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Coventry & Warwickshire HEDNA – WMSESS Alignment Paper

Final Report

Iceni Projects Limited on behalf of
Rugby Borough Council

September 2024

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LIMITED ON BEHALF
OF RUGBY BOROUGH
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1. Introduction

- 1.1 Icen Projects Ltd has been commissioned by Rugby Borough Council on behalf of the Coventry and Warwickshire (C&W) local planning authorities (Rugby, Coventry, North Warwickshire, Nuneaton & Bedworth, Warwick and Stratford-on-Avon) to consider the relationship between employment land need recommendations in the West Midlands Strategic Employment Sites Study (WMSESS) 2023/24 and the Coventry and Warwickshire Housing and Economic Development Needs Assessment (C&W HEDNA) 2022.
- 1.2 The modelling within the C&W HEDNA provides a consistent evidence base across the sub-region on the need for housing and employment. At the time the Study was undertaken, the previous iterations of the WMSESS did not include any quantification of strategic employment land needs. The HEDNA therefore included consideration of both local needs and those for strategic B8 development (units > 9,000 sq.m). The HEDNA does not consider supply-side factors.
- 1.3 The WMSESS covers a different geography - a much wider study area – and considers need at this regional scale, before moving on to consider existing supply and spatial distribution issues. Within this Alignment Paper, the strategic needs of the WMSESS are given primacy, given its pan-regional coverage and incorporation of out of area effects; the overlap between large manufacturing requirements and strategic site requirements; and the more detailed work and consideration which has been given to both need-based factors and potential opportunity areas where new sites could be brought forwards.
- 1.4 This Alignment Paper is necessary to bring together the WMSESS and the C&W HEDNA, address the overlaps between them, and provide aligned outputs on employment land needs over a consistent set of timescales.

1.5 In particular this report therefore considers key issues of:

- Aggregated and disaggregated needs for C&W and the individual LPAs.
- Reconciling different assessment periods (HEDNA 2021-41/50 and WMSESS 2022-45).
- Inclusion of most recent commitments and completions to provide and up-to-date gross needs position and net need (supply / demand balance) taking account of completions to date and extant commitments and allocations.
- The role of strategic sites (large scale employment sites typically over 25 ha and largely dedicated to units of over 9,000 sqm) vs non strategic sites, including where strategic units may be located on non-strategic sites.
- Strategic units, including the potential supply for both B2 and B8, given that the HEDNA primarily considered the role of large B8 units only but the market and sites typically consider both.

1.6 Recommendations are provided which update the C&W HEDNA in terms of local and strategic site requirements for the authorities. In doing so, Iceni has taken the opportunity to provide a consistent updated position which takes account of more recent completions data, given that the C&W HEDNA had consistent data only to 2019.

2. Context – Relevant Studies

2.1 At the time of writing (August 2024) the WMSESS is unpublished. At this time the WMSESS is not therefore summarised in this section. This report is intended however to be published alongside the WMSESS and should be read alongside it.

Coventry and Warwickshire Housing and Economic Development Needs Assessment (HEDNA) 2022

2.2 The HEDNA considered the need for employment land across Coventry and Warwickshire looking from 2021 to 2041 and 2050 (reflecting the different time periods for local plans under preparation in the sub-region).

2.3 The table below summarises the recommendations made in regard to future employment land needs. These draw on:

- labour demand modelling for office needs;
- gross completions trends for industrial and warehousing;
- include a margin; and
- for strategic B8 future development requirements are in line with recent completions trends over the initial 10 year period (2021-31), with the subsequent decade then seeing potentially slower growth in line with the MDS Transmodal traffic growth and replacement demand modelling.

2.4 The resultant need shown was for 37.7 ha of office development to 2041 (and 49.4 ha to 2050); with a need for 621.9 ha for general industrial to 2041 (rising to 901.8 ha to 2050). In addition a need was identified for strategic B8 development for 551 ha to 2041 across C&W (rising to 735 ha to 2050). In each case this included a margin to provide supply flexibility.

Table 2.1 C&W Employment Land Needs 2021-41 ha

	Office	General Industrial	Sub-Total	Strategic B8
N. Warwickshire	5.3	56.1	61.4	
N. and Bedworth	2.2	45.5	47.7	
Rugby	5.2	150.5	155.7	
Stratford-on-Avon	5.2	166.1	171.3	
Warwick	11.4	56.2	67.6	
Coventry	8.5	147.6	156.1	
Total	37.7	621.9	659.6	551

Source: Icen Projects, C&W HEDNA 2022

Table 2.2 C&W Employment Land Needs 2021-50 ha

	Office	General Industrial	Sub-Total	Strategic B8
N. Warwickshire	7.0	81.4	88.4	
N. and Bedworth	3.0	66.0	69.0	
Rugby	6.5	218.2	224.7	
Stratford-on-Avon	7.2	240.9	248.1	
Warwick	15.8	81.4	97.2	
Coventry	10.0	214.0	224.0	
Total	49.4	901.8	951.3	735

Source: Icen Projects, C&W HEDNA 2022

West Midlands Strategic Employment Sites Study 2023/24

- 2.5 This Study determines the level of need for strategic employment sites for both logistics and manufacturing activities up to 2045. It quantifies the need for additional strategic employment sites taking account of the existing pipeline of supply, and identifies areas of opportunity for additional strategic sites within defined opportunity areas.
- 2.6 The table below summarises the supply-demand balance. Adjustments to the forested need have been made to reflect brownfield recycling opportunities, the presence of small units on strategic sites and the need for big box units on non-strategic sites.

2.7 Overall, there is a road-based strategic sites need of 1,555-1,848ha and a rail need of 365-433ha indicating the need for a SFRI within the plan period. Taking account of existing commitments (as of April 2022) there is a residual need of 615-977ha across the West Midlands.

Table 2.3 WMSESS Supply-Demand Balance Summary (Ha)

	MDST	Completions
Forecasted Need 2022-45 with adjustments and margin	3,354*	3,080
Strategic sites adjustment (-25%**)	2,516	2,310
Brownfield recycling adjustment***	2,282	1,920
Adjusted Road Need****	1,848	1,555
Adjusted Rail Need****	433	365
Commitments ³	1,305	
Road Shortfall	841	548
Rail Shortfall	135	67
Shortfall (Ha)	977	615

Source: Icen Projects

*includes -20% recycling adjustment

**downwards adjustment of 35% for strategic units not on strategic sites and upwards 10% adjustment to allow for small units on strategic sites.

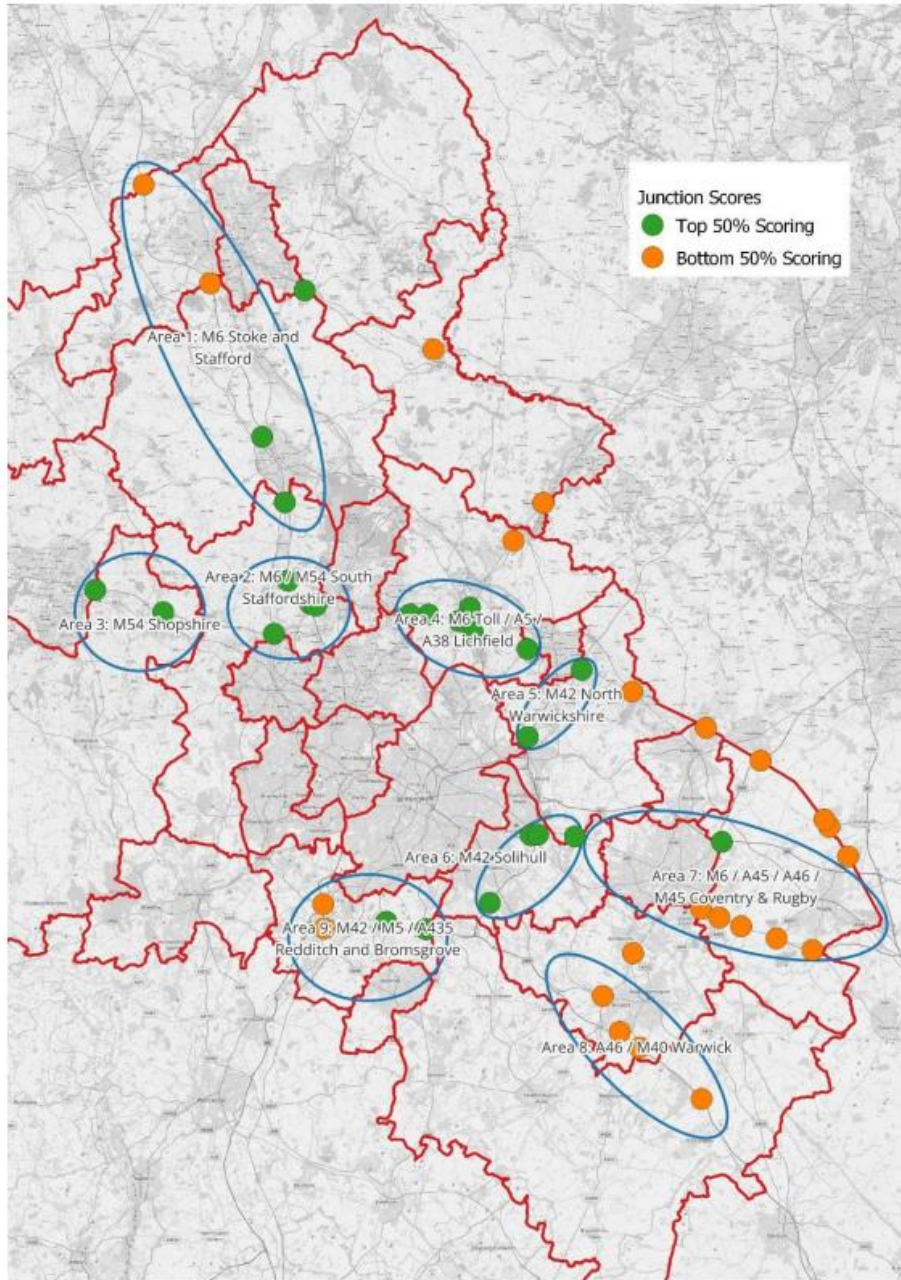
Source: WMSESS 2023/24

2.8 The Study then goes on to identify opportunity areas where new strategic employment sites should be considered. The figure below shows the 9 areas of opportunity identified through a capacity testing process with the green and orange dots representing the top 50% scoring and bottom 50% scoring junctions.

2.9 Three areas of opportunity fall within the Coventry & Warwickshire study area, these include:

- Area 5 - M42 - North Warwickshire
- Area 7: M6 / A45 / A46 / M45 - Coventry, Rugby, Nuneaton and Warwick
- Area 8: A46 / M40 - Warwick and Stratford-on-Avon

Figure 2.1 Opportunity Areas identified in WMSESS



2.10 Each opportunity area was apportioned a proportion of the residual strategic sites need based on a high level exercise balancing current commitments against past take-up rates, market attributes and other considerations. The apportioned need is summarised in the table below. The full indicative site distribution table can be found in Appendix A2.

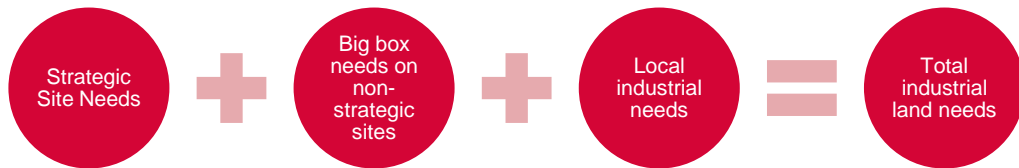
Table 2.4 WMSESS Recommendations regarding additional Strategic Site Provision

Opportunity Area	Type of Site	Indicative additional strategic site requirement at B8/mixed c.50ha - B1/B2 dedicated c.25ha	Indicative land need 2022-45
Area 5: M42 North Warwickshire	B8/Mixed	1-2	50-100
	B2	0	0
Area 7: M6 / A45 / A46 / M45 Coventry & Rugby	B8/Mixed	1-2	50-100
	B2	1-2	25-50
Area 8: A46 / M40 Warwick & Stratford	B8/Mixed	1-2	50-100
	B2	1	25
Total			200 - 375

2.11 The recommendations on the need for additional strategic employment sites take account of the pipeline position shown in Appendix A1 herein. Further details on the recommendations regarding each of the Opportunity Areas are replicated in Appendix A2 herein.

3. Industrial Needs Position

3.1 There are three components to the industrial needs which are considered in this section. These are summarised in the diagram below.



Strategic Sites Need

3.2 As summarised above, the WMSESS addresses the need for 'strategic sites' which it defined as sites of greater than 25ha in area, rather than needs for employment units of a strategic scale (units of over 9,000sq.m in floor area). It identified 3 areas of opportunity for strategic sites that fall within/ relate principally to Coventry and Warwickshire (see Figure 2.1) these are:

- Area 5: M42 North Warwickshire
- Area 7: M6 / A45 / A46 / M45 Coventry & Rugby
- Area 8: A46 / M40 Warwick & Stratford-on-Avon

3.3 Based on market ranking, pipeline supply and other factors the **residual need** for additional strategic sites was apportioned between opportunity areas across the West Midlands study area. The indicative need for the three opportunity areas within Coventry & Warwickshire is shown in the table below. Based on site need recommendations, **there is a need for between 200-375ha of land on additional new strategic sites across the Coventry & Warwickshire sub-region.**

Table 3.1 WMSESS Indicative Site Need – C&W Opportunity Areas

Opportunity Area	Type of Site	Indicative additional strategic site requirement at B8/mixed c.50ha - B1/B2 dedicated c.25ha	Indicative land need 2022-45
Area 5: M42 North Warwickshire	B8/Mixed	1-2	50-100
	B2	0	0
Area 7: M6 / A45 / A46 / M45 Coventry & Rugby	B8/Mixed	1-2	50-100
	B2	1-2	25-50
Area 8: A46 / M40 Warwick	B8/Mixed	1-2	50-100
	B2	1	25
Total			200 - 375

Source: Icen Analysis of WMSESS 2024

3.4 In order to align the WMSESS strategic sites need with the Coventry & Warwickshire HEDNA base date of 2021, the residual 2022-45 need has been pro-rated back one year. As the start year is 2021, the 2021/22 strategic site completions in Coventry & Warwickshire have been subtracted to provide a residual strategic sites need for the 2021-45 period. This is equal to **177-359ha.**

Table 3.2 Calculating the Strategic Sites Need for C&W 2021-45

	Ha
WMSESS Strategic Sites Need (2022-45)	200 – 375
Avg Need per Annum	7.4 – 13.9
Pro-rata Need (2021-45)	207 – 389
Supply (2021/22 completions)	30*
Total Residual Strategic Sites Need 2021-45	177 - 359

* Coventry, Whitley Way Business Park - Puma Park; North Warwickshire - St Modwen, Tamworth Logistics Park

- 3.5 The WMSESS figures for C&W are a residual (net) need figure, therefore to calculate a gross need, the netted off commitments and allocations in Coventry & Warwickshire need to be added back on to produce an overall (gross) strategic sites need figure.
- 3.6 Of the 1,305ha of commitments netted off from the overall WMSESS strategic site needs figure, **656ha** are within Coventry & Warwickshire (see Appendix 1). Therefore the overall (gross) need for strategic sites is **833 – 1,015ha**.

Table 3.3 Calculation of Gross Need Strategic Sites Need for C&W – 2021-45

	Ha
Total Residual Strategic Sites Need 2021-45	177 - 359
C&W Strategic Site Commitments	656
Total Strategic Sites Need	833 – 1,015

Local Industrial Need

- 3.7 This section forecasts the 'local' industrial need, which includes all industrial uses (E(g)(iii), B2 and B8), for units smaller than 100,000 sq.ft (<9,000 sq.m). Local Authority monitoring data has been analysed to remove 'strategic' units of over 100,000 sq.ft from the trend.
- 3.8 The average gross completions trend used is for the 2011/12 - 2023/24 period (with the exception of Stratford-on-Avon which uses data up to 2022/23 due to unavailability of data). This compares to the 2022 HEDNA which used gross completions data for the 2011/12-2019/20 period.
- 3.9 This extended trend period is appropriate as it captures the impact of the Covid-19 pandemic and other drivers of stronger recent industrial take-up including the growth in e-commerce, increase stock holding requirements and need for modern floorspace with sufficient height and power. However in taking a 12 year average it recognises the cyclical nature of the property market and some 'one off' effects of the pandemic-induced market adjustment.
- 3.10 Table 3.4 projects forwards average gross completions to forecast future local industrial need. The need is projected across three periods and includes a margin equivalent to 5 years average gross completions. A 5 year margin is included as per the C&W HEDNA.
- 3.11 Table 3.5 converts employment floorspace need to employment land need in hectares, assuming a plot ratio of 0.4ha.
- 3.12 Overall in Coventry & Warwickshire, for industrial units smaller than 100,000 sq.ft, there is a need for 365ha in the 2021-41 period, 424ha for the 2021-45 and 497ha in the 2021-50 period.

Table 3.4 Local Industrial Needs Position (sq.m)– Including 5 year margin

	2021-41	2021-45	2021-50
Rugby	108,200	125,500	147,100
North Warwickshire	79,400	92,100	107,900
Nuneaton & Bedworth	146,700	170,200	199,500
Coventry	342,600	397,400	465,900
Stratford	498,800	578,600	678,300
Warwick	286,000	331,800	389,000
Total	1,461,700	1,695,600	1,987,700

Source: Icen Analysis of Local Authority Monitoring

Table 3.5 Local Industrial Needs Position (Ha) – Including 5 year margin

	2021-41	2021-45	2021-50
Rugby	27.0	31.4	36.8
North Warwickshire	19.8	23.0	27.0
Nuneaton & Bedworth	36.7	42.5	49.9
Coventry	85.6	99.3	116.5
Stratford	124.7	144.6	169.6
Warwick	71.5	82.9	97.3
Total	365	424	497

Source: Icen Analysis of Local Authority Monitoring

Big Box Need on Non-Strategic Sites

- 3.13 The WMSESS 2024 made a 25% discount to the need – this took into account that some smaller units would be located on strategic sites but also not all big box units go on strategic sites. Essentially the WMSESS considered strategic site needs, rather than big box needs.
- 3.14 There is therefore the need to estimate a ‘top-up’ need of big box (+9,000 sq.m) units that will not be located on strategic sites.
- 3.15 Icen Projects have analysed big box (+9,000 sq.m) gross completions across C&W for the 2011/12-2023/24 period to identify which are located on non-strategic sites. These are listed in the table below and

total to 244,606 sq.m of floorspace, an average of 20,384 sq.m (5.1ha) per annum.

Table 3.6 Big Box Completions on Non-Strategic Sites

Site	LA	Floorspace (sq.m)	Date Completed
Sertec, Coleshill	North Warwickshire	26,698	2014/15
Wellesbourne Distribution Park	Stratford-on-Avon	77,179	2017/18
Spa Park	Warwick	12,077	2020/21
DC South Torrington	Coventry	26,000	2021/22
Spa Park	Warwick	16,770	2022/23
Davies Turner, Atherstone	North Warwickshire	13,069	2023/24
Redevelopment of Toys R Us (Coventry Logistics Park)	Coventry	72,813	2023/24
Total		244,606	

Source: Icen Analysis of Local Authority Monitoring

- 3.16 Rolling the average completions trend forward (equivalent to 5.1ha per annum using a 0.4¹ plot ratio) over the plan period and including a margin equivalent to 5 years of gross completions, indicates a need (for non-strategic sites) for 127ha of land for big box development for 2021-41 period, 148ha for the 2021-45 period and 173ha for the 2021-50 period.

Table 3.7 Big Box Need on Non-Strategic Sites

Need	Floorspace (sq.m)	Land (Ha)
2021-41	407,677	102
+ 5 year margin	509,596	127
2021-45	489,212	122
+5 year margin	591,131	148

¹ Used 0.4 ratio not 0.35 as these are effectively brownfield units not requiring the scale of infrastructure associated with strategic sites

2021-50	591,131	148
+5 year margin	693,050	173

Source: Icen Analysis of Local Authority Monitoring Data

3.17 The need for big box units on non-strategic sites is then apportioned to local authorities based on their proportion of all industrial completions (local and big box).² The table below shows the proportion of gross completions by local authority and their apportioned non-strategic site big box need.

Table 3.8 Apportionment of Big Box (Non-Strategic Site Need)

Local Authority	% of all industrial gross completions	Apportionment of Local Big Box		
		2021-41	2021-45	2021-50
Rugby	25.5%	31.4	36.6	42.7
North Warwickshire	33.2%	40.5	47.2	55.1
Nuneaton & Bedworth	3.5%	4.5	5.3	6.2
Coventry	13.9%	19.3	22.5	26.3
Stratford	14.9%	19.5	22.7	26.6
Warwick	9.0%	11.8	13.7	16.0
Total	100%	127	148	173

Source: Icen Analysis of Local Authority Monitoring

3.18 The apportioned non-strategic big box need can then be combined with the local industrial need (<9,000 sq.m) (Table 3.5) to provide an overall industrial need for non-strategic sites for each local authority – totalling 467ha for the 2021-41 period and 636ha for the 2021-50 period.

3.19 The Coventry & Warwickshire need for strategic sites identified in WMSESS can be added on to the local industrial need totals to provide a Coventry & Warwickshire overall employment land need. This is

² Using big box only would result in a distribution which is too easily swayed by a limited number of units delivered.

equivalent to 1,325-1,507ha for the 2021-41, 1,405-1,587ha over the 2021-45 period and 1,503-1,685ha over the 2021-50 period.

Table 3.9 Total Industrial Need

	2021-41	2021-45	2021-50
Industrial Need Non-Strategic Sites			
Rugby	58.4	68.0	79.5
North Warwickshire	60.3	70.2	82.1
Nuneaton & Bedworth	41.2	47.8	56.1
Coventry	104.9	121.8	142.8
Stratford	144.2	167.3	196.2
Warwick	83.3	96.6	113.3
Total	492.0	572.0	670.0
Strategic Sites Need 2021-45	833 – 1,015		
Total C&W Industrial Employment Land Need	1,325-1,507	1,405-1,587	1,503-1,685

Source: Icen Projects analysis of Local authority Monitoring Data

NB: figures may not sum due to rounding

- 3.20 In drawing conclusions on employment land overall, it should be remembered that office development needs also need to be considered and added on to those above. Whilst not the focus of this report, these are replicated below (as drawn from the C&W HEDNA analysis).

Table 3.10 Office Development Needs

	2021-41	2021-50
Rugby	5.5	6.5
North Warwickshire	5.3	7.0
Nuneaton & Bedworth	2.2	3.0
Coventry	8.5	10.0
Stratford	5.2	7.2
Warwick	11.4	15.8
Total	38.1	49.5

Source: C&W HEDNA – NB figure totals updated from HEDNA

Comparison to the HEDNA 2022

- 3.21 The Coventry & Warwickshire HEDNA identified a need for 622ha of general industrial and 551ha for Strategic B8 up to 2041, totalling **1,173ha**. For the 2021-50 period this general industrial and Strategic B8 total need is **1,637ha**.
- 3.22 This aligns relatively closely with updated analysis. There is particularly strong alignment to 2050.
- 3.23 By removing big box units from the completions trend and using data up to 2023/24, the general local industrial need overall has been reduced and the balance of need has shifted towards strategic sites which are assumed to support the bulk of demand for both larger B2 and B8 units. The previous HEDNA estimated the need for Strategic B8 (all big box units) whereas WMSESS forecasts the need for both strategic B2 and B8 and focuses on sites rather than units.
- 3.24 Overall the updated industrial and strategic sites needs position produces an overall employment land need that is broadly in line with the Coventry & Warwickshire total need identified in the HEDNA.

4. Industrial Supply and Demand Balance

- 4.1 The residual industrial needs position is derived by subtracting completions for the 2021/22-2023/23 period, extant permissions and existing allocations.

Local Need/ Non-Strategic Sites

- 4.2 The table below shows a breakdown of local industrial land supply by local authority, including gross completions 2021-22, 2022/23 and 2023/24, committed industrial development³ and extant allocations.
- 4.3 This section is provided in hectares given the unknown floorspace quantum allocations will contribute. Completions and commitments have been converted to hectares assuming a plot ratio of 0.4.
- 4.4 Where allocations are earmarked for mixed employment (E(g)/B2/B8) the whole allocation has been included, despite the potential to accommodate some office floorspace, in order to develop a broad demand-supply balance picture.

³ This is a gross figure and does not take account of any planned losses. It is not within the scope of this study to consider the impact planned losses and to what extent they should be replaced.

Table 4.1 Gross Supply on Non-Strategic Industrial/ Mixed Employment Sites (Ha)

	Completi ons 2021/22- 23/24	Commit- ments	Allocations	Total
Rugby	1.7	3.5	0	5
North Warwickshire	3.7	23.6	6.6	34
Nuneaton & Bedworth	7.6	44	0	52
Coventry	25.4	6.2	28.6	60
Stratford*	2.1	7.6	46.3	56
Warwick	8.2	8.5	19.8	37
Total				244

*missing 2023/24 completions

Source: Icen Analysis of Local Authority Monitoring

- 4.5 Netting off the above supply from the identified local industrial demand provides the following residual industrial need. The 2021-41 and 2021-50 residual industrial need is presented in the tables below. All local authorities, with the exception of Nuneaton & Bedworth, have a local industrial employment land shortfall.

Table 4.2 Local Industrial Residual Need 2021-41 (Ha)

	Need	Supply	Residual Need
Rugby	58	5	53
North Warwickshire	60	34	26
Nuneaton & Bedworth	41	52	-11
Coventry	105	60	45
Stratford*	144	56	88
Warwick	83	37	46
Total	492	244	248

NB: figures may not sum due to rounding

Table 4.3 Local Industrial Residual Need 2021-45 (Ha)

	Need	Supply	Residual Need
Rugby	68	5	63
North Warwickshire	70	34	36
Nuneaton & Bedworth	48	52	-4
Coventry	122	60	62
Stratford*	167	56	111
Warwick	97	37	60
Total	572	244	328

Table 4.4 Local Industrial Residual Need 2021-50 (Ha)

	Need	Supply	Residual Need
Rugby	80	5	75
North Warwickshire	82	34	48
Nuneaton & Bedworth	56	52	4
Coventry	143	60	83
Stratford*	196	56	140
Warwick	113	37	76
Total	670	244	426

*position up to 2022/23

Source: Icen Projects analysis of Local Authority Monitoring data

- 4.6 This section has not considered the office floorspace supply-demand balance. In order to calculate this local authorities should subtract office completions for the 2021/22-2023/24 period, office floorspace commitments and any existing allocations designated for office development from the office need set out in table 3.10 which was derived in the 2022 HEDNA.

Strategic Sites

- 4.7 The residual strategic site need is calculated by taking off the 656ha of strategic site commitments in Coventry & Warwickshire (see table 3.3), deducing a need equivalent to the notional site recommendations totalling 200-375ha (covering the 2021-45 period).
- 4.8 Whilst some current local plans run to 2041 (or 2039 in the case of Nuneaton & Bedworth BC) it may be appropriate nonetheless to consider the strategic site need position to 2045, reflecting that some sites may continue to be built out beyond the plan period.
- 4.9 WMSESS took account of strategic site commitments up to April 2022.
- 4.10 Since then, Padge Hall Farm (Watling Street) in Rugby has been permitted⁴(64ha). Although not within it, the site is closest aligned to Area 7 Opportunity Area and can be netted off. Furthermore, Lyons Park - Lyons 106⁵ has been completed that was not in the WMSESS commitments, providing a residual need of 9-84ha for this Opportunity Area.
- 4.11 The residual strategic sites need is as follows:
- Area 5: North Warwickshire – 50-100ha
 - Area 7: M6 / A45 / A46 / M45 Coventry & Rugby – 9-84ha
 - Area 8: A46 / M40 Warwick – 75-125
 - **Total: 136 – 311ha**

⁴ R21/0985

⁵ 2ha closest rounded hectare plot size for this plot

4.12 Within Area 7, the local authorities of Coventry, Warwick, Rugby and NBBC will need to work together to consider potential sites which will inform the specific allocation of figures to individual LPAs. Area 8 can be dealt with by the South Warwickshire Local Plan which covers both Warwick and Stratford-on-Avon.

A1. Strategic Sites Commitments

Local Authority	Site	Allocation / Planning Permission	Description	Land (Ha)	Use
Coventry	Land at Baginton Fields and South East of Whitley Business Park	Allocation	Employment Type: B1b&c, B2 & B8	25	Mixed
Rugby	Tritax Symmetry, Land North of Coventry Road	Allocated site with outline planning permission (R16/2569). Parts of site with full planning permission (R20/1026 & R21/0790 & R22/0803)		46.2	Mixed
Rugby	Prospero Ansty	Outline Planning Permission (R19/1540). Parts of site with Full Planning Permission (R19/1512), Under Construction or with Reserved matters (R21/0784)	Erection of two buildings within Class B2 with ancillary office.	49.4	B2
Rugby	Former Peugeot Factory Site C (Prologis Park)	Outline Planning Permission with Reserved Matters (R16/2561 & R17/2019)	Employment development on designated strategic site.	16.7	Mixed
Rugby	Rugby Radio Station	Allocated Site with Outline Planning Permission (R11/0699)	Urban extension to Rugby for up to 6,200 dwellings...31 hectares (up to 106,000sq.m) of commercial and employment space (B1, B2 and B8)	16	Mixed
Rugby	Coton Park East	Allocated site with full planning permission (R22/0551)	Application for full planning permission for storage and distribution floorspace (Class B8 use).	8.7	Mixed

North Warwickshire	Land at Mira	Allocated site	B2 use	42	B2
North Warwickshire	West of Birch Coppice, Dordon	Allocated site	B1/B2/B8	5.1	Mixed
North Warwickshire	Playing fields South of A5, Dordon	Allocated site	B1/B2/B8	3.5	Mixed
North Warwickshire	Former B Station Site - Prologis Park Hams Hall (DC2, 3 & 4)	Full planning permission (PAP/2016/0399)	Demolition of existing buildings and redevelopment of site for industrial/distribution uses (Use Class B2/B8) including ancillary offices.	8.9	Mixed
Nuneaton and Bedworth	Faultlands	Allocation and full planning permission (034901 & 038406 & 038687)	Redevelopment of existing land for up to 92,904 sq.m of B2 (General industrial) and B8 (Storage and distribution) floorspace	26	Mixed
Nuneaton and Bedworth	Meadow Off Pilgrims Walk	Outline planning permission (039023)	Erection of industrial units for (either Class Use B2 - General Industry or Class Use B8 - Storage and Distribution) to include ancillary offices (Class Use E formally B1a)	5.9	Mixed
Stratford-on-Avon	Jaguar Land Rover	Allocated		100	B2
Warwick	Gateway South, Land to south and west of Coventry Airport	Outline planning permission (W/18/0522)	Comprehensive redevelopment of land South of Coventry Airport, comprising demolition of existing structures and the erection of new buildings to accommodate general industrial uses (Use Class B2) and storage and distribution (Use Class B8)	177.7	Mixed
Warwick	Coventry Airport	Outline planning permission (W/21/1370)	Development of battery manufacturing facility	124.7	B2
Total				655.8	

A2. WMSESS 2023/24 – Opportunity Area Recommendations

Opportunity Area	Notional supply – years (hatching=current committed supply)					Market rank	Indicative phasing	Indicative additional strategic site requirement at B8/mixed c.50ha - E(g)/B2 c.25ha	Narrative – market rank / performance, scale (no. LPA), site supply, SRFIs, Green Belt
	Type	0-5	5-10	10-15	15-20				
Area 1: M6 Stoke and Stafford	B8/ Mixed					B	C	2	Large OA. Market supply at present but potential for two sites through study period.
	E(g)/B2						B	0-1	Has existing manufacturing focused supply – but non-strategic (sub 25ha). Blended sites may be preferable.
Area 2: M6 / M54 South Staffordshire and Black Country	B8/ Mixed (road)					B	D	1	WMI providing major strategic supply. Potential for additional road based supply later in the period. Constrained GB area.
	E(g)/B2						D	1	i54 has existing supply but potential for extension later in period – not all take up strategic. Constrained GB area
Area 3: M54 Shopshire	B8/ Mixed					C	A	1-2	OA with demand overspill from Black County on M54. Part constrained GB area.
	E(g)/B2						-	0	i54 expected to absorb demand.

Area 4: M6 Toll / A5 / A38 Lichfield	B8/ Mixed					B	A/B	1	Part GB constrained OA. A5/M6Toll route not established location.
	E(g)/B2						-	0	Not established location, preferable alternatives.
Area 5: M42 North Warwickshire	B8/ Mixed					A	B	1-2	Part GB constrained OA. High demand established location. Supply requirement later in study period. Two existing SRFIs.
	E(g)/B2						-	0	Existing supply at MIRA considered sufficient.
Area 6: M42 Solihull	B8/ Mixed					A	C	1-2	Constrained GB area. High demand location with good labour market proximity.
	E(g)/B2						B	0-1	Anticipated market / occupier potential.
Area 7: M6 / A45 / A46 / M45 Coventry & Rugby	B8/ Mixed					A	C/D	1-2	Large OA. Highest existing supply. High demand location. Part GB constrained OA. Supply requirement later in study period.
	E(g)/B2						C/D	1-2	Highest existing supply although Coventry Airport is a single occupier site that may shorten supply period. Further supply at Ansty Park. Potential to attract further investment.
Area 8: A46 / M40 Warwick	B8/ Mixed					B	A	1-2	Large OA. Existing supply is in Warwick but at Coventry, identified in Rugby/Coventry OA.
	E(g)/B2						C/D	1	Existing JLR/AML supply concentrated for single occupier. Potential for further manufacturing agglomeration.
Area 9: M42 / M5 / A435 Redditch and Bromsgrove	B8/ Mixed					C	B	1-2	Large OA. GB constrained OA.
	E(g)/B2						C/D	0-1	High manufacturing labour concentration. Existing supply but potential for further supply if take up increases.

Total	B8/ Mixed							10-16 (500-800ha)	
	E(g)/B2							3-7 (75-175ha)	

Source: WMSESS 2023/24