

READING EMPLOYMENT AREA ANALYSIS

April 2025

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1. Introduction

- 1.1 The future of existing employment land is one of the key questions for how Reading develops over the coming years. Within such a constrained urban area, the industrial areas are coming under some pressure for alternative uses, particularly housing. There are significant needs for both employment and housing within Reading, and meeting as much of these needs as possible is a difficult balancing act.
- 1.2 This analysis aims to investigate two matters in particular:
1. Identify which employment areas are critical to the economy of Reading and the surrounding area and should be protected, and which areas may have potential for release to other uses; and
 2. Identify any potential for existing employment areas to accommodate additional employment development to help meet the identified needs.

National Planning Policy Framework

- 1.3 The National Planning Policy Framework (NPPF) in paragraph 8 identifies three overarching objectives for the planning system in achieving sustainable development, including an economic objective as follows:
- “to help build a strong, responsive and competitive economy, by ensuring that sufficient land of the right types is available in the right places and at the right time to support growth, innovation and improved productivity; and by identifying and coordinating the provision of infrastructure”*
- 1.4 The NPPF further makes clear that planning policies and decisions *“should help create the conditions in which businesses can invest, expand and adapt”* and that *“significant weight should be placed on the need to support economic growth and productivity, taking into account both local business needs and wider opportunities for development”* (paragraph 85). This includes the need to set an economic vision and strategy, identify sites for investment, address barriers to investment and incorporate flexibility for new or unforeseen needs. The December 2024 version of the NPPF added a requirement to meet the needs of a modern economy.
- 1.5 The NPPF (paragraph 87) additionally identifies specific sectors for which locational requirements should be considered, as follows:
- knowledge and data-driven, creative or high technology industries;
 - storage and distribution operations; and (additionally in the 2024 NPPF)
 - expansion or modernisation of other industries of local, regional or national importance.

Identified need

- 1.6 The needs for additional employment development have been assessed within the Commercial Needs Assessment, which reported in February 2025. This identified a significant positive need for additional employment floorspace. The report used various scenarios and assumptions, but the Council considers that the most robust need figures for the period 2023 to 2041 from the CNA are as follows:

- 85,803 of office floorspace; and
 - 167,113 sq m of industrial, warehouse and research and development floorspace.
- 1.7 This is a very significant level of new floorspace, particularly for industrial and warehouse space. Whilst there has continued to be new development of offices both in the town centre and out of town locations in recent years, the geographical extent of Reading's more traditional employment areas suitable for industrial and warehouse space has changed little over recent decades, other than to contract somewhat. Meeting these needs will require new sites to be identified, but it will also mean needing to ensure that those employment areas which genuinely have a future for that use continue to provide space for employment uses.
- 1.8 The significant need for new residential development is also of importance. The Housing Needs Assessment (2024) identifies a need for 735 dwellings per year, above the figure for which the adopted Local Plan provides of 689 per year. Given Reading's constraints, including very limited potential for use of greenfield land, there is pressure on many of Reading's older employment areas for potential redevelopment for residential to help to meet this need.
- 1.9 There is therefore a need for a full assessment of Reading's existing employment areas and allocations to understand how policy should treat the various areas. Some areas are essential to future economic growth and will need to be retained. Others may be less vital to the local economy, and can be considered for release for other uses. This assessment seeks to provide the evidence to make decisions about the employment future of a location.

Other publications

- 1.10 This report has links to some other publications which inform current or previous planning policy.
- 1.11 The Housing and Economic Land Availability Assessment (HELAA, November 2024) is the main vehicle for considering the capacity of sites to meet development needs, and is the most significant piece of evidence to support the site allocations in the Local Plan. It is strongly related to this report, in that all significant existing employment sites are considered within the HELAA for (in most cases) residential development. Whilst those areas are considered in both documents, the HELAA and Employment Area Analysis have distinct roles. The Employment Area Analysis considers the importance of the area for employment and whether it should be retained in its existing role. This includes consideration of whether, on those sites to be retained, there is scope for intensification to help to meet employment development needs. Meanwhile, the HELAA considers the suitability, availability and achievability of those areas for residential use, and takes account of the conclusion of this document on whether uses should be retained.
- 1.12 This report also builds upon past work that was undertaken to support existing planning policy. A previous version of this Employment Area Analysis was produced in March 2018 to provide evidence for employment policies in the Local Plan, in

particular the identification of Core Employment Areas. This report is an updated version taking account of any relevant changes.

Background to Reading's employment areas

- 1.13 This report considers 20 employment areas within Reading, ranging from large business parks to small clusters of employment uses within residential areas. Table 1.1 sets out some headline information on each of the employment areas for context, using figures derived from the most up-to-date survey. In total, the areas surveyed cover some 248 ha, and contain almost 900,000 sq m of employment and related floorspace.

Table 1.1: Overview of employment areas

Area	Size (ha)	Part of Reading	Description	Office floorspace (sq m) ¹	Industrial/ warehouse floorspace (sq m)	Other floorspace (sq m)	% floorspace vacant
Green Park	33.65	South	Modern office park	121,300	0	0	7
North of the M4	36.58	South	Modern office and warehouse area	33,000	82,800	1,400	0
Worton Grange	19.44	South	Modern office and warehouse area	21,200	51,500	3,600	13
Acre Road	10.38	South	Mixed employment area	0	42,800	0	15
Bennet Road	20.76	South	Mixed employment area	9,900	50,200	4,100	0
Manor Farm	19.6	South	Mixed employment area	19,900	73,700	3,200	3
North of Basingstoke Road	18.04	South	Mixed employment area	600	58,100	8,700	1
Elgar Road	6.57	South	Mixed employment area	0	27,200	1,200	13
Island Road	21.1	South	Permitted new employment location/ modern warehouse area	0	35,300	0	38
Rose Kiln Lane	9.3	South	Mixed commercial location	3,800	11,400	14,600	15
Paddock Road	1.63	Caversham	Small industrial estate	0	6,400	0	14
Richfield Avenue	17.18	West	Mixed employment area	5,100	62,200	6,300	17
Portman Rd/Loverock Rd	13.76	West	Mixed employment area	2,200	60,600	5,200	2
Stadium Way/Deacon Way	10.86	West	Mixed employment area	0	38,700	0	9
Bridgewater Close	1.61	West	Small industrial estate	0	4,200	3,400	0
Wigmore Lane	0.73	West	Small industrial location	0	1,400	0	0
Sterling Way	1.56	West	Small industrial estate	0	4,900	1,500	13
Marcus Close	2.18	West	Small industrial estate	0	8,000	1,000	0
Fobney Mead	2.26	South	Former laboratory	0	1,100	0	100
Gosbrook Road	0.41	Caversham	Small-scale employment uses in residential area	0	1,500	0	0
TOTAL	247.6	N/A	N/A	217,000	621,800	54,300	11

¹ Floorspace figures are rounded to the nearest 100. Total figures may not sum due to rounding.

2. Reading office and industrial market summary

- 2.1 The following represents a general summary of the market within Reading for offices and industrial and warehousing space, presenting a general overview as well as any clear trends differentiating the various areas within Reading. It draws on a variety of published sources, listed at the end of the section.
- 2.2 It should be noted that references to the Reading commercial property market are not generally restricted to Reading Borough. The urban area of Reading straddles local authority boundaries, and employment locations such as Thames Valley Park, Suttons Business Park, Winnersh Triangle, Arlington Business Park, the new university science park and a number of other smaller locations would usually be considered to operate within the Reading market despite being located in Wokingham or West Berkshire.

Office market

- 2.3 Nationally, post Covid, there has been an increasing demand for high quality, sustainable developments alongside a general reduction in occupier space requirements as the employee market has shifted to a balance of home-working and office-based working (Haslams, 2025). Operator requirements are still shifting with research by Hays Recruitment showing an increase in employee office attendance for a second year in a row with an increase from 36% to 43% 2023 to 2024 (Vail Williams, 2024). There is also the need to meet new energy efficiency regulations (Skills and Business Hub, 2023).
- 2.4 The following provides a general snapshot of the current market for office space in Reading and the wider Thames Valley.
- Reading continues to have two distinct office markets comprising space within the centre at high density and the modern business park of Green Park. Within the wider area there is also Thames Valley Park, Winnersh Triangle and Arlington Business Park. There is smaller scale and older office stock within other employment areas in the Borough and shopping centres, although there has been a continuing trend for conversions under prior approval to residential for those offices where letting has been more challenging.
 - It is the largest office centre in the South East Office Market and has the highest quantum of Grade A office space compared to other South-East submarkets (Savills, 2023)
 - Supply has increased over recent years to stand at a 13-year high of 2.6m sq ft (LSH, 2024). The office market is performing well compared to other locations due to the critical mass of: IT professional services; a good scale and choice of offices; more headquarters across a number of sectors – information and communications, professional services, life sciences and financial services with Reading ranking first in the UK for the number of foreign headquarters including Microsoft, Oracle, Veritas, Huawei and Thales Group (Skills and Business Hub, 2023); Good transport connectivity including the Elizabeth Line (opened in 2022) and Green Park Station (2023); access to a wide and high-quality labour pool; and lower housing costs (REDA, 2024), as well as very good urban mobile and

internet connectivity and ultrafast broadband (>300Mbps) available to over 90% of premises in Reading (Berkshire Economic Strategy 2025-2035, 2024)

- The demand for office accommodation is focussed on the digital tech sector, which generates almost one quarter of Berkshire's GVA (Skills and Business Hub, 2023). The Thames Valley Science Park is a hub for innovation and research. There is also a focus on sectors such as life sciences, energy and the environment and the location is becoming a hub for film and tv production (Skills and Business Hub, 2023).
- Total office take-ups in 2024 in the greater Reading market, which comprises Reading town centre and out of town business parks on M4 at junctions 10, 11 and 12 was approx. 570,000 sq ft, an improvement on 2023 (approx. 478,000 sq ft) and the highest level over a 5-year period (Hicks Baker, 2025).
- Reading's strong strategic location with its close proximity to Greater London, Heathrow Airport, the M4 and wider motorway network beyond, generates demand from a wide range of occupiers, based locally and from further field (Hicks Baker, 2025).
- Headline rental levels in Reading have increased in 2024 for the best-in-class space, now typically ranging between late £30's and mid £40's per sq ft and means that it has one of the highest rental levels in the southern England. Recent deals at One Station Hill achieved £56 per sq ft (LSH, 2024). The newest, higher quality stock is what has performed well in Reading, which are those with an array of amenities and with strong ESG credentials. Offices which are accessible, and flexible and offer collaborative workspaces with shared spaces such as cafes, breakout rooms, gyms, bookable meeting rooms and showers and bike racks/maintenance areas or have access to these close by (Hicks Baker, 2024). An example of this is One Station Hill with space let in 2024 to PepsiCo, PwC, and NewFlex totalling 115,000 sq ft, representing over 40% of the 275,000 sq ft office scheme, and Kenvue announced as a new additional occupier in early 2025 (Hicks Baker 2025).
- There is, however, a two-tier market between existing and newly built offices with a polarisation of rents between Grade A and Grade B office stock and greater difficulty in letting Grade B offices which do not have the level of amenities that occupiers are demanding, and this see a significant proportion repurposed for alternative uses (Vail Williams, 2024)
- Given rising costs of construction combined with high interest rates and inflation there is limited new office development in the pipeline, which will continue to sustain these rising rent levels (Hicks Baker 2025), but the south-east office market is well-positioned for continued growth in 2025 (Oktra, 2025).
- In 2024 the letting activity was weighted towards the town centre rather than out-of-town locations, equating to 60% of all the deals done with the most active occupier sectors being professional services, pharma, tech/science, and defence. There was a higher frequency of bigger scale lettings of over 5,000 sq ft (about 83% of take-up) (Hicks Baker, 2025).

Industrial market

2.5 The following provides a general snapshot of the market for industrial and warehouse space in Reading and the wider Thames Valley in recent years.

- The rising cost of warehousing space near London has meant that occupiers are exploring options along the M4 corridor. Therefore, demand for space for industrial and warehouse uses is very strong across the region. It is one of the prime industrial locations in the UK (Haslams, 2025).
- The overall supply of space in Greater Reading has in recent years not met demand. The majority of the available stock is second hand and of relatively low quality. There is a limited supply of new or good quality units of all sizes. However, in 2024 there was an increase in space from 534,000 sq ft to 822,000 sq ft, 29% above the 5-year average. There are new schemes coming forward including a logistics scheme at Shire Hall, Shinfield, for approximately 225,000 sq ft; 185,000sq ft Hurricane Urban Hub in Woodley and construction imminent on 155,300 sq ft Reading Logistics Park, near J11 of the M4 (Haslams, 2025).
- There will be a significant supply gap of the mid-box stock if current lettings under offer are completed. The availability and quality of smaller units continues to increase as a result of increased business costs (Haslams, 2025).
- With demand for high-quality modern units outstripping supply there has been an increase in industrial rents which are likely to reach above £20 per sqft in Reading in 2025 for the very best product, but the rents are more attractive than West London (£25-30) or even Slough (high £20s) (Haslams, 2025).
- A particular driver of demand is from more traditional warehouse and industrial occupiers seeking to relocate as a result of data centre displacement. The largest letting in 2024 was the pre-leasing of 46,000 sq ft at Suttons Business Park (on the eastern edge of Reading) to Synergix Logistics (Haslams, 2025).
- The demand for industrial open storage remains steady. Although occupiers are still seeking more energy efficient buildings due to rising utility costs, gas continues to be a key operational requirement for many occupiers (Haslams, 2025).
- There is currently a gap in the market for small workshops and move-on space for new and growing businesses (Berkshire Economic Strategy 2025-2035, 2024).

References

2.6 The following sources were used to assemble the above market information

- Berkshire Economic Strategy 2025-2035 (2024) https://democratic.bracknell-forest.gov.uk/documents/s204352/BerkshireEconomicStrategy_Final_161224.pdf
- Haslams (5/1/25) 'Predictions for the Commercial Property Market in 2025' <https://haslams.co.uk/predictions-for-the-commercial-property-market-in-2025/>
- Haslams (2025), Greater Reading Industrial Market 2024
- Hicks Baker (2024), Responding to the demand of Today's office

- Hicks Baker (April 2025) Reading Office Market Commentary – 2024 Review <https://www.hicksbaker.co.uk/reading-office-market-commentary-2024-review-2025/>
- JLL (2023), Western Corridor Industrial & Logistics Market Update Spring 2023 <https://storymaps.arcgis.com/stories/0dfd4b36863243a3841f9ab9b1417ec0>
- Lambert Smith Hampton (2024), 'Time to Move' - Thames Valley & South East Office Market Report 2024 <https://www.lsh.co.uk/-/media/files/lsh/research/2024/se%20office%20report%202024%20-%20final>
- Lambert Smith Hampton (2025), 'Keeping the Faith' – Industrial and Logistics Market 2025 <https://www.lsh.co.uk/-/media/files/lsh/research/2025/ilm%202025%20final>
- Oktra (2025), The Cost of Office Space in South East England 2025 Report <https://cdn.oktra.co.uk/content/uploads/2024/05/02115919/Oktra-South-East-Office-Rent-Report.pdf>
- REDA (6th December 2024), New research shows Reading office market performing well <https://www.visit-reading.com/business/news/2024/12/6/new-research-shows-reading-office-market-performing-well-a2653>
- Savills (2023), Reading: positioned for growth Savills Spring 2023 <https://pdf.euro.savills.co.uk/uk/spotlight-on/spotlight-reading---2023.pdf>
- The Skills and Business Hub (Formerly Berkshire LEP) (2023), A New Start for Berkshire - Revisiting the Berkshire Recovery and Renewal Plan
- Vail Williams (2024), Reading revelling in office market revival –Market Insight <https://www.vailwilliams.com/reading-revelling-in-office-market-revival/>

3. Detailed site analysis methodology

- 3.1 The purpose of this analysis is to consider which sites are of greatest importance to the future economic prospects of Reading and therefore should be identified for protection as Core Employment Areas, and which areas make lesser contribution and which should be either left undesignated, or should be actively brought forward for alternative uses.
- 3.2 The first stage of the analysis was to identify the sites to be assessed. For this report, all areas in primarily employment use, or with existing allocations or permissions for primarily employment use, were considered, although there were some exceptions. The exceptions were very small employment sites within areas of other uses, generally residential, and existing town centre offices, which are often part of wider mixed-use sites.
- 3.3 These areas were broken down into 98 more manageable plots, which reflect potential development plots. Clearly, such a definition is always somewhat arbitrary, but it forms a more practical unit for analysis and allows for employment areas to be considered at a finer grain without looking at each individual building in turn.
- 3.4 The plots used for analysis are shown on the maps in Appendix 2.
- 3.5 Each plot was then appraised against a variety of criteria, under nine headings. These headings were as used by the Employment Land Review Site Specific Analysis 2010 and were derived from the government guidance on undertaking Employment Land Reviews, albeit amended slightly. That government guidance is no longer current, but it has not been replaced by anything that would indicate the need for a different methodology, and is considered to be a thorough and logical approach. The headings are set out below:
- Quality of the Existing Internal Environment
 - Quality of the Existing Wider Environment
 - Strategic Access
 - Market Considerations, Perception and Demand
 - Ownership and User Constraints
 - Site Development Constraints
 - Accessibility
 - Sequential Considerations
 - Policy Considerations
- 3.6 **Quality of the Existing Internal Environment:** The following criteria were considered under this heading:
- Age
 - Condition
 - Whether the plot contains uses which cause noise/disturbance to nearby residential uses
 - Contamination

- Other pollutants
 - General environmental quality of external areas
 - Parking and circulation
- 3.7 Where sites are old, in poor condition or lack elements which would be attractive to future business users, such as adequate parking and circulation space, they may be more likely to come forward for development in the plan period. Equally, where these uses currently cause problems for neighbouring residential uses, their loss may be desirable.
- 3.8 **Quality of the Existing Wider Environment:** This heading is concerned mainly with whether the environment surrounding the plot is generally only suitable for employment or related uses. Criteria considered were:
- Adjacent uses
 - Noise affecting the plot
 - Other pollutants affecting the plot
 - General environmental quality of wider area
- 3.9 Plots which are surrounded by other industrial uses and affected by noise and pollutants may have a limited scope to accommodate alternative uses.
- 3.10 **Strategic Access:** This heading relates to access to the strategic transport network, and is primarily concerned with the movement of goods rather than people. The criteria are as follows:
- Distance to Strategic Road Network
 - Quality of roads leading to Strategic Road Network
- A criterion on distance to a rail freight terminal would also have been included, but this does not affect any of Reading's employment areas. Broadly, areas which are most accessible to the strategic transport network are most appropriate for retention as employment land.
- 3.11 **Market Conditions, Perception and Demand:** This heading set out to identify the areas which were not considered to be likely to have a strong future as employment land. There were two main elements to this. The first was an examination of vacancy rates, including whether there was any identified long-term vacancy, which would be particularly indicative of future employment uses being unrealistic.
- 3.12 The second element involved an analysis of market demand, which is set out in section 2. The following conclusions about the broad demand for employment land and premises across Reading are based on that analysis. It should be noted that the terms 'strong', 'medium' and 'weak' demand are relative and that these are in the context of reasonably strong demand for all sizes of unit across Reading.
- Grade A town centre office – strong demand
 - Grade B town centre office – weak demand
 - Grade A out of town office – strong demand
 - Grade B out of town office – weak demand

- Larger, modern industrial units with good access to strategic network – very strong demand
- Larger, older industrial units with good access to strategic network – strong demand
- Larger, modern industrial units with limited access to strategic network – strong demand
- Larger, older industrial units with limited access to strategic network – medium demand
- Larger sites tailored for specific occupiers with good access to strategic network – strong demand
- Larger sites tailored for specific occupiers with limited access to strategic network – weak to medium demand
- High visibility trade counter/showroom site – strong demand
- Low visibility trade counter/showroom site – weak demand
- Units for small and medium sized enterprises <500 sq m – medium demand
- Development site for employment with good access to strategic network – strong demand
- Development site for employment with limited access to strategic network – medium demand

3.13 The following criteria were therefore assessed under this heading:

- % of stock vacant
- % of stock long-term vacant (5 years)
- Strength of demand in market segment
- Known significant recent market activity
- Whether release is likely to be viable (this criterion was used to highlight those few sites where the existing use would have such a high value that release would be unrealistic – these were generally large, modern, high value office blocks).

3.14 **Ownership and User Constraints:** This heading dealt with any known constraints and issues, and did not involve a full survey of the landowners of the sites, although any information that had been gathered in preparation of the HELAA was used. Where information is available, this can give a good indication of whether release of employment land is likely. The following criteria were examined:

- Known ownership constraints
- Whether site is known to be available or unavailable for development

3.15 **Site Development Constraints:** This heading applied only to land not in employment use but already allocated or permitted for employment, but not yet started or completed. In Reading, this covered land at Green Park and Island Road. The single criterion looks at whether there are any constraints that would affect the likelihood of the employment designation being taken up.

3.16 **Accessibility:** This differs from Strategic Access in that it looks at the accessibility of the employment areas to their workforce. Those areas which are highly accessible to their workforce by non-car modes are most suitable for retention. Although it may be the case that areas which are not accessible may not be suitable for other uses either, this is something that must be identified elsewhere when considering the site for a specific use.

3.17 The criteria assessed were:

- Number of residential properties within 800m
- Distance to a bus stop
- Distance to a railway station

3.18 Sequential Considerations: This looks at some key sustainability elements:

- Flood risk from rivers and the sea
- Whether the site is brownfield or greenfield
- Whether the site is urban, urban edge or outside urban

In terms of flooding, employment uses tend to be among the few uses that are acceptable in areas at greater risk of flooding, and a plot located in Flood Zone 3 may be less suitable for release. Similarly, employment uses may be more appropriate on isolated sites in an urban edge location. However, it is recognised that these issues are far from clear-cut, and therefore the conclusions under this heading should be treated with caution as an indicator.

3.19 When flood risk is considered, in this case it is flooding from rivers and the sea that is used to differentiate the sites. Many areas are also affected by surface water flood risk, but in most cases this relates to pooling within the plots as a result of the large extent of hard surfacing, and could likely be relatively easily overcome if a plot were to be developed, and as such it is not considered to be particularly helpful in assessing whether sites should remain in employment use.

3.20 **Policy Considerations:** This is one of the most important elements of the analysis. This looks at specific policy constraints, as well as social and regeneration issues more generally. The following criteria are assessed:

- Proximity to areas of employment deprivation (measured in terms of number of properties within 800m of site which are in 20% most deprived LSOAs nationally for employment in 2019);
- Proximity to areas of education, skills and training deprivation (measured in terms of number of properties within 800m of site which are in 20% most deprived LSOAs nationally for education, training and skills in 2019);
- Availability of other local employment land;
- Whether loss of land would reduce space for lower-value uses that support the economy;
- Whether the site is of importance for particular sectors that are identified at a national or regional level, for instance digital and logistics sectors that are highlighted in the NPPF;

- Presence of small units (less than 150 sq m) (Local Plan policy EM4);
- Presence of move-on units (150-500 sq m) (Local Plan policy EM4);
- Presence of distribution uses in South of Basingstoke Road (Local Plan policy EM4);
- Whether site includes main site of major Reading employer (>250 employees) (not including those who are about to vacate site); and
- Whether the site is within the Detailed Emergency Planning Zone (DEPZ) for AWE Burghfield where alternative uses, in particular residential, is highly unlikely to be appropriate.

3.21 This section therefore highlights some very significant constraints, which may, in many cases, be of overriding importance in terms of releasing the site for other uses.

3.22 **Overall:** For each of the nine headings, a conclusion is reached as to whether the plot has potential for release in terms of those issues. The conclusions are “Yes”, “No” or “Possibly”. We have purposefully moved away from giving a numerical score, which can be totalled, as this would give the pretence of an exact science. Our approach also allows for a very clear presentation of results in a single table. These conclusions are a balanced judgement in each case. There may be specific criteria within each heading where a plot scores well for release, but this may be outweighed by other criteria.

3.23 One other factor that is introduced at this stage is whether it is possible to release a site in isolation. An individual plot may score highly in terms of potential for release, but there is little point promoting it if it is surrounded by important employment uses that need to be retained which would render a development for, in particular, residential unacceptable.

3.24 Therefore, the conclusions under each of the nine headings, taking into account the potential for release in isolation or as part of a larger scheme, result in an overall conclusion as to whether a site could potentially be released. These heading should not be viewed in isolation, as they all contribute to a balanced judgement. There are no formal weightings for any of the nine headings, although the market conditions and policy considerations often tend to present issues that cannot be overcome, and are therefore often overriding factors.

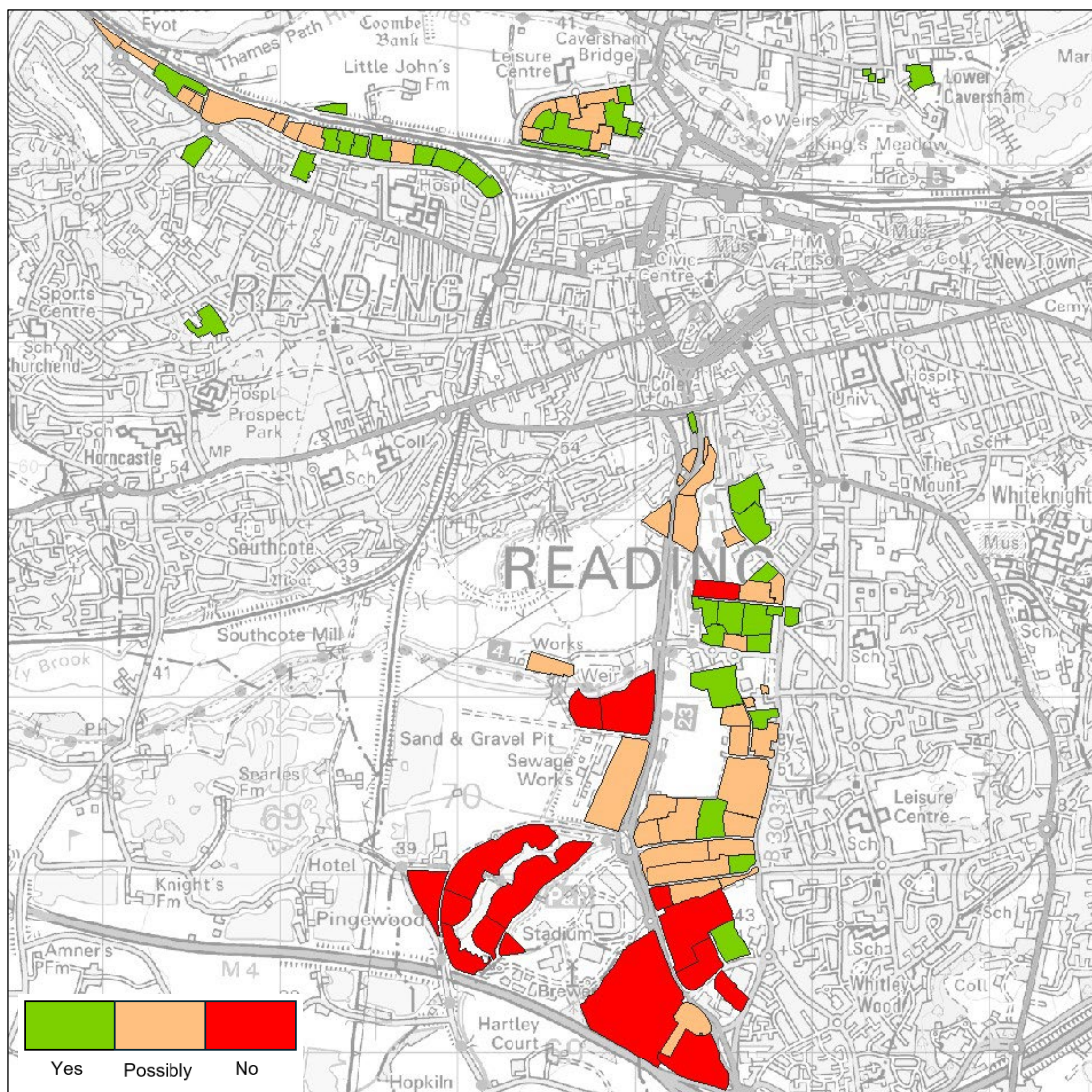
4. Detailed site assessment conclusions

- 4.1 This section presents the results of the detailed site assessment for each plot within the analysis. Each heading is taken in turn, and then an overall conclusion is reached.

Quality of the existing internal environment

- 4.2 Figure 4.1 shows the scores that were given for the quality of the existing internal environment. Those plots that have been considered as being the most suitable for release under this heading tend to be the older areas, particularly in the north and west as well as the northern parts of Basingstoke Road. It also includes the areas with industrial uses very close to residential properties, which may cause noise issues.
- 4.3 Areas least suitable for release under this heading tend to be the more modern and high quality space.

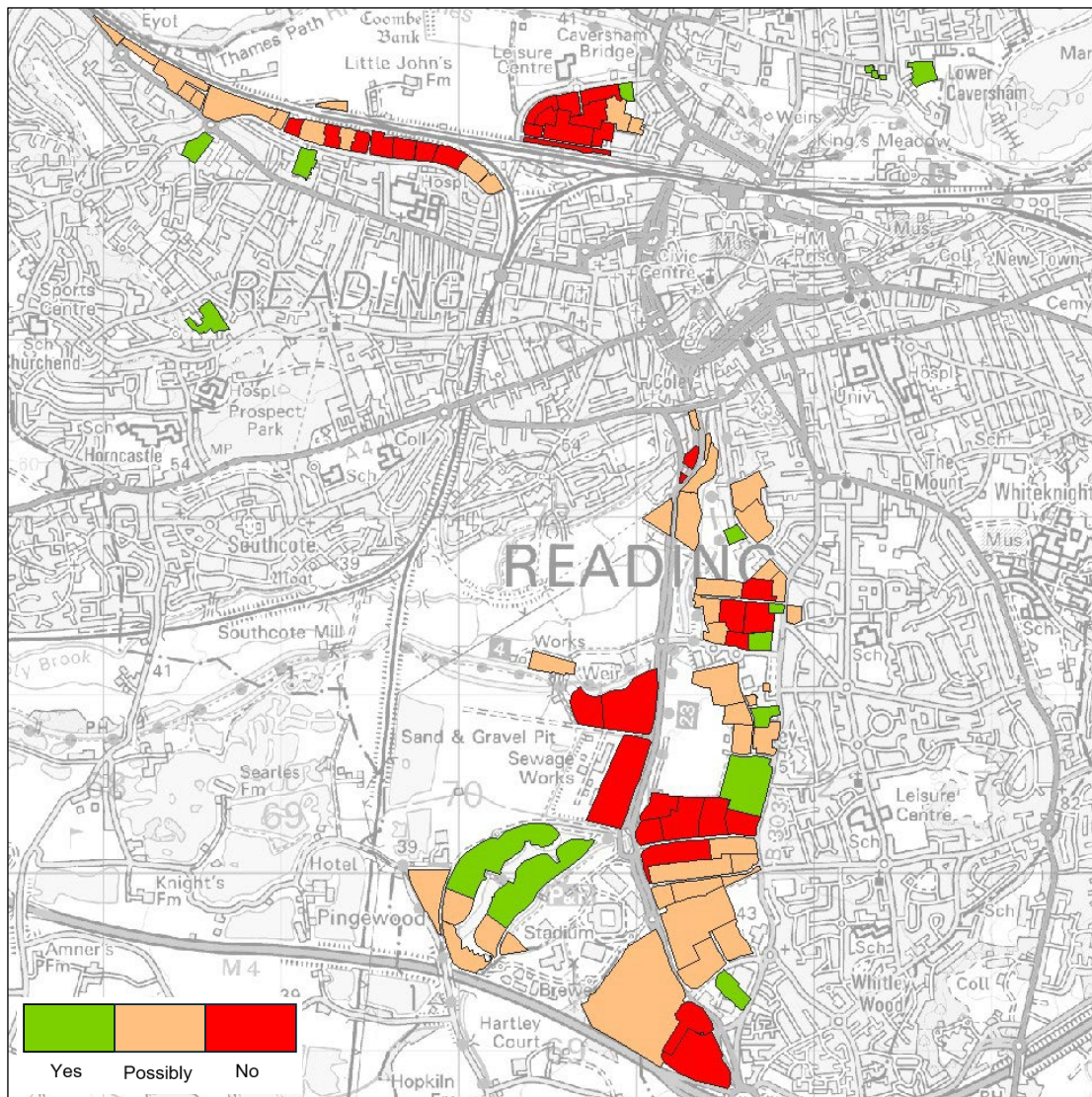
Figure 4.1: Quality of the existing internal environment



Quality of the existing wider environment

- 4.4 Figure 4.2 shows the suitability of sites for release in terms of the quality of the wider environment. In general, those areas which have a more pleasant or tranquil setting come out as more suitable for release. These areas tend to be close to, or surrounded by residential areas, or open spaces, or, at the very least, unobtrusive employment areas.
- 4.5 Areas that are surrounded by noisy or potentially polluting industrial uses, or close to noise and disturbance from other sources, tend to not be considered suitable for release under this heading.

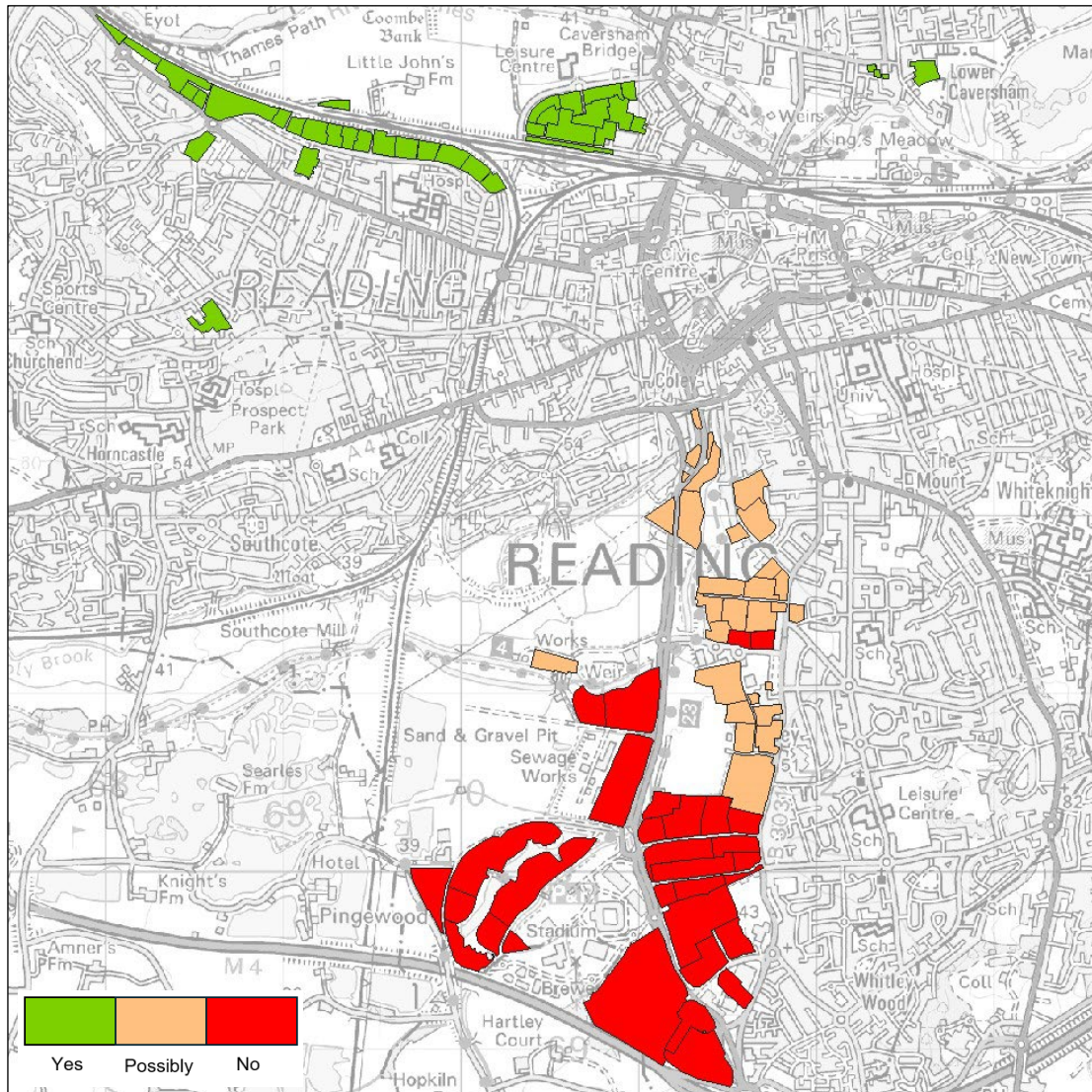
Figure 4.2: Quality of the existing wider environment



Strategic access

- 4.6 Figure 4.3 shows the suitability of sites for release in terms of their access to the strategic transport network. The picture is quite clear from this map – vehicular access is the only significant factor for movement of goods in Reading, and this is almost wholly dependent on the proximity and quality of roads to Junction 11 of the M4. Access to Junction 12 of the M4 is poor, using mainly residential roads, and none of the employment areas are on the right side of Reading to use Junction 10. The rest of the strategic road network is beyond the M4 in any case.

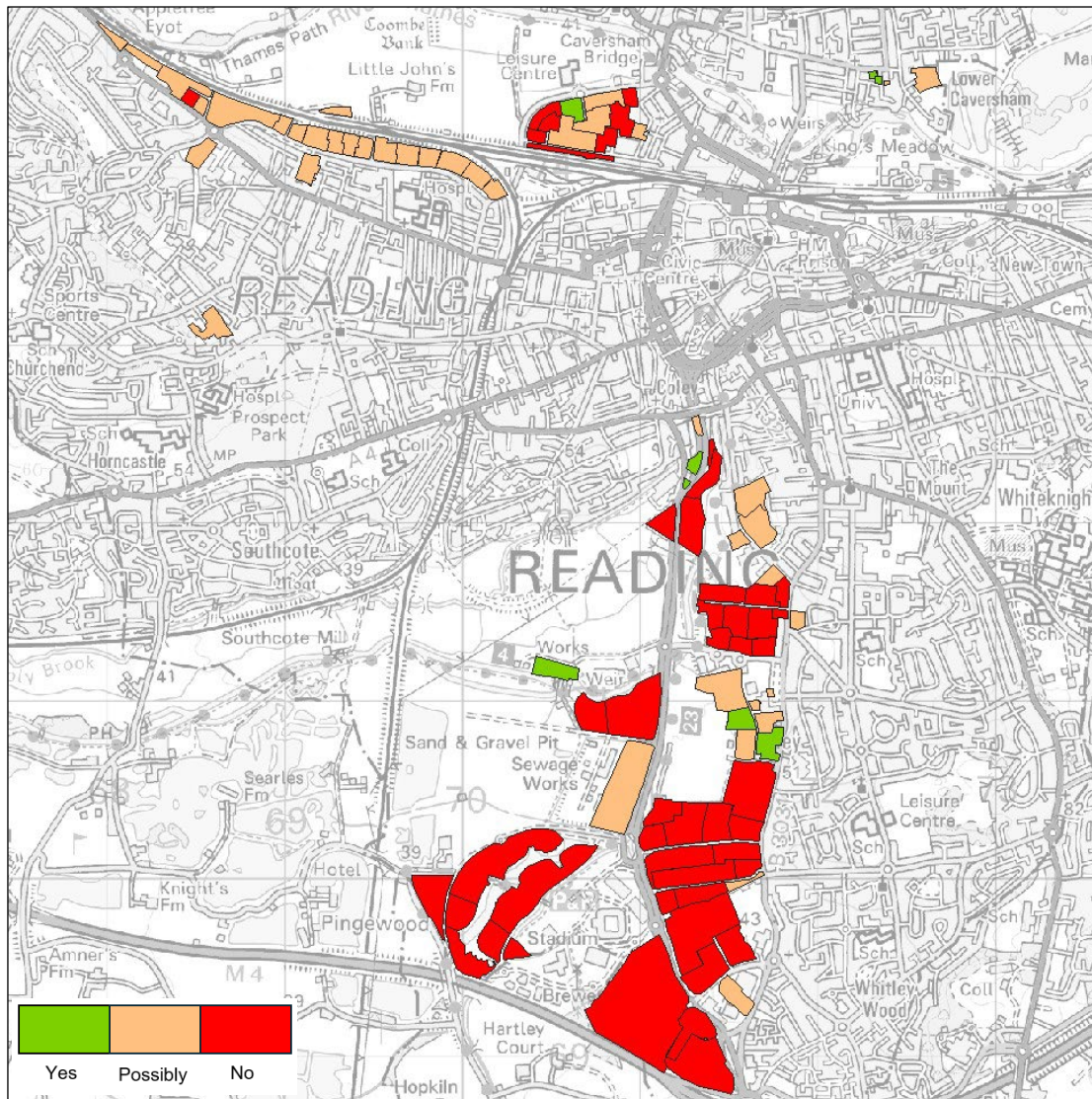
Figure 4.3: Strategic access



Market conditions, perception and demand

- 4.7 Figure 4.4 shows the results of the considerations of market conditions, perception and demand. This shows that the areas with lowest demand tend to be further away from the strategic road network, although the pattern is not clear-cut. Sites with vacancy issues also tend to be shown in green. Meanwhile, sites where the market is strong or there has been recent market activity, or sites where the existing use value is so high that release would not be viable, tend to show up in red.

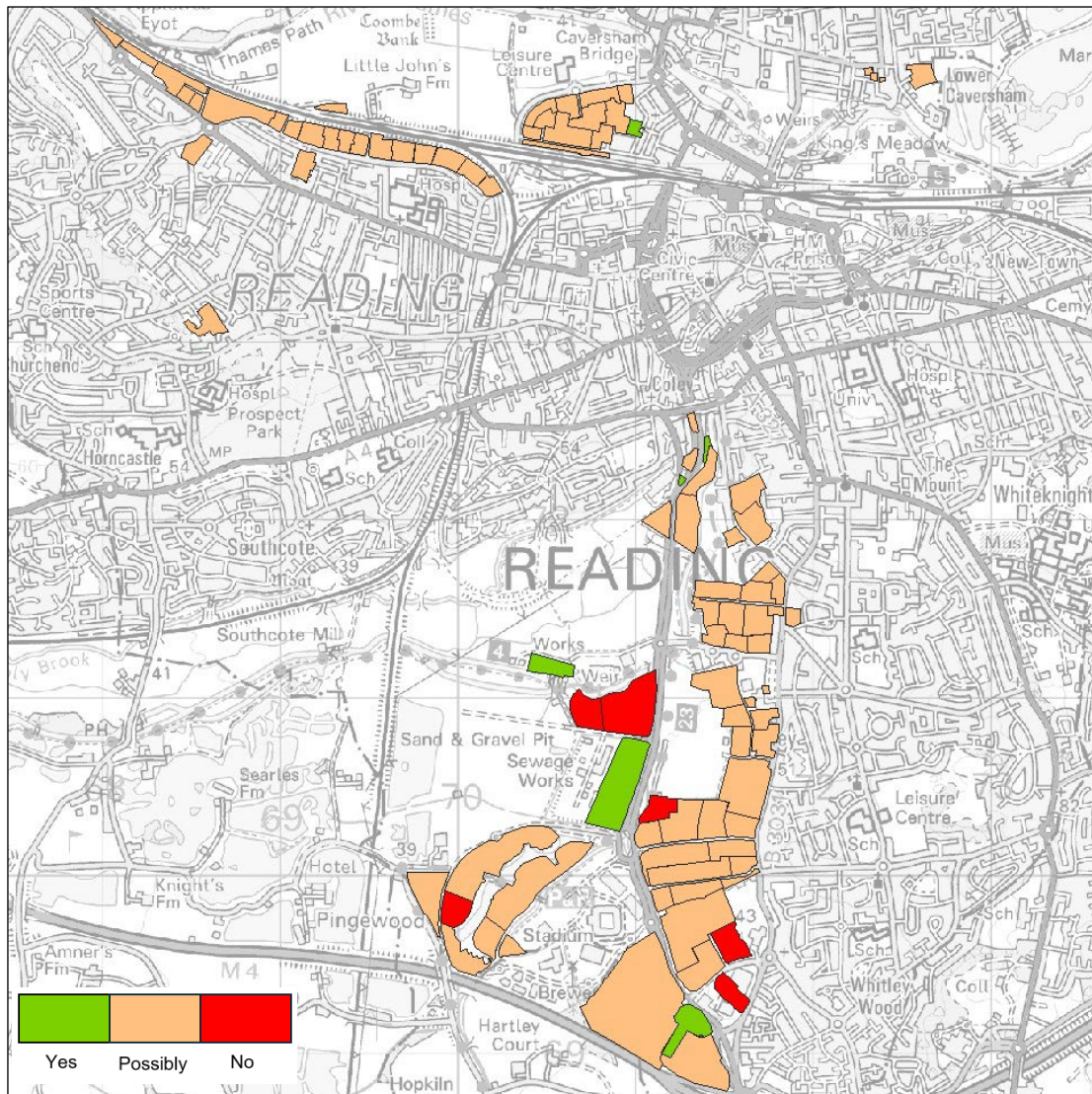
Figure 4.4: Market conditions, perception and demand



Ownership and user constraints

- 4.8 Figure 4.5 shows the differences in terms of ownership and user constraints. In most cases, there is no information in terms of ownership and interest to show that sites are either likely or unlikely to be released. However, there are a number of sites that are being progressed for development either through the Local Plan or other routes, and these are shown in green. Sites not considered suitable are generally those where development for employment uses has very recently taken place.

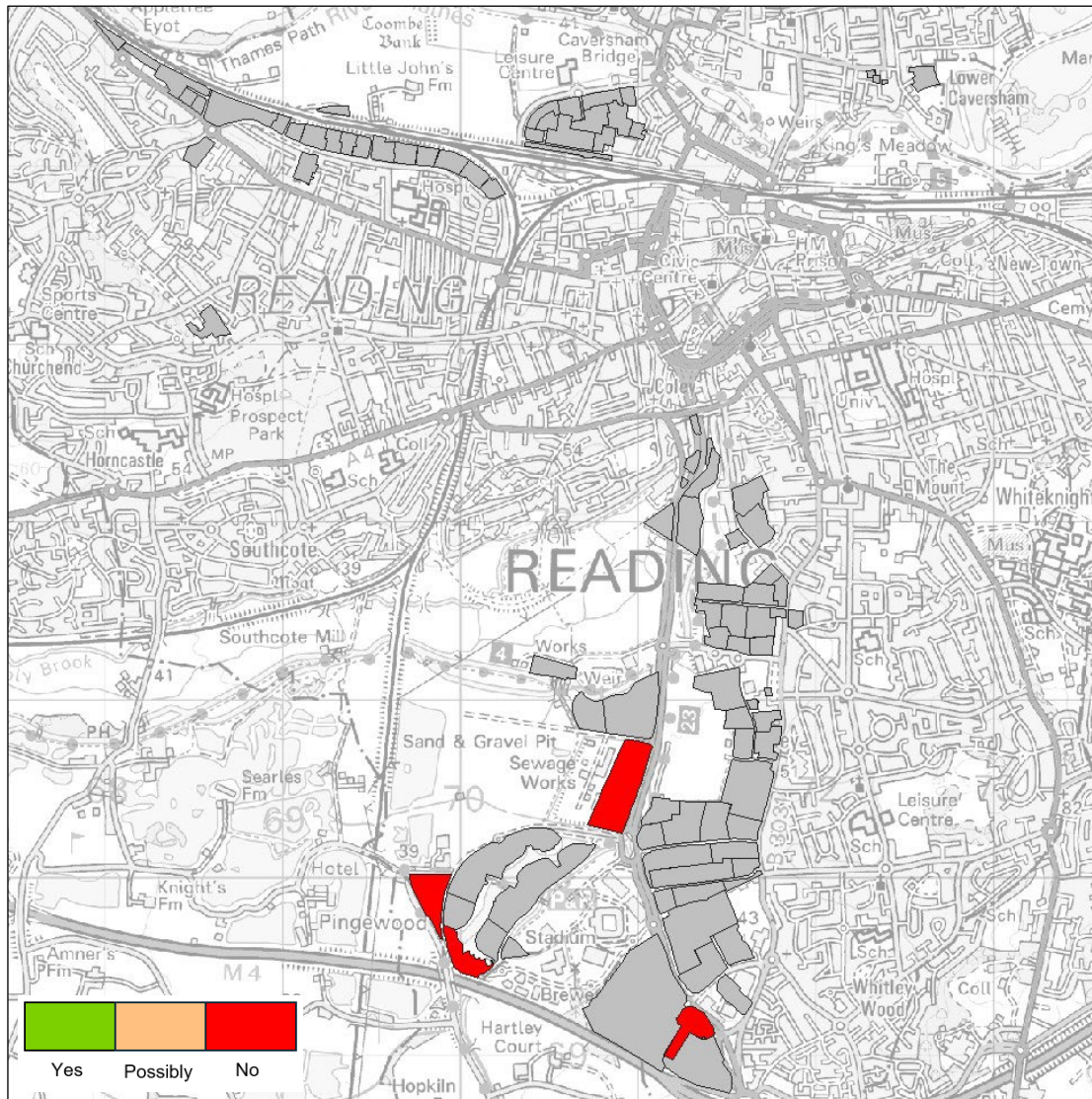
Figure 4.5: Ownership and user constraints



Site development constraints

- 4.9 Figure 4.6 shows whether there are any site development constraints. It applies only to outstanding employment allocations or permissions, generally around Green Park and Island Road. There are no major constraints to prevent most of these committed developments. These sites are not therefore suitable for release against this criterion.

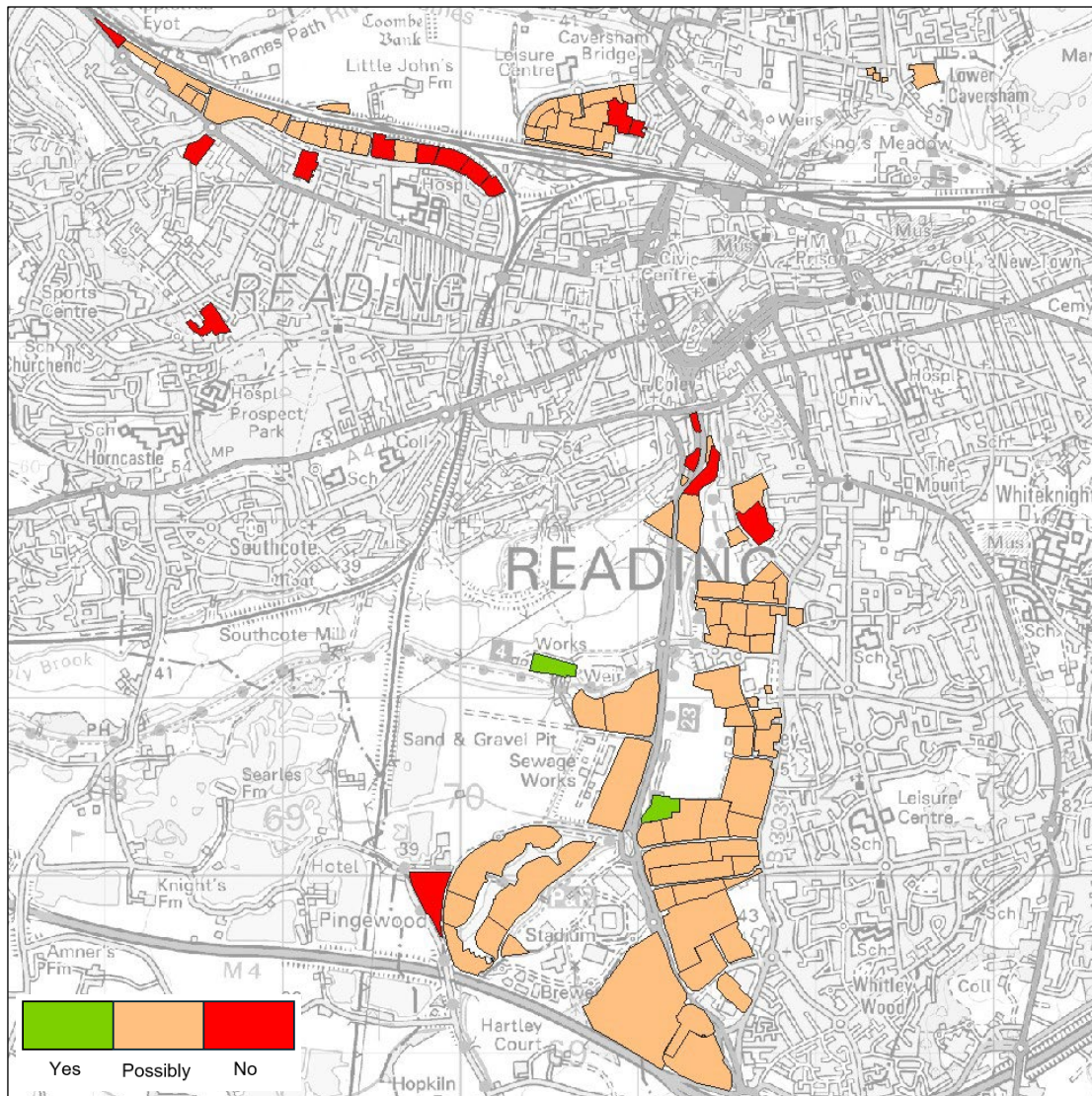
Figure 4.6: Site development constraints



Accessibility

- 4.10 Figure 4.7 shows the accessibility levels for the various sites. In general, most sites in Reading are fairly easily accessible, and, since there is a good bus service, there is little to distinguish between sites in terms of suitability for release. However, those sites which are closest to a very significant number of dwellings, and sites closest to railway stations, are least suitable for release. Meanwhile, the sites which are remotest from residential properties or bus routes are most suitable for release.

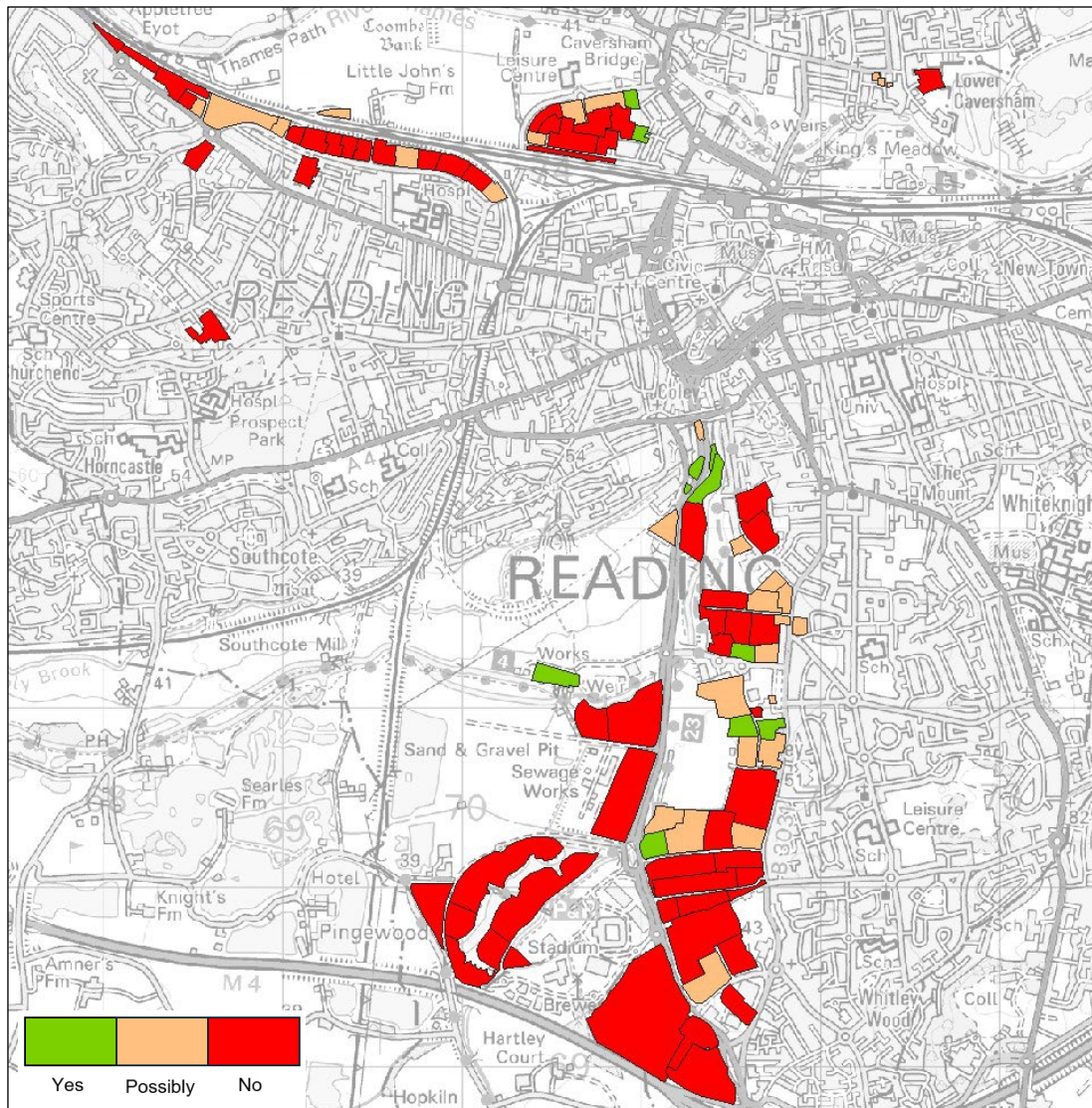
Figure 4.7: Accessibility



Sequential considerations

- 4.11 Figure 4.8 shows the suitability of release of sites in terms of sequential considerations. The sites shown as not being suitable for release are mainly those which are in Flood Zone 3, and where most non-employment uses (and certainly any use for residential) would be significantly constrained. The sites in Flood Zone 1 and which are unencumbered by any other sequential considerations are generally shown as being suitable for release.

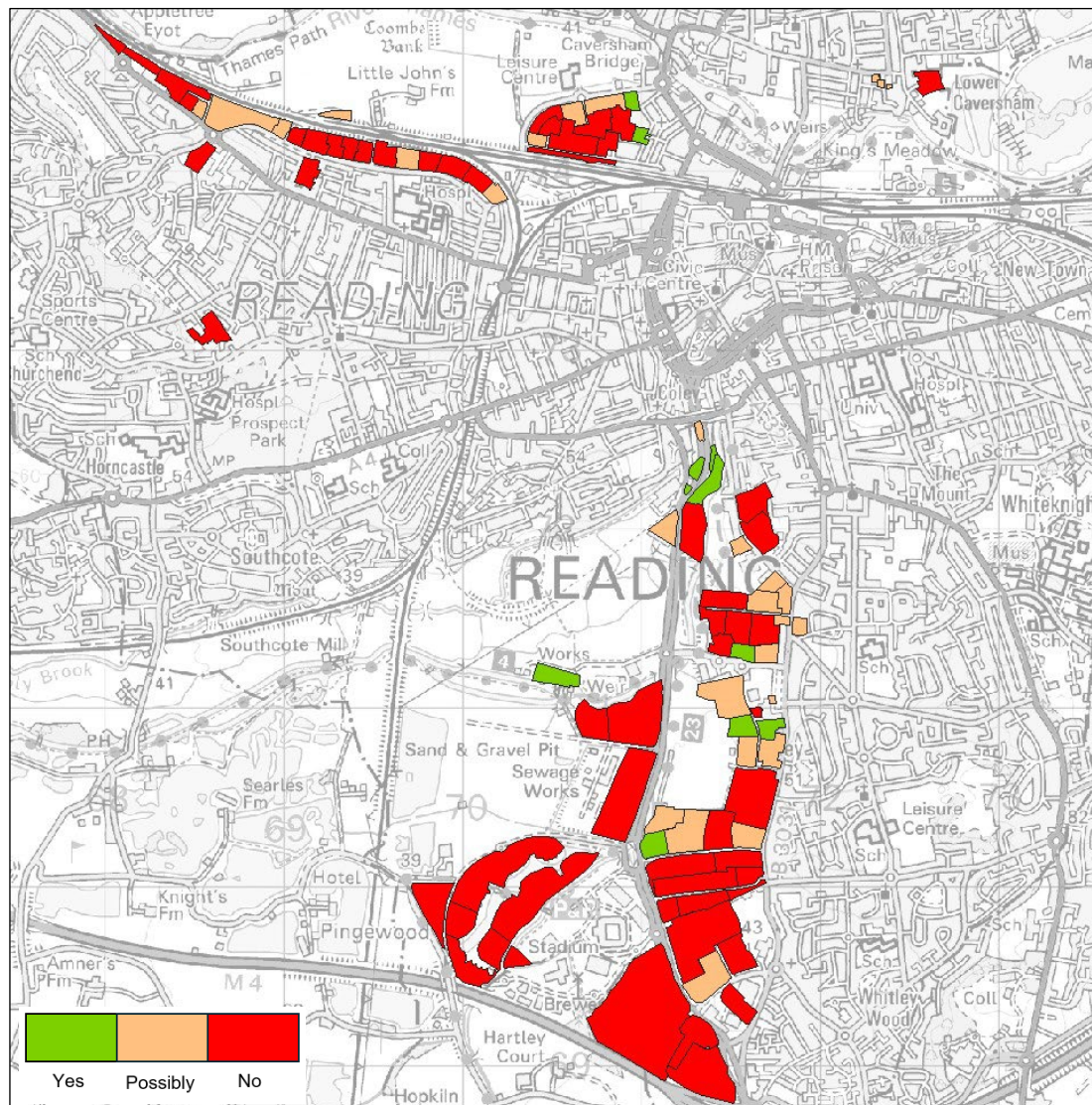
Figure 4.8: Sequential considerations



Policy considerations

- 4.12 Figure 4.9 shows the suitability of sites for release in terms of policy and social and regeneration considerations. There are a substantial amount of considerations at play here, and trends are therefore not as apparent on a map as elsewhere. Sites which show up as not being suitable for release tend to be those that house small units or move-on units, B8 uses in the south of Basingstoke Road, the less glamorous employment stock in west and north Reading and the northern end of Basingstoke Road, and employment stock close to areas of deprivation. The sites shown in green are those with fewest policy constraints on their loss.

Figure 4.9: Policy considerations

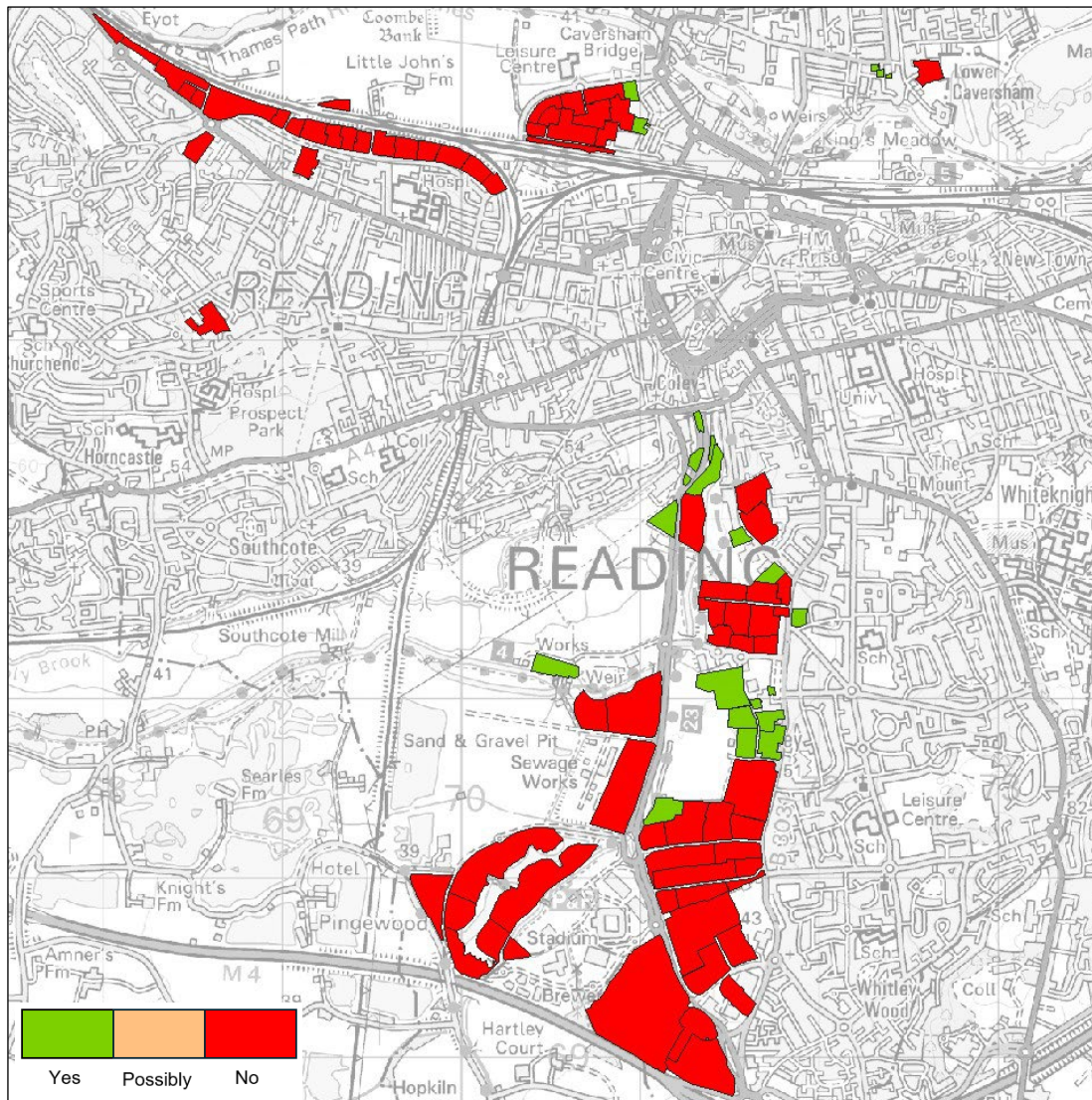


Overall

- 4.13 The nine previous considerations were considered as a whole to decide whether, on balance, a site should be released from an employment designation. This exercise was not looking for sites which did not score any “no”s when assessed against the nine headings, as there were very few such sites. Instead, this overall assessment looked at the reasons why each score was given, whether these reasons could be overcome, or whether negative or positive scores were outweighed by other considerations.
- 4.14 While no numerical weight was attached to any of the considerations, there were clearly headings which tended to be more important than others, and this has been taken into account in the overall score. For instance, as has previously been stated, the sequential considerations are limited as an indicator of whether a site should be released. These considerations are much more important in identifying, for instance, housing sites, but that is a separate process and should be taken into account then. On the other hand, for instance, ensuring an adequate supply of units for small business is vital for the success of the economy, and if release of a site would mean a net loss in small units and it could not be replaced elsewhere, it would not be acceptable. Although it is hard to generalise, the issues under ‘policy considerations’ and ‘market conditions, perception and demand’ often carry particular weight.
- 4.15 It was also important to consider whether it would be possible to release employment sites for other uses in isolation. Some sites which had scored well in terms of potential for release are situated in the middle of, and are fundamentally linked to, employment areas which scored badly. These sites clearly cannot be released to alternative uses. The ‘comments’ column in table 4.12 identifies where this is the case.
- 4.16 The results show that there are several areas which are most suitable for release from the employment land designation.
- The Manor Farm area between Manor Farm Road and Morrisons/Brunel Retail Park;
 - Much of the Rose Kiln Lane North area;
 - The Environment Agency site at Fobney Mead; and
 - Various sites on the fringes of larger employment areas.
- 4.17 Many of these areas are already long-term vacant, suggested for development, or contain uses which do not fall under the ‘employment’ designation for the purposes of the Local Plan (such as car dealerships). Loss of these areas has less of an impact on the overall local economy than loss of well-used employment land.
- 4.18 It is important to point out that the fact that a site is suitable for release does not mean that it is appropriate for residential. This is a separate process, and is undertaken in relation to site allocations in Reading in the Housing and Economic Land Availability Assessment.
- 4.19 Figure 4.10 below shows the areas which are most important to retain and where there could be potential for release. Many of these are in the South of Reading.

Whilst this is the most deprived area of Reading, it is important to bear in mind that the areas which have the popular and valuable employment land would all be retained, in the strongest possible way. Even if all the sites identified in green were to be released, the South Reading area would still have by far the largest concentration of employment sites.

Figure 4.10: Overall conclusions



4.20 A table summarising the results for each plot is included in Appendix 1.

Conclusions

4.21 It is therefore proposed that the plots in Appendix 1 shown in green in the “consider for CEA release” column are not identified as Core Employment Areas. Some of these sites may be appropriate to bring forward as allocations within the Local Plan for other uses, which is for the Housing and Economic Land Availability Assessment to determine. Other sites may be better left as unprotected employment land, to allow flexibility to consider for release or retention through the development management process should circumstances change over the plan period.

- 4.22 The sites are listed in Appendix 1. It is worth clarifying that the columns in Appendix 1 cannot be considered in isolation. The fact that, for instance, the site is in green for one column does not mean that there is an argument in favour of its release if this is outweighed by other columns. A balanced judgement must be reached in each case, and that has been the purpose of this exercise.
- 4.23 The sites identified as “no” in the “consider for CEA release” column should generally make up the defined Core Employment Areas, wherever they can result in a credible area to protect for employment use. In general, those areas within proposed CEAs that are potentially suitable for release are fringe areas that can be excluded from the overall CEA definition without causing particular issues.
- 4.24 The following locations should therefore be identified as Core Employment Areas.

Table 4.11: Designated Core Employment Areas

Core Employment Area in Draft Local Plan	Sites in Employment Area Analysis
Green Park (EM2a)	Green Park plots 1-6
North of the M4 (EM2b)	North of the M4 plots 1-3
South of Basingstoke Road (EM2c)	Worton Grange plots 1-3; Acre Road plots 1-5
Bennet Road (EM2d)	Bennet Road plots 1-4 and 6-7; Manor Farm plot 1
North of Basingstoke Road (EM2e)	North of Basingstoke Road plots 2-11
Elgar Road (EM2f)	Elgar Road plots 1-2
Richfield Avenue (EM2g)	Richfield Avenue plots 1-5, 7-10 and 12
Portman Road (EM2h)	Portman Road/Loverock Road plots 1-11; Stadium Way/Deacon Way plots 1-7
Wigmore Lane (EM2i)	Wigmore Lane plot 1
Bridgewater Close	Bridgewater Close plot 1
Sterling Way (EM2k)	Sterling Way plot 1
Marcus Close (EM2l)	Marcus Close plot 1
Paddock Road (EM2m)	Paddock Road plot 1

5. Potential for intensification of employment areas

- 5.1 The second stated purpose of this report is to identify any potential for existing employment areas to accommodate additional employment development to help to meet the identified needs.
- 5.2 The Housing and Economic Land Availability Assessment (November 2024) identifies specific sites to accommodate part of the need for additional office development, but sufficient planning permissions exist to accommodate it in its entirety if they were to be implemented. In terms of industrial and warehousing, specific sites are identified to accommodate 125,249 sq m of floorspace, which is less than 167,113 sq m of identified need from the Central Berkshire Economic Development Needs Assessment. Therefore, there is 41,864 sq m of needs for which specific sites have not been identified.
- 5.3 This section therefore seeks to assess whether there is scope for additional development through intensification of employment use within Core Employment Areas. The various 'plots' within the Core Employment Areas were also considered within the HELAA, but the focus was on whether they could help to meet housing needs, and the scope for intensification of those sites expected to remain in employment use was not considered.
- 5.4 The existing employment areas are developed at reasonably high density, and there are very few obvious pieces of unused land within Core Employment Areas. However, there are some sites where there is some potential for intensification, and there is also some floorspace in non-employment use but in employment-type units which has the potential to revert back to employment.
- 5.5 In order to calculate the potential for intensification of employment uses within employment areas, the analysis looked at all sites that fulfilled the following criteria:
- Within Core Employment Areas, which are the locations to which the Local Plan directs industrial and warehouse development;
 - Within primarily industrial and warehouse use, as office sites are already developed at a higher density;
 - Excluding sites which have been developed within the last five years, which are considered unlikely to be significantly intensified in the plan period; and
 - Excluding sites where the HELAA anticipates an alternative development, to avoid double-counting.

The analysis calculates the existing plot ratio, i.e. the employment floorspace on site expressed as a proportion of the overall site area. Non-employment floorspace was excluded in order to reflect the potential for this to change use.

Scenario 1: HELAA pattern book

- 5.6 The HELAA already uses plot ratios as a way of calculating the potential for commercial use of a number of sites, in particular new sites proposed for employment use. For industrial and warehouse space, the HELAA uses a plot ratio of 3,450 sq m per hectare. This is the average plot ratio from a sample of new industrial and warehouse developments and permissions within the last ten years.

- 5.7 Scenario 1 assesses the potential if all sites that fulfilled the criteria in paragraph 5.5 that currently have an employment plot ratio of less than 3,450 sq m per hectare were intensified to the 3,450 figure. The results are shown in Table 6.1, and show that there is potential for an increase of industrial and warehouse floorspace of 20,605 sq m. This would be enough to eliminate around half of the need for industrial and warehouse for which sites had not been identified.

Table 5.1: Intensification potential from Scenario 1

Plot	Existing industrial/ warehouse floorspace	Potential industrial/ warehouse floorspace with HELAA plot ratios	Potential uplift (sq m)
North of the M4 plot 1	82,772	87,147	4,375
Worton Grange plot 3	6,090	9,062	2,972
Acre Road plot 2	4,390	4,589	199
Acre Road plot 5	2,993	4,451	1,458
Bennet Road plot 2	10,082	12,725	2,643
Bennet Road Plot 5	4,461	7,625	3,164
Bennet Road Plot 7	5,896	7,625	1,729
North of Basingstoke Road Plot 5	1,339	1,553	214
North of Basingstoke Road Plot 9	4,361	4,623	262
Richfield Avenue Plot 3	2,739	3,416	677
Stadium Way/Deacon Way Plot 1	2,098	2,553	455
Stadium Way/Deacon Way Plot 3	1,691	2,001	310
Stadium Way/Deacon Way Plot 6	2,808	3,588	780
Stadium Way/Deacon Way Plot 7	2,362	2,622	260
Wigmore Lane Plot 1	1,409	2,519	1,110
Total	135,491	156,096	20,605

Scenario 2: HELAA pattern book 'plus'

- 5.8 An alternative scenario involves looking at the upper end of the densities achieved in recent years rather than the average. A shortage of space to accommodate needs may well result in the need to achieve higher densities. Although sites have been permitted or developed at greater density, these tend to have specific circumstances, for instance a self-storage development at multiple storeys. More generally, a realistic high end plot ratio tends to be in the region of 4,000 to 4,500 sq m per hectare. This level has been seen for instance at permissions at Cradock Road, Worton Grange, 127a Loverock Road and Reading International Business Park (see table A3.8 of the HELAA).

5.9 Scenario 2 therefore looks at all sites with an existing employment floorspace plot ratio of less than 4,000 sq m per hectare, and calculates the potential uplift should these be developed at this level. The results are shown in Table 5.2, and show that there is potential for an increase of industrial and warehouse floorspace of 45,933 sq m. This would be more than enough to eliminate the need for industrial and warehouse for which sites had not been identified.

Table 5.2: Intensification potential from Scenario 2

Plot	Existing industrial/ warehouse floorspace	Potential industrial/ warehouse floorspace at Scenario 2	Potential uplift (sq m)
North of the M4 Plot 1	82,772	95,862	13,090
Worton Grange Plot 3	6,090	10,076	3,986
Acre Road Plot 2	4,390	5,047	657
Acre Road Plot 5	2,993	4,896	1,903
Bennet Road Plot 1	4,889	6,831	1,942
Bennet Road Plot 2	10,082	14,002	3,920
Bennet Road Plot 4	11,469	16,356	4,887
Bennet Road Plot 5	4,461	8,387	3,926
Bennet Road Plot 7	5,896	8,387	2,491
North of Basingstoke Road Plot 3	6,926	7,438	512
North of Basingstoke Road Plot 5	1,339	1,708	369
North of Basingstoke Road Plot 9	4,361	5,085	724
Elgar Road Plot 2	9,713	11,043	1,330
Richfield Avenue Plot 3	2,739	3,757	1,018
Richfield Avenue Plot 8	8,346	8,539	193
Portman Road/Loverock Road Plot 1	3,608	4,023	415
Portman Road/Loverock Road Plot 8	3,624	3,719	95
Stadium Way/Deacon Way Plot 1	2,098	2,808	710
Stadium Way/Deacon Way Plot 2	17,187	17,419	232
Stadium Way/Deacon Way Plot 3	1,691	2,201	510
Stadium Way/Deacon Way Plot 6	2,808	3,947	1,139
Stadium Way/Deacon Way Plot 7	2,362	2,884	522
Wigmore Lane Plot 1	1,409	2,770	1,361
Total	201,253	247,186	45,933

Conclusions

- 5.10 The above analysis represents a way of examining the potential for intensification within employment areas. In reality, it is highly unlikely that all sites listed above will

be intensified, and intensification may well occur on other sites. Sites listed above may not be available or achievable for intensification during the plan period, and there may be specific reasons on individual sites why intensification is not suitable, and the inclusion in the tables above does not necessarily endorse such development. Plot ratios that can be achieved are heavily dependent on the type of operation, with distribution space needing large amounts of circulation space for HGVs and achieving much lower plot ratios than, for instance, light engineering space. Therefore, this is an indication only.

- 5.11 However, in terms of the realism of the overall message, this is considered to be a reasonable analysis. It uses plot ratios for new development of 34,500 sq m and 4,000 sq m which are very much in line with the existing average plot ratio on industrial and warehouse sites in the Core Employment Areas (3,984 sq m per hectare), so it does not necessitate a step change in density. Policy EM4 of the draft Local Plan supports the redevelopment of older industrial premises within Core Employment Areas for more modern flexible employment floorspace subject to a variety of premises being maintained, and therefore the type of development envisaged here is in accordance with policy.
- 5.12 In summary therefore, table 5.3 illustrates that, taking account of both site-specific supply and potential intensification of employment areas, there is scope within the Borough to meet the identified industrial and warehouse need in full.

Table 5.3: Contribution of potential intensification to meeting needs

	Floorspace (sq m)
Identified need for industrial and warehouse space	167,113
Site-specific supply identified in HELAA	125,249
Potential intensification within employment sites	45,933
Total potential supply	171,182

6. Conclusion

- 6.1 This analysis has considered which of Reading's employment areas are of greatest importance to the economic prospects of Reading, and has therefore led to the definition of the following Core Employment Areas (CEAs) in the Local Plan. This is a proactive approach to identifying the most significant areas and avoids a blanket protection of all employment land.
- EM2a: Green Park
 - EM2b: North of the M4
 - EM2c: South of Basingstoke Road
 - EM2d: Bennet Road
 - EM2e: North of Basingstoke Road
 - EM2f: Elgar Road
 - EM2g: Richfield Avenue
 - EM2h: Portman Road
 - EM2i: Wigmore Lane
 - EM2j: Bridgewater Close
 - EM2k: Sterling Way
 - EM2l: Marcus Close
 - EM2m: Paddock Road
- 6.2 This analysis has also looked at the potential for intensification and additional development within Reading's Core Employment Areas in the context of a shortfall in site-specific supply identified by the HELAA. It concludes that, taken together, site-specific supply in the HELAA and the potential for intensification in CEAs are expected to be sufficient to meet the identified needs for industrial and warehouse space within Reading's boundaries.

Appendix 1: Full table of conclusions on plots

Table A1.1: Conclusion of assessment of each plot

Area/Plot	Internal environment	Wider environment	Strategic access	Market demand	Ownership	Development constraints	Accessibility	Sequential	Policy	Possible to release in isolation?	Consider for CEA release?	Comments
Green Park	-	-	-	-	-	-	-	-	-	-	-	-
Plot 1	No	Yes	No	No	Possibly	N/A	Possibly	No	No	Yes	No	Highly significant business park
Plot 2	No	Yes	No	No	Possibly	N/A	Possibly	No	No	Yes	No	Highly significant business park
Plot 3	No	Possibly	No	No	No	N/A	Possibly	No	No	Yes	No	Highly significant business park
Plot 4	No	Possibly	No	No	Possibly	N/A	Possibly	Possibly	No	Yes	No	Highly significant business park
Plot 5	No	Possibly	No	No	Possibly	N/A	Possibly	No	No	Yes	No	Highly significant business park
Plot 6	No	Possibly	No	No	Possibly	No	No	No	No	Yes	No	Highly significant business park
Plot 7	No	Possibly	No	No	Possibly	No	Possibly	No	No	Yes	No	Highly significant business park
North of the M4	-	-	-	-	-	-	-	-	-	-	-	-
Plot 1	No	Possibly	No	No	Possibly	N/A	Possibly	No	No	Yes	No	Highly significant employment location
Plot 2	Possibly	No	No	No	Yes	No	Possibly	No	No	No	No	Highly significant employment location
Plot 3	No	No	No	No	Possibly	N/A	Possibly	No	No	Yes	No	Highly significant employment location
Worton Grange	-	-	-	-	-	-	-	-	-	-	-	-
Plot 1	No	Possibly	No	No	Possibly	N/A	Possibly	Yes	Possibly	No	No	Highly significant employment location
Plot 2	No	Possibly	No	No	Possibly	N/A	Possibly	No	No	No	No	Highly significant employment location

Area/Plot	Internal environment	Wider environment	Strategic access	Market demand	Ownership	Development constraints	Accessibility	Sequential	Policy	Possible to release in isolation?	Consider for CEA release?	Comments
Plot 3	Yes	Possibly	No	No	No	N/A	Possibly	Yes	No	No	No	Highly significant employment location
Plot 4	No	Yes	No	Possibly	No	N/A	Possibly	Yes	No	Yes	No	Highly significant employment location
Acre Road	-	-	-	-	-	-	-	-	-	-	-	-
Plot 1	Possibly	Possibly	No	Possibly	Possibly	N/A	Possibly	Yes	No	No	No	Highly significant employment location
Plot 2	Yes	Possibly	No	No	Possibly	N/A	Possibly	Yes	No	No	No	Highly significant employment location
Plot 3	Possibly	Possibly	No	No	Possibly	N/A	Possibly	Possibly	No	No	No	Highly significant employment location
Plot 4	Possibly	Possibly	No	No	Possibly	N/A	Possibly	Yes	No	No	No	Highly significant employment location
Plot 5	No	Possibly	No	No	Possibly	N/A	Possibly	No	No	No	No	Highly significant employment location
Bennet Road	-	-	-	-	-	-	-	-	-	-	-	-
Plot 1	Possibly	Possibly	No	No	Possibly	N/A	Possibly	Yes	No	No	No	Highly significant employment location
Plot 2	Possibly	No	No	No	Possibly	N/A	Possibly	No	No	No	No	Highly significant employment location
Plot 3	Possibly	No	No	No	Possibly	N/A	Possibly	Yes	Yes	No	No	Highly significant employment location
Plot 4	Possibly	No	No	No	Possibly	N/A	Possibly	Yes	Possibly	No	No	Highly significant employment location
Plot 5	Possibly	No	No	No	No	N/A	Yes	Yes	Possibly	Yes	Yes	Could be considered for release
Plot 6	Yes	No	No	No	Possibly	N/A	Possibly	Yes	No	No	No	Highly significant employment location
Plot 7	Possibly	No	No	No	Possibly	N/A	Possibly	Yes	Possibly	No	No	Highly significant employment location

Area/Plot	Internal environment	Wider environment	Strategic access	Market demand	Ownership	Development constraints	Accessibility	Sequential	Policy	Possible to release in isolation?	Consider for CEA release?	Comments
Manor Farm	-	-	-	-	-	-	-	-	-	-	-	-
Plot 1	Possibly	Yes	Possibly	No	Possibly	N/A	Possibly	Yes	No	Yes	No	Loss of major employer is overriding
Plot 2	Possibly	Possibly	Possibly	Yes	Possibly	N/A	Possibly	Yes	Possibly	No	Yes	Consider as part of a wider release
Plot 3	Possibly	Possibly	Possibly	Possibly	Possibly	N/A	Possibly	Yes	Possibly	No	Yes	Consider as part of a wider release
Plot 4	Yes	Yes	Possibly	Possibly	Possibly	N/A	Possibly	Yes	Yes	No	Yes	Consider as part of a wider release
Plot 5	Possibly	Possibly	Possibly	Yes	Possibly	N/A	Possibly	Yes	Yes	No	Yes	Consider as part of a wider release
Plot 6	Yes	Possibly	Possibly	Possibly	Possibly	N/A	Possibly	Yes	Possibly	No	Yes	Consider as part of a wider release
Plot 7	Possibly	Possibly	Possibly	Possibly	Possibly	N/A	Possibly	Yes	No	No	Yes	Possibly release if small units replaced
Plot 8	Possibly	Possibly	Possibly	Possibly	Possibly	N/A	Possibly	Yes	Possibly	No	Yes	Consider as part of a wider release
North of Basingstoke Road	-	-	-	-	-	-	-	-	-	-	-	-
Plot 1	Yes	Possibly	Possibly	Possibly	Possibly	N/A	Possibly	Yes	Possibly	Yes	Yes	Consider as part of a wider release
Plot 2	Possibly	Possibly	Possibly	No	Possibly	N/A	Possibly	Yes	Possibly	No	No	Significant employment land
Plot 3	Possibly	No	Possibly	No	Possibly	N/A	Possibly	Yes	Possibly	No	No	Significant employment land
Plot 4	No	Possibly	Possibly	No	Possibly	N/A	Possibly	Possibly	No	No	No	Significant employment land
Plot 5	Yes	Yes	Possibly	No	Possibly	N/A	Possibly	Yes	Possibly	No	No	Significant employment land
Plot 6	Yes	No	Possibly	No	Possibly	N/A	Possibly	Yes	No	No	No	Significant employment land
Plot 7	Yes	No	Possibly	No	Possibly	N/A	Possibly	Yes	No	No	No	Significant employment land
Plot 8	Yes	Possibly	Possibly	No	Possibly	N/A	Possibly	Possibly	No	No	No	Significant employment land
Plot 9	Yes	Possibly	Possibly	No	Possibly	N/A	Possibly	Yes	No	No	No	Significant employment land

Area/Plot	Internal environment	Wider environment	Strategic access	Market demand	Ownership	Development constraints	Accessibility	Sequential	Policy	Possible to release in isolation?	Consider for CEA release?	Comments
Plot 10	Possibly	No	No	No	Possibly	N/A	Possibly	Yes	Yes	No	No	Significant employment land
Plot 11	Yes	Possibly	No	No	Possibly	N/A	Possibly	Yes	Possibly	No	No	Significant employment land
Plot 12	Yes	Yes	Possibly	Possibly	Possibly	N/A	Possibly	Yes	Possibly	Yes	Yes	No major constraints
Elgar Road	-	-	-	-	-	-	-	-	-	-	-	-
Plot 1	Yes	Possibly	Possibly	Possibly	Possibly	N/A	Possibly	Yes	No	Yes	No	Small/medium units issue overriding
Plot 2	Yes	Possibly	Possibly	Possibly	Possibly	N/A	No	Yes	No	Yes	No	Small/medium units issue overriding
Plot 3	Possibly	Yes	Possibly	Possibly	Possibly	N/A	Possibly	Yes	Possibly	Yes	Yes	No major constraints
Island Road	-	-	-	-	-	-	-	-	-	-	-	-
Plot 1	No	No	No	No	No	N/A	Possibly	No	No	Yes	No	Highly significant employment location
Plot 2	Possibly	No	No	Possibly	Yes	No	Possibly	Yes	No	Yes	No	Highly significant employment location
Plot 3	No	No	No	No	No	N/A	Possibly	No	No	No	No	Highly significant employment location
Rose Kiln Lane	-	-	-	-	-	-	-	-	-	-	-	-
Plot 1	Yes	Possibly	Possibly	No	Possibly	N/A	No	Possibly	Possibly	Yes	Yes	Consider for exclusion from CEA
Plot 2	Possibly	No	Possibly	Yes	Possibly	N/A	No	Possibly	Yes	Yes	Yes	Consider for exclusion from CEA
Plot 3	Possibly	Possibly	Possibly	No	Possibly	N/A	No	Possibly	Yes	No	Yes	Consider for release from employment use
Plot 4	Possibly	Possibly	Possibly	No	Possibly	N/A	Possibly	No	No	No	No	Too many constraints to take further
Plot 5	Possibly	Possibly	Possibly	No	Possibly	N/A	Possibly	No	Possibly	No	Yes	Consider for exclusion from CEA
Plot 6	Possibly	Possibly	Possibly	No	Yes	N/A	Possibly	No	Yes	No	Yes	Consider for exclusion from CEA
Plot 7	Possibly	No	Possibly	Yes	Yes	N/A	Possibly	Possibly	Yes	Yes	Yes	Consider for release from employment use

[illegible]

Area/Plot	Internal environment	Wider environment	Strategic access	Market demand	Ownership	Development constraints	Accessibility	Sequential	Policy	Possible to release in isolation?	Consider for CEA release?	Comments
Plot 1	Yes	Possibly	Yes	Possibly	Possibly	N/A	No	No	Possibly	No	No	Too many constraints to take further
Plot 2	Yes	Possibly	Yes	Possibly	Possibly	N/A	No	Possibly	No	No	No	Policy issues overriding here
Plot 3	Yes	No	Yes	Possibly	Possibly	N/A	No	Possibly	No	No	No	Policy issues overriding here
Plot 4	Yes	No	Yes	Possibly	Possibly	N/A	No	Yes	No	No	No	Policy issues overriding here
Plot 5	Possibly	No	Yes	Possibly	Possibly	N/A	Possibly	Yes	Possibly	No	No	Not possible to release in isolation
Plot 6	Yes	No	Yes	Possibly	Possibly	N/A	No	Yes	No	No	No	Policy issues overriding here
Plot 7	Yes	No	Yes	Possibly	Possibly	N/A	Possibly	Yes	No	No	No	Policy issues overriding here
Plot 8	Yes	Possibly	Yes	Possibly	Possibly	N/A	Possibly	Yes	No	No	No	Policy issues overriding here
Plot 9	Yes	No	Yes	Possibly	Possibly	N/A	Possibly	Yes	No	No	No	Policy issues overriding here
Plot 10	Possibly	Possibly	Yes	Possibly	Possibly	N/A	Possibly	Yes	No	No	No	Policy issues overriding here
Plot 11	Possibly	No	Yes	Possibly	Possibly	N/A	Possibly	Yes	Possibly	No	No	Not possible to release in isolation
Stadium Way/ Deacon Way	-	-	-	-	-	-	-	-	-	-	-	-
Plot 1	Possibly	Possibly	Yes	Possibly	Possibly	N/A	Possibly	No	Possibly	No	No	Not possible to release in isolation
Plot 2	Possibly	Possibly	Yes	Possibly	Possibly	N/A	Possibly	No	Possibly	No	No	Not possible to release in isolation
Plot 3	Possibly	Possibly	Yes	Possibly	Possibly	N/A	Possibly	Possibly	Possibly	No	No	Not possible to release in isolation
Plot 4	Possibly	Possibly	Yes	No	Possibly	N/A	Possibly	Possibly	No	No	No	Policy issues overriding here
Plot 5	Yes	Possibly	Yes	Possibly	Possibly	N/A	Possibly	Possibly	No	No	No	Policy issues overriding here
Plot 6	Possibly	Possibly	Yes	Possibly	Possibly	N/A	Possibly	Yes	No	No	No	Policy issues overriding here
Plot 7	Possibly	Possibly	Yes	Possibly	Possibly	N/A	No	Yes	No	No	No	Policy issues overriding here
Bridgewater Close	-	-	-	-	-	-	-	-	-	-	-	-
Plot 1	Yes	Yes	Yes	Possibly	Possibly	N/A	No	Possibly	No	Yes	No	Policy issues overriding here

Area/Plot	Internal environment	Wider environment	Strategic access	Market demand	Ownership	Development constraints	Accessibility	Sequential	Policy	Possible to release in isolation?	Consider for CEA release?	Comments
Wigmore Lane	-	-	-	-	-	-	-	-	-	-	-	-
Plot 1	Yes	Possibly	Yes	Possibly	Possibly	N/A	Possibly	No	Possibly	Yes	No	Site isolated and outside settlement
Sterling Way	-	-	-	-	-	-	-	-	-	-	-	-
Plot 1	Yes	Yes	Yes	Possibly	Possibly	N/A	No	Yes	No	Yes	No	Policy issues overriding here
Marcus Close	-	-	-	-	-	-	-	-	-	-	-	-
Plot 1	Yes	Yes	Yes	Possibly	Possibly	N/A	No	Yes	No	Yes	No	Policy issues overriding here
Fobney Mead	-	-	-	-	-	-	-	-	-	-	-	-
Plot 1	Possibly	Possibly	Possibly	Yes	Yes	N/A	Yes	No	Yes	Yes	Yes	Consider for release to non-housing
Gosbrook Road	-	-	-	-	-	-	-	-	-	-	-	-
Plot 1	Yes	Yes	Yes	Yes	Possibly	N/A	Possibly	No	Possibly	Yes	Yes	No need to protect as employment land
Plot 2	Yes	Yes	Yes	Yes	Possibly	N/A	Possibly	No	Possibly	Yes	Yes	No need to protect as employment land
Plot 3	Yes	Yes	Yes	Possibly	Possibly	N/A	Possibly	No	Possibly	Yes	Yes	No need to protect as employment land

Appendix 2: Maps of plots used for analysis

Figure A2.1: Green Park plots

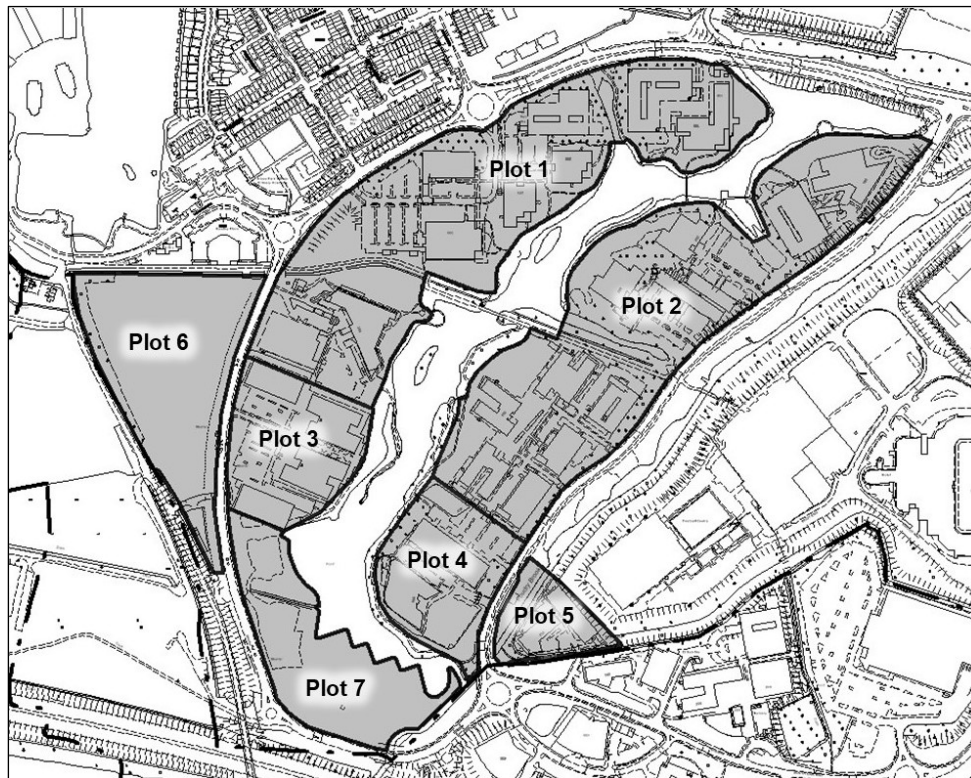


Figure A2.2: North of the M4 plots

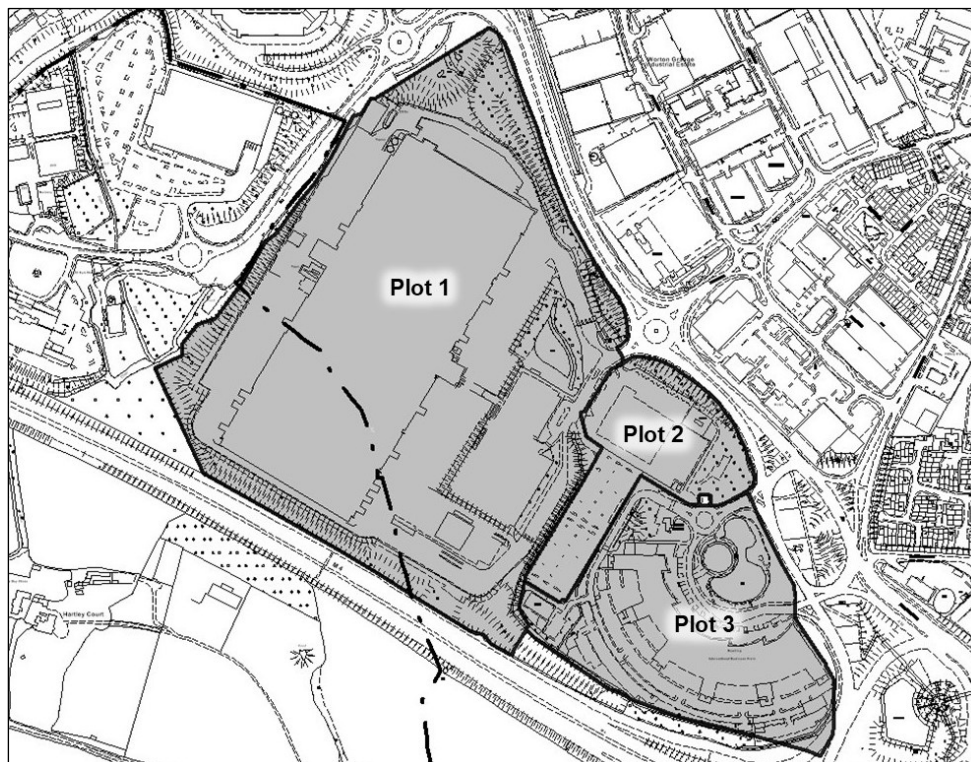


Figure A2.3: Worton Grange plots

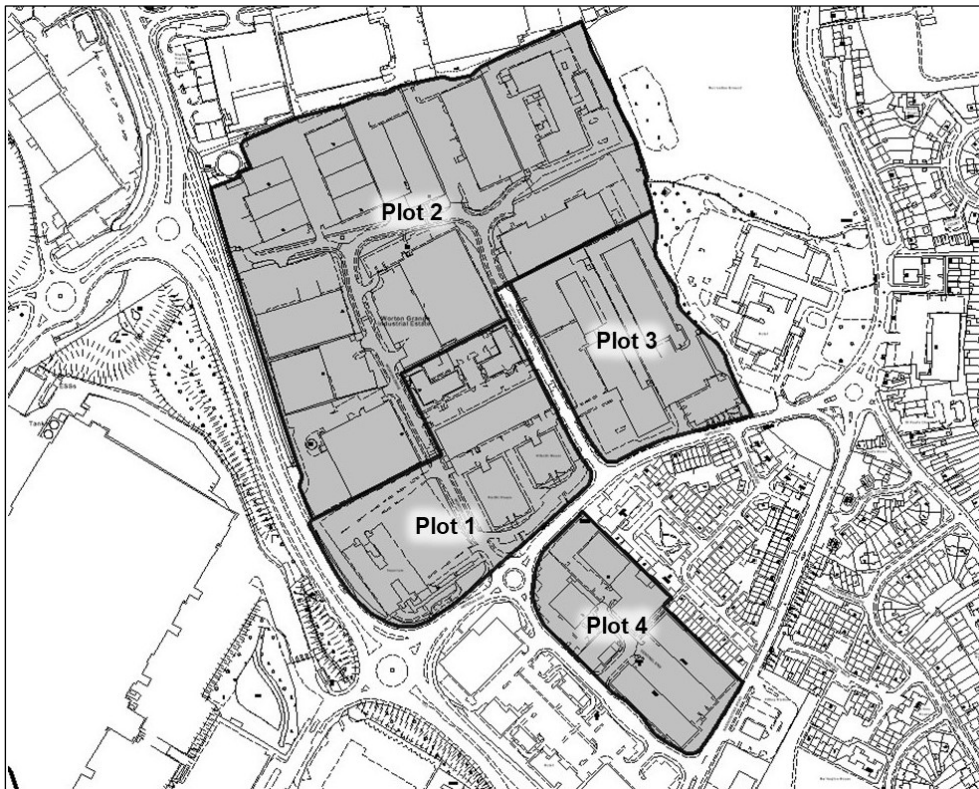


Figure A2.4: Acre Road plots

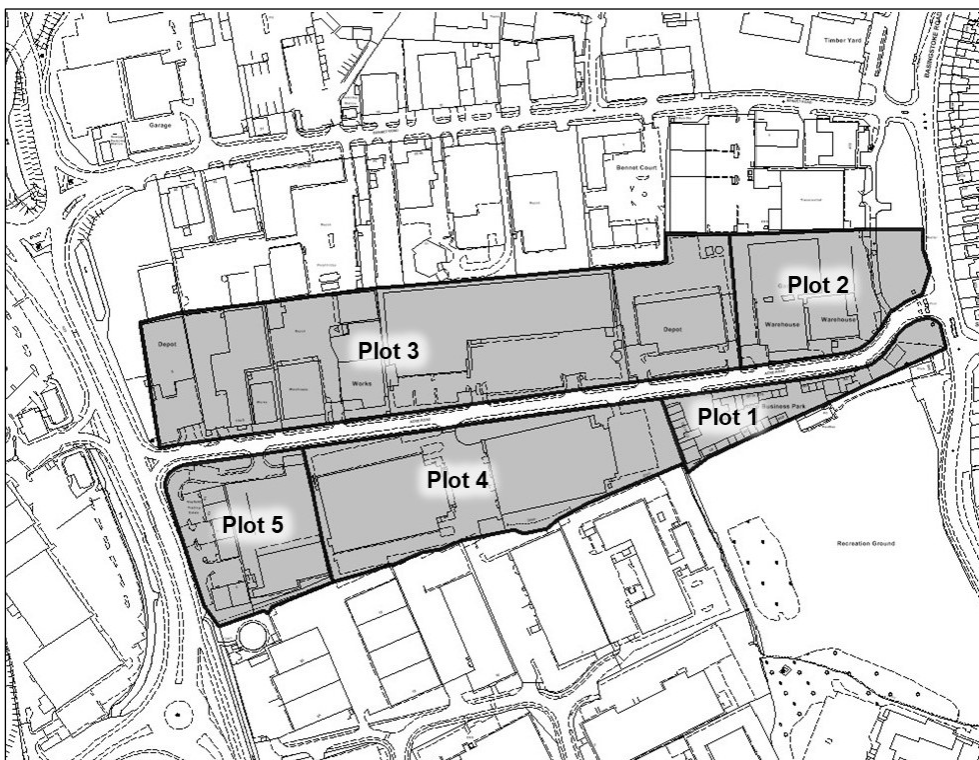


Figure A2.5: Bennet Road plots

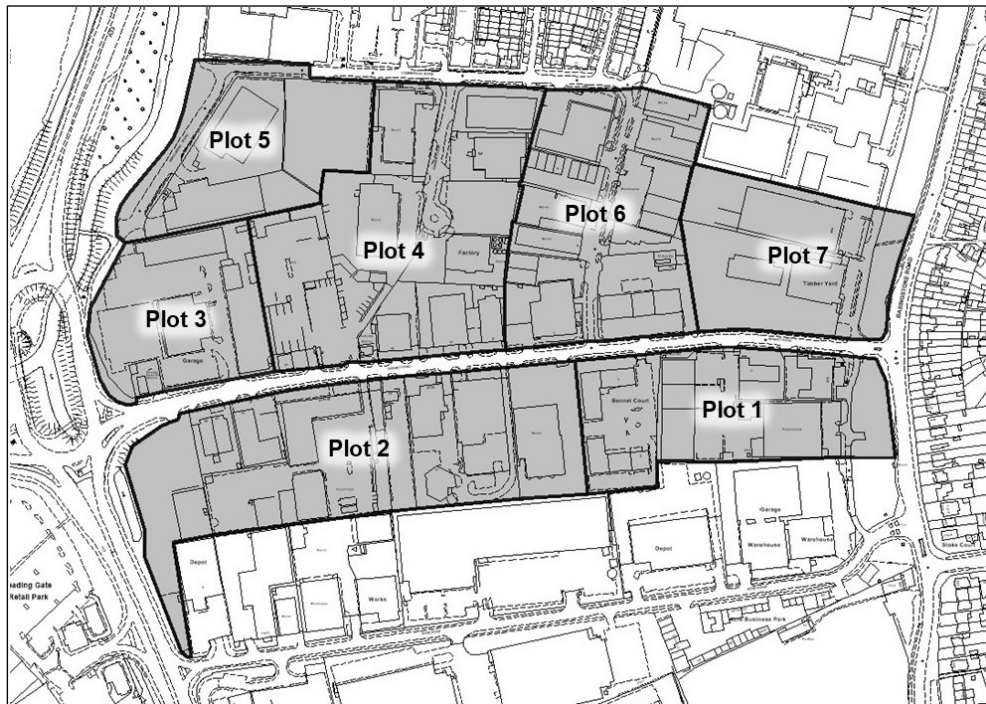


Figure A2.6: Manor Farm plots

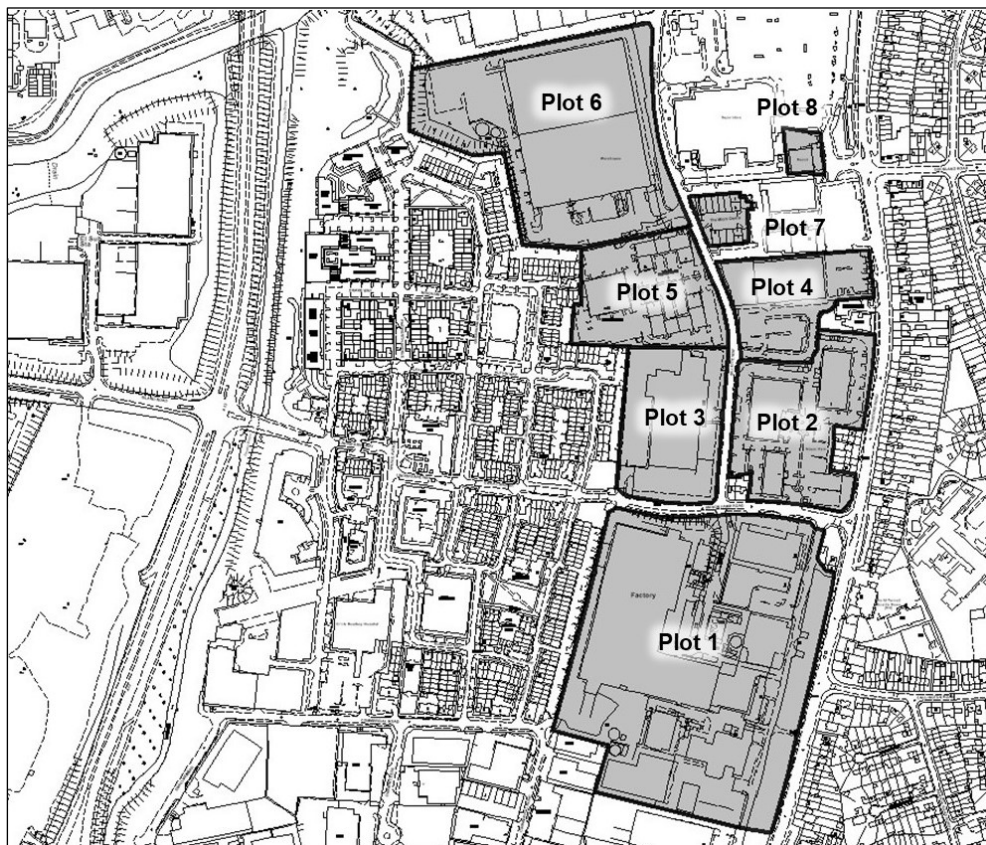


Figure A2.7: North of Basingstoke Road plots

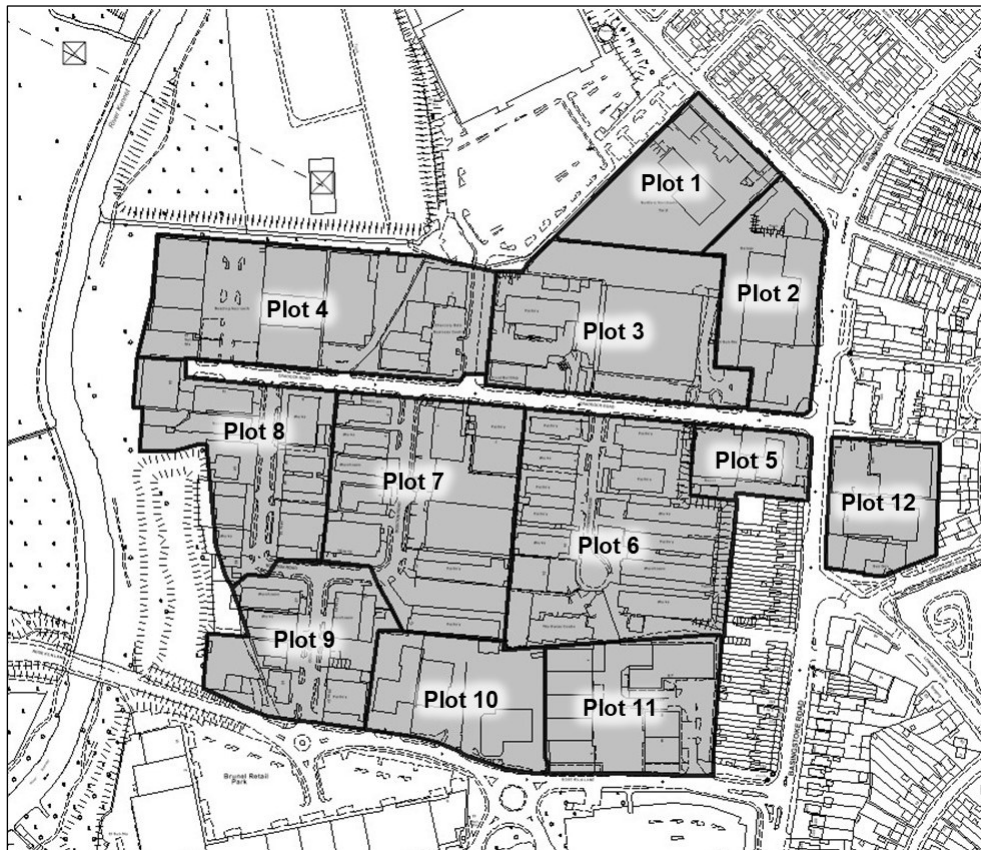


Figure A2.8: Elgar Road plots

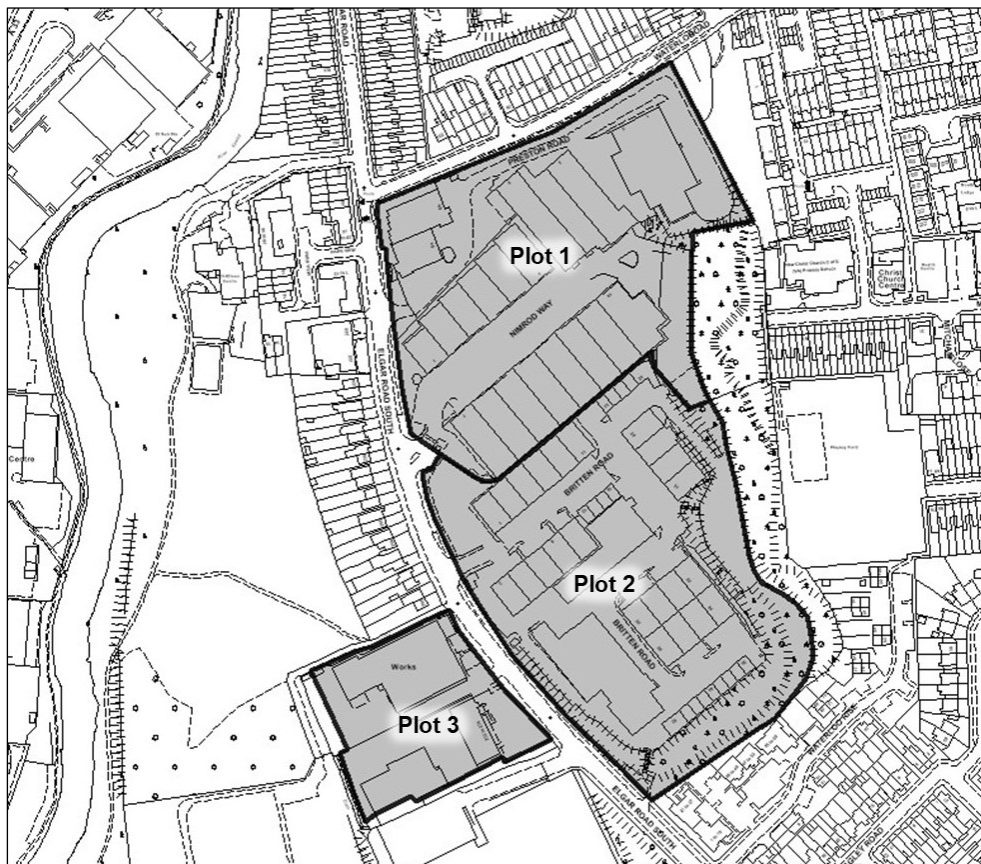


Figure A2.9: Island Road plots

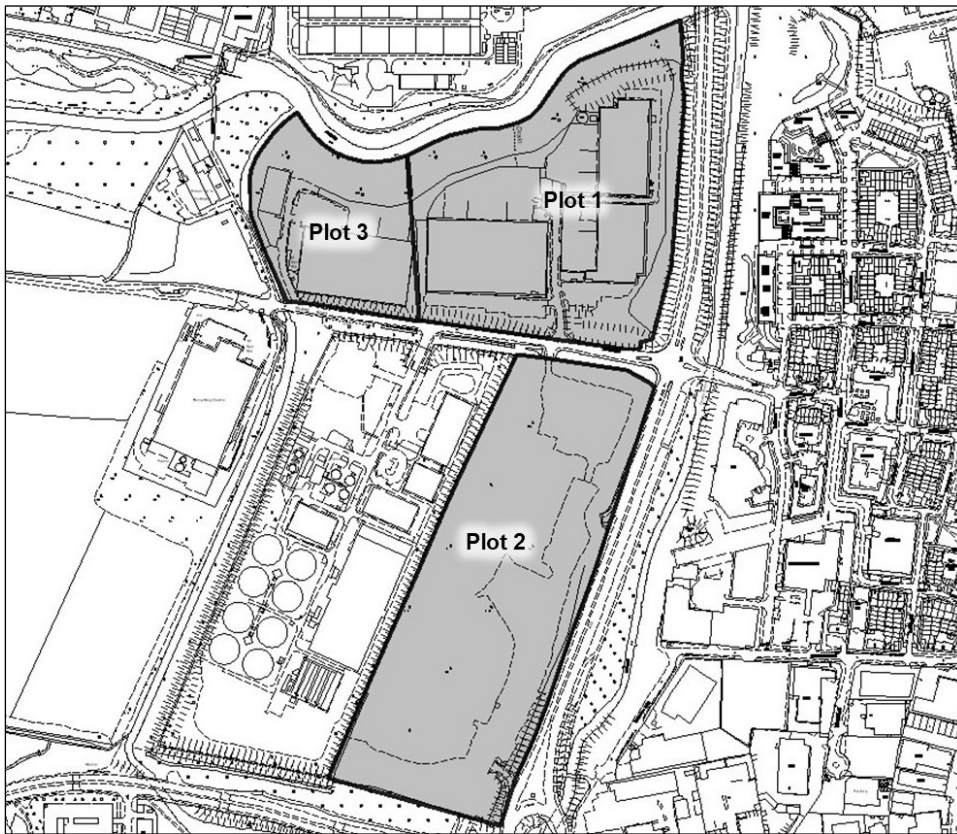


Figure A2.10: Rose Kiln Lane plots

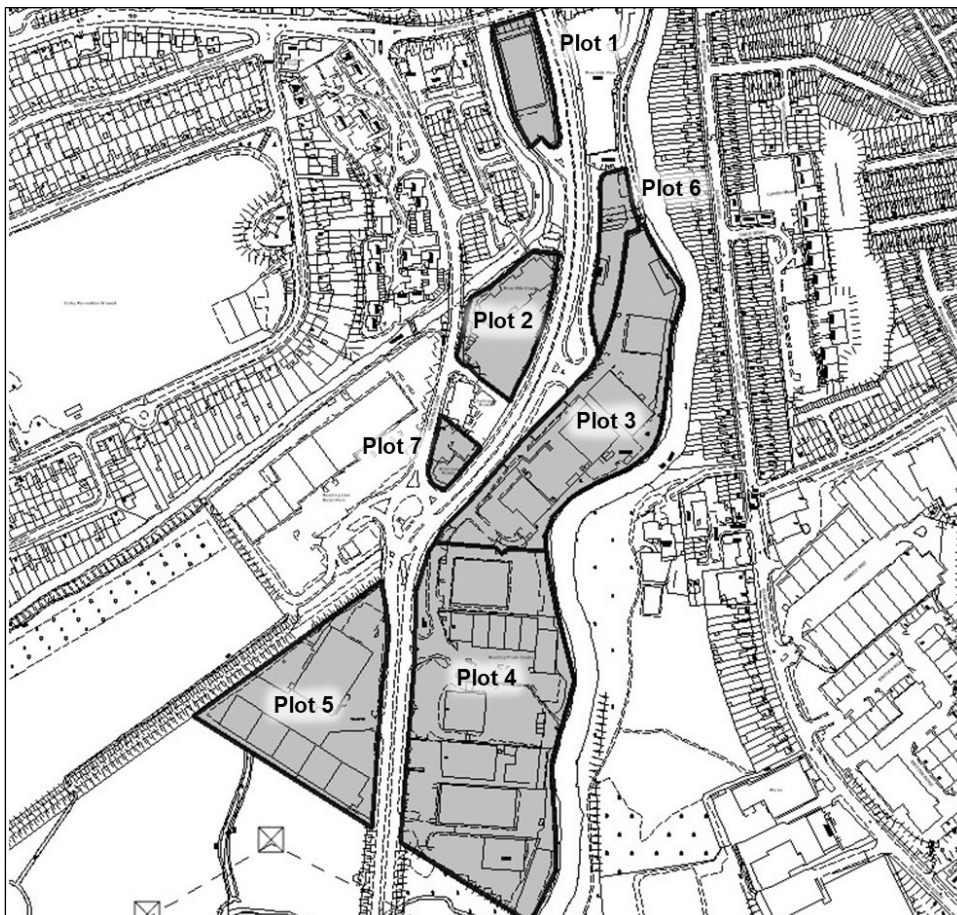


Figure A2.11: Paddock Road plots

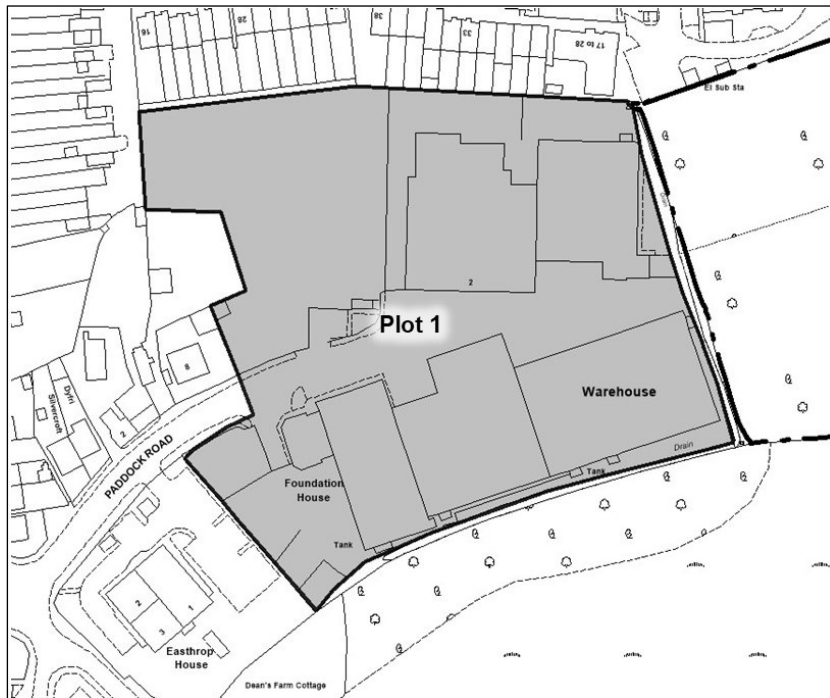


Figure A2.12: Richfield Avenue plots

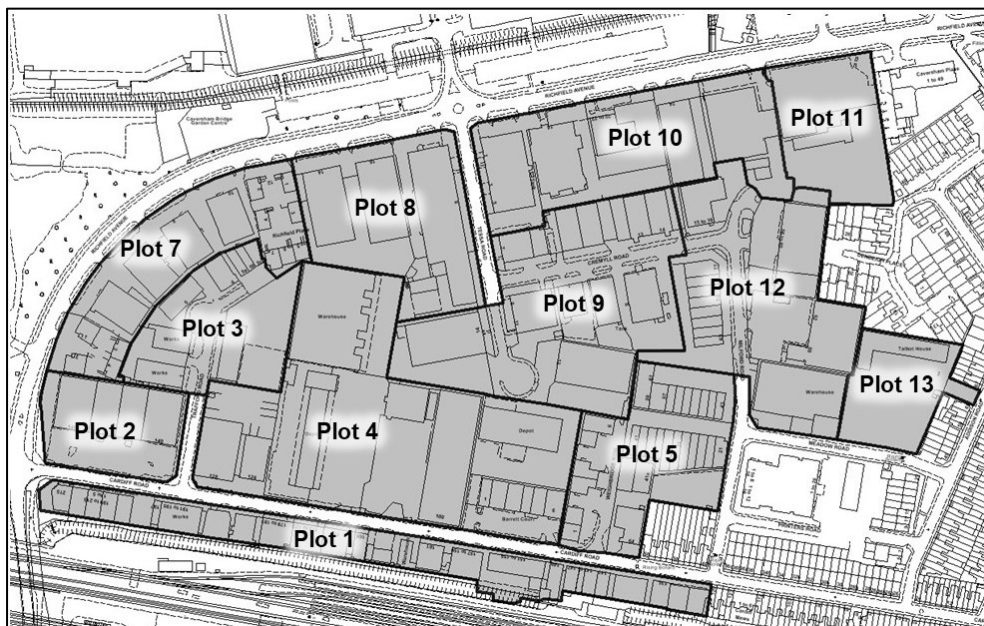


Figure A2.13: Portman Road/Loverock Road plots

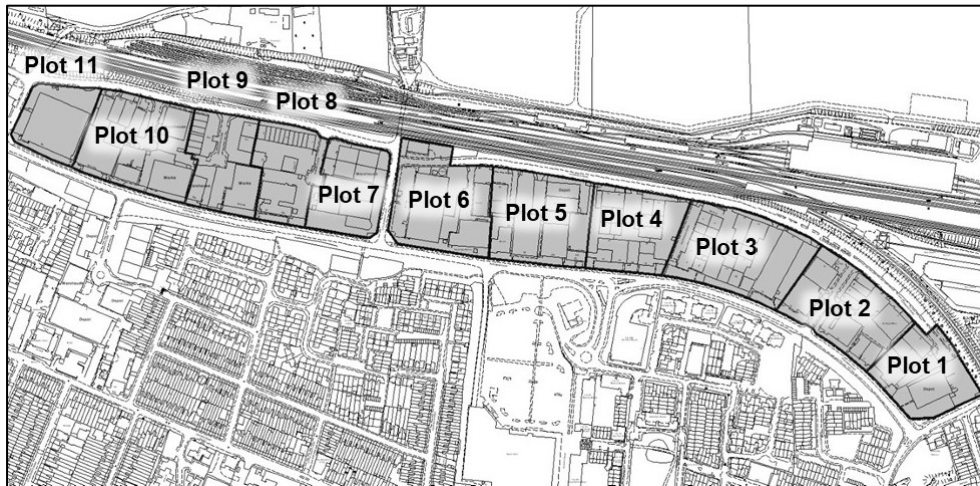


Figure A2.14: Stadium Way/Deacon Way plots

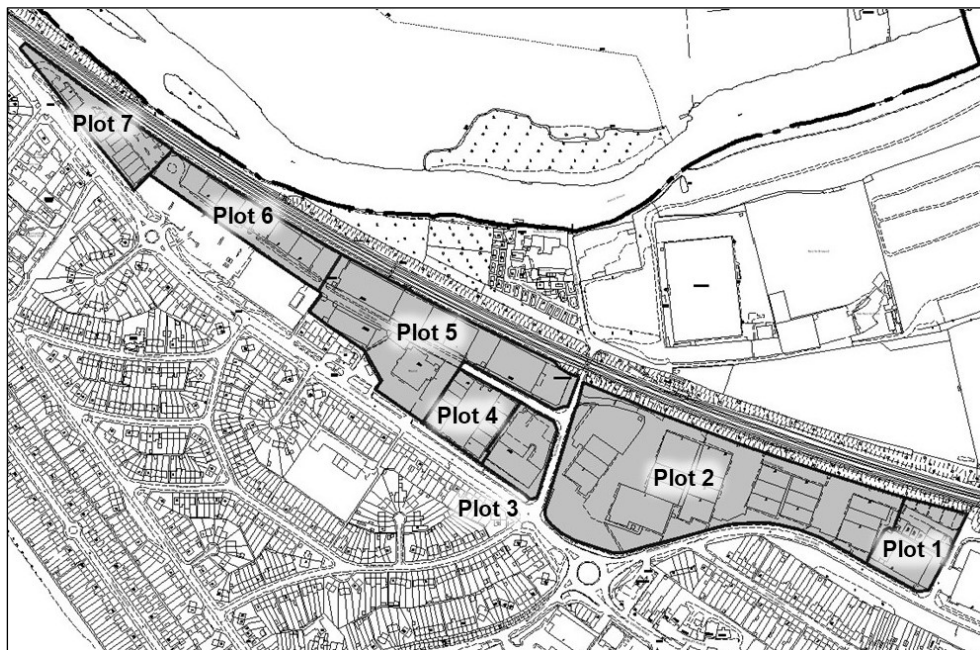


Figure A2.15: Bridgewater Close plots

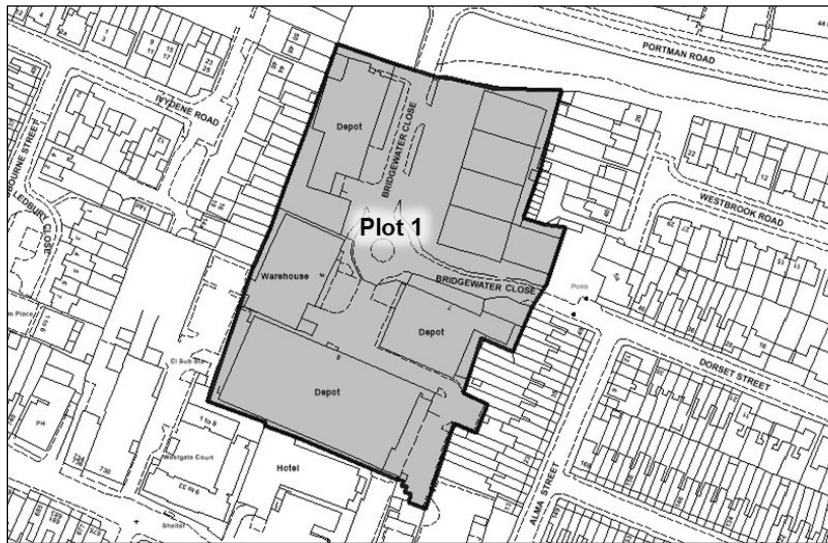


Figure A2.16: Wigmore Lane plots

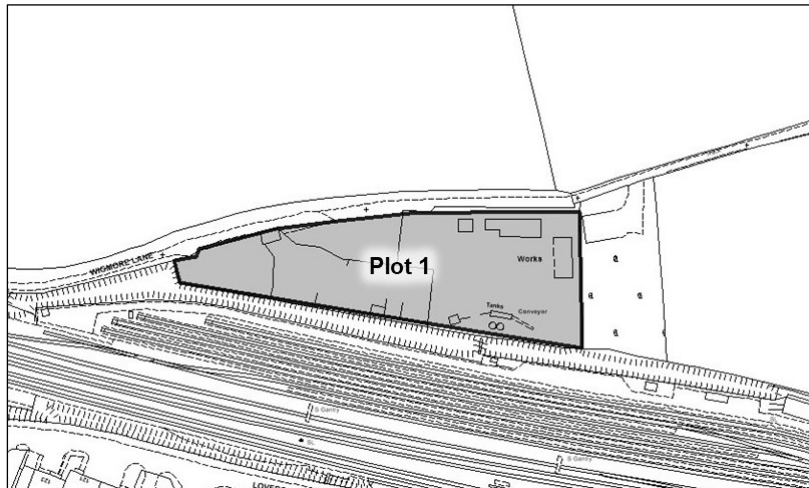


Figure A2.17: Sterling Way plots

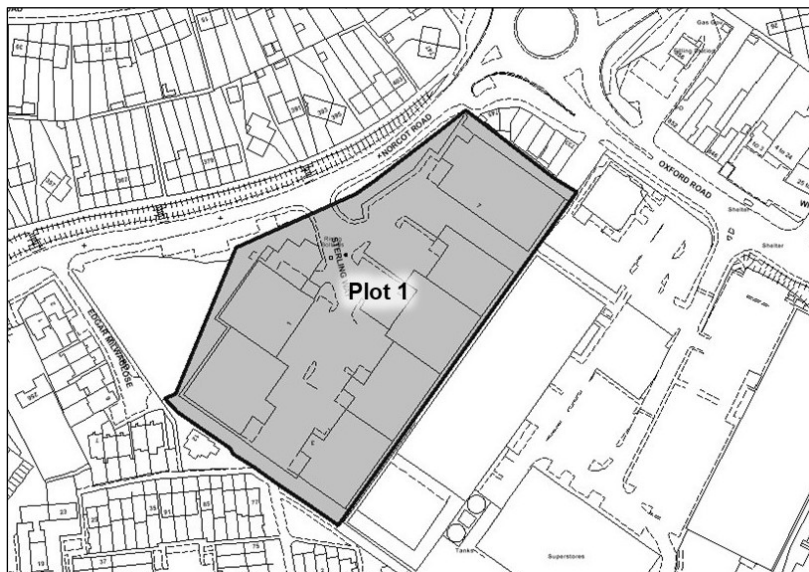


Figure A2.18: Marcus Close plots

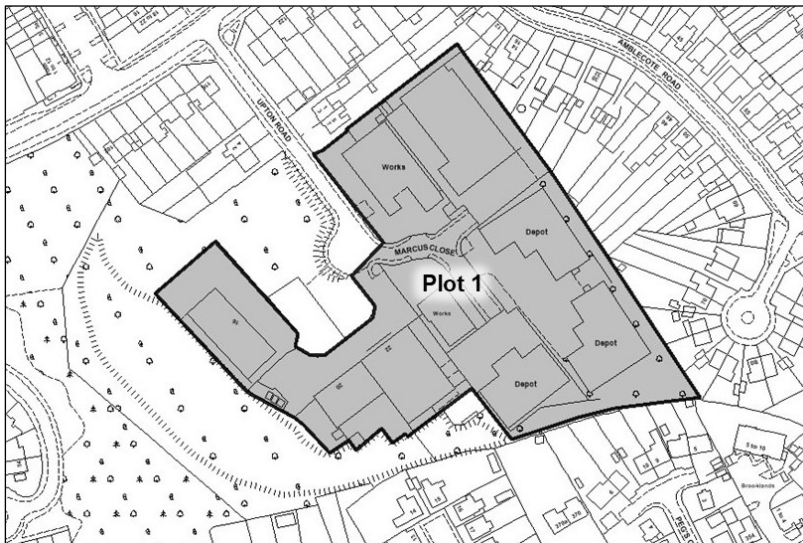


Figure A2.19: Fobney Mead plots

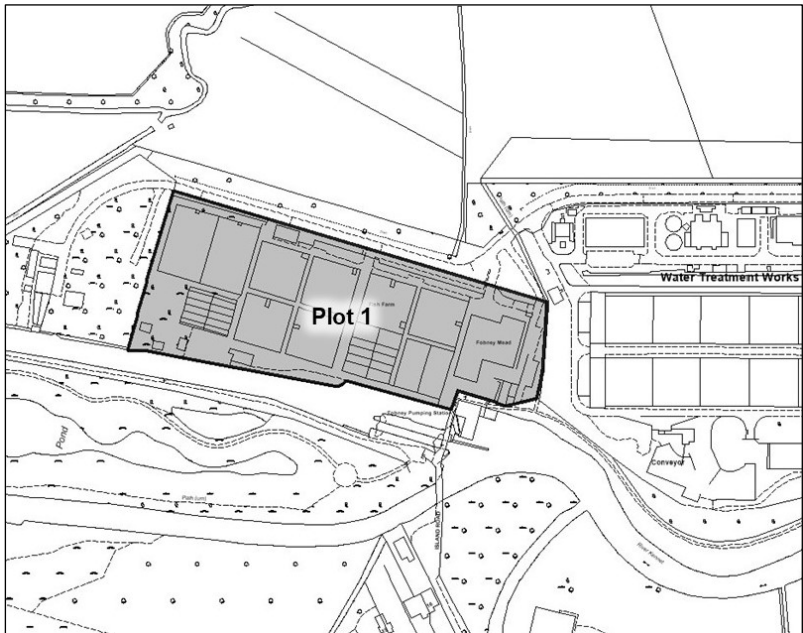


Figure A2.20: Gosbrook Road plots

