farm Business Centre (Twyning) – Key cluster of Financial Services and Professional and Business services companies, including administrative facilities for a number of larger engineering, waste and environmental companies.

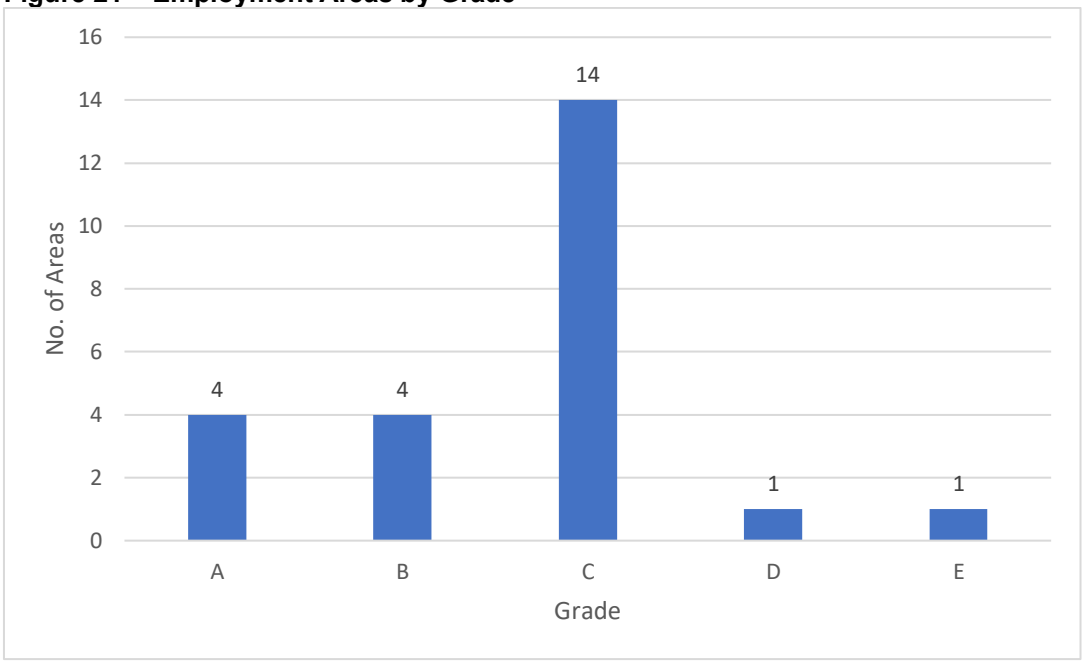
7.26 Within the areas, while there were many individual low grade premises, no location showed evidence of widespread dereliction across multiple premises while even old mills mostly remain in use. 22 of 24 areas (91.7 percent) are over 90 percent occupied.

7.27 The high occupancy rates and lack of widespread dereliction suggest that Tewkesbury does not have significant problems with surplus premises. Unlike in Gloucester and Cheltenham, no area was proposed for, or had been redeveloped for, housing.

7.28 As Figure 21 shows, 62.5 percent of the areas (15) were Graded C or D. This means they are active and successful employment locations, which should continue to be identified and protected for E(g)/B-Class uses in the SLP It also means that while they may accommodate some large employers, the bulk of the stock, in terms of

unit sizes, quality and location, primarily meets the needs local firms, frequently offering a mix of trade, industrial and warehouse units. Their economic influence is limited to within the boundaries of Tewkesbury (and linked parts of Cheltenham and Gloucester), and they are unlikely to attract the interest of inward investors unless that investor has a pre-existing need to locate to the borough.

Figure 21 – Employment Areas by Grade



Source: BE Group, 2026

7.29 Four areas were graded B, meaning that they would compete well across the sub-regional market place of the SLP Area and Gloucestershire for investment. These include T1.9 (EMP1): Tewkesbury Business Park (Tewkesbury) and T1.10 (EMP1): Ashchurch Business Park (Tewkesbury), larger areas but with a focus on local and sub-regional businesses. Four areas were Graded A, meaning that their offer was of a strategic scale and could compete with equivalent schemes across the South West (and West Midlands, South Wales). These are:

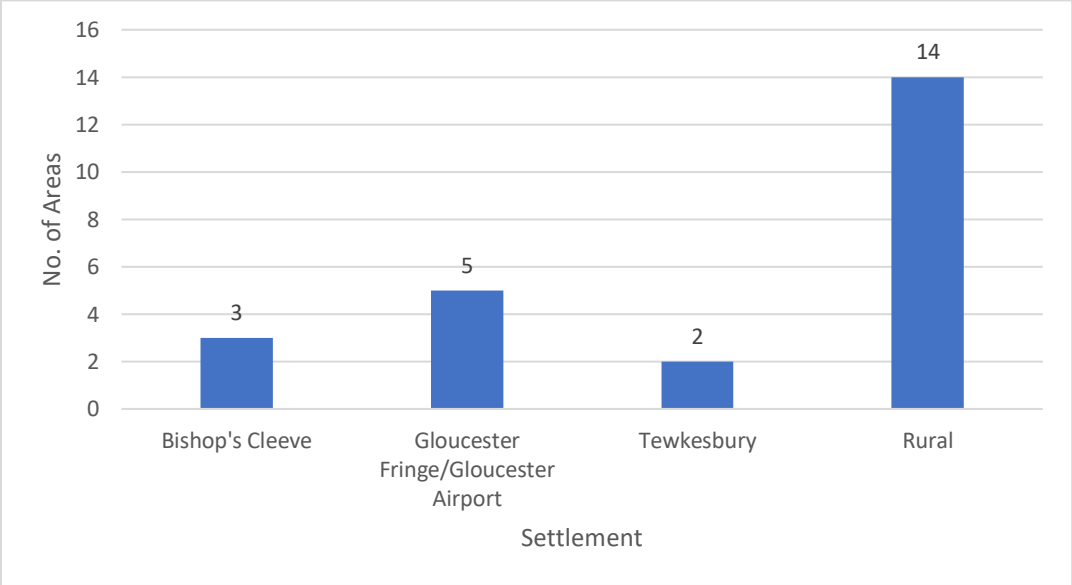
- T1.1 (EMP1): Cleeve Business Park (Bishops Cleeve) – Facilities for national/international Advanced Manufacturing businesses.
- T1.3 (EMP1): Gloucester Business Park, Brockworth – The largest mixed office/industrial/warehouse park in the SLP Area, accommodating a diverse range of national and international firms.
- T1.5 (EMP1): Meteor Business Park (Churchdown / Staverton) and T1.6 (EMP1): Ashville Business Park (Churchdown / Staverton) – Key Advanced

Manufacturing clusters associated with Gloucestershire Airport.

7.30 T2.3 (EMP2): Homelands Farm (Bishops Cleeve) no longer appears to be an active Employment Area, rather is a working farm. Accordingly it is Graded E.

7.31 As Figure 22 shows, geographically, 58.3 percent the Employment Areas (14) are spread across the rural areas of Tewkesbury in a range of locations, generally linking well to the main A and B roads. Five fall into the area around Gloucester and Gloucestershire Airport, which also links well to Cheltenham and form a significant cluster of national businesses and firms in Key Sectors, particularly Advanced Manufacturing. There are two areas in Tewkesbury town which are very large in the context of the settlement they adjoin. Three areas link to Bishops Cleeve, including the GE complex at Cleeve Business Park.

Figure 22 – Employment Areas by Settlement



Source: BE Group, 2026

7.32 Regeneration opportunities, aside from plots already identified as employment sites in the previous section, are limited, without expansion into the surrounding countryside. However, there are some small areas of underused or vacant land which could support brownfield development and growth:

- T1.2 (EMP1): Malvern View Business Park (Bishops Cleeve) - There is 2.37 ha of undeveloped scrubland to the north, accessible from Stella Way which could allow some growth, although it is close to housing

- T2.1 (EMP2): Homedowns Achievement Park (Homedowns Farm, Ashchurch Rural) – There is modest internal expansion space in the south of the existing area
- T2.2 (EMP2): Newton Farm Business Park (Ashchurch Rural) - The Area boundary includes at least part of a field to the south, of 0.77 ha at the junction of Loverose Way and Platinum Drive, which could allow some growth
- T2.10 (EMP2): Twigworth Court (Twigworth) – There are plots of land within Twigworth Court which can be developed for extra buildings/units
- T2.12 (EMP2): Duddage Manor Business Park (Twyning) – The site has Outline consent for E(g), B2, B8 premises comprising six larger units and six smaller units (Application No. 21/01384/OUT), totalling 3,000 sqm on 1.13 ha west of the existing Business Park.

Summary

Employment Land Supply

7.33 Including JCS Allocations, Local Plan allocations and other identified infill sites in major industrial estates gives a baseline employment land supply in Tewkesbury of 81.52 ha in 22 sites. An assessment of this supply, excluding land unlikely to be brought forward, proposed for alternative uses, or held for specific occupiers, along with the netting of sites, suggests a more realistic figure of 52.77 ha (net) or 221,791 sqm in 19 sites.

7.34 The three JCS allocations for Tewkesbury – Policy A1: Innsworth and Twigworth, Policy A2: South Churchdown; Policy A3: North Brockworth – could provide a net supply of 17.33 ha or 79,908 sqm of floorspace (36.0 percent of the total floorspace). In the case of Policy A1: Innsworth and Twigworth and Policy A3: North Brockworth there are at least Outline planning consents for the employment elements and development partners and/or marketing agents attached to the projects, giving some confidence that properties will ultimately be delivered. Policy A2: South Churchdown does not yet have clear delivery plans associated with it but remains available, on relatively unconstrained land adjacent to an established business park.

7.35 The majority of land is likely to support industrial and warehouse uses. Seven sites

totalling 44.85 ha might specifically support high value uses. 63.8 percent the supply is focused in settlements on the edge of Gloucester, around Gloucestershire Airport as well as at Gloucester Business Park/Brockworth. This is key as there is no presently allocated employment land available within the city boundary.

Employment Areas Analysis

7.36 24 Employment Areas have been assessed and graded. 62.5 percent of the areas (15) were Graded C or D. This means they are active and successful employment locations, which should continue to be identified and protected for E(g)/B-Class uses in the SLP It also means that while they may accommodate some large employers, the bulk of the stock, in terms of unit sizes, quality and location, primarily meets the needs local firms, frequently offering a mix of trade, industrial and warehouse units. Their economic influence is limited to within the boundaries of Tewkesbury (and linked parts of Cheltenham and Gloucester), and they are unlikely to attract the interest of inward investors unless that investor has a pre-existing need to locate to the borough.

7.37 Four areas were graded B, meaning that they would compete well across the sub-regional market place of the SLP Area and Gloucestershire for investment. These include T1.9 (EMP1): Tewkesbury Business Park (Tewkesbury) and T1.10 (EMP1): Ashchurch Business Park (Tewkesbury), larger areas but with a focus on local and sub-regional businesses. Four areas were Graded A, meaning that their offer was of a strategic scale and could compete with equivalent schemes across the South West (and West Midlands, South Wales).

7.38 T2.3 (EMP2): Homelands Farm (Bishops Cleeve) no longer appears to be an active Employment Area, rather is a working farm. Accordingly it is Graded E.

7.39 Most of the existing employment areas are well occupied, with no large areas of void premises, and of average quality but do offer a modest number of opportunities for infill or redevelopment within larger industrial estates and business parks. Areas are a mixture of industrial estates, of varying sizes, some including elements of offices.

8.0 FURTHER GROWTH OPPORTUNITIES

Introduction

8.1 This section considers other employment opportunity sites which could be adopted in the new SLP, as required and as judged appropriate by other planning factors, to meet the needs identified in the HENA. Any such provision would be additional to the realistic supply of existing employment land identified in Sections 5.0-7.0.

8.2 The Further Growth Opportunities comprise employment candidate sites set out in the Cheltenham, Gloucester and Tewkesbury Housing and Economic Land Availability Assessment (HELAA) (2025) and informed by a Call for Sites exercise.

Assessment

8.3 The HELAA reviewed some 57 sites in Cheltenham, 46 in Gloucester and 279 sites in Tewkesbury. However, many of those sites will only be suitable for housing, or other non E(g)/B-Class uses, and/or significantly constrained and/or lacking appropriate accessibility. It is not purpose of this Study to repeat the HELAA exercise already completed and accordingly, in discussions the three Councils identified 40 HELAA sites which represented realistic options for E(g)/B-Class development, and which are reviewed further here. Seven of these are in Cheltenham and 33 in Tewkesbury. None were identified for Gloucester.

8.4 The 40 relevant sites were appraised against their high-level constraints (accessibility, stated physical issues, etc.) informed by the HELAA analyses of each site; their ‘fit’ with identified market demand/ability to fill a defined supply gap and potential ability to deliver premises within the SLP period. Based on how well the site performs against these criteria, it is graded A-E. Grades and resulting recommendations are set out in Table 35. The results of the site review are outlined in Table 36. Relevant sites are mapped in Appendix 13.

Table 35 – Grades A to E Definitions

Grade	Definition	Recommendation
A	Site has no large-scale constraints It is well placed, and of a size, to meet strategic demand and attract inward investment Site is in developer control, or has other strong indications of deliverability early in the Plan Period	Subject to other considerations, site represents a strong candidate for inclusion in the SLP to meet strategic needs for E(g)/B2/B8 uses, and attract inward investment
B	Site has no large-scale constraints It is well placed, and of a size, to meet local demand It meets defined market needs in a relevant geographic area Site is in developer control, or has other indications of deliverability early in the Plan Period	Subject to other considerations, site represents a strong candidate for inclusion in the SLP to meet local needs for E(g)/B2/B8 uses
C	Few/moderate site constraints Site could meet demand but: 1. Site would likely see pressure for other uses or a mixed use scheme, or 2. Size and position mean that it is most likely to support the growth/relocation of a single firm	Consider for allocation to meet needs. However: 1. Greater conformation that the site will be developed for employment uses, or an acceptable mix of uses would be needed 2. If take up tied to a single firm, it may be preferable to review applications for growth of that firm on a case by case basis through the planning system
D	Site constraints What demand exists primarily for lower value uses – waste, open storage, etc. Conversely, higher demand but likely insufficient to overcome site constraints. Moderate evidence that B-Class uses would be deliverable here in Plan Period	Low priority for B-Class allocation. Subject to further review may suit other uses.
E	Significant site constraints Location and size offer negligible scope for meeting local demand or supply gaps Significant barriers to delivery	Do not allocate for E(g)/B2/B8 /B2/B8 uses.

Source: BE Group, 2026

Table 36 – HELAA, Call for Sites - Site Review Summaries

Study Ref. (HELAA Ref.)	Site Name	Settlement	Size, ha (Estimated Net Size, ha*)	Employment Capacity, sqm (At 4,000 sqm/hectare, on the Net Size)	Constraints	Market 'Fit'/Supply Gap Filled	Deliverability	Grade
Cheltenham								
C3.1 (S163)	Golden Valley West	Cheltenham (also in Tewkesbury)	127.67	Comprises the JCS allocation A7: West Cheltenham which is already reviewed as part of the existing employment land supply in Section 5.0. It is not also reviewed here to avoid duplication.				
C3.2 (S102)	Land at Hunting Butts (east)	Cheltenham	11.64 (8.73)	34,920	• In Green Belt (It forms part of a wider Strategic Segment of Land which was identified in the JCS Green Belt Review 2011 (NE18) which, overall, was judged to make a significant contribution towards Green Belt purposes) • Listed Buildings within 250 metres • Public Rights of Way cross the site • In the zone of influence for Cotswold Beechwoods Special Area of Conservation (SAC) • Trees onsite • Includes areas of land at risk from	Sites C3.2-C3.4 form a common market area adjacent to Cheltenham Racecourse and are considered together. The land is well positioned on the A435 Evesham Road running north out of Cheltenham. As mentioned, it is adjacent to the Racecourse but there is no evidence that this use generates an immediate need for E(g)/B-Class accommodation. Rather Racecourses tend to generate needs for complimentary leisure, retail and medical/veterinary uses. Despite being on a strategic road, these sites do not link well to the existing Employment Areas of Cheltenham. The nearest existing relevant use is GE Aerospace to the north at	Other than being in Green Belt there are few physical constraints to development here. A lot of the land provides overflow parking for the Racecourse so it would need to be confirmed that its development would not inhibit Racecourse operations. It is also unlikely that the Racecourse would support a large scale industrial or warehouse development here so offices would be preferred. As was discussed, offices are difficult to viably deliver. It is also likely that there will be pressure for housing development here. In this regard it is noted that site C3.4: Land at Hunting Butts Farm was subject to a refused Outline planning application for 135 dwellings in 2011 (App. No. 11/00257/OUT).	C

Study Ref. (HELAA Ref.)	Site Name	Settlement	Size, ha (Estimated Net Size, ha*)	Employment Capacity, sqm (At 4,000 sqm/hectare, on the Net Size)	Constraints	Market 'Fit'/Supply Gap Filled	Deliverability	Grade
					surface water flooding.	Bishops Cleeve, but that facility has further internal expansion land while HELAA options have also been put forward that would more directly serve that town. The bulk of Cheltenham's existing Employment Areas, including town centre offices, link more to the A4019 Tewkesbury Road extending north west to J10, M5. Developments on this corridor might better support the Cheltenham market. If an employment scheme was progressed here, it would suit good quality offices, supporting the financial and professional sectors, taking advantage of the prestigious location by the Racecourse. However, such offices can be difficult to viably deliver while the West Cheltenham development is expected to meet a lot of office demand.		
C3.3 (S011)	The Paddocks, Swindon Lane	Cheltenham	1.79 (1.52)	6,080	• In Green Belt (It forms part of a wider Strategic Segment of Land which was identified in the JCS Green Belt Review 2011 (NE18) which, overall, was judged to make a significant contribution towards Green Belt purposes) • House onsite (Subject to a proposal for the demolition of the existing property and the construction of two 2 storey dwellings – The planning application was refused at Appeal (App. No. 21/02505/FUL)) • Trees onsite • In the zone of influence for Cotswold Beechwoods			C

Study Ref. (HELAA Ref.)	Site Name	Settlement	Size, ha (Estimated Net Size, ha*)	Employment Capacity, sqm (At 4,000 sqm/hectare, on the Net Size)	Constraints	Market 'Fit'/Supply Gap Filled	Deliverability	Grade
					Special Area of Conservation (SAC) • Listed Buildings within 250 metres • Includes areas of land at risk from surface water flooding.			
C3.4 (S175)	Land at Hunting Butts Farm	Cheltenham	7.90 (5.93)	23,720	• In Green Belt (It forms part of a wider Strategic Segment of Land which was identified in the JCS Green Belt Review 2011 (NE18) which, overall, was judged to make a significant contribution towards Green Belt purposes) • Includes an area of woodland in the south west • Houses onsite • Listed Buildings within 250 metres • Includes areas of land at risk from surface water flooding.			C

Study Ref. (HELAA Ref.)	Site Name	Settlement	Size, ha (Estimated Net Size, ha*)	Employment Capacity, sqm (At 4,000 sqm/hectare, on the Net Size)	Constraints	Market 'Fit'/Supply Gap Filled	Deliverability	Grade
C3.5 (S151)	Land at Morris Hill	North Cheltenham	40.59 (24.35)	97,400	• In Green Belt (It forms part of a wider Strategic Segment of Land which was identified in the JCS Green Belt Review 2011 (NE18) which, overall, was judged to make a significant contribution towards Green Belt purposes) • Electricity pylons cross the site • In the zone of influence for Cotswold Beechwoods Special Area of Conservation (SAC) • Listed Buildings within 250 metres • Public Rights of Way cross the site • Trees onsite • A small stream crosses the site • Includes areas of land at risk from surface water flooding.	This land is adjacent to a mostly residential area and is located away from the main A-Roads including the A435 Evesham Road, it thus has less prominence than options suggested to the east. While not far from the existing Employment Areas of North West Cheltenham, which fall onto the A4019 Tewkesbury Road it is still separated from these uses by housing. Sites located on the A4019 will be preferred by developers.	In addition to the Green Belt designation, transport and access are likely to be significant barriers to a commercial development. The site is presently accessed by narrow residential roads such as Swindon Lane and Hyde Lane. It is unlikely that these could support an extensive uplift in HGV traffic. There is also likely to be pressure for housing here. In this regard it is noted that the site was subject to a request for a screening opinion under the EIA Regulations for a development of around 750 dwellings in June 2026 (App. No. 26/00833/SCREEN).	D

Study Ref. (HELAA Ref.)	Site Name	Settlement	Size, ha (Estimated Net Size, ha*)	Employment Capacity, sqm (At 4,000 sqm/hectare, on the Net Size)	Constraints	Market 'Fit'/Supply Gap Filled	Deliverability	Grade
C3.6 (S152)	Land at Hyde Farm (East and West)	North Cheltenham	86.41 (51.85)	207,400	• In Green Belt (It forms part of a wider Strategic Segment of Land which was identified in the JCS Green Belt Review 2011 (NE18) which, overall, was judged to make a significant contribution towards Green Belt purposes) • Electricity pylons cross the site • In the zone of influence for Cotswold Beechwoods Special Area of Conservation (SAC) • Listed Buildings within 250 metres • Public Rights of Way cross the site • Housing/farms onsite and adjacent • Includes areas of land at risk from surface water flooding.	The land is well positioned on the A435 Evesham Road running north out of Cheltenham. As with other sites in this area it is close to the Racecourse but there is no evidence that this use generates an immediate need for E(g)/B-Class accommodation. Rather Racecourses tend to generate needs for complimentary leisure, retail and medical/veterinary uses. Despite being on a strategic road, this site does not link well to the existing Employment Areas of Cheltenham. The nearest existing relevant use is GE Aerospace to the north at Bishops Cleeve, but that facility has further internal expansion land while HELAA options have also been put forward that would more directly serve that town. The bulk of Cheltenham's existing Employment Areas, including town centre offices, link more to the	Other than being in Green Belt there are few physical constraints to development here. Commercial development should focus on the A435 frontage, which is accessible, land further west is presently accessed by the narrow Hyde Lane so would not suit a use which generates extensive HGV traffic. As with other land it is unlikely that the Racecourse would support a large scale industrial or warehouse development here so offices would be preferred. As was discussed, offices are difficult to viably deliver. It is also likely that there will be pressure for housing development here.	C

Study Ref. (HELAA Ref.)	Site Name	Settlement	Size, ha (Estimated Net Size, ha*)	Employment Capacity, sqm (At 4,000 sqm/hectare, on the Net Size)	Constraints	Market 'Fit'/Supply Gap Filled	Deliverability	Grade
						A4019 Tewkesbury Road extending north west to J10, M5. Developments on this corridor might better support the Cheltenham market. If an employment scheme was progressed here, it would suit good quality offices, supporting the financial and professional sectors, taking advantage of the prestigious location by the Racecourse. However, such offices can be difficult to viably deliver while the West Cheltenham development is expected to meet a lot of office demand.		
C3.7 (S166)	Elms Park (also in Tewkesbury)	Cheltenham (also in Tewkesbury)	214 .0	• Comprises the JCS allocation A4: North West Cheltenham which is already reviewed as part of the existing employment land supply in Section 5.0. It is not also reviewed here to avoid duplication.				
Tewkesbury								
T3.1 (OXE003)	Tewkesbury Garden Town (Garden Community) Strategic Allocation	Tewkesbury	100.0 (20 ha, assumed initial development in the SLP period)	80,000	• Wormington to Treaddow gas pipeline runs across the south of the site. Wormington to Tirley gas pipeline runs through SE corner of site.	Promotional material is now being created to market the site for Advanced Manufacturing uses across a regional catchment. At present the site is in an isolated rural location off the A435 but that would	The Garden Community is proposed for 10,000 homes and 100 ha of employment land, to be delivered in a period extending beyond the SLP period. The wider area is under three ownerships – Homes England and Cromwell (West) and Hall	B (Increasing to A if at direct M5 link

Study Ref. (HELAA Ref.)	Site Name	Settlement	Size, ha (Estimated Net Size, ha*)	Employment Capacity, sqm (At 4,000 sqm/hectare, on the Net Size)	Constraints	Market 'Fit'/Supply Gap Filled	Deliverability	Grade
					• Farms on site • Trees and areas of woodland onsite, includes some TPOs • Includes some small streams in Flood Zones 2/3 • Public Right of Way passes through the site • Includes areas of land at risk from surface water flooding • Public Rights of Way Cross the site • Listed buildings within 500 metres	clearly change if a large housing scheme is delivered here and strategic access is improved. A growing population in the area would generate local demand for employment premises, albeit likely for a mix of uses, not just Advanced Manufacturing. Local demand is generally for smaller offices and industrial/warehouse properties of less than 5,000 sqm. As is discussed adjacent, it is likely that an employment site of not more than 20 ha will be delivered in the SLP period and not till later in that period. This gives time for other developments in the SLP Area to progress, particularly West Cheltenham and build up a critical mass of higher value companies which this site could then capitalise upon. Strategic scale logistics or manufacturing is less likely here unless a direct	(East). Homes England are leading on delivery. All are subject to a promotion agreement. Various studies are underway to allow an initial scheme of 3,000 homes and promote a site allocation. A key delivery issue is strategic transport access which will determine what can be delivered here. Options being considered include a new M5 Junction which is subject to National government funding. However, delivery parties are also considering a smaller employment site of 10-20 ha which could be developed later in the SLP period (2035+) on smaller scale transport interventions. The delivery of this will be subject to assessments of traffic flow along the A46, to confirm what elements of the project can be supported from this route. Also what additional junctions could be provided on the A435. There are also two high pressure pipelines which run diagonally through the site, South West to North East. Homes England, and	can be delivered.)

Study Ref. (HELAA Ref.)	Site Name	Settlement	Size, ha (Estimated Net Size, ha*)	Employment Capacity, sqm (At 4,000 sqm/hectare, on the Net Size)	Constraints	Market 'Fit'/Supply Gap Filled	Deliverability	Grade
						M5 link can be delivered to avoid HGV trips north through Tewkesbury. It was suggested by stakeholders that such uses could be delivered on sites in the south west of the wider area, currently occupied by solar farms.	associated consultants, had discussions with the Health and Safety Executive which identify an Inner Impact Zone which cannot be developed for housing but could be developed for E(g)/B-Class businesses with up to 100 employees and in buildings of no more than 3 storeys. It is therefore suggested that this could area could be used to provide a linear employment area extending from the new local centres of the Community, which would accommodate smaller offices/workspace, out to larger units on the edges (to minimise HGV traffic through the settlement). Overall, their remain uncertainties on delivery but the scheme is being progressed under Homes England leadership. There are also ongoing discussions with the Ministry of Housing, Communities and Local Government to create a Development Corporation (Devco) for the SLP Area. This would be a specialised, government-established entity tasked with driving urban regeneration,	

Study Ref. (HELAA Ref.)	Site Name	Settlement	Size, ha (Estimated Net Size, ha*)	Employment Capacity, sqm (At 4,000 sqm/hectare, on the Net Size)	Constraints	Market 'Fit'/Supply Gap Filled	Deliverability	Grade
							delivering infrastructure, and building new settlements for the sub-region	
T3.2/T3.3 (CHU015/ CHU035)	Parton Farm/ Evergreen Nurseries, Parton Road (Function as a single site)	Land West of Gloucestershire Airport	31.81 (19.09)	76,360	• Site Area reduced from 36.78 ha to exclude land in Flood Zone 3. This includes land associated with Norman's Brook • In Green Belt • Noise from Airport • Lies In the zone of influence for Cotswold Commons and Beechwoods Special Area of Conservation (SAC) • Public Right of Way passes through the site • Housing within the site and adjacent • Trees onsite	Site links to the Airport employment cluster to the east along the B4063 Cheltenham Road East. Bamfurlong Industrial Park, Ashville Business Park and particularly Meteor Business Park, are key local centres for Advanced Manufacturing with specialisms in Aerospace and Defence, including companies such as Actemium ICS, Safran and Ontic Engineering & Manufacturing. More generally the Airport area is identified by stakeholders as a key focus for inward investment and market interest, particularly for industrial and warehouse units of up to 5,000 sqm, building on the existing local cluster. This site, particularly northern portions of it link well to that cluster and could build upon it.	Allowances will need to be made for flood risk and adjacent housing, but this site is large enough to allow for this and still provide a sizable and likely desirable development plot, particularly if access from the north onto the B4063 Cheltenham Road East can be secured. Its location means there may still be some pressure for housing here though.	A

Study Ref. (HELAA Ref.)	Site Name	Settlement	Size, ha (Estimated Net Size, ha*)	Employment Capacity, sqm (At 4,000 sqm/hectare, on the Net Size)	Constraints	Market 'Fit'/Supply Gap Filled	Deliverability	Grade
T3.4 (STA020)	Hayden Lane	Cheltenham	91.81 (55.09)	220,360	• In Green Belt • Trees onsite • Homes and farms in the site and adjacent • Water treatment works adjacent • Multiple ownershipd • Includes land in Flood Zones 2/3 • Public Rights of Way cross the site • Includes areas of land at risk from surface water flooding.	Site links to JCS Site A7: West Cheltenham to the east where development is progressing for a mixed use scheme including 77,871 sqm of E(g) class offices, research and development and light industry, commencing with a three story Innovation Centre (The National Cyber Innovation Centre) of 15,245 sqm. Focused on Cyber Industries the new facilities will accommodate a diverse range of companies, linked to Digital and Technologies and overlapping with Defence, other service sectors and likely Advanced Manufacturing. Amongst other things, this represents the most significant development of offices in the SLP Area and good demand for what is proposed, is reported. Assuming a large scale development is progressed in West	Site constraints will require some netting of land but should still leave a sizable site for development. There are a number of ways the site could be accessed but a direct assess east to West Cheltenham would be most desirable to link up the sites and also give quick access into Cheltenham. Large portions of the site are owned by commercial bodies such as Midland Land Portfolio who will be looking to support a viable development here.	A

Study Ref. (HELAA Ref.)	Site Name	Settlement	Size, ha (Estimated Net Size, ha*)	Employment Capacity, sqm (At 4,000 sqm/hectare, on the Net Size)	Constraints	Market 'Fit'/Supply Gap Filled	Deliverability	Grade
						Cheltenham, this land could support a further phase of development, building on the Cyber Cluster that has been delivered and providing space for further growth. Given the scale of accommodation which is still to be delivered in West Cheltenham it is questionable if this land will be needed in the SLP period but could be required over the longer term.		
T3.5 (CHU039)	Land at Gloucestershire Airport	Gloucestershire Airport	15.40 (11.55)	46,200	• Lies In the zone of influence for Cotswold Commons and Beechwoods Special Area of Conservation (SAC) • Noise from airport • Includes Airport Infrastructure • Includes areas of land at risk from surface water flooding.	Site falls between Bamfurlong Industrial Park and particularly Meteor Business Park, which are key local centres for Advanced Manufacturing with specialisms in Aerospace and Defence, including companies such as Actemium ICS, Safran and Ontic Engineering and Manufacturing. It includes 5.9 ha of land adjacent to Bamfurlong Industrial Park which has Outline Consent for the 30,000 sqm CGX Business Park (App. No.	The land is flat and largely unconstrained, with and an Outline consent establishing the principle of E(g)/B-Class development on part of the site. It includes part of one of the Airport Runways and some of the taxiway so it would need to be confirmed that this is infrastructure that can be redeveloped without negatively impacting on wider Airport operations. Delivery will also depend on if, and to whom, Gloucester City Council and Cheltenham Borough Council sell the Airport to although at the time of writing this land remains under public sector control,	A

Study Ref. (HELAA Ref.)	Site Name	Settlement	Size, ha (Estimated Net Size, ha*)	Employment Capacity, sqm (At 4,000 sqm/hectare, on the Net Size)	Constraints	Market 'Fit'/Supply Gap Filled	Deliverability	Grade
						20/00758/FUL). An access road is now in place here and the site is on the market, for design and build opportunities. It is understood to be attracting interest. More generally the Airport area is identified by stakeholders as a key focus for inward investment and market interest, particularly for industrial and warehouse units of up to 5,000 sqm, building on the existing local cluster.	allowing these organisations to support and guide development here.	
T3.6 (STAV012)	Land East of Bamfurlong Lane	Staverton	4.36 (3.27)	13,080	• Lies In the zone of influence for Cotswold Commons and Beechwoods Special Area of Conservation (SAC) • Noise from airport • In Green Belt • Trees onsite • Gypsey and traveller site, and another residential park, adjacent • Hatherley Brook runs through the	Site falls to the rear of Bamfurlong Industrial Park and links with the wider employment cluster Bamfurlong Industrial Park, Ashville Business Park and particularly Meteor Business Park, which are key local centres for Advanced Manufacturing with specialisms in Aerospace and Defence, including companies such as Actemium ICS, Safran and Ontic Engineering & Manufacturing. More	Site has some constraints but generally provides a regularly shaped and accessible development plot close to an established employment cluster. It is a comparatively small site though so could only support modest local growth here compared to other options.	B

Study Ref. (HELAA Ref.)	Site Name	Settlement	Size, ha (Estimated Net Size, ha*)	Employment Capacity, sqm (At 4,000 sqm/hectare, on the Net Size)	Constraints	Market 'Fit'/Supply Gap Filled	Deliverability	Grade
					site, Public Right of Way follows this • Includes areas of land at risk from surface water flooding.	generally the Airport area is identified by stakeholders as a key focus for inward investment and market interest, particularly for industrial and warehouse units of up to 5,000 sqm, building on the existing local cluster. This site is less prominent within this cluster than other options however and would likely be less favoured by developers, particularly given the nearby residential uses.		
T3.7/ T3.8 (ELM011/ ELM003)	Land NW of Junction 10 of M5 at Hardwicke/ Stanboro Nurseries (Function as a single site)	Hardwicke	87.42 (52.45)	209,800	• Pylons and National Grid power line cross the north western part of the site. • Includes land in Flood Zones 2/3 • Listed Buildings within 500 metres • Lies In the zone of influence for Cotswold Commons and Beechwoods Special Area of Conservation (SAC)	Land sits at a very prominent position directly on J10, M5 on the A4019 Tewkesbury Road into Cheltenham. A new Motorway slip road is under development, which will take up some of the site, which will further improve accessibility. Sites in this location are amongst the most accessible options and the size of this site would make it desirable for uses which require direct M5 access, mostly likely	Deliverability will depend on being able to secure appropriate access here without affecting the new M5 slip. If that can be agreed, then a large developable site could be delivered. It should be noted that uses here will likely generate extensive HGV traffic although that can move directly onto the M5. The bulk of the land is owned by Cheltenham Borough Council so the public sector would be in a position to lead on and support delivery. It is understood that land here has previously been	A

Study Ref. (HELAA Ref.)	Site Name	Settlement	Size, ha (Estimated Net Size, ha*)	Employment Capacity, sqm (At 4,000 sqm/hectare, on the Net Size)	Constraints	Market 'Fit'/Supply Gap Filled	Deliverability	Grade
					• Public Rights of Way cross the site • Homes and farms on main road frontage • Trees onsite • Includes areas of land at risk from surface water flooding.	logistics for which there remains good regional demand but also Key Sectors including Advanced Manufacturing and defence, also reflecting the relative proximity of the North West and West Cheltenham developments (the latter will likely be a focus for office based development). The local demand is for industrial/warehouse properties of up to 5,000 sqm but regional/national requirements will likely be for larger properties of 10,000 sqm+.	considered for a waste depot, but it is suggested that this would not be a productive use of such a prominent site.	
T3.9 (UCK010)	Land North East of J10, M5	Uckington	9.44 (7.08)	28,320	• In Green Belt • Includes some Grade 1 Agricultural land • Trees on site, inc. some TPOs • Lies In the zone of influence for Cotswold Commons and Beechwoods Special Area of Conservation (SAC)	Land sits at a very prominent position directly on J10, M5 on the A4019 Tewkesbury Road into Cheltenham. A new Motorway slip road is under development, which will take up some of the site, which will further improve accessibility. Sites in this location are amongst the most accessible options and would be desirable for	A portion of this site is under development for a new M5 Slip Road. It is not clear what net developable area will remain once that is complete. It is assumed this will divide the site in two and potentially render one half undevelopable. Given this and the likelihood that this site would accommodate larger occupiers it would be preferable to maximise the net developable area here by	B

Study Ref. (HELAA Ref.)	Site Name	Settlement	Size, ha (Estimated Net Size, ha*)	Employment Capacity, sqm (At 4,000 sqm/hectare, on the Net Size)	Constraints	Market 'Fit'/Supply Gap Filled	Deliverability	Grade
					• Listed Buildings within 500 metres • Public Right of Way passes through the site • Gypsey and Traveller site adjacent • Houses in area, on main road frontage • Includes areas of land at risk from surface water flooding.	logistics for which there remains good regional demand but also Key Sectors including Advanced Manufacturing and defence, also reflecting the relative proximity of the North West and West Cheltenham developments (the latter will likely be a focus for office based development). The local demand is for industrial/warehouse properties of up to 5,000 sqm but regional/national requirements will likely be for larger properties of 10,000 sqm+. Such units will need a much larger plot of land then the 7-9 ha available here, meaning that this site will need to be linked to other adjacent ones (discussed adjacent).	linking this site with T3.10: Barn Farm to the north. This would require development passing through the Gypsey and Traveller site which separates them. Even with T3.10 however, this site would likely only be large enough to accommodate more local scale investments.	
T3.10 (ELM008)	Barn Farm	Elmestone Hardwicke	5.88 (4.41)	17,640	• In Green Belt • Trees on site, inc. some TPOs • Lies In the zone of influence for Cotswold Commons and	Wider area is in a very prominent position directly on J10, M5 on the A4019 Tewkesbury Road into Cheltenham (although this site is away from the road, see adjacent). A new	This site lacks access to the A4019 Tewkesbury Road and to render it developable a new road would need to be provided south, through the Gypsy and Traveller Site and T3.9: Land North East of J10, M5. T3.9 and T3.10 would	B (Subject to securing access

Study Ref. (HELAA Ref.)	Site Name	Settlement	Size, ha (Estimated Net Size, ha*)	Employment Capacity, sqm (At 4,000 sqm/hectare, on the Net Size)	Constraints	Market 'Fit'/Supply Gap Filled	Deliverability	Grade
					Beechwoods Special Area of Conservation (SAC) • Listed Buildings within 500 metres • Gypsey and Traveller site adjacent • Includes areas of land at risk from surface water flooding.	Motorway slip road is under development, to the south, which will further improve accessibility. Sites in this location are amongst the most accessible options and would be desirable for logistics for which there remains good regional demand but also Key Sectors including Advanced Manufacturing and defence, also reflecting the relative proximity of the North West and West Cheltenham developments (the latter will likely be a focus for office based development). The local demand is for industrial/warehouse properties of up to 5,000 sqm but regional/national requirements will likely be for larger properties of 10,000 sqm+. Such units will need a much larger plot of land then the 4-5 ha available here, meaning that this site will need to be linked to other	thus need to be developed together. This would also provide a larger net developable area which would allow the location to meet larger B2/B8 requirements. Even with T3.9 however, this site would likely only be large enough to accommodate more local scale investments. Site T3.10 is owned by Cheltenham Borough Council allowing the public sector to support and push forward development.	through other land, E if this cannot be provided))

Study Ref. (HELAA Ref.)	Site Name	Settlement	Size, ha (Estimated Net Size, ha*)	Employment Capacity, sqm (At 4,000 sqm/hectare, on the Net Size)	Constraints	Market 'Fit'/Supply Gap Filled	Deliverability	Grade
						adjacent ones (discussed adjacent).		
T3.11 (BOD014)	Land at Butlers Court	Boddington	35.73 (21.44)	85,760	• In Green Belt • The bulk of the north and centre of the site is in Flood Zones 2 and 3. Site area reduced from 65.87 ha to exclude land in Flood Zone 3 • Listed Buildings within 500 metres • Lies In the zone of influence for Cotswold Commons and Beechwoods Special Area of Conservation (SAC). • Trees onsite (woodland in north west) • Electricity pylons cross the site • Farms and houses in the area and on the northern boundary • Includes areas of land at risk from surface water flooding.	Wider area is in a very prominent position directly on J10, M5 on the A4019 Tewkesbury Road into Cheltenham (although this site is away from the road, see adjacent). A new Motorway slip road is under development to the north which will further improve accessibility. Sites in this location are amongst the most accessible options and the size of this site would make it desirable for uses which require direct M5 access, mostly likely logistics for which there remains good regional demand but also Key Sectors including Advanced Manufacturing and defence, also reflecting the relative proximity of the North West and West Cheltenham developments (the latter will likely be a focus for office based development). The local	The bulk of the land in the north and centre of the site, which is closest to the A4019 Tewkesbury Road and J10, M5 is in Flood Zones 2/3. Much, although not all, of the frontage with the A4019 is blocked by a row of houses. Land further south, which will be less desirable to developers, is less constrained but is accessed by Withybridge Lane a narrow road which may not be able to support extensive HGV traffic. Thus this site will require more extensive mitigation and investment to deliver, compared to other options in the area, and will be a low priority for developers.	D

Study Ref. (HELAA Ref.)	Site Name	Settlement	Size, ha (Estimated Net Size, ha*)	Employment Capacity, sqm (At 4,000 sqm/hectare, on the Net Size)	Constraints	Market 'Fit'/Supply Gap Filled	Deliverability	Grade
						demand is for industrial/warehouse properties of up to 5,000 sqm but regional/national requirements will likely be for larger properties of 10,000 sqm+.		
T3.12 (BOD013D)	Land around Boddington (Site D)	Boddington	90.89 (54.53)	218,120	• Electricity pylons cross the site • In Green Belt • Includes land In Flood Zones 2/3 associated with the River Chelt in the north west • Housing and farms adjacent • Listed Buildings within 500 metres • Trees and woodland in the area • Includes Grade 2 Agricultural Land • Public Rights of Way cross the site • Lies In the zone of influence for Cotswold Commons and Beechwoods Special Area of Conservation (SAC)	Land sits at a very prominent position directly on J10, M5 on the A4019 Tewkesbury Road into Cheltenham. A new Motorway slip road is under development, to the north which will further improve accessibility. Sites in this location are amongst the most accessible options and the size of this site would make it desirable for uses which require direct M5 access, mostly likely logistics for which there remains good regional demand but also Key Sectors including Advanced Manufacturing and defence, also reflecting the relative proximity of the North West and West Cheltenham developments (the latter will likely be a focus for	Removing land in Flood Zone 3 will impact on the net developable area but leaves a sizable site in the east, including an area of access onto the A4019 Tewkesbury Road. Bridging of the River Chelt would also be required to open up the south of the site. Assuming this can be viably provided it would deliver a large opportunity site The site is owned by developer Robert Hitchens.	A

Study Ref. (HELAA Ref.)	Site Name	Settlement	Size, ha (Estimated Net Size, ha*)	Employment Capacity, sqm (At 4,000 sqm/hectare, on the Net Size)	Constraints	Market 'Fit'/Supply Gap Filled	Deliverability	Grade
					• Includes areas of land at risk from surface water flooding.	office based development). The local demand is for industrial/warehouse properties of up to 5,000 sqm but regional/national requirements will likely be for larger properties of 10,000 sqm+.		
T3.13 (BIS015)	Haydon, Stoke Orchard Road	Bishops Cleeve (West)	4.64 (3.71)	16,000	• Lies In the zone of influence for Cotswold Commons and Beechwoods Special Area of Conservation (SAC) • Includes Grade 2 agricultural land • Includes areas of land at risk from surface water flooding.	The three sites are interlinked and can be reviewed together. Access to the strategic road network is more limited here and a development would primarily support the Bishops Cleeve. The Site links to Malvern View Business Park which accommodates a number of micro and small businesses mostly in general engineering and manufacturing facilities. GE Aerospace is also nearby, but that facility contains considerable internal expansion space (as is discussed in Section 7.0). The market here will thus likely support a smaller allocation to provide	Lightly constrained sites, outside of the Flood Risk areas there are no strong barriers to delivery, but the local market would only support the development of a portion of the available land, around 10 ha or less. There will also be pressure for housing here given adjoining uses.	C
T3.14 (BIS012)	Land off Stoke Road	Bishops Cleeve (West)	71.99 (64.79)	259,160	• Lies In the zone of influence for Cotswold Commons and Beechwoods Special Area of Conservation (SAC) • Site size reduced down from 75.00 ha to exclude land in Flood Zone 3			

Study Ref. (HELAA Ref.)	Site Name	Settlement	Size, ha (Estimated Net Size, ha*)	Employment Capacity, sqm (At 4,000 sqm/hectare, on the Net Size)	Constraints	Market 'Fit'/Supply Gap Filled	Deliverability	Grade
					• Land in the centre of the site is in Flood Zone 2 • Public Right of Way crosses the north of the site • Includes areas of land at risk from surface water flooding • Trees onsite • Housing adjacent • Pond onsite.	industrial/warehouse units of less than 1,000 sqm each.		
T3.15 (BIS017)	Land to the North of Stoke Road	Bishops Cleeve (West)	3.34 (2.74)	10,960	• Lies In the zone of influence for Cotswold Commons and Beechwoods Special Area of Conservation (SAC) • Includes Grade 2 agricultural land • Includes areas of land at risk from surface water flooding.			
T3.16 (GOT009)	Land West of Evesham Road	Bishops Cleeve (North)	25.10 (15.06)	60,240	• Lies In the zone of influence for Cotswold Commons and Beechwoods Special Area of Conservation (SAC)	The south of the site is subject to an undecided planning application for 100 homes (App. No. 24/00573/OUT), along with new landscaping and habitat (App. No. 24/00574/FUL).	Site is deliverable with constrained areas of land mostly in the south and good A-Road access. However, the main aspiration here appears to be for housing, and it would need to be confirmed if there is any real interest in	C

Study Ref. (HELAA Ref.)	Site Name	Settlement	Size, ha (Estimated Net Size, ha*)	Employment Capacity, sqm (At 4,000 sqm/hectare, on the Net Size)	Constraints	Market 'Fit'/Supply Gap Filled	Deliverability	Grade
					• Site size reduced down from 25.50 ha to exclude land in Flood Zone 3 • The south of the Site is in Flood Zone 2 associated with Dean Brook • Includes areas of land at risk from surface water flooding • Trees onsite	Site is well located on the A435 but is distant from Tewkesbury and Cheltenham and would mostly support the Bishops Cleve Market. Nearby is Malvern View Business Park which accommodates a number of micro and small businesses mostly in general engineering and manufacturing facilities. GE Aerospace is also nearby, but that facility contains considerable internal expansion space (as is discussed in Section 7.0). The market here will thus likely support a smaller allocation to provide industrial/warehouse units of less than 1,000 sqm each.	developing employment uses here.	
T3.17 (GOT018)	Land at the Old Farmers Arms, Evesham Road.	Bishops Cleeve (North)	2.99 (2.54)	10,160	• Lies In the zone of influence for Cotswold Commons and Beechwoods Special Area of	The bulk of the site, excluding the former public house now has consent for a 2-Form of Entry (2FE) Primary School with nursery (App. No. 23/00835/CM). It assumed to not be	-	-

Study Ref. (HELAA Ref.)	Site Name	Settlement	Size, ha (Estimated Net Size, ha*)	Employment Capacity, sqm (At 4,000 sqm/hectare, on the Net Size)	Constraints	Market 'Fit'/Supply Gap Filled	Deliverability	Grade
					Conservation (SAC) • Site size reduced down from 2.50 ha to exclude land in Flood Zone 3 • Land in the south is in Flood Zone 2 • Incorporates a former public house and paddock • Trees onsite • Includes areas of land at risk from surface water flooding	available for employment development.		
T3.18 (BIS016A)	Land to the North of Bishops Cleeve	Bishops Cleeve (North)	40.34 (24.20)	96,800	• Lies In the zone of influence for Cotswold Commons and Beechwoods Special Area of Conservation (SAC) • Parts of the site are in Flood Zone 2 • Woodmancote Conservation Area 550m to the east • Public Right of Way crosses the site • The site is identified as a gap of local importance (Land between	Site is well located on the A435 but is distant from Tewkesbury and Cheltenham and would mostly support the Bishops Cleve Market. Nearby is Malvern View Business Park which accommodates a number of micro and small businesses mostly in general engineering and manufacturing facilities. GE Aerospace is also nearby, but that facility contains considerable internal expansion space (as is discussed in Section	Site is deliverable with constrained areas of land mostly in the south and good A-Road access. However, the site is adjacent to a residential area which has seen considerable recent development, so there will likely be a strong aspiration for housing. And development here would also need to take into account the primary school proposal on the frontage (Land at the Old Farmers Arms).	C

Study Ref. (HELAA Ref.)	Site Name	Settlement	Size, ha (Estimated Net Size, ha*)	Employment Capacity, sqm (At 4,000 sqm/hectare, on the Net Size)	Constraints	Market 'Fit'/Supply Gap Filled	Deliverability	Grade
					Bishops Cleeve and Gotherington) under Policy LAN3 of the Tewkesbury Local Plan. • Includes areas of land at risk from surface water flooding. • Trees onsite • Housing adjacent	7.0). The market here will thus likely support a smaller allocation to provide industrial/warehouse units of less than 1,000 sqm each.		
T3.19 (TWY023)	Brockeridge Business Park, Brockeridge Road	Twyning	11.14 (8.36)	33,440	• Includes Grade 2 Agricultural Land • Brokeridge Common lies 465 metres NW • Scheduled Ancient Monument Towbury Hill Camp is 950 metres SW from site • Listed Buildings within 500 metres • Includes areas of land at risk from surface water flooding. • Pond on site • Trees onsite.	Site has is in a very strong location at the A38/50 Junction, close to the M5. It would likely best serve local scale logistics operations which need direct Motorway access. This is evidenced by the planning application for the site, An Outline application for the extension of Brockeridge Business Park to provide for up to 33,329 sqm of B8 employment use classes which was refused in 2025 (App. No. 21/01498/OUT). However, it has been approved at Appeal in June 2026 (Appeal Ref: 6003077) and it is	Motorway accessible site, adjacent to an existing Business Park and under the control of a developer, with an active development proposal. The larger logistics scheme here has now been approved and is likely to progress. This should be recognised in the SLP. 4 ha of expansion land is already allocated in the existing Tewkesbury Local Plan at Brockeridge Business Park and this was considered previously in Section 7.0.	A

Study Ref. (HELAA Ref.)	Site Name	Settlement	Size, ha (Estimated Net Size, ha*)	Employment Capacity, sqm (At 4,000 sqm/hectare, on the Net Size)	Constraints	Market 'Fit'/Supply Gap Filled	Deliverability	Grade
						assumed it will now be progressed. However, the site is also distant from the main settlements of the SLP Area so would serve a wider regional economy.		
T3.20 (TWY024)	Twittocks Farm	Twyning	11.82 (8.87)	35,480	• Oil pipeline buffer runs across western edge of site • Brokeridge Common lies 245 metres north • Scheduled Ancient Monument Towbury Hill Camp is 275 metres SW from site • Listed Buildings within 500 metres • Public Right of Way crosses the site • Pond onsite • Trees onsite • Farm onsite • Housing adjacent • Includes areas of land at risk from surface water flooding.	Site has is in a very strong location at the A38/50 Junction, close to the M5. It would likely best serve local scale logistics operations which need direct Motorway access. However, it is also distant from the main settlements of the SLP Area so would serve a wider regional economy.	Site has some constraints but is otherwise a flat site in a key strategic road location. Delivery for relevant uses would likely be achievable assuming all constraints can be addressed.	B
T3.21 (TED003)	Teddington Hands Roundabout	Teddington	7.89 (5.92)	23,680	• Wormington to Tirley gas pipeline crosses NW of site	It is assumed the proposal would be for the redevelopment of the	Site has constraints which will need to be reviewed further to ensure the site is deliverable.	B

Study Ref. (HELAA Ref.)	Site Name	Settlement	Size, ha (Estimated Net Size, ha*)	Employment Capacity, sqm (At 4,000 sqm/hectare, on the Net Size)	Constraints	Market 'Fit'/Supply Gap Filled	Deliverability	Grade
					• Listed Buildings within 500 metres • Developed site, in use as a Truck stop, lorry park, haulage yard and associated offices and vehicle depots and transport café. A retail food store exists on site as well as a Petrol Filling Station • Trees onsite • Includes areas of land at risk from surface water flooding • Possible site contamination from current uses.	majority of the existing roadside services uses. Site is in a very strong location on the A46 and is accessible to the existing Employment Areas of Tewkesbury which include a Cluster of Advanced Manufacturing uses, some in Defence Industries. The site could build on this cluster, especially given the limited development opportunities within Tewkesbury itself. The location could also support logistics uses although site size would limit development to local scale units of sub-5,000 sqm which are in demand in the Tewkesbury area.	It will also need to be confirmed that proposals are for new E(g)/B-Class development as opposed to confirming/expanding existing roadside service operations in the SLP. If the proposal is to confirm existing operations, then this site does not represent new employment development land. If the site is proposed to redevelopment, and if it can be shown that constraints can be addressed then this would represent a good growth opportunity for Tewkesbury. In particular, this site might represent a short term development opportunity given that delivery at the Tewkesbury Garden Community site is unlikely till later in the SLP period.	
T3.22 (TOD003)	Evesham Road and Stow Road	Toddington	3.81 (3.24)	13,215 (reflecting planning consent)	• Within a special Landscape Area • Includes areas of land at risk from surface water flooding	The site now has hybrid planning consent for: • Full consent for the erection of an industrial building providing 8,625 sqm for Use Class B2, E(g)(iii) and Ancillary Office Space	Active expansion site for a local business, this should be recognised in the SLP.	B

Study Ref. (HELAA Ref.)	Site Name	Settlement	Size, ha (Estimated Net Size, ha*)	Employment Capacity, sqm (At 4,000 sqm/hectare, on the Net Size)	Constraints	Market 'Fit'/Supply Gap Filled	Deliverability	Grade
						• Outline consent for phase 2 comprising the construction of an industrial building of 4,590 sqm for Use Class B2, E(g)(iii) and Ancillary Office Space (App. No. 22/00968/FUL). Thus is now an active employment development site. The proposed space will allow the expansion of Bushell and Meadows which manufactures precision engineering products for the medical markets.		
T3.23 (WIN006)	Land between Greet Road and Gretton Road, opposite Winchcombe School	Winchcombe	12.13 (9.10)	36,400	• Within a special Landscape Area • Listed Buildings within 500 metres • Public Right of Way crosses the site • Trees onsite • Includes areas of land at risk from surface water flooding • Housing adjacent	Compared to other options, this site does not link well to the strategic road network and would primarily serve the Wincombe area. In this regard some 9-13 ha of land would likely oversupply the town. Existing local industrial estates are focused on retail trade uses, mostly proving small workshops of sub-500 sqm each. There is no strong market	Large site with modest constraints. The full site allocation would oversupply the local area for E(g)/B-Class uses, a smaller allocation would support rural growth. However, the site is in a mostly residential area, which has seen recent housing development, so there will likely be pressure for residential uses here.	C

Study Ref. (HELAA Ref.)	Site Name	Settlement	Size, ha (Estimated Net Size, ha*)	Employment Capacity, sqm (At 4,000 sqm/hectare, on the Net Size)	Constraints	Market 'Fit'/Supply Gap Filled	Deliverability	Grade
						evidence of need for a large additional employment site here, although a smaller allocation could support rural growth.		
T3.24 (TEWK013)	Land at Odessa Farm	Tewkesbury	24.95 (14.96)	59,840	• Site size reduced down from 26.70 ha to exclude land in Flood Zone 3 • Land in the South east is in Flood Zone 2 • Oil pipeline buffer runs N - S through the west of the site. • Wormington - Tirley and Wormington to Treaddow gas pipelines cross through site • Lies In the zone of influence for Cotswold Commons and Beechwoods Special Area of Conservation (SAC) • Scheduled Ancient Monument - Margarets Camp, Moated Site and Associated	Site has good access off the A38, at an existing roundabout, and is one of only three options for Tewkesbury town. Compared to other alternative however it is distant from the existing Employment Areas and on the edge of a mostly residential area. Its good road access would suit logistics and other industrial/warehouse operations that want a main road location.	Site is Gloucestershire County Council owned so the public sector would be in a strong position to procure development partners and drive forward development. However, the site appears constrained, and more research would be needed to confirm the realistic developable area. In market terms the site might better suit housing.	C

Study Ref. (HELAA Ref.)	Site Name	Settlement	Size, ha (Estimated Net Size, ha*)	Employment Capacity, sqm (At 4,000 sqm/hectare, on the Net Size)	Constraints	Market 'Fit'/Supply Gap Filled	Deliverability	Grade
					Structures lies 290 metres to the north • North East part of site lies within Tewkesbury Conservation Area • Listed Buildings within 500 metres • Buildings on site • Housing adjacent • Trees onsite • Infrastructure for Severn Trent Water on the site • Includes areas of land at risk from surface water flooding			
T3.25 (BADG027)	Land South of Badgeworth Lane	Badgeworth	6.58 (4.94)	19,760	• Listed Buildings within 500 metres • Norman's Brook runs to the south • Trees onsite	Overall, this rural site is distant from existing employment clusters while Shurdington, although located on the A46, does not have an existing E(g)/B-Class Employment Area. Stakeholders have not highlighted a need for additional employment land and premises in this location.	There are no particular barriers to delivery here although as in the north there will likely be pressure for housing in this mostly residential area.	D
T3.26 (SHUR030)	Land North of Badgeworth Lane	Shurdington	4.14 (3.11)	12,440	• Listed Buildings within 500 metres • In the Green Belt • Housing adjacent	This site is subject to an undecided Outline planning application for up to 90 dwelling (App.	There are no particular barriers to delivery here although the current aspiration is for housing.	D

Study Ref. (HELAA Ref.)	Site Name	Settlement	Size, ha (Estimated Net Size, ha*)	Employment Capacity, sqm (At 4,000 sqm/hectare, on the Net Size)	Constraints	Market 'Fit'/Supply Gap Filled	Deliverability	Grade
					• Includes areas of land at risk from surface water flooding	No. 25/00712/OUT). So there is a clear aspiration for housing here. Overall, this rural site is distant from existing employment clusters while Shurdington, although located on the A46, does not have an existing E(g)/B-Class Employment Area. Stakeholders have not highlighted a need for additional employment land and premises in this location.		
T3.27 (TWIG018)	Tewkesbury Road	Twigworth	4.56 (3.95)	15,800	• Site size reduced down from 56.5 ha to exclude land in Flood Zone 3 • Oil pipeline runs through site • Includes some Grade 2 agricultural land • Trees onsite (includes TPOs) • Lies In the zone of influence for Cotswold Commons and Beechwoods Special Area of Conservation (SAC)	Rural site but well located off the A38. It sits adjacent to Twigworth Court Business Park and represents a logical extension to that business park. Twigworth Court is a small but well occupied scheme with occupiers focused on health and Creative Industries. The site could build on this cluster likely with the provision of smaller and grow-on workshops and offices of sub-1,000 sqm each, reflecting local demand.	Site has a range of constraints and evidence would need to be provided that these can be overcome. Subject to this, this flat, accessible site would be deliverable, building on the existing local cluster.	B

Study Ref. (HELAA Ref.)	Site Name	Settlement	Size, ha (Estimated Net Size, ha*)	Employment Capacity, sqm (At 4,000 sqm/hectare, on the Net Size)	Constraints	Market 'Fit'/Supply Gap Filled	Deliverability	Grade
					• Listed Buildings within 500 metres • Public Right of Way crosses the site • Centre of site is in Flood Zone 2 • Includes areas of land at risk from surface water flooding			
T3.28 (HIG010A/ B/ C/D)	Plots of land at Highnam (Land north and south of Newent Road (B4215))	Highnam	63.17 (37.90)	151,600	• Overhead electricity cable passes through the site • Includes an active Golf Course • Includes Grade 1 agricultural land • Trees onsite, large woodland - Corseleas Brake – to the west. Highnam Woods to the NW • Listed Buildings within 500 metres • Public Right of Way crosses the site • Includes areas of land at risk from surface water flooding	Land includes the existing Highnam Business Centre. The business centre is a good quality rural scheme, including a wide range of businesses with a focus on Professional and Business Services. Land to the east has Outline consent for a housing and employment scheme which proposes of 1.48 ha (net), to be delivered for 24 units of 73-141 sqm with a total size of 4,084 sqm (GIA) (App. No. 21/01392/OUT). A Reserved Matters Application for the commercial element is awaiting a decision (App. No. 26/00417/APP, see Section 7.0). This	The consented expansion site is progressing under the control of the Business Park owners. Rodway Hill Golf Course appears to be an active leisure facility; it is not clear what scope exists for its redevelopment. Land north of the B4215 is partly now consented for housing and will likely see pressure for further housing in the future. This area is also Grade 1 agricultural land.	C

Study Ref. (HELAA Ref.)	Site Name	Settlement	Size, ha (Estimated Net Size, ha*)	Employment Capacity, sqm (At 4,000 sqm/hectare, on the Net Size)	Constraints	Market 'Fit'/Supply Gap Filled	Deliverability	Grade
						consent should be shown in the SLP. Beyond this the Plots are in a rural area, albeit relatively close to the A40. Evidence is that the existing Business Park, and expansion land, is meeting most local needs. There is not an urgent requirement for an additional large employment allocation here.		
T3.29 (MIN011)	Hectors Farm remaining parcel	Minsterworth	3.06 (2.60)	10,400	• Listed Buildings within 500 metres • Present access via narrow rural road – Hygrove Lane, but more direct access to A48 may be possible • New build housing on frontage (Wildflower Orch) • Farm access runs through the site • Caravan Park adjacent • Includes areas of land at risk from surface water flooding	Rural site but with reasonable access onto A48, close to A40. There is a small cluster of rural businesses nearby including haulage firms and agricultural businesses and this site could build on that, but otherwise the location is distant from employment clusters and would be a low priority for developers.	Site could support rural growth assuming acceptable access can be agreed, but the area has also seen recently completed housing developments and has a large caravan park adjacent. There would thus likely be strong pressure for residential uses here.	C

Study Ref. (HELAA Ref.)	Site Name	Settlement	Size, ha (Estimated Net Size, ha*)	Employment Capacity, sqm (At 4,000 sqm/hectare, on the Net Size)	Constraints	Market 'Fit'/Supply Gap Filled	Deliverability	Grade
T3.30 (FOD001)	Land south of the A40, west of Highnam Roundabout 1	Highnam	98.87 (59.32)	237,280	• Listed Buildings within 500 metres • Public Rights of Way cross the site • Two large farms in the south of the site, other farms/houses adjacent • Multiple ownerships • Includes Grade 1-2 agricultural land • Includes areas of land at risk from surface water flooding	This large site would likely be developed for a mix of uses and so the wider mix would have to be collectively assed and approved. The site has good access to the A40 and A48 but located to the west of Gloucester it is distant from existing employment clusters such as Gloucestershire Airport and Gloucester Business Park, as well as the Gloucester/Cheltenham settlement areas. It would thus be a lower priority for businesses in the key sectors The strategic road position and large area of land could suit a large logistics scheme, reflecting ongoing strong B8 demand. However, again sites closer to the M5 would be preferred. The site also has rail frontage which might allow the delivery of a multi-modal B8 scheme, but this would require further assessment and engagement with	As mentioned, delivery would likely be for a mixed use scheme with housing cross funding employment and other elements including the large investment in internal infrastructure required. Such a scheme would be complex but if developers and funding was secured there are no strong barriers to delivery.	C

Study Ref. (HELAA Ref.)	Site Name	Settlement	Size, ha (Estimated Net Size, ha*)	Employment Capacity, sqm (At 4,000 sqm/hectare, on the Net Size)	Constraints	Market 'Fit'/Supply Gap Filled	Deliverability	Grade
						specialist operators to confirm. If a large housing scheme was brought forward here this would generate demand for smaller units, particularly sub-5,000 sqm industrial/warehouse units, but that would be dependent on the scale of the residential development progressed.		
T3.31 (HIG009)	Land south of the A40, west of Highnam Roundabout (Highnam with Haw, Bridge Ward)	Highnam	68.88 (41.33)	165,320	• Woodland in area - Highnam Woods lie on northern boundary of the site. Corseleas Break and Pipers Grove lie within site boundary • Listed Buildings within 500 metres • Public Rights of Way cross the site • Two large farms in the south of the site, other farms/houses adjacent • Long Brook passes through the site, adjoining land is in Flood Zones 2/3	This large site would likely be developed for a mix of uses and so the wider mix would have to be collectively assed and approved. The site has good access to the A40 and A48 but located to the west of Gloucester it is distant from existing employment clusters such as Gloucestershire Airport and Gloucester Business Park, as well as the Gloucester/Cheltenham settlement areas. It would thus be a lower priority for businesses in the key sectors The strategic road position and large area of land	As mentioned, delivery would likely be for a mixed use scheme with housing cross funding employment and other elements including the large investment in internal infrastructure required. Such a scheme would be complex but if developers and funding was secured there are no strong barriers to delivery.	C

Study Ref. (HELAA Ref.)	Site Name	Settlement	Size, ha (Estimated Net Size, ha*)	Employment Capacity, sqm (At 4,000 sqm/hectare, on the Net Size)	Constraints	Market 'Fit'/Supply Gap Filled	Deliverability	Grade
					• Includes Grade 1-2 agricultural land • Includes areas of land at risk from surface water flooding	could suit a large logistics scheme, reflecting ongoing strong B8 demand. However, again sites closer to the M5 would be preferred. The site also has rail frontage which might allow the delivery of a multi-modal B8 scheme, but this would require further assessment and engagement with specialist operators to confirm. If a large housing scheme was brought forward here this would generate demand for smaller units, particularly sub-5,000 sqm industrial/warehouse units, but that would be dependent on the scale of the residential development progressed.		
T3.32 (SHUR020A)	Land at Brizen Farm	Shurdington, Cheltenham (South)	28.84 (17.30)	69,200	• In Green Belt • Trees onsite (includes TPOs) • In the zone of influence for Cotswold Commons and Beechwoods	Land is well located on the A46, running south from Cheltenham to the A417 and M5. This could make it a desirable plot for logistics companies and others who want a large site on a main road corridor. However, its	If allocated, and removed from Green Belt, the site has only modest constraints. It is owned by a construction company – Newbridge Construction – who would be able to drive forward development. However, the site is adjacent to housing	C

Study Ref. (HELAA Ref.)	Site Name	Settlement	Size, ha (Estimated Net Size, ha*)	Employment Capacity, sqm (At 4,000 sqm/hectare, on the Net Size)	Constraints	Market 'Fit'/Supply Gap Filled	Deliverability	Grade
					Special Area of Conservation (SAC) • Listed Buildings within 500 metres • Public Right of Way crosses the site • Housing adjacent • Includes areas of land at risk from surface water flooding	links to the M5 are less direct than other options and it is located in a mostly residential area distant from existing employment areas and key facilities such as GCHQ. It would likely be a lower priority for commercial developers.	including a new build Redrow scheme and there would likely be strong pressure for additional housing development here. In this regard it is noted that the site was subject to a refused application for housing in 2013 (App. No. 13/00415/OUT).	
T3.33 (DOW010)	Land North of Ashville Business Park	Staverton	13.61 (10.21)	34,902 (Based on current Outline App.)	• In Green Belt • Trees onsite • Public Right of Way crosses the site • Sports club on site	Site links to the Airport employment cluster to the south along the B4063 Cheltenham Road East. Bamfurlong Industrial Park, Ashville Business Park and particularly Meteor Business Park, are key local centres for Advanced Manufacturing with specialisms in Aerospace and Defence, including companies such as Actemium ICS, Safran and Ontic Engineering & Manufacturing. More generally the Airport area is identified by stakeholders as a key focus for inward investment and market	The land is subject to an undecided Hybrid Planning Application for: • Full planning application for the erection of a warehouse of 9,290 sqm • Outline planning application for the expansion of an existing business park, including the erection of up to 22,900 sqm of B2/B8 and 2,712 sqm of light industrial use with ancillary Class E uses. The relocation of the existing day centre and sports and social club (App. No. 25/00169/OUT). A second Outline Application proposes another 19,658 sqm of E(g)/B-Class	A

Study Ref. (HELAA Ref.)	Site Name	Settlement	Size, ha (Estimated Net Size, ha*)	Employment Capacity, sqm (At 4,000 sqm/hectare, on the Net Size)	Constraints	Market 'Fit'/Supply Gap Filled	Deliverability	Grade
						interest, particularly for industrial and warehouse units of up to 5,000 sqm, building on the existing local cluster. Ashville Business Park has seen recent growth on land to the east. Expansion to the north is away from the B4063 Cheltenham Road East road frontage, and thus less prominent than some other options but still represents logical growth of the established cluster.	employment floorspace in the north (App. No. 26/00064/OUT). The initial warehouse is identified as being required to meet the growth requirements of existing local Aerospace employer Safran. Other premises will provide for the expansion of Ashville Business Park and accommodate the growth plans of other local firms such as Hameln Pharma and Spectrum Medical. The application has been submitted by developer Ashville Group, who also own the southern portion of the site. Thus with developer partners in place, and at least one occupier secured, delivery is likely.	

Source: Various, 2026

*The Net site size uses an 'efficiency ratio' of:

- Small Sites (<2ha): 85-90 percent efficiency
- Medium Sites (2-10ha): 75 – 85 percent efficiency
- Large Sites (10ha +): 60-75 percent efficiency.

This deducts land for:

- Strategic Green Infrastructure
- Sustainable Drainage Systems

- Transport Infrastructure – Major spine roads and dedicated corridors (not on-site parking and manoeuvring areas). It assumes a smaller site will use existing infrastructure surrounding, i.e. existing roads in an industrial estate, while a larger site will require more internal infrastructure, hence have a lower efficiency ratio
- Topographical constraints.

8.5 The 40 relevant Call for Sites submissions would provide some 92.38 ha of land in Cheltenham and 590.52 ha in Tewkesbury (using net estimates). This excludes two sites which are already included in the Employment Sites Assessments covered previously, and one site now consented for education uses. Within that Sites graded A-B can be said to represent realistic options for employment land supply, measured against market and deliverability criteria:

- A Grade Sites – Represent the best options to meet strategic needs although this does not preclude them being able to provide space for local business growth. **211.28 ha** (net) in nine sites falls into this category, providing sufficient land to meet identified needs overall, albeit with a likely focus on industrial and warehouse uses. These sites have capacity to provide 839,182 sqm of floorspace. This potential supply is focused in two locations, around Gloucestershire Airport and at Junction 10, M5. All A Graded land falls into Tewkesbury but is highly accessible to both Cheltenham and Gloucester. Options are:
  - 40.85 ha (net) in four sites, located north and west of Gloucestershire Airport. Accessible to both Gloucester and Cheltenham and building on a strong established cluster of Advanced Manufacturing businesses with a focus on Aerospace and Defence. Full development of land in the north may have some impacts on Airport operations, however
  - 106.93 ha (net) in three of the larger sites around Junction 10, M5. Smaller sites here are generally graded B. While there is no existing business cluster here, these sites have the best links to the M5 of any options put forward (with further junction upgrades underway) as well as direct A-road links into Cheltenham. A development here would suit industrial and particularly logistics uses which need direct M5 access.
  - T3.4 (STA020): Hayden Lane, Cheltenham (55.09 ha net) would represent a logical further extension to the A7: West Cheltenham JCS site which is progressing for Digital and Technologies office and R&D uses. However, as West Cheltenham will take some years to develop out, this site may not be needed in the SLP period
  - T3.19 (TWY023): Brockeridge Business Park, Brockeridge Road, Twyning (8.36 ha net) now has a consent for warehouse uses on a prominent site close to the M50/A38 Junction. This site will serve a wider strategic market

however and has only modest links to the main settlements of the SLP Area.

- Grade B Sites – Are the strongest sites for meeting local OAN. Eight sites totalling **56.74 ha** (net) falling into this category and are generally smaller sites, 3-7 ha in size. These have capacity to provide 227,215 sqm of floorspace. These include options again at Gloucestershire Airport, albeit sites with slightly weaker access to the key industrial cluster here. Also some of the smaller and more constrained options at Junction 10, M5 and at Junction 1, M50. They also include options to allow local scale growth around Tewkesbury town, most particularly T3.1 (OXE003): Tewkesbury Garden Town (Garden Community) Strategic Allocation. The wider Garden Community scheme is being progressed under Homes England leadership although there are large site constraints which need to be addressed. Some 20 ha of employment land is likely to be delivered in the SLP period, potentially meeting a mix of local and strategic needs, partially dependant on whether a new M5 Junction can be provided in the area.

8.6 Ultimately, **268.02 ha (1.066 million sqm)** of supply is potentially available in the Call for Sites options graded A or B, sufficient to meet projected OAN. However, this supply will need to be further reviewed against other planning criteria, particularly as a number of options would require Green Belt release to realise.

Summary

8.7 BE Group has reviewed 40 Call for Sites submissions where B-Class employment uses are proposed, either individually or as one of several possible uses. These have been appraised and graded A-E, as defined in Table 35 above.

8.8 Table 37 summarises the sites by each of the above grades. A and B graded sites offer the best potential to meet strategic and local needs.

8.9 Of a potential (net) supply of 682.90 ha, 268.02 ha (1.066 million sqm) of supply is available in the Call for Sites options graded A or B, sufficient to meet projected OAN. However, this supply will need to be further reviewed against other planning criteria,

particularly as a number of options would require Green Belt release to realise.

Table 37 – Site Submissions Appraisal by Category

Category	Number of Sites	Land Supply, ha*	Floorspace Capacity, Sqm	Comments
A Key Strategic Development Options	9	211.28	839,182	Includes Sites at Gloucestershire Airport: • T3.2/T3.3 (CHU015/ CHU035): Parton Farm/ Evergreen Nurseries, Parton Road (Function as a single site) • T3.5 (CHU039): Land at Gloucestershire Airport • T3.33 (DOW010): Land North of Ashville Business Park And around J10, M5: • T3.7/ T3.8 (ELM011/ ELM003): Land NW of Junction 10 of M5 at Hardwicke/ Stanboro Nurseries (Function as a single site) • T3.12 (BOD013D): Land around Boddington (Site D)
B Key Local Development Options	8	56.74	227,215	Smaller and sometimes more constrained options at Gloucestershire Airport; at J10, M5; at J1, M5; around Tewkesbury town plus one further option at Twigworth.
C Potential Local Supply (subject to Other Issues)	16	361.04	1,445,320	Other, secondary local options which could be reviewed further if required.
D Limited suitability for B-Class Uses	4	53.84	215,360	Based on market fit/deliverability, sites are poorly suited for employment development. This does not preclude the possibility that they are suited for other uses.
E Unlikely to be deliverable development site	-	-	-	-
Sites already reviewed as Existing Employment Land Supply/Consented for Other Uses	3	-	-	-
TOTAL	**40**	**682.9**	**2,727,077**	

Source: BE Group, 2026 *Measured on a net basis.

9.0 CONCLUSIONS, RECOMMENDATIONS AND SPATIAL STRATEGY

Introduction

9.1 This study has included a wide-ranging look at the factors affecting the SLP Area's local economy, with reference to those that are likely to affect the supply of land and property within the sub-region. This section draws together the main issues that will need to be addressed and identifies suitable locations for strategic and locational E(g)/B-Class development, considering

- The Qualitative Employment Land Need to be Met
- Key Sectors in the SLP Area
- The Demand for, and Locational Requirements of, Different Use Classes and Key Sectors
- The Existing Employment Areas of the SLP Area, and the Gaps in that Supply
- The Existing Stock of Employment Land and How that Meets Needs
- Future Employment Sites which could Address Supply Gaps.

9.2 The study has been undertaken in line with both the National Planning Policy Framework (2024) and relevant Planning Practice Guidance.

Overall Quantitative Needs

9.3 The Gloucestershire Housing and Economic Needs Assessment (HENA) (2026) identifies an OAN for the SLP Area, over 2024-2046 of:

- Industrial – 673,900 sqm or 168.5 ha, equating to 30,600 sqm/year or 7.7 ha/year, with the allocation into each authority determined through joint planning.
- Offices – Between 109,600 and 206,200 sqm, or 28.9 and 41.2 ha, equating to 4,982-9,372 sqm or 1.31-1.87 ha/year, with any allocation into individual authorities to be determined through joint strategic planning processes.

9.4 This is adjusted to the 20 year period 2026-2046:

- Industrial – **612,636 sqm or 153.18 ha (gross)** in the SLP Area, equivalent to around **30,600 sqm or 7.7 ha/year**, with the allocation into each authority

determined through joint planning. Development should focus on the M5 corridor, with a particular need for strategic industrial land

- Offices – Between **99,636 sqm and 187,455 sqm, or 22.27 and 37.45 ha** in the SLP Area, **equating to 4,982-9,372 sqm or 1.31-1.87 ha/year**, with any allocation into individual authorities to be determined through joint strategic planning processes.

Sectoral Growth

Strengths in Overall Sectors

9.5 Manufacturing remains a key part of the SLP economy, employing 18,700 people in 655 firms. Manufacturing employment is focused in Tewkesbury with 10,850 recorded jobs, 58.0 percent of the SLP total, in 290 firms, with concentrations along the M5 Corridor. Gloucester had 4,170 manufacturing jobs (22.3 percent of the total) and Cheltenham 3,680 (19.7 percent). Of the three authorities, only Tewkesbury saw significant growth in manufacturing employment over 2015-2024, a gain of 1,665 jobs, while Cheltenham and Gloucester recorded losses of -290 and -170 respectively, over the same period.

9.6 In terms of manufacturing sub-sectors, Tewkesbury has a strength in aerospace manufacturing (3,500 jobs in 2024), hosting several large aerospace companies as well as the Gloucestershire Airport. Machinery and equipment, metal products and electronics are also local manufacturing strengths in Tewkesbury. Gloucester and Cheltenham have strengths in manufacturing of machinery and equipment and metal products, although Gloucester also has a large number of food production jobs (600).

9.7 Transport and storage employed 4,420, across the SLP Area, in 2024 in 435 firms. Almost half of that employment (2,150) is in Tewkesbury. Another 1,850 (41.9 percent) were employed in this sector in Gloucester while transport and storage has a limited role in Cheltenham, with only 329 (7.2 percent) employed. This will reflect the fact that Gloucester and Tewkesbury have more direct links to the M5 and major A-Roads such as the A38.

9.8 The sector lost jobs across the SLP Area but gained 75 businesses over the decade.

One explanation for this is the increasing automation of logistics operations which reduces the numbers employed in a modern warehouse, a trend likely to continue in the future. However, automated facilities still require accommodation so premises demand will remain.

9.9 The Wholesale sector employed 8,750 in 2024, spread between Cheltenham (2,500 or 28.6 percent), Gloucester (3,250 or 37.1 percent) and Tewkesbury (3,000 or 34.3 percent). All three authorities recorded employment losses of -250 jobs each, in wholesale.

9.10 Despite some modest, recorded jobs losses, most notably in Cheltenham, Construction is a key sector across the SLP Area, employing 8,450 in 1,985 businesses. Employment is relatively evenly spread between the three local authority areas, which have around a third of local employment each. Across the three authorities the sector gained 510 companies over 2015-2025, although employment numbers fluctuated more, with only Gloucester seeing growth. This remains a strong sector across the SLP Area, however.

9.11 The office economy of the SLP Area is extensive, employing 50,682 and accounting for nearly half of all businesses (5,235). It is largest in Cheltenham, with 22,782 employed in 2,435 companies, or around 45 percent of both totals although has a strong role in Gloucester and Tewkesbury as well.

9.12 Within the wider office economy, Professional, Scientific and Technical is the largest sector by job numbers employing 15,875 in the SLP Area in 2024. It is strongest in Cheltenham and has a more modest role in Gloucester. Administrative and Support Services by comparison is more evenly concentrated in Cheltenham and Gloucester.

9.13 Unsurprisingly Information and Communication is focused in Cheltenham with 5,350 jobs or half the total for the SLP Area, in 480 businesses. By far the strongest growth was also in Cheltenham where 2,375 jobs were added, compared to 755-850 elsewhere. Finance and Insurance employed 2,000-2,500 in each authority, but is generally a sector in decline, by numbers of jobs, if not always by business numbers. In part this will reflect the closure of local retail banks as more financial services move

online, a national trend likely to continue. Conversely, increasing online trading will boost ICT activities.

9.14 A review of national, sub-regional and local policy documents, and socio-economic, data identified nine key sectors for the SLP Area:

- Advanced Manufacturing
- Clean Energy
- Creative Industries
- Defence
- Digital and Technologies
- Financial Services
- Life Sciences
- Professional and Business Services
- Agri-Tech.

9.15 These are the eight sectors (the IS-8), of the UK Government's new Modern Industrial Strategy (2025), plus Agri-Tech to reflect the importance of agricultural industries in Gloucestershire. 62,810 jobs in 6,104 businesses were recorded in these sectors, as of 2024/2025. Table 38 sets out current strength, and recent growth patterns of these sectors.

9.16 Overall, although there is some representation for all of the nine sectors in the SLP Area, the sub-region has clear strengths in Advanced Manufacturing (overlapping with Defence and including an aerospace cluster), Digital and Technologies (again overlapping with Defence and also forming the majority of 'Creative Industries' in the SLP Area) and Professional and Business Services. The latter two have a focus in Cheltenham while Advanced Manufacturing is focused in Tewkesbury. The recent growth picture in all three Key Sectors is mixed. However, it is still **recommended that future allocations of employment land, and development policy, seek to build upon and expand these established local clusters, as well as encouraging growth in manufacturing, logistics and office based industries more generally (Recommendation One).**

Table 38 – Key Sectors in the SLP Area

Key Sector	Current Strength	Recent Change, 2015-2024/25	Key Sub Sectors
Advanced Manufacturing	Employed 10,045 people in 125 businesses in 2024/2025. Has a clear focus in Tewkesbury with 6,840 employed in 65 firms.	Tewkesbury and particularly Gloucester saw some reductions in business numbers while Cheltenham saw some jobs losses. However, Tewkesbury gained 855 jobs. Thus the growth picture is mixed overall, but with some gains in Tewkesbury.	The three authorities have strengths in the manufacture of computer/electrical products and other machinery. 4,125 were employed in aircraft production, in ten businesses, most (3,500) in Tewkesbury.
Clean Energy	Not possible to clarify as sector falls into a diverse range of other industries.		
Creative Industries	Employed 11,265 in 1,330 businesses in 2024/2025. It is a strength of Cheltenham with 5,875 employed in 690 companies here.	All three authorities saw a significant increase in jobs over 2015-2024, nearly doubling employment numbers in the case of Gloucester and Tewkesbury. Overall, the SLP Area gained 5,180 jobs to 2024, an 85.1 percent increase. Only Tewkesbury saw growth in business numbers though, suggesting that most increases were in employment in existing firms.	Computer programming accounted for two thirds of creative industries jobs in 2024, 7,625. Around half of those jobs, 3,750, were in Cheltenham.
Defence	Cyber security falls outside of the national definition of defence, so no specific defence businesses were identified and only 450 jobs, all in Gloucester and Tewkesbury.	300 extra jobs are recorded in Gloucester since 2015.	Local defence activities will fall within Advanced Manufacturing or Digital and Technologies.
Digital and Technologies	A large sector for the SLP Area, employing 14,340 in 1,430 businesses. Cheltenham has the largest share of this, 6,285 jobs in 635 firms.	The sector saw good employment growth over 2015-2024, an increase of a third or 3,600 more jobs. However, the number of businesses reduced by 275, with decreases in all three local authority areas. The recorded reduction was only -16.1 percent however but does suggest that most increases were in employment in existing firms along with a lack of business start-up/new business inward investment.	Computer programming, consultancy and related activities' is the dominant sub-sector (with some overlap with creative industries), employing 7,625 in 785 businesses across the SLP Area
Financial Services	6,845 were employed in this sector in 2024, in 335 businesses. That stock is spread through the SLP Area, with Gloucester and Tewkesbury having the largest employment numbers but Cheltenham the largest numbers of businesses.	The sector lost 1,170 jobs to 2024, with two thirds of that loss recorded in Gloucester. Some modest growth in business numbers was recorded, a net uplift of 20 firms focused in Tewkesbury and Gloucester.	Employment strengths are focused in auxiliary financial activities, along with basic financial services in Gloucester.

Key Sector	Current Strength	Recent Change, 2015-2024/25	Key Sub Sectors
Life Sciences	Life Sciences has a limited role in the economy of the SLP Area with 20 businesses, employing 570.	The sector saw very modest growth in business numbers but overall reductions in employment over 2015-2024/2025.	Local employment is in the production of pharmaceuticals, medical and dental products.
Professional and Business Services	The largest of the Key Sectors, employing 19,240 in 2,864 businesses. It is concentrated in Cheltenham with 8,270 employed in 1,380 businesses.	Cheltenham has lost 1,385 jobs (-14.3 percent) and 70 businesses since 2015. Gloucester and Tewkesbury also saw a reduction in businesses but gained jobs.	Local employment is generally in traditional service sectors such as head office activities, architecture and engineering, plus employment services in Gloucester and Cheltenham.
Agri-Tech	The national definition of Agri-Tech excludes a lot of secondary and service functions, concentrating on the direct production of farm equipment which has a limited role in the SLP Area, with 55 jobs and no businesses recorded.	Very modest jobs growth recorded, mostly in Tewkesbury.	-

Source: Various, 2026

Market Demand and Property Requirements

Office Market

9.17 As of April 2026 SLP Area is 97.2 percent occupied by premises numbers and 95.2 percent occupied by floorspace. This suggests some constraints in supply by premises numbers, especially in Cheltenham where premises is 97.2 percent occupied, less so by floorspace.

9.18 Based on past transactions and stakeholder comments, local demand is for suites of less than 500 sqm, and particularly of 100-200 sqm. Cheltenham is the focus for demand in the SLP Area and, as highlighted, there is a lack of stock, particularly higher grade stock outside of a few town centre schemes. Outside of Cheltenham, Gloucester Business Park is the main focus for demand, with more limited local markets in Gloucester city and at Gloucestershire Airport. There is a rural office market across Tewkesbury which is supported by a range of smaller business parks and business centres, on main road locations.

9.19 Leasehold suites are most in demand, although there is a freehold office market. Prime rents achieved were highest in Cheltenham at £24-30/sqft (£258-323/sqm), in high grade town centre/Prominade locations. This compares to £18-20/sqft (£194-215/sqm) in Gloucester, for high grade space in the City Centre or Docks. In Tewkesbury, prime rents of around £18/sqft (£194/sqm) were achieved with key locations including Ashchurch and Tewkesbury business parks as well as town centres.

9.20 Development at West Cheltenham (Golden Valley) is expected to boost demand in the Digital and Technologies sector. Although this scheme will attract some larger inward investment, stakeholders report that companies in this sector tend to enter the Gloucestershire market as start-ups, only requiring offices of 1-6 desks (less than 100 sqm of floorspace) in multi-let scheme. However, they then expand quickly so a lot of grow-on options are needed.

9.21 Digital and Technologies sector growth will generate demand for data centres, however, requirements for these also variable and footloose, subject to regularly changing technology, so not something which can easily be planned for. They do

however, have significant power needs which will need to be considered in any site which might accommodate such a use.

9.22 **It is recommended that sites aimed at meeting office needs be focused towards Cheltenham in the first instance and Gloucester Business Park, Gloucester City Centre and Gloucestershire Airport. Demand is for offices in a mix of sizes, but particularly smaller suites and multi-occupancy facilities. If data centres are a possibility on sites, consideration will need to be given as to how their exceptional power needs could be met (Recommendation Two).**

Industrial/Warehouse Market

9.23 As of April 2026, industrial/warehouse stock in the SLP Area was 98.7 percent occupied by premises numbers and 95.2 percent occupied by floorspace. By floorspace at least, this suggests supply shortages across all three local authority areas.

9.24 Based on past transactions and stakeholder comments, local demand is for industrial and warehouse premises up to 5,000 sqm. In Tewkesbury, requirements are frequently larger, in the 1,000-10,000 sqm range. The most desirable locations for new industrial and warehouse units can be identified as:

- Gloucester - Locations extending west on the A38, to Junction 12, M5
- Tewkesbury - Gloucester Business Park and Gloucestershire Airport. Both have established clusters of Advanced Manufacturing firms.

9.25 In Cheltenham, there is a general need to deliver more modern stock on sites with the best access to the M5 possible. Leasehold premises are most in demand, but there is also a healthy freehold market across the SLP Area. Prime rents in the SLP Area, of £12/sqft (£129/sqm) were recorded at Gloucester Business Park. Elsewhere, rates of £8 - £11/sqft (£86-118/sqm) are the best achieved. Rents at this level should be sufficient to support private development, subject to other cost factors.

9.26 The Advanced Manufacturing sector specifically, requires modern, high grade light

and general industrial stock. Such units may not be different in overall design from standard property (although the internal fit out may be more complex and expensive) but can have a need for power provision above standard. This may create needs for on-site power generation, or at least more direct access to power sources. Advanced Manufacturing inward investment requirements can extend up to 5,000-10,000 sqm and need space for future growth beyond that.

9.27 Demand for logistics premises increased significantly in 2025 across the South West, driven by Third-Party Logistics (3PL) and retail firms. Against high demand, supply remains modest. Although demand is regional, and not particularly focused toward Gloucestershire there is still the opportunity to capture some of this growth in the SLP Area on good quality unconstrained site with strong M5 access, which can compete with other options along the motorway corridor.

9.28 **It is therefore recommended that the SLP seek to provide unconstrained industrial sites, large enough to support units of up to 10,000 sqm, to meet local demand (larger for strategic requirements) in locations including Gloucester Business Park, around Gloucestershire Airport, and along the M5, A38 Corridors (A40, A4019 for Cheltenham). Consideration needs to be given to power supplies and how businesses with above average power needs can be accommodated (Recommendation Three).**

Existing Employment Areas

9.29 67 Employment Areas have been assessed and graded A-E, across the SLP Area, as defined in Table 39. Collectively they provide some 761.1 ha of primarily developed employment land.

Table 39 – Grades A to E Definitions

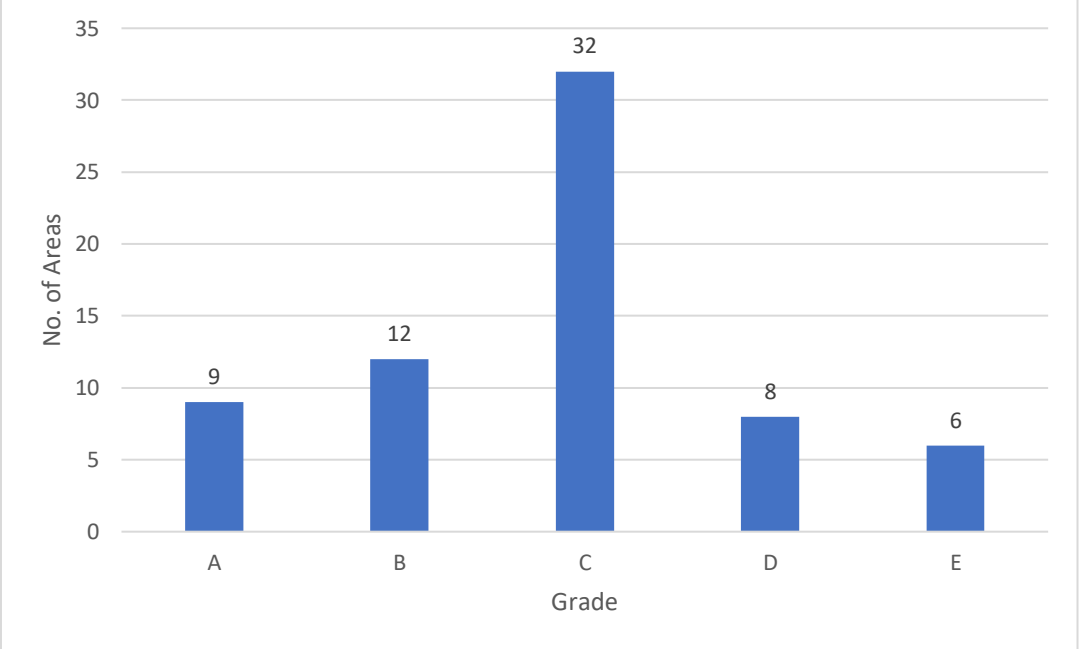
Grade	Definition	Action
A	High quality, prestigious, flagship business areas due to their scale, location and setting. Capable of competing for investment in the regional market place. These are prime sites for marketing to a cross section of users including new inward investors. They can also meet the needs of image-conscious, aspirational companies already in the local authority area	Protect strongly in the SLP Support and expand
B	Good employment sites due to their scale, location and setting. Capable of competing for investment in the sub-regional market place. These are prime sites for marketing to a cross section of users, E(g), B2 and B8, including some new inward investors.	Protect strongly in the SLP Support and expand

Grade	Definition	Action
C	Key employment sites with an influence over the whole local authority area but primarily geared towards local businesses and E(g)(iii) light industrial, B2 and B8 uses.	Protect in the SLP Support
D	Lower quality locations in residential or rural areas suffering from poor accessibility and massing.	Continue to protect/review through the SLP
E	Very poor quality areas. Widespread vacancy and dereliction in poor environments. Or areas which have been, or are in the process of being, lost to other uses.	Promote alternative uses if possible

Source: BE Group 2026

9.30 Figure 23 summarises the Existing Employment Areas by each of the above grades.

Figure 23 – Employment Areas by Grade



Source: BE Group, 2026

9.31 **The 61 Employment Areas graded A-D comprise functioning and well occupied business parks and industrial estates, it is recommended that they be protected in the SLP for E(g)/B-Class uses (Recommendation Four).**

9.32 The nine areas graded A represent the highest quality prestigious, flagship business areas which are best able to compete in the regional and national market place. They already support a range of national (and international) businesses and would be best placed to attract future strategic scale inward investment. These are:

- C1.2 (EM1): GCHQ Benhall, Cheltenham

- C1.3 (EM1): Jessop Avenue, Cheltenham Town Centre
- C1.4 (EM1): UCAS Site, New Barn Lane, Cheltenham
- G1.5: Barnwood, Gloucester
- G1.6: Unilever/Corinium Avenue, Gloucester
- T1.1 (EMP1): Cleeve Business Park (Bishops Cleeve), Tewkesbury
- T1.3 (EMP1): Gloucester Business Park, Brockworth, Tewkesbury
- T1.5 (EMP1): Meteor Business Park (Churchdown / Staverton), Tewkesbury
- T1.6 (EMP1): Ashville Business Park (Churchdown / Staverton), Tewkesbury.

9.33 12 Areas are graded B, three in Cheltenham, five in Gloucester and four in Tewkesbury. These are also good locations for marketing to inward investors but are likely to have a greater focus on meeting local needs. Together the 21 A/B graded areas are the highest value employment clusters in the SLP Area. **It is thus recommended that these locations be strongly protected thin the SLP for E(g)/B-Class uses. Additionally, opportunities to allow their growth, both by expanding the areas, infill development or the upgrading of existing stock should be encouraged (Recommendation Five).**

9.34 In terms of the range of Employment Areas, the following can be noted:

Cheltenham

- Cheltenham is identified as a focus for office sector demand in the SLP Area, including the relevant office-based Key Sectors. However, only C1.3 (EM1): Jessop Avenue, Cheltenham Town Centre offers high grade multi-let offices to meet needs
- In terms of industrial and warehouse stock, Cheltenham is dependent on C1.1 (EM1): Kingsditch Industrial Estate for larger modern units, greater than 1,000 sqm each which can support the activities of established firms
- Elsewhere, local industrial estates are much smaller, around 4 ha or less each, and offer mostly budget or average quality units of sub-1000 sqm which are dominated by trade uses. Such stock continues to meet needs locally, as evidenced by the high occupancy rates, but offers limited choice for businesses, including Advanced Manufacturing firms, seeking modern, high grade stock.

Gloucester

- Gloucester is home to a range of multi-occupancy office schemes, around the city centre and Docks. These are performing well and have seen recent investment and modernisation even if Cheltenham is seen to have stronger demand
- Gloucester has a strong cluster of major production facilities, warehouses, HQ offices and data centres at Corinium Avenue/Eastern Avenue, Barnwood which benefits from a strong link to the M5 via the A417
- The largest industrial stock can be found along Bristol Road and then linking to the A38 extending south west. The quality of accommodation here varies considerably, with older stock along Bristol Road and more modern units along the A38 which stakeholders identify as a focus of market demand
- Unlike Cheltenham there are a number of vacant or underused sites in Gloucester's Employment Areas, some 24 ha in four Areas, which could support further growth.

Given the lack of existing employment land in Gloucester, it is recommended that SLP policy support regeneration and redevelopment plans within Employment Areas of the city which will deliver E(g)/B-Class premises particularly in the Bristol Road/A38 and Barnwood areas which already support substantial high value employment clusters (Recommendation Six).

Tewkesbury

- There is a significant Advanced Manufacturing cluster around Gloucestershire Airport, which is a focus for industrial demand
- Gloucester Business Park is identified as another focus for sub-regional demand. It is home to another high value industrial and warehouse cluster but also the most significant group of larger self-contained offices in the SLP Area
- Employment Areas in Tewkesbury town provide a substantial offer of good and average quality industrial and warehouse premises
- In Bishops Cleeve, T1.1 (EMP1): Cleeve Business Park primarily comprises high value facilities for GE Aerospace. The facility has considerable internal expansion space although this is within a secure location, limiting who can

take up land here

- Tewkesbury has a diverse offer of rural business parks and industrial estates. Industrial schemes dominate, many focused on trade uses, but there are also a number of local office schemes. Almost all appear well occupied and continuing to serve a function, meeting local business needs. Many also have plans for growth associated with them.

Employment Land Supply

9.35 Reviewing relevant JCS and Local Plan Allocations, including mixed use sites, as well as identified planning consents (but not sites subject to undecided planning applications) indicates a realistic employment land supply, across the SLP Area of **87.79 ha or 361,342 sqm in 23 sites.** This reflects the removal of sites unlikely to be developed for E(g)/B-Class uses, likely to be held for specific occupiers or significantly constrained. It also allows for the netting of sites to remove land which will likely provide supporting infrastructure or other uses, reflecting planning consents or using standard criteria.

9.36 Against an OAN of 175.45-190.63 ha or 712,272-800,091 sqm (combined office and industrial needs), deducting this supply gives further requirements of **87.66-102.84 ha or 350,930-438,749 sqm.**

9.37 By local authority area, the realistic supply comprises:

- Cheltenham – 35.02 ha or 139,551 sqm in four sites
- Tewkesbury – 52.77 ha or 221,791 sqm in 19 sites.

9.38 There is no readily available employment land in Gloucester City. This does not mean that no E(g)/B-Class development will occur in the city boundary over the SLP period though. As mentioned, this Study has identified some 24 ha of underused brownfield land within the Employment Areas which may support some growth and other opportunities will also come forward, likely in the Bristol Road area, moving forward.

9.39 The majority of available land is likely to be brought forward for industrial and warehouse uses. Only the JCS Allocations in, or on the edge of, Cheltenham – North West and West Cheltenham – are likely to be developed to meet office needs,

particularly in the Digital and Technologies (Cyber Security) and Defence sectors. An initial Innovation Centre (The National Cyber Innovation Centre) of 15,245 sqm is already being progressed at A7: West Cheltenham with more likely in the short term. These two sites could provide a net supply of 33.64 ha or 134,031 sqm, which could meet the office OAN, at least the smaller need figure. However, it is likely that some of this land will be developed for industrial and warehouse uses, along with technical facilities such as data centres.

9.40 Elsewhere, offices are most likely at Gloucester Business Park which is home to an established office cluster and an identified focus for demand. Existing sites are proposed for industrial and warehouse uses, however. In JCS site A1: Innsworth and Twigworth a 2.77 ha business park, is marketed for Grade A offices as design and build options. If delivered this would help support the Gloucester market although there are questions about the viability of such a scheme, distant from the core market areas of Cheltenham. Gloucester Business Park or Gloucestershire Airport.

9.41 Other land, some **51.38 ha or 216,000 sqm** is likely to be developed primarily for industrial and warehouse uses. In considering this it should be noted that modern industrial and warehouse units frequently include an office component as businesses seek to combine their production, distribution, and administration arms on one site for greater efficiency. For example, the 2023 research paper 'Critical Infrastructure: Driving Employment Growth within the UK's Logistics Sector' by Prologis indicates that an average 46,450 sqm B8 unit will employ 67 office staff and 45 managerial staff. This represented just under a quarter of the 480 total staff employed in that example facility.

9.42 Within the mostly industrial/warehouse supply of Tewkesbury, some sites which might support high value uses, including Key Sectors and logistics, and identified areas of high market demand include:

- Policy A2: South Churchdown (2.81 ha net) – Has the potential to support logistics and Advanced Manufacturing uses, assuming appropriate road access can be provided.
- Policy A3: North Brockworth (10.44 ha net) – Likely to support the logistics sector.

- Policy EMP1: Bamfurlong Industrial Park Extension, Churchdown/Staverton (4.43 ha net) – The site is on the market as CGX Connect Business Park for 30,000 sqm of floorspace, as design and build opportunities. It falls between Bamfurlong Industrial Park, Ashville Business Park and particularly Meteor Business Park, which are key local centres for Advanced Manufacturing with specialisms in Aerospace and Defence linked to Gloucestershire Airport. Further high quality premises here provides a strong opportunity to grow this local cluster. There is another 0.60 ha of infill land at Bamfurlong Industrial Park.
- Policy EMP2: Brockeridge Farm Business Centre Extension, Twyning (11.03 ha) – Now has consent for 33,329 sqm of warehousing premises on a strategic location close to Junction 1, M50.
- Cleeve Business Park, Bishops Cleeve – 6.15 ha (net), in two sites, is available within the high value GE Aerospace facility which could support the further growth of Advanced Manufacturing industries within the SLP Area.
- Gloucester Business Park – 5.91 ha (net) is available in five sites, to allow the growth of this significant regional business park, which accommodates clusters of Advanced Manufacturing and Professional and Business Services/Financial Services companies.

9.43 **It is recommended that the current realistic employment land supply in the SLP Area be identified as 87.79 ha or 361,342 sqm in 23 sites. The outstanding requirement to be met is therefore 87.66-102.84 ha or 350,930-438,749 sqm. It is also recommended that land be allocated to meet this further need (Recommendation Seven).**

9.44 **Of the available supply, 51.38 ha or 216,000 sqm is likely to be developed almost exclusively for industrial/warehouse uses, leaving outstanding industrial land requirements of 101.8 ha or 396,636. It is recommended that other land be identified to meet this requirement. As noted, Gloucester Business Park, around Gloucestershire Airport, and along the M5, A38 Corridors (A40, A4019 for Cheltenham) are the recommended areas of search for new opportunities. The former two do have some existing supply, while there is little along the main road corridors (Recommendation Eight).**

9.45 **Strategic sites in Cheltenham are likely to meet the bulk of the office requirement, but some shortfall against OAN remains likely and it is recommended that other sites with office capacity are made available (Recommendation Nine).**

Future Employment Sites

9.46 Alongside the existing supply, this Study has reviewed 40 Call for Sites submissions where B-Class employment uses are proposed, either individually or as one of several possible uses. These have been appraised and graded A-E, as defined in Table 40.

Table 40 – Grades A to E Definitions

Grade	Definition	Recommendation
A	Site has no large-scale constraints It is well placed, and of a size, to meet strategic demand and attract inward investment Site is in developer control, or has other strong indications of deliverability early in the Plan Period	Subject to other considerations, site represents a strong candidate for inclusion in the SLP to meet strategic needs for E(g)/B2/B8 uses, and attract inward investment
B	Site has no large-scale constraints It is well placed, and of a size, to meet local demand It meets defined market needs in a relevant geographic area Site is in developer control, or has other indications of deliverability early in the Plan Period	Subject to other considerations, site represents a strong candidate for inclusion in the SLP to meet local needs for E(g)/B2/B8 uses
C	Few/moderate site constraints Site could meet demand but: 3. Site would likely see pressure for other uses or a mixed use scheme, or 4. Size and position mean that it is most likely to support the growth/relocation of a single firm	Consider for allocation to meet needs. However: 1. Greater conformation that the site will be developed for employment uses, or an acceptable mix of uses would be needed 2. If take up tied to a single firm, it may be preferable to review applications for growth of that firm on a case by case basis through the planning system

Grade	Definition	Recommendation
D	Site constraints What demand exists primarily for lower value uses – waste, open storage, etc. Conversely, higher demand but likely insufficient to overcome site constraints. Moderate evidence that B-Class uses would be deliverable here in Plan Period	Low priority for B-Class allocation. Subject to further review may suit other uses.
E	Significant site constraints Location and size offer negligible scope for meeting local demand or supply gaps Significant barriers to delivery	Do not allocate for E(g)/B2/B8 /B2/B8 uses.

Source: BE Group, 2026

9.47 Table 41 shows the grading breakdown of sites.

Table 41 – Site Submissions Appraisal by Category

Category	Number of Sites	Land Supply, ha*	Floorspace Capacity, Sqm	Comments
A Key Strategic Development Options	9	211.28	839,182	Includes Sites at Gloucestershire Airport: • T3.2/T3.3 (CHU015/ CHU035): Parton Farm/ Evergreen Nurseries, Parton Road (Function as a single site) • T3.5 (CHU039): Land at Gloucestershire Airport • T3.33 (DOW010): Land North of Ashville Business Park And around J10, M5: • T3.7/ T3.8 (ELM011/ ELM003): Land NW of Junction 10 of M5 at Hardwicke/ Stanboro Nurseries (Function as a single site) • T3.12 (BOD013D): Land around Boddington (Site D)
B Key Local Development Options	8	56.74	227,215	Smaller and sometimes more constrained options at Gloucestershire Airport; at J10, M5; at J1, M5; around Tewkesbury town plus one further option at Twigworth.
C Potential Local Supply (subject to Other Issues)	16	361.04	1,445,320	Other, secondary local options which could be reviewed further if required.
D Limited suitability for B-Class Uses	4	53.84	215,360	Based on market fit/deliverability, sites are poorly suited for employment development. This does not preclude the possibility that they are suited for other uses.

Category	Number of Sites	Land Supply, ha*	Floorspace Capacity, Sqm	Comments
E Unlikely to be deliverable development site	-	-	-	-
Sites already reviewed as Existing Employment Land Supply/Consented for Other Uses	3	-	-	-
TOTAL	**40**	**682.9**	**2,727,077**	

Source: BE Group, 2026 *Measured on a net basis.

9.48 Of a potential (net) supply of 682.90 ha, 268.02 ha (1.066 million sqm) of supply is available in the Call for Sites options graded A or B, which are judged to be the highest value strategic and local sites. This exceeds the up to 103 ha or 438,749 sqm of additional supply required to meet the OAN, **so recommended options within those 17 sites to focus on are:**

- **40.85 ha (net) in four A graded sites, located north and west of Gloucestershire Airport (see Table 41). These have capacity for 157,462 sqm. Accessible to both Gloucester and Cheltenham and building on a strong established cluster of Advanced Manufacturing businesses with a focus on Aerospace and Defence. Gloucestershire Airport is an identified focus of demand. Development here would likely be focused on industrial uses but there could be scope for associated administrative offices. There are other B graded options in this area which could also be considered, as needed**
- **106.93 ha (net) in three of the larger sites around Junction 10, M5 (see Table 41). 427,920 sqm of capacity. Smaller sites here are again graded B. While there is no existing business cluster here, these sites have the best links to the M5 Corridor of any options put forward (with further junction upgrades underway) as well as direct A-road links into Cheltenham. A development here would suit industrial and particularly logistics uses which need direct M5 access but again could support office options reflecting linkages to the Cheltenham market (Recommendation Ten).**

Appendix 1

List of Consultees

Appendix 1 – List of Consultees

Alder King

Cheltenham Borough Council

Colliers

Fisher German

Gloucester City Council

Gloucestershire County Council

Homes England

Knight Frank

Lambert Smith Hampton

LDA Design

Savills

Tewkesbury Borough Council.

Appendix 2

Cheltenham Employment Site Proformas

Appendix 2 – Cheltenham Employment Site Proformas

JCS Sites

Name (Address)	North West Cheltenham
Reference	Policy A4, JCS
Description	L-sharded area of greenfield land, extending north west grom Gallagher Retail Park and Kingsditch Trading Estate along the A4019 Tewkesbury Road towards the M5. The site includes several homes along the A4019, while land in the north east is now being developed for housing as Regents Village. Part of a much larger strategic site extending north and west from the Cheltenham settlement boundary. The site crosses the administrative boundary between Tewkesbury and Cheltenham.
Size, ha	23.4
Ownership (Developer, occupier, where relevant)	Six owners across the wider strategic site. Land identified for employment is mostly owned by Gloucestershire County Council and Persimmon Homes. Elms Park Consortium comprising Persimmon and Bloor Homes is the developer.
Current use	Agriculture/Residential
Market availability	Not Available
Planning status	Adopted allocation in the JCS – Policy A4 The wider site has Outline Consent (subject to the signing of a 106 agreement) "for up to 4115 new homes providing a range and choice of mix and tenure, including affordable housing (C3) and elderly persons accommodation (C2/C3 up to 200 units), 24 ha of employment generating uses including 10 ha B1 business park (up to 40,000 sqm), a hotel (C1 up to 200 rooms), and mixed use centres providing retail uses and community facilities (A1 - A5 up to 6,150 sqm, D1/D2 up to 3,000 sqm), a transport hub and public transport inter change, primary and secondary school education (D2), new areas of green infrastructure including areas of play sports hub, woodland planting, allotments and habitat at creation, creation of new means of access onto Tewkesbury Road and Manor Road, new footways and cycleways, and energy and drainage infrastructure."
Proposal	The initial scheme, known as Elms Park, was progressed by Persimmon and Bloor Homes. Housing is now being delivered here. The core employment area is identified as 'Elms Park Centre of Enterprise', a high quality Business and Enterprise Park. It will be delivered within Phase 1 of the wider scheme Elms Park Consortium has overall responsibility for delivery, but it is unclear who will ultimately develop the employment premises and to what exact timeframe. It is noted that Gloucestershire County Council owns the A4019 Tewkesbury Road land so is in a position to push forward commercial development here.
Links to Economic Clusters	The aspiration is for a high quality business park, which will build on the growing Digital and Technologies/Defence cluster to be brought forward in West Cheltenham. However, it will likely broaden out to bring in other sectors such as Advanced Manufacturing, Financial Services, Digital and Technologies and Professional and Business although this will be subject to more detailed information on the nature of the business park to be delivered. Overall, this land is in a strong location on the A4019 Corridor which links many of Cheltenham's existing Employment areas, and the town centre, to J10, M5. This Corridor is likely to be a focus for local growth.

Name (Address)	**North West Cheltenham**
Site Constraints	• Trees onsite • Housing onsite • Houses and farms onsite • Includes areas of land subject to surface water flooding (Other areas of Flood risk are outside of the employment area).
Other information	-
Site Scoring	72
Conclusions/Recommendations	Key strategic site. The principle of development is now established here but it is recommended that more clarification be sought here as to who, to what timetable and with what resources, will be responsible for delivering the employment elements. The site should be protected for E(g)/B-Class uses in the SLP.
Availability, years	5-10

Name (Address)	West Cheltenham
Reference	Policy A7, JCS
Description	A band of agricultural land, including two farm buildings on the western margins of Cheltenham, specifically the Fiddlers Green neighbourhood and close to the GCHQ building.
Size, ha	45.0 (19.6 ha of land net)
Ownership (Developer, occupier, where relevant)	Multiple including Cheltenham Borough Council, Highways Gloucestershire, Private Individual (Developer is HBD Golden Valley, part of Henry Boot)
Current use	Agriculture
Market availability	Not Available
Planning status	Adopted allocation in the JCS – Policy A7 Outline Consent for a phased development to provide non-residential floorspace comprising flexible commercial and community uses (Use Classes E, F and Sui Generis), new homes (Use Class C3) and other associated infrastructure (App. No. 23/01875/OUT) Reserved Matters consent for Reserved Matters (layout, scale, appearance, landscaping and access) for Phase 1 of development, an Innovation Centre with ancillary cafe and event spaces, a Mobility Hub) with flexible retail and community uses on the ground and first floor, and all associated infrastructure and open spaces (App. No. 26/00001/REM). Approved in April 2026. Multiple Discharge of Conditions consents.
Proposal	The Golden Valley development The Outline Consent, which covers the whole site proposes 298 flats, 278 houses and 92,985 sqm of commercial space which includes 77,871 sqm of E(g) class offices, research and development and light industry. At a standard developer ratio, 77,871 sqm would require 19.6 ha of land. The Full Consent proposes the three story Innovation Centre (The National Cyber Innovation Centre) of 15,245 sqm as an early phase of development. It will be located in the centre of the site, accessed off the existing roundabout junction of Fiddlers Green Lane and Telstar Way. Contractors have been appointed on this project which is expected to commence in summer 2026. Council officers report that discussions are underway with a range of business occupiers for this scheme, but further details remain confidential at this time. The scheme benefits from a £104 million funding package, including £20 million from the UK government, complemented by private sector investment.
Links to Economic Clusters	Focused on Cyber Industries the new facilities will accommodate a diverse range of companies, linked to Digital and Technologies and overlapping with Defence, other service sectors and likely Advanced Manufacturing.
Site Constraints	• Trees on Site • Parts of the site are subject to surface water flooding • Housing adjacent, with existing farms in the area
Other information	-
Site Scoring	79
Conclusions/Recommendations	Key strategic site for the SLP Area and particularly a key future source of modern office premises which may prove difficult to viably deliver elsewhere. It will be essential for the growth of Digital and Technologies in the sub region. Development is consented and a phase one scheme is being actively progressed. It should be protected for relevant uses in the SLP.
Availability, years	1-5

Other Sites

Name (Address)	**Land adjacent to B&Q, The Reddings (Includes Land Rear of Nuffield Hospital, Hatherley Lane A and B)**
Reference	Local Plan Policy EM1, E2
Description	This site is located in the southwestern side of Cheltenham, off Hatherley Lane. It is made up of two undeveloped plots, a western section (B) and an eastern section (A). The eastern section accommodates storage containers for Blue Bear Self Storage while the west is vacant. There is a large, modern multi-occupancy office building to the north.
Size, ha	0.86
Ownership (Developer, occupier, where relevant)	Claxton Trading Ltd, Pooks Investment Ltd, Kier Construction Ltd
Current use	Eastern section being used as self-storage and western section is vacant
Market availability	Not Available
Planning status	Local Plan Site – EM1, E2 • Site A: Full consent, now implemented, for a change of use to a self-storage yard (B8), erection of storage units and associated works, including new boundary fencing, car parking and landscaping (App. No. 24/01666/FUL) • Site B: Full consent for a 3,384 sqm of office headquarters (App. No. 12/01488/FUL).
Proposal	The consented office was on the market as a development opportunity, marketed as Hatherley Place by agents Lamber Smith Hampton and Alder King for several years from 2021, but is not marketed anymore. It is not clear if there are any further plans for this land other than the current self-storage use.
Links to Economic Clusters	The adjacent office building, a multi let Pure Office scheme, accommodates a range of micro firms in Financial Services, Digital and Technologies and Professional and Business Services. Cheltenham Film Studios are also close by, as is GCHQ and this site could be developed to support these facilities, particularly accommodating micro and small firms, even if viability is likely to be a barrier to an office development.
Site Constraints	• Parts of site may be susceptible to surface water flooding
Other information	-
Site Scoring	63
Conclusions/Recommendations	Site has a temporary use on it, but remains available for long term development, building on a range of facilities in the immediate area. It should be protected for E(g)/B-Class uses in the SLP.
Availability, years	5-10
Name (Address)	**Land at Chelt Walk, Town Centre**
Reference	Local Plan Policy EM1, E4
Description	A large backland public car park, accessed via the roundabout with Jessop Avenue, and adjacent to a row of modern high grade offices along Jessop Avenue.
Size, ha	0.68
Ownership (Developer, occupier, where relevant)	Cheltenham Borough Council, BW SIPP Trustees
Current use	Car parking
Market availability	Not Available
Planning status	Local Plan Site – EM1, E4 The eastern part of the car park, partly unserviced, is a temporary car park with consent for this ending in 2026 (App. No. 23/01314/FUL) No applications/consents for development.

Name (Address)	**Land adjacent to B&Q, The Reddings (Includes Land Rear of Nuffield Hospital, Hatherley Lane A and B)**
Proposal	No identified development plans, but the site remains available and mostly under Council ownerships adjacent to some the highest grade office buildings in Cheltenham.
Links to Economic Clusters	Links to an established office cluster which accommodates a range of high value service uses in Financial Services, Professional and Business Services plus a range of Digital and Technologies companies such as Iress. A new office development here, although potentially difficult to deliver viably here, could build on this inner urban cluster.
Site Constraints	• Grade II listed building adjacent • Within a Conservation Area • Has a Public Right of Way runs though it • Site is in Flood Zones 2/3 • Parts of site may be susceptible to surface water flooding.
Other information	-
Site Scoring	56
Conclusions/Recommendations	No development plans, but this remains a valuable Council-owned development site adjacent to a key office cluster. It should be protected for E(g)/B-Class uses in the SLP.
Availability, years	10-15

Name (Address)	**Landsdown Industrial Estate**
Reference	Local Plan Policy H2, MD1
Description	This site is located west of Cheltenham City centre and is north of Cheltenham Spa train station. The site is bound on the east by train lines, southwest by Roman Road (with a row of houses between the road and site) and northwest by Rowanfield Road (with a row of houses between the road and site). It comprises an active industrial estate, tightly bound by other uses.
Size, ha	5.50
Ownership (Developer, occupier, where relevant)	Cheshire West and Chester Borough Council
Current use	Industrial Estate
Market availability	Not Available
Planning status	Mixed Use Local Plan Allocation The east of the area, 2.76 ha is subject to an undecided planning Outline planning application for up to 215 dwellings with associated access roads, parking and public open space following the demolition of the existing buildings (App. No. 21/02832/OUT). Outlie consent for mixed use redevelopment of Units 23 and 30 Lansdown Industrial Estate including net 425 sqm of commercial uses (Class E(g), B2 and B8) (linked with above application).
Proposal	The housing application covers the eastern portion of the Industrial Estate, which comprises the bulk of the older low quality premises. Overall, the proposal will result in the loss of 30,472 sqm of floorspace. The Outline Application remains undecided at this time but does have an officers recommendation to approve and is understood to be awaiting conclusion of a Section 106 agreement. For the purposes of this Study it is therefore assumed that this scheme will come forward. Much of the remainder of the Industrial Estate has been recently refurbished – nine units totalling 8,500 sqm – so is unlikely to be redeveloped. Future plans include the redevelopment of three low grade units to create two new units of around 288 sqm each, together with physical enhancements to the entrance to the Estate, improvements to public accessibility between the Estate and Roman Road. Also the development of some 604 sqm of new build employment space, some of which will provide a direct replacement for existing poor quality space elsewhere on the estate. Overall, however plans suggest a net loss of employment land and floorspace, from the housing development with the new units proposed mostly replacing existing properties. As such the gains here cannot be considered additional supply and are not counted towards the employment land/premises supply totals.
Links to Economic Clusters	-
Site Constraints	-
Other information	-
Site Scoring	-
Conclusions/Recommendations	-
Availability, years	-

Name (Address)	**Royal Well and Municipal Offices**
Reference	Local Plan Policy H2, MD3
Description	This site is located within the city centre; it contains 2 buildings (Cheltenham Coach Station and Cheltenham Borough Council Municipal Offices) and a car park to the south of the coach station. Bisecting this site is Royal Well Road. On the western side of Royal Well Road is Royal Well Place, this spits the car park with the coach station.
Size, ha	0.90
Ownership (Developer, occupier, where relevant)	Cheltenham Borough Council
Current use	Council offices, bus station and car park
Market availability	Not available
Planning status	Local Plan Site – H2, MD3 No relevant planning applications/consents
Proposal	A Masterplan has been produced incorporating the Municipal Buildings, Royal Well Road, Promenade and the Long Gardens. This does not appear to propose any E(g)/B-Class employment in this area with the Municipal Offices to become a 125-room spa hotel, event space, and banqueting venue. It is thus assumed that relevant floorspace will not be provided here and it cannot be counted within the employment land supply.
Links to Economic Clusters	-
Site Constraints	-
Other information	-
Site Scoring	-
Conclusions/Recommendations	-
Availability, years	-

Appendix 3

Employment Sites Grading

Appendix 3 – Existing Employment Site Grading System

Sustainability and Accessibility	Location	Proximity to strategic highway network (M5, M50, A38, A40, A46, A48, A417, A435, A436): • Site/Area 0 km from a strategic road – score 10 • Site/Area 0.5 km from a strategic road – score 9 • Site/Area 1.0 km from a strategic road – score 8 • For each further half km distance from a strategic road, reduce score by one point, i.e. any site 5.0 km or further from a strategic road scores zero.
	Prominence	• Site/Area adjacent to, and visible from M5, M50, A38, A40, A46, A48, A417, A435, A436 score 10/9 • Site/Area adjacent to, and visible from other A road – score 8/7 • Site/Area adjacent to, and visible from B road – score 6/5 • Site/Area has local prominence, e.g. within its industrial location – score 4/3 • Site/Area located in 'backlands' or rural area – score 2/1/0
	Public Transport	• Site/Area close to bus route (within 0.5 km) and near to rail station (within 2 km) – score 10 • Site/Area within 0.5 km of a bus route – score 5 • Limited public transport – score 0
	Sequential Test	• Within urban area – score 10 • Urban fringe (close to settlement development boundary) – score 7 • Rural location (away from settlement development boundary) – score 3
Growth Prospects		• If site has development partners associated with it, identified development plans (consented/unconsented) and/or businesses looking to locate there – score 10 • If site has development partners associated with it, identified development plans, but no confirmed occupiers – score 8 • If site is promoted for employment but without linked development partners or clear development plans – score 6 • If site is available for development, subject to planning, but not being promoted – score 4 • If site is being promoted, formally or informally, for non-employment uses – score 0.
Site Conditions	Services Availability	• If all services are provided and in place – score 10 • If priority services are available with no abnormal costs – score 7 • If all priority services are available, but with abnormal costs – score 3 • Some services are unavailable – score 0
	Constraints	May be physical (including access). planning, or legal Reduce score by 2 for each constraint If there are none – score 10
	Environmental Setting	Subjective, score 0 to 10, examples: • Good quality business park/greenfield location – score 10 • Moderate quality industrial estate – score 5 • Poor quality industrial estate/in-fill location – score 2

	Flexibility	Subjective, score 0 to 10: Score site in terms of site shape and ability to sub-divide to suit smaller occupiers. Score Areas in terms of scale and capacity to accommodate business properties of deferent sizes and uses – large warehouse, industrial, office, etc. Consider the site within its context/category. Score 10 if it is flexible, 0 if it is inflexible.
Site Availability		• Site available to develop within 0-1 year – score 10 • Site available to develop within 1-5 years – score 8 • Site available to develop 5-10 years – score 6 • Site available to develop 10-15 years – score 2 • Site available to develop 15+ years – score 0

Source: BE Group, 2026

Appendix 4

Existing Employment Sites Scoring

Appendix 4 – Existing Employment Sites Scoring – Cheltenham

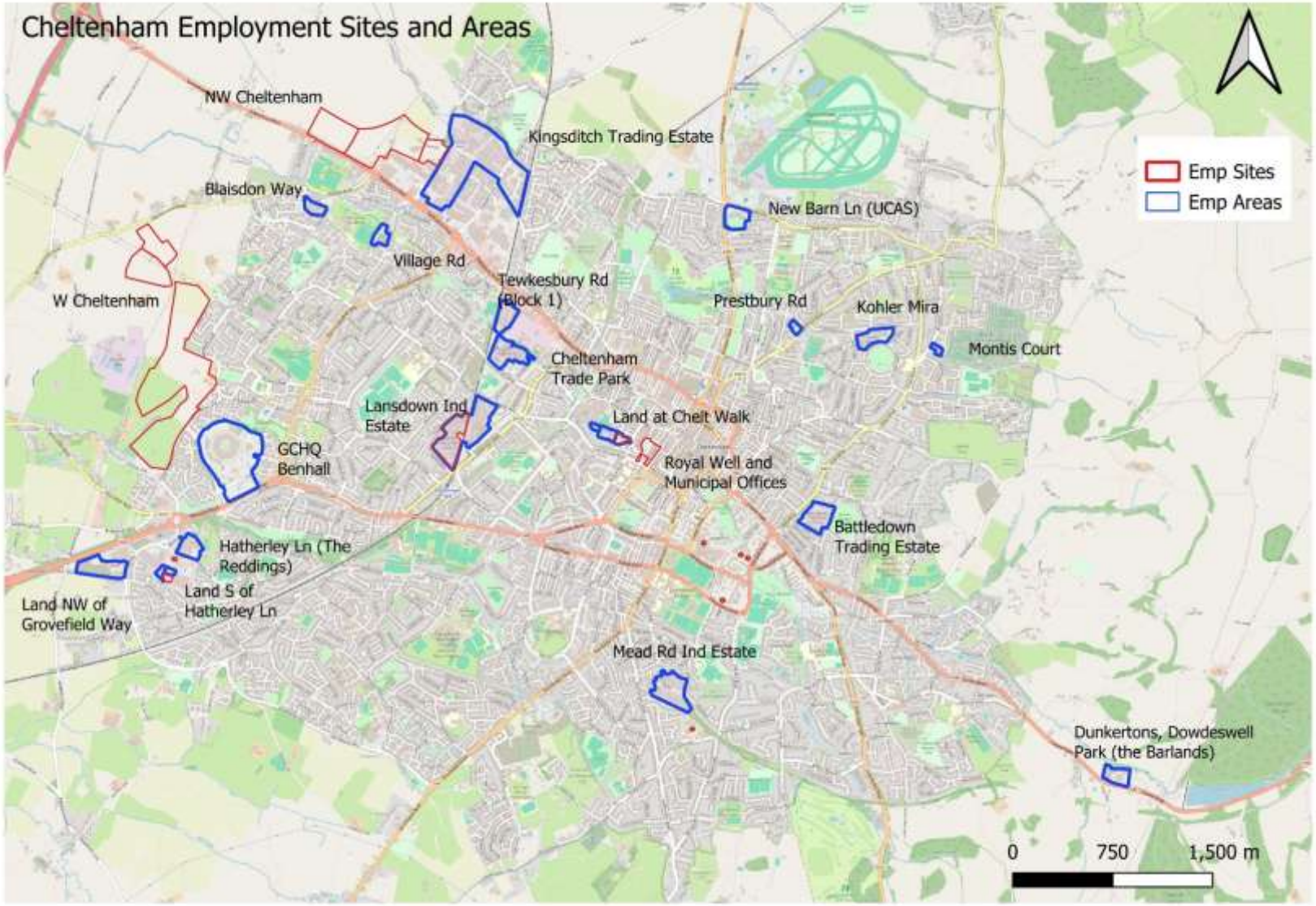
Site ID	Site Name (Adress)	Location	Prominence	Public Transport	Sequential Test	Growth Prospects	Services Availability	Constraints	Environmental Setting	Flexibility	Site Availability	Total
Policy A7, JCS	West Cheltenham	9	4	10	7	10	7	4	10	10	8	79
Policy A4, JCS	North West Cheltenham	6	8	10	7	8	7	2	8	10	6	72
Local Plan Policy H2, E2	Land adjacent to B&Q, The Reddings (Includes Land Rear of Nu	9	2	5	10	4	10	8	7	2	6	63
Local Plan Policy EM1, E4	Land at Chelt Walk, Town Centre	9	4	5	10	4	10	0	10	2	2	56

Appendix 4 – Existing Employment Sites Scoring – Tewkesbury

Site ID	Site Name (Adress)	Location	Prominence	Public Transport	Sequential Test	Growth Prospects	Services Availability	Constraints	Environmental Setting	Flexibility	Site Availability	Total
Local Plan Policy EMP2	Highfield Farm Extension, Elmstone Hardwicke	10	10	5	3	10	7	8	5	4	8	70
	Land South of Lobleys Drive, Gloucester Business Park (Plot 4)	6	4	5	10	8	7	8	10	3	8	69
	Land west of Pioneer Avenue, Gloucester Business Park (Plot 2100 or Plot 5)	6	4	5	10	8	7	8	10	2	8	68
Local Plan Policy EMP1	Bamfurlong Industrial Park Extension, Churchdown/Staverton	6	6	5	3	10	7	6	10	6	8	67
	Land south of Hurricane Road, Gloucester Business Park (Plot 3)	6	4	5	10	8	7	8	10	1	8	67
Policy A1, JCS	Innsworth and Twigworth	10	10	5	7	8	7	2	6	5	6	66
Local Plan Policy EMP1	Blackburn Road, Cleeve Business Park	10	9	5	7	4	7	8	7	7	2	66
Local Plan Policy EMP1	Miles Road, Cleeve Business Park	10	10	5	7	4	7	8	7	3	2	63
Local Plan Policy EMP2	Highnam Business Centre, Highnam	8	6	5	3	10	7	4	9	2	8	62
Policy A1, JCS	South Churchdown	10	4	7	7	4	7	0	10	10	2	61
Policy A3, JCS	North Brockworth	10	10	5	7	4	7	4	8	4	2	61
	Land east of Hurricane Road	6	3	5	10	4	7	8	10	1	6	60
	Golf Club Lane, Gloucester Business Park (Includes Plot 2)	6	3	5	10	8	7	4	10	1	6	60
Local Plan Policy EMP2	Brockeridge Farm Business Centre Extension, Twyning	10	9	0	3	8	7	2	9	4	6	58
Local Plan Policy EMP1	Bamfurlong Industrial Park, Churchdown/Staverton	3	5	5	3	4	7	10	9	2	8	56
Local Plan Policy EMP2	Tewkesbury Business Park, Tewkesbury	10	4	5	10	4	7	10	5	1	0	56
Local Plan Policy, EMP2	Park Farm Industrial Estate Extension, Gretton	1	5	5	3	8	7	6	8	3	8	54
Local Plan Policy EMP2	Duddage Manor Business Park, Twyning	9	3	0	3	8	7	8	6	2	6	52
Local Plan Policy EMP2	Withytrees Farm Extension, Winchcombe	0	6	5	4	4	7	4	4	1	2	37

Appendix 5

Cheltenham Employment Areas and Sites Map


Cheltenham Employment Sites and Areas
NW Cheltenham
Kingsditch Trading Estate
Blaisdon Way
New Barn Ln (UCAS)
Village Rd
Tewkesbury Rd (Block 1)
W Cheltenham
Prestbury Rd
Kohler Mira
Montis Court
Cheltenham Trade Park
Lansdown Ind Estate
Land at Chelt Walk
GCHQ Benhall
Royal Well and Municipal Offices
Battledown Trading Estate
Hatherley Ln (The Reddings)
Land S of Hatherley Ln
Land NW of Grovefield Way
Mead Rd Ind Estate
Dunkertons, Dowdeswell Park (the Barlands)
Emp Sites
Emp Areas
0
750
1,500 m

Appendix 6

Cheltenham Employment Area Proformas

Appendix 6 – Cheltenham Employment Area Proformas

Name (Address)	**Kingsditch Industrial Estate** (Including EM1 Protected Site Runnings Road (Kingsditch Trading Estate, Block 1 and Blocks 5-7**)**
Reference	C1.1 (EM1)
Description	A large industrial estate filled with warehouse and industrial businesses. The area is accessed off the main A4019 Tewkesbury Road and is dominated by trade uses, interspersed with larger B2/B8 facilities in the north west.
Key Occupier(s)	UBICO, Protyre, Screwfix, Spirax Sarco, VarDAR Systems, Inchcape Volkswagen, Engineered Systems
Dominant Uses/Business Sectors	Dominated by trade and motor trade uses, but includes a modest cluster of general and Advanced Manufacturing uses in the north west
Links to Key Economic Clusters	Includes a cluster of Advanced Manufacturing business in the north west including Spirax Sarco and Engineered Systems. This provides a modest cluster which the adjacent Policy A4: North West Cheltenham proposals can build upon.
Percentage Occupied	99
Size, ha	52.1
Building Age	1990-2000 (mostly), some modern development in the north
Building Quality	Average
Area Constraints	• The north of the Area is in Flood Zones 2/3 • Includes areas of land at risk from surface water flooding
Opportunities for Expansion/Regeneration	Existing Area appears fully developed. Policy A4: North West Cheltenham is located to the west and will be the focus of further growth.
Other Information	-
Recommendation	Reasonable quality employment area, which has seen some recent development, albeit for trade uses which can be found throughout the area now, not just on land excluded from the existing allocation. It does also include a cluster of higher value manufacturing and engineering firms in the north west which should be a priority for protection in the SLP.
Grading	B

Name (Address)	**GCHQ Benhall** (Including EM1 Protected Site Gloucester Road, Benhall, GCHQ)
Reference	C1.2 (EM1)
Description	A large circular office building housing the UK's cyber security agency, surrounded by extensive car parking in a mostly residential area.
Key Occupier(s)	GCHQ
Dominant Uses/Business Sectors	Cyber security/ ICT
Links to Key Economic Clusters	A focus for Digital and Technologies and Defence activities in Cheltenham. Proposals at Policy A7: West Cheltenham will develop to support and expand upon its operations.
Percentage Occupied	100
Size, ha	19.5
Building Age	2000s-2010s
Building Quality	Good
Area Constraints	• Surrounded by housing • Includes areas of land at risk from surface water flooding
Opportunities for Expansion/Regeneration	Site in full use
Other Information	-
Recommendation	Site for a major employer of national significance, key to further growth in Cheltenham. It should be protected in the SLP for E(g)/B-Class uses.
Grading	A

Name (Address)	**Jessop Avenue, Cheltenham Town Centre** (Including EM1 Protected Site Jessop Avenue / St James Square)
Reference	C1.3 (EM1)
Description	Three high grade, multi store and multi occupancy office buildings, centrally located in Cheltenham.
Key Occupier(s)	West Healthcare, Salpo Technologies, Agilis Recruitment, Byrd + Link, Iress, Attivo
Dominant Uses/Business Sectors	Key office cluster in central Cheltenham
Links to Key Economic Clusters	Accommodate a diverse range of businesses in sectors including Professional and Business Services, Financial Services, Digital and Technologies as well as some healthcare businesses.
Percentage Occupied	100
Size, ha	1.10
Building Age	1990-2010
Building Quality	Good
Area Constraints	• Land is in Flood Zones 2/3 • In a Conservation Area • Includes areas of land at risk from surface water flooding
Opportunities for Expansion/Regeneration	Adjacent car parking comprises allocated Local Plan Site E4: Land at Chelt Walk, Town Centre (0.68 ha).
Other Information	-
Recommendation	Identified by stakeholders as a key source of Grade A offices, not readily found elsewhere and serving the whole SLP Area, and beyond. This area should be protected for E(g)/B-Class uses in the SLP. The current area boundary excludes St James House which has recently been refurbished to provide Grade A offices. This should be included in a future allocation.
Grading	A

Name (Address)	**UCAS Site, New Barn Lane, Cheltenham** (Including EM1 Protected Site New Barn Lane (UCAS))
Reference	C1.4 (EM1)
Description	Large, secure modern brick built office complex for UCAS, in a residential area.
Key Occupier(s)	UCAS
Dominant Uses/Business Sectors	Education
Links to Key Economic Clusters	Education/administrative use, distant from other clusters.
Percentage Occupied	100
Size, ha	2.73
Building Age	1990-2010
Building Quality	Good
Area Constraints	• Includes areas of land at risk from surface water flooding • Housing adjacent
Opportunities for Expansion/Regeneration	Offices include gardens which could be built upon, but this would impact on the amenity of the existing office and adjacent housing.
Other Information	-
Recommendation	Office for a major employer of national significance. This area should be protected for E(g)/B-Class uses in the SLP.
Grading	A

Name (Address)	**Tewkesbury Road - Neptune Business Centre / Cheltenham Trade Park / Space Business Centre** (Including EM1 Protected Site Tewkesbury Road (Block 1))
Reference	C1.5 (EM1)
Description	Modern industrial park, focused on trade uses, prominently located off the A4019 Tewkesbury Road and offering mostly smaller units. Includes Space Business Centre which comprises small modern workshops for local micro businesses.
Key Occupier(s)	Cheltenham & Gloucester Flowers, Clay & Rock, Albany Windows
Dominant Uses/Business Sectors	Primarily trade uses
Links to Key Economic Clusters	No strong links to Key Clusters.
Percentage Occupied	80
Size, ha	3.29
Building Age	1990-2010
Building Quality	Average
Area Constraints	• Most of the area is in Flood Zones 2/3 • Includes areas of land at risk from surface water flooding.
Opportunities for Expansion/Regeneration	Includes a car yard in the south, of 0.22 ha which could support a small infill development. Undeveloped land to the south east appears to form part of a larger infrastructure facility for Wales and West Utilities.
Other Information	-
Recommendation	Local industrial estate, dominated by trade uses in the north, but accommodating a valuable supply of modern workshops in the south. This area should be protected for E(g)/B-Class uses in the SLP.
Grading	C

Name (Address)	**Cheltenham Trade Park** (Including EM1 Protected Site Cheltenham Trade Park)
Reference	C1.6 (EM1)
Description	Modern industrial park, focused on trade uses, prominently located off Arle Road and with housing adjacent.
Key Occupier(s)	Denmans, Plumbase, Service Graphics
Dominant Uses/Business Sectors	Wholesaled and retail trade
Links to Key Economic Clusters	No strong links to Key Clusters.
Percentage Occupied	100
Size, ha	4.30
Building Age	1990s-2000s
Building Quality	Average
Area Constraints	• Includes areas of land at risk from surface water flooding • Housing adjacent.
Opportunities for Expansion/Regeneration	Site fully developed
Other Information	-
Recommendation	Area has a trade focus but still provides a valuable range of mid-sized units suitable for B2/B8 uses. This area should be protected for E(g)/B-Class uses in the SLP.
Grading	C

Name (Address)	Battledown Trading Estate and Coltham Fields
Reference	C1.7
Description	Small urban industrial estate, of average quality mid-sized units in the east of Cheltenham.
Key Occupier(s)	Outlook Bespoke, Steer Cheltenham, Howdens
Dominant Uses/Business Sectors	Trade, Motor Repair, Construction
Links to Key Economic Clusters	Some construction uses which may support key sectors but generally limited links.
Percentage Occupied	100
Size, ha	4.19
Building Age	1945-1990
Building Quality	Average
Area Constraints	• Includes areas of land at risk from surface water flooding • Housing adjacent
Opportunities for Expansion/Regeneration	Site fully developed
Other Information	-
Recommendation	Area has a trade focus but still provides a valuable range of mid-sized units suitable for B2/B8 uses. This area should be protected for E(g)/B-Class uses in the SLP.
Grading	C

Name (Address)	**Mead Road Industrial Estate including Churchill Trading Estate, Liddington Trading Estate and Maida Vale Business Park.**
Reference	C1.8
Description	Small scale, mixed local industrial estate, dominated by trade and motor repair uses comprising units in a mix of sizes, in a mostly residential area.
Key Occupier(s)	Travis Perkins, Leckhampton Autocentre, Fixaball, Cotswold Plumbing & Heating Supplies
Dominant Uses/Business Sectors	Trade, Motor Trade, some manufacturing of fastenings and labels
Links to Key Economic Clusters	Area includes some traditional industrial uses but has limited links to Key Sectors.
Percentage Occupied	100
Size, ha	2.46
Building Age	Mixed
Building Quality	Average
Area Constraints	• Includes areas of land at risk from surface water flooding • Housing adjacent
Opportunities for Expansion/Regeneration	Site fully developed
Other Information	-
Recommendation	Site has a trade focus but still provides a valuable range of mid-sized units suitable for B2/B8 uses. This area should be protected for E(g)/B-Class uses in the SLP.
Grading	C

Name (Address)	**Lansdown Industrial Estate, including Alstone Lane Trading Estate, St George and Bramery Business Park and The Vineyards Industrial Estate**
Reference	C1.9
Description	Mixed industrial area comprising a range of industrial uses in two main estates bisected by the railway line and comprising diverse uses including a brewery, art gallery, trade/motor trade and catering, in older units which have seen some recent refurbishment.
Key Occupier(s)	DEYA Brewing, Cheltenham Auto Repairs, Darcy Galleries
Dominant Uses/Business Sectors	Trade/motor trade, creative industries, catering
Links to Key Economic Clusters	Mixed uses, includes some businesses in Creative Industries.
Percentage Occupied	90
Size, ha	7.80
Building Age	1945-1990, 1990-2010
Building Quality	Average
Area Constraints	• Includes areas of land at risk from surface water flooding • Housing adjacent
Opportunities for Expansion/Regeneration	Within Landsdown Industrial Estate: • The east of the area, 2.76 ha is subject to an undecided planning Outline planning application for up to 215 dwellings with associated access roads, parking and public open space following the demolition of the existing buildings (App. No. 21/02832/OUT). • Outlie consent for mixed use redevelopment of Units 23 and 30 Lansdown Industrial Estate including net 425 sqm of commercial uses (Class E(g), B2 and B8) (linked with above application). These are reviewed in the Employment sites section.
Other Information	-
Recommendation	Active mixed employment area. Part of Landsdown Industrial Estate is proposed for housing. If this is consented, that land will need to be excluded from and employment allocation. The rest of the area should be protected for E(g)/B-Class uses in the SLP.
Grading	C

Name (Address)	**Village Road, Cheltenham**
Reference	C1.10
Description	Area has been redeveloped for housing.
Key Occupier(s)	-
Dominant Uses/Business Sectors	-
Links to Key Economic Clusters	-
Percentage Occupied	-
Size, ha	-
Building Age	-
Building Quality	-
Area Constraints	-
Opportunities for Expansion/Regeneration	-
Other Information	-
Recommendation	-
Grading	E

Name (Address)	**Kohler Mira, Cromwell Road**
Reference	C1.11
Description	Two large older industrial units occupied by Kohler Mira, in a residential area
Key Occupier(s)	Kohler Mira
Dominant Uses/Business Sectors	Manufacturing (domestic showers)
Links to Key Economic Clusters	Supports the domestic construction industry but limited linkages to Key Sectors.
Percentage Occupied	100
Size, ha	2.78
Building Age	Pre-1945 (with modernisation and extensions)
Building Quality	Average
Area Constraints	• Includes areas of land at risk from surface water flooding • Housing adjacent
Opportunities for Expansion/Regeneration	Site fully developed
Other Information	-
Recommendation	Active industrial facility for a major employer. The area should be protected for E(g)/B-Class uses in the SLP.
Grading	B

Name (Address)	**Dunkertons, Dowdeswell Park (formerly The Barlands), London Road**
Reference	C1.12
Description	Large cider distillery, including retail and bar/food options in two modern units located off the A40 south east of Cheltenham.
Key Occupier(s)	Dunkertons, Holland Cooper, Humble Kitchen
Dominant Uses/Business Sectors	Distillery, hot food, leisure, retail
Links to Key Economic Clusters	Some links to Creative Industries, but is primarily a leisure facility
Percentage Occupied	100
Size, ha	2.53
Building Age	Mixed
Building Quality	Good
Area Constraints	• River Chelt to the north • Includes areas of land at risk from surface water flooding • In Area of Outstanding Natural Beauty
Opportunities for Expansion/Regeneration	Undeveloped land in the area is in use for parking.
Other Information	-
Recommendation	Although the site includes some distilling and storage uses, it seems to primarily function as a retail and leisure visitor attraction. It would better be allocated as a leisure facility rather than for E(g)/B-Class uses in the SLP.
Grading	E

Name (Address)	**Blaisdon Way, off Hayden Road**
Reference	C1.13
Description	Three large modern units, including substantial parking and hardstanding areas, located off old Gloucester Road in a mostly residential area.
Key Occupier(s)	GB Liners, Kendon Packaging
Dominant Uses/Business Sectors	Manufacturing – Packaging and liners
Links to Key Economic Clusters	Three large units but accommodating traditional industries.
Percentage Occupied	100
Size, ha	3.13
Building Age	1990-2010
Building Quality	Average
Area Constraints	• Includes areas of land at risk from surface water flooding • Housing adjacent
Opportunities for Expansion/Regeneration	Site fully developed.
Other Information	-
Recommendation	Small but active local employment area. The area should be protected for E(g)/B-Class uses in the SLP. The unit to the north is in use as a gym and for caravan sales, so does not need to be linked to this Employment Area.
Grading	C

Name (Address)	**Prestbury Road and Clevemount Close**
Reference	C1.14
Description	Urban industrial area of older yards and units. The bulk of the site has now been redeveloped for housing, and only one construction yard and a bus depot remain in E(g)/B-Class use, fronting Prestbury Road.
Key Occupier(s)	NGB
Dominant Uses/Business Sectors	Construction/engineering, bus depot
Links to Key Economic Clusters	Two businesses with limited links to key sectors
Percentage Occupied	100
Size, ha	0.40
Building Age	Pre 1945
Building Quality	Average
Area Constraints	• In Flood Zones 2/3 • Includes areas of land at risk from surface water flooding • Housing adjacent
Opportunities for Expansion/Regeneration	Remaining site is in full use
Other Information	-
Recommendation	Two remaining E(g)/B-Class units of modest economic value. They should be protected for E(g)/B-Class uses in the LP but not to the exclusion of other economic opportunities which might be brought forward here.
Grading	D

Name (Address)	**Montis Court (formerly Premier Products), Bouncers Lane**
Reference	C1.15
Description	Two small older units, mostly in trade use. The remainder of the Premier Products site has now been redeveloped for housing.
Key Occupier(s)	The Plasterers One Stop Shop and Plastering Superstore
Dominant Uses/Business Sectors	Trade/building materials
Links to Key Economic Clusters	Small construction industry supplier, modest links to Key Sectors
Percentage Occupied	100
Size, ha	0.50
Building Age	1990-2010
Building Quality	Average
Area Constraints	• Includes areas of land at risk from surface water flooding • Housing adjacent • Trees onsite
Opportunities for Expansion/Regeneration	Remaining site is in full use
Other Information	-
Recommendation	Site accommodates a single trade businesses. The company appears active, but overall it is a low priority for protection in the SLP.
Grading	E

Name (Address)	Hatherley Lane (The Reddings)
Reference	C1.16 (EM1, Site 7)
Description	Large modern unit occupied by a high value electronics manufacturer plus Cheltenham Film Studios, to the rear which accommodates a range of micro businesses, located in a mostly retail/leisure area off an A40 junction.
Key Occupier(s)	Ultra PCS Electronics, Blue Sky Film and Media, Credo Music Academy, Dee and Griffin Solicitors, the Beauty Studio
Dominant Uses/Business Sectors	Advanced manufacturing, film and music, financial services and other mixed services
Links to Key Economic Clusters	Ultra PCS Electronics is an Advanced Manufacturing company, with links to Defence. Cheltenham Film Studios is a key local cluster of Creative Industries, unique in the SLP Area, which includes some Professional and Business Services and Financial Services companies.
Percentage Occupied	100
Size, ha	0.50
Building Age	Mixed
Building Quality	Average
Area Constraints	• Includes areas of land at risk from surface water flooding • Housing adjacent • Trees onsite
Opportunities for Expansion/Regeneration	Site is in full use and bounded by parkland and housing
Other Information	-
Recommendation	Small employment area accommodating a number of high value uses including the unique Film Studios complex. The area should be protected for E(g)/B-Class uses in the SLP.
Grading	B

Appendix 7

Gloucester Employment Site Proformas

Appendix 7 – Gloucester Employment Site Proformas

Name (Address)	Former Quayside House, Blackfriars
Reference	SA07
Description	Site comprises a large modern office building, occupied by a number of mostly public sector occupiers, at an edge of centre location off the A4301 The Quay. Undeveloped land comprises the car park for the existing office.
Size, ha	1.58
Ownership (Developer, occupier, where relevant)	Gloucestershire County Council
Current use	Existing office building and car parking
Market availability	Not available
Planning status	The site was subject to a Reg 3 Major Application consent, by the County Council (App. No. 19/0045/GLR3MJ)
Proposal	The proposed development, now completed, was for one three-storey building of 5,330 sqm to comprise two general medical practitioner surgeries, associated pharmacy, 2,492 sqm of open plan office space and ground floor parking.
Links to Economic Clusters	Property is in use by mostly public sector businesses, with a focus on health services, it is part of the wider cluster of public sector uses in this area.
Site Constraints	N/A – Completed site
Other information	N/A
Site Scoring	N/A – Completed site
Conclusions/Recommendations	The consented property is complete with land to the north in full use as staff car parking for the building. There does not appear to be the prospect of further development here.
Availability, years	-

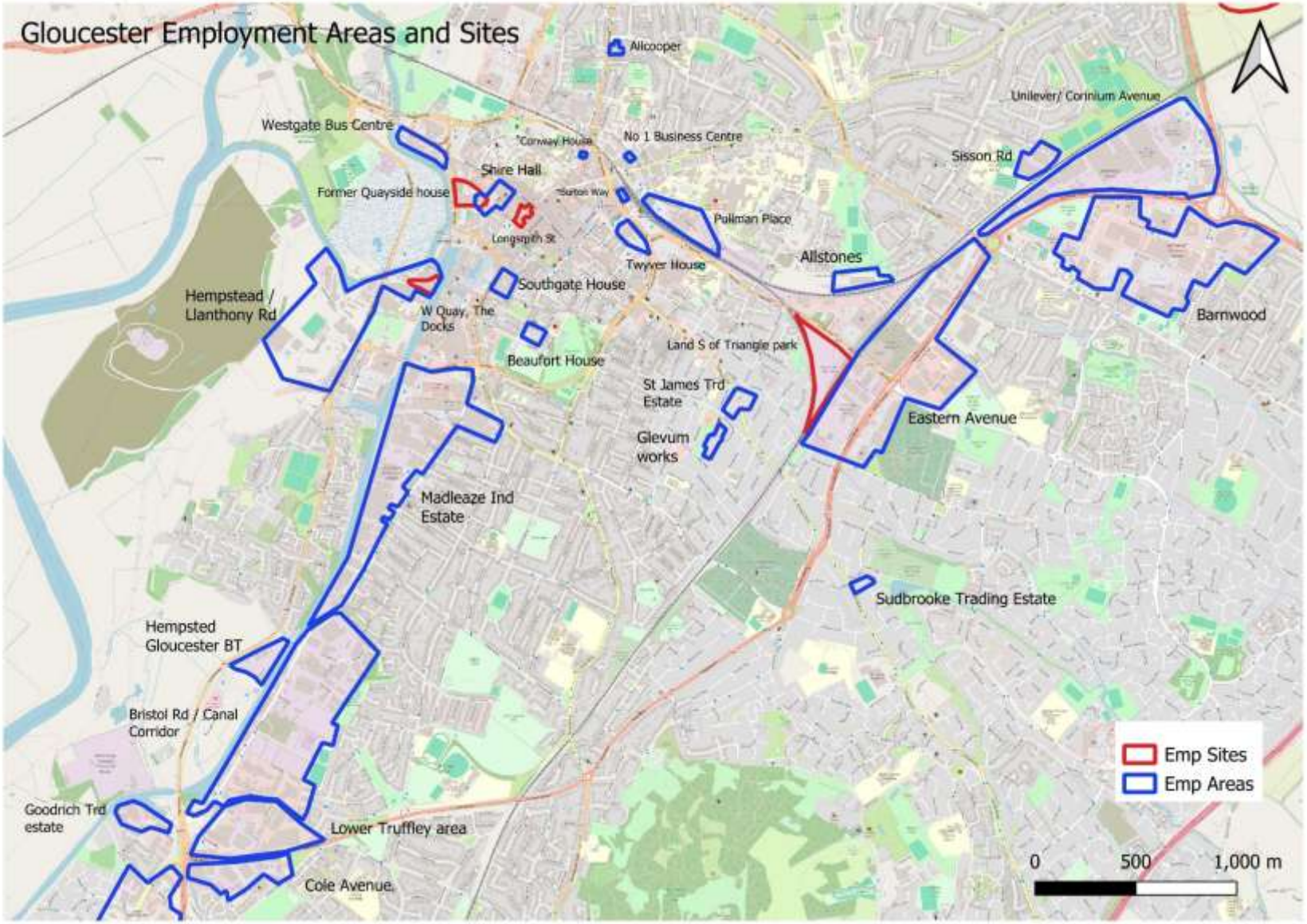
Name (Address)	Former Fleece Hotel and Longsmith Street Car Park
Reference	SA08
Description	A dense urban area comprising a low quality multi-story car park in the south and a mostly vacant historic hotel complex, with associated rear yard and ancillary building areas, in the north, fronting the Westgate Street retail area
Size, ha	0.46
Ownership (Developer, occupier, where relevant)	Gloucester City Council
Current use	The 135 space Longsmith Street Car Park remains in operation; the Hotel is understood to be fully vacant
Market availability	Not available
Planning status	Allocated in an adopted Local Plan for "main town centre uses, including approximately 25 residential units."
Proposal	The site has been subject to multiple regeneration proposals since the Hotel closed in 2002. The most recent was the Phoenix Village Project which would have offered supported accommodation with skills training and assistance to people with health and mental health issues, alongside food, retail and leisure outlets. However, the £60 million project was reliant on Gloucestershire County Council placing young people here. Additionally, the initial £6.3 million of National Government funding for The Fleece was reallocated to other projects in 2023. The proposed scheme was abandoned in September 2025. It is understood that the location will now be subject to multiple smaller scale regeneration projects but no details on these have been made public at the time of writing.
Links to Economic Clusters	The final use of this site is uncertain but stakeholders suggest that leisure or residential uses are most likely, rather than E(g)/B-Class employment, reflecting the surrounding uses.
Site Constraints	• The Main Fleece Hotel is Grade 1 Listed • Urban site, tightly bound by other mostly retail and leisure uses
Other information	-
Site Scoring	N/A – Likely developed for non E(g)/B-Class uses
Conclusions/Recommendations	Regeneration opportunity site. What the land and buildings may be redeveloped for remains uncertain at this time. However, stakeholders suggest that leisure or residential uses are most likely, rather than E(g)/B-Class employment, reflecting the surrounding uses.
Availability, years	-

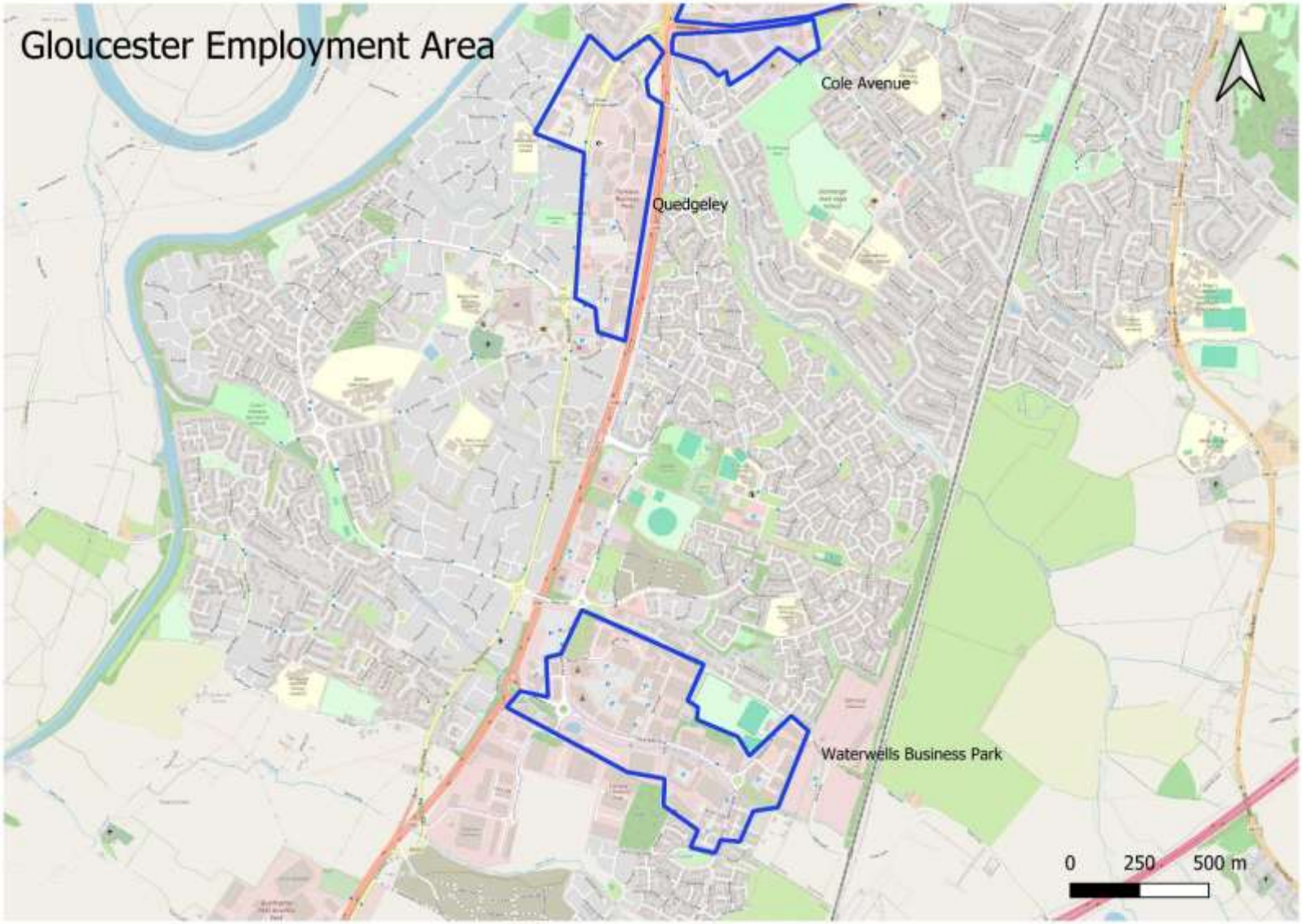
Name (Address)	Land South of Triangle Park (Southern Railway Triangle)
Reference	SA14
Description	Triangular area of mostly vacant brownfield land formed by the junction of two railway lines and the A4302 Metz Way. Active uses on the site include a maintenance depot for Network Rail and a cell phone mast in the east
Size, ha	4.20
Ownership (Developer, occupier, where relevant)	Network Rail (A4302 embankment owned by Gloucestershire County Council)
Current use	Land is mostly vacant apart from the Network Rail depot. There are two other areas of open storage in the south and west of the site, but these appear in limited use at the time of writing.
Market availability	Not available
Planning status	Allocated in an adopted Local Plan for "Class E (g) (office, research and development, or any other industrial process that can be carried out in a residential area without detriment to amenity only) and/or B8 Class (storage and distribution) employment use."
Proposal	Network Rail has indicated that it intends to retain this land for rail infrastructure use only.
Links to Economic Clusters	. -
Site Constraints	• Current access is via a narrow back road which passes between the A38 and to the rear of Triangle Park, underneath the A4302 Metz Way. It is assumed that to develop the site a more direct access will need to be provided off the A4302 Metz Way. This will have to address the level differences between the site and the carriageway • Trees on site • Possible site contamination from previous uses • Parts of the site are at risk from surface water flooding
Other information	-
Site Scoring	-
Conclusions/Recommendations	To be retained by Network Rail for its own use. Thus assumed not available for E(g)/B-Class development.
Availability, years	-

Name (Address)	**Part of West Quay, the Docks**
Reference	SA18
Description	Small area of older warehouse units and yard space within the wider docklands area and surrounding the historic Alexandria Warehouse (which is excluded from the Site).
Size, ha	0.70
Ownership (Developer, occupier, where relevant)	Canal and River Trust (Alexandra Warehouse is owned by The Corporation of Gloucestershire College)
Current use	Site includes four brick warehouses. The southern two properties at least appear to be occupied by the Gloucestershire Brewery (Warehouse 4) and Furniture Recycling Project.
Market availability	Not available
Planning status	Allocated in an adopted Local Plan for "Main town centre uses, including approximately 20 dwellings."
Proposal	The bulk of the site, west of Alexandria Warehouse, and excluding the Gloucestershire Brewery Building, is subject to an undecided planning application for 41 no. residential properties incorporating new commercial unit (E use class) of 160 sqm through the conversion of the existing warehouse building and construction of new apartment blocks (6 storeys) following the demolition of existing structures (App. No. 25/01157/FUL). The proposal would take up 0.39 ha of the 0.70 ha site.
Links to Economic Clusters	Site adjoins Gloucestershire College and there are a number of mostly traditional industrial uses to the west and north. However, the emphasis on development here appears to be residential rather than commercial.
Site Constraints	• The site falls into Flood Zone 2 • Parts of the site are at risk from surface water flooding • Located within The Docks Conservation Area • The Brewery Building (Fox's Malthouse) and the Alexandria Warehouse are Grade II Listed
Other information	-
Site Scoring	N/A – assumed to be a mostly residential site
Conclusions/Recommendations	The bulk of the site is now proposed for housing, and while this current application may be refused, the emphasis of development is strongly residential, albeit with a single small commercial unit included. Of the outstanding 0.31 ha, not included in the application, the bulk of this is taken up by Gloucestershire Brewery which appears to be an active and successful brewery and leisure venue. Thus it is assumed that any E(g)/B-Class development which takes place here will be limited.
Availability, years	-

Appendix 8

Gloucester Employment Areas and Sites Map


Gloucester Employment Areas and Sites
Allcooper
Unilever/ Corinium Avenue
Westgate Bus Centre
Conway House
No 1 Business Centre
Sisson Rd
Shire Hall
Former Quayside house
Station Way
Pullman Place
Longsmith St
Allstones
Twyver House
Southgate House
Hempstead / Llanthony Rd
W Quay, The Docks
Barnwood
Land S of Triangle park
Beaufort House
St James Trd Estate
Eastern Avenue
Glevum works
Madleaze Ind Estate
Sudbrooke Trading Estate
Hempsted Gloucester BT
Bristol Rd / Canal Corridor
Goodrich Trd estate
Lower Truffley area
Cole Avenue
Emp Sites
Emp Areas
0
500
1,000 m


Gloucester Employment Area
Cole Avenue
Quedgeley
Waterwells Business Park
0
250
500 m

Appendix 9

Gloucester Employment Area Proformas

Appendix 9 – Gloucester Employment Area Proformas

Name (2019 ELR Sub Areas Included)	**Madleaze Industrial Estate** (Madleaze Industrial Estate; Moreland Trading Estate, Mill Place North and South, Permali Park)
Reference (2019 ELR Sub Area Reference Numbers Included)	G1.1 (020, 043-046)
Description	Large, linear Employment Area running primarily along the western side of Bristol Road and comprising a range of older industrial premises, many sub-divided to accommodate local firms.
Key Occupier(s)	JGB Engineering, Diamorph, Lillieshall Steel Services, Nicks Timber
Dominant Uses/Business Sectors	Mixed manufacturing, steel fabrication, engineering, trade, construction
Links to Key Economic Clusters	Mostly comprises local firms in trade and engineering use but does include facilities for Diamorph which engages in Advanced Manufacturing of materials for sectors like energy, aerospace and defence.
Percentage Occupied	93
Size, ha	29.93
Building Age	Mixed
Building Quality	Average
Area Constraints	• The north and west of the Area is in Flood Zones 2/3 • Includes areas of land subject to surface water flooding • Housing along the Bristol Road frontage
Opportunities for Expansion/Regeneration	Densely developed area, all land and property appears well used.
Other Information	-
Recommendation	Large, active urban Employment Area. It should be protected for E(g)/B-Class uses in the SLP.
Grading	C

Name (2019 ELR Sub Areas Included)	**Bristol Road / Canal Corridor** (Land between Bristol Road and the Canal: 277 – 279 Bristol Road, Tuffley Trading Estate, Empire Way Trading Estate, Ashville Road Trading Estate; St Albans Trading Estate, former Gas Works Site)
Reference (2019 ELR Sub Area Reference Numbers Included)	G1.2 (001, 004, 007, 024, 025, 026, 056)
Description	Large urban industrial area, providing a diverse range of older, average quality industrial and warehouse stock, along the Bristol Road Corridor extending south to the A430 Junction.
Key Occupier(s)	SYNETIQ Gloucester, Gloucester Volvo Specialists, AMS Auctions - Gloucester Auction Centre, Enterprise Flex-E-Rent, Wales and West Utilities, Gloucester Powder Coating
Dominant Uses/Business Sectors	Trade/Motor Trade and repair, utilities, engineering and light fabrication
Links to Key Economic Clusters	Limited links to Key Sectors
Percentage Occupied	86
Size, ha	39.56
Building Age	Mixed
Building Quality	Average
Area Constraints	• A small area in the South West is in Flood Zones 2/3 • Includes areas of land subject to surface water flooding • Housing adjacent
Opportunities for Expansion/Regeneration	There is a large area of land (5.44 ha) fronting, and to the South/South West of the Wales and West Utilities site (north of Ford Bristol Street Motors) which appears vacant or is only used for open storage and vehicle parking. This area provides a redevelopment opportunity although is in multiple ownership and appears to include the remains of gas storage infrastructure, so will likely include contaminated land.
Other Information	-
Recommendation	Large, diverse industrial area. While dominated by trade uses it still contains a range of average and budget quality industrial and storage uses which are meeting local business needs. The Area has also seen some recent developments of new industrial units around Lower Tuffley Lane. It should be protected for E(g)/B-Class uses in the SLP.
Grading	C

Name (2019 ELR Sub Areas Included)	**Hempstead / Llanthony Road** (Llanthony Business Park and Industrial Estate; Spinnaker Road Trading Estate; 125 Business Park; City Business Centre, Severside Trading Estate, Meadow Park)
Reference (2019 ELR Sub Area Reference Numbers Included)	G1.3 (027-030; 033; 035; 041)
Description	Mixed Employment Area comprising an area of low density, large industrial/warehouse properties north west of Hempstead/Llanthony Road and group of smaller industrial and storage units to the south east, extending into Gloucester Dock and including some historic dock properties.
Key Occupier(s)	Gloucestershire College, C and S Security, Motus Commercials Gloucester, Ford Fuels
Dominant Uses/Business Sectors	Motor Trade/Motor Repair, mixed leisure, security, boat maintenance
Links to Key Economic Clusters	Limited links to Key Sectors
Percentage Occupied	85
Size, ha	25.78
Building Age	Mixed
Building Quality	Average
Area Constraints	• Area is in Flood Zones 2/3 • Includes areas of land subject to surface water flooding • Some housing included in the Area • Partially in a Conservation Area • Includes some Listed Buildings
Opportunities for Expansion/Regeneration	There are large areas of underused land in the north western area, including 2.58 ha north of the Gloucester City Football Ground (owned by Arriva) and 4.86 ha at the western end of Spinnaker Road (Multiple Ownerships). These could allow some brownfield expansion of the area.
Other Information	-
Recommendation	Active, mixed local Employment Area. It should be protected for E(g)/B-Class uses in the SLP.
Grading	C

Name (2019 ELR Sub Areas Included)	**Eastern Avenue** (Eastern Avenue Trading Estate, Eastbrook Trading Estate, Triangle Park, Chase Lane Employment Area, Chancel Close Trading Estate, Access Park, Southbrook/Northbrook Road Trading Estate)
Reference (2019 ELR Sub Area Reference Numbers Included)	G1.4 (013; 015-016; 018-019; 038-039; 042)
Description	A range of industrial estates, offering mostly small and mid-sized units of average quality, plus a larger Royal Mail facility, located along A38 Eastern Avenue, with a focus on trade occupiers.
Key Occupier(s)	Royal Mail, Screwfix, Darchem Engineering
Dominant Uses/Business Sectors	Logistics, Trade, mixed engineering and light fabrication
Links to Key Economic Clusters	Limited links to Key Sectors
Percentage Occupied	92
Size, ha	41.37
Building Age	Mixed
Building Quality	Average
Area Constraints	• Land in the North is in Flood Zones 2/3 • Includes areas of land subject to surface water flooding
Opportunities for Expansion/Regeneration	The vacant 4.72 ha site at the junction of Metz Way and Eastern Avenue is under development for a Costco.
Other Information	-
Recommendation	A group of active local industrial estates, accommodating a range of local businesses, albeit dominated by trade uses. It should be protected for E(g)/B-Class uses in the SLP.
Grading	C

Name (2019 ELR Sub Areas Included)	**Barnwood** (Barnwood Employment Area and Barnwood Point (Part of)
Reference (2019 ELR Sub Area Reference Numbers Included)	G1.5 (009A-G; 008)
Description	Mixed business park accommodating a range of larger, regional/national businesses in offices, data centres and warehouses, with smaller properties in the west. It is located in a prominent position off the A417 route into Gloucester.
Key Occupier(s)	CCS, TSB, Barclays (Data Centre), Indectron Colocation Data Centre, Booker Wholesale
Dominant Uses/Business Sectors	Logistics, wholesale, financial/legal, healthcare
Links to Key Economic Clusters	Includes a cooperate office for TSB and a data centre for Barclays, some of the largest such facilities in the city, plus several smaller Financial Services Businesses. There are two data centres in the area, key facilities for the Digital and Technologies Sector.
Percentage Occupied	92
Size, ha	35.02
Building Age	1945-1990
Building Quality	Average
Area Constraints	• Includes areas of land subject to surface water flooding • Housing adjacent.
Opportunities for Expansion/Regeneration	The 10.31 ha EDF Energy site in the south has been vacant since 2022. It is now subject to an undecided Outline planning application for up to 281 new homes and up to 8,000 sqm of mixed new employment floorspace (App. No. 26/00316/OUT).
Other Information	-
Recommendation	Active mixed Employment Area accommodating a number of national occupiers and two large data centres, with at least some prospect for new development, albeit part of a mixed-use redevelopment of a larger site. It should be protected for E(g)/B-Class uses in the SLP. If the mixed use scheme on the EDF site is approved, housing elements will need to be excluded from the Area boundary.
Grading	A

Name (2019 ELR Sub Areas Included)	**Unilever/Corinium Avenue** (Barnwood Point (part of))
Reference (2019 ELR Sub Area Reference Numbers Included)	G1.6 (008)
Description	Multiple large modern factory complexes and logistics units, plus smaller trade properties, on a linear Employment Area located north of Corinium Avenue and west of the A417 on the edge of the Gloucester settlement area. Also includes a multi-let office building, Corinium House.
Key Occupier(s)	Unilever, Lineage, Amazon, Kohler Mira
Dominant Uses/Business Sectors	Logistics , food production, trade, manufacturing of household goods, professional services, financial and legal services.
Links to Key Economic Clusters	Corinium House includes a mix of Professional and Business Services and Financial Services.
Percentage Occupied	98
Size, ha	28.65
Building Age	1945-1990
Building Quality	Good
Area Constraints	• Includes areas of land subject to surface water flooding
Opportunities for Expansion/Regeneration	Last remaining undeveloped plot, in the north east has now been developed, primarily for an Amazon depot. Further growth is prevented by the adjacent railway line and surrounding strategic roads.
Other Information	-
Recommendation	Includes a group of strategic scale industrial and warehouse units, accommodating several regional/national scale businesses. It should be protected for E(g)/B-Class uses in the SLP.
Grading	A

Name (2019 ELR Sub Areas Included)	**Southgate House** (Single area, as above)
Reference (2019 ELR Sub Area Reference Numbers Included)	G1.7 (055)
Description	Large brick built, good quality, four storey multi-occupancy office building, well located off Southgate Street and linking to Gloucester Docks. The space has been recently refurbished to provide offices of 100-4,000 sqm. Also includes one floor of smaller serviced offices – Fig Gloucester.
Key Occupier(s)	Pro Insurance Solutions, Thistle Insurance Services, NextGen Utilities AA Certification, Gazella, Multilink Care Management
Dominant Uses/Business Sectors	Professional services, insurance, and utilities companies
Links to Key Economic Clusters	Accommodates a range of office based businesses including a cluster of smaller Financial Services firms.
Percentage Occupied	Approx 50
Size, ha	1.07
Building Age	1990-2010
Building Quality	Good
Area Constraints	• In a Conservation Area • Trees onsite • Housing adjacent.
Opportunities for Expansion/Regeneration	Site is fully developed and the building has been recently refurbished.
Other Information	-
Recommendation	A useful source of smaller, modern offices in central Gloucester. It should be protected for E(g)/B-Class uses in the SLP.
Grading	B

Name (2019 ELR Sub Areas Included)	**Beaufort House** (Single area, as above)
Reference (2019 ELR Sub Area Reference Numbers Included)	G1.8 (050)
Description	Large vacant older four storey office building, which links to a row of listed terraced buildings which are also in office use on Spa Road and a modern office, Montpellier House, on Montpellier Road. It is in an edge of centre location close to Gloucester Park.
Key Occupier(s)	Gloucester Charities Trust, Montrose Conveyancing
Dominant Uses/Business Sectors	Charity, Financial Services
Links to Key Economic Clusters	Main building is now empty, but some peripheral properties accommodate Financial Services firms.
Percentage Occupied	20
Size, ha	0.82
Building Age	Pre-1945
Building Quality	Average
Area Constraints	• Site is in Flood Zones 2/3 • Includes Listed Buildings • In a Conservation Area.
Opportunities for Expansion/Regeneration	Beaufort House now has Prior Approval for the change of use from offices to 66 self-contained flats (App. No. 26/00237/PRIOR).
Other Information	-
Recommendation	The main building now has Prior Approval for a change of use to flats. While some small peripheral offices remain this is no longer a defined Employment Area and does not need to be directly identified and protected as such in the SLP.
Grading	E

Name (2019 ELR Sub Areas Included)	**Twyver House** (Single area, as above)
Reference (2019 ELR Sub Area Reference Numbers Included)	G1.9 (054)
Description	Large older, five storey office building , occupied by HM Land Registry and benefitting from some recent refurbishment. On the A430 Burton Way across from Gloucester Rail Station.
Key Occupier(s)	HM Land Registry
Dominant Uses/Business Sectors	Public Administration
Links to Key Economic Clusters	Limited links to Key Sectors
Percentage Occupied	100
Size, ha	1.30
Building Age	1945-1990
Building Quality	Average
Area Constraints	• Trees onsite
Opportunities for Expansion/Regeneration	Building has a large car park, but this appears well used.
Other Information	-
Recommendation	Large, centrally located public sector office. It should be protected for E(g)/B-Class uses in the SLP.
Grading	B

Name (2019 ELR Sub Areas Included)	**Shire Hall** (Single area, as above)
Reference (2019 ELR Sub Area Reference Numbers Included)	G1.10 (053)
Description	Shire Hall is a large three wing 5/6 storey municipal office building located in the heart of the City Centre, which has seen recent refurbishment. It includes offices for the City Council, County Council and Police.
Key Occupier(s)	Gloucester City Council, Gloucestershire County Council, Gloucestershire Constabulary
Dominant Uses/Business Sectors	Public Administration
Links to Key Economic Clusters	Limited links to Key Sectors
Percentage Occupied	100
Size, ha	1.78
Building Age	Mixed
Building Quality	Good
Area Constraints	• Listed Buildings on site and adjacent • In Conservation Area • Some land in south west is in Flood Zones 2/3 • Includes areas of land subject to surface water flooding • Trees onsite
Opportunities for Expansion/Regeneration	Fully developed and in a dense urban area
Other Information	-
Recommendation	Key public sector administrative facilities. It should be protected for E(g)/B-Class uses in the SLP.
Grading	B

Name (2019 ELR Sub Areas Included**)**	**Pullman Place/Pullman Court** (As above, plus Warehouse, Great Western Road)
Reference (2019 ELR Sub Area Reference Numbers Included)	G1.11 (005, 022, 023)
Description	Mixed urban employment area, including Pullman Place a large modern, four storey office in healthcare uses; Pullman Court a terraced square of multi-storey offices and a large warehouse to the rear.
Key Occupier(s)	NHS, Redkite Solicitors, Bspoke Lifestyle, Palm Flow Pilates Studio
Dominant Uses/Business Sectors	Healthcare, Financial and Legal Services
Links to Key Economic Clusters	Pullman Court includes a cluster of smaller Financial Services businesses
Percentage Occupied	100
Size, ha	4.74
Building Age	1945-1990, 1990-2010
Building Quality	Average
Area Constraints	• Includes areas of land subject to surface water flooding • Trees onsite
Opportunities for Expansion/Regeneration	Area is fully developed. Adjacent undeveloped land is in use for rail infrastructure.
Other Information	-
Recommendation	Small group of modern offices, accommodating an active cluster of Financial Services businesses, in a central location in Gloucester. It should be protected for E(g)/B-Class uses in the SLP.
Grading	C

Name (2019 ELR Sub Areas Included**)**	**No 1 Business Centre** (Single area, as above)
Reference (2019 ELR Sub Area Reference Numbers Included)	G1.12 (012)
Description	Brick built converted factory now accommodating a business centre providing serviced office rentals, virtual office services, registered business addresses, and meeting room facilities in an edge of centre location off the B4063 London Road.
Key Occupier(s)	The Good Surveyor, Laurine.co.uk, SPE Consultants, Go Gloucestershire Communications, Orbexia, AK Logistic Services, Trakasolutions
Dominant Uses/Business Sectors	Mixed professional services, photography, financial and legal services, digital and telecommunications.
Links to Key Economic Clusters	Accommodates a diverse group of micro businesses, with a focus on Professional and Business Services.
Percentage Occupied	Not known
Size, ha	0.15
Building Age	1990-2010
Building Quality	Average
Area Constraints	• In a Conservation Area • Housing adjacent
Opportunities for Expansion/Regeneration	Site is in full use and tightly bound by other uses.
Other Information	-
Recommendation	Key source of serviced start-up and micro business accommodation in Gloucester. It should be protected for E(g)/B-Class uses in the SLP.
Grading	C

Name (2019 ELR Sub Areas Included**)**	**Conway House** (Single area, as above)
Reference (2019 ELR Sub Area Reference Numbers Included)	G1.13 (057)
Description	Four storey average quality brick built office building on a retail street in central Gloucester. It is now a multi-let serviced business centre, managed by Regus and has been refurbished internally.
Key Occupier(s)	Regus (Other occupiers not known)
Dominant Uses/Business Sectors	Mixed professional services
Links to Key Economic Clusters	-
Percentage Occupied	Not known
Size, ha	0.09
Building Age	1990-2010
Building Quality	Average
Area Constraints	• In a Conservation Area • Partly in Flood Zone 2 • Housing adjacent
Opportunities for Expansion/Regeneration	The building has Prior Approval for conversion to 17, 1-3 bed flats (App. No. 23/00858/JPA).
Other Information	-
Recommendation	Building appears to be in active use as a business centre, at present, but does have Prior Approval to be converted for housing making its future operation uncertain. It should not therefore be protected for E(g)/B-class uses in the SLP.
Grading	E

Name (2019 ELR Sub Areas Included)	**Railway House, Bruton Way** (Single area, as above)
Reference (2019 ELR Sub Area Reference Numbers Included)	G1.14 (052)
Description	Modern, two storey multi-let office building, prominently located off the A430 Bruton Way close to Gloucester Rail Station. Converted from a retail warehouse.
Key Occupier(s)	Kip McGrath Education Centre, Gloucester City Homes, Gloucestershire Community Rail Partnership, Inclusion Gloucestershire
Dominant Uses/Business Sectors	Education, housing, community and voluntary sector
Links to Key Economic Clusters	Limited links to Key Sectors
Percentage Occupied	100
Size, ha	0.20
Building Age	1990-2010
Building Quality	Good
Area Constraints	-
Opportunities for Expansion/Regeneration	Fully developed and tightly bound by other uses.
Other Information	-
Recommendation	Modern office building, in active use. It should be protected for E(g)/B-Class uses in the SLP.
Grading	C

Name (2019 ELR Sub Areas Included)	**Waterwells Business Park** (Single area, as above)
Reference (2019 ELR Sub Area Reference Numbers Included)	G1.15 (011A – F)
Description	Modern, good quality business park including a number of modern offices in the south and west, including large HQ facilities for Gloucestershire Police, and mid-sized industrial units in the north and east, prominently located off the main A38 route into Gloucester.
Key Occupier(s)	OPCC/Gloucestershire Constabulary, Stewart Golf, Probo Medical, Alston, Direct Online Services, Acorn Thorn, Eclipse Furniture, Higgs and Higgs, Secure Systems and Technologies, SN Engineering, Prima Dental, Rochling, FLI Structures, Decibel Fire and Security.
Dominant Uses/Business Sectors	Public Administration, hospitality, medical manufacturing, technology and security services, construction.
Links to Key Economic Clusters	Includes a range of high value uses, in modern accommodation which link to Key Sectors including Advanced Manufacturing (medical and security systems). In the offices, other than the Police, the focus is on Professional and Business Services.
Percentage Occupied	89
Size, ha	38.80
Building Age	Mixed
Building Quality	Good
Area Constraints	• Housing adjacent • Includes area of land subject to surface water flooding • Trees onsite.
Opportunities for Expansion/Regeneration	Includes 1.12 ha of undeveloped land in the north, at the junction of Telford Way and Edison Close. This land is owned by the Police and Crime Commissioner for Gloucestershire, however, and is assumed to be held for the future expansion of the Police HQ.
Other Information	-
Recommendation	Modern, good quality mixed employment area including some high value occupiers. It should be protected for E(g)/B-Class uses in the SLP.
Grading	B

Name (2019 ELR Sub Areas Included)	**Quedgeley** (A variety of sites including Olympus Business Park, Space Business Centre, Green Farm Business Park)
Reference (2019 ELR Sub Area Reference Numbers Included)	G1.16 (Variety of sites including 010, 014, 021, 031)
Description	Mid-sized modern industrial estate, running west of the A38, in the south west of the city, accommodating a range of larger B2/B8 occupiers east of Olympus Park Road and smaller occupiers to the west.
Key Occupier(s)	Royal Mail, Yodel, Geotechnical Engineering, ARRK, Severn, Gloucestershire's Machining Centre, Tech Sofa
Dominant Uses/Business Sectors	Logistics, Engineering, Mixed Manufacturing, Food Production, Trade
Links to Key Economic Clusters	Mixed area overall but includes a group of larger industrial units which accommodate Advanced Manufacturing businesses, alongside logistics operators. Also includes several multi-occupancy offices which support Professional and Business Services.
Percentage Occupied	91
Size, ha	27.01
Building Age	1990-2010, 2010+
Building Quality	Good
Area Constraints	• Housing adjacent • Includes area of land subject to surface water flooding • Trees onsite.
Opportunities for Expansion/Regeneration	Area is fully developed and bound by other uses.
Other Information	-
Recommendation	Mixed area but including some larger B2/B8 units, accommodating regional/national scale businesses and high value occupiers. It should be protected for E(g)/B-Class uses in the SLP.
Grading	B

Name (2019 ELR Sub Areas Included)	**Lower Tufley** (South of Lower Tufley Lane)
Reference (2019 ELR Sub Area Reference Numbers Included)	G1.17 (017 A-H)
Description	Older industrial area characterised by mid-sized units, with some modern infill development along Lower Tuffley Lane. Located to the east of Bristol Road and surrounded by similar industrial uses to the north and west, it is dominated by trade ad logistics uses. Residential development located further to the east.
Key Occupier(s)	XPO Logistics, The Bathroom Showroom, Baylis, Warkins and Powis
Dominant Uses/Business Sectors	Motor Trade/Trade, Logistics
Links to Key Economic Clusters	Limited links to Key Sectors
Percentage Occupied	90
Size, ha	12.82
Building Age	1945-1990 (mostly)
Building Quality	Average
Area Constraints	• Housing adjacent • Includes area of land subject to surface water flooding • Trees onsite.
Opportunities for Expansion/Regeneration	Area, including land along Lower Tuffley Lane is fully developed.
Other Information	-
Recommendation	Active local employment area, although dominated by trade uses it still provides a useful source of mid-sized properties at the A3/A430 Junction. It should be protected for E(g)/B-Class uses in the SLP.
Grading	C

Name (2019 ELR Sub Areas Included)	**Cole Avenue (South of A38, East of A3)** (Shepherd Road Inc. Central Trading Estate)
Reference (2019 ELR Sub Area Reference Numbers Included)	G1.18 (032)
Description	Group of average quality, mid-sized industrial and warehouse units, dominated by trade uses and located at a main road junction on the edge of the Lower Tuffley neighbourhood.
Key Occupier(s)	Baylis Chevrolet Service, Johnsons Mazda Gloucester, MBC Timber, Euro Car Parts
Dominant Uses/Business Sectors	Trade, Motor Trade/Repair, manufacture of wooden buildings.
Links to Key Economic Clusters	Limited links to Key Sectors.
Percentage Occupied	100
Size, ha	6.34
Building Age	1945-1990
Building Quality	Average
Area Constraints	• East of the Area is in Flood Zones 2/3 • Housing adjacent • Includes area of land subject to surface water flooding • Trees onsite.
Opportunities for Expansion/Regeneration	Area is fully developed and tightly bound by other uses.
Other Information	-
Recommendation	Active local employment area, dominated by trade uses but including some manufacturing businesses. It should be protected for E(g)/B-Class uses in the SLP.
Grading	C

Name (2019 ELR Sub Areas Included)	**St James Trading Estate** (including Frances Woodcock Trading Estate)
Reference (2019 ELR Sub Area Reference Numbers Included)	G1.19 (036, 037)
Description	Two average quality local industrial estates, located east and west of the B4073 Barton Street, in a mostly residential area and offering mostly smaller units.
Key Occupier(s)	SOH Fit, Beauty Within, Dragon Martial Arts, Gloucester Taxi, Pampered Paws, Redd Tech Repair, Universal Care Agency, John's Privat Hire Cars and Taxis, The Gloucester Biltong Company
Dominant Uses/Business Sectors	Health and fitness, trade/wholesale, mixed services.
Links to Key Economic Clusters	Limited links to Key sectors
Percentage Occupied	92
Size, ha	1.37
Building Age	1945-1990
Building Quality	Average
Area Constraints	• Includes areas of land at risk from surface water flooding • Housing adjacent.
Opportunities for Expansion/Regeneration	The Area is fully developed and tightly bound by other uses.
Other Information	-
Recommendation	Two small industrial estates, dominated by trade uses but providing a key local source of smaller units which could meet a range of local needs. It should be protected for E(g)/B-Class uses in the SLP.
Grading	C

Name (2019 ELR Sub Areas Included)	**Goodrich Trading Estate** (Single area, as above)
Reference (2019 ELR Sub Area Reference Numbers Included)	G1.20 (031)
Description	Mixed group of light industrial, storage and single storey office units, of average quality in an edge of settlement location off the A430.
Key Occupier(s)	Hydrolich Hose and Fluid, Roofbase Gloucester, Hanman, Speedy Services, Brunsdon, Mercury Glazing Supplies.
Dominant Uses/Business Sectors	Trade, Construction
Links to Key Economic Clusters	Limited links to Key sectors
Percentage Occupied	100
Size, ha	2.64
Building Age	1945-1990
Building Quality	Average
Area Constraints	• North East of the site is in Flood Zones 2/3 • Includes areas of land at risk from surface water flooding • Housing adjacent.
Opportunities for Expansion/Regeneration	Site is fully developed and tightly bound by other uses.
Other Information	-
Recommendation	Local, average quality industrial estate but appears well used and has good access. It should be protected for E(g)/B-Class uses in the SLP. There are two offices south of KFC which could also be included in the area boundary.
Grading	C

Name (2019 ELR Sub Areas Included)	**Allstones, Myers Road** (Single area, as above)
Reference (2019 ELR Sub Area Reference Numbers Included)	G1.21 (003)
Description	Large industrial unit surrounded by large areas of open storage for aggregates and waste.
Key Occupier(s)	Allstone
Dominant Uses/Business Sectors	Aggregates, Waste (Skip hire)
Links to Key Economic Clusters	Limited links to Key Sectors
Percentage Occupied	100
Size, ha	2.20
Building Age	1945-1990
Building Quality	Poor
Area Constraints	• Includes areas of land at risk from surface water flooding • Housing adjacent
Opportunities for Expansion/Regeneration	There is an aspiration for housing here. An EIA Screening Opinion Request for residential redevelopment of site for up to 200 dwellings and up to 200 units of key worker/student accommodation plus associated open space and access, was registered in 2023 (App. No. 23/00727/EIA).
Other Information	-
Recommendation	Site represents a long term regeneration opportunity but at present is in use accommodating bad neighbour uses which could struggle to find accommodation elsewhere. It should be protected for E(g)/B-Class uses in the SLP, but not to the exclusion of redevelopment opportunities which might deliver superior economic value.
Grading	D

Name (2019 ELR Sub Areas Included)	**Glevum Works** (Single area, as above)
Reference (2019 ELR Sub Area Reference Numbers Included)	G1.22 (006)
Description	Small, average quality industrial estate, to the rear of housing and accessed via narrow residential roads.
Key Occupier(s)	Discount Tyres, Express Removals and storage, Herbert Davis Removals
Dominant Uses/Business Sectors	Logistics, Motor Repair, Construction
Links to Key Economic Clusters	Limited links to Key Sectors
Percentage Occupied	100
Size, ha	0.89
Building Age	Mixed
Building Quality	Average
Area Constraints	• Includes areas of land at risk from surface water flooding • Housing adjacent • Constrained access.
Opportunities for Expansion/Regeneration	Area is in full use and tightly bound by other uses.
Other Information	-
Recommendation	Small, constrained but active local industrial estate. It should be protected for E(g)/B-Class uses in the SLP.
Grading	D

Name (2019 ELR Sub Areas Included)	**Sudbrooke Trading Estate** (Single area, as above)
Reference (2019 ELR Sub Area Reference Numbers Included)	G1.23 (047)
Description	Small infill site, to the rear of housing, and in use as a yard for a building supply company plus some prefabricated structures.
Key Occupier(s)	Morgan Supplies
Dominant Uses/Business Sectors	Trade
Links to Key Economic Clusters	Limited links to Key Sectors
Percentage Occupied	100
Size, ha	0.55
Building Age	1945-1990
Building Quality	Poor
Area Constraints	• In Flood Zones 2/3 • Includes areas of land at risk from surface water flooding • Housing adjacent
Opportunities for Expansion/Regeneration	In the long term the whole of this low density site may represent a redevelopment opportunity. In the short term the yard appears in full use.
Other Information	-
Recommendation	Site represents a long term regeneration opportunity but at present is in use. It should be protected for E(g)/B-Class uses in the SLP, but not to the exclusion of redevelopment opportunities which might deliver superior economic value.
Grading	D

Name (2019 ELR Sub Areas Included)	**Sisson Road** (Single area, as above)
Reference (2019 ELR Sub Area Reference Numbers Included)	G1.24 (049)
Description	Several brick built older factory buildings, and more recent extensions at the edge of a residential area.
Key Occupier(s)	Helipebs Controls, GR Lane Health Products
Dominant Uses/Business Sectors	Hydraulic Equipment supply, pharmaceuticals production
Links to Key Economic Clusters	Includes one business in the Life Sciences sector
Percentage Occupied	100
Size, ha	2.41
Building Age	1945-1990
Building Quality	Average
Area Constraints	• Includes areas of land at risk from surface water flooding • Housing adjacent.
Opportunities for Expansion/Regeneration	Site is in full use. Surrounding undeveloped land is in use as playing fields.
Other Information	-
Recommendation	Small but active employment area accommodating two larger employers. It should be protected for E(g)/B-Class uses in the SLP.
Grading	C

Name (2019 ELR Sub Areas Included)	**Hempstead Gloucester BT** (Single area, as above)
Reference (2019 ELR Sub Area Reference Numbers Included)	G1.25 (058)
Description	A low-density employment site comprising open hardstanding and open storage yards along with two warehouse buildings, prominently located off the A430 and adjacent to the Gloucester and Sharpness Canal.
Key Occupier(s)	BT Fleet Workshops, Neil Ogden Commercials
Dominant Uses/Business Sectors	Motor Repair
Links to Key Economic Clusters	Indirectly supports the Digital and Technology sector through fleet management for BT.
Percentage Occupied	100
Size, ha	2.74
Building Age	1945-1990
Building Quality	Average
Area Constraints	• In Flood Zones 2/3 • Includes areas of land at risk from surface water flooding • Housing adjacent.
Opportunities for Expansion/Regeneration	In the long term the whole of this low density site may represent a redevelopment opportunity, capitalising on its attractive canal side location and good strategic road access. In the short term the depot appears in full use.
Other Information	-
Recommendation	Site represents a long term regeneration opportunity but at present appears well used. It should be protected for E(g)/B-Class uses in the SLP, but not to the exclusion of redevelopment opportunities which might deliver superior economic value.
Grading	D

Name (2019 ELR Sub Areas Included)	**Westgate Business Park** (Single area, as above)
Reference (2019 ELR Sub Area Reference Numbers Included)	G1.26 (040)
Description	Small group of average quality industrial and warehouse units, prominently position on the A417 route into the city.
Key Occupier(s)	Steer, Ineos, Malvern Tyres
Dominant Uses/Business Sectors	Trade/Motor Trade and repair
Links to Key Economic Clusters	Limited links to Key Sectors
Percentage Occupied	100
Size, ha	1.91
Building Age	1945-1990
Building Quality	Average
Area Constraints	• In Flood Zones 2/3 • Includes areas of land at risk from surface water flooding.
Opportunities for Expansion/Regeneration	All land in use and bound by main roads and the River Severn.
Other Information	-
Recommendation	Small area, dominated by trade uses and of modest overall value, but still in use accommodating a range of local firms. It should be protected for E(g)/B-Class uses in the SLP, but not to the exclusion of redevelopment opportunities which might deliver superior economic value.
Grading	D

Name (2019 ELR Sub Areas Included)	**Allcooper (76 Kingsholm Road)** (Single area, as above)
Reference (2019 ELR Sub Area Reference Numbers Included)	G1.27 (051)
Description	Single storey good quality, multi-let office building on a main road position off the A430 Kingsholm Road in a mostly residential area.
Key Occupier(s)	Securitas, TMS, Cordial, Community Foster Care
Dominant Uses/Business Sectors	Private security, media, social welfare/community care
Links to Key Economic Clusters	Includes one business in Creative Industries.
Percentage Occupied	100
Size, ha	0.36
Building Age	1945-1990
Building Quality	Good
Area Constraints	• Housing adjacent
Opportunities for Expansion/Regeneration	Building was refurbished to office uses in 2023 and remains in full use.
Other Information	-
Recommendation	Active, multi-let office building. It should be protected for E(g)/B-Class uses in the SLP.
Grading	C

Appendix 10

Tewkesbury Employment Site Proformas

Appendix 10 – Tewkesbury Employment Site Proformas

JCS Sites

Name (Address)	Innsworth and Twigworth
Reference	Policy A1, JCS
Description	Greenfield land extending west and north from Innsworth Technology Park, with some housing under development in the north. The site has been opened up by the completion of Centurion Road, which runs through it
Size, ha	9.1 (4.08 ha net consented area for E(g)/B-Class Uses)
Ownership (Developer, occupier, where relevant)	Robert Hitchins, Taylor Wimpey UK, EPS Electricity (Robert Hitchins are the developers)
Current use	Agriculture/Housing
Market availability	Consented units and offices on the market as Design and Build Options
Planning status	Adopted allocation in the JCS – Policy A1 The wider site has Outline Consent for a mixed use development of up to 1,300 dwellings and 8.31 ha of land for employment generating uses comprising a neighbourhood centre of 4.23ha , office park of 1.31ha (E(g) and business park of 2.77ha (E(g) and B8 uses), primary school, open space, landscaping, parking and supporting infrastructure and utilities, and the creation of new vehicular accesses from the A40 Gloucester Northern Bypass, Innsworth Lane and Frogfurlong Lane (App. No. 15/00749/OUT). Other consents: • The north of the site has consent for multiple housing parcels and a discount foodstore (App. No. 18/01285/APP, 19/00996/APP, 21/00841/APP, 22/01225/APP, 25/00290/APP, 26/00293/APP) • The main access road through the site is consented and developed (App. No. 18/01284/APP) • A site of 1.54 ha has Reserved Matters Consent for a primarily B8 warehouse of 6,028 sqm (App No. 24/00626/APP) • A site of 1.09 ha, north of the previous, has Reserved Matters consent for a primarily B8 warehouse of 4,174 sqm (App. No. 24/00627/APP).
Proposal	The housing in the north is under development by Taylor Wimpey as Whittle Gardens. The employment site of 2.77 ha is on the market, for design and build options, as Innesworth Business Park In the north east of the site, Innsworth Office Park is on the market for new Grade A office buildings of 650-5,946 sqm on 1.31 ha. The development partner for both in Robert Hitchens. Agents for both include Alder King, JLL and Cushman and Wakefield.

Name (Address)	Innsworth and Twigworth
Links to Economic Clusters	The two warehouses proposed enjoy strong access off the A40, linking to facilities around Gloucester such as Unilever as well as east to Advanced Manufacturing facilities around Gloucestershire Airport. The two properties could provide some logistical support to such industries. The existing adjacent Innsworth Technology Park is mostly occupied by traditional manufacturing, engineering and motor trade/repair companies. The role of Key Sectors in Innsworth Office Park will depend on what level and quality of offices are ultimately brought forward here, given national viability constraints in office development. However, a good quality office scheme will likely have a role in supporting the Financial Services, Digital and Technologies and Professional and Business sectors, particularly serving the Gloucester market (as most other office schemes proposed are in and around Cheltenham).
Site Constraints	• Part of site is Flood Zone 2 • Parts of the site are at risk from surface water flooding. • Has a Public Right of Way passing through part of the site • Within 500m of Site of Special Scientific Interest.
Other information	-
Site Scoring	66
Conclusions/Recommendations	Development has Outline and (partially) Reserved Matters consents and is being actively marketed with a development partner associated and key infrastructure in place. There remain questions as to whether Gade a offices can be viably developed here, but the development of E(g)/B-Class uses generally is very likely. The site should be protected for E(g)/B-Class uses in the SLP.
Availability, years	5-10

Name (Address)	South Churchdown
Reference	Policy A2, JCS
Description	Large area of flat agricultural land extending south from the modern Elmbridge Court Business Park at with access through that Business Park directly onto the A40/A417 Elmbridge Court Roundabout.
Size, ha	17.4
Ownership (Developer, occupier, where relevant)	RR Bristol Ltd, Newbridge Construction Ltd, Private Owner
Current use	Agriculture (Existing business park also falls into the JCS allocation)
Market availability	Not available
Planning status	Adopted allocation in the JCS – Policy A2 No relevant planning applications or consents in the area, other than historic consents for infill development within the existing Business Park
Proposal	No identified development proposals, but the site remains available to meet needs, in a key location. Present access through the existing Business Park is constrained and it is expected that a new access off the A417 will be required to open up this land.
Links to Economic Clusters	Elmbridge Court Business Park is a modern good quality businesses park, accommodating a range of micro and small businesses focused on the Financial Services and Professional and Business sectors. Further development could build on this, but its strong location could also support logistics and Advanced Manufacturing, assuming appropriate road access can be provided.
Site Constraints	• Northen section is in Flood Zones 2/3 • Parts of the site are at risk from surface water flooding • Public Right of Way goes through south • Constrained access • Electricity pylon on southwest of site.
Other information	-
Site Scoring	61
Conclusions/Recommendations	Well located growth opportunity site but will require infrastructure investment to bring forward. No identified development plans, but it remains available to meet needs. The site should be protected for E(g)/B-Class uses in the SLP.
Availability, years	10-15

Name (Address)	North Brockworth
Reference	Policy A3, JCS
Description	Linear area of greenfield land, running between the A417 to the north and the Brockworth urban area to the north, accessed via Stilchester Road and Mill Lane. The site runs from the M5 around Junction 11a and Valient Way in the west to the A46 Shurdington Road in the east. Large scale development of housing is occurring across the length of the site.
Size, ha	3.30
Ownership (Developer, occupier, where relevant)	Gloucestershire County Council, Private Individuals, five housebuilders.
Current use	Housing, Vacant, Sports Facilities
Market availability	No available
Planning status	Adopted allocation in the JCS – Policy A3 Site has Outline Consent for a mixed-use development of up to 1,500 dwellings, including extra care housing, community facilities (totalling 2,500 sqm), E(g)/B8 employment uses (totalling 22,000 sqm), health facilities and formal and informal public open space (App. No.12/01256/OUT) The site has consent for multiple housing parcels and sports facilities (App. No. 18/00109/APP, 18/00410/APP, 18/00864/APP, 19/00537/APP, 22/00251/APP).
Proposal	Wider scheme is referred to as Perrybrook Housing under development with housebuilders including Crest Nicholson and Gloucestershire County Council (with the district councils) providing affordable housing The 22,000 sqm of E(g)/B8 employment uses is proposed in the west of the site, adjacent to the M5, south east of Junction 11A. There are no Reserved Matters consents associated with it The land, in part, was marketed for disposal to commercial developers, owner-occupiers, or business park operators but is no longer available. Current development plans are not known.
Links to Economic Clusters	The Outline Application specifically indicates that development here will differ from, and not compete with, nearby Gloucester Business Park. Its position by an M5 Junction and B8 consent make a logistics development likely here which could indirectly support a range of sectors, including Advanced Manufacturing.
Site Constraints	• Trees onsite • Partly in Flood Zones 2-3 • Includes land at risk from surface water flooding
Other information	-
Site Scoring	61
Conclusions/Recommendations	Prominently located employment site, the only plot in the supply directly adjacent to the M5 it will likely attract interest from logistics developers/operators, although there are no clear development plans at this time. The site should be protected for E(g)/B-Class uses in the SLP.
Availability, years	10-15

Policy EMP1 Sites

Name (Address)	Ashville Business Park Extension, Churchdown/Staverton
Reference	Local Plan Policy EMP1
Description	A gravel car park/vehicle storage area, with fencing around the perimeter and access onto Commerce Road. Adjacent uses include a Land Rover Dealership and several high quality production and office facilities.
Size, ha	0.61 (Remaining undeveloped land from a larger site of 3.50 ha)
Ownership (Developer, occupier, where relevant)	Hammonds Rutts Investments
Current use	Car park/vehicle storage area.
Market availability	Not Available
Planning status	Within a Policy EMP1 Major Employment Site No relevant consents
Proposal	In use for parking/car storage for the adjacent car showroom. While it may represent a long term development opportunity, for the foreseeable future it appears to be a well-used and integral part of the showroom and is not available. It is thus not reviewed further.
Links to Economic Clusters	-
Site Constraints	-
Other information	-
Site Scoring	-
Conclusions/Recommendations	-
Availability, years	-

Name (Address)	**Bamfurlong Industrial Park Extension, Churchdown/Staverton**
Reference	Local Plan Policy EMP1
Description	Flat land at the edge of Gloucestershire Airport, to the rear of an existing business park. The site has consent for the development of CGX Connect Business Park, with an access road off the B4063 now completed.
Size, ha	5.90
Ownership (Developer, occupier, where relevant)	Gloucester City Council and Cheltenham Borough Council
Current use	Vacant/Airport
Market availability	On the market for design and build options, primarily through the Airport's Commercial Team
Planning status	Within a Policy EMP1 Major Employment Site Hybrid planning consent for a new business park development, including: • Full permission for the provision of a new site access off the B4063, internal estate roads and associated infrastructure • 2. Outline permission for a mixed use development comprising of E(g), B2 and B8 employment use on 5.9 ha of land (App. No. 20/00758/FUL).
Proposal	The site is on the market as CGX Connect Business Park for 30,000 sqm of floorspace, as design and build opportunities. The access road was completed in 2021/2022. The development is understood to be attracting interest from potential occupiers. At the time of writing it is not clear how ongoing attempts by Gloucester City Council and Cheltenham Borough Council to sell the wider Airport will affect this scheme.
Links to Economic Clusters	Site falls between Bamfurlong Industrial Park, Ashville Business Park and particularly Meteor Business Park, which are key local centres for Advanced Manufacturing with specialisms in Aerospace and Defence, including companies such as Actemium ICS, Safran and Ontic Engineering & Manufacturing. Further high quality premises here provides a strong opportunity to grow this local cluster.
Site Constraints	• Noise from airport • Includes areas of land at risk from surface water flooding.
Other information	-
Site Scoring	67
Conclusions/Recommendations	Key expansion site within the economic cluster of Gloucestershire Airport with a consent for development which is being progressed. It should be protected in the SLP for E(g)/B-class uses.
Availability, years	1-5

Name (Address)	Bamfurlong Industrial Park, Churchdown/Staverton
Reference	Local Plan Policy EMP1 (Infill site not directly identified in the Local Plan)
Description	Large area of hardstanding, comprising the foundations of a demolished building at the frontage of Anson Business Park.
Size, ha	0.60
Ownership (Developer, occupier, where relevant)	Clarkson Evans Holdings
Current use	Hardstanding/vehicle storage
Market availability	Not Available
Planning status	Within a Policy EMP1 Major Employment Site No planning applications/consents .
Proposal	No identified proposals but remains a valuable infill site within a key industrial estate
Links to Economic Clusters	At present this is the only readily available growth site within the airport- linked Employment Areas of the B4063. The wider area includes a substantial group of Advanced Manufacturing/Defence companies, particularly focused towards aerospace including Actemium ICS, Safran, Dowty amongst others. This plot could support small scale growth here.
Site Constraints	None
Other information	-
Site Scoring	56
Conclusions/Recommendations	Small but well located infill site within a key growth cluster for the sub-region. It should be protected in the SLP for E(g)/B-class uses.
Availability, years	1-5

Policy EMP2 Sites

Name (Address)	Homelands Farm Extension, Bishops Cleeve
Reference	Local Plan Policy EMP2
Description	Farmland to the rear of the existing farm complex and accessed through the farm yard. Appears to be a working farm, its is not clear what other businesses are accommodated here.
Size, ha	1.68
Ownership (Developer, occupier, where relevant)	Comparo, Amimarum Properties
Current use	Agricultural
Market availability	Not Available
Planning status	Identified expansion land for a rural Employment Area allocated under policy EMP2 Rural Business Centres An Outline planning application for a small scale 'green' commercial/ business park of up to 4,025 sqm was refused in 2012 due to being outside of the settlement boundary and lacking some information on highways impacts (App. No. 11/00663/OUT).
Proposal	Since the previous application was refused there has been no further attempt to develop E(g)/B-Class uses while land to the south, controlled by the farm, has now been developed for housing. Homelands Farm also appears to function solely as a working farm and it is unclear if any other businesses are accommodated here. There is therefore no strong evidence that this land will be developed for E(g)/B-Class uses and it is not considered further.
Links to Economic Clusters	-
Site Constraints	-
Other information	-
Site Scoring	-
Conclusions/Recommendations	-
Availability, years	-

Name (Address)	Highfield Farm Extension, Elmstone Hardwicke
Reference	Local Plan Policy EMP2
Description	The site comprises grassland to the south of an existing business park, at a road junction. It is bounded by Cursey Lane to the south, the A38 to the west, Highfield Business Park to the north and farmers' fields to the east.
Size, ha	3.30 (2.89 net)
Ownership (Developer, occupier, where relevant)	NCF Engineering Holdings
Current use	Agricultural
Market availability	Not Available
Planning status	Identified expansion land for a rural Employment Area allocated under policy EMP2 Rural Business Centres. A Hybrid planning application was refused at appeal in 2021, primarily relating to its highways impacts App. No. 20/00464/FUL). This sought: • Full planning permission for the erection of a B2 unit (general industrial) with associated landscaping, access and parking. • Outline planning permission (all matters reserved except access) for a mix of B1, B2 and B8 use classes. A Hybrid application for full planning permission for the erection of a B2 unit and outline permission for a mix of E, B2 and B8 uses is being considered (App. No. 22/00864/FUL).
Proposal	The current proposal is for a B2 unit of 2,045 sqm in the south east with additional premises proposed, in outline to the north and west which could total some 2,430sqm. The developable site area is identified as 2.89 ha. Access would be from Cursey Lane in the south. It is understood that the initial building would be developed to meet the needs of the site owner, but that subsequent premises will support other businesses. Regardless of whether this current application is approved there seems to be a clear and ongoing aspiration for development here.
Links to Economic Clusters	Occupancy in the existing Business Park is mixed but does include some Advanced Manufacturing businesses including Red Earth Systems (Aerospace), benefiting from strong A38 access. This development provides some opportunity to growth is cluster although in practice the scheme is likely to meet a range of needs.
Site Constraints	• Parts of the site are at risk from surface water flooding.
Other information	-
Site Scoring	70
Conclusions/Recommendations	Although there are some questions over what will ultimately be consented and delivered here, this site remains an active expansion site for an existing local business park, prominently located on the A38. It should be protected for E(g)/B-class uses in the SLP.
Availability, years	1-5

Name (Address)	**Park Farm Industrial Estate Extension, Gretton**
Reference	Local Plan Policy EMP2
Description	Grassland located east and south east of an existing rural business park.
Size, ha	1.35
Ownership (Developer, occupier, where relevant)	Private Individuals
Current use	Agricultural
Market availability	Not available
Planning status	Identified expansion land for a rural Employment Area allocated under policy EMP2 Rural Business Centres. Three additional workshops were consented on the sites, east of the existing Business Centre in 2025 (App. No. 23/01128/FUL). Several previous consents for workspace have now been delivered.
Proposal	Current consented proposal is for 550 sqm of industrial/storage workspace. The scheme has seen ongoing small scale growth over the 2020s so further expansion appears likely.
Links to Economic Clusters	The current business base here is focused on trade, and motor trade uses in a relatively isolated rural scheme. Its future contribution to meeting the needs of Key Sectors is likely to be limited.
Site Constraints	• Parts of the site are at risk from surface water flooding • Trees on site
Other information	-
Site Scoring	54
Conclusions/Recommendations	Small, rural expansion site but one that is seeing active growth. It should be protected for E(g)/B-Class uses in the SLP.
Availability, years	1-5

Name (Address)	Highnam Business Centre, Highnam
Reference	Local Plan Policy EMP2
Description	This site is bound by Two Mile Lane to the west, Highnam Business Centre to the northwest, B4215 to the northeast and agricultural land to the east and south. It is agricultural land with one small single storey structure in the north and other than that it has no buildings. There is an access point from the existing Business Centre onto the expansion land.
Size, ha	3.0 (1.48 ha net)
Ownership (Developer, occupier, where relevant)	Michael H Keene and Sons Property
Current use	Agriculture
Market availability	Not Available
Planning status	Identified expansion land for a rural Employment Area allocated under policy EMP2 Rural Business Centres Has Outline consent for up to 95 dwellings and up to 3 ha of commercial space (App. No. 21/01392/OUT), granted at appeal.
Proposal	Outline planning permission granted for erection of up to 95 dwellings and up to 3 ha of commercial space was secured in 2023. The housing is proposed on land north of the B4215 appears to be progressing with Bromford Housing Association and secured Reserved Matters consent for appearance, layout, scale and landscaping in May 2026. A Reserved Matters Application for the commercial element is awaiting a decision (App. No. 26/00417/APP). This shows a net developable area of 1.48 ha, to be delivered for 24 units of 73-141 sqm with a total size of 4,084 sqm (GIA). Development will be delivered in four phases, with the first phase being for nine units of 1,070 sqm. The first phase will comprise 100 percent light industrial units. Subsequent phases may incorporate office and research and development accommodation. The development is being progressed by the owners of the existing business park and while the Reserved Matters Application has yet to be approved it shows good evidence that the scheme will be delivered.
Links to Economic Clusters	The existing business centre is a good quality rural scheme, including a wide range of businesses with a focus on Professional and Business Services. The new premises provides an opportunity to grow this, and other sectors, but the rural nature of the scheme means that it will likely accommodate businesses, of all sectors from its immediate catchment area.
Site Constraints	• Grade II listed building in business centre to the northwest. • Parts of the site are at risk from surface water flooding. • Public Right of way crosses the site
Other information	-
Site Scoring	62
Conclusions/Recommendations	Extension to a good quality rural business centre with good prospects for growth. It should continue to be protected for E(g)/B-Class uses in the SLP.
Availability, years	1-5

Name (Address)	Brockeridge Farm Business Centre Extension, Twyning
Reference	Local Plan Policy EMP2
Description	The site is located south of the M50 at Junction 1 and comprises agricultural land extending north and east from the existing business centre to the M50. The eastern side of the site is vacant grassland and has a pond surrounded by trees on in the middle.
Size, ha	14.71 (Reflecting recent consent)
Ownership (Developer, occupier, where relevant)	Tiarks Property Development, Private Owner
Current use	Business centre and agricultural land
Market availability	Not Available
Planning status	Identified expansion land for a rural Employment Area allocated under policy EMP2 Rural Business Centres An Outline application for the extension of Brockeridge Business Park to provide for up to 33,329 sqm of B8 employment use classes was refused in 2025 (App. No. 21/01498/OUT). Previous consented applications include: • Outline planning application for construction of 4,533 sqm of E(g)/B-Class development on 2.49 ha to the east of the existing Business Centre (App. No. 18/00368/OUT) • Construction of 834 sqm of business space (Class E) on land between the business centre and the pond. Reserved Matters consent, building on the above Outline consent (App. No. 21/00057/APP).
Proposal	The Outline application proposes 11.71 ha of gross land to accommodate some 18 units of differing sizes. It was refused for reasons including that the delivery of a large warehouse scheme in this rural area would have unacceptable impacts. Also that insufficient information was provided on a range of transport and environmental issues. The application was from Tiarks Property Development. This scheme was approved at Appeal in June 2026 (Appeal Ref: 6003077) and it is assumed it will now be progressed. Both of the smaller extension applications are also being progressed by Tiarks Property Development. There is thus a strong aspiration for growth here, driven by a developer. A widened estate road accessing the site (App. No. 19/00447/FUL) has also been implemented.
Links to Economic Clusters	The consented proposal is for a logistics scheme which will link to the adjacent motorway junction. This may support some of the key sectors but will likely be focused more on retail and third party logistics which are the most active regional/national logistics markets at present. Other, development will likely comprise a smaller extension to the existing Business Centre, building on its existing cluster of Financial Services and Professional and Business Services businesses.
Site Constraints	• Parts of the site are at risk from surface water flooding. • Grade II listed building in the site to the south • Pond on site • Trees onsite.
Other information	-
Site Scoring	58
Conclusions/Recommendations	There are strong aspirations for growth here, and the larger logistics scheme has now been approved and should be identified and protected for E(g)/B-Class uses in the SLP.
Availability, years	5-10

Name (Address)	Duddage Manor Business Park, Twyning
Reference	Local Plan Policy EMP2
Description	This site is south of Brockeridge Road and west of Duddage Manor Business Park. It is vacant/grassland and is accessible via the existing Business Park.
Size, ha	0.53 (1.13 ha, net consented)
Ownership (Developer, occupier, where relevant)	Private Owner
Current use	Vacant/agriculture
Market availability	Not Available
Planning status	Identified expansion land for a rural Employment Area allocated under policy EMP2 Rural Business Centres The site has Outline consent for E(g), B2, B8 premises comprising six larger units and six smaller units (App. No. 21/01384/OUT), consented in 2024.
Proposal	Nine industrial buildings are proposed in total to provide a relocation for an existing company including six starter units of some 100 sqm each for fledgling companies to develop their business. Some 3,000 sqm in total. The proposal covers 1.13 ha of net land. The application was made by Rhino Land. The site is now on the market, for sale, with the consent at a guide price of £1 million (Fisher German are agents). Implementation will thus be dependent on the plans of the new owner.
Links to Economic Clusters	Scheme will build on an existing rural business centre which accommodates companies such as Aquamarine Chemicals and Cool Concerns (a training provider on refrigeration) which have at least links to Advanced Manufacturing. A stronger element of offices here would also allow the site to support businesses in Professional and Business Services, Financial Services and possibly Creative Industries/Digital Technologies, mostly drawn from the surrounding rural catchment but possibly also linked to the nearby Motorway junction.
Site Constraints	• Public Right of Way crosses the site
Other information	-
Site Scoring	52
Conclusions/Recommendations	Expansion site, with ongoing prospects for growth particularly to deliver smaller starter units for new businesses and those moving into their first accommodation. It should be protected in the SLP for E(g)/B-Class uses.
Availability, years	1-5

Name (Address)	Withytrees Farm Extension, Winchcombe
Reference	Local Plan Policy EMP2
Description	The site is east of B4632 and is also bounded by rail tracks to the north. It comprises undeveloped land in the frontage of the business park including three sections of hardstanding, mostly used as car parking. To the west of this there is green/vacant space with a small road bisecting the 2 areas.
Size, ha	0.41 (remaining undeveloped land)
Ownership (Developer, occupier, where relevant)	Two Private Owners
Current use	Vacant
Market availability	Not available
Planning status	Identified expansion land for a rural Employment Area allocated under policy EMP2 Rural Business Centres Wider site is subject to an existing planning consent for refurbishment and partial redevelopment (App. No.11/00545/FUL) which has been at least partially implemented.
Proposal	No identified plans specifically for the remaining undeveloped land.
Links to Economic Clusters	Existing Businesses Park mostly offers budget quality space to local firms, with a focus on retail/trade uses. Nearby Isbourne Business Centre is similar. Unless new space is of a notably higher quality it is unlikely to have a significant role is supporting Key Sector development.
Site Constraints	• Parts of the site are at risk from surface water flooding. • Area of Natural Beauty • Public Right of Way crosses the site.
Other information	-
Site Scoring	37
Conclusions/Recommendations	Small infill plot in an existing rural business park. There are no identified plans here, but the plot could still have a modest role in supporting rural growth. It should be protected in the SLP for E(g)/B-Class uses.
Availability, years	10-15

Tewkesbury Business Park Sites

Name (Address)	Tewkesbury Business Park, Tewkesbury
Reference	Local Plan Policy EMP1 (Infill site not directly identified in the Local Plan)
Description	Located in the south side of Tewkesbury Business Park, west of Travelodge and north of Porsche. The site is mainly vacant grassland.
Size, ha	0.40
Ownership (Developer, occupier, where relevant)	Grace Pension Trustees
Current use	Vacant
Market availability	Not Available
Planning status	Within a Policy EMP1 Major Employment Site No planning applications/consents
Proposal	No identified plans
Links to Economic Clusters	Small infill plot within a large, mixed employment area and well located in terms of services and strategic road access. A mostly industrial area, Tewkesbury Business Park includes a number of Advanced Manufacturing companies such as Geometric Manufacturing, with Moog close by. There are also some Professional and Business Services and Digital and Technologies businesses in the area, including Paragon. This site could allow modest growth in these sectors. It's position could support an office use, if viable.
Site Constraints	None
Other information	-
Site Scoring	56
Conclusions/Recommendations	Small infill site, with some potential to support Key Sectors. Public partners could usefully engage with the site owners to determine if they have any plans for investment, and what support might be needed to allow its development. The site should be protected for E(g)/B-Class uses, avoiding its development for other services, if possible.
Availability, years	15+

Cleeve Business Park, Bishops Cleeve Sites

Name (Address)	Miles Road, Cleeve Business Park
Reference	Local Plan Policy EMP1 (Infill site not directly identified in the Local Plan)
Description	The site sits at the north of Cleeve Business Park, a secure facility for GE. It fronts the site on the A435 at Miles Road entrance and comprises grassland
Size, ha	1.74
Ownership (Developer, occupier, where relevant)	GE Aviation Systems
Current use	Vacant/grassland
Market availability	Not Available
Planning status	Within a Policy EMP1 Major Employment Site No planning applications/consents
Proposal	No identified development plans. Site forms part of the secure GE site and would most likely be developed by that occupier. However the site is located on the main road frontage and could be separated out and offered to other businesses.
Links to Economic Clusters	Would most likely be developed for the use of GE or another company in its supply chain, with a focus on Advanced Manufacturing/Defence.
Site Constraints	• Parts of the site are at risk from surface water flooding.
Other information	-
Site Scoring	63
Conclusions/Recommendations	Infill site within facilities for a major regional employer. Protect for E(g)/B-Class uses in the SLP.
Availability, years	10-15

Name (Address)	**Orchard Road, Cleeve Business Park**
Reference	Local Plan Policy EMP1 (Infill site not directly identified in the Local Plan)
Description	Grassed area, plus some car parking in the heart of the secure GE complex, bounded by Blackburn Road, Miles Road, Orchard Road, Vickers Road.
Size, ha	1.86
Ownership (Developer, occupier, where relevant)	GE Aviation Systems
Current use	Grassland and car parking
Market availability	Not Available
Planning status	Within a Policy EMP1 Major Employment Site No planning applications/consents
Proposal	No identified development plans. Site forms part of the secure GE site and would most likely be developed by that occupier. This site sits in the heart of the GE facility and thus could not be easily split off and offered to other businesses to meet wider economic needs. It is thus not considered further.
Links to Economic Clusters	-
Site Constraints	-
Other information	-
Site Scoring	-
Conclusions/Recommendations	-
Availability, years	-

Name (Address)	**Blackburn Road, Cleeve Business Park**
Reference	Local Plan Policy EMP1 (Infill site not directly identified in the Local Plan)
Description	This site sits within Cleeve Business Park and is comprised of four separate fields, south of Furlong Business Park located off the A435 and north/west of GE Aerospace.
Size, ha	6.23
Ownership (Developer, occupier, where relevant)	Smiths Aerospace, GE Aviation Systems
Current use	Agriculture
Market availability	Not Available
Planning status	Within a Policy EMP1 Major Employment Site No planning applications/consents
Proposal	No identified development plans. Site forms part of the secure GE site and would most likely be developed by that occupier. However the site is also accessible from Furlong Business Park to the north and thus and could be separated out and offered to other businesses.
Links to Economic Clusters	Would most likely be developed for the use of GE or another company in its supply chain, with a focus on Advanced Manufacturing/Defence.
Site Constraints	• Parts of the site are at risk from surface water flooding.
Other information	-
Site Scoring	66
Conclusions/Recommendations	Infill site within facilities for a major regional employer. Protect for E(g)/B-Class uses in the SLP.
Availability, years	10-15

Gloucester Business Park Sites

Name (Address)	Land west of Pioneer Avenue, Gloucester Business Park (Plot 2100 or Plot 5)
Reference	N/A
Description	This site is located in the eastern part of Gloucester Business Park and is bounded by Lobleys Drive to the south, Stearman Walk to the west, Benefact House and secure car parking to the north, and Pioneer Avenue to the east. The site comprises undeveloped grassland.
Size, ha	1.40
Ownership (Developer, occupier, where relevant)	Gloucester BP Developments (Arlington)
Current use	Vacant/grassland
Market availability	On the market, available for design and build development
Planning status	Within an allocated Employment Area under Policy EMP1 Major Employment Sites – Gloucester Business Park The wider Business Park benefits from an extant planning consent (original outline consent granted in 1992 (App. No. 88T/7689/01/01 and subsequently extended with consent references App. No. 01/7689/0095/FUL and App. No. 11/01155/FUL) for office, industrial and warehouse uses. Reserved Matters consent for an industrial/warehouse development (App. 23/00276/APP).
Proposal	The site has consent for a 6,773sqm (GIA) industrial or warehouse building. The site, along with five others is now being actively marketed for a design and build development with agents Alder King and CBRE.
Links to Economic Clusters	Proposed for industrial/warehouse uses in Gloucester Business Park which is an established centre for Advanced Manufacturing with occupiers including TBS Engineering, G-TEKT Europe and Dowty (aerospace/defence) as well as offices for defence companies such as Lockheed Martin and BAE Systems. This plot could support growth in those sectors. The Business Park also has a sizable cluster of Financial Services and Professional Services companies such as Handelsbanken and Benefact Trust, but the site is not proposed for office uses.
Site Constraints	• Parts of the site are at risk from surface water flooding.
Other information	-
Site Scoring	68
Conclusions/Recommendations	Small but prominent expansion site in a key sub-regional business park with potential to support the growth of key economic clusters. It should be protected for E(g)/B-Class development in the SLP.
Availability, years	1-5

Name (Address)	Land South of Lobleys Drive, Gloucester Business Park (Plot 4)
Reference	N/A
Description	This site is located in the southern part of Gloucester Business Park and bounded by Gambet Road to the west, Lobleys Drive to the north, Buccaneer Avenue to the east, and Martlet Way to the south. The site comprises undeveloped grassland but does include a helipad in the east.
Size, ha	2.6
Ownership (Developer, occupier, where relevant)	Gloucester BP Developments (Arlington)
Current use	Vacant/grassland
Market availability	On the market, available for design and build development
Planning status	Within an allocated Employment Area under Policy EMP1 Major Employment Sites – Gloucester Business Park The wider Business Park benefits from an extant planning consent (original outline consent granted in 1992 (App. No. 88T/7689/01/01 and subsequently extended with consent references App. No. 01/7689/0095/FUL and App. No. 11/01155/FUL) for office, industrial and warehouse uses. Reserved Matters consent for an industrial/warehouse development (App. 23/00275/APP).
Proposal	The site has consent for 16,481sqm (GIA) of industrial or warehouse premises, spread across Plots 3-4 The site, along with five others is now being actively marketed for a design and build development with agents Alder King and CBRE.
Links to Economic Clusters	Proposed for industrial/warehouse uses in Gloucester Business Park which is an established centre for Advanced Manufacturing with occupiers including TBS Engineering, G-TEKT Europe and Dowty (aerospace/defence) as well as offices for defence companies such as Lockheed Martin and BAE Systems. This plot could support growth in those sectors. The Business Park also has a sizable cluster of Financial Services and Professional Services companies such as Handelsbanken and Benefact Trust, but the site is not proposed for office uses.
Site Constraints	• Parts of the site are at risk from surface water flooding.
Other information	-
Site Scoring	69
Conclusions/Recommendations	Small but prominent expansion site in a key sub-regional business park with potential to support the growth of key economic clusters. It should be protected for E(g)/B-Class development in the SLP.
Availability, years	1-5

Name (Address)	**Land south of Hurricane Road, Gloucester Business Park (Plot 3)**
Reference	N/A
Description	This site is located in the southern part of Gloucester Business Park and is bounded by Buccaneer Avenue to the west, Hurricane Road to the north, Elite Extrusion Die's premises to the east, and Martlet Way to the south. The site comprises undeveloped grassland.
Size, ha	0.80
Ownership (Developer, occupier, where relevant)	Gloucester BP Developments (Arlington)
Current use	Vacant/grassland
Market availability	On the market, available for design and build development
Planning status	Within an allocated Employment Area under Policy EMP1 Major Employment Sites – Gloucester Business Park The wider Business Park benefits from an extant planning consent (original outline consent granted in 1992 (App. No. 88T/7689/01/01 and subsequently extended with consent references App. No. 01/7689/0095/FUL and App. No. 11/01155/FUL) for office, industrial and warehouse uses. Reserved Matters consent for an industrial/warehouse development (App. 23/00275/APP).
Proposal	The site has consent for 16,481sqm (GIA) of industrial or warehouse premises, spread across Plots 3-4 The site, along with five others is now being actively marketed for a design and build development with agents Alder King and CBRE.
Links to Economic Clusters	Proposed for industrial/warehouse uses in Gloucester Business Park which is an established centre for Advanced Manufacturing with occupiers including TBS Engineering, G-TEKT Europe and Dowty (aerospace/defence) as well as offices for defence companies such as Lockheed Martin and BAE Systems. This plot could support growth in those sectors. The Business Park also has a sizable cluster of Financial Services and Professional Services companies such as Handelsbanken and Benefact Trust, but the site is not proposed for office uses.
Site Constraints	• Parts of the site are at risk from surface water flooding.
Other information	-
Site Scoring	64
Conclusions/Recommendations	Small but prominent expansion site in a key sub-regional business park with potential to support the growth of key economic clusters. It should be protected for E(g)/B-Class development in the SLP.
Availability, years	1-5

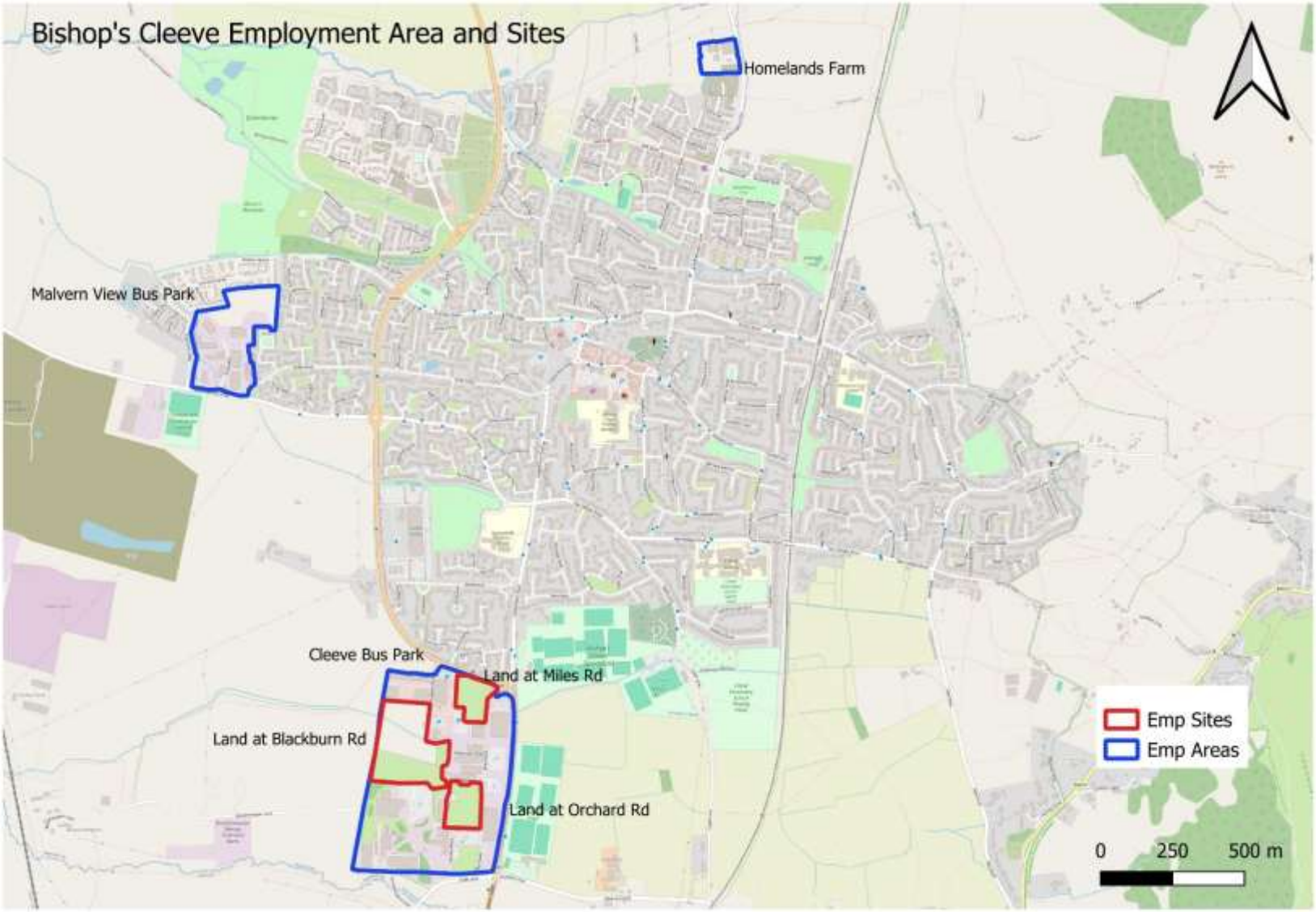
Name (Address)	Land East of Hurricane Road, Gloucester Business Park
Reference	N/A
Description	This site is located within Gloucester Business Park and is bounded by Safran's warehouse unit to the north, Golf Club Lane to the east, TBS Engineering to the south, and a picnic/seating area to the west. The site forms an undeveloped part of the TBS Engineering site and has access to Hurricane Road in the west.
Size, ha	0.80
Ownership (Developer, occupier, where relevant)	TBS Engineering
Current use	Vacant/grassland
Market availability	Not Available
Planning status	Within an allocated Employment Area under Policy EMP1 Major Employment Sites – Gloucester Business Park The wider Business Park benefits from an extant planning consent (original outline consent granted in 1992 (App. No. 88T/7689/01/01 and subsequently extended with consent references App. No. 01/7689/0095/FUL and App. No. 11/01155/FUL) for office, industrial and warehouse uses.
Proposal	No identified plans for development. The site is most likely to be held for the further expansion of the TBS factory but could be made available to meet wider business needs. In June 2026 TBS Engineering was acquired by Rosendahl Nextrom, with the intention to grow their combined operations in the production of batteries. It is not yet clear if this will require the physical expansion of the TBS facilities at Gloucester Business Park.
Links to Economic Clusters	If used by TBS for expansion it would directly support the Advanced Manufacturing sector, within a wider cluster of Advanced Manufacturing and Defence businesses.
Site Constraints	• Parts of the site are at risk from surface water flooding.
Other information	Within Application No. 17/01379/APP it states in the landscape masterplan that this site is a future expansion area.
Site Scoring	60
Conclusions/Recommendations	Small but prominent expansion site in a key sub-regional business park with potential to support the growth of key economic clusters. It should be protected for E(g)/B-Class development in the SLP.
Availability, years	5-10

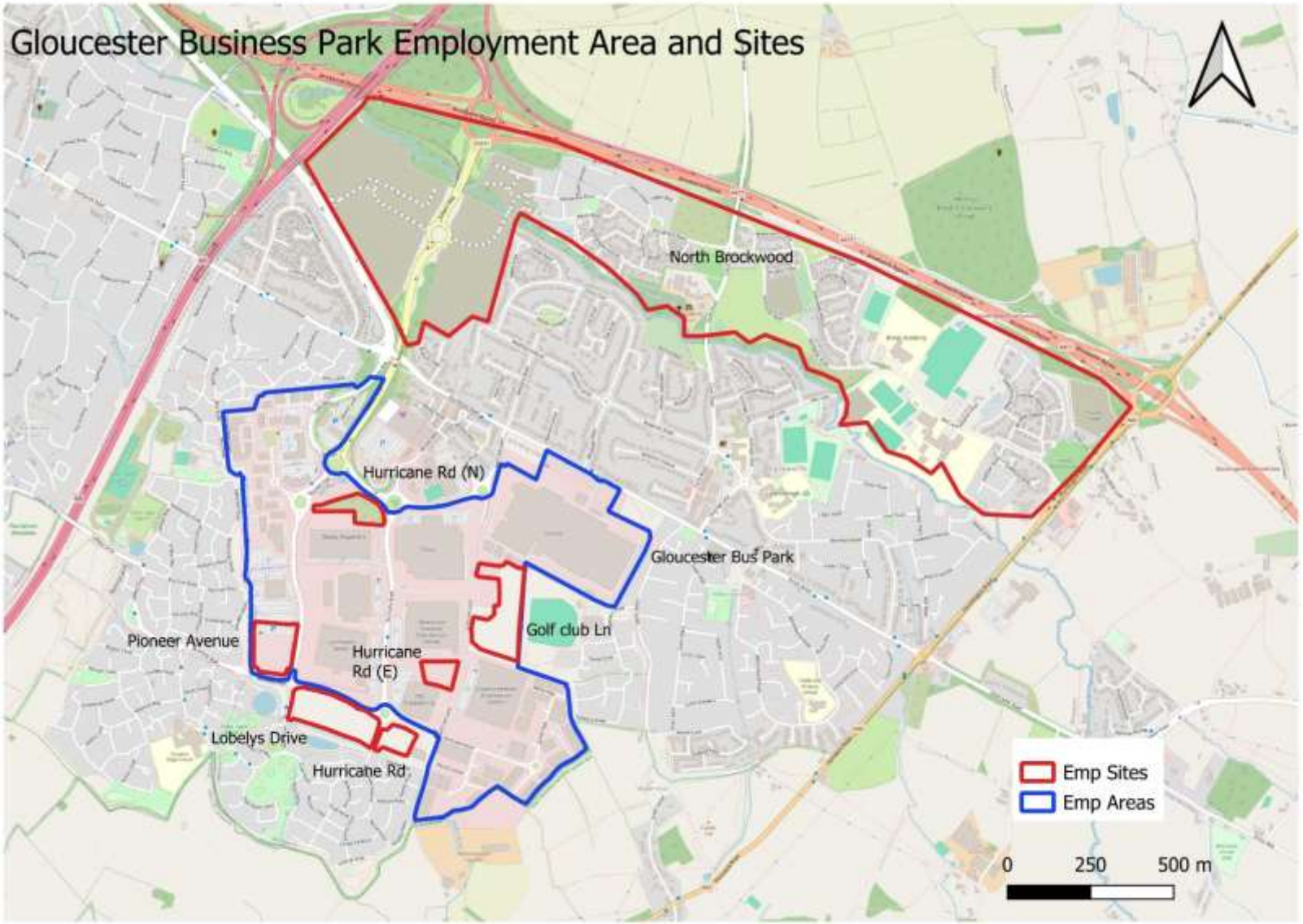
Name (Address)	Golf Club Lane, Gloucester Business Park (Includes Plot 2)
Reference	N/A
Description	This site is located on the eastern side of Gloucester Business Park and is bounded by Invista Textiles to the north, Ullenwood Bharat Cricket Club to the east, a public footpath to the south, and Golf Club Lane to the west. The site compromises mainly grassland, with a small area of hardstand in the northwestern corner that is used for ancillary storage. Access is via Golf Club Lane, which is an unsurfaced, narrow private road for much of its length.
Size, ha	3.80 (1 ha appears developable)
Ownership (Developer, occupier, where relevant)	Invista Textiles (U.K.) Ltd, Cotsworld Chase Management Company (Gloucester) Ltd (Gloucester BP Developments (Arlington) is developer)
Current use	Vacant/mostly grassland
Market availability	Not Available
Planning status	Within an allocated Employment Area under Policy EMP1 Major Employment Sites – Gloucester Business Park. The wider Business Park benefits from an extant planning consent (original outline consent granted in 1992 (App. No. 88T/7689/01/01 and subsequently extended with consent references App. No. 01/7689/0095/FUL and App. No. 11/01155/FUL) for office, industrial and warehouse uses. Site has outline consent, secured at appeal, for a mixed-use development of 220 dwellings, B8 warehousing, provision of a cricket pitch and pavilion, and other associated public open space and highway works (App. No. 11/00091/OUT). Reserved Matters Consent was secured, in 2023, by Gloucester BP Developments (Arlington) for a B2/B8 industrial/warehouse development (App. No. 23/00274/APP).
Proposal	Of the mixed use consent, the housing and sports facilities have been developed but the 13,600 sqm of B8 floorspace with 675 sqm of ancillary office space has not been developed. Access for this development has also yet to be provided. This consent was secured by landowner Invista Textiles (UK) Ltd. After some 15 years it appears unlikely that this proposal will now be implemented. The Reserved Matters Consent is for 3,259 sqm (GIA) of industrial/warehouse premises on 1 ha including arrangements for an improved access along Golf Club Lane. The site, along with five others is now being actively marketed for a design and build development with agents Alder King and CBRE.
Links to Economic Clusters	Proposed for industrial/warehouse uses in Gloucester Business Park which is an established centre for Advanced Manufacturing with occupiers including TBS Engineering, G-TEKT Europe and Dowty (aerospace/defence) as well as offices for defence companies such as Lockheed Martin and BAE Systems. This plot could support growth in those sectors. The Business Park also has a sizable cluster of Financial Services and Professional Services companies such as Handelsbanken and Benefact Trust, but the site is not proposed for office uses.
Site Constraints	• Constrained road access • Parts of the site are at risk from surface water flooding • Trees in southwest of the site

Name (Address)	Golf Club Lane, Gloucester Business Park (Includes Plot 2)
Other information	-
Site Scoring	60
Conclusions/Recommendations	Constrained backland site which will require investment to deliver. However, 1 ha is being actively promoted for industrial/warehouse development alongside other opportunity sites in the Business Park. It should be protected for E(g)/B-Class development in the SLP.
Availability, years	5-10

Appendix 11

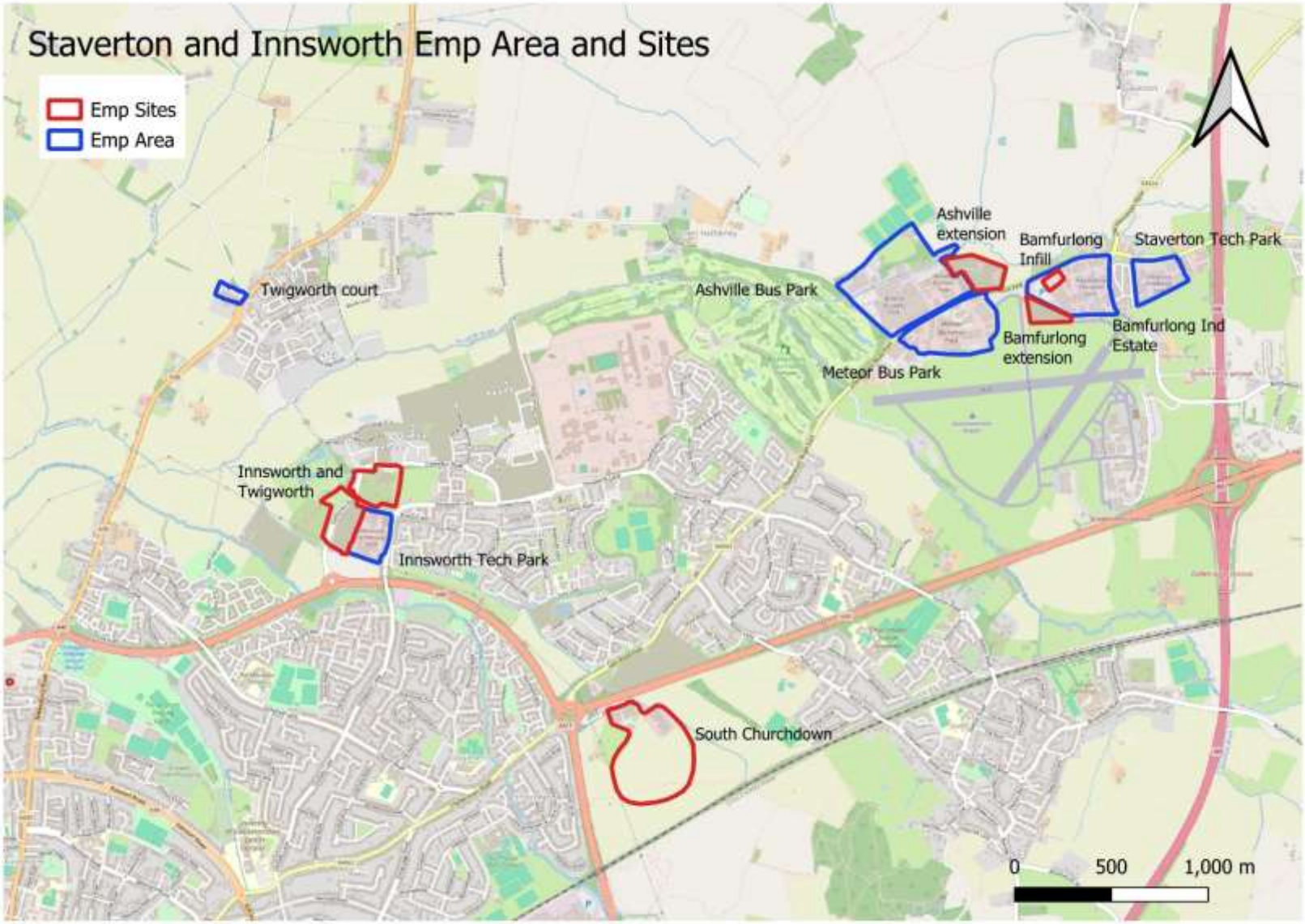
Tewkesbury Employment Areas and Sites Maps


Bishop's Cleeve Employment Area and Sites
Homelands Farm
Malvern View Bus Park
Cleeve Bus Park
Land at Miles Rd
Land at Blackburn Rd
Land at Orchard Rd
Emp Sites
Emp Areas
0
250
500 m

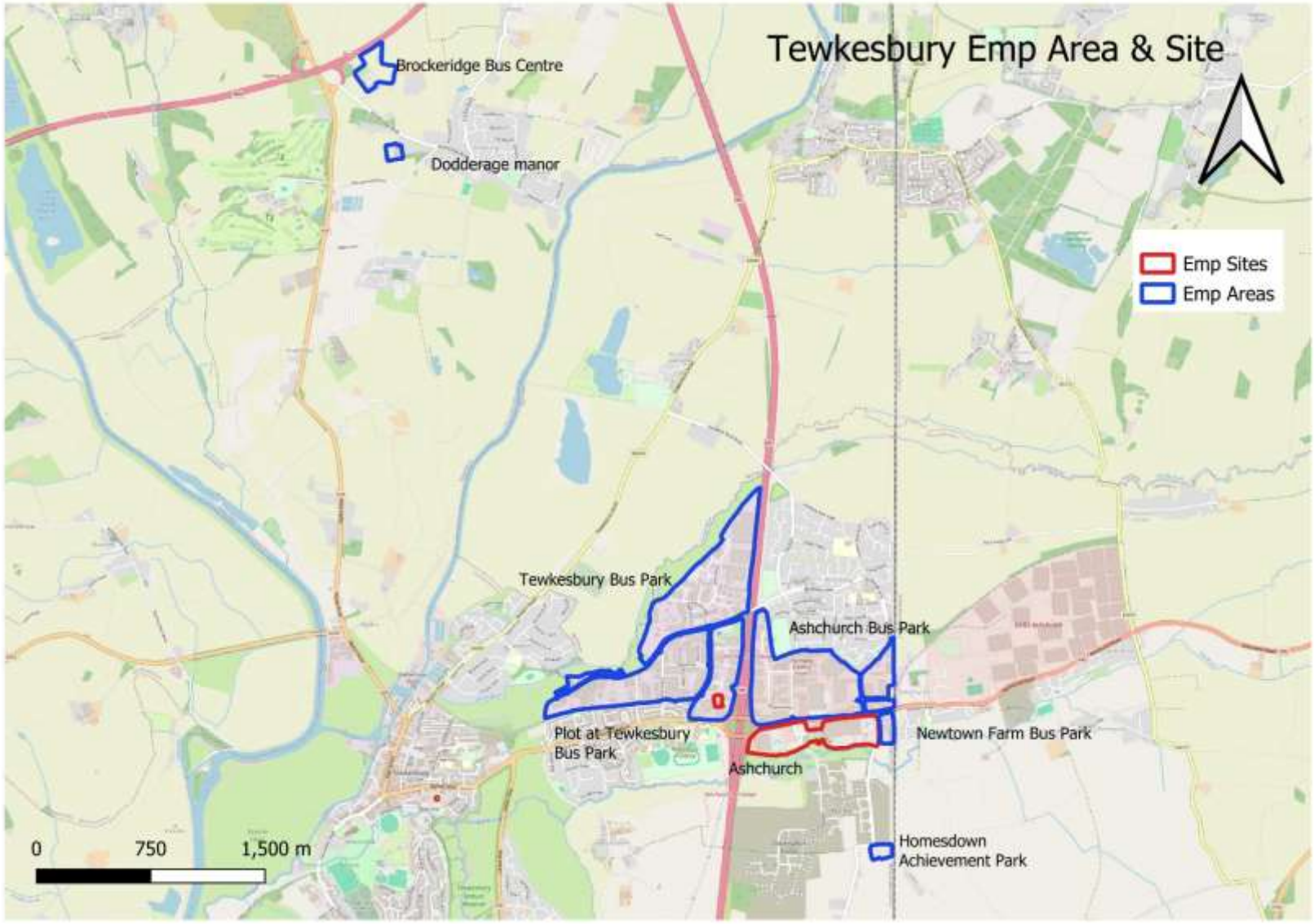

Gloucester Business Park Employment Area and Sites
North Brockwood
Hurricane Rd (N)
Gloucester Bus Park
Golf club Ln
Pioneer Avenue
Hurricane
Rd (E)
Lobelys Drive
Hurricane Rd
Emp Sites
Emp Areas
0
250
500 m


Tewkesbury Rural Employment Areas And Sites
Emp Sites
Emp Areas
Orchard Ind Estate
Park farm Ind Estate
Withytrees farm EX
Withytrees Farm
Isbourne Bus cemtre EX
Isbourne Bus centre
0
500
1,000 m


Tewkesbury Rural Employment Areas
The Steadings
Hignam Business centre
0
250
500 m


Staverton and Innsworth Emp Area and Sites
Emp Sites
Emp Area
Twigworth court
Ashville Bus Park
Ashville extension
Bamfurlong Infill
Staverton Tech Park
Bamfurlong extension
Bamfurlong Ind Estate
Meteor Bus Park
Innsworth and Twigworth
Innsworth Tech Park
South Churchdown
0
500
1,000 m


Knightsbridge and Highfield Farm
Employment Area
Highfield Farm
Highfield Farm
Extension
Knightsbridge Business Centre
0
250
500 m


Tewkesbury Emp Area & Site
Brockeridge Bus Centre
Dodderage manor
Emp Sites
Emp Areas
Tewkesbury Bus Park
Ashchurch Bus Park
Plot at Tewkesbury Bus Park
Ashchurch
Newtown Farm Bus Park
Homesdown Achievement Park
0
750
1,500 m

Appendix 12

Tewkesbury Employment Area Proformas

Appendix 12 – Tewkesbury Employment Area Proformas

Local Plan Policy EMP1 Major Employment Sites

Name (Address)	Cleeve Business Park (Bishops Cleeve)
Reference	T1.1 (EMP1)
Description	Good quality, low density secure facility for GE Aerospace on the edge of Bishops Cleve, off the A435 road to Cheltenham. It also includes a smaller, average/good quality group of industrial and warehouse units in the north west, including some recently developed.
Key Occupier(s)	GE Aerospace ,Ontic Engineering & Manufacturing UK
Dominant Uses/Business Sectors	Dominated by several Advanced Manufacturing companies, with a more mixed group of companies in the North West including food producers, construction and photography
Links to Key Economic Clusters	GE is a major Advanced Manufacturing facility, with an Aerospace specialism, for the SLP Area, linked to the larger aerospace cluster around Gloucestershire Airport. Ontic also has an Aerospace focus.
Percentage Occupied	100
Size, ha	32.4
Building Age	1990-2000, 2010+
Building Quality	Good
Area Constraints	• Public Rights of Way cross the site • Trees on site • Includes areas of land at risk from surface water flooding
Opportunities for Expansion/Regeneration	The GE facility includes 9.83 ha (gross) of expansion land, in three plots, which has been included in Tewkesbury's employment land supply.
Other Information	-
Recommendation	A key Advanced Manufacturing facility for the SLP Area, including expansion land, along with a valuable stock of modern industrial units. The area should be protected in the SLP for E(g)/B-Class uses.
Grading	A

Name (Address)	Malvern View Business Park (Bishops Cleeve)
Reference	T1.2 (EMP1)
Description	A local industrial estate comprising a range of small and mid-sized industrial and warehouse properties, on an edge of centre location off Stoke Road.
Key Occupier(s)	Edgewest Plastics, Skyline Systems, Kiwa Training, Shorade
Dominant Uses/Business Sectors	Mixed group of occupiers in areas such as construction, training, manufacturing, vehicle repair and vehicle hire.
Links to Key Economic Clusters	A mixed group of companies, mostly serving the local market and with only limited links to wider clusters.
Percentage Occupied	100
Size, ha	6.32
Building Age	1990-2010
Building Quality	Average
Area Constraints	• Trees on site • Includes areas of land at risk from surface water flooding • Housing adjacent
Opportunities for Expansion/Regeneration	The previously identified expansion land to the south west is now under development for a gym. There is 2.37 ha of undeveloped scrubland to the north, accessible from Stella Way which could allow some growth, although it is close to housing.
Other Information	-
Recommendation	Active local industrial estate, accommodating a range of local businesses. The area should be protected in the SLP for E(g)/B-Class uses.
Grading	C

Name (Address)	Gloucester Business Park, Brockworth
Reference	T1.3 (EMP1)
Description	Strategic scale, mixed business park on the edge of Gloucester, including a group of large moder offices in the north west and larger B2/B8 units in the south east, with access to Junction 11A, M5.
Key Occupier(s)	G-TEKT Europe, Laithwaite's, Dowty, BAE Systems, Invista, TBS Engineering, Lockheed Martin
Dominant Uses/Business Sectors	Mixed manufacturing including textiles, battery production and aerospace as well as logistics. Also a range of professional, financial and legal office uses.
Links to Key Economic Clusters	Includes the largest office park in the SLP Area which accommodates a range of regional and national firms with a focus on Financial Services. Also accommodates a cluster of large established firms in Advanced Manufacturing including Dowty (Aerospace) TBS Engineering (battery production). The office component also includes administrative facilities for major defence companies including BAE Systems and Lockheed Martin
Percentage Occupied	95
Size, ha	106.7
Building Age	Mixed
Building Quality	Good
Area Constraints	• Parts of the site are at risk from surface water flooding • Trees onsite • Housing adjacent
Opportunities for Expansion/Regeneration	Includes 9.40 ha of expansion land, in five plots, which has been included with Tewkesbury's employment land supply.
Other Information	-
Recommendation	Major mixed industrial, warehouse and office park accommodating a range of national (and international) businesses in strategic scale facilities. The area should be protected in the SLP for E(g)/B-Class uses.
Grading	A

Name (Address)	**Staverton Technology Park (Churchdown / Staverton)**
Reference	T1.4 (EMP1)
Description	Small, local scale industrial estate, in two parts with mid-sized units to the west, off Herrick Way, and smaller workshops in the east, off Staverton Connection. The area is located north east of Gloucestershire Airport and falls into its wider employment cluster.
Key Occupier(s)	Creed, Future Advanced Manufacture, BRG Technologies, Horsebridge Network Systems, Pennant International Group
Dominant Uses/Business Sectors	Construction, mixed manufacturing, food production, trade and motor trade
Links to Key Economic Clusters	The area includes some Advanced Manufacturing companies Pennant International but mostly meets local requirements for small and mid-sized industrial units supporting a broad range of sectors.
Percentage Occupied	100
Size, ha	4.70
Building Age	1990-2010
Building Quality	Average
Area Constraints	• Most of the area is in Flood Zones 2/3 (Hatherley Brook passes through the area) • Parts of the site are at risk from surface water flooding • Trees onsite • Housing adjacent
Opportunities for Expansion/Regeneration	Land to the south is identified as an option for growth in the HELAA.
Other Information	-
Recommendation	Active local industrial estate, falling into a wider cluster. The area should be protected in the SLP for E(g)/B-Class uses.
Grading	C

Name (Address)	Meteor Business Park (Churchdown / Staverton)
Reference	T1.5 (EMP1)
Description	A modern industrial estate comprising mostly mid-sized industrial properties which accommodate a number of high value Advanced Manufacturing firms. The area is located north west of Gloucestershire Airport and falls into its wider employment cluster.
Key Occupier(s)	Safran, Quickmach Engineering, Ontic Engineering and Manufacturing, Spectrum Medical, Actemium ICS
Dominant Uses/Business Sectors	Advanced Manufacturing (Aerospace), Engineering, Medical
Links to Key Economic Clusters	Business Park has a key cluster of Advanced Manufacturing businesses, with an emphasis on Aerospace and Defence.
Percentage Occupied	90
Size, ha	10.5
Building Age	1990-2010, 2010+
Building Quality	Good
Area Constraints	• Parts of the site are at risk from surface water flooding
Opportunities for Expansion/Regeneration	Airport land to the east has been put forward as a growth option in the HELAA.
Other Information	-
Recommendation	High quality industrial estate of regional significance, falling into a wider cluster. The area should be protected in the SLP for E(g)/B-Class uses.
Grading	A

Name (Address)	Ashville Business Park (Churchdown / Staverton)
Reference	T1.6 (EMP1)
Description	Group of mostly larger industrial and warehouse units, including some good quality new development in the east. Includes a major production facility for Safran in the west. The area is located north west of Gloucestershire Airport and falls into its wider employment cluster.
Key Occupier(s)	Spectrum Medical, St Johns Ambulance, Safran
Dominant Uses/Business Sectors	Advanced Manufacturing (Aerospace), Engineering, Medical, Motor Trade
Links to Key Economic Clusters	Includes major Advanced Manufacturing facilities for Safran, one of several facilities for this company in the Airport area. Several other high value companies in the area, e.g. Spectrum Medical.
Percentage Occupied	90
Size, ha	20.9
Building Age	Mixed
Building Quality	Average
Area Constraints	• Most of the north area is in Flood Zones 2/3 (Hatherley Brook passes through the area) • Parts of the site are at risk from surface water flooding • Trees onsite
Opportunities for Expansion/Regeneration	Expansion land in the east has now been developed or is in use for car storage.
Other Information	-
Recommendation	High quality industrial estate of regional significance, falling into a wider cluster. The area should be protected in the SLP for E(g)/B-Class uses. The developed expansion land should be included in the area boundary. The Jaguar-Landover and Mercades car dealerships on the frontage could be excluded from the Area.
Grading	A

Name (Address)	**Bamfurlong Technology Park (Churchdown / Staverton)**
Reference	T1.7 (EMP1)
Description	Mixed industrial park with some larger industrial and warehouse businesses in the west (Anson Business Park), including some Advanced Manufacturing companies, and older accommodation for local businesses in the east. The area is located north east of Gloucestershire Airport and falls into its wider employment cluster.
Key Occupier(s)	Saint-Gobain Abrasives, Intoco, Dowty, Piston Distillery, The Fulfilment Warehouse
Dominant Uses/Business Sectors	Mixed manufacturing including Aerospace, Engineering, Steel and other materials as well as a distillery, some logistics, trade and health and safety consultancy
Links to Key Economic Clusters	As with other Employment Areas around the Airport, the Area accommodates several Advanced Manufacturing companies, with an Aerospace/Defence focus, most notably Dowty.
Percentage Occupied	85
Size, ha	10.2
Building Age	Mixed
Building Quality	Average
Area Constraints	• Parts of the site are at risk from surface water flooding • Trees onsite
Opportunities for Expansion/Regeneration	Area has two identified expansion sites: • Bamfurlong Industrial Park Extension (Consented for a new business park development, CGX Connect Business Park, of 30,000 sqm west of the existing Employment Area) – 5.90 ha • Bamfurlong Industrial Park (land in Anson Business Park) – 0.60 ha. Both are considered further as Employment Sites for Tewkesbury.
Other Information	-
Recommendation	Average quality industrial estate accommodating a mix of local and regional/national firms, with consent for further growth, falling into a wider cluster. The area should be protected in the SLP for E(g)/B-Class uses.
Grading	B

Name (Address)	**Innsworth Technology Park (Innsworth)**
Reference	T1.8 (EMP1)
Description	Small, mixed industrial estate, accommodating mostly local businesses in an edge of settlement area, surrounded by a sub-regional development area and with improved access off the A40.
Key Occupier(s)	Versatile Controls, GB Forklifts, D G Welding, PJT Pumping Services
Dominant Uses/Business Sectors	Trade and motor repair, construction and mixed engineering
Links to Key Economic Clusters	Accommodates a mix of local companies with limited links to Key Sectors
Percentage Occupied	100
Size, ha	4.2
Building Age	1945-1990
Building Quality	Average
Area Constraints	• Parts of the site are at risk from surface water flooding
Opportunities for Expansion/Regeneration	Area is bounded by the JCS allocation A1: Innsworth and Twigworth with 4.08 ha of land allocated for employment. Road access from the A40 has been completed for this. This is considered further as Employment sites for Tewkesbury.
Other Information	
Recommendation	Small but active and well occupied local industrial estate, which links to a key sub-regional growth area. The area should be protected in the SLP for E(g)/B-Class uses.
Grading	C

Name (Address)	Tewkesbury Business Park (Tewkesbury)
Reference	T1.9 (EMP1)
Description	A very large mixed use site for industrial, warehousing and office uses. It incorporates larger industrial units in the east and more local scale properties in the west. Forms part of a larger business cluster in Tewkesbury, around Junction 9, M5.
Key Occupier(s)	Hydro Building Systems, Eastbrook Work, L3Harris Tewkesbury, Smiths, Smurfit Westrock, Cotteswold Dairy
Dominant Uses/Business Sectors	Construction, mixed engineering, logistics/haulage and financial and professional services.
Links to Key Economic Clusters	Includes Miller Court, which offers larger offices accommodating Financial Services and Professional and Business Services businesses. Also includes some Advances Manufacturing firms although these are generally a minority.
Percentage Occupied	95
Size, ha	75.2
Building Age	2000s-2010s
Building Quality	Good to average
Area Constraints	• The north and west of the Area is in Flood Zones 2/3 associated with Carrant Brook • Parts of the site are at risk from surface water flooding • Housing adjacent • Trees onsite
Opportunities for Expansion/Regeneration	Includes one small expansion site of 0.40 ha located in the south side of Tewkesbury Business Park, west of Travelodge and north of Porsche. This is considered further as an Employment Site for Tewkesbury.
Other Information	-
Recommendation	Large scale, active employment area, part of a wider cluster around Tewkesbury and Junction 9, M5. The area should be protected in the SLP for E(g)/B-Class uses.
Grading	B

Name (Address)	**Ashchurch Business Park (Tewkesbury)**
Reference	T1.10 (EMP1)
Description	Major industrial area, accommodating large scale production facilities for Moog in the south and east, plus a large warehouse unit, with a mix of smaller mostly industrial units in the west. Forms part of a larger business cluster in Tewkesbury, around Junction 9, M5.
Key Occupier(s)	Moog Aircraft Group, IDEMIA, Bensons for Beds, DXC Technology
Dominant Uses/Business Sectors	Advanced Manufacturing, logistics, trade, engineering
Links to Key Economic Clusters	Includes one large Advanced Manufacturing business with others spread throughout the area.
Percentage Occupied	85
Size, ha	39.0
Building Age	Mixed
Building Quality	Average
Area Constraints	• Parts of the site are at risk from surface water flooding • Housing adjacent
Opportunities for Expansion/Regeneration	Area is fully developed and tightly bound by other uses.
Other Information	-
Recommendation	Large scale, active employment area, part of a wider cluster around Tewkesbury and Junction 9, M5. The area should be protected in the SLP for E(g)/B-Class uses.
Grading	B

Local Plan Policy EMP2 Rural Business Centres

Name (Address)	Homedowns Achievement Park (Homedowns Farm, Ashchurch Rural)
Reference	T2.1 (EMP2)
Description	A rural site surround by fields to the south, west and east, it consists of four low grade units and has constrained access via rural roads.
Key Occupier(s)	GW Ceramics, W M Motors, Quarry Clothing Co.
Dominant Uses/Business Sectors	Manufacturing, trade, motor repair
Links to Key Economic Clusters	No strong links to Key Sectors
Percentage Occupied	100
Size, ha	1.20
Building Age	1945-1990
Building Quality	Poor/Average
Area Constraints	• Parts of the site are at risk from surface water flooding • Trees onsite • Constrained access
Opportunities for Expansion/Regeneration	There is modest internal expansion space in the south of the existing area.
Other Information	-
Recommendation	Low grade employment area but does continue to serve a purpose accommodating a small group of local businesses. The area should be protected in the SLP for E(g)/B-Class uses.
Grading	D

Name (Address)	Newton Farm Business Park (Ashchurch Rural)
Reference	T2.2 (EMP2)
Description	Small industrial estate comprising a converted and expanded farm, offering a number of average quality buildings and yards, prominently located off the A46, cluse to the other large Employment Areas of Tewkesbury.
Key Occupier(s)	Perfect Fabrications, Flowmix, Glenearn Plant Hire
Dominant Uses/Business Sectors	Engineering, construction
Links to Key Economic Clusters	No strong links to Key Sectors
Percentage Occupied	100
Size, ha	1.70
Building Age	Pre-1945
Building Quality	Average
Area Constraints	• Parts of the site are at risk from surface water flooding
Opportunities for Expansion/Regeneration	The Area boundary includes at least part of a field to the south, of 0.77 ha at the junction of Loverose Way and Platinum Drive, which could allow some growth.
Other Information	-
Recommendation	Small but active local employment area, particularly providing yards for some construction businesses which might struggle to find accommodation elsewhere. The area should be protected in the SLP for E(g)/B-Class uses.
Grading	C

Name (Address)	Homelands Farm (Bishops Cleeve)
Reference	T2.3 (EMP2)
Description	Active farm on the northern edge of Bishops Cleeve, adjacent to housing, off Cleeve Road. The site does not appear to accommodate any additional businesses, however.
Key Occupier(s)	-
Dominant Uses/Business Sectors	-
Links to Key Economic Clusters	-
Percentage Occupied	-
Size, ha	1.47
Building Age	Pre 1945
Building Quality	Poor
Area Constraints	• Parts of the site are at risk from surface water flooding • Trees onsite • Farm adjacent.
Opportunities for Expansion/Regeneration	An Outline planning application for a small scale 'green' commercial/ business park of up to 4,025 sqm was refused in 2012 due to being outside of the settlement boundary and lacking some information on highways impacts (App. No. 11/00663/OUT). Since the previous application was refused there has been no further attempt to develop E(g)/B-Class uses.
Other Information	-
Recommendation	While there may be some commercial activity with the farm buildings, there is no evidence that the Area functions as a formal business park or industrial estate. It should therefore not be protected for E(g)/B-class uses in the SLP.
Grading	E

Name (Address)	Highfield Farm (Elmstone Hardwicke)
Reference	T2.4 (EMP2)
Description	Small rural business park of some 40 workshops and smaller average quality industrial units, prominently located on the A38.
Key Occupier(s)	Red Earth Systems, New Leaf Upholstery and Design, Bankside Tackle, PB Safety
Dominant Uses/Business Sectors	Motor Repair, Manufacturing, Trade, Healthcare, Construction
Links to Key Economic Clusters	Occupancy in the existing Business Park is mixed but does include some Advanced Manufacturing businesses including Red Earth Systems (Aerospace), benefiting from strong A38 access.
Percentage Occupied	100
Size, ha	5.15
Building Age	1990-2010
Building Quality	Average
Area Constraints	• Parts of the site are at risk from surface water flooding • Trees onsite
Opportunities for Expansion/Regeneration	Identified expansion site to the south which is consented for a B2 unit of 2,045 sqm in the south east with additional premises proposed, in outline to the north and west which could total some 2,430sqm. The developable site area is identified as 2.89 ha. This is considered further as an Employment Site for Tewkesbury.
Other Information	-
Recommendation	Active local industrial estate, accommodating some high value uses and with plans for growth. The area should be protected in the SLP for E(g)/B-Class uses.
Grading	C

Name (Address)	Knightsbridge Business Centre (The Leigh)
Reference	T2.5 (EMP2)
Description	A rural farm conversion comprising five terraced industrial/warehouse units to the rear of a farm, in a rural area close to the A4019 Knightsbridge Road east of Coombe Hill.
Key Occupier(s)	44 Music, Drive 90, Silicone Moulds
Dominant Uses/Business Sectors	Engineering, Construction, Trade, Light Fabrication
Links to Key Economic Clusters	Supports a diverse range of rural businesses but does not have strong links to Key Sectors
Percentage Occupied	100
Size, ha	1.57
Building Age	1945-1990
Building Quality	Average
Area Constraints	• Most of the site is in Flood Zones 2/3 • Parts of the site are at risk from surface water flooding • Trees onsite • Farm adjacent
Opportunities for Expansion/Regeneration	Further expansion would require incursion into the surrounding countryside and areas of high Flood Risk.
Other Information	-
Recommendation	Active rural industrial estate. It should be protected for E(g)/B-class uses in the SLP.
Grading	C

Name (Address)	Park Farm Industrial Estate (Gretton)
Reference	T2.6 (EMP2)
Description	Small modern rural industrial estate, distant from settlements, that has seen recent small scale growth.
Key Occupier(s)	AerobatX, The Tile Barn, Fosse Fires, TDRPC (Shooting Range)
Dominant Uses/Business Sectors	Trade, Retail/Leisure
Links to Key Economic Clusters	Limited links to Key Sectors
Percentage Occupied	90
Size, ha	1.40
Building Age	2010+
Building Quality	Average
Area Constraints	• Parts of the site are at risk from surface water flooding • Houses adjacent
Opportunities for Expansion/Regeneration	Area has 1.35 ha of expansion land associated with it which is consented for 550 sqm of industrial/storage workspace. This is considered further as an Employment Site for Tewkesbury.
Other Information	-
Recommendation	Small site, focused on trade and retail but is a useful source of smaller workspace in a rural area and which is seeing ongoing growth. It should be protected for E(g)/B-class uses in the SLP.
Grading	C

Name (Address)	**Highnam Business Centre (Highnam)**
Reference	T2.7 (EMP2)
Description	Rural business park, offering smaller modern offices at a road junction outside of Highnam
Key Occupier(s)	Hexagon Software Group, Farr Physiotherapy, Orchard View Vets, Nails & Beauty by Natasha B
Dominant Uses/Business Sectors	Health, Digital, Professional Services
Links to Key Economic Clusters	Within a broader mix of services the Area accommodates some smaller Digital and Technologies companies.
Percentage Occupied	100
Size, ha	3.20
Building Age	1990-2010
Building Quality	Average
Area Constraints	• Parts of the site are at risk from surface water flooding • Area includes Listed Buildings • Housing adjacent
Opportunities for Expansion/Regeneration	Further expansion would require incursion into the surrounding countryside.
Other Information	-
Recommendation	Active rural business park and particularly a key source of offices which are rarely found outside of the Gloucester and Cheltenham settlement areas. It should be protected for E(g)/B-class uses in the SLP.
Grading	C

Name (Address)	**The Steadings (Maisemore)**
Reference	T2.8 (EMP2)
Description	High quality modern terraced offices in a dense rural business park, linked to a farm and wedding venue, access by narrow rural roads off the A417.
Key Occupier(s)	iLex Accountancy Services, Onward Agency, Ewatt Technology, Bexmedia
Dominant Uses/Business Sectors	Media, Financial Services, Mixed Professional Services
Links to Key Economic Clusters	A diverse cluster of Creative Industries, Professional and Business Services and Financial Services businesses, including start-ups.
Percentage Occupied	100
Size, ha	0.90
Building Age	Mixed
Building Quality	Good
Area Constraints	• Parts of the site are at risk from surface water flooding • Area includes Listed Buildings • Housing adjacent
Opportunities for Expansion/Regeneration	Further expansion would require incursion into the surrounding countryside.
Other Information	-
Recommendation	Active rural business park and particularly a key source of offices which are rarely found outside of the Gloucester and Cheltenham settlement areas. It should be protected for E(g)/B-class uses in the SLP.
Grading	C

Name (Address)	Orchard Industrial Estate (Toddington)
Reference	T2.9 (EMP2)
Description	Small rural industrial estate, providing average quality small and mid-sized industrial and warehouse units at a main road junction.
Key Occupier(s)	Evesham Specialist Packaging, Obelix Systems, QCR Recycling Equipment, Travellers Finds inc. African Creations
Dominant Uses/Business Sectors	Waste Management, Packaging, Storage, Trade/Retail, Construction
Links to Key Economic Clusters	A diverse group of local businesses but with limited links to Key Sectors.
Percentage Occupied	90
Size, ha	6.9
Building Age	Mixed
Building Quality	Average
Area Constraints	• Parts of the site are at risk from surface water flooding
Opportunities for Expansion/Regeneration	The triangular area of land to the south west, at the B4077/B4078 (3.81 ha) has a Hybrid Planning consent for: C) Full planning application for the erection of an industrial building of 8,625 sqm (GEA) D) Outline application for phase two for an industrial building providing up to 4,590 sqm (GEA) (App. No. 22/00968/FUL). The proposed space will allow the expansion of Bushell and Meadows which manufactures precision engineering products for the medical markets. It is considered further as an Employment Site.
Other Information	-
Recommendation	Active local industrial estate. It should be protected for E(g)/B-class uses in the SLP. 3.81 ha to the south west now has consent for a large development for an Advanced Manufacturing company. This land should be included within the Employment Area.
Grading	C

Name (Address)	Twigworth Court (Twigworth)
Reference	T2.10 (EMP2)
Description	Historic brick built former farm buildings providing good quality offices and workshops in a tightly defined site on the edge of a settlement area.
Key Occupier(s)	The Cotswold Sewing School, Cheltenham Equine Vets, Kestrel Dental Studio, In Touch Therapies
Dominant Uses/Business Sectors	Retail, Trade, Healthcare
Links to Key Economic Clusters	Primarily accommodates retail/wholesale and service businesses with limited links to the Key Sectors
Percentage Occupied	100
Size, ha	1.50
Building Age	Pre-1945
Building Quality	Good
Area Constraints	• Housing adjacent • Northern areas are in Flood Zone 2 • Parts of the site are at risk from surface water flooding • Includes a Listed Building
Opportunities for Expansion/Regeneration	There are plots of land within Twigworth Court which can be developed for extra buildings/units.
Other Information	-
Recommendation	Buildings are mostly in retail/service use but still provide a useful source of modern offices and workshops which can meet a wide range of needs, especially for start-ups and micro firms. It should be protected for E(g)/B-class uses in the SLP.
Grading	C

Name (Address)	Brockeridge Farm Business Centre (Twyning)
Reference	T2.11 (EMP2)
Description	Modern, low density rural office park offering 16 smaller, single storey offices in a courtyard development close to Junction 1, M50.
Key Occupier(s)	Delacour Maclaren, CSA Environmental, BM Aluminium, Mercian Group, Ruby Financial
Dominant Uses/Business Sectors	Financial Services, Professions Services (Waste and Environmental Focus)
Links to Key Economic Clusters	Key cluster of Financial Services and Professional and Business services companies, including administrative facilities for a number of larger engineering, waste and environmental companies.
Percentage Occupied	100
Size, ha	4.50
Building Age	Mixed
Building Quality	Average
Area Constraints	• Listed Building adjacent • Housing adjacent • Parts of the site are at risk from surface water flooding
Opportunities for Expansion/Regeneration	Multiple consents in and around the area, including an Outline application for the extension of Brockeridge Business Park to provide for up to 33,329 sqm of B8, approved at appeal in June 2026 (App. No. 21/01498/OUT). Previous consented applications include: • Outline planning application for construction of 4,533 sqm of E(g)/B-Class development on 2.49 ha to the east of the existing Business Centre (App. No. 18/00368/OUT) • Construction of 834 sqm of business space (Class E) on land between the business centre and the pond. Reserved Matters consent, building on the above Outline consent (App. No. 21/00057/APP). These are considered further in the Employment Sites analysis.
Other Information	-
Recommendation	The Business Centre is distant from the main settlements of the SLP Area. However, it still provides a high value cluster of offices in a prominent position on the strategic road network, serving a broader economy. It should be protected for E(g)/B-class uses in the SLP. With the most recent consents, the area will expand considerably to include B8 logistics uses and these allocated areas should also be recognised in the SLP.
Grading	B

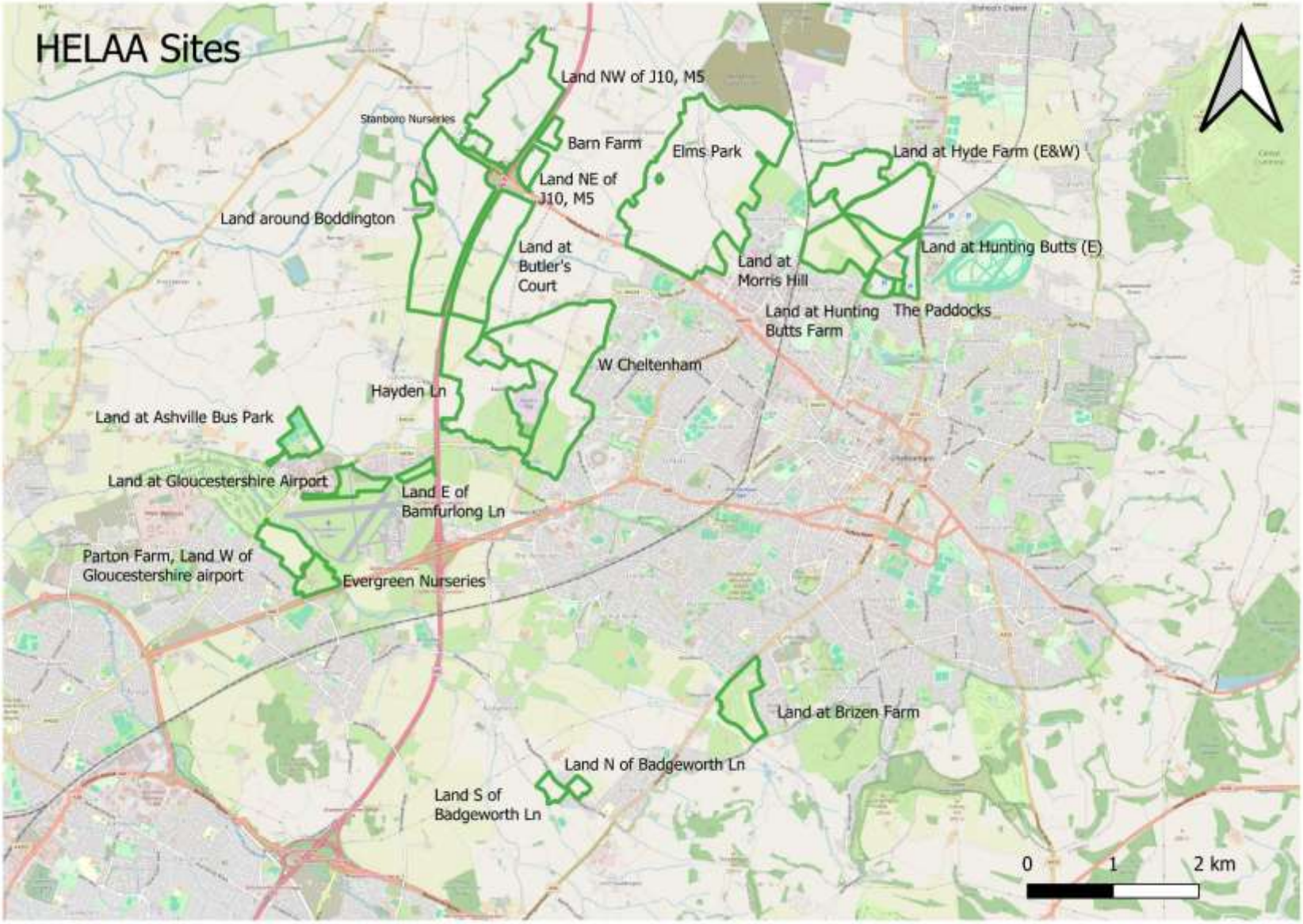
Name (Address)	Duddage Manor Business Park (Twyning)
Reference	T2.12 (EMP2)
Description	Group of ten modern terraced industrial units in a rural site, to the rear of housing and close to Junction 1, M50.
Key Occupier(s)	Cool Concerns Aquamarine Chemicals
Dominant Uses/Business Sectors	Chemicals production, mixed manufacturing and engineering, training
Links to Key Economic Clusters	Comprises a modest range of manufacturing businesses, but most would not be considered Advanced Manufacturing.
Percentage Occupied	100
Size, ha	1.00
Building Age	1990-2010
Building Quality	Average
Area Constraints	• Housing adjacent • Parts of the site are at risk from surface water flooding • Public Right of Way bounds the area in the west. • Trees onsite
Opportunities for Expansion/Regeneration	The site has Outline consent for E(g), B2, B8 premises comprising six larger units and six smaller units (Application No. 21/01384/OUT), totalling 3,000 sqm on 1.13 ha west of the existing Business Park
Other Information	-
Recommendation	Active and accessible local industrial estate, with growth potential. Both the Area and the consented land should be protected for E(g)/B-class uses in the SLP.
Grading	C

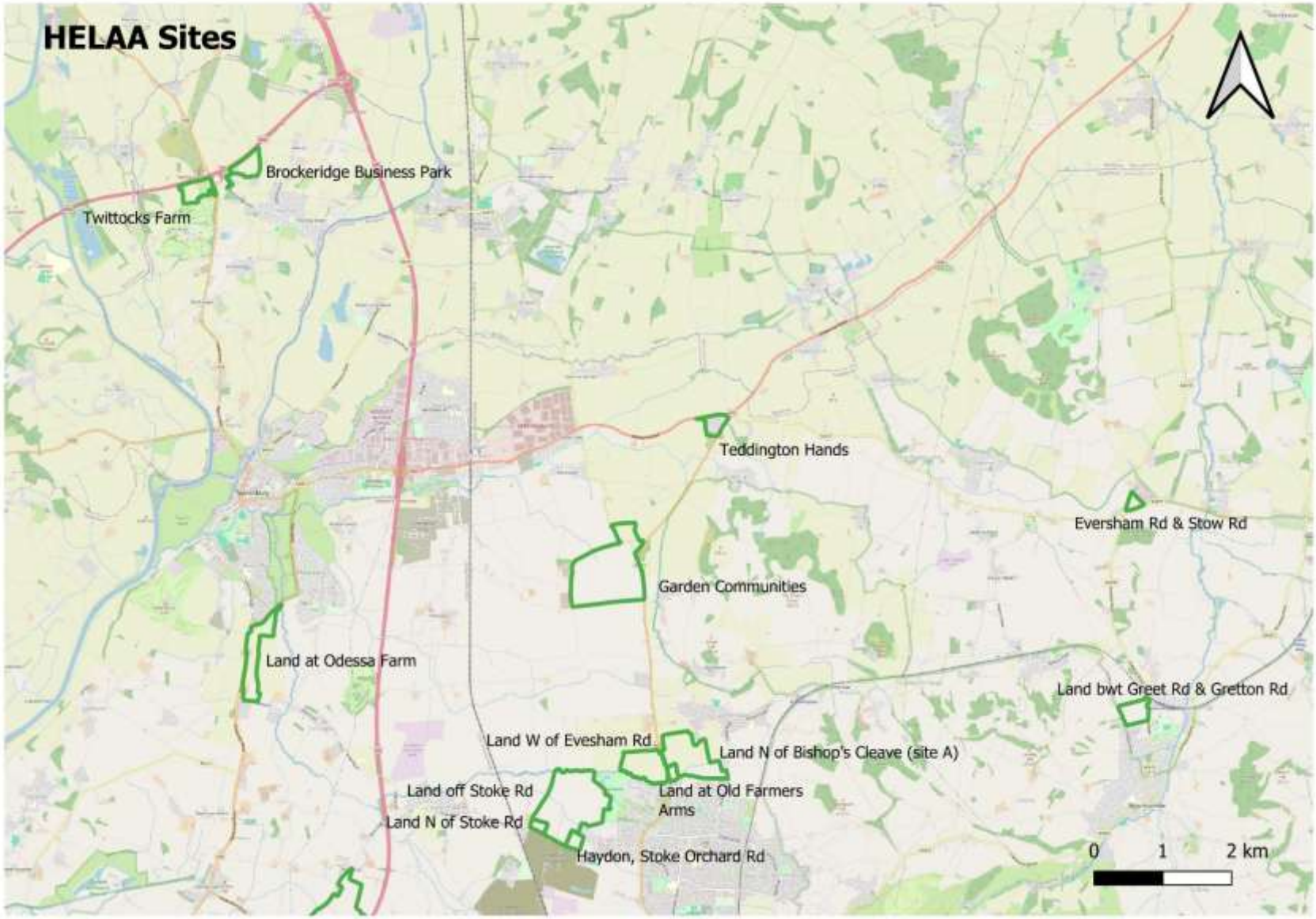
Name (Address)	Isbourne Business Park (Winchcombe)
Reference	T2.13 (EMP2)
Description	Small, older industrial estate mostly comprising smaller terraced units, in a rural edge of settlement location.
Key Occupier(s)	Rapport interiors, Glosfume, Geoff Cotswold Brewery
Dominant Uses/Business Sectors	Manufacturing (filtration systems), food production, trade, construction
Links to Key Economic Clusters	Includes at least one company which could be described as being in Advanced Manufacturing (Glosfume). Other companies are mostly in construction, trade and food production.
Percentage Occupied	100
Size, ha	1.47
Building Age	1990-2010
Building Quality	Average
Area Constraints	• In Flood Zones 2/3 • Parts of the site are at risk from surface water flooding • Public Right of Way bounds the area in the west. • Trees onsite
Opportunities for Expansion/Regeneration	Fully developed. Tightly bound by other uses, including woodland.
Other Information	-
Recommendation	Active local industrial estate. It should be protected for E(g)/B-class uses in the SLP.
Grading	C

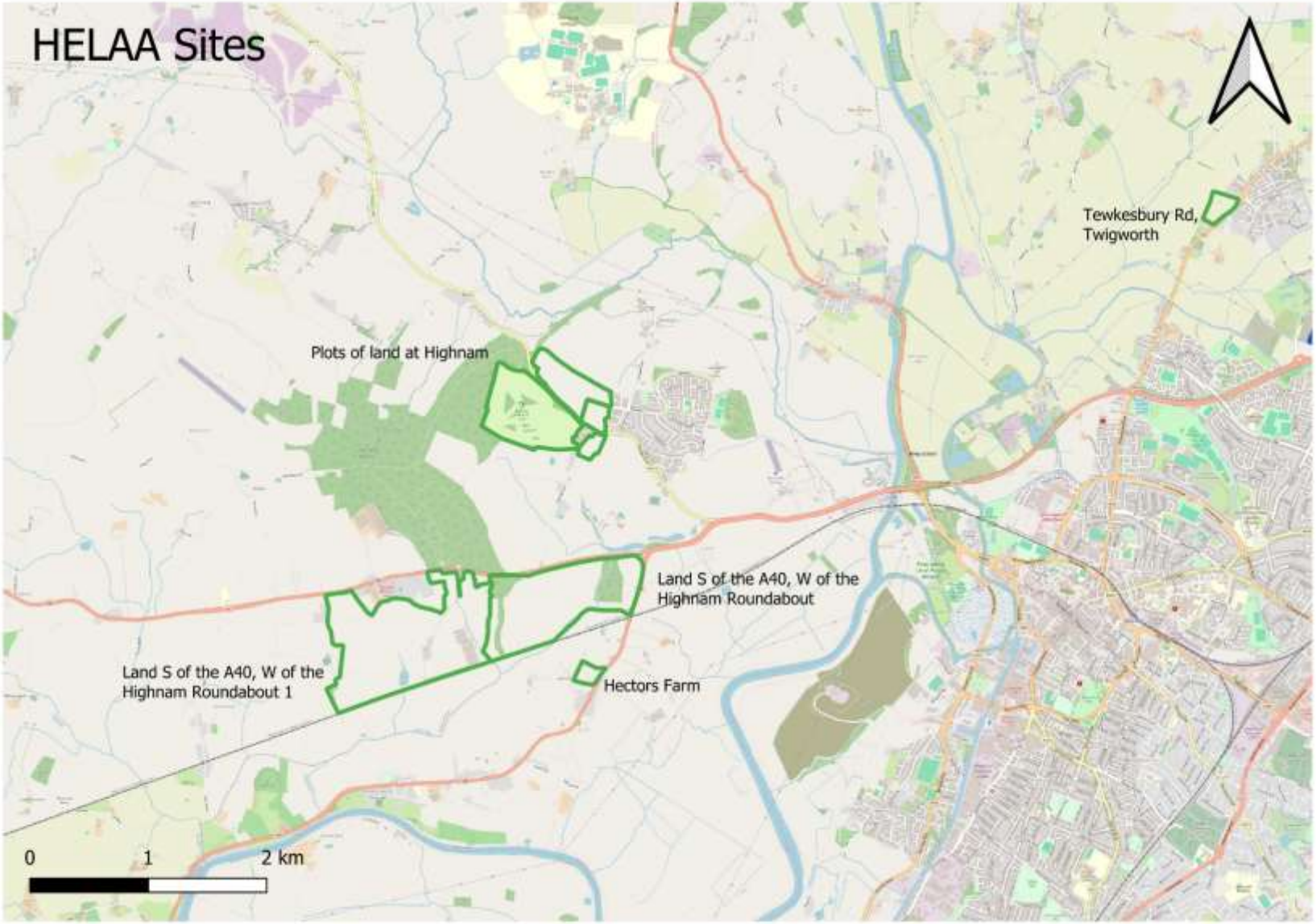
Name (Address)	**Withytrees Farm (Winchcombe)**
Reference	T2.14 (EMP2)
Description	Several rows of average quality workshops in converted farm buildings, in a rural site.
Key Occupier(s)	Saxon Print, Embroidery and Design, Digital Scales Company
Dominant Uses/Business Sectors	Trade, Retail and Printing
Links to Key Economic Clusters	Limited linkages to Key Sectors
Percentage Occupied	100
Size, ha	1.21
Building Age	2010+
Building Quality	Average
Area Constraints	• In Area of Outstanding Natural Beauty • Parts of the site are at risk from surface water flooding • Public Right of Way passes through the site.
Opportunities for Expansion/Regeneration	Site is subject to an existing planning consent for refurbishment and partial redevelopment (App. No.11/00545/FUL) which has been at least partially implemented. 0.41 ha remains. This is considered further in the Employment sites analysis.
Other Information	-
Recommendation	Active local industrial estate. It should be protected for E(g)/B-class uses in the SLP.
Grading	C

Appendix 13

HELAA Site Maps


HELAA Sites
Land NW of J10, M5
Stanboro Nurseries
Barn Farm
Elms Park
Land at Hyde Farm (E&W)
Land NE of J10, M5
Land around Boddington
Land at Butler's Court
Land at Morris Hill
Land at Hunting Butts (E)
Land at Hunting Butts Farm
The Paddocks
W Cheltenham
Hayden Ln
Land at Ashville Bus Park
Land at Gloucestershire Airport
Land E of Bamfurlong Ln
Parton Farm, Land W of Gloucestershire airport
Evergreen Nurseries
Land at Brizen Farm
Land N of Badgeworth Ln
Land S of Badgeworth Ln
0
1
2 km


HELAA Sites
Brockeridge Business Park
Twittocks Farm
Teddington Hands
Eversham Rd & Stow Rd
Garden Communities
Land at Odessa Farm
Land bwt Greet Rd & Gretton Rd
Land W of Evesham Rd
Land N of Bishop's Cleave (site A)
Land off Stoke Rd
Land at Old Farmers Arms
Land N of Stoke Rd
Haydon, Stoke Orchard Rd
0
1
2 km


HELAA Sites
Tewkesbury Rd, Twigworth
Plots of land at Highnam
Land S of the A40, W of the Highnam Roundabout
Land S of the A40, W of the Highnam Roundabout 1
Hectors Farm
0
1
2 km