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LICHFIELD DISTRICT

GENERAL EMPLOYMENT, EXISTING ESTATES AND LAND ALLOCATIONS

A MARKET ASSESSMENT

AS AT

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1 BRIEF

- 1.1 The brief of this assessment has two principal aims. These are to appraise:-
- the suitability of existing employment estates within Lichfield District; and
 - the supply of general employment land allocations within the District in contributing to the District's employment land portfolio.
- 1.2 The Preferred Options to Regional Spatial Strategy Phase 2 Review provide a quantitative and qualitative context to employment land supply for the District. This requires a continual reservoir of 33 hectares (82 acres) of employment development land immediately available at any given time. In addition, up to 2026, 99 hectares (245 acres) of employment development land should be identifiable.
- 1.3 The principal purpose of the report is to inform the preparation of the Local Development Framework (LDF). Specifically, this report will assist the preparation of an Employment Topic Paper. As such, it will form part of the evidence base to the preparation of the LDF.
- 1.4 The scope of the report is to build upon the information provided by the Employment Land Review (December 2007). Therefore, the report seeks to provide a **market** based assessment, covering the quality and future potential of the existing and allocated significant employment locations within the District.
- 1.5 The brief requires some specific areas and issues to be examined. These are summarised below:-
- Assess those estates identified by the Employment Land Review which are difficult to let and/or are dated and examine critically their future use for employment purposes.
 - Consider if there is a potential over provision of employment development land or conversely a shortage and, if so, where and of what type.

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- Consider the “traffic light” analysis of employment land undertaken by the District Council and comment where certain estates are vulnerable to alternative land use and/or are still suitable to continue in employment use.
- 1.6 The “Traffic Light ” analysis of employment land has not been published. It can be found in Appendix 1.
- 1.7 The brief requires three outcomes. These are:-
- An **overview** of the position of Lichfield District in the general employment market and an assessment of the longer term market potential for employment, including identification, where necessary, potential in particular market sectors.
 - A **review** of the employment land review based upon a market assessment, with recommendations on the long term future of the identified existing employment estates and allocated employment sites.
 - Consideration of the **portfolio of employment land** to meet the five year and long term employment land requirement of 99 hectares (245 acres) as specified in the Preferred Options to the Phase 2 Revision to Regional Spatial Strategy, and to make recommendations whether any further employment allocations need to be made, including advice on appropriate locations.

2 METHODOLOGY

2.1 The methodology to this report was agreed with officers of the District Council following an inception meeting held on 22 July 2008. This methodology was set out in the original proposal letter, dated 20 June 2008, and is set out below.

Overview

- Assess and advise on the current regional property markets for industrial, trade and distribution units.
- Assess where Lichfield sits within this context, including its strengths and weaknesses.
- Consider recent development activity in the District.
- Project potential medium and longer term changes in the relevant regional property markets and assess how this will impact upon Lichfield.

Review

- Review information contained on sites, both existing and allocated, in the Employment Land Review (December 2007) and the "traffic light" analysis.
- Inspect all existing estates and allocated sites.
- Produce a "snapshot" of supply of vacant industrial property, employing the latest Employment Land Bulletin, the King Sturge property database, a board check and liaison with local agents.
- Analyse this "snapshot" to explain themes and identify qualitative abnormalities (by location, situation, size, type and condition).
- Compare this snapshot with previous Employment Land Bulletins and identify trends.
- Comment on how existing estates meet demand.
- Identify existing estates that struggle to attract occupiers and establish why.
- Review whether any remedial action could be taken with struggling estates or whether alternative use should be considered.
- Review marketability of all allocated sites in the context of recent development activity and projected demand.

- Consider whether all allocated land is deliverable and review timescale (within five years?)
- Consider if further allocations need to be made and, if so, where and what type.

Consideration of portfolio of land

- Make recommendations on the basis of the findings of the overview and review of existing estates and allocated land, as set out above.

- 2.2 These broad headings reflect the principal outcomes of the report, as set out by the brief. The following sections summarise the principal findings in respect of each outcome in turn.
- 2.3 In delivering the actions under the heading of overview, we have used our own market experience and knowledge, and the wider information available from our Research Centre based both in London and in Birmingham.
- 2.4 This exercise has been supported by a structured interview with Carl Durrant, a Partner in the Birmingham office of King Sturge, on 15 September 2008. Carl Durrant heads the Industrial Agency Department of the Birmingham office of King Sturge and has been an active agent in the West Midlands, including Staffordshire, over the last twenty years.
- 2.5 The review of supply and demand has sought to add to, rather than replicate, the information provided in the Employment Land Review and the “traffic light” analysis. At all times, we have sought to provide a market, rather than planning based, perspective in terms of the existing employment land and allocated employment sites.
- 2.6 The survey work, referred to above, has been carried out by qualified development surveyors, Laura Singer and Oliver Forster, over the months of August and September. This has involved liaison, where necessary, with local agents that are marketing industrial premises and land within the District.
- 2.7 This process has been informed further by a structured interview with Andrew Buckman of Kingston CPC, who is based in Lichfield. Kingston CPC are the

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predominant agents working the Lichfield office and industrial property market. The interview with Andrew Buckman was held on 2 September 2008.

3 OVERVIEW OF PREVAILING MARKET CONDITIONS

National and Regional Context

National Trends

- 3.1 The extent of available industrial floor space across the UK is at its highest levels since the recession of 1992 and 1993. This is illustrated by Chart 1: Available Industrial Floor Space in the Executive Summary to the latest UK Industrial and Distribution Floor Space Today survey carried out by this Practice (September 2008). A copy of this Executive Summary can be found in **Appendix 2**.
- 3.2 From December 2007 to June 2008 (the last survey period), available industrial floor space has increased to 21.527 million m² (232 million ft²) across Britain. This is part of an overall rising trend stretching back to the year 2000, despite stable growth achieved by the UK economy over the last 10 years.
- 3.3 The availability of large levels of industrial floor space, despite a diminishing stock (because of pressures for alternative development – namely housing), reflects long term structural changes in our economy from manufacturing to services. These structural changes are well documented and referred to in the Employment Land Review (December 2007). However, the extent of the transition, and the implications in terms of spatial property, are less well understood.
- 3.4 The extent of changes are illustrated by statistics produced by Cambridge Econometrics on employment levels in the principal sectors of the economy in the UK and the West Midlands region. These statistics come from the most recent Regional Economic Prospects Survey published by Cambridge Econometrics (July 2008). This survey provides the economic modelling service for both commercial and Government users and is perceived to be one of the most comprehensive and detailed monitors of the UK economy.
- 3.5 These figures look back to 1980 and project forward to 2020. These statistics, broken down by sectors, are presented in **Appendix 3**. Table 1 below summarises the recent and projected changes in the UK in the manufacturing and service sectors over this period.

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**Table 1 – Employment in the UK by Sector
Figures for Employment (000s)**

	2000	2008	% from 2000 to 2008	Forecast for 2020	% change from 2008 to 2020
Manufacturing	4,221	3,146	-25.5	2,602	-17.3
Services	22,662	25,493	+12.5	28,415	+11.5

Source: Cambridge Econometrics Regional Prospects Survey (July 2008)

- 3.6 Whilst there are regional variations, the decline in manufacturing in the UK from 2000 to 2008, at 25.5%, is dramatic. Similarly, the projected percentage change from 2008 to 2020 of 17.3% is also significant. Conversely, there are substantial gains in employment in the service sector.
- 3.7 It would be an over simplification to assume that all this growth will be accommodated within offices and business space premises. For example, a large number of service operations are carried out in industrial or distribution type property. Indeed this trend was noted by Carl Durrant, on interview. A note of this interview forms **Appendix 4**. In addition, there will be specialist buildings such as schools and hospitals, whilst many industrial processes are far more automated and have a reduced requirement in terms of labour.
- 3.8 Nevertheless, the magnitude of the projected reduction in employment in manufacturing and the increased employment in the service sectors will almost inevitably lead to long term growth in the demand for office and business space floor space. Similarly, there will be a corresponding reduction in the demand for industrial buildings for manufacture, although this will be compensated to a certain extent, in locations well connected to the national motorway network, by demand for new distribution facilities. The growth of new distribution buildings, particularly on large sites, has increasingly become its own market sector.
- 3.9 As for distribution, the requirements of occupiers in the growing office and business space sector will have stringent requirements as to property location and building design. From research that we have undertaken – Office Building Design and Location; The Human Impact - 2003 - it is clear that demand, particularly for large scale premises, is likely to be polarised in established city or town centres and purpose built business parks. This is because these locations can offer the services,

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facilities and environment required to attract a skilled workforce. As the economy nears full employment, the decisions of companies where to locate become increasingly important if they wish to attract the right staff.

Regional Trends

- 3.10 The availability of industrial floor space in the West Midlands reflects the overall position in the UK. The relevant extract from the latest UK Industrial & Distribution Floor Space Today survey (September 2008) published by this practice can be found in **Appendix 5**.
- 3.11 The latest survey shows that available floorspace levels since the previous survey have very slightly decreased. However, over the last two years the amount of available floorspace in the West Midlands has increased by about 20%. In addition, the level of available property is greater than at any time over the last 10 years and is almost twice as much as in 1997.
- 3.12 Analysis of employment in the region, by Cambridge Econometrics, reflects also the national picture. Statistics from the July 2008 survey are provided in **Appendix 6**. Table 2 below summarises the recent and projected changes in the West Midlands in the same sectors referred to in Table 1 from 2000 to 2020.

**Table 2 – Employment in the West Midlands by Sector
Figures for Employment (000s)**

	2000	2008	% from 2000 to 2008	Forecast for 2020	% change from 2008 to 2020
Manufacturing	536	355	-33.8	296	-16.6
Services	1,820	2,080	+14.3	2,302	+10.7

Source: Cambridge Econometrics Regional Prospects Survey (July 2008)

- 3.13 The reduction in manufacturing in the West Midlands in the period from 2000 to 2008, at 33.8%, has been substantially more dramatic than that experienced nationally (25.5%). This period has seen the withdrawal or retrenchment of a number of high profile manufacturing companies, particularly in the automotive sector. This has included MG Rover at Longbridge (Spring 2005), Jaguar at Browns Lane, Coventry (Autumn 2004) and PSA Peugeot Citroen at Ryton, Coventry (April 2006). This has

had an obvious affect on the components' suppliers, many of which are based in the region.

- 3.14 The projected change in manufacturing employment from 2008 to 2020, at 16.6%, is similar to the national average. However, the West Midlands manufacturing economy is arguably more vulnerable than at a national level. This is due to its reliance, although diminishing, on the automotive sector and traditional primary manufacturing processes (eg metal pressing).
- 3.15 Similarly to the UK, the service sectors in the region have done well. However, it is to be noted that it is projected to increase employment at slightly lower levels (10.7%) than the national average (11.5%).
- 3.16 As with the rest of the country, the reduction in manufacturing and the growth in the service economy will lead to a different pattern of demand for employment premises in the region. However, the growth in demand for property to serve the growing service sectors (ie distribution and office floor space) is unlikely to be spread evenly across the region. This is because they have different principal requirements in terms of location and siting.
- 3.17 Premium locations for distribution in the West Midlands are the M6 motorway from Junction 1 (Rugby) to Junction 15 (Stoke), the M6 toll road (from Coleshill to Cannock), the M42/A42 (from Redditch to Ashby de la Zouch) and the A38 (from north of Birmingham to Burton Upon Trent).
- 3.18 Land that can accommodate large distribution warehouses (i.e. 10,000 sq. m. (100,000ft² plus), and can operate without any restrictions, is in demand. Operators require premises or large sites away from housing, with good access to the national motorway or trunk road network. Smaller distribution sites will require these basic elements too, although can be accommodated on more standard industrial estates as long as there are no restrictions on operation (e.g. hours of use), access by HGVs, and a good clear height in the buildings can be achieved. Additional features sought are sufficient yard space, docking and circulation.

3.19 Apart from the continual progression away from heavy manufacturing to lighter industry, trade uses and distribution, we have noted the following trends with standard industrial property in the region:-

- occupiers have become more discerning about floorspace requirements in order to make better efficiencies and for 'staffing' reasons;
- location in terms of access to the national road network and labour have become more important;
- proximity of industrial units to nearby housing has become a more sensitive issue for environmental reasons (mostly, noise and traffic); and
- there is still a desire for occupiers to own their premises, particularly for small and medium sized firms.

Credit Crunch

3.20 This phenomena has been well documented. However, its implications on the commercial property market have yet to be fully understood and/or possibly felt.

3.21 After a long period of sustained growth, the commercial property market in the UK, particularly as a holding investment, has retracted quite significantly in the last 12 months. Property yields have moved out significantly, without compensatory rental growth, and this has led to a reduction in the overall value of commercial property.

3.22 Part of this is due to an overheating of the commercial property investment market. However, wider economic and financial concerns, referred to as the Credit Crunch, has affected the overall confidence of the market, particularly with lenders and investors.

3.23 Put simply, there is far reduced certainty and confidence in the commercial property market. In addition, there is far less liquidity for financing and funding developments. This has, and will, affect the development of commercial property over the next few years.

3.24 Based on other times of uncertainty, this is likely to depress the market for development land and to bring about a far more cautious approach to speculative

development. In addition, recent changes in legislation on empty industrial building rates has affected the viability of speculative development. Now, and possibly for the foreseeable future, there is a far greater emphasis on pre-lets, pre-sales and design and build.

Lichfield

3.25 The District and the City of Lichfield are well located in terms of both the national and regional industrial and distribution property market.

3.26 Staffordshire is now an established pitch for national and regional high bay warehousing. First and foremost, this is due to its centrality in terms of the UK. A large portion of the UK's population is within four hour drive time – the yard stick employed by logistic companies. In addition, Staffordshire fits well the three principal requirements for logistic operators for high bay warehousing. These are:-

- Location (in terms of road access).
- Land.
- Labour.

3.27 Lichfield sits within the heart of Staffordshire and has been well placed to take advantage of this growing market sector. The extent of development at Fradley Park over the last 10 years is a good indicator of the strength of this market and where Lichfield sits within it.

3.28 At a regional level, Lichfield has good accessibility to many of the major roads serving the area. These include:-

- A38 (T)
- M6 (Toll)
- A5 (T)

3.29 These roads in turn provide a good connection to the national motorway network serving the region (M5, M6, M42 and M40). In addition, good access is provided to other major roads serving Staffordshire and the wider conurbation of Birmingham and the Black Country.

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- 3.30 This is a double advantage. The major roads give Lichfield a 360 degree penetration to the rest of the UK. This cannot be said for all areas or cities and towns in the region. For example, Worcester and Telford are relatively peripheral.
- 3.31 Accessibility to the A roads, and the good connections to major urban areas such as Birmingham, the Black Country and Coventry, make Lichfield a good hub for regional and sub-regional logistics. In addition, it means that Lichfield is a relatively easy place for workers to commute to.
- 3.32 The M6 Toll Road has benefited this part of Staffordshire, with particular reference to the Districts of Lichfield and Cannock. However, the M6 Toll Road is not being used as much as projected, particularly for goods vehicles. This is due mainly to pricing. This position could change and the road could become a stronger route for HGVs. This should be monitored, as it could have a further positive effect on the District.
- 3.33 Lichfield City enjoys relatively good rail links. Lichfield City Station provides a direct line to Birmingham City Centre. Lichfield Trent Valley provides a connection to the West Coast Main Line. Other areas in the District are less well served, such as Burntwood and Fradley.
- 3.34 A major asset for Lichfield City is its environment. It is an attractive city with good amenities and a healthy stock of good housing. As such, it easily attracts relocating staff or senior personnel.
- 3.35 There is a relative absence of heavy manufacturing, comparative to other industrial areas within the West Midlands (eg the Black Country). Much of the manufacturing processes have already disappeared. Integra, who used to occupy a factory building in Eastern Avenue, Lichfield, is a good example. This company made curtain poles. This product is now made in Asia, with Integra now only retaining a much smaller facility for administration and sales. This has released a 4.57 ha (11.3 acres) development site, which King Sturge are currently marketing. More details of this site are provided later in the report.
- 3.36 In addition, the District and City of Lichfield would not seem to be overly reliant on the performance of one or two companies. Nor, is there a reliance on a particular industry or sector of the regional economy.

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- 3.37 For these reasons, Lichfield District should be less vulnerable to structural change in the economy or global economics. This should ensure that any trends in terms of industrial property should be manageable, rather than dramatic.
- 3.38 In terms of a pitch for industrial and distribution property, Lichfield has few obvious critical weaknesses. We have identified two (see below). However, the strengths easily outweigh the weaknesses.
- 3.39 Given the relative lack of a strong manufacturing base, there is a question mark about how organic growth (as apposed to migratory growth like high bay warehousing) can be achieved to any significant scale. Much depends on the scale and encouragement of high value sectors, that are less likely to be affected detrimentally by competitive industry in low cost economics such as China and India.
- 3.40 There is a question of whether there is sufficient labour to serve projected growth of employment within the District. To a large extent, this question is related to the level of housing growth. However, as referred to above, Lichfield has an advantage that it is easily accessible to a wider workforce within the region and has the amenities and environment to attract staff.

Recent Development Activity

- 3.41 Table 1.2 to Appendix 1 (Future Land Estimation Technical Report) to the Employment Land Review (December 2007) provides details of employment land completions between 1996 to 2006. The source of this information is the Staffordshire Employment Land Survey 2006. For ease of reference, this table is reproduced below.

Table 1.2 Employment Land Completions 1996/1997 to 2005/06 (Hectares)

	1996/ 1997	1997/ 1998	1998/ 1999	1999/ 2000	2000/ 2001	2001/ 2002	2002/ 2003	2003/ 2004	2004/ 2005	2005/ 2006
New Land	3.06	3.63	9.33	7.83	4.12	3.83	11.32	10.22	4.54	6.00
Redevelopment Land	0.00	0.26	0.00	1.00	0.00	0.00	1.50	0.00	0.00	0.00
Total Land	3.06	3.89	9.33	8.83	4.12	3.83	12.82	10.22	4.54	6.00

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3.42 Table 1.3 summarises the information, giving average building rates for the past 5 and 10 year averages for both new land and redevelopment land. This table is also provided below for ease of reference.

Table 1.3 Average Building Rates – Past 5 year and past 10 year averages (Hectares)

	2001-2006	Average Build Rate (5 years)	1996-2006	Average Build Rate (10 years)
New Land	35.91	7.18	63.88	6.39
Redevelopment Land	1.50	0.30	2.76	0.28
Total Land	37.41	7.48	66.64	6.66

3.43 The overall average build rate over the last 5 and 10 years at 7.4 hectares (18.3 acres) per annum at 6.66 hectares (16.5 acres) per annum respectively are very healthy. Moreover, the level of take up on new land is steady throughout the 10 year period. Both of these are good indicators that the District of Lichfield has been a strong pitch for industrial and distribution property development over the last ten years or so.

3.44 Since March 2006, there has been increased development activity, purely based on quantitative terms. This is represented below in Table 3.

Table 3 – Employment Land Completions 2006 - 2008

Location	Land ha (acres)
Burntwood BP Zone 1	2.94 (7.26)
Burntwood BP Zone 2	0.74 (1.82)
Fradley Park Phase 1	0.70 (1.73)
Fradley Park Phase 2	23.8 (58.79)
Total	28.18 (69.6)

3.45 It is evident that virtually all employment development has taken place on new land. Over the 10 year period from 1996 to 2006, the extent of development on

redevelopment land has represented less than 5% of the overall amount of total land take up. However, the County Council figures have not documented historically redevelopment of all existing employment sites. In reality the proportion of redevelopment land will be slightly greater.

- 3.46 The majority of take up has taken place at Fradley Park. Given the growth in this market sector, and the land requirements for big high bay warehouses, this is unsurprising. For example, the 23.8 ha (58.9 acres) completion at Phase 2 was taken whole by Tesco for their new 80,000 m² (860,000 ft²) facility. Nevertheless, development at Fradley Park has probably accounted for over 80% of all land development in the District over the last 10 years. Without this scheme, overall land take up in the District would be much lower.
- 3.47 The extent of development in Burntwood Business Park has been more gradual and less dramatic. Nevertheless, development here has been reasonably steady.
- 3.48 Very little development activity has taken place within the existing industrial estates. However, it would appear that this is starting to change. We are marketing a 4.57 ha (11.3 acre) scheme at Eastern Avenue North, Lichfield. This site use to be the old Integra works. In time, we consider there will be further recycling and regeneration of old industrial property, such as this.
- 3.49 Other development activity has been mainly office based. We have identified four schemes in the last few years, in existing employment areas. These are Wall Island, Greenhough Road, Lichfield Business Village and Burntwood Business Park. All these schemes have been relatively successful.

Looking Forward

- 3.50 As easily the largest source of take up of land, the logistics and distribution sector is clearly important. In **Appendix 7**, the latest Logistics Property Today Bulletin issued by King Sturge is provided. This reports on the latest trends in the logistics property market across the UK and presents the latest national data on take up, availability, rents and land values, focusing on new units of 10,000 m² (107,650 ft²) and over.

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- 3.51 The take up of large high bay warehouses for 2008 is maintaining the general levels of the last five years. With the growth prospects for the UK economy in the short term being poor, this may impact upon take up in the next two or three years. However, logistics is seen as an important means to effect wider economies of scale. For this reason, we anticipate that logistic companies and operators will continue to invest in this sector.
- 3.52 Broadly, the average size of unit taken up in new logistics facility of 10,000 m² (107,650 ft²) and over has risen over the last 10 years. In 1996, the average size was just over 20,000 m² (215,000 ft²). Now, the average size exceeds 30,000 m² (323,000 ft²). In addition, there is increasing evidence of very large warehouses, up to almost 100,000 m² (1.08 million ft²). The new Tesco facility at Fradley Park, at just over 80,000 m² (860,000 ft²), is a good example of this trend for huge new warehouses.
- 3.53 We see this trend continuing, because of the cost savings that can be achieved in this size of building. However, we also see an additional trend with a smaller range of distribution centre that have a more regional or sub-regional reach. Specifically, more parcel companies and pallet hubs are now being built. These are land hungry, using only 20 to 30% site cover, and can vary between 5,000 m² (54,000 ft²) and 30,000 m² (323,000 ft²). These buildings are generally staffed on a 24 hour, three shift basis. This is a growth market, that is based principally on the increased use of the internet for shopping. We consider this is likely to increase the demand for further distribution buildings, serving heavily populated areas, such as the West Midlands conurbation.
- 3.54 Access to rail, for the purposes of freight, has become a bigger issue in the last two or three years. This is highlighted in the Spring 2008 bulletin of Logistics Property Today. Currently, developers and operators are not paying a premium for rail connected sites. In addition, companies who elect to use rail, for the conveyance of freight, do not always have to be located next door to the railway. Instead, good accessibility to an inter-modal rail freight terminal is sufficient. The nearest inter-modal rail freight terminal for Lichfield is Hams Hall, at Coleshill. This is reasonably accessible.
- 3.55 Up until recently, developers in this sector were undertaking more speculative development. However, with the Credit Crunch and the change in legislation concerning empty rate relief for industrial and distribution buildings, this trend has stopped. Instead, there has been a transfer to pre-lets or pre-sales and development

on a design and build basis. The availability of serviced land, with planning permission, is fundamental to serve this market.

- 3.56 The prospects for the West Midlands, to capture its share of this market, still remain good. This is due to its centrality and the continuing availability of land and labour.
- 3.57 As referred to above, Lichfield is well placed within the West Midlands to accommodate further market demand in this sector. Moreover, the attractiveness of Lichfield could grow if the M6 Toll is used more frequently by commercial lorries. On the down side, there is a question of available labour, although this has not deterred Tesco in selecting Fradley Park for their recent facility.
- 3.58 There has been a reduction in demand for premises for general manufacturing in the region. This is for the reasons referred to already. However, there is still good demand for industrial buildings that are well located and provide good and reasonable modern accommodation. We see this trend continuing, with new and the existing stock of buildings catering for demand for light industry, final assembly, small scale storage and warehousing, and trade uses.

4 REVIEW OF SUPPLY AND DEMAND AT A LOCAL LEVEL

Vacant Property

- 4.1 The health of a local property market can often be gauged by the level and type of vacant property. We have produced two schedules of industrial vacant property within the District. The first schedule, in **Appendix 8** categorises industrial vacant units by size. The second schedule, in **Appendix 9**, categorises vacant premises by location. Both schedules work in square feet as this is still employed by agents. We provide equivalent figures in square metres in the text to this section (in brackets), but not the tables.
- 4.2 These schedules have been produced by referring to a number of sources. These include the King Sturge property database, a board check of all existing industrial estates within the District of Lichfield, the property Focus database, and the websites of leading local agents. In addition, we have referred to the latest Employment Land Bulletin for the District. Because of the breadth of sources we have used, the number of properties and level of floorspace is likely to be greater than that collated by the Employment Land Bulletin. As such, this “snapshot” of vacant premises should not be compared directly with any analysis of previous Employment Land Bulletins, to measure trends.
- 4.3 The property search for industrial premises reveals that currently there are 65 properties on the market, providing just over 79,000 m² (852,000 ft²) of available floorspace. Given current market conditions, and the size of the District, we do not consider this to be an abnormal level of available property, when considered in totality.
- 4.4 To undertake some basic qualitative analysis, we have broken up the schedule of vacant floorspace by size. This information is translated in Table 4 below.

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Table 4 - Vacant Industrial Property by Size

Size Categories m ² (ft ²)	Number of Properties	Total Floorspace m ² (ft ²)
Up to 185 (Up to 2,000)	16	2,141.6 (23,053)
185 to 465 (2,000 to 5,000)	18	5,850.0 (62,970)
465 to 929 (5,000 to 10,000)	13	8,742.6 (94,106)
929 to 2,323 (10,000 to 25,000)	6	9,497.7 (102,234)
2,323 to 4,645 (25,000 to 50,000)	8	26,623.8 (286,579)
4,645 plus (50,000 plus)	4	26,350.3 (283,635)
TOTAL	65	79,206.3 (852,577)

4.5 Broadly, with an exercise such as this, you would expect the number of properties in each size category to diminish as the size category gets bigger. Generally, this trend emerges. The two categories that break the trend are the 185 to 465 m² (2,000 to 5,000 ft²) category and the 2,323 to 4,645 m² (25,000 to 50,000 ft²) category. Of these two, the number and level of property within the 25,000 to 50,000 ft² category stands out greater.

4.6 Table 5 summarises the schedule in **Appendix 9**, breaking down the available and vacant floorspace by location.

Table 5 – Vacant Industrial Property by Location

Location	Number of Properties	Total Floorspace m ² (ft ²)
Burntwood	40	36,691.4 (394,947)
Fazeley	4	1,978.4 (21,296)
Fradley	5	23,164.7 (249,345)
Lichfield	7	13,048.9 (140,459)
Rugeley	8	3,393.7 (36,530)
Shenstone	1	929.0 (10,000)
TOTAL	65	79,206.3 (852,577)

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- 4.7 Two things stand out. The first concerns the number of units that are currently vacant and available in Burntwood.
- 4.8 Most of these are located in Burntwood Business Park. However, there are six units within the Mount Road estate that total 11,310 m² (121,725 ft²). These account for over 30% of Burntwood's available floorspace.
- 4.9 The second thing that stands out is the paucity of units that are available in the City of Lichfield, relative to the number of industrial estates serving this area. Given the overall number of units, and total floorspace, more than 7 units of vacant and available floorspace in Lichfield City would be expected.
- 4.10 From interviewing Andrew Buckman, it is clear that there is a general shortage of new units serving the District. This is particularly felt within the City of Lichfield. The exception is Burntwood Business Park where two new schemes (Zone 4 and Chasewater Heaths) have relatively recently come to the market. This has tended to inflate the total number of vacant and available units in Burntwood.
- 4.11 We have undertaken analysis of the quarterly Employment Land Bulletins over the period from February 2003 to July 2008. Again, the qualitative analysis has concentrated on size and location.
- 4.12 In **Appendix 10** we have broken down each quarterly bulletin on the same basis as Table 4, categorising the number of units and total floorspace within each size bracket. This information is also represented by a bar chart.
- 4.13 In **Appendix 11**, we have undertaken a similar exercise, but this time in respect of location. Again, we have used the same parameters as with Table 5.
- 4.14 Broadly, the number of units on the market in all locations and size brackets has remained broadly the same. 45 units were on the market in February 2003, with 47 in July 2008. In November 2003, 56 units were on the market and this represented a high point. Conversely, in July 2006, there were just 32 units on the market and this represented a low point.

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- 4.15 Whilst the number of units has broadly remained the same, the level of floorspace has generally increased. In February 2003, 39,265 m² (422,637 ft²) was on the market. In July 2008, 63,965 m² (688,528 ft²) was on the market. The high point was in March 2008, when total floorspace was at 70,835 m² (762,507 ft²). The corresponding low point was August 2003, when just 26,655 m² (286,928 ft²) was on the market. Nevertheless, there is an identifiable trend of a greater level of industrial floorspace on the market now, than in previous years. This reflects both national and regional trends with the market.
- 4.16 With regard to size categories, no really obvious trends or abnormalities stand out. However, it is clear that from February 2003 there were a much greater choice of smaller size units (ie 0 to 185 m² (0 to 2,000 ft²) and 185 to 465 m² (2,000 to 5,000 ft²). Latterly, from September 2005, the number of units within these two categories has diminished, particularly in the 0 to 185 m² (0 to 2,000 ft²) category, until very recently.
- 4.17 With the latest schedule of vacant premises that we have produced, we commented about the abnormal number of units that were in the 2,323 to 4,645 m² (25,000 to 50,000 ft²) category. However, from looking at previous Employment Land Bulletins, it would appear that this trend has only just emerged in the last two or three quarters.
- 4.18 With regard to location, Burntwood has had more units on the market than Lichfield City in 8 out of the 19 quarters that we have analysed. Three of these are the last three quarters considered (ie from November 2007). This suggests that in previous years that the balance of available property between Lichfield and Burntwood has been more equal, than it is now.
- 4.19 Whilst the number of units and level of floorspace in Lichfield City are currently low, this has not always been the case. Apart from July 2008, the range varies from 11 units in September 2004 to 35 units in November 2003. This indicates strongly that the current level of vacant and available floorspace within Lichfield City is abnormally low.
- 4.20 In terms of available floorspace, this analysis demonstrates that Rugeley, Fazeley and Shenstone provide far less vacant units than either Burntwood or Lichfield. This demonstrates that Burntwood and Lichfield are the dominant pitches for industrial

property. However, they also indicate that existing estates north-east of Rugeley, Fazeley and Shenstone are broadly well occupied.

Existing Employment Estates

- 4.21 Our analysis of the existing employment estates included a review of the existing data found in the Employment Land Review and the "traffic light" analysis, a drive around and survey of all the existing estates referred to in these two documents, and discussions with Carl Durrant of King Sturge and Andrew Buckman of Kingston CPC. A note of the structured interview undertaken with Andrew Buckman forms **Appendix 12**.
- 4.22 The analysis of the existing employment estates has considered a number of factors. These include the marketability of the estates, identification of any constraints, consideration of possible alternative uses and any remedial action to improve the offer provided by the estates to companies looking for space. This analysis is presented below in Table 6.
- 4.23 The analysis follows the same order as employed by the Employment Land Review and the "traffic light" analysis. Plans of the various estates are provided in the Employment Land Review and should be referred to.

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Table 6 – Analysis of Existing Employment Estates

Lichfield

Site	Area ha (acres)	Marketability	Who Marketable to	Constraints of the site	Possible alternative uses	Remedial Action
Crossfield Road	5.00 (12.35)	Close to Lichfield Trent Valley Train Station, with good road transport links. Surrounded by other employment uses.	Small / medium sized light industrial and office occupiers in the Lichfield area.	Access and car parking provision to be improved. Could benefit from modernisation / redevelopment.	Trade counter fronting onto the A5192, where the GKN site is currently located. Good potential office location.	Redevelopment of the GKN site. Future modernisation of buildings, access and car parking.
Witell Road	0.40 (0.99)	Close to Lichfield City Train Station, and City Centre facilities.	Small / medium sized light industrial and office occupiers in the Lichfield area.	Irregular in shape. Access and circulation needs improving.	Office development (depending on success of City Wharf). Residential.	Depending upon the success of City Wharf could be redeveloped for offices. Site needs modernising and access improving.
Eastern Avenue – North	9.80 (24.2)	New and refurbished industrial premises will be available shortly ranging from 139.3 to 4,645 m ² (1,500 ft ² to 50,000 ft ²) from the 4.5 ha (11.3 acre) Revelan (ex Integra) site. There is reported to be significant interest due to the lack of other available sites in Lichfield. There are a number of occupiers with large sites on Eastern Avenue North. Once these sites come to the end of their economic life then they will present future development sites.	Small / medium sized industrial occupiers in the Lichfield area. Potential for a number of redevelopment opportunities going forward, to provide a range of industrial accommodation.	Poor public transport links for employees. Good road links, however the site is situated to the north of Lichfield. Sites closer to the A38 will compete. The site is bordered by the railway line, and situated in a flood risk area so suited to employment land.	Trade counter, and quasi retail uses.	Large sites occupied by one occupier will provide development opportunities going into the future.

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Site	Area ha (acres)	Marketability	Who Marketable to	Constraints of the site	Alternative uses	Remedial Action
Eastern Avenue – South	18.90 (46.6)	<p>Good public transport links to Lichfield via bus. Good road links.</p> <p>Separate planning permissions for bulky goods retail and convenience retail have been granted at the southern end of the site.</p> <p>Co-op site provides a potential redevelopment site in the future to provide office / industrial / retail accommodation</p> <p>Norgren and ROM both occupy large sites, which could be a potential re-development site moving forward.</p> <p>Langley Heath Business Park and Trent Park are both in need of modernisation / redevelopment. However, despite of this the scheme is well let.</p>	<p>A range of small and medium sized industrial occupiers.</p> <p>Office occupiers and bulky goods retailers once the bulky goods scheme has been built.</p>	<p>Access to parts could be improved.</p> <p>Modernisation and redevelopment required as larger sites become vacant.</p>	<p>Bulky goods / supermarket site.</p> <p>Offices at the southern end of the site</p>	<p>Redevelopment and modernisation of the various sites moving forward.</p> <p>A number of large development sites may be brought to the market in the future.</p>
Shires Industrial Estate, Essington Road	2.90 (7.16)	<p>Vacant office space, know as Shire House, to the front of site marketed through Colliers.</p> <p>Light industrial accommodation to the rear appears well occupied.</p>	<p>Small light industrial occupiers on Industrial Estate to rear.</p> <p>The Maltings appears to be marketable as a residential scheme if redeveloped.</p>	<p>Listed building on site. Dated estate in need of modernisation, with poor access. Car parking layout not to modern day standards.</p>	<p>Trade Counter to front. Residential.</p> <p>The Maltings appears suitable for residential redevelopment. This is because the expense of</p>	<p>Light industrial scheme which could benefit from modernisation moving forward.</p> <p>May be more suited to light industrial / trade counter scheme if redeveloped.</p>

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		<p>Large Magnet Store to the front of the site – modern building of high quality in prominent road side location.</p> <p>The Maltings contains a listed building on site.</p>	<p>The Magnet Store could attract other trade counter operators.</p>		<p>restoring listed buildings is probably not viable for an office scheme.</p>	
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Site	Area ha (acres)	Marketability	Who Marketable to	Constraints of the site	Alternative uses	Remedial Action
Greenhough Road	2.14 (5.2)	Edge of centre location situated close to park, and within walking distance of town centre facilities. Site consists of a dated light industrial scheme, which is well let, however suitable for redevelopment moving forward. A new office development (Parkside Court) has been constructed on the site which is 50% sold.	Small office occupiers and small light industrial occupiers.	Access to the site is very tight and not suited to any vehicle larger than a van. Therefore more suited to an office location than light industrial.	Whole site suitable for offices, or residential.	Access needs improving.
Britannia Way	15.20 (37.5)	A range of modern industrial units and office suits varying in size. Close to Lichfield Trent Valley Train Station and the A38. Good access and circulation around the site.	Range of industrial occupiers including trade counter operators and trade retailers. Small office occupiers also present.	Higher traffic flows than other estates due to retail type uses attracting customers to the site.	Trade counter / car showroom.	
Lichfield Business Village	0.39 (0.96)	Modern office premises situated within the university grounds. Provides start up office units in university environment. Good access and car parking facilities, within walking distance of city centre facilities.	University graduates establishing businesses.	Well let although this could reflect lack of suitable alternative space.	Education.	

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Site	Area ha (acres)	Marketability	Who Marketable to	Constraints of the site	Alternative uses	Remedial Action
City Wharf	1.16 (2.87)	New office development providing 4,699 m ² (50,590 ft ²) of office accommodation next to Lichfield City Train Station. Edge of centre location close to city centre facilities.	Small and medium sized office occupiers in the Lichfield area.	Car parking appears to be limited and there are signs of congestion caused by St John Street Garage. There are a number of older brick buildings to the front of the site which require refurbishment / modernisation, and ideally would have been incorporated into the City Wharf scheme. In addition, Davidson House situated to the front of the scheme is being marketed 'to let'. This detracts from the prominence of the scheme.		When we inspected the site we noted that St John Street garage is causing congestion. There are numerous cars parked around the garage blocking the access roads. This operator may no longer be suitable for this location. The Redrow residential development to the rear of City Wharf has stopped. Depending on the success of the City Wharf scheme it may be possible to extend it further onto this undeveloped land 0.9 ha (2.22 acres).

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Burntwood

Site	Area ha (acres)	Marketability	Who Marketable to	Constraints of the site	Alternative uses	Remedial Action
Burntwood Business Park Zone 1	14.70 (36.3)	Modern industrial development of high quality, and recently developed office scheme of 12 units of 557.4 m ² (6,000 ft ²) each. Good access and road transport links to Burntwood Western Bypass and the M6 Toll.	Office occupiers requiring modern accommodation and industrial occupiers requiring good transport links in employment location. Close to Morrison's so limited facilities for staff.	Small site of 0.17 ha (0.42 acres) remains undeveloped, despite the scheme being well let.		
Burntwood Business Park Zone 2	12.98 (32.0)	Range of industrial units available, ranging in age and quality. Site is surrounded by employment uses. Good road transport links.	Industrial / distribution companies.	Lack of facilities for staff. Poor public transport links.		Potential for further redevelopment to modernise the units and improve the layout. A number of units on Plant Lane are vacant. This is reported to be due to uncertainty over adopted roads. This situation needs resolving so that units become let.
Burntwood Business Park Zone 3	14.90 (36.8)	Range of industrial units available, ranging in age and quality. Limited public transport to parts of the site. Situated next to Morrisons so some facilities for staff. Good road transport links.	Industrial / distribution companies.	Older units.	Offices. Potential retail / bulky goods / trade counter due to e being situated next to Morrisons.	Potential redevelopment / modernisation of older dated units.

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Site	Area ha (acres)	Marketability	Who Marketable to	Constraints of the site	Alternative uses	Remedial Action
Burntwood Business Park Zone 4	13.60 (33.6)	Older industrial units. Limited public transport to the site. Situated opposite Morrisons so some facilities for staff. Good road transport links. Good circulation with plenty of car parking space.	Industrial / distribution companies. The site is surrounded on two sides by residential and therefore could come under pressure for residential redevelopment.	Many units are old and dated. Parts of the site will become suitable for redevelopment in the future. Circulation and car parking facilities not up to modern standards.	May come under pressure for residential. Should be monitored.	Potential for redevelopment or refurbishment of existing accommodation to provide a modern estate, with associated access road and car parking facilities.
Queen Street	0.40 (0.98)	Well let scheme comprised of light industrial and builders / timber merchants. Within walking distance of Chasetown High Street.	Light industrial occupiers and those who retail to the trade.	Accessed by residential streets. Car parking limited.	Residential.	
FOM Innovation Centre	0.39 (0.96)	Situated in Green Belt in attractive settings.	Creative industries. Serves a particular purpose. Potential for expansion is limited.	Rural location – lack of public transport and facilities.		
Mount Road	13.40 (33.1)	Dated industrial estate accessed from Mount Road. More modern industrial buildings on Stanley Business Park.	Small light industrial companies.	The rear of the site, with access from Mount Road will come under pressure for residential redevelopment, being surrounded by residential uses. Access to this part of the site is poor through residential streets. The remaining part of the industrial site fronting New Road suffers from congestion. Access and car parking facilities need improvement.	Residential.	Access and car parking needs modernising. When the Mizkan site reaches the end of its economic life, there will be a potential redevelopment opportunity.

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Shenstone

Site	Area ha (acres)	Marketability	Who Marketable to	Constraints of the site	Alternative uses	Remedial Action
Lichfield South	1.20 (2.96)	Attractive rural location offering three head quarter office buildings. Facilities for staff include a hotel, gym and fast food restaurant. Good road transport links. Successful scheme – fully let.	Head quarter office occupiers based in the Lichfield area.	Situated in the green belt, and lack of public transport.		
Shenstone Industrial Estate	11.50 (28.4)	Variety of buildings ranging from modern office and industrial buildings to older industrial units in varying states of disrepair. The smaller modern office and industrial units are marketable offering good parking and circulation, close to major strategic roads. Shenstone train station within walking distance.	Small office and light industrial occupiers.	Footpath links from the further reaches of the site to Shenstone village are poor. Limited facilities in Shenstone village for staff. Village location means that the site is not suitable for HGV's. Parts of the site are highlight as at risk from flooding.	Offices nearer to Shenstone village.	Encourage businesses which generate HGV movement to move to more suitable locations. As parts of the site become available redevelopment for light industrial / offices may be suitable.

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Fazeley

Site	Area ha (acres)	Marketability	Who Marketable to	Constraints of the site	Alternative uses	Remedial Action
Drayton Manor Business Park	14.0 (34.6)	Good road transport links close to M6 Toll. Wide circulation roads on the estate and plenty of car parking.	Regional industrial and office occupiers.	Within green belt. Congestion on the Coleshill Road caused by Drayton Manor Theme Park. Not accessible by public transport.		Older buildings could be redeveloped to offer modern accommodation.
Tolson Mill Industrial Estate.	1.90 (4.7)	Historic Mill building used as workshops, and modern small light industrial units, built in the grounds of the Mill. Attractive setting within walking distance of town centre facilities. Well let.	Light industrial and craft workshops	Car parking not to modern standards. Congestion to parts of site. Poor public transport links. Poor access through residential streets. Not suitable for HGV. Lack of visibility.	Craft / workshops / offices.	
Riverside Industrial Estate	5.00 (12.3)	Good basic industrial units of various sizes. Good road frontage, circulation and car parking provision. Short walk to town centre facilities. Good road transport links.	Industrial occupiers and those who retail to the trade.	Dated and informal layout. Older parts of the site could benefit from redevelopment / modernisation.	Trade counter to road frontage. Site not suitable for residential redevelopment since the area has been identified as at risk from flooding.	In need of modernisation.
Bonehill Mews	0.56 (1.38)	Recently refurbished office development situated on a small site. Attractive scheme set in green belt location. Fully let. Success of scheme demonstrates that similar developments would be successful close by.	Small office occupiers.	Listed building to front of site requires restoration. Small site makes road layout and circulation tight.		

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Other employment sites identified in Fazeley

Site	Area ha (acres)	Marketability	Who Marketable to	Constraints of the site	Alternative uses	Remedial Action
Main Mill, Main Road	0.85 (2.1)	Site appears to be mainly vacant, although there are no marketing boards on the site.	Light industrial occupiers.	Site in need of modernisation. Road surface needs relaying.	Craft workshops.	Suitable for redevelopment / modernisation.
Pullman Fleet Site, Main Road	0.46 (11.36)	Large site occupied by a single occupier.	Will provide a future development site moving forward.	Located in an area at risk of flooding.	Following the success of the Bonehill Mews scheme may be suitable for small office occupiers. Otherwise suitable for light industrial.	When site reaches end of useful economic life, will provide a redevelopment site in the medium term.
Timber Yard, Main Road (opposite Main Mill)	0.66 (1.63)	Large site used as a timber yard.	Will provide a future development site moving forward.	Located in an area at risk of flooding.	Following the success of the Bonehill Mews scheme may be suitable for small office occupiers. Otherwise suitable for light industrial.	When site reaches end of useful economic life, will provide a redevelopment site.
Lakeside Business Park	0.39 (0.96)	Site comprises of small brick built workshops. Good access off main road. Attractive location overlooking a lake.	Light industrial occupiers.	Small sight makes circulation roads tight around the site. Parts of the site congested.		Car parking and access around the site needs improvement.

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Armitage

Site	Area ha (acres)	Marketability	Who Marketable to	Constraints of the site	Alternative uses	Remedial Action
Armitage Shanks	10.20 (25.19)	Site would require redevelopment to be attractive to new occupiers. Site is located close to town centre facilities, and good public transport links.	Currently single occupier on site. If redeveloped may be suitable for light industrial / office uses.	Access is via residential roads not suitable to large amounts of HGV movement.	Light industrial / offices / residential.	

Sites near Rugeley

Site	Area ha (acres)	Marketability	Who Marketable to	Constraints of the site	Alternative uses	Remedial Action
Towers Business Park	0.26 (0.64)	Office units situated adjacent to Power Station. Modern build and layout. Adequate car parking.	Office occupiers in the Rugeley area looking for modern accommodation.	Situation next to Power Station may be off putting to occupiers. Access to road network is poor. No public transport. Poor / slow take up of space.		
Parchfields Enterprise Park	0.34 (0.84)	Small farm based office development. Attractive location, within walking distance of local train station.	Small office / craft workshop occupiers.	Poor access to site and poor layout for movement of cars. Dated buildings in need of modernisation. No near by facilities for staff.	Agricultural uses.	
Rydal Estate	2.00 (4.94)	Modern industrial estate. Well let. Near to train station with good access, and circulation.	Industrial occupiers.	Poor access to highways and facilities.		
Trent Valley Trading Estate	2.80 (6.91)	Range of light industrial units ranging in age, size and quality. Adequate car parking and circulation.		Informal road layout, poor public transport links and access to the road network.		

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Kings Bromley

Site	Area ha (acres)	Marketability	Who Marketable to	Constraints of the site	Alternative uses	Remedial Action
Archers	1.80 (4.45)	Rural location with good access and adequate car parking. Reasonably well occupied.	Local light industrial businesses.	Dated estate with limited public transport links.	Residential / offices.	Modernisation / redevelopment.

Fradley

Site	Area ha (acres)	Marketability	Who Marketable to	Constraints of the site	Alternative uses	Remedial Action
Phase 1	19.70 (48.7)	Good quality modern office and industrial buildings. Very good transport links, access and car parking facilities. Well let.	Office, light industrial and small distribution companies.	Limited facilities for staff in area, and poor public transport links.		Small parcels of land have remained undeveloped for a number of years despite the scheme being well let. Promotion of these sites for redevelopment may benefit the park. Facilities to service the site should be improved.
Phase 2	140.00 (345.8)	Modern large distribution sheds. Very good road transport links.	Distribution companies.	Capacity of the A38 moving forward. Poor public transport links and lack of facilities for staff.		Facilities on the site should be improved, including public transport links.
Fradley Distribution Park	19.40 (47.9)	Very good transport links.	Industrial / distribution companies.	Dated industrial buildings. One company occupies a large amount of the site – could bring a future development site forward if they relocate.		Opportunities for redevelopment / modernisation as buildings reach the end of their economic life.
Fradley Wood	13.50 (33.35)	Older aeroplane hanger type sheds suitable for redevelopment / modernisation. Very good transport links.	Industrial / distribution companies.	Dated units suitable for redevelopment. Inadequate road surface.		Opportunities for redevelopment / modernisation as building reach end of economic life.

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Site	Area ha (acres)	Marketability	Who Marketable to	Constraints of the site	Alternative uses	Remedial Action
Fradley Auction Centre	4.36	Mixed site comprising of offices to front and industrial to rear. Very good transport links.	Office and industrial occupiers.	Inadequate road surface. No consistent scheme on the site.		Potential redevelopment site moving forward.

4.24 The "traffic light" analysis grades the various estates red, yellow or green, with red suggesting that the future of the estate for employment uses may be doubtful, and green, indicating that the future use for employment is secure. In most cases, our analysis supports the findings of the "traffic light" analysis. However, in certain cases, we would advise that reconsideration is given.

4.25 Wiltell Road in Lichfield is shown as red. We would agree that this scheme is ready for redevelopment. However, depending on the success of the nearby City Wharf, we advise consideration should be given for change of use to offices, rather than a release of the site to residential. This situation should be monitored. On this basis, we would suggest the colour code should be yellow, rather than red.

4.26 Conversely, we consider the Shires Industrial Estate should move from yellow to red. This estate provides a poor level of accommodation and has passed its economic life. Being neither in town or out of town, it is not a particularly strong location for offices. For these reasons, consideration should be given to the release of this site, if assembled, to residential.

4.27 The Greenhough Road site is shown as red. However, Parkside Court has been a relative success for office development. On this basis, consideration should be given to the release of the remaining industrial land for offices, rather than alternative uses, such as residential.

4.28 Burntwood Business Park Zone 4 is shown as yellow. Despite Burntwood having an abnormal level of vacant property on the market, compared to the rest of the District, particularly Lichfield City, we consider that Burntwood Business Park does have a good medium and long term future. This is because of the availability of labour from both Burntwood and nearby Cannock and the improved accessibility from the M6 Toll Road. This site should be reclassified as green.

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4.29 Mount Road is shown as red. We would agree with this classification. This estate contains some very poor accommodation, that is incompatible with surrounding houses, and a proportionately high level of vacant and available floorspace. In addition, this estate has very poor road access. Subject to relocating some core users (such as Mizkan) and assembling land, we consider this estate could be released for residential.

4.30 Shenstone Industrial Estate is indicated as red. However, we consider that this estate does have a viable future in the medium and long term. The critical issue is one of accessibility to the major road network. Consideration should be given to restrictions on HGVs and the translation of this estate to lighter industry and potentially office development, given the proximity of the railway station. This should be shown as yellow.

4.31 Both Tolson Mill and Riverside Industrial Estate in Fazeley are classified as red. These estates may not be perfect. However, they do have a place and serve a particular market. On this basis, we consider they should be reclassified as yellow.

Development Sites

4.32 Our appraisal of allocated employment development land has followed the same basic methodology as the existing estates. We have used the data in the Employment Land Review, "traffic light" analysis and subsequent survey work undertaken by the District for the return to RELS that provides an up to date position as at 31 March 2008. For the ease of reference, this up to date summary, along with associated plans, forms **Appendix 13**. We have subsequently inspected all the sites and discussed these with Carl Durrant and Andrew Buckman.

4.33 Our analysis has concentrated particularly on the marketability and deliverability of each allocated site. Thereafter, we then make conclusions on how much land is readily available and how much is identifiable going forward in the medium and longer term.

4.34 Our assessment of the allocated sites is summarised below in Table 7.

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Table 7 – Assessment of Allocated Employment Development Sites

SITE	TOTAL AREA HA (ACRES)	MARKETABILITY	DELIVERABILITY	LAND AVAILABILITY STATUS	
				Readily Available HA (ACRES)	Identifiable HA (ACRES)
Burton Old Road, Streethay	12.4 (30.6)	The site is well located. In addition, it well related to existing industrial areas serving Lichfield City (ie Britannia Way). It also enjoys good prominence (but not accessibility) to the A38 trunk road. When developed, the site should be attractive to B1, B2 and B8 occupiers.	<p>The site is owned and promoted by Stoford. The site is flat and, as greenfield, will not be contaminated. Outline planning permission was granted on 8 June 2006 for the first phase (5.5 hectares) (13.6 acres)). Development of this first phase does not require any significant improvement to the access road from Britannia Way, that crosses the West Coast Mainline.</p> <p>A more recent outline planning application for the full site (12.4 hectares) (30.6 acres) has been recently refused. This is for environmental reasons, concerning the mixture of uses and scale of development.</p> <p>Development of the large site does have implications in terms of highways. More significant improvements to the access and Britannia Way and a second access would be required. These are</p>	5.5 (13.6)	6.9 (17.0)

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			considered to be resolvable, albeit will affect the timescale of development of the larger site.		
Burntwood Business Park Zone 5	11.2 (27.7)	Development site in a prime location, with prominence to the new link road to the M6 Toll. This site is suitable for industrial, trade and high bay warehousing, given its size and the new road connection to the M6 Toll Road.	The is controlled by LCP, who own much of Burntwood Business Park. A planning application for a trade scheme of 2,323 m ² (25,005 ft ²) in the northern part of the site has been submitted, but withdrawn. A planning application for the remainder of the site, comprising a large high bay warehouse of 30,100 m ² (323,996 ft ²) is being prepared and is due for submission. Access to the existing estate road network is constructed and the site is readily available.	11.2 (27.7)	
Burntwood Business Park Zone 1	1.35 (3.3)	Burntwood Business Park Zone 1 is an established pitch for industrial and office development. The vast majority of Zone 1 has now been developed, leaving only 1.35 hectares (3.3 acres) remaining. This is available in 3 plots. All of these plots are suitable and marketable for industrial redevelopment.	One of the plots (0.21 hectares) (0.52 acres)) has outline planning permission. The other two remaining sites, located of Plant Lane, have no obvious constraints.	1.35 (3.3)	
Fradley Phase 1	3.72 (9.2)	These plots are marketable for offices and industrial units. Development out of Phase 1 land has been slow. To a certain extent, this is due to the initial	The 3.72 hectares (9.2 acres) is split between 7 developable sites. However, 3 of these sites can be combined to provide one site of just	3.72 (9.2)	

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		development for offices.	over 2.2 hectares (5.4 acres). Virtually all plots have planning permission, are greenfield and are fully serviced. As such, they are all readily available.		
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Fradley Phase 2	49.3 (121.8)	This land is situated within a well established distribution park; the attractiveness of which has been recently demonstrated by the new 80,000 m ² (861,120 ft ²). Tesco distribution warehouse. The total land available is split only into two plots. Therefore, it is still highly marketable to the high bay warehousing distribution sector.	Plot D104 (7.3 hectares) has planning permission. This site is ready to go, as and when demanded. The remaining 42 hectares, and other employment development land in this vicinity (see below) may have some issues in terms of contributing to wider highway improvements through the junction to the A38. This may affect its deliverability in the very short term.	7.3 (18.0)	42
Fradley Phase 3	18.6 (45.9)	As above	This land is owned and controlled by ProLogis, who are marketing the site for development. However, the deliverability of this site is affected by some of the same issues to Phase 4 to Fradley Phase 2. As such, its deliverability in the very short term cannot be guaranteed.		18.6 (45.9)
North Britannia Way	2.5 (6.2)	Like Burton Old Road, this site is well located and well related to the successful industrial development of Britannia Way. Therefore, it will be attractive to most B1, B2 & B8 users.	The site should be more deliverable than the land at Burton Old Road, being located away from existing residential property and south of the West Coast Mainline. However, there		2.5 (6.2)

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			is an outstanding issue of land assembly and this has affected this land being developed.		
TOTAL	99.07 (244.7)			29.07 (71.8)	70 (172.9)

4.35 In addition, there is other existing industrial land or other development sites, that are not allocated for development, that will or may be capable of generating employment development land in the short term. These are summarised below in Table 8.

Table 8 – Other Employment Land Development Sites

SITE	TOTAL AREA HA (ACRES)	MARKETABILITY	DELIVERABILITY	LAND AVAILABILITY STATUS	
				Readily Available HA (ACRES)	Identifiable HA (ACRES)
Former Integra Works, Eastern Avenue, Lichfield	4.57 (11.3)	The scheme is being promoted by Revelan, and will provide 5,268 m ² (56,660 ft ²) of refurbished floorspace in 14 units and 13,272 m ² (142,860 ft ²) in 5 new units. Already, a number of these refurbished and new units are under offer to perspective occupiers, although not ready for occupation.	A planning application for the scheme has been submitted, but no decision made. Development will commence on receipt of planning permission. A copy of the submitted scheme forms Appendix 13 .	4.57 (11.3)	
Triangle Extension	0.7 (1.7)	Located adjoining the Stoford land, north of Britannia Way. Enjoys the same marketable characteristics, albeit can only accommodate a much smaller level of floorspace.	Same deliverability issues as the adjoining Stoford Land.		0.7 (1.7)

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Lucas Site, Fradley Park	5.2 (12.8)	This site is located within the heart of Fradley Park. Will go well once marketing commences.	Has planning permission for 17,651 m ² (190,000 ft ²) of B1, B2 and B8 in 10 units.	5.2 (12.8)	
TOTAL	10.47 (25.9)			9.77 (24.1)	0.7 (1.7)

4.36 We have estimated that there is 38.84 hectares (96 acres) of readily available land. This exceeds the current requirement set by Regional Spatial Strategy by just over 15%. This is not considered to be significant.

4.37 In addition, we have identified a further 70.7 hectares (174.6 acres) of employment development land. If you add this figure to the amount of land that has been developed since March 2006 (27.84), you generate a total of 98.54 hectares (243.4 acres). Taking into account land that is considered to be readily available, this gives a grand total for the RSS plan period (2006 – 2026) of 137.38 ha (339.3 acres). This exceeds the RSS target by almost 39 ha (or by more than a 1/3rd of the 99 ha (2.445 acres)).

4.38 However, this level of land would not seem disproportionate when considered quantitatively against past take-up rates for the District. The average build rate over the period from 1996 to 2006 was 6.66 hectares (16.5 acres) per annum. This rate projected over the period to 2026 would indicate a total requirement of 133.2 ha (329 acres).

4.39 Much of the remaining 70 hectares (172.9 acres) of identifiable land is relatively close to being readily available. Indeed, it is arguable that a greater level of land at Fradley Park is readily available and will come on stream in response to firm interest (as with the large Tesco facility).

4.40 If any de-allocations of development land are deemed appropriate, then Fradley Park would seem to be the most obvious candidate, based on the fact that it holds over 75 ha (185.3 acres) of development land. However, if development land is taken away (particularly the bigger holdings in Phases 2 and 3) then it is far less likely to attract inward investing companies in the still active logistics sector.

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- 4.41 We have not looked beyond obvious development sites. However, in time, other sites will come forward. In particular, we consider that older industrial property and estates will recycle and regenerate, releasing development land. The former Integra factory at Eastern Avenue, Lichfield, is a classic example.
- 4.42 In addition, there may be scope for further employment land provision at Rugeley Power Station. The future of this facility is not certain and it may release some further development land in the period up to 2026.
- 4.43 In terms of location, the portfolio of employment development land broadly reflects past development trends. The majority of development land is still located in Fradley. With the remainder split between Burntwood and Lichfield City. Given our projections for the industrial and distribution market, we consider this distribution is broadly in balance.

5 IMPLICATIONS ON THE PORTFOLIO OF LAND

Existing Estates

- 5.1 The analysis of vacant property and the survey of the existing employment areas serving the District has not identified any significant long term imbalances between supply and demand. Broadly, the existing portfolio of estates and employment areas would seem to in balance and in a good state of health.
- 5.2 The portfolio provides a reasonable mix and range of industrial and other employment based property. These cater for all the principal different market sectors (ie offices, industry, trade and distribution), with certain estates favouring particular users. For example, Fradley Park is a specialist destination for large high bay distribution buildings.
- 5.3 In addition, there is a reasonable geographic spread, with the largest concentration serving the most populated areas. Lichfield City has a tighter stock of industrial premises (and noticeably less vacant and available units currently), but has more development opportunities going forward. Burntwood has a much looser stock of industrial premises (and noticeably more vacant and available premises currently), but fewer development opportunities going forward. Other centres, such as Shenstone, Fazeley, and Rugeley are all sufficiently served.
- 5.4 There is also a good range of industrial premises in terms of size, age, quality and price. No obvious shortage or over provision by typology was identified through the survey.
- 5.5 For these reasons, we suggest at this stage only a limited release of existing industrial estates to alternative non employment uses, such as residential, over the lifetime of the Local Development Framework. Principally, these are:-
- Mount Road, Burntwood
 - Shires Industrial Estate, Lichfield

5.6 In terms of the colour coding employed by the "traffic light" analysis, we recommend the following changes in classification:-

- Wiltell Road, Lichfield – from red to yellow.
- Greenhough Road, Lichfield – from red to yellow.
- Burntwood Business Park Zone 4 – from yellow to green.
- Shenstone Industrial Estate – from red to yellow.
- Tolson Mill Industrial Estate, Fazeley – from red to yellow.
- Riverside Industrial Estate, Fazeley – from red to yellow.

5.7 Consideration should be given also to the potential for offices in the southern part of Eastern Avenue South and the Crossfield Road Industrial Estate, Lichfield. This is appraised in greater detail in our report on the office market.

Development Sites

5.8 We have estimated that there is 38.84 hectares (95.9 acres) of readily available land. This just exceeds the current requirement set by Regional Spatial Strategy of 33 hectares (81.5 acres).

5.9 In addition, we have identified a further 70.7 hectares (174.6 acres) of employment development land. If you add this figure to the amount of land that has been developed since March 2006 (27.84) you generate a total of 98.54 hectares (243.4 acres). The vast majority of the 70.7 hectares (174.6 acres) is unconstrained and marketable. As such, the transition from identifiable to readily available should be relatively easy performed within the short term.

5.10 If any de-allocations of development land are deemed appropriate, then Fradley Park would seem to be the most obvious candidate, based on the fact that it holds over 75 ha of development land. However, if development land is taken away (particularly the bigger holdings in Phases 2 and 3) then it is far less likely to attract inward investing companies in the still active logistics sector.

5.11 However, this level of land would not seem disproportionate when considered quantitatively against past take-up rates for the District. The average build rate over the period from 1996 to 2006 was 6.66 hectares (16.5 acres) per annum. This rate

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projected over the period to 2026 would indicate a total requirement of 133.2 ha (329 acres).

- 5.12 The geographic spread of development land within the District is summarised below in Table 9.

Table 9 – Summary of Employment Land by Principal Location

Location	Readily Available Land Hectares (Acres)	Identifiable Land Hectares (Acres)
Burntwood	12.55 (30.9)	-
Fradley	16.22 (40.0)	60.6 (149.7)
Lichfield City	10.07 (24.9)	10.1 (24.9)
TOTAL	38.84 (95.9)	70.7 (174.6)

- 5.13 The level of land at Burntwood and Lichfield sits well in respect of current market conditions. As referred to above, there is a more pressing need for more development land to serve Lichfield City, than there is Burntwood. This is evident by the relative amount of vacant and available industrial property in Burntwood (relatively high) and Lichfield City (relatively low).

- 5.14 The majority of development land is at Fradley Park. However, this broadly reflects past development trends. In addition, it leaves sufficient land to accommodate the high bay warehouse market sector, that we consider is still active and requires easily the largest land take.

- 5.15 For these reasons, we consider that the existing portfolio of development land is well balanced both locationally and by market sector.

- 5.16 Given this analysis, we would not advocate at this stage making any additional allocations, nor releasing allocated land for alternative non employment uses. However, this position should be monitored and reviewed at regular intervals, given the current financial and economic uncertainty and the length of the LDF plan period.

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APPENDIX 1

"TRAFFIC LIGHT" ANALYSIS UNDERTAKEN BY LICHFIELD DISTRICT COUNCIL

	Lichfield Sites	Ha	Summary – Constraints to site remaining in current use/state	Summary - Pros	Traffic Light	Long Term – Policy Issues
1	Crossfield Road	5	<ul style="list-style-type: none"> Dated units, access & layout Level of freehold makes solution difficult Likely to be sensitive to rental increases potential impact on decline in manufacturing 	<ul style="list-style-type: none"> surrounded by employment uses close to train station good number of small units 		Identify as in need of improvement/redevelopment for general employment, offices, mixed employment and retail. Likely to need investment in physical fabric and layout if it is to continue as a viable employment site.
2	Witell Road	0.4	<ul style="list-style-type: none"> Dated units, access & layout Likely to be sensitive to rental increases Access by larger vehicles via busy residential road and junction potential impact on decline in manufacturing 	<ul style="list-style-type: none"> close to city centre services and facilities one of only a few smaller sites on the south side of the city 		In need of redevelopment- consider potential for offices/mixed use/residential. Likely to need investment in physical fabric and layout if it is to continue as a viable employment site.
3	Eastern Avenue – North	9.8	<ul style="list-style-type: none"> some of the larger units may close due to changing business requirements Busy West Coast Man line forms northern boundary No facilities potential impact on decline in manufacturing flood risk 	<ul style="list-style-type: none"> larger plots may require less remediation to and easier to redevelop access by bus from Lichfield City good access to strategic highway network 		Maintain for employment – support redevelopment and modernisation of certain areas – potential for large office development although public transport is not ideal and no local services close.
4	Eastern Avenue – South	18.9	<ul style="list-style-type: none"> interest in pursuing redevelopment for retail visual appearance of some areas appear poor, some buildings dated many direct access points onto the main road potential impact on decline in manufacturing 	<ul style="list-style-type: none"> good access to strategic highway network area at Trent Valley Road accessible to station and bus links to city centre 		Maintain for employment – support redevelopment and modernisation of certain areas – potential for large office development.
5	Shires Industrial Estate	2.9	<ul style="list-style-type: none"> surrounded by residential access via residential roads with low bridges estate is dated Likely to be sensitive to rental increases potential impact on decline in manufacturing 	<ul style="list-style-type: none"> within walking distance of station and city centre services and facilities one of only a few smaller sites on the south side of the city 		Identify as in need of redevelopment for offices/mixed use/residential. Likely to need investment in physical fabric and layout if it is to continue as a viable employment site. Accessibility for commercial vehicles may deter investment.
6	Greenhough Road	2.14	<ul style="list-style-type: none"> access poor via residential roads adjacent to Beacon park and surrounded by residential uses potential impact on decline in manufacturing 	<ul style="list-style-type: none"> edge of centre location – within walking distance of city centre recent large scale office development under construction 		Access issues are likely to constrain potential general B Use class users on the site. Consider potential for other employment uses such as offices if decline in manufacturing on the site.
7	Britannia Way	15.2	<ul style="list-style-type: none"> gradual change away from traditional B Use class industry towards retail access from nearby public transport nodes and pedestrian access limited potential impact on decline in manufacturing 	<ul style="list-style-type: none"> large relatively modern estate with variety of unit sizes due to diversification away from traditional industry may suffer less from decline in manufacturing good access to strategic highway and motorway network 		Monitor site in terms of units lost to other employment/retail uses.
8	Lichfield Business Village	0.39	<ul style="list-style-type: none"> 	<ul style="list-style-type: none"> new development proved successful 		
9A	City Wharf	0.47 ?	<ul style="list-style-type: none"> 	<ul style="list-style-type: none"> construction for 4,700sqm office under way city centre location benefits from access to services and facilities including railway station 		
10 A	Britannia Way Extension	2.4	<ul style="list-style-type: none"> land ownership constraints resolved? 	<ul style="list-style-type: none"> Enclosed by employment good access to strategic highway network 		Could consider use of site for specific employment sector - offices
11 A	Triangle	0.7	<ul style="list-style-type: none"> Access, location in relation to railways 	<ul style="list-style-type: none"> Surrounded by other existing and allocated employment land 		Consider the likelihood of this site coming forward.
12 A	Boley Park Extension	11.8	<ul style="list-style-type: none"> existing blanket policy that allows B1, B2 and B8 	<ul style="list-style-type: none"> only significant new site available – application refused and appeal pending – revised application pending well located in relation to existing employment and Trent 		Site saved for employment uses within the Lichfield Local Plan.

Valley Station

- good access to strategic highway network



	Burntwood Sites	Ha	Summary – Constraints to site remaining in current use/state	Summary - Pros	Traffic Light	Long Term
13	BBP Zone 1	14.7	<ul style="list-style-type: none"> access by public transport limited to parts of the site no services or facilities 	<ul style="list-style-type: none"> most recent development in Burntwood good access to strategic highway network surrounded by employment site good access to strategic highway network 		Likely to remain the most viable modern site in Burntwood.
14	BBP Zone 2	12.8 9	<ul style="list-style-type: none"> large site – could suffer as a result of decline in manufacturing in particular some older units made worse by amount of adjacent employment land access by public transport limited to parts of the site no services or facilities 	<ul style="list-style-type: none"> good access to strategic highway network parts of site within walking distance from Sankeys Corner. 		Part of around 53 ha of built employment land with a potential additional 11 ha allocated as saved policy. Concern over amount of manufacturing and impact of decline in this sector over period. Long term decline in manufacturing may result in pockets of sites remaining vacant
15	BBP Zone 3	14.9	<ul style="list-style-type: none"> large site – could suffer as a result of decline in manufacturing in particular some older units made worse by amount of adjacent employment land access by public transport limited to parts of the site limited services or facilities accessible to workforce dependant on location within site 	<ul style="list-style-type: none"> good access to strategic highway network 		Part of around 53 ha of built employment land with a potential additional 11 ha allocated as saved policy. Concern over amount of manufacturing and impact of decline in this sector over period. Long term decline in manufacturing may result in pockets of sites remaining vacant. Close to potential town centre and possible pressures in the future for other land uses on parts of this site.
16	BBP Zone 4	13.6	<ul style="list-style-type: none"> despite some investment this site still appears dated in terms of layout and some units surrounded on 2 sides by residential development 	<ul style="list-style-type: none"> appears well let good access from bypass good access to strategic highway network 		Part of around 53 ha of built employment land with a potential additional 11 ha allocated as saved policy. Concern over amount of manufacturing and impact of decline in this sector over period.
17	BBSP Zone	13.4	<ul style="list-style-type: none"> pressure for alternative uses on all or part of the site availability of existing underused, vacant and semi-derelict sites land owner willingness 	<ul style="list-style-type: none"> only existing available new site allocated for employment under saved policies good access to strategic highway network premium location - high visibility road frontage on main road with easy access to strategic highway network 		Site saved for employment uses within the Lichfield Local Plan.
18	Queen Street	0.4	<ul style="list-style-type: none"> small site – ownership unknown-potential for future redevelopment pressure surrounded by residential uses 	<ul style="list-style-type: none"> only small such site 		Remains a viable small employment site predominantly serving the building trade.
20	FOM Innovation Centre	0.39	<ul style="list-style-type: none"> limited to small creative type industries green belt 	<ul style="list-style-type: none"> provides business opportunities for small creative industries 		
19	Mount Road	13.4	<ul style="list-style-type: none"> 2 accesses splits site making redevelopment potentially possible poor state of certain parts and units poor/dated layout poor access for heavy goods location in centre of residential area large site – could suffer as a result of decline multi ownership likely to inhibit any redevelopment for employment or other uses some units likely to be sensitive to slight changes in rental value 	<ul style="list-style-type: none"> some individual units have received substantial investment and some newly built units to let 		Difficult site for a variety of reasons –effecting change could be challenging. Need to address the possibility of continued decline due to overall decline in manufacturing and availability of more accessible alternative sites.

SHENSTONE							
20A	Lichfield South	1.2	<ul style="list-style-type: none"> green belt rural location – impact on the landscape lack of services and facilities for employees lack of frequent public transport access by commercial vehicles via centre of historical village number and frequency HGVs, B8 uses large site for village location pressure for part of site for redevelopment for residential is it any better located/accessible than sites in Lichfield City that can also be accessed via train limited parking at train station flood risk 	<ul style="list-style-type: none"> successfully let as 3 HQ offices prominent location attractive rural landscape access to strategic highway network access to train services rural employment 		<p>Consider whether site is likely to remain viable long term as it is at present.</p> <p>Consideration of potential on some of site for redevelopment for offices and employment uses away from HGV uses.</p> <p>Extent to which it serves local community in terms of employment.</p>	
FAZELEY							
22	Drayton Manor Business Park	14	<ul style="list-style-type: none"> green belt location rural location with no access to public transport flood risk 	<ul style="list-style-type: none"> redevelopment/modernisation of existing employment good highway links close to Fazeley and Tamworth appears well let 		<p>Major Developed site within the green belt – potential policy site constraints</p>	
23	Tolson Mill	1.9	<ul style="list-style-type: none"> poor vehicular access via residential road could limit future interest in this site potential impact on viability due to proximity to Drayton Manor Business Park dated estate – layout impact of decline in manufacturing flood risk 			<p>Environment Agency – avoid redevelopment for residential due to flood risk</p>	
24	Riverside Industrial Estate	5	<ul style="list-style-type: none"> increase in number of retail units potential availability of alternative sites within Tamworth dated and informal layout impact on Canal conservation area flood risk 	<ul style="list-style-type: none"> located some distance from residential properties local workforce 		<p>Consider whether site is likely to remain viable long term as it is at present.</p> <p>Environment Agency – avoid redevelopment for residential due to flood risk</p>	
25	Bonehill Mews	0.56	<ul style="list-style-type: none"> listed buildings on site 	<ul style="list-style-type: none"> recently refurbished – office development small site – likely to be less affected by long term employment changes 			
ARMITAGE							
26	Armitage Shanks	10.2	<ul style="list-style-type: none"> single user site – the future of this site could be affected significantly if there are any changes with regard to the companies overall international strategy – could result in further land to be released, local unemployment potentially more limited in terms of employment types frequent trips by HGVs within parts of the settlement poor visibility at secondary access points 	<ul style="list-style-type: none"> accessible by foot to local residents and on frequent bus route limited range of facilities and services within settlement 		<p>What would happen if Ideal Standard changes their strategy relating to this site within the plan period? What potential would there be and what would be viable in terms of scale and uses if retaining employment use within Armitage?</p>	
SITES NEAR RUGELEY							
27	Towers Business Park	0.26	<ul style="list-style-type: none"> lack of skilled workforce? not well located in relation to motorways Not a prestige location Public transport 	<ul style="list-style-type: none"> Modern office suites Good access to strategic highway 			
28	Adjacent to	3.8	<ul style="list-style-type: none"> Possible contamination 	<ul style="list-style-type: none"> Re-use vacant and derelict land 		<p>Small site dominated by Cooling Towers may be</p>	

	Power Station							
			<ul style="list-style-type: none"> Potentially difficult to market location Availability of alternative reclaimed land and existing units nearby Public transport not well located in relation to motorways whilst located near to Rugeley, access by foot is limited 	<ul style="list-style-type: none"> Good access to strategic highway 		less attractive in terms of development.		
29	Parchfields Enterprise Park	0.34	<ul style="list-style-type: none"> Small farm based diversification Access and rural location, (security..) not well located in relation to motorways whilst located near to Rugeley, access by foot is limited 	<ul style="list-style-type: none"> Nearby train station Good access to strategic highway 		rural site		
30	Rydal Estate	2	<ul style="list-style-type: none"> impact of decline in manufacturing not well located in relation to motorways 	<ul style="list-style-type: none"> Nearby train station Good access to strategic highway 		rural site		
31	Trent Valley Trading Estate	2.8	<ul style="list-style-type: none"> potential impact on decline in manufacturing not well located in relation to motorways whilst located near to Rugeley, access by foot is limited 	<ul style="list-style-type: none"> Nearby train station Good access to strategic highway Appears fully occupied with few units coming on to the market over recent years 				
38A	Rugeley Power Station	16	<ul style="list-style-type: none"> Rural site Public transport limited to site Potentially difficult to market due to location in relation to strategic highway Adjacent land has been on the market some while Potential landowner interest for long term residential on the site Saved policy 	<ul style="list-style-type: none"> Close to existing and proposed employment New residential development proposed nearby Saved policy 		Site was identified as surplus during the preparation of the 1998 Local Plan, since this time parts of the land are now required for the operation of the Power Station.		
KINGS BROMLEY								
38	Archers	1.8	<ul style="list-style-type: none"> Rural location outside nearby settlement Dated appearance on some of the buildings Number of properties at 2006 for let 	<ul style="list-style-type: none"> Rural diversification Located on frequent bus route although no existing stop 		rural site		

FRADLEY

32	Phase 1	19.7	<ul style="list-style-type: none"> Some small parcels of the site remain undeveloped for several years No facilities or services for employees 	<ul style="list-style-type: none"> Relatively new modern mixed use employment development Direct access to the strategic highway network and connecting motorways Re use of brownfield land Frequent bus route to Lichfield – Burton (longer journey times to Burton) Other employment land adjacent 		
33	Phase 2	140	<ul style="list-style-type: none"> Large site in semi – rural location Public transport limited to buses – ability to accommodate shift patterns very limited Lack of affordable housing for employees Question over the supply of remaining land-should larger land users express further interest, this could reduce land pool substantially Impact of eco-town – new village and remaining land should alternative land uses be sought Concern over predominantly leasehold premises Impact on nearby residents 	<ul style="list-style-type: none"> Relatively new modern mixed use employment development – concern over proportion of site given over to B8 Direct access to the strategic highway network and connecting motorways Re use of brownfield land Frequent bus route to Lichfield – Burton (longer journey times to Burton) Other employment land adjacent 		<p>Potential for all or part of remaining 40-60 ha to come forward for alternative uses as part of the LDF process.</p> <p>Could this enable other sites to come forward as part of the overall employment land requirement set by the RSS?</p>
34	Phase 3	35	<ul style="list-style-type: none"> As Phase 2 Greenfield Already large amount of existing and readily available land for employment nearby Impact on landscape, views to Lichfield and narrowing gap Potential for change to allocated land use in relation to development of new settlement/eco – town No bus route to site at present 	<ul style="list-style-type: none"> Enable potential freehold development Could provide alternative to land remaining with permission on Phase 2 should this come forward for alternative uses 		<p>Review requirement/need for further employment land at Fradley.</p> <p>Potential for all or part of this sites to come forward for alternative uses as part of the LDF process.</p> <p>Could this enable other sites to come forward as part of the overall employment land requirement set by the RSS?</p>
35	Fradley Distribution Park	19.4	<ul style="list-style-type: none"> As Phase 2 Impact on landscape, views to Lichfield and narrowing gap Potential for change to allocated land use in relation to development of new settlement/eco – town No bus route to site at present 	<ul style="list-style-type: none"> Redevelopment and reuse of brownfield site – bringing units up to modern standard Direct access to the strategic highway network and connecting motorways Frequent bus route to Lichfield – Burton (longer journey times to Burton) Other employment land adjacent 		<p>Further redevelopment of this site likely – would contribute to overall RSS figure?</p>
36	Fradley Wood* Not included in ELR	13.5 *rough area	<ul style="list-style-type: none"> As above Likely potential that these 2 areas are to be lost due to new settlement development Poor quality buildings used for storage 	<ul style="list-style-type: none"> Old dated hanger style buildings 		
37	Fradley Auction Centre* Not included in ELR	4.36	<ul style="list-style-type: none"> As above 	<ul style="list-style-type: none"> Modern building 		

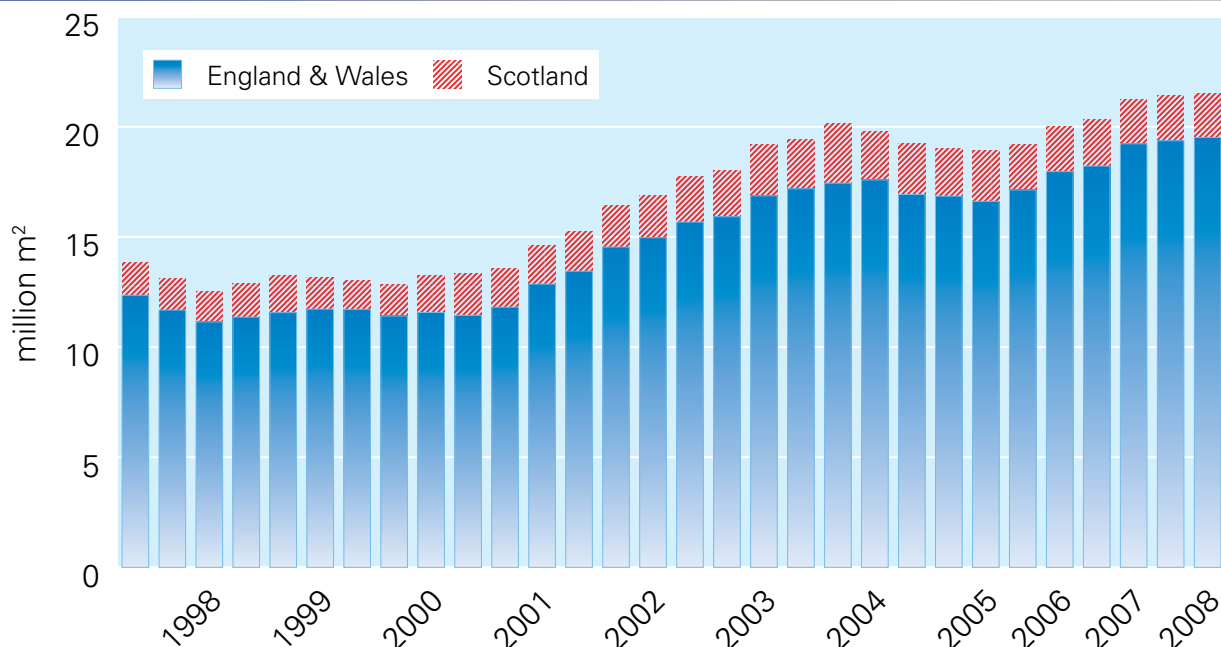
APPENDIX 2

**EXECUTIVE SUMMARY TO KING STURGE INDUSTRIAL & DISTRIBUTION FLOORS
SPACE TODAY SURVEY, SEPTEMBER 2008**

Executive summary

- **Available industrial floorspace** in Great Britain increased by a nominal 0.5% (109,000m²) since December 2007 to 21.527 million m² at June 2008. Though the upward trend in floorspace has been continuous for the sixth consecutive six month period, the level of increase recorded in this survey has moderated again.
- During the first half of 2008, the largest percentage increases in available floorspace were recorded by two of the Northern regions and Wales. The North West was up 4.3%, Yorkshire & Humberside 3.4% and Wales by 3.9%. Nominal increases were recorded in the North (0.2%) and East Anglia (0.4%). Decreases were evident in the South East, down 2.4%, Scotland, down 1.9% and the West Midlands which was down by 1.5%.
- The increase in the **availability of new floorspace** continued with a rise of 6.0% or 168,000m² to 2.965 million m² in Great Britain at June 2008. The new floorspace category accounted for 13.8% of total availability at June 2008.
- **Available floorspace in large buildings** of 10,000m² and over decreased marginally. The 0.8% fall of 49,000m² produced a total of 6.182 million m². This category accounts for 28.7% of the overall available floorspace.
- Speculative development **under construction** across Great Britain has decreased since our last survey, to 711,651m² across 73 schemes. This represents a 43% fall in floorspace under development in July 2008 compared with six months earlier.
- Despite the protracted 'credit crunch', the **UK economy (GDP)** still expanded by 0.4% over the first six months of 2008. GDP growth in the year to June 2008 was 1.6%, the weakest for three years.
- In the year to June 2008, **rental growth** for all industrial property across the UK increased by 1.3%, according to the IPD quarterly index.

Chart 1: Available industrial floorspace



Excludes units below 500 m²

Survey taken in April, August & December

As from 2005, the surveys are taken in June and December

Source: King Sturge Research

APPENDIX 3

**EMPLOYMENT BY SECTOR FOR THE UK, CAMBRIDGE ECONOMETRICS REGIONAL
ECONOMIC PROSPECT SURVEY, JULY 2008**

Regional Economic Prospects - Part 2

EMPLOYMENT IN THE UK

(thousands)

	1980	1990	2000	2005	2006	2007	2008	2009	2010	2015	2020
Agriculture etc	719	653	528	455	444	453	445	418	412	347	306
Mining & quarrying	379	162	78	63	65	69	70	68	67	61	55
Coal	281	87	13	8	8	9	11	10	10	9	8
Oil & natural gas etc	34	41	33	31	34	36	36	35	34	31	28
Other mining	64	34	32	24	24	24	23	23	22	21	19
Manufacturing	6753	5120	4221	3348	3245	3181	3146	3070	3022	2817	2602
Food, drink & tobacco	728	548	505	439	431	429	431	427	423	407	389
Text., cloth. & leather	847	582	312	164	145	137	131	123	120	106	90
Wood & paper	288	255	207	181	170	167	160	157	152	135	118
Printing & publishing	354	397	403	366	359	343	329	324	322	324	323
Manufactured fuels	30	29	27	24	24	24	25	25	24	25	24
Chemicals & MM fibres	409	313	246	209	198	196	193	188	185	167	154
Rubber & plastic products	261	246	252	211	206	207	209	203	200	184	161
Non-metal. mineral prod.	271	214	153	118	116	113	113	110	107	94	80
Basic metals & metal prod.	1076	716	561	432	429	421	418	409	402	372	346
Mechanical engineering	679	500	375	298	287	289	292	285	279	259	237
Electron., elec., inst. eng.	744	574	520	355	341	326	314	303	293	254	216
Motor vehicles	444	256	230	192	180	174	177	171	169	155	142
Other transport equipment	360	242	179	150	149	152	154	148	144	130	116
Other manufacturing	261	247	251	211	210	204	200	198	200	205	208
Electricity, gas & water	307	236	130	103	106	111	115	112	110	100	90
Construction	1856	2351	1857	2064	2117	2187	2217	2199	2216	2328	2469
Services	17363	20561	22662	24878	25214	25431	25493	25721	25966	27247	28415
Distribution	1994	2056	1990	1926	1914	1919	1909	1917	1924	1955	1984
Retailing	2452	2687	2908	3160	3114	3142	3153	3158	3170	3292	3417
Hotels & catering	1326	1708	1816	1981	1972	1989	2001	2011	2028	2156	2236
Transport & comms.	1718	1688	1750	1844	1860	1830	1811	1816	1820	1855	1894
Banking & finance	648	910	878	928	903	910	917	931	945	974	982
Insurance	209	252	240	198	194	197	196	196	198	206	214
Other business services	2132	3313	4387	5098	5302	5465	5514	5614	5720	6223	6734
Public admin. & defence	1985	1798	1604	1756	1750	1741	1727	1722	1714	1710	1698
Education & health	3763	4674	5301	6049	6209	6236	6261	6340	6410	6715	6975
Other services	1135	1475	1787	1938	1996	2001	2004	2017	2036	2161	2279
Total employment	27377	29082	29477	30912	31192	31432	31484	31589	31792	32900	33938

Ref : RFRES, MDM C82F6A July 2008.

APPENDIX 4

NOTE OF STRUCTURED INTERVIEW WITH CARL DURRANT, KING STURGE

LICHFIELD DISTRICT COUNCIL
Future General Employment and Office Development in Lichfield District

Structured Interview of Carl Durrant, King Sturge, 11.00am, Monday 15 September 2008

A) General Employment, Existing Estates and Land Allocations

Q1. What demand is there for traditional industrial floorspace in the region?

There has been a reduction in demand for premises for general manufacturing. There is still demand for industrial buildings. However, demand for existing premises now tends to be light industry, final assembly and distribution.

An example of this is Integra, who used to occupy a factory building in Eastern Avenue, Lichfield. Integra made curtain poles. This product is now made in Asia. Integra no longer require the 75,000 ft² factory. This has been sold, and Integra have now relocated to a much smaller facility for administration and sales.

Demand is still robust for good and reasonable modern accommodation in the right location.

Q2. How does it compare with recent years?

The process described above has been ongoing for many years. There is a continual progression away from heavy manufacturing to lighter industry, trade and distribution uses.

Q3. Are there any particularly noticeable trends in terms of size, quality, etc?

Occupiers of floorspace have become more discerning. They are looking for modern well designed premises. This is to make better efficiencies and for staffing reasons.

Location in terms of access to roads and labour is becoming more important.

The proximity of industrial premises to housing has become more of an issue than it was. This is for environmental reasons (eg noise).

With regard to tenure, there is still a desire for occupiers to own their own premises. This is particularly prevalent with small and medium size business.

With regard to size, with the exception of high bay warehousing (see below), there are no noticeable trends in terms of either enquiries or take up rates.

Q4. Any predictions for the future?

Development has been led recently by the funder, rather than by what the occupier actually has demanded. Essentially, the yield, rather than the rent, has been the principal driver. This is now changing due to the Credit Crunch.

Far less speculative development is now going forward. Instead, there is a greater emphasis on pre-lets, pre-sales and purpose built buildings. This is due to obvious nervousness about funding and changes in void rates legislation.

The Green agenda has had some impact on design. However, the principal performance criteria of buildings remains broadly the same, concerning:-

- Eaves height
- Floor loading
- Loading doors
- Yard

- Parking
- Offices

Q5. *Is there still a demand for big high bay warehouses?*

Yes. There is plenty evidence of healthy take up in recent months. This includes M&S taking the former Littlewoods warehouse of 460,000 ft² at Burton on a 15 year lease between £5 and £5.25 per ft². The very large unit of Tesco at Fradley Park is further evidence.

There is still an ongoing consolidation of company's logistics buildings. Still, there is a trend of combining two or three older hubs into one new big hub. Logistics would be worked harder during any recession. Therefore, this could lead to further rationalisation and consolidation of networks. A good example is Pallett Track who have come out of old second hand premises, with a 5m eaves height, and relocated into 275,000 ft² of new warehousing at Titan 10, Bilston.

Q6. *If so, have the major requirements changed?*

Regional and national distributions centres are still increasing in size. A 250,000 ft² building is no longer abnormal. Tesco, at 810,000 ft², is a good example of how big new distribution units can be.

In addition, more parcel companies and pallet hubs are now being built. These are land hungry, using only 20 to 30% of site cover. These buildings require full circulation and are generally staffed on a 24 hour three shift basis. These buildings can vary between 50,000 to 300,000 ft². A good example is HDL at Ryton, that has taken 220,000 ft² on 33 acres. Parcelforce at Burton is another good example.

This is definitely a growth market, that is based principally on increased use of the internet for shopping. This represents a real structural change, effecting not only retailing, but distribution. This is likely to increase the demand for the number of distribution buildings serving populated areas. This could possibly lead to more sub regional type of hubs, as well as regional distribution units.

The business models of 3PLs are continuing to evolve. This is to meet market forces.

Labour, access to motorways and land remain key requirements for the high bay distribution sector. Accessibility to rail is still not reflected in the market. No premium is being paid for rail hubs. However, it is becoming a factor in the decision making process.

Q7. *What strengths does Lichfield have as a pitch for industrial and distribution property?*

Road connections are strong. The A38 provides good links to the West Midlands, East Midlands and to the North East and Yorkshire and Humberside. The M6 Toll is a positive factor. This provides a rapid road link through the region. However, this road is not yet seeing the weight of commercial traffic (HGVs) as it should. This is because of the pricing.

Lichfield is considered to have a nice environment with very good amenities. It has a good work life balance, with historical interest. In addition, it is accessible for commuting.

Q8. *Weaknesses?*

With the exception of Fradley Park, there is a shortage of deliverable sites that could accommodate 100,000 ft² plus requirements.

There is a question mark about the critical mass of the labour force serving Lichfield. Is it sufficient to cater for further significant growth?

Are there many industrial companies based in Lichfield that will grow?

Q9. *How competitive, compared to other locations in the West Midlands, is Lichfield?*

In terms of price and rent, Lichfield is generally competitive to other primary locations. For example, it is competitive in terms of Tamworth and Hams Hall.

The sites with big landholdings with planning permission (eg Fradley Park) are a big asset to the District. In addition, the A38 has been very competitive in attracting big warehouse development. In conclusion, it is a competitive location.

Q10. *Do you consider the District has a shortage or over provision of employment land and development sites?*

There is no evidence of an over supply of existing stock. Very little evidence of new vacant premises.

There would seem to be no real over provision of employment land. Potentially, there is a shortage, although new development along Eastern Avenue could absorb local demand. The Revelan scheme is 10 acres of land, that could generate approximately 180,000 ft² of floorspace in refurbished and new premises. This will cater for requirements between 2,000 and 50,000 ft². Practical completion is due later this year, with new premises being promoted on a design and build basis. Some of the units have already been sold off the plans and the scheme has gone very well.

Fradley Park has sufficient land to serve the big high bay warehousing market for the foreseeable future.

Chasetown also holds sufficient land. There is no shortage of land here, being in competition with Cannock.

In summary, there is no real shortage of employment land, with the possible exception of Lichfield City. There is a question mark about the delivery of land being promoted by Stoford. However, if this land is deliverable, then it should resolve land supply issues for the City for industrial land.

PJL
King Sturge
19/9/08

APPENDIX 5

**WEST MIDLANDS, KING STURGE INDUSTRIAL & DISTRIBUTION FLOORSPEACE TODAY
SURVEY, SEPTEMBER 2008**

West Midlands

Short-term trend in availability

- Available floorspace in the West Midlands fell by 1.5% (46,000m²) to 3.029 million m² at June 2008.
- At June 2008, floorspace availability in large buildings decreased by 17.4% (203,000m²) to 962,000m². This figure represents 31.8% of the region's total available stock.
- The amount of available new floorspace increased by 3.5% (16,000m²) to 468,000m², equating to 15.5% of the region's overall total at June 2008.

Change over 12 months

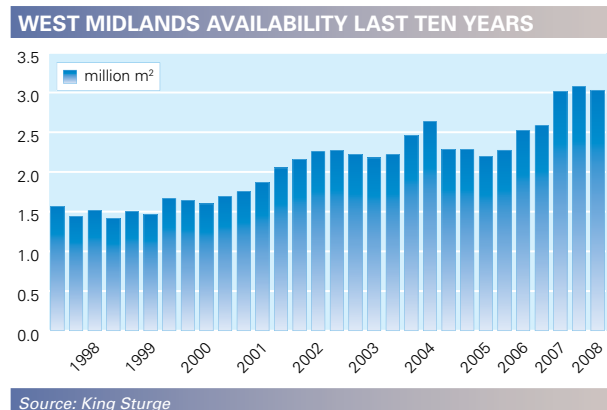
- Available floorspace in the West Midlands was all but static with a nominal increase of 0.4% (13,000m²) during the 12 months to June 2008.
- Floorspace availability in large buildings increased by 3.8% (35,000m²) during this period.
- New available floorspace increased by 19.4% (76,000m²) during the 12-month period.

Existing Schemes

New build

Hollymoor Point is situated at the established Birmingham Great Park, off the A38, in Rubery, Birmingham. The first phase comprises of industrial/warehouse unit 302 which totals 2,612m² and unit 301 which totals 3,788m², including two-storey offices. The smaller unit has been sold to Spanish tile manufacturer, Grespania, for use as its UK distribution centre. The second phase, which is yet to be built, will be able to accommodate up to 8,361m². Units are available on a leasehold or freehold basis.

Titan 10 is part of the redevelopment of the former GKN site at Bilston in the Black Country. This warehouse/distribution centre, which provides 24,831m², has been let to West Midlands-based overnight palletised freight distributors, Pallet Track. The building has an internal height of 12m served by 24 dock level and 4 surface loading doors accessed via a 50m deep yard. (See photograph below.) The motorway network is accessible at junction 10 of the M6 and junctions 1 and 2 of the M5.



Vantage Point, Castle Bromwich, Birmingham is a distribution/production development totalling just over 10,000m². Situated off the A47 Fort Parkway, between junctions 5 and 6 of the M6, the two buildings feature self-contained sites, 10m clear internal height, dock and surface loading doors and fully-fitted offices. Unit 1 totalling 4,687m² has been sold to Roman Originals (ladies clothing), while the larger Unit 2 totalling 6,045m² is available for sale or to let.

Unit 7 Blenheim Way, Fradley Park, Lichfield is a warehouse/industrial building of 9,663m² available to let. On this established park, adjacent to the A38, the facility has a haunch height of 12m, eight dock and four surface loading doors with a secure service yard.

Unit DC3 at Prologis Park Stafford of 6,528m² has been sold to Altecnic. Units DC2 of 11,877m² and DC4 of 21,399m² are to let offering high-bay (12m internal height to haunch) warehouse/distribution accommodation with extensive loading facilities. Offices are included. The park is situated alongside the M6, a short distance from junction 14.

Secondhand

Athena Point, Aston, Birmingham is a factory/warehouse of 9,437m² situated on an attractive, managed estate within 1.5 miles of junction 6 of the M6. Currently undergoing extensive refurbishment, the facility, which includes offices, is to let as a whole or sub-divided from 4,593m².

Unit 1 at Saltley Business Park, Saltley is a modern factory/warehouse of 5,547m² with an office content of 1,172m² available on a leasehold basis.

On Siskin Parkway East, Middlemarch Business Park, Coventry, a production/office building is for sale on a freehold basis. Totalling 3,189m², the accommodation is principally single-storey with an extensive mezzanine floor. Loading is via one loading dock and one ramped surface door.

Emperor Point, Centurion Park, Tamworth is a modern distribution facility of 16,650m² with a new extension of 4,541m². Available to let on a new lease or for sale freehold in its larger form, the building will feature 18



Titan 10, Bilston - let.



dock levellers and three surface loading doors. Junction 10 of the M42 is less than half a mile away.

Speculative development pipeline

The West Midlands has seen a significant decrease in the level of speculative development under construction since our previous survey. The figure now stands at 177,077m² across eight schemes, representing an 110,460m² decrease on January 2008 levels.

Gazeley is currently constructing two large distribution units in the West Midlands, at G Park Rugeley (64,781m²) and the Blue Planet building at Chatterley Valley.

G Park Rugeley is a 40 acre site in Rugeley, Staffordshire. The speculative building currently under construction on this site is expected to complete in the autumn.

The Blue Planet, Chatterley Valley, Stoke on Trent is currently under construction with completion expected before the end of the year. This 34,000m² building incorporates many energy saving features including an on site bio fuel micro power station.

The two buildings at ProLogis Park Midpoint, Birmingham remain under construction. The larger of these two buildings is 29,031m² and the smaller 21,832m². It is now expected that both of these buildings will complete by September. A further two large distribution units are planned on this site.

The two Chancerygate developments noted in our last report have now been combined into one scheme named CBC Central, Millar Street. This development in Birmingham will consist of 29 units totalling 6,511m². Practical completion of this site is now expected by the autumn.

St Modwen is currently constructing two schemes in this region, one in Burton upon Trent, the other in Worcester. In Burton upon Trent the developer is on site with the Centre 36 development at Barton Business Park. This scheme consists of two units of 3,227m² and 2,855m² and is expected to complete in November.

The second St Modwen scheme is the Great Western Business Park in Worcester. This project will total 1,022m² across 18 units and is expected to complete in November 2008. This is the first phase in the development of this site.

Rossway Dowd is currently constructing the Rossway Business Park in Wallsall. This scheme consists of three units, one of which has been pre let. The remaining available units total 929m² and are expected to complete by the end of the summer.

The final scheme under construction is the former Wolverhampton Point scheme, Vernon Park. There are currently three units under construction on this site with space available for a fourth unit on a design and build basis. Units A, B and C total 2,787m², 3,716m² and 5,063m² respectively and provide a combined area

of 11,566m². The developer, Kilmartin Property Group, expects the scheme to complete in December.

Prime rents

Prime rents have once again remained static in the West Midlands over the last six months. They range from £56.50m² in the Black Country to £67.30m² in Solihull.

Prime industrial rents, July 2008

Location	Prime rent (£/m ²)
Birmingham	61.90 - 64.60
Black Country	56.50
Solihull	67.30

Assumes minimum of 1,000 m².

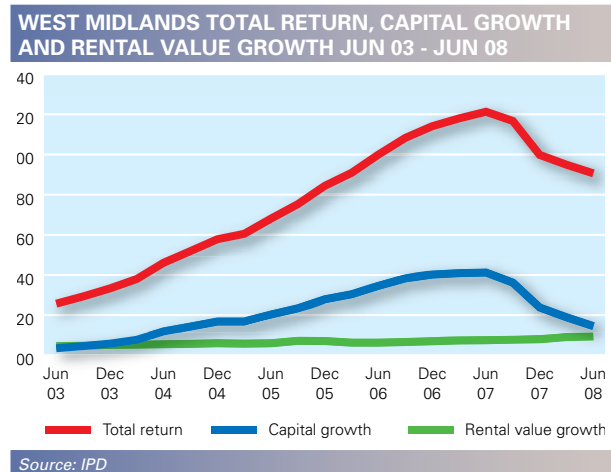
Investment market performance

The industrial market in the West Midlands produced a negative total return of -5.1% in the first half of 2008, according to the IPD Quarterly Index, and -14.7% over the year to June.

Capital growth in the first six months of the year was -8.1% with an annual rate of -19.6% over the 12 months to end June.

Rental values increased by 0.3% in the first half of the year and were 2.0% higher over the 12 months.

We believe prime yields in the West Midlands are around 7¼% for both multi-let estates and large distribution properties.



APPENDIX 6

**EMPLOYMENT BY SECTOR FOR THE WEST MIDLANDS, CAMBRIDGE ECONOMETRICS
REGIONAL ECONOMIC PROSPECTS SURVEY, JULY 2008**

Regional Economic Prospects - Part 2

EMPLOYMENT IN THE WEST MIDLANDS											
	(thousands)										
	1980	1990	2000	2005	2006	2007	2008	2009	2010	2015	2020
Agriculture etc	44	70	49	45	44	43	43	39	38	29	23
Mining & quarrying	24	12	4	2	2	2	2	2	2	2	2
Coal	19	8	1	0	1	1	1	1	1	1	1
Oil & natural gas etc	0	0	0	0	0	0	0	0	0	0	0
Other mining	5	3	3	1	1	1	1	1	1	1	1
Manufacturing	865	668	536	393	378	362	355	347	341	319	296
Food, drink & tobacco	53	47	39	35	35	36	36	36	36	35	35
Text., cloth. & leather	59	53	22	12	11	10	10	9	9	8	7
Wood & paper	17	19	16	14	17	16	16	15	15	13	12
Printing & publishing	21	29	23	21	19	17	16	16	16	16	16
Manufactured fuels	1	1	1	1	1	1	1	1	1	1	1
Chemicals & MM fibres	21	17	12	11	10	9	9	9	9	8	7
Rubber & plastic products	47	44	36	25	24	24	23	23	22	20	17
Non-metal. mineral prod.	57	51	36	21	19	17	17	17	16	14	12
Basic metals & metal prod.	252	159	131	91	92	88	86	84	82	77	74
Mechanical engineering	92	74	57	43	45	44	44	42	41	37	33
Electron., elec., instr. eng.	84	60	53	33	30	28	26	25	24	20	16
Motor vehicles	116	69	72	56	46	43	43	43	42	40	38
Other transport equipment	20	14	11	9	9	8	9	8	8	7	6
Other manufacturing	27	31	27	23	21	20	19	19	20	23	24
Electricity, gas & water	30	21	16	11	11	11	11	11	10	9	8
Construction	159	197	160	168	175	185	187	186	187	198	211
Services	1388	1682	1820	2037	2069	2079	2080	2102	2124	2220	2302
Distribution	183	206	202	197	191	195	187	188	189	191	193
Retailing	194	235	242	270	264	262	261	261	263	276	288
Hotels & catering	113	146	141	156	163	167	170	170	172	184	192
Transport & comms.	112	124	140	151	154	148	143	143	143	149	153
Banking & finance	47	66	58	62	57	55	56	57	57	60	61
Insurance	16	16	15	13	13	13	13	13	14	14	14
Other business services	187	264	315	388	403	412	417	427	436	462	485
Public admin. & defence	144	127	108	126	125	125	124	124	123	124	124
Education & health	299	385	464	528	542	544	548	556	564	594	622
Other services	92	114	134	147	157	159	161	161	162	167	171
Total employment	2509	2650	2586	2655	2679	2682	2678	2686	2702	2777	2842
Ref	: KHRES, MDM C82F6A July 2008										

APPENDIX 7

LOGISTICS PROPERTY TODAY, KING STURGE, SPRING 2008

LOGISTICS PROPERTY TODAY

Spring 2008

Welcome to the Spring 2008 edition of *Logistics Property Today*.

This bulletin is produced twice yearly, in Spring and Autumn, and reports on the latest trends in the logistics property market across Great Britain. It presents our latest data on take-up, availability, rents and land values, focusing on new units of 10,000m² and over.

Our cover story in this edition focuses on rail freight and the demand for rail-linked warehouses, following the recent decision by the government to grant planning permission for ProLogis Park, Howbury, a major rail-connected site in south east London.

A new chance for rail freight?

Ever since the Channel Tunnel opened for freight in 1994, a number of property developers and investors have sought to provide rail-connected intermodal and warehouse facilities to service requirements for rail-based distribution. Hence in the second half of the 1990's a number of 'first generation' strategic rail freight interchange (SRFI) sites were developed, including Daventry, Hams Hall, Wakefield Europort and Mossend among others.

The actual growth in international traffic through the Channel Tunnel did not, however, live up to expectations. Indeed, official figures show that freight volumes through the Channel Tunnel have fallen. However, other parts of the rail freight market have grown, including the domestic intermodal market, which is itself partly driven by the maritime market involving the movement of containers from ports. Developers are now responding to this growth and to a range of other factors, including rising road congestion, rising fuel prices, labour shortages and the growing interest in sustainable distribution, to bring forward a 'second generation' of SRFI sites.

In December 2007 the Government gave the go ahead for ProLogis Park, Howbury, a 195,000 m² (2.1 million ft²) rail-linked park and, following this, ProLogis launched its National Rail Freight Strategy to provide a range of further SRFIs, including Daventry II (185,800 m²/ 2 million ft²) and ProLogis Parkside (nearly 743,200 m²/ 8 million ft²) and other rail connected sites. In addition, HelioSlough has taken its proposals for a 325,161 m² (3.5 million ft²) SRFI at the former Radlett Aerodrome site

through a Public Inquiry and a decision is expected shortly. Kilmartin, which recently acquired Kilbride, the rail related development specialist, also has plans for a network of terminals across the UK.

Official figures show that rail freight accounts for approaching 9% of domestic freight transport by mode in Great Britain (measured by tonne kilometres). This is well behind road freight, the dominant mode of distribution, which has a 63% share. Water and pipeline account for 24% and 4% respectively.

Much of the rail freight market consists of coal, metal and construction material, which in total accounted for some 62% of total freight moved in 2006-07(22.2 billion net tonne kilometres) the last year from which annual data are available.



Hams Hall, Birmingham

These sectors tend to be serviced by their own terminals and do not usually generate significant requirements for warehousing.

By contrast, the most relevant traffic in this respect is the domestic intermodal market and the international market. The former accounted for 4.6 billion net tonne kms, or 21% of the total in 2006-7, whilst the latter, which includes Channel tunnel traffic, only accounted for 0.5 billion net tonne kms, 2% of the total.

These two markets have experienced different growth patterns. The domestic intermodal market has been growing, with freight movement 35% higher in 2006-07 compared with 2002-03. A key driver in this respect has been the growth of containers handled by UK ports, with Felixstowe, the UK's largest container port handling some 23% of its UK domestic throughput by rail. In addition, a range of major companies, including Tesco are using intermodal services for relatively long haul transport movements.

In contrast to this market, the international market has been flat, with freight moved in 2006-07 unchanged since 2002-03. This market has been constrained by problems associated with Channel Tunnel operations including recent industrial action by SNCF, the French railway company. For example, we understand that DHL has recently closed down its rail freight service (based at Daventry) for Marks & Spencer, following the last SNCF strike just before Christmas 2007. This service had formerly imported wine from Europe but all of this traffic is now being handled by road.

From a property perspective, it is clear that a demand for rail freight does not necessarily lead to a demand for facilities on a rail-connected site. For example, users of intermodal facilities may be located in standard warehousing in the surrounding area, although they can generally minimise transport costs by locating on intermodal sites and eliminating or minimising the road transport leg. In addition, comparatively few users can justify having a dedicated rail-connected warehouse as these are normally only viable where the user is moving large volumes by rail, preferably in both directions (ie inbound and outbound). That said, there are examples of companies that are successfully using dedicated rail-connected warehouses, including DHL which operates a rail-linked warehouse at ProLogis Park, Coventry to bring bottled mineral water in from France for Danone, and WH Malcolm, which handles fast moving consumer goods for a variety of customers from its rail-connected warehouse at Daventry.

Looking forward, we believe that a number of factors are coming together which will encourage rail freight to grow and generate more demand for warehouses on SRFI sites or other type of rail-connected sites. Some of these are related to the investment being put into the rail network to tackle bottlenecks, including gauge enhancement on critical routes, whilst others reflect the investment being put in by the property industry in terms of bringing forward rail-connected sites. In addition, with road congestion set to deteriorate, road transport costs escalating and greater attention being paid by businesses to sustainable distribution, companies have a strong rationale to look at the rail alternative.



NEWS & STORIES

M2, Heywood Distribution Park

King Sturge recently acted on behalf of SEGRO in the letting of a 9,569 m² (103,000 ft²) logistics warehouse at M2 Heywood Distribution Park to Eddie Stobart.

The park is situated just 1 mile from Junction 3 of the M66 and 2 miles from Junction 18 of the M62.



For further information contact David Brooks 0161 238 6239 ■

Alpha Plus, St Neot's

King Sturge is joint letting agent for Alpha Plus at St Neot's in Cambridgeshire. The developer is Miller Developments and CPPL.

Alpha Plus is a new 20,440 m² (220,015 ft²) B8 Distribution unit located at the junction of the A1 trunk road and the A428 Cambridge to Bedford Road. The building, is available for immediate occupation.



For further information contact James Swallow: 020 7087 5312 ■

London Gateway, Thurrock, Essex

In May 2007, DP World was given the go ahead for London Gateway in Thurrock, Essex. Just 30 miles from central London, the £1.5 billion development provides nearly 1 million m² (10 million ft²) of logistics/ business space and will be built on a former oil refinery site on the north bank of the Thames Estuary. Adjacent to the logistics park will be the first major new deep-sea port in the UK for 25 years, and will have a capacity of up to 3.5 million TEU's. King Sturge has been retained as consultants throughout the acquisition and planning process and is acting as leasing agent for the logistics/business park at London Gateway.



For further information contact: Jim Franks: 0207 087 5311 ■

Rivet, Coventry

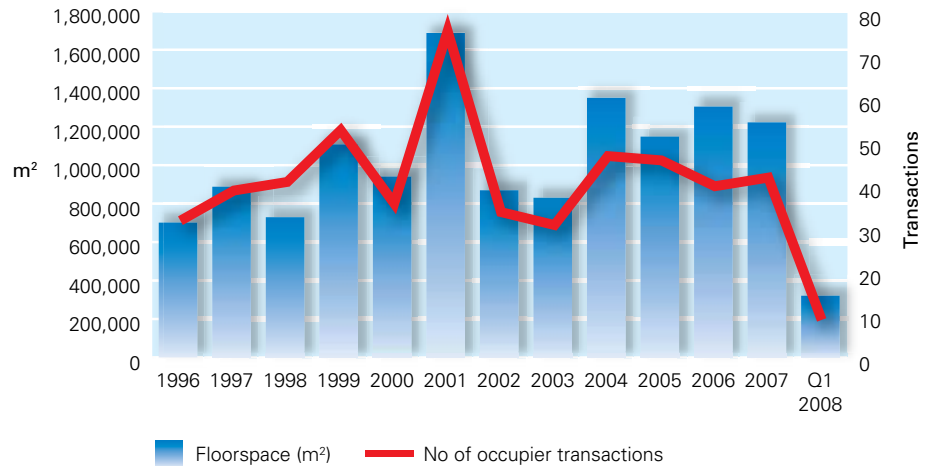
King Sturge is instructed to market this newly completed industrial / distribution building of 18,677 m² (201,033 ft²), with 3 storey offices of 2,003 m² (21,565 ft²). It is prominently located on the Waterman Road roundabout of the A444 Phoenix Way. Phoenix Way runs due south from Junction 3 of the M6 to Coventry and meets Waterman Road after 4.7 miles.

OCCUPIER DEMAND

The national picture

In the first three months of 2008 some 330,290 m² (3,555,207 ft²) was taken-up in nine new distribution units across Britain (involving units of 10,000 m² and over). This is a stronger start in floorspace terms compared to the same time last year, when 266,695 m² (2,870,775 ft²) was taken up in 11 units. This follows a relatively good year in 2007, when take-up totalled 1.2 million m² (13 million ft²).

Take-up of new logistics facilities of 10,000 m² and over in GB



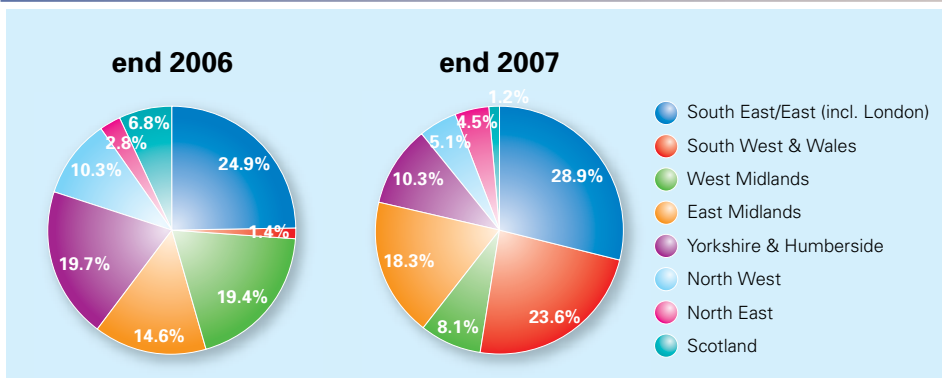
Source: King Sturge

The level of speculative development has continued to increase, according to our latest figures (see Supply section). Looking ahead, therefore, we would expect to see a higher rate of speculative take-up over 2008.

Regions

Over 2007 as a whole, South East, London and Eastern regions combined accounted for the largest percentage share of floorspace taken-up with 28.9% of the total floorspace transacted. This represents an increase in market share of 4 percentage points compared to 2006. The next largest share of take-up was accounted by the East and West Midlands, which together accounted for 26.4%. This was significantly lower than the 2006 level of 34%. The West Midlands take-up share was 8.1% and the East Midlands was 18.3%. Considered together, the South West and Wales have increased significantly their market share from 1.4% in 2006 to 23.6% in 2007. The share of take-up in Yorkshire and Humberside fell to 10.3% in 2007, down from 19.7% in 2006. The North West's share decreased from 10.3% a year ago to 5.1%, whilst the North East saw a modest increase from 2.8% a year ago to 4.5%. Scotland lost market share, falling from 6.8% in 2006 to 1.2% in 2007.

Regional take-up of new logistics facilities of 10,000 m² and over in GB



Source: King Sturge

NEWS & STORIES



For further information contact Carl Durrant 0121 200 7147 ■

Lymedale 415 at Lymedale Cross, Newcastle-under-Lyme

Developed by HelioSlough, this is a new speculative high-bay distribution unit of 36,461 m² (414,000 ft²) currently available. King Sturge is acting as joint letting agent. The property is situated in a strategic location with direct access off the A34 providing swift access to junctions 15 and 16 of the M6.



For further information contact David Brooks 0161 238 6239 ■

Pe2, Peterborough

King Sturge is a joint agent on this 12,156 m² (130,850 ft²) new warehouse / production development by Wrenbridge. Pe2 is located in Peterborough and is strategically positioned just off the A1(M). It is ideal for distribution and manufacturing as 85% of Britain's population is located within a 4.5 hour HGV drive time. Specification includes 12 m clear internal height, 48 metre yard depth, 10 dock level doors, 2 surface level doors, 30 HGV / trailer spaces, 45 car parking spaces.



For further information contact Jim Frankis 020 7087 5311 ■

Magnum 25, Waltham Cross

A new high bay distribution facility of 16,525 m² (177,900 ft²) alongside the M25 London Orbital Motorway. The building has 14 dock level loading doors, 143 car parking spaces and fitted offices over 2 floors. The property is fund managed by Henderson Global Investors and is available to lease or buy.



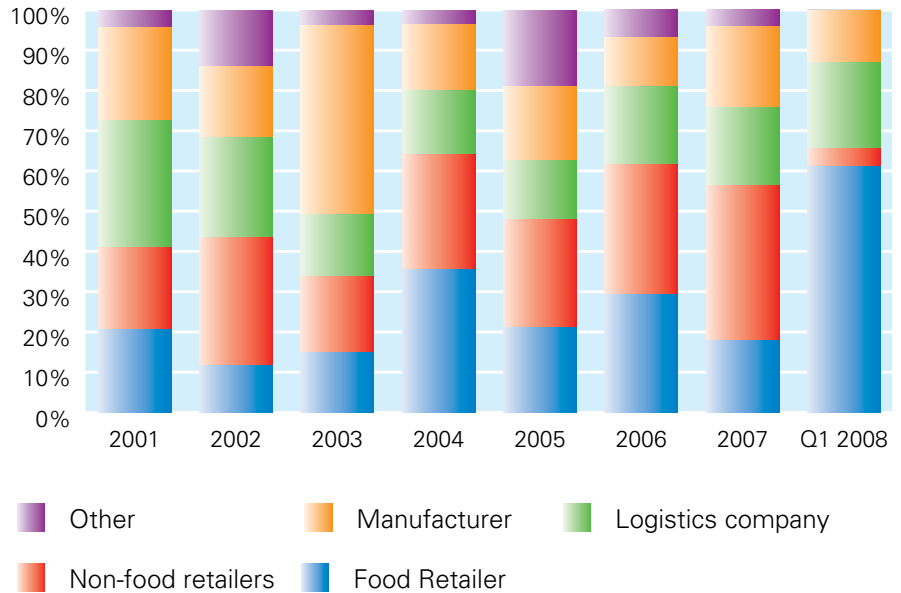
For further information contact: John Porter: 0207 087 5295 ■

Sectors

In 2007, take-up in new logistics facilities over 10,000 m² was relatively evenly spread between sectors. However, if counted together, the non-food retailers and food retailers dominated take-up, taking a combined floorspace share of 56.6%.

In Q1 2008, the food retailers accounted for a huge market share of 61% of the floorspace, with the share of non-food retailers substantially reduced to 4%. Logistics companies accounted for a share of 22% of the market, with manufacturers taking 13%.

Take-up of new logistics facilities of 10,000 m² and over by sector

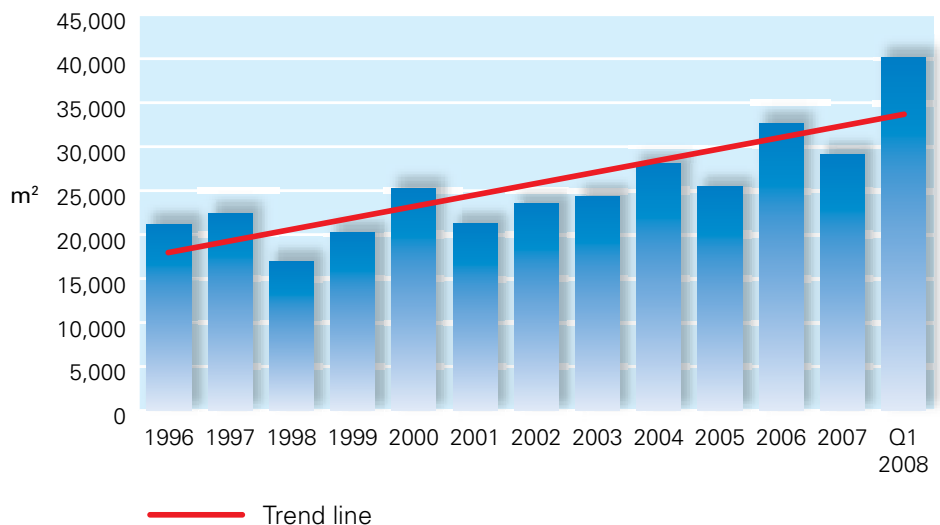


Source: King Sturge

Size Analysis

The average size of units over 10,000 m² taken up in new logistics facilities dipped slightly in 2007 to 29,101 m² (321,582 ft²). At the end of 2006 it had stood at its highest level in 10 years at 32,625 m² (351,173 ft²). At the end of Q1, 2008 it is at 40,124 m² (431,891 ft²) which is particularly high. This is mainly attributable to two large transactions: 83,612 m² (900,000 ft²) pre-let at G Park, Sittingbourne and 111,484 m² (1,200,000 ft²) at Northern Gateway, Teesport.

Average size of unit taken-up in new logistics facilities of 10,000 m² and over



Source: King Sturge

NEWS & STORIES

The Green Giant, Markham Vale

King Sturge is the sole agent on this 54,394m² (585,500ft²) new design and build warehouse / production opportunity, to be developed by Henry Boot in conjunction with Derbyshire County Council. This distribution warehouse is part of a 200 acre development in North Derbyshire. It will benefit from direct access to the M1 motorway from a bespoke new junction (29a) and has a catchment of over 49.7 million people within a 4 hours drive time.



For further information please contact Matthew Smith 0115 908 2123 ■

Unit 75, Midpoint 18, Middlewich, Cheshire

King Sturge is a joint agent on Unit 75 at Midpoint 18, Middlewich. This is a speculative development, comprising circa 32,515 m² (350,000 ft²). The facility is cross docked, is sub divisible and is available freehold or leasehold. In addition, the Development Partnership of Pochin and Northridge Capital, own/control substantial, adjoining landholdings. This allows them to accommodate additional requirements to suit occupier needs, which may include additional trailer parking, offices or the ability to expand in the future.



For further information contact David Brooks 0161 238 6239 ■

SIRFT, Sheffield

King Sturge is marketing this scheme which is located to the east of Sheffield between Junction 33 and 34 of the M1, opposite Sheffield International Airport. HelioSlough has commenced construction of the first phase of SIRFT. The development will comprise up to 80,000 m² (861,100 ft²) of rail-connected warehousing and distribution facilities. There are currently 2 speculative developments under construction of 30,889 m² and 26,895 m² (322,500 ft² and 289,500 ft²) which could potentially be combined to create one large unit, and they are due to be completed in December this year.



For further information contact Richard Harris 0113 235 5249 ■

SUPPLY

Speculative development

The level of new speculatively built logistics space available in units over 10,000 m² has continued to increase in 2008. At the end of Q1 2008, some 2.6 million m² was available in 107 newly completed warehouses and in units under construction on a speculative basis. This represents a 26.5% increase on the same period a year ago and an 19.4% increase on six months ago.

In the size band 10,000 m² to 24,999 m² the number of units available/under construction has increased from the same period a year earlier, from 57 to 69 while actual floorspace in this size band increased by 20%.

The 25,000 m² to 49,999 m² size band also saw a notable increase from one year ago. The number of units available/under construction increased from 23 to 30, which represented an extra 251,303 m² of floor space, an increase of 32.9%.

Available* logistics facilities of 10,000 m² and over, end March 2008

Size band	No. of units	Total floorspace (m ²)
10,000 to 24,999 m ²	69	1,139,756
25,000 to 49,999 m ²	30	1,014,756
50,000 m ² and over	8	466,197
Total	107	2,620,709

* Available schemes comprise newly completed buildings and units under construction

Of the available space outlined above, ProLogis held the largest share at 24%. Rockpoint (which acquired the majority of Gladman stock at the end of 2006) had the second largest share at 11%. Gazeley was next with a 10% share, followed closely by HelioSlough at 7%. Goodman (formerly Macquarie Goodman) had 5% of the available floorspace.

The level of speculative developments on the market currently reflect past decisions to build but we believe speculative development will moderate in the short-term as market conditions and finance become more difficult and developers have to take account of empty rates.

Land supply and land values

In the past 12 months prime logistics land values moved up in only one out of ten regions across Britain and decreased slightly in two other regions. Land values in the majority of regions have remained unchanged.

Prime logistics land values in the South West have risen by £50,000 an acre, which represented an increase of 17%.

In the East and West Midlands prime logistics land values decreased slightly by £25,000 (5.3%) and £50,000 (8.3%) respectively.

Logistics Land Values, March 2008

Region	£ per acre
South East (excl. Heathrow)	850,000-1,200,000
West Midlands	550,000
*East Anglia	300,000-400,000
South West	350,000
East Midlands	250,000-450,000
North West	250,000-350,000
Yorkshire & Humberside	250,000-300,000
Scotland	150,000-300,000
Wales (south)	225,000-250,000
North East	150,000-175,000

Note: Land values are based on prime locations
*Land values for East Anglia exclude Cambridge

RENTS

The South East has the highest prime rents for large logistics facilities at between £6.50 and £8.25 per ft² (excluding Heathrow), followed by the West Midlands at £5.25-£6.00 per ft², then the South West at £5.50-£5.75 per ft². Elsewhere in Britain, prime rents range from £4.00-£4.50 per ft² in the North East to £5.00-£5.50 per ft² in East Anglia.

Prime logistics rents

Region	£ per ft ²
South East (excluding Heathrow)	6.50-8.25
West Midlands	5.25-6.00
East Anglia	5.00-5.50
South West	5.50-5.75
East Midlands	4.75-5.50
North West	4.25-5.00
Yorkshire & Humberside	4.25-4.75
Scotland	5.25-5.50
Wales	4.50-5.00
North East	4.00-4.50

INVESTMENT COMMENT

There has been limited activity in the big shed investment market since we published the Autumn 2007 edition of Logistics Property Today.

In general, over the past six months the market has been characterised by weaker investor demand and a reduction in available good quality stock. The market at present is driven by debt-backed buyers and covenant is paramount.

Reflecting demand and supply, there are very few transactions to report, although probably the most significant involved Sainsbury's sale and leaseback of four large distribution properties in Tamworth, Hams Hall, Haydock and Stoke. All of these properties were let to Sainsbury's for 25 years with fixed compound rate rent increases to 3.21% on a five yearly basis and were sold at yields between 5.65% to 5.90%.

The yields paid in these sale and leaseback deals do not reflect the general tone of yields, with the typical level of yields for prime distribution product around 6% for 15-year income and 7 to 7¼% for 10-year income, depending on the location and tenant.

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APPENDIX 8

**SCHEDULE OF VACANT AND AVAILABLE INDUSTRIAL FLOORSPACE IN LICHFIELD
DISTRICT, SORTED BY SIZE**

Industrial Vacancy Schedule 20.08.08 In size order					
Ref No	Address	Location	Size Sq ft	Owner/Agent	Source
1	Unit 2 Greenhough Road, Lichfield	Lichfield	870		Focus
2	15A Mill Park, Hawks Green Industrial Estate	Burntwood	970	Andrew Dixon & Co	Website
3	7 Newlands Court, Burntwood Business Park	Burntwood	1,010	Burley Browne	Board
4	Unit 2, Crompton Court, Burntwood Business Park	Burntwood	1,142	Andrew Dixon & Co	Board
5	Unit 7, Mount Road Trading Estate, Burntwood	Burntwood	1,365	Simon Murphy Chartered Surveyors	Board
6	Unit 10b, New Road Industrial Estate	Burntwood	1,420	Kincaid & Co	Board
7	Unit 18C Cobbett Road, Zone 1, Burntwood Business Park, Burntwood	Burntwood	1,472	Kingston	Board
8	Units 1A, Burntwood Business Park Zone 4	Burntwood	1,520	L&C P	Board
9	Units 1B, Burntwood Business Park Zone 4	Burntwood	1,520	L&C P	Board
10	Units 1C, Burntwood Business Park Zone 4	Burntwood	1,520	L&C P	Board
11	Unit 37, Britannia Way, Britannia Enterprise Park	Lichfield	1,636	Kingston	Board
12	Unit 3, Prospect House Business Park	Fazeley	1,650	Kingston	Website
13	Unit 50, Tolson Mill, Mill Lane, Fazeley	Fazeley	1,684	Peter Hicks	Board
14	Units 6A, Burntwood Business Park Zone 4	Burntwood	1,758	L&C P	Board
15	Units 6B, Burntwood Business Park Zone 4	Burntwood	1,758	L&C P	Board
16	Units 6C, Burntwood Business Park Zone 4	Burntwood	1,758	L&C P	Board
Subtotal			23,053		
Ref No	Address	Location	Size Sq ft	Owner/Agent	Source
17	Units 7, Riverside Industrial Estate, Power Station, Rugeley	Rugeley	2,050	Andrew Dixon & Co	Website
18	Unit 8, Riverside Industrial Estate, Power Station, Rugeley	Rugeley	2,050	Andrew Dixon & Co	Website
19	Unit 9, Kimberley Business Park, The Levels, Brereton Business Park	Rugeley	2,130	Pritchard Group	Website
20	Unit 2, Prospect House Business Park	Burntwood	2,250	Kingston	Website
21	Unit 17, Britannia Way, Enterprise Park, Lichfield	Lichfield	2,870	Kingston	Board
22	Velina House, Chase Road, Burntwood	Burntwood	3,414	Andrew Dixon & Co	Board
23	Unit 3, Beechwood Business Park	Burntwood	3,470	Andrew Dixon & Co	Website
24	Unit 22, Zone 3 Burntwood Business Park	Burntwood	3,690	L&C P	Board
25	Unit 19A, Chasewater Heaths, Cobbett Road, Burntwood Business Park	Burntwood	3,912	Kingston	Board
26	Unit 19B, Chasewater Heaths, Cobbett Road, Burntwood Business Park	Burntwood	3,912	Kingston	Board
27	Unit 19C, Chasewater Heaths, Cobbett Road, Burntwood Business Park	Burntwood	3,912	Kingston	Board
28	Unit 19D, Chasewater Heaths, Cobbett Road, Burntwood Business Park	Burntwood	3,912	Kingston	Board
29	Unit 19E, Chasewater Heaths, Cobbett Road, Burntwood Business Park	Burntwood	3,912	Kingston	Board
30	Unit 19F, Chasewater Heaths, Cobbett Road, Burntwood Business Park	Burntwood	3,912	Kingston	Board
31	Unit 11, Riverside Industrial Estate, Power Station, Rugeley	Rugeley	4,100	Andrew Dixon & Co	Website
32	Unit 12, Riverside Industrial Estate, Power Station, Rugeley	Rugeley	4,100	Andrew Dixon & Co	Website
33	Unit 27/28, Chasewater Court, Burntwood Business Park	Burntwood	4,739	Kingston	Board
34	Unit 23, Burntwood Business Park	Burntwood	4,635	Andrew Dixon & Co	Website
Subtotal			62,970		
Ref No	Address	Location	Size Sq ft	Owner/Agent	Source
35	Unit 3, Ringway Industrial Estate, Eastern Avenue	Lichfield	5,011	Kingston	Website
36	Unit 9, New Road Industrial Estate, Burntwood	Burntwood	5,300	Kincaid & Co	Board
37	1 Canal View Business Park, Rugeley	Rugeley	5,460	Andrew Dixon & Co	Website
38	Unit 5A, Zone 2 Burntwood Business Park	Burntwood	5,849	L&C P	Board
39	Unit 5B, Zone 2 Burntwood Business Park	Burntwood	5,849	L&C P	Board
40	Unit 1, Prospect House Business Park	Burntwood	6,300		
41	Unit 17, Zone 3, Burntwood Business Park	Burntwood	7,275	Andrew Dixon & Co	Board
42	Unit 3, Key Point, Towers Business Park	Rugeley	8,320	Andrew Dixon & Co	Board
43	Unit 4, Key Point, Towers Business Park	Rugeley	8,320	Andrew Dixon & Co	Board
44	Unit F, Riverside Industrial Estate, Fazeley	Fazeley	8,341	Calders	Board
45	Storage Rooms, Fradley Business Centre, Fradley Park	Fradley	8,460	Kingston	Board
46	Unit O, Riverside Industrial Estate, Fazeley	Fazeley	9,621	Calders	Board
47	Storage space, Shenstone, Lichfield	Shenstone	10,000	Mldshires	Website
Subtotal			94,106		
Ref No	Address	Location	Size Sq ft	Owner/Agent	Source
48	Unit 4, Newlands Court, Burntwood Business Park	Burntwood	10,070	Kingston	Board
49	Unit 5C, Plant Lane Business Park, Plant Lane, Burntwood Business Park	Burntwood	11,618	Kingston	Board
50	Unit 1A, Ringway Industrial Estate	Lichfield	14,572	Kingston	Board
51	Unit 4 (will divide), Zone 3 Burntwood Business Park	Burntwood	20,000	L&C P	Board
52	Unit 2, Zone 4 Burntwood Business Park	Burntwood	21,195	L&C P	Board
53	Unit 2, Plant Lane Business Park, Plant Lane, Burntwood Business Park	Burntwood	24,778	Harris Lamb	Board
Subtotal			102,234		
Ref No	Address	Location	Size Sq ft	Owner/Agent	Source
54	Unit A, Redstart Business Park, Mount Road, Burntwood	Burntwood	38,268		Focus
55	Unit B, Redstart Business Park, Mount Road, Burntwood	Burntwood	27,389	Andrew Dixon & Co	Website
56	Unit C, Redstart Business Park, Mount Road, Burntwood	Burntwood	47,985		Focus
57	Unit 4, Fradley Park, Fradley, Lichfield	Fradley	29,250	GVA	Board
58	Unit 3, Plant Lane Business Park, Plant Lane, Burntwood Business Park	Burntwood	29,720	Kingston	Board
59	Chase Park Industrial Estate, Chase Terrace, Burntwood	Burntwood	34,578	Andrew Dixon & Co	Website
60	Paget 12, Zone 3, Burntwood Business Park	Burntwood	35,891	L&C P	Board
61	Interchange Park, Trent Valley Road, Lichfield	Lichfield	43,500	Kingston	Board
Subtotal			286,579		
Ref No	Address	Location	Size Sq ft	Owner/Agent	Source
62	Fradley Park, Fradley, Lichfield	Fradley	52,500	GVA	Board
63	3 Trent Valley Road, Lichfield (former GKN Building)	Lichfield	72,000		Focus
64	Unit 5, Dove Close, Fradley Park, Fradley	Fradley	55,121	Kingston	Board
65	Unit 7, Blenheim Way, Fradley Park	Fradley	104,014	GVA	Board
Subtotal			283,635		
TOTAL			852,577		
PS					
King Sturge					
18.08.08					

APPENDIX 9

SCHEDULE OF VACANT AND AVAILABLE INDUSTRIAL FLOORSPACE IN LICHFIELD DISTRICT, SORTED BY LOCATION

Industrial Vacancy Schedule 20.08.08 by location

Ref No	Address	Location	Size Sq ft	Owner/Agent	Source
1	15A Mill Park, Hawks Green Industrial Estate	Burntwood	970	Andrew Dixon & Co	Website
2	7 Newlands Court, Burntwood Business Park	Burntwood	1,010	Burley Browne	Board
3	Unit 2, Crompton Court, Burntwood Business Park	Burntwood	1,142	Andrew Dixon & Co	Board
4	Unit 7, Mount Road Trading Estate, Burntwood	Burntwood	1,365	Simon Murphy Chartered Surveyors	Board
5	Unit 10b, New Road Industrial Estate	Burntwood	1,420	Kincaid & Co	Board
6	Unit 18C Cobbett Road, Zone 1, Burntwood Business Park, Burntwood	Burntwood	1,472	Kingston	Board
7	Units 1A, Burntwood Business Park Zone 4	Burntwood	1,520	L&C P	Board
8	Units 1B, Burntwood Business Park Zone 4	Burntwood	1,520	L&C P	Board
9	Units 1C, Burntwood Business Park Zone 4	Burntwood	1,520	L&C P	Board
10	Units 6A, Burntwood Business Park Zone 4	Burntwood	1,758	L&C P	Board
11	Units 6B, Burntwood Business Park Zone 4	Burntwood	1,758	L&C P	Board
12	Units 6C, Burntwood Business Park Zone 4	Burntwood	1,758	L&C P	Board
13	Unit 2, Prospect House Business Park	Burntwood	2,250	Kingston	Website
14	Velina House, Chase Road, Burntwood	Burntwood	3,414	Andrew Dixon & Co	Board
15	Unit 3, Beechwood Business Park	Burntwood	3,470	Andrew Dixon & Co	Website
16	Unit 22, Zone 3 Burntwood Business Park	Burntwood	3,690	L&C P	Board
17	Unit 19A, Chasewater Heaths, Cobbett Road, Burntwood Business Park	Burntwood	3,912	Kingston	Board
18	Unit 19B, Chasewater Heaths, Cobbett Road, Burntwood Business Park	Burntwood	3,912	Kingston	Board
19	Unit 19C, Chasewater Heaths, Cobbett Road, Burntwood Business Park	Burntwood	3,912	Kingston	Board
20	Unit 19D, Chasewater Heaths, Cobbett Road, Burntwood Business Park	Burntwood	3,912	Kingston	Board
21	Unit 19E, Chasewater Heaths, Cobbett Road, Burntwood Business Park	Burntwood	3,912	Kingston	Board
22	Unit 19F, Chasewater Heaths, Cobbett Road, Burntwood Business Park	Burntwood	3,912	Kingston	Board
23	Unit 23, Burntwood Business Park	Burntwood	4,635	Andrew Dixon & Co	Website
24	Unit 27/28, Chasewater Court, Burntwood Business Park	Burntwood	4,739	Kingston	Board
25	Unit 9, New Road Industrial Estate, Burntwood	Burntwood	5,300	Kincaid & Co	Board
26	Unit 5A, Zone 2 Burntwood Business Park	Burntwood	5,849	L&C P	Board
27	Unit 5B, Zone 2 Burntwood Business Park	Burntwood	5,849	L&C P	Board
28	Unit 1, Prospect House Business Park	Burntwood	6,300		
29	Unit 17, Zone 3, Burntwood Business Park	Burntwood	7,275	Andrew Dixon & Co	Board
30	Unit 4, Newlands Court, Burntwood Business Park,	Burntwood	10,070	Kingston	Board
31	Unit 5C, Plant Lane Business Park, Plant Lane, Burntwood Business Park	Burntwood	11,618	Kingston	Board
32	Unit 4 (will divide), Zone 3 Burntwood Business Park	Burntwood	20,000	L&C P	Board
33	Unit 2, Zone 4 Burntwood Business Park	Burntwood	21,196	L&C P	Board
34	Unit 2, Plant Lane Business Park, Plant Lane, Burntwood Business Park	Burntwood	24,778	Harris Lamb	Board
35	Unit B, Redstart Business Park, Mount Road, Burntwood	Burntwood	27,389	Andrew Dixon & Co	Website
36	Unit 3, Plant Lane Business Park, Plant Lane, Burntwood Business Park	Burntwood	29,720	Kingston	Board
37	Chase Park Industrial Estate, Chaeese Terrace, Burntwood	Burntwood	34,578	Andrew Dixon & Co	Website
38	Page 12, Zone 3, Burntwood Business Park	Burntwood	35,891	L&C P	Board
39	Unit A, Redstart Business Park, Mount Road, Burntwood	Burntwood	38,266		Focus
40	Unit C, Redstart Business Park, Mount Road, Burntwood	Burntwood	47,985		Focus
Subtotal			394,947		
Ref No	Address	Location	Size Sq ft	Owner/Agent	Source
41	Unit 3, Prospect House Business Park	Fazeley	1,650	Kingston	Website
42	Unit 50, Tolson Mill, Mill Lane, Fazeley	Fazeley	1,684	Peter Hicks	Board
43	Unit F, Riverside Industrial Estate, Fazeley	Fazeley	8,341	Calders	Board
44	Unit O, Riverside Industrial Estate, Fazeley	Fazeley	9,621	Calders	Board
Subtotal			21,296		
Ref No	Address	Location	Size Sq ft	Owner/Agent	Source
45	Storage Rooms, Fradley Business Centre, Fradley Park	Fradley	8,460	Kingston	Board
46	Unit 4, Fradley Park, Fradley, Lichfield	Fradley	29,250	GVA	Board
47	Fradley Park, Fradley, Lichfield	Fradley	52,500	GVA	Board
48	Unit 5, Dove Close, Fradley Park, Fradley	Fradley	55,121	Kingston	Board
49	Unit 7, Blenheim Way, Fradley Park	Fradley	104,014	GVA	Board
Subtotal			249,345		
Ref No	Address	Location	Size Sq ft	Owner/Agent	Source
50	Unit 2 Greenhough Road, Lichfield	Lichfield	870		Focus
51	Unit 37, Britannia Way, Britannia Enterprise Park	Lichfield	1,636	Kingston	Board
52	Unit 17, Britannia Way, Enterprise Park, Lichfield	Lichfield	2,870	Kingston	Board
53	Unit 3, Ringway Industrial Estate, Eastern Avenue	Lichfield	5,011	Kingston	Website
54	Unit 1A, Ringway Industrial Estate	Lichfield	14,572	Kingston	Board
55	Interchange Park, Trent Valley Road, Lichfield	Lichfield	43,500	Kingston	Board
56	3 Trent Valley Road, Lichfield (former GKN Building)	Lichfield	72,000		Focus
Subtotal			140,459		
Ref No	Address	Location	Size Sq ft	Owner/Agent	Source
57	Units 7, Riverside Industrial Estate, Power Station, Rugeley	Rugeley	2,050	Andrew Dixon & Co	Website
58	Unit 8, Riverside Industrial Estate, Power Station, Rugeley	Rugeley	2,050	Andrew Dixon & Co	Website
59	Unit 9, Kimberley Business Park, The Levels, Brereton Business Park	Rugeley	2,130	Pritchard Group	Website
60	Unit 11, Riverside Industrial Estate, Power Station, Rugeley	Rugeley	4,100	Andrew Dixon & Co	Website
61	Unit 12, Riverside Industrial Estate, Power Station, Rugeley	Rugeley	4,100	Andrew Dixon & Co	Website
62	1 Canal View Business Park, Rugeley	Rugeley	5,460	Andrew Dixon & Co	Website
63	Unit 3, Key Point, Towers Business Park	Rugeley	8,320	Andrew Dixon & Co	Board
64	Unit 4, Key Point, Towers Business Park	Rugeley	8,320	Andrew Dixon & Co	Board
Subtotal			36,530		
Ref No	Address	Location	Size Sq ft	Owner/Agent	Source
65	Storage space, Shenstone, Lichfield	Shenstone	10,000	Midshires	Website
Subtotal			10,000		
TOTAL			852,577		

APPENDIX 10

ANALYSIS OF THE EMPLOYMENT LAND BULLETINS, FROM 2003 TO 2008, BY SIZE

Size (sqft)	Feb-03		Jun-03		Aug-03		Nov-03		Feb-04	
	Total Space Available (sqft)	Number of Units	Total Space Available (sqft)	Number of Units	Total Space Available (sqft)	Number of Units	Total Space Available (sqft)	Number of Units	Total Space Available (sqft)	Number of Units
0 - 2,000	15,782	19	15,536	21	18,649	20	33,244	26	28,756	25
2 - 5,000	49,664	15	36,081	12	23,404	9	29,617	11	31,312	9
5 - 10,000	34,419	5	41,996	6	55,954	8	81,401	13	75,852	10
10 - 25,000	54,191	3	93,202	5	34,191	2	20,000	1	0	0
25 - 50,000	0	0	0	0	0	0	28,000	1	28,000	1
50,000 +	268,581	3	215,810	3	154,730	2	343,531	4	435,163	5
TOTAL	422,637	45	402,625	47	286,928	41	535,793	56	599,083	50

Size (sqft)	Jul-04		Sep-04		Dec-04		Feb-05		Apr-05	
	Total Space Available (sqft)	Number of Units	Total Space Available (sqft)	Number of Units	Total Space Available (sqft)	Number of Units	Total Space Available (sqft)	Number of Units	Total Space Available (sqft)	Number of Units
0 - 2,000	11,931	12	10,166	10	9,449	9	10,849	11	27,632	23
2 - 5,000	39,251	12	36,769	11	49,836	15	38,315	12	33,576	11
5 - 10,000	88,068	13	84,727	13	85,082	12	83,155	12	81,608	11
10 - 25,000	80,385	5	119,812	7	107,813	6	101,377	6	118,817	7
25 - 50,000	54,155	2	0	0	0	0	40,000	1	59,038	2
50,000 +	294,229	3	61,080	1	113,674	2	240,372	3	108,688	2
TOTAL	568,019	47	312,554	42	365,854	44	514,068	45	429,359	53

Size (sqft)	Sep-05		Feb-06		Jul-06		Dec-06		Mar-07	
	Total Space Available (sqft)	Number of Units	Total Space Available (sqft)	Number of Units	Total Space Available (sqft)	Number of Units	Total Space Available (sqft)	Number of Units	Total Space Available (sqft)	Number of Units
0 - 2,000	8,807	6	7,408	6	9,446	7	13,127	8	9,757	6
2 - 5,000	54,713	11	30,862	11	27,352	10	32,633	11	38,592	12
5 - 10,000	66,306	9	34,182	5	18,938	3	40,255	6	61,973	9
10 - 25,000	134,859	10	103,528	7	59,293	4	66,395	5	116,437	6
25 - 50,000	52,333	2	0	0	104,598	3	84,598	3	104,598	3
50,000 +	161,188	3	213,215	4	313,215	5	306,266	4	267,256	4
TOTAL	478,206	41	389,195	33	532,842	32	543,274	37	598,613	40

Size (sqft)	Aug-07		Nov-07		Mar-08		Jul-08		Sep-08	
	Total Space Available (sqft)	Number of Units	Total Space Available (sqft)	Number of Units	Total Space Available (sqft)	Number of Units	Total Space Available (sqft)	Number of Units	Total Space Available (sqft)	Number of Units
0 - 2,000	6,396	4	8,914	6	10,574	7	26,411	17		
2 - 5,000	45,578	14	38,741	12	42,536	13	25,877	8		
5 - 10,000	49,809	8	60,388	9	82,472	11	48,508	7		
10 - 25,000	95,764	5	95,764	5	100,631	5	108,739	6		
25 - 50,000	105,219	3	183,297	5	183,297	5	208,840	6		
50,000 +	211,635	3	325,274	4	342,997	4	270,154	3		
TOTAL	514,401	37	712,378	41	762,507	45	688,529	47		

APPENDIX 11

**ANALYSIS OF THE EMPLOYMENT LAND BULLETINS, FROM 2003 TO 2008, BY
LOCATION**

Location	Location	Feb-03		Jun-03		Aug-03		Nov-03		Feb-04	
		Total Space Available (saft)	Number of Units	Total Space Available (saft)	Number of Units	Total Space Available (saft)	Number of Units	Total Space Available (saft)	Number of Units	Total Space Available (saft)	Number of Units
Burntwood	Burntwood	157,741	19	122,341	17	29,261	8	172,864	8	374,646	23
Lichfield	Lichfield	180,500	16	191,344	19	70,739	18	274,391	35	152,007	17
Rugeley	Rugeley	5,103	2	5,350	2	3,000	4	4,500	3	2,250	1
Fazeley	Fazeley	2,050	1	20,198	5	119,198	6	17,613	4	17,613	4
Shenstone	Shenstone	77,243	7	63,392	4	64,730	5	66,425	6	52,567	5
TOTAL	TOTAL	422,637	45	402,625	47	286,928	41	535,793	56	599,083	50

Location	Location	Jul-04		Sep-04		Dec-04		Feb-05		Apr-05	
		Total Space Available (saft)	Number of Units	Total Space Available (saft)	Number of Units	Total Space Available (saft)	Number of Units	Total Space Available (saft)	Number of Units	Total Space Available (saft)	Number of Units
Burntwood	Burntwood	333,180	27	214,737	25	188,749	18	194,205	17	133,299	15
Lichfield	Lichfield	205,105	14	69,201	11	76,888	15	186,864	18	184,637	16
Rugeley	Rugeley	2,250	1	2,250	1	6,892	2	42,250	2	29,245	16
Fazeley	Fazeley	26,346	4	26,366	5	40,731	8	38,155	7	22,444	4
Shenstone	Shenstone	1,138	1	0	0	52,594	1	52,594	1	59,734	2
TOTAL	TOTAL	568,019	47	312,554	42	365,854	44	514,068	45	429,359	53

Location	Location	Sep-05		Feb-06		Jul-06		Dec-06		Mar-07	
		Total Space Available (saft)	Number of Units	Total Space Available (saft)	Number of Units	Total Space Available (saft)	Number of Units	Total Space Available (saft)	Number of Units	Total Space Available (saft)	Number of Units
Burntwood	Burntwood	150,699	12	75,970	6	79,815	7	117,087	9	143,420	11
Lichfield	Lichfield	229,679	15	206,169	17	367,254	18	332,111	17	408,231	18
Rugeley	Rugeley	19,034	9	16,766	4	3,530	2	17,912	6	17,112	5
Fazeley	Fazeley	26,200	4	27,696	4	19,649	3	2,570	1	2,570	1
Shenstone	Shenstone	52,594	1	62,594	2	62,594	2	73,594	4	27,280	5
TOTAL	TOTAL	478,206	41	389,195	33	532,842	32	543,274	37	598,613	40

Location	Location	Aug-07		Nov-07		Mar-08		Jul-08		Sep-08	
		Total Space Available (saft)	Number of Units	Total Space Available (saft)	Number of Units	Total Space Available (saft)	Number of Units	Total Space Available (saft)	Number of Units	Total Space Available (saft)	Number of Units
Burntwood	Burntwood	135,517	13	301,191	18	405,997	23	389,058	27		
Lichfield	Lichfield	327,478	15	366,320	15	317,120	14	252,513	8		
Rugeley	Rugeley	19,732	5	9,810	3	9,010	3	18,640	9		
Fazeley	Fazeley	16,634	1	16,634	1	26,255	3	18,318	2		
Shenstone	Shenstone	15,040	3	18,423	4	4,125	2	10,000	1		
TOTAL	TOTAL	514,401	37	712,378	41	762,507	45	688,529	47		

APPENDIX 12

NOTE OF STRUCTURED INTERVIEW WITH ANDREW BUCKMAN, KINGSTON CPC

LICHFIELD DISTRICT COUNCIL

Future General Employment and Office Development in Lichfield District

Structured Interview of Andrew Buckman, Kingstons, 2.00pm Tuesday 2 September 2008

A) General Employment, Existing Estates and Land Allocations

Q1. Do you consider there is currently either a shortage or over provision of vacant industrial premises within the District's existing industrial estates?

There is no real shortage of shed space. There is a broad balance, with a healthy level of churn.

There has been some latent or unsatisfied demand from companies located within Lichfield City. These companies have had to sometimes go elsewhere to satisfy their requirement, as there has been an insufficient variety of product, particularly new floorspace. Some of these companies have relocated within the District (Burntwood), but others have had to move out of the District all together.

Q2. Are there any particular mis-matches between demand and supply in the existing stock of industrial premises (ie size, location, quality, etc)?

Yes, there are.

In Lichfield City, there is a shortage of new speculative development over 5,000 ft². Britannia Way was the last major speculative development of industrial floorspace and this was completed in the late 1980s. There is a big gap in the market for 5,000 to 25,000 ft² units of new floorspace.

At Fradley Park, there is planning permission to build 190,000 ft² of industrial floorspace in a number of units. The developers for this scheme are sitting on this site. However, this scheme should go well once constructed.

Burntwood is well enough supplied in terms of premises. Here, there is a mix of units to suit most occupiers. Occupiers in Burntwood tend to lean towards Cannock, rather than Lichfield.

There is no real over provision of any particular type of premises within the District.

Q3. Do you consider there is a shortage or over provision of existing employment land in the District?

There is no particular shortage or over provision throughout the District. Instead, it is broadly in balance.

Q4. Are there any existing employment areas within the District that could be released for alternative use without affecting or distorting the market?

The southern area of Eastern Avenue, Lichfield City could be released for alternative development. Generally the accommodation in this location is of poor quality. In addition, this area has been diluted by a number of retail based planning permissions. These include the planning permission for Vulcan Road for DIY goods and the planning permission for Lidl for a food store. In addition, Revelan have an interest in the ROM site and are seeking a planning permission for bulky goods retail. Industrial development at this location could not be discounted. However, there are levels issues and the area is close to housing.

Shires Industrial Estate, in Lichfield City, provides a poor level of accommodation. It has passed its economic life.

A similar development (and also owned by Pall Mall Investments) is Interchange Park. This is the former GKN site at Crossfield Road. It comprises 150,000 ft² of very poor accommodation. This would be a very good site for Grade A offices and possibly for some trade uses, car sales and a hotel.

The Ideal Standard Works at Armitage has potential for mixed use if it ever comes forward for development.

Mount Road, Burntwood also contains some very poor accommodation, that is incompatible with the surrounding houses and has very poor road access. A lot of companies on this estate are represented elsewhere in the District.

Q5. *Do you consider the current portfolio of industrial and distribution development sites, as identified by the District Council, is sufficient to meet the likely projected demand?*

Yes. There is a reasonable balance of sites.

There is quite a bit of land left at Fradley Park – 200 acres net developable, including the land controlled by ProLogis. Take up of development has been dictated by the developer, Evans of Leeds. Generally, they have taken a cautious and conservative approach and take up could have gone quicker, given prevailing market conditions. Looking forward, deals are likely to be smaller and at a slower rate. Therefore, the likelihood of a another Tesco size shed has diminished. Instead, there is likely to be a greater market in smaller high bay warehouses, at around 100,000 ft².

200 acres net developable over the next 20 years would require a development rate of 10 acres net per annum. This is not an unreasonable level of take up, given the warehousing market, and is probably still realistic.

Further development at Fradley does raise the issue of job generation. Successful development out of this scheme could depend on a balance of housing development within the District.

Q6. *Are there any particular allocated or permitted development sites that you consider are not required or cannot be developed?*

No.

The Stoford site (Boley Park extension) can be delivered. This land now has planning permission, with access resolved. Once built out, this should go well.

The extension to Britannia Way should have been developed now, as it is a marketable site. However, the current landowner will not sell.

The first phase of Fradley Park, that commenced in 1987, started poorly, with an office based development. However, in due course, this land will be developed for employment purposes.

There is a question mark over the phasing of development land at Fradley Park. This is due to the planning permission issued for the benefit of Evans of Leeds and certain triggers relating to highway improvements to the access to the A38. However, this position is resolvable.

Q7. *Is there a need for additional development land and, if so, where and to cater for what type?*

No.

PJL
King Sturge
9.9.08

APPENDIX 13

RELS RETURN ON LAND AVAILABILITY AS AT 31 MARCH 2008

Litchfield Annual Industrial Land Available at 31st march 2008

Site Name	Completion 2007-2008	Under Construction	Land Availability Status		Planning Status			Total Land Available at 31/3/08	
			readily available	Available in 5 years	Available beyond 5 years	Land with Full Permission	Land with Outline Permission		Land Allocated with no permission
GIS Map 1 Burton Old Road, Streetway	-	-	5.5	6.9	-	-	5.5	6.9	12.4
GIS Map 2 Burntwood Business Park Zone 5	-	-	-	-	11.2	-	-	-	11.2
GIS Map 3 Burntwood Business Park Zone 1 0700356/FUL, Cabbett Road Land off Allwood Road Land off Plant Lane	0.31	-	-	-	-	-	0.21	0.21	0.21
	-	-	0.97	-	-	-	0.97	0.97	0.97
	-	-	0.17	-	-	-	0.17	0.17	0.17
GIS Map 4 Fradley Phase 1 Plot F12 Plot H101 Plot H Land adjoining Castings Corner Wellington Crescent Adjacent Adenico Plot H1B/1	-	-	0.45	-	-	0.45	-	-	0.45
	-	-	0.31	-	-	0.31	-	-	0.31
	-	-	1.46	-	-	1.46	-	-	1.46
	-	-	0.29	-	-	0.29	-	-	0.29
	-	-	0.59	-	-	0.59	-	-	0.59
	-	-	0.23	-	-	0.23	-	-	0.23
	-	-	0.39	-	-	0.39	-	-	0.39
GIS Map 5 Fradley Phase 2 Tesco distribution Plot D104 Phase 4	24.1	-	-	-	-	-	-	-	0
	-	-	7.3	-	-	7.3	-	-	7.3
	-	-	42	-	-	42	-	-	42
	-	-	-	-	-	-	42	-	49.3
GIS Map 6 Fradley Phase 3 Land South Wood End Lane	-	-	-	-	18.6	-	-	-	18.6
GIS Map 7 North Britannia Way Land north of Britannia Way	-	-	-	-	-	-	-	2.5	2.5
Total	24.41	0	59.84	6.9	37.7	0	98.87	98.87	98.87

previously 2 separate applications

permission for office development covered by existing outline for B1/B2/B8 warehouse extension with permission covered by existing outline for B1/B2/B8 covered by existing outline for B1/B2/B8 permission for office development

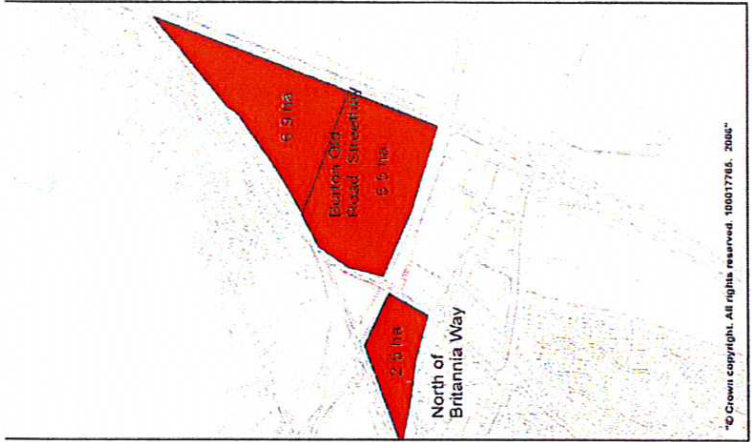
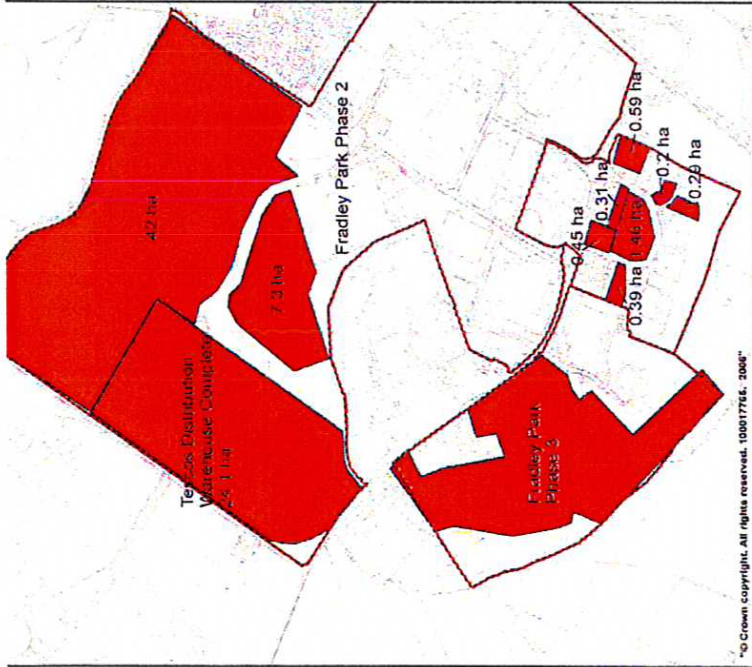
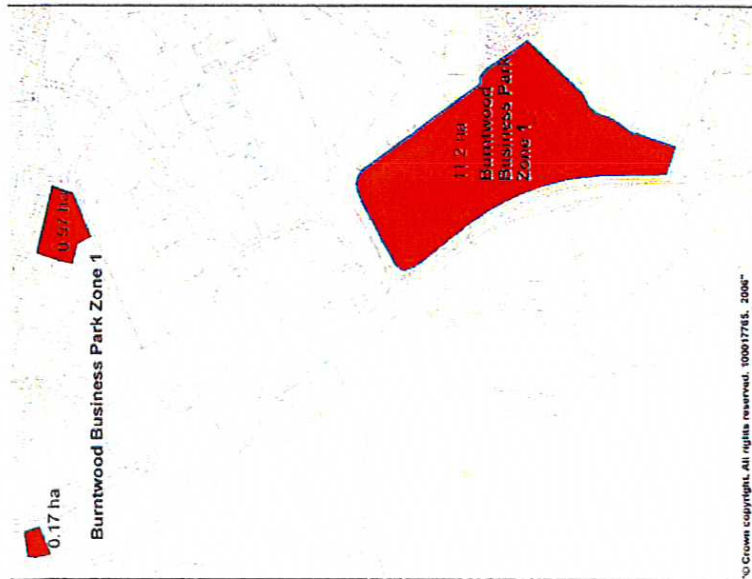
*down as under construction in 2007/7

At 31st March 2008 no sites were under construction on the above sites. Tesco's distribution centre at Fradley Phase 2 and 4 offices at Burntwood Business Park Zone 1 have been completed during 2007-2008. No new permissions have been granted on the above sites during this period.
At 2008 there remains 98.87 ha of employment land with either planning permission or plan allocation.

- GIS Map 1 Burton Old Road, Streetway Map
- GIS Map 2 Burntwood Business Park Zone 5
- GIS Map 3 Burntwood Business Park Zone 1
- GIS Map 4 Fradley Phase 1 Map Link
- GIS Map 5 Fradley Phase 2 Map Link
- GIS Map 6 Fradley Park Phase 3 Map Link
- GIS Map 7 North Britannia Way Map Link
- Burton_Old_road.jpg
- Burntwood Business Park Zone 5.jpg
- Burntwood Business Park Zone 1.jpg
- Fradley Phase 1 Map Link
- Fradley Phase 2 Map Link
- Fradley Park Phase 3.jpg
- Britannia Way.jpg

Offices now complete 0.21 ha
0.31 ha





2007-2008 West Midlands Employment Land Survey - 2008

All land remaining available is shown on this map at three locations - Burntwood, Fradley and Lichfield City North. In relation to Burntwood Business Park Zone 1 note that on Form 1 as submitted last year there were only 3 sites recorded. Could you confirm that the site to the east needs to be added as it appears as if it has been missed off? With the exception of the site which measures 0.31 ha now built, the rest remain available.

In relation to Fradley Phase 1 following a site visit I have identified all remaining undeveloped parcels of land. In note that on Form 1 that there are only 3 sites recorded - I believe that the site should be split into the 7 remaining sites - any views?

At Fradley Phase 2 Tesco is now built and the remainder of this phase is now made up of 2 sites.

At Streethay there has been no change - although a planning appeal has been lodged in relation to the recent planning refusal.

Before I start to update the RELS Forms do you want me to create new sites for example for Fradley South?

APPENDIX 14

PLAN OF REVELAN SCHEME AT EASTERN AVENUE, LICHFIELD

LOCATIONS

UK

England • Scotland • Wales

King Sturge LLP

Part of the King Sturge International Group:

THROUGHOUT EUROPE

including:

Austria • Belgium • Croatia • Czech Republic • France • Germany

Greece • Hungary • Ireland • Italy • Luxembourg • Netherlands • Poland

Romania • Russia • Serbia • Slovakia • Spain • Switzerland

THE AMERICAS

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