Economic and Employment Needs Assessment

Huntingdonshire District Council

June 2025

Volterra

Huntingdonshire District Council

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1. Executive Summary

Introduction

1.1 Volterra Partners LLP ('Volterra') was commissioned by Huntingdonshire District Council (HDC) to prepare an Economic and Employment Needs Assessment (EENA) to inform the update of the Local Plan to 2046. This assessment responds to the requirement for local authorities to understand existing and future business needs and ensure adequate employment land is identified and safeguarded.

1.2 The assessment aligns with national Planning Practice Guidance (PPG) and incorporates multiple strands of evidence: policy and economic context, labour market and socio-economic analysis, property market conditions, site assessments, infrastructure impacts, and demand modelling. Extensive stakeholder engagement was conducted with local businesses and property agents to ensure that local intelligence informed key assumptions and findings.

1.3 The EENA provides a forward-looking evidence base considering a broad set of scenarios and sensitivity tests to identify the quantum and type of employment space required to meet Huntingdonshire's economic needs.

1.4 The report is organised into the following main sections and appendices:

- **Section 3 Policy and guidance**: sets out the policy and guidance context that is the background for the study;
- **Section 4 National context**: discusses how issues such as permitted development rights, the introduction of Use Class E, minimum energy efficiency standards, and the changing nature of work including automation could affect the findings of the assessment;
- **Section 5 Local context**: considers how local issues such as the future of Alconbury Enterprise Zone, strategic opportunities around logistics, rural diversification, the knowledge economy and life sciences, devolution and local government reorganisation could affect the findings of the assessment;
- **Section 6 Functional Economic Market Area**: summarises the process undertaken to identify Huntingdonshire's functional economic market area;
- **Section 7 Socio-economic profile**: presents the key trends and characteristics of the labour market and local economy;
- **Section 8 Property market assessment**: provides an overview of the commercial property market for the scoped in commercial uses;
- **Section 9 Requirements of key sectors**: gives an overview of the appropriate locational and space needs to support key employment sectors, aligned with national priorities and local specialisms;
- **Section 10 Supply assessment**: presents the findings of the desk-based and in-person site appraisals, and the domain-based RAG rating of the supply of existing and potential future employment sites;
- **Section 11 Impact of infrastructure**: the strengths, weaknesses, opportunities and threats presented by existing, new and planned infrastructure upgrades for facilitating future employment growth are described;
- **Section 12 Needs assessment**: the approach to, and results of, the modelling of future need for employment floorspace and land across six scenarios is set out;
- **Section 13 Identifying the supply/demand balance**: adjustments to the need scenarios are made in this section to account for existing vacancy, frictional vacancy, and replacement of losses to reach the net supply/demand position;
- **Section 14 Sensitivity testing**: to account for uncertainties, sensitivity tests are applied to illustrate the impact of different assumptions on the modelling and what specific trends would mean for overall need if they materialise over the study period;

- **Section 15 Preferred scenario**: discusses on balance of the needs assessment, supply/demand balance, and sensitivity testing, what a preferred scenario could be; and
- **Section 16 Conclusions and recommendations**: presents a qualitative discussion synthesising the information of the previous chapters.

1.5 The main report is supported with five supplementary appendices which are either included or appended to this document:

- **Appendix A**: shows a series of maps detailing the location of each of the sites that form the supply of employment sites in Huntingdonshire;
- **Appendix B**: sets out the methodological approach to the assessment of the existing and potential future supply of employment sites;
- **Appendix C**: provides a portfolio of information for each of the Established Employment Areas including a building level map;
- **Appendix D**: discusses the concept of suppressed demand as an approach to establishing future need for industrial and logistics land; and
- **Appendix E**: shows the supply/demand balance calculations for each of the tested future scenarios.

Summary of the preferred scenario

1.6 The preferred scenario represents a balanced and evidence-led approach to planning for future employment land needs in Huntingdonshire between 2025 and 2046. It draws from a synthesis of labour demand and supply projections, adjusted for local market insight, spatial objectives, and strategic policy considerations.

1.7 Rather than relying on any single modelling approach, the preferred scenario combines elements of the aspirational labour demand scenario and the future residence-based labour supply scenario. This hybrid approach reflects both Huntingdonshire District Council's economic ambitions and the scale of housing-led population growth anticipated in the district. It also takes into consideration and aligns with the scale of strategic scale demand which multiple agents and landowners have identified (during discussions and interviews as part of the assessment) for storage and distribution uses.

1.8 The modelling results in a gross need figure to which a series of adjustments are made. These include accounting for existing vacancy, an ideal future amount of vacancy, and replacement of lost floorspace over time. The preferred scenario results in the net additional floorspace and land targets presented in the table below. The scenario results do not include pipeline development i.e. unimplemented planning commitments.

Employment use	Floorspace target (m^2)	Land target (ha)
Office	113,000	16.8
Research and Development	45,900	5.6
Light industrial	106,000	22.1
General industrial	224,000	74.6
Storage and distribution	433,000	110.9
Total	**922,000**	**230**

1.9 Both floorspace and land targets are presented. Plot ratios which reflect the current use classes in the area have been used to convert between the two. It is however noted that some sites being put forward have considerably different ratios between the two metrics due to specifics such as setting aside land for

landscape/flood mitigation etc. When considering land allocations, the floorspace figure should be viewed as the more important.

Conclusions and recommendations

1.10 The EENA sets out a comprehensive picture of Huntingdonshire's economic context, highlighting both challenges and growth opportunities. The district benefits from strong employment rates, a healthy SME base, and strategic positioning between Cambridge and Peterborough. However, it also faces constraints including an ageing workforce, skills gaps, limited supply of modern commercial floorspace, and growing pressures from functional obsolescence due to energy performance regulations.

1.11 A preferred moderate-high growth scenario is recommended, underpinned by realistic labour supply growth and strong prospects for storage and distribution. This scenario equates to a net requirement of around 230 ha of additional employment land (922,000m^2 of floorspace) by 2046 across office, R&D, industrial, and storage and distribution uses. A hybrid scenario combining realistic labour supply forecasts (Scenario 2b) and aspirational demand for logistics (Scenario 1b) is considered most appropriate, balancing ambition with deliverability.

Recommendations

- **Ensure a flexible supply of employment land** – consider allocating new employment sites (or expand existing ones).
- **Upgrade, intensify and 'green' the existing employment stock** – churn of outdated stock should be facilitated.
- **Support key cluster and innovation-led growth** – planning decision making should be favourable to proposals that include co-location of businesses in key sectors.
- **Plan for strategic logistics growth** – allocate at least one additional strategic scale logistics site.
- **Regular monitoring and adaptive review of economic needs** – monitor outcomes and periodically review the evidence base.
- **Boost the rural economy through diversification and access** – continue to allow the conversion of redundant agricultural buildings into small workshops, offices, and tourist facilities.

2. Introduction

Purpose of assessment

2.1 Volterra Partners LLP ('Volterra') was commissioned by Huntingdonshire District Council ('HDC') to produce an Economic and Employment Needs Assessment ('EENA') for Huntingdonshire. The EENA provides an important evidence base document to inform the Local Plan Update, in compliance with the requirement of local authorities to understand existing and future business needs.[1] The assessment considers how the amount and types of employment in the district might change over the Local Plan Update period to 2046. The report makes recommendations about the approach to safeguarding an appropriate amount of employment land to accommodate changes in employment during this time.

Approach

2.2 The approach taken to assessing economic and employment needs aligns with national planning practice guidance (PPG), namely: 'Housing and economic needs assessments'[2], 'Plan-making'[3] and 'Making effective use of land'.[4] This guidance requires that local authorities understand the latest evidence relating to business needs. To achieve this, the tasks underpinning the EENA were organised into three key stages, as shown in **Figure 2.1**. The methodologies used for each of the specific tasks are set out in full detail in the respective sections of the report.

2.3 Broadly, the tasks within Part 1 set the scene for the later assessment through a review of the existing and emerging policy context at the local, regional and national scale. This is supplemented with discussion on relevant issues to the assessment comprising prevailing trends and conditions in the commercial property and labour markets. The economic needs of Huntingdonshire do not exist in isolation; a functional economic market area is identified to assist with understanding how the future economy of the district is related in part to the characteristics of wider area in which it is located.

2.4 The scope of the EENA can be distilled into the relationship between its core components of people, property and place. Within Part 2, detail is provided on the baseline conditions within the study area(s). This comprises an assessment of key socio-economic indicators in order to understand the labour market and local economy characteristics. An assessment of the property market is also provided to establish the preconditions for future growth/change in employment-generating floorspace and land within the district. A thorough assessment of the supply of sites that accommodate, or could accommodate, these uses in future is presented. The supply assessment has been conducted using a combination of desk-based and in-person appraisals. The capacity of infrastructure could determine, unlock, or limit how the district develops over the Plan period; a strengths, opportunities, weaknesses and threats (SWOT) analysis is presented to capture these potential futures.

2.5 Part 3 synthesises the earlier analysis with a quantitative assessment of future employment needs in terms of jobs, floorspace and land requirements to accommodate growth. The assessment considers a total of six scenarios including three core scenarios (labour demand, labour supply, and past take-up) and three adjusted scenarios. Sensitivity testing on these in recognition of the impact of the delivery of housing on the ability for forecast needs to materialise and the influence of critical uncertainties on the overall outcomes.

[1] Ministry of Housing Communities and Local Government, 2024. Housing and economic needs assessments.

[2] Ministry of Housing Communities and Local Government, 2024. Housing and economic needs assessments.

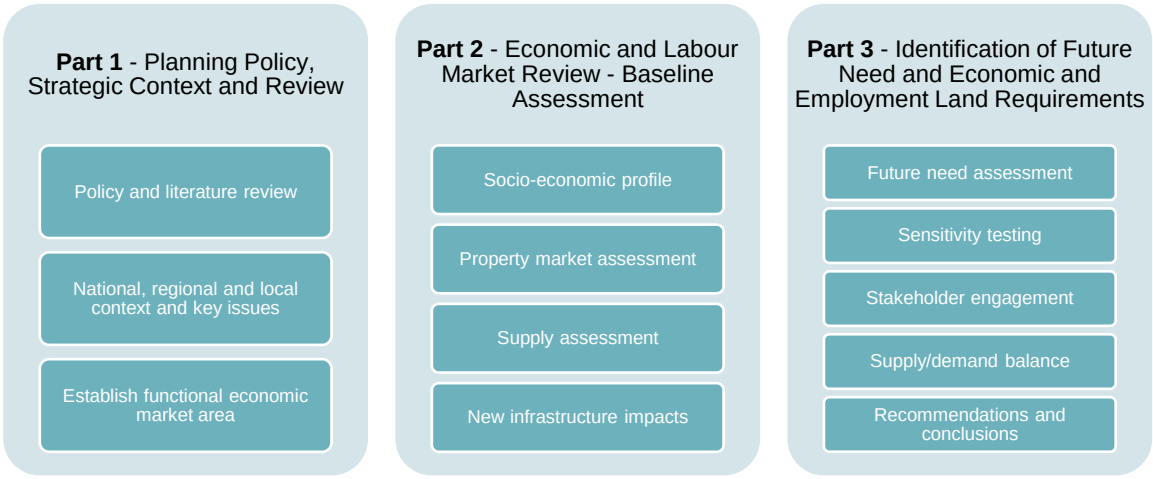
[3] Ministry of Housing Communities and Local Government, 2025. Plan-making.

[4] Ministry of Housing Communities and Local Government, 2025. Making effective use of land.

Volterra has engaged with property agents and local businesses throughout the assessment process to ensure that local views and insights are captured within the EENA. Key findings from this engagement are presented where relevant throughout the report. The forecast needs (demand) are then analysed against the existing supply position to reach a net requirement for employment-generating floorspace/land. The EENA culminates in a range of recommendations to inform the policy approach for safeguarding and promoting business needs over the Plan review period.

2.6 The EENA is concerned with employment-generating floorspace/land in office, research and development, light industrial, general industrial, and storage and distribution use. It is recognised that other use type properties also support employment (such as leisure, entertainment and retail premises) although these are beyond the scope of this assessment.

Figure 2.1 – The EENA approach



Relationship with the Economic Growth Strategy

2.7 Concurrently to the preparation of the EENA, an Economic Growth Strategy (EGS) Update has been prepared by Partnering Regeneration Development Ltd. (PRD). The purpose of the EGS is to establish a vision for the development of the economy over the Plan Update period. The overall direction suggested within the EGS is therefore highly related to the findings of the EENA. Volterra and PRD have collaborated throughout the progression of the respective commissions to facilitate alignment of identified need with identified aspirations. Elements of the respective commissions have been co-authored.

Limitations and assumptions

2.8 Economic forecasting is associated with a degree of uncertainty which increases as the study period over which forecasts are conducted increases. In order to navigate this uncertainty such that the findings of the EENA remain applicable and useful over the Plan period, the inherent limitations and assumptions used are clearly stated where relevant in the discussion within this report. A range of sensitivity tests have been conducted to address these. In summary, the key areas which present a limitation to the study methodologies employed relate to:

- **Economic modelling**: forecasts of employment change over the study period used to inform the identification of need for employment floorspace are derived from modelling. Models are limited by their

ability to consider a finite amount of inputs. Employment change over time could therefore materialise differently to anticipated which could affect the requirement for floorspace/land.

- **The mapping of employment trends to space requirements**: businesses have different requirements for types of space. A mapping exercise from sectors to use classes is conducted to determine the breakdown of demand by floorspace use types. There is not always a fixed relationship between the sectors businesses operate in, and the use class of space that they require. In reality, businesses operating within broader sectors may have more nuanced requirements depending on their size and operational functions.
- **Employment densities**: the changing nature of work facilitated through hybrid working means that the ready reckoners for the employment density of space (the amount of floorspace needed to support jobs) could no longer reflect prevailing trends if it is assumed that factors such as utilisation rate of workspace have evolved in the context of hybrid and home working.
- **Plot ratios**: the requirement for employment land is derived using plot ratios (the ratio of building floorspace to total site area) which can vary depending on the degree to which land is constrained. Industry proxies are sense checked against local sample analysis to improve confidence in their applicability.
- **The accuracy of data**: all data is subject to inaccuracies based on surveying and analysis techniques. Office for National Statistics (ONS) data can be highly volatile and analysis built on this may be hampered in part by the reliance on Standard Industrial Classifications (SIC) which are criticised for their potential inability to capture the characteristics of the modern economy.[5] Data collected during the coronavirus pandemic may be considered to reflect extraordinary circumstances rather than the economy in the absence of those conditions.

Structure of the report

2.9 The remainder of the report is organised around the tasks undertaken in preparing the EENA:

- **Section 3 Policy and guidance**: sets out the policy and guidance context that is the background for the study;
- **Section 0 National context**: discusses how issues such as permitted development rights, the introduction of Use Class E, minimum energy efficiency standards, and the changing nature of work including automation could affect the findings of the assessment;
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[5] Cambridge Ahead, 2025. Growth in the Cambridgeshire and Peterborough economy 2018-24.

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3. Policy and guidance

3.1 This section of the report sets out the policy and guidance context which underpins the assessment, and is organised in a descending spatial scale from national, regional, to finally local geographies.

National

National Planning Policy Framework (2024)

3.2 The National Planning Policy Framework (NPPF) was last updated in December 2024.[6] The NPPF determines the overall approach to planning in England. Central importance is placed on the need to build a strong and competitive economy through creating '*the conditions in which businesses can invest, expand and adapt*'. In so doing, Chapter 6 states that planning policies should:

- *'identify strategic sites for local and inward investment to match the strategy [for sustainable economic growth and] to meet the anticipated needs over the plan period'* (paragraph 86a);
- *'pay particular regard to facilitating development to meet the needs of a modern economy, including by identifying suitable locations for uses such as laboratories, gigafactories, data centres, digital infrastructure, freight and logistics'* (paragraph 86c); and
- *'be flexible enough to accommodate needs not anticipated in the plan, and allow for new and flexible working practices and spaces to enable a rapid response to changes in economic circumstances'* (paragraph 86e).

3.3 The updated text has a renewed focus on economic growth through consideration of the locational requirements of key sectors including data-driven, creative, high technology, and storage and distribution operations (logistics).

Planning Practice Guidance: Housing and economic needs assessment (2024)

3.4 National PPG supports the implementation of the NPPF through the provision of additional detail on the application of policies and the technical approach to executing them. The housing and economic needs assessment PPG is the underpinning guidance for conducting the EENA.[7] The guidance requires that specific tasks are undertaken to ensure the assessment of economic needs is robust. This includes but is not limited to: definition of a functional economic market area, assessment of the existing stock of employment uses, trends in supply and market demand, as well as market signals relating to growth, diversification and innovation, and evidence of market failure (paragraph 026).

3.5 The PPG determines that labour demand, labour supply, and past-take up forecasting techniques should be employed to determine future needs, although also notes that alternative scenarios which take account of longer economic cycles might also be considered (paragraph 027). The specific locational requirements of storage and distribution premises requires related needs to be considered separately to general industrial land (paragraph 031).

[6] Ministry of Housing, Communities and Local Government, 2024. National Planning Policy Framework.

[7] Ministry of Housing, Communities and Local Government, 2025. Housing and economic needs assessment.

Planning Practice Guidance: Plan-making (2025)

3.6 The plan-making PPG is applicable when local authorities review their Local Plans in order to take into account significant economic changes or '*whether any new social, environmental or economic priorities have arisen*'.[8] The guidance emphasises the need to maintain effective co-operation between plan-making authorities, particularly on strategic matters relating to housing and employment need, for example. The definition of a functional economic market area, for which a suggested approach is given, may facilitate discussions between local authorities, along with an understanding of how the potential futures in one location may affect those in another.

3.7 For the purposes of the EENA, paragraph 040 is relevant to gathering evidence relating to businesses and should include assisting with:

- '*preparing and maintaining a robust evidence base to understand both existing business needs and likely changes in the market, with reference to local industrial strategies where relevant'*; and
- '*engaging with the business community to understand their changing needs and identify and address barriers to investment'*;

3.8 As described in paragraph 041, the application of the evidence base being compiled as part of the Local Plan Update will be for HDC to assess:

- '*the need for land or floorspace for economic development, including both the quantitative and qualitative needs for all foreseeable types of economic activity over the plan period, including for retail and leisure development'*;
- '*the existing and future supply of land available for economic development and its suitability to meet identified needs'*; and
- '*the likely availability and achievability of employment-led development, taking into account market signals'*.

Planning Practice Guidance: Effective use of land (2019)

3.9 The approach to safeguarding employment land is intrinsically linked to the overarching aim to make effective use of land, as per the appropriate PPG.[9] Recommendations within the EENA are guided by the consideration of the evidence suggested by the PPG including whether sites are being developed for their intended use, and where alternative proposed uses could address unmet needs.

Invest 2035: the UK's modern industrial strategy (2024)

3.10 In October 2024, the Government published Invest 2035, which outlines a new industrial strategy for the following decade.[10] The document affirms the Government's focus on economic growth, driven by key sectors: advanced manufacturing, creative industries, clean energy, defence, digital and technologies, financial services, life sciences, and professional and business services. This will be underpinned by a

[8] Ministry of Housing Communities and Local Government, 2025. Plan-making.

[9] Ministry of Housing Communities and Local Government, 2025. Effective use of land.

[10] UK Government, 2024. Invest 2035: The UK's Modern Industrial Strategy.

qualitative lens on growth which must support high-quality jobs and '*ensure that benefits are shared across people, places and generations*'.

3.11 The strategy places emphasis on the role of city regions and innovation clusters that will afford businesses locational benefits through agglomeration and specialisation. A place-based approach warrants attention to locally distinct strengths and weaknesses, as well as comparative advantages. Local capabilities could and should align with national missions, whilst building on existing capabilities in terms of skills and infrastructure.

UK Innovation Corridor Growth Plan 2024 – 2030

3.12 The UK Innovation Corridor refers to a swathe of local authority areas between London and Cambridge, which specialise in knowledge driven economic activities including technology and life sciences. The Growth Plan aims to stabilise the favourable inward investment locations of Cambridge and London to broaden the gains for the functionally connected surroundings.[11] The aspirational targets aim to: increase GVA from £189 billion to £350 billion by 2040; generate new "unicorn" firms[12]; create 400,000 new jobs by 2036 of which half would be in the technology, life sciences and knowledge sectors; and maintain higher GVA per hour worked than the UK average.

3.13 For Huntingdonshire, the Growth Plan specifies Alconbury Weald/Alconbury Enterprise Zone as poised to be stimulated by the growth of Cambridge.[13] Applicable barriers to realising the potential of the Innovation Corridor include: attracting inward investment, mapping and understanding how scientific companies interact, and growing the amount of (affordable) housing to accommodate a fast-growing population of highly skilled workers whilst maintaining quality of life.

Regional

Cambridgeshire and Peterborough Economic Growth Strategy (2022)

3.14 The Cambridgeshire & Peterborough Combined Authority (CPCA) published an Economic Growth Strategy in 2022 focusing on good growth across the region. The strategy recognises that the region is a major driver of growth nationally, the economy being 'the most innovative and fastest growing in the UK outside London'.[14]

3.15 The Strategy sets out objectives around accelerating local placemaking and renewals which will be achieved through bringing forward employment land, including in market towns. This includes start-up and grow on space in town centres. To accelerate business growth, actions described in the Strategy are to ensure that all parts of the region have the ecosystem in place to support high growth businesses. The key vision statement for CPCA is that:

[11] UK Innovation Corridor, 2024. Growth Plan 2024 – 2030.

[12] A "unicorn" firm is a start-up company which has been valued at over $1 billion (USD).

[13] Note: Within the Alconbury area there is Alconbury Weald and Alconbury Enterprise Zone. Alconbury Weald refers to the whole residential and commercial masterplan, including 5,000 homes. Alconbury Enterprise Zone refers to the commercial element located within Alconbury Weald.

[14] Cambridgeshire and Peterborough Combined Authority, 2022. Cambridgeshire and Peterborough Economic Growth Strategy.

'Cambridgeshire and Peterborough is the place where unique business, natural and research assets tackle world problems whilst creating good jobs and healthy lives for all our residents in all our places'[15]

3.16 The vision statement encapsulates the aim to be globally significant (through innovation solving global challenges) but locally inclusive. For Huntingdonshire, this regional strategy means aligning plans with good growth principles and ensuring new employment developments also contribute to community well-being and environmental goals.

Cambridgeshire and Peterborough Strategic Spatial Framework (Non-statutory): Towards a Sustainable Growth Strategy to 2050 (2018)

3.17 The Non-Statutory Spatial Framework developed by CPCA in 2018 has three main objectives.[16] These are to: set out how development strategies in various Local Plans would be implemented to achieve jobs targets, indicate the ambition for growth to 2050, and how authorities can collaborate strategically to achieve this growth. The Framework highlights becoming the UK's capital of innovation and productivity, and ensuring access to good jobs near to residences among its immediate ambitions.

3.18 With reference to strategic employment locations, the strategy envisages the role of Alconbury Enterprise Zone as central for enhancing the complementary business clusters in the fast-growing cities of Cambridge and Peterborough. CPCA set out in the Framework their intention to '*use its investment decisions, influence and practical support to help achieve'* the successful delivery of jobs in the Enterprise Zone.

Cambridgeshire and Peterborough Local Industrial Strategy (2019)

3.19 The Local Industrial Strategy[17] (developed with Government as part of the previous Industrial Strategy agenda) builds on the 2018 Cambridgeshire-Peterborough Independent Economic Review (CPIER). It identifies the region's globally competitive sectors and sets out actions to double the area's economic output. It recognises Huntingdonshire's role in the advanced manufacturing and engineering supply chain, especially via the Alconbury Enterprise Zone extending the Cambridge economy's reach, the latter being a 'jewel in the crown' of the UK economy.

3.20 The Strategy's headline objective is to harness the full potential of innovation in the region. It targets making the area a global leader in life sciences, AI (artificial intelligence), advanced manufacturing, and agri-tech/food production. Huntingdonshire should continue to provide for manufacturing and engineering growth

[15] Cambridgeshire and Peterborough Combined Authority, 2022. Cambridgeshire and Peterborough Economic Growth Strategy.

[16] Cambridgeshire and Peterborough Combined Authority, 2018. Cambridgeshire and Peterborough Strategic Spatial Framework (Non Statutory): Towards a Sustainable Growth Strategy to 2050.

[17] HM Government, 2019. Cambridgeshire and Peterborough Local Industrial Strategy.

(Alconbury Enterprise Zone was explicitly estimated for 8,000 jobs in such sectors by 2036), and also explore whether it can capture some life science or digital sector growth by offering attractive sites.

3.21 The Strategy also notes that the region has distinct economies: Greater Cambridge (innovation-driven), Greater Peterborough (growing city with different strengths), and the Fens (rural economy). Huntingdonshire is located directly between Peterborough, Cambridge and the Fens, which means it can benefit from both: proximity to Cambridge's tech cluster, Peterborough's fast-growing population, and local assets (market towns, countryside) that with investment can grow in parallel.

Cambridgeshire and Peterborough Agri-tech Strategic Action Plan (2021)

3.22 The CPCA Agri-Tech Strategic Action Plan was published in October 2021.[18] It outlines strategies and interventions for advancing agri-tech in the CPCA region, with the aim of reinforcing its position as a global leader in such industrial activities. The report identifies key actions to support the sector, including fostering innovation scale-up, incentivising technology adoption by farmers, developing a skilled workforce, and supporting the journey towards net zero in agriculture. The document's purpose is to guide strategic development and inform the CPCA Business Board on interventions to maximise regional agri-tech potential.

3.23 The Action Plan highlights the need for facilities to support the scale-up of agri-tech businesses, including access to growth capital, infrastructure, and demonstration spaces. A "hub-and-spoke" model is recommended to leverage existing assets for scale-up businesses, suggesting investment in flexible growth capital options and technology validation spaces.

3.24 Potential focuses to advance agri-tech in the region could be specialisms in innovation, R&D, and technology adoption across agriculture, horticulture, and primary processing. There is a specific push to link agri-tech to other sectors like health, life sciences, and advanced manufacturing, with an overarching goal of fostering a multi-disciplinary approach to tackle challenges like climate change and increasing productivity.

Cambridgeshire and Peterborough Advanced Manufacturing Strategy (2021)

3.25 The CPCA Advanced Manufacturing Strategy presents a strategic framework for the growth and development of the advanced manufacturing sector within the CPCA region.[19] It outlines the challenges faced by the sector, particularly following the impact of the coronavirus pandemic and Brexit, and provides a series of recommendations to strengthen the sector. The purpose of this strategy is to create a robust ecosystem for advanced manufacturing, enhance business support, improve the skills pipeline, and enable the sector to capitalise on emerging opportunities in technologies such as green energy, Industry 4.0, and net-zero innovation.

3.26 The strategy focuses on improving the alignment between skills and employer demands. A major theme is increasing the supply of skills required for the evolving needs of employers. The strategy does not set explicit targets for employment land but focuses on fostering growth through initiatives like the 'Make It Smart' integrated business support package, which includes leadership training, strategic planning, and

[18] Cambridgeshire and Peterborough Combined Authority, 2021. Agri-tech Strategic Action Plan.

[19] Cambridgeshire and Peterborough Combined Authority, 2021. Advanced Manufacturing Strategy.

access to funding. There is also an emphasis placed on supporting the development of business hubs and increasing collaboration with academic institutions to bolster innovation.

Cambridgeshire and Peterborough Digital Connectivity Strategy 2021 – 2025 (2021)

3.27 This document outlines a strategic framework to improve digital infrastructure and connectivity across the CPCA region.[20] It aims to ensure that the CPCAs digital infrastructure supports sustainable growth and seeks to address issues related to digital inclusion, which will be particularly important in rural areas. The importance of good levels of digital connectivity to take advantage of emerging technologies recognises the now ubiquitous nature of virtual/digital ways of working.

3.28 The plan aims to support businesses by ensuring access to high-speed, reliable digital connectivity, which is crucial for growth, job creation, and recovery. There is a focus on ensuring that businesses, especially those in rural areas, are connected to high-speed broadband, with a target of achieving 85% gigabit-capable broadband coverage by 2025.

The Case for Cambridge (2024)

3.29 In March 2024, alongside the Spring Budget, the Government published The Case for Cambridge.[21] This document provides a prospectus outlining why expanding Cambridge as a city of national interest and how further growth might be facilitated. It recognises that Cambridge's potential as a scientific and economic supercluster is constrained by housing affordability and supply, a shortage of lab space, and transport and mobility constraints driven by congestion. The case is made for 150,000 new homes by 2050 which in turn would increase the number of economically active residents and therefore contributions to the economy (a central estimate of £6.4 billion).

Up to 150,000 new homes around Cambridge by 2050 might be needed to unlock its full potential

3.30 The document highlights that the challenges in delivering commercial floorspace at a quantum that meets strong demand, due in part to very high land values in the city, could drive the multi-national companies seeking it elsewhere. For Huntingdonshire, a key takeaway is that the region's growth is expected to continue, and potentially accelerate, under Government further impetus. Huntingdonshire might not be at the epicentre, but could be impacted by, for example, more people looking to live in its towns. Equally, businesses could locate or spillover into the area seeking affordable and available commercial premises.

Cambridge Growth Company

3.31 To support the delivery of high-quality sustainable growth in Cambridge and its surrounding areas, the Cambridge Growth Company was established in 2024, with the following key objectives:

[20] Cambridgeshire and Peterborough Combined Authority, 2021. Cambridgeshire and Peterborough Digital Connectivity Strategy 2021 – 2025.

[21] HM Government, 2024. The Case for Cambridge.

- '*Enable and accelerate developments which align with the government's ambitions for Cambridge, and unlock development on stalled sites'*;
- *'Develop the evidence base to support development of an infrastructure-first growth plan and a long-term delivery vehicle: working with experts to assess infrastructure requirements, including water and transport, and laying the foundations to establish a long-term delivery vehicle'*; and
- *'Identify solutions to complex constraints and support a cross-government approach to unblock existing development, providing the right incentives for successful development in the long-term'*.[22]

Cambridgeshire and Peterborough State of the Region 2024 (2024)

3.32 The CPCA State of the Region report provides a comprehensive, evidence-based assessment of the region's current economic, social, and environmental landscape.[23] The report integrates insights from 140 datasets and offers an in-depth analysis of various themes, including economic activity, workforce, skills, health, connectivity, and environmental resilience. The purpose is to inform the CPCA's strategic planning, policy development, and decision-making processes, providing a valuable resource for stakeholders across the region.

3.33 The report outlines regional employment trends, employment growth by sector, and challenges related to job quality, low-paid work, and employment disparities across different demographics. There is an emphasised need to address local skills gaps. The report also suggests that greater efforts are needed to address the shortage of commercial spaces in key locations which are crucial in sustaining economic growth.

3.34 The report stresses the importance of continuing to grow the knowledge economy across the region, focusing on its R&D strengths and access to world-class education institutions. Additionally, manufacturing is identified as a key high-growth sector, with a particular focus on advanced manufacturing and health diagnostics playing a key role in the region's economy.

Cambridgeshire and Peterborough Local Skills Improvement Plan (2023)

3.35 The Cambridgeshire & Peterborough Local Skills Improvement Plan (LSIP) is a significant policy aiming to match training provision with employer needs.[24] The LSIP identifies priority sectors requiring skills investment, which dovetail with the industrial strategy sectors. It highlights life sciences (which faces skills shortages relating to technical and commercial management abilities), advanced manufacturing (which faces an ageing skilled population and misalignment of education with business needs), digital and IT (which has ever-evolving technical demands) and agri-tech (which relies on an international workforce and disparity in qualification levels) as key growth sectors with needs to be addressed. CPCA is directing about £2.5 million of Local Skills Improvement Fund money into initiatives related to these sectors.

[22] UK Parliament, 2024. Realising the Full Potential of Greater Cambridge. Statement made on 31 October 2024.

[23] Cambridgeshire and Peterborough Combined Authority, 2021. State of the Region 2024.

[24] Cambridgeshire Chambers of Commerce, 2023. Cambridgeshire and Peterborough Local Skills Improvement Plan.

Local

Huntingdonshire's Local Plan to 2036 (2019)

3.36 The existing Local Plan for Huntingdonshire was adopted in 2019.[25] It sets the overarching planning policy for development in the district focusing on allocations of land for development and policies against which planning applications are determined. It identifies key economic issues to be addressed over the Plan period including the need for improvements to transport infrastructure to support economic growth, more jobs needed in high value industry sectors, and concerns around the decline in the district's proportion of working age population. To support the objective of achieving a diverse and thriving economy, measures are highlighted to diversify the range of businesses, maximise the benefits of Alconbury Enterprise Zone, develop sector specialisms which capitalise on the strategic location, as well as provide better job opportunities and maintain a good supply of land for growth. The development strategy is centred on the provision for approximately 14,400 additional jobs between 2011 and 2036.

3.37 The Local Plan sets out a range of policies towards building a strong, competitive economy:

- **Policy LP18 Established Employment Areas** recognises the role of key locations within the district for supporting employment where business uses would be favoured and non-business uses resisted other than in exceptional circumstances.
- **Policy LP19 Rural Economy** notes the role of sustainable development for maintaining the rural economy through guidelines on new business development in the countryside (to be preferably located within or adjacent to Established Employment Areas and no larger than 600m^2 in size), and the expansion of an existing business (where within existing operational sites or where additional criteria are satisfied).
- **Policy LP2 Strategy for Development** is the overarching spatial policy in this regard and focuses on providing opportunities for employment, and distributing the majority of employment growth in the spatial planning areas (traditional market towns and most sustainable centres).

Huntingdonshire Local Plan Update

3.38 In January 2023, HDC initiated an update to the Local Plan. A suite of documents have since been prepared to support the process. The EENA forms part of the suite of evidence base documents to support the development of the policy direction in the new Local Plan. A Call for Sites process was also conducted which invited developers, landowners, agents and local communities to submit potential sites for development including specifically for commercial uses.

3.39 As part of the Local Plan Update, in April 2023, an Issues Engagement Paper was published which invited views and discussion on the prevailing development issues in the district that the new Local Plan could address.[26] Views were sought on how the local economy could be supported and diversified, how challenges to business and employment growth could be addressed, and the sectors and business needs which should be facilitated. With regard to logistics, views were also sought on how the Local Plan could consider this specific sector noting the opportunities afforded by the district's strategic location.

3.40 In 2024, the subsequent Further Issues and Options Consultation document reflected on the responses to earlier engagement as well as considering in further detail the policy direction for the updated Local Plan.[27]

[25] Huntingdonshire District Council, 2019. Huntingdonshire's Local Plan to 2036.

[26] Huntingdonshire District Council, 2023. Issues Engagement Paper April 2023.

[27] Huntingdonshire District Council, 2024. Further Issues and Options Paper.

The Call for Sites process resulted in a number of large scale sites being put forward. The options suggested relating to the approach to enhancing the local economy are shown in **Table 3.1**.

Table 3.1 – Options for the Local Plan Update relating to enhancing the local economy provides a range of possible futures for Huntingdonshire

Consideration	Options
Strategy ambitions	• Option A: Plan for limited (low) employment growth to support Huntingdonshire's existing businesses. Growth guided exclusively by criteria based policies. • Option B: Plan for sustainable (medium) growth by supplying a sufficient amount of employment land/allocations to allow for some business expansion and investment and to provide a flexible approach to changing market conditions. • Option C: Plan for ambitious (high) growth capitalising on key priority sectors of the wider economy and creating business clusters. • Option D: Consider an alternative strategy ambition.
Location of development	• Option A: Focus employment growth within and adjacent to Established Employment Areas. • Option B: Focus employment growth strategically along major highways such as the A1. • Option C: Focus employment growth next to or within large scale housing sites promoting mixed use development aligning employment growth with housing growth. • Option D: Focus employment growth in sustainable locations such as allocating sites that are accessible by public transport and active travel. • Option E: Focus on employment growth in existing economic centres which are located in market towns and larger settlements. • Option F: Consider an alternative strategy ambition.
Established Employment Areas	• Option A: Remove the designation of EEA that protects and encourages use class B (general industrial, storage and distribution uses) being located within these areas. • Option B: Continue with safeguarding and enhancement of EEA accounting for changes to national policy and regulations. • Option C: Continue with safeguarding and enhancement of EEA but review the type of uses that are acceptable within them and the criteria used to assess their suitability. • Option D: Create additional and/or extended employment areas by reviewing existing employment sites or allocating new employment sites. • Option E: Consider an alternative option.

Source: Huntingdonshire District Council, 2024. Further Issues and Options Paper.

Huntingdonshire Economic Growth Plan 2020 – 2025 (2020)

3.41 The former Huntingdonshire Economic Growth Plan was published in 2020 and covered the period to 2025. This Economic Growth Plan has been updated concurrently to the preparation of the EENA.

3.42 The former Plan sets out the strategy for economic development in the district, with a focus on promoting growth, enhancing infrastructure, and supporting key sectors.

3.43 The former Plan echoes the target to create 14,400 new jobs by 2036 as part of a broader growth objectives outlined in the Local Plan. This includes outlining efforts to attract businesses to the district, with specialisms which align with the targeted growth sectors, to achieve these employment goals. Advanced manufacturing is outlined as a priority sector. The plan emphasises partnerships with organisations such as MAKE UK and Aston University to support manufacturing businesses. The former Plan also highlights key employment locations that will contribute to the district achieving its employment goals, such as Alconbury Enterprise Zone, and Wintringham Park in St Neots.

Huntingdonshire Employment Land Study (2014)

3.44 The former Employment Land Study (ELS) for Huntingdonshire was conducted in 2014.[28] The ELS assesses the then future requirement for employment land based on five forecasting models. At the time of preparation, the ELS considered there to be limited demand for additional land beyond Alconbury Enterprise Zone and the approach to determining modelling scenarios related to the potential success of the delivery of employment floorspace and job creation there.

3.45 The ELS appraised the Established Employment Areas and considered none to be appropriate for entire release, although a boundary review was recommended on five sites. Of the 21 potential employment allocations appraised, recommendations on the likelihood of meeting qualitative or quantitative employment need were also provided.

3.46 The ELS concluded with additional recommendations which were to: focus on high quality industrial units, proactively promote larger sites, target specific sectors and monitor the portfolio regularly. The gross requirement of employment land that was recommended to be targeted was up to 42 to 46 hectares (ha), in addition to the 8,000 jobs at Alconbury Enterprise Zone. Within the forecasts there was variation in the requirement for types of space, broadly reflecting an increase in demand for office and warehouse space, and a reduction in demand for industrial space.

Table 3.2 – Forecast demand for employment land in the 2014 ELS varied by modelling approach

Forecast demand for employment land in the 2014 ELS.

Model	Overview	Employment land need*
Model 1	Historic land take-up.	Demand for 166.2 ha.
Model 2	Policy off – employment based forecast derived from the East of England Forecasting Model (EEFM).	Demand for up to 8.5 ha (assumes no Alconbury Enterprise Zone).
Model 3	Policy on – Alconbury Enterprise Zone, high displacement and weak target sector employment.	Alconbury Enterprise Zone is delivered but displaces demand from elsewhere in the district and as a result demand drops by up to 41 ha across the rest of the district.
Model 4	Policy on – Alconbury Enterprise Zone, low displacement and strong target sector employment.	Alconbury Enterprise Zone is delivered, focused on attracting firms in target sectors which result in low displacement from

[28] Huntingdonshire District Council, 2014. Employment Land Study.

Model	Overview	Employment land need*
		elsewhere in the district, as a result demand drops by up to 7.8 ha across the rest of the district.
Model 5	Policy on – Alconbury Enterprise Zone, zero displacement and full target sector employment.	Alconbury Enterprise Zone is delivered, which attracts target sectors, with no displacement. There is up to 23 ha demand across the rest of the district.

Source: Huntingdonshire District Council, 2014. Employment Land Study.

** includes a buffer of 29.7 ha, equivalent to five years' take-up.*

Neighbourhood

Huntingdon: A Prospectus for Growth (2020)

3.47 This document represents a vision for Huntingdon town centre, the remainder of the town and Alconbury Weald.[29] The document outlines a roadmap for Huntingdon's economic growth and development, focusing on key areas such as transport, residential, commercial development, and cultural transformation.

3.48 The document reinforces the importance of creating high quality jobs. A major part of the plan is the development of key areas like Alconbury Weald and North Huntingdon to support employment. Alconbury Weald, which includes a designated Enterprise Zone is central to attracting businesses, particularly in high-tech sectors such as advanced manufacturing, clean tech and life sciences. However, the document also states the importance of ensuring that residential, commercial, and leisure spaces are integrated into the town centre to support employment growth. Other sectors which are important to Huntingdon include health, public administration and defence.

St Neots Masterplan for Growth (2018)

3.49 The CPCA funded a masterplan project to ensure that all market towns in Cambridgeshire are interconnected in an overall plan that supports the region's future prosperity. The St Neots Masterplan for Growth recognises the town's strategic location in the Oxford-Cambridge corridor.[30] Initiatives and measures identified which could/will guide the development of the town in future are: incubator spaces at Wintringham Park, becoming a smart-enabled town, a joint investment vehicle to take control of commercial space, and transport and housing growth to the east of the town.

3.50 St Neots is identified as having a strong manufacturing sector, which makes a significant contribution to the local and regional economy. There is a correlation between the existing educational levels of the population and those used within local industry. However, businesses point to a deficit in appropriate skills training that is aligned to industry requirements.

[29] Huntingdonshire District Council, 2020. Huntingdon: A Prospectus for Growth.

[30] Cambridgeshire and Peterborough, 2018. St Neots Masterplan for Growth. Strategic Business Case Phase One.

Ramsey: A Prospectus for Growth (2020)

3.51 The Ramsey Prospectus for Growth presents a vision of growth for the town, with a detailed action plan to address both strengths and weaknesses through short, medium, and long-term interventions aimed at improving infrastructure, health, employment opportunities, and connectivity.[31]

3.52 The document aims to double Ramsey's GVA from £104m in 2017 to over £200m by 2040. This target is part of the broader CPCA goal to increase GVA in the region over the next 20 years.

3.53 The Ramsey Gateway is identified as a key opportunity to provide commercial floorspace, including incubator spaces for small businesses. The plan aims to bring in businesses that currently do not have a presence in the town, creating local employment opportunities and ensuring the town does not remain reliant on out-commuting. Improving transport infrastructure and digital infrastructure is identified as key to making the town more attractive to businesses.

St Ives: A Prospectus for Growth (2020)

3.54 The St Ives Prospectus for Growth sets the ambitious target of doubling St Ives' GVA from £399 million in 2017 to over £1 billion by 2040, which would be crucial for the wider economic growth of Huntingdonshire.[32] The plan focuses on attracting innovative businesses and enhancing the towns role within the Cambridge innovation ecosystem.

3.55 The development of an Innovation Quarter in the town centre is identified as a central development priority, with plans for co-working spaces, high-tech businesses, and residential accommodation to attract young professionals. The Wyton Airfield is also highlighted as a potential site for larger employers in the tech sector.

Neighbourhood Plans

3.56 A number of Neighbourhood Plans have been adopted in Huntingdonshire. **Table 3.3** summarises policies relevant to supporting employment in the respective neighbourhood areas, where applicable.

Table 3.3 – Many of the Neighbourhood Plans in Huntingdonshire have policies on employment

Relevant Neighbourhood Plan policies to the EENA

Neighbourhood	Relevant policy to the EENA
Buckden	**Policy Business 1**: Encourages the development of local businesses within the built-up area of Buckden that support the rural economy, such as agricultural diversification, small retail, and light industry.
Bury	N/A
Godmanchester	**Policy GMC21 – Growing new capacity for small scale businesses in the Town:** Supports proposals for small-scale and micro-business employment opportunities, particularly for start up space on flexible terms. The loss of employment premises will be resisted.

[31] Huntingdonshire District Council, 2020. Ramsey: A Prospectus for Growth.

[32] Huntingdonshire District Council, 2020. Ramsey: A Prospectus for Growth.

Neighbourhood	Relevant policy to the EENA
Grafham and Ellington	**Policy GENP 5 – Supporting the Local Economy**: Encourages small business development in appropriate locations, including home-based businesses, and supports diversification in the local economy.
Great Gransden	N/A
Houghton and Wyton	**Policy HWNP15 – Provision for the Needs of New or Expanded Businesses**: Encourages the creation of small-scale local employment opportunities and the retention of existing employment facilities, particularly in sustainable locations, such as within the village core.
Huntingdon	**Policy E1**: Employment opportunities will be supported throughout Huntingdon, particularly on previously developed land. This includes promoting high-quality business investment, especially in office spaces and light industry, to meet local employment needs and reduce reliance on commuting to other areas.
Sawtry	**Policy SNP11 – Business and employment**: Proposals for business expansion or new employment facilities will be supported if within or near the Built-up Area, align with Development Plan policies, offer local employment and training, improve pedestrian/cycle links, provide secure cycle parking, and mitigate traffic impacts, especially at Brookside Industrial Estate.
St Neots	**Policy RD2**: Existing and allocated employment sites will be protected from change of use unless it can be demonstrated that there is no viable prospect for employment use, including proof of reasonable marketing for alternative uses; if unsuitable for employment, preference will be given to retail or leisure uses.
The Stukeleys	**Policy 2 – Opportunity sites for enhancement**: Proposals for mixed-use development at the Three Horseshoes site will be supported if they retain the pub as a community facility, enhance the site's built form and biodiversity, and provide parking for the adjacent recreation field; the former Three Horseshoes Farm site is supported for redevelopment with environmental improvements, landscaping, self-build plots for locals, and additional parking for the Stukeley Country Hotel.
Great Staughton (forthcoming)	**Policy GSNP 19**: Seeks to protect valued local services and facilities by only supporting their loss through development where viability, demand, or suitable replacement criteria are met, in line with Local Plan Policy LP 22.

4. National context

4.1 This section of the report considers how national issues could impact on the assessment of economic and employment needs in Huntingdonshire.

Changing nature of office work

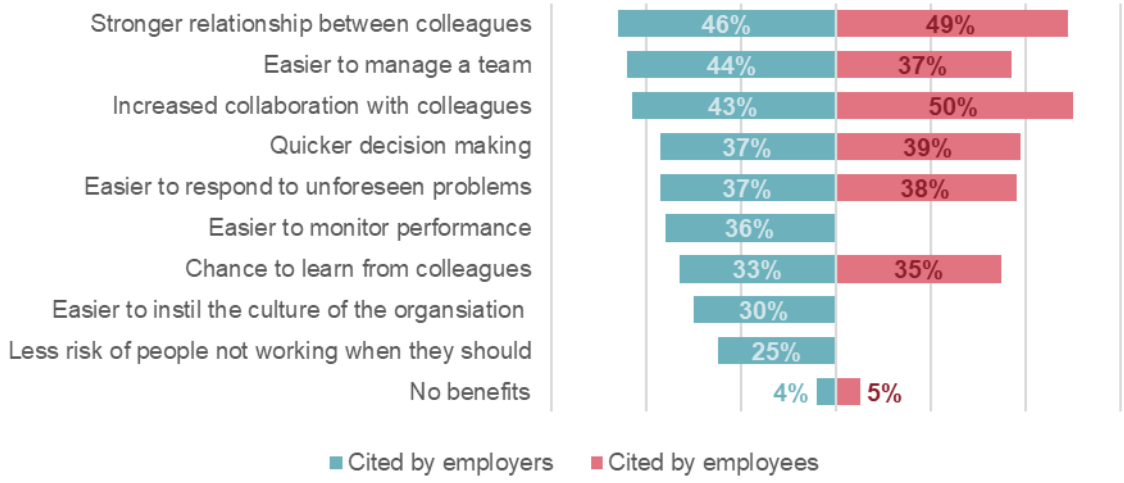
Hybrid and home working

4.2 The restrictions imposed during the coronavirus pandemic forced many people to continue to work but from their place of residence. This catalysed the further adoption of digital and virtual technologies which allowed workers to conduct tasks away from their workplace. As restrictions were lifted, the nature of office attendance in particular remained different, with employers accommodating a gradual return to the office which allowed for some degree of hybrid working, i.e. homeworking for some of the working week. In the autumn of 2024, 40% of working adults in Great Britain recorded typically hybrid or homeworking.[33] A knock on impact of hybrid working patterns is an increased demand for logistics. As employees are now at home more often than they were before the pandemic, they are more likely to order deliveries to their home address as opposed to shopping near to their place of work.

4.3 Despite hybrid working becoming commonplace, employers and employees understand the benefits of in-person working. The main cited benefits of office working underline the importance of relationships, collaboration and learning from colleagues for driving productivity.[34]

Figure 4.1 – Employers and employees cite stronger relationships, easier collaboration, and learning as key benefits of office working compared to homeworking

Benefits of office working cited by employers and employees (%)



[33] Office for National Statistics, 2024. Who are the hybrid workers?

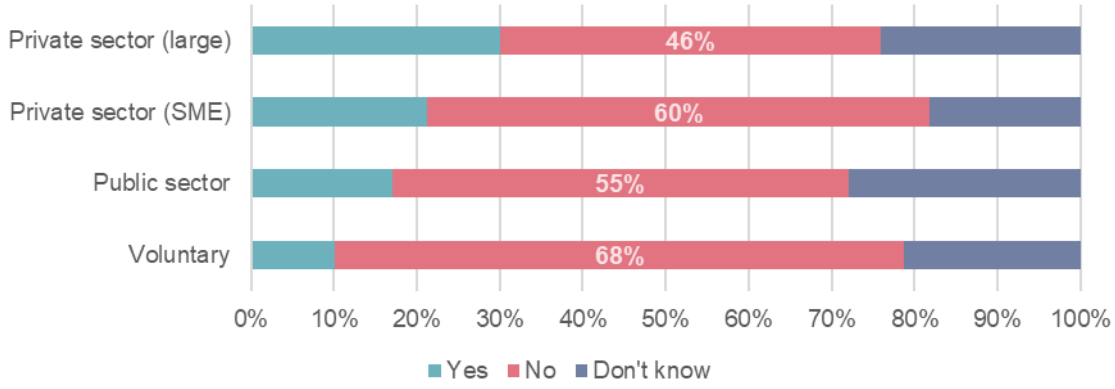
[34] Centre for Cities, 2024. Return to the office: How London compares to other global cities, and why this matters.

Source: Centre for Cities, 2024. Return to the office: How London compares to other global cities, and why this matters. Note this is based on a sample of European cities.

4.4 In recognition of the benefits that in-person attendance has for sustaining organisational culture, inducting new staff and maintaining connections, some employers are moving towards mandated periods of time in the office.[35] According to recent research, in the UK the appetite for increasing the number of days in the office is greatest amongst large private sector employers. Even amongst these, and less so amongst private sector SMEs, public and voluntary sector organisations, the majority of employers are not planning to increase the number of mandated days in the office.[36] Two or three days a week remains the preferred mandated office attendance.

Figure 4.2 – Most UK employers are not planning to increase the mandated number of office attendance days beyond two to three days

Intention to increase mandated office attendance days by employer size and sector (2025)



Source: CIPD, 2025. What are employers' return to the office plans for 2025?

The role of the office in driving return to work

Flight to quality

4.5 On the other hand to push factors which require office attendance, employers are also investing in enhancing the pull factors that draw employees to the office. This has prompted newfound interest in the features and amenities of office spaces. Noting that the ability to collaborate and interact face-to-face are cited as key advantages of office working, employers are considering how reconfiguring workplaces for activity-based layouts can improve the workplace experience.[37] Activity-based floorplates allow for people to have the option to work in different environments throughout the day.[38] The types of space available within buildings are highly associated with the performance of the workplace. Research by Gensler suggests that

[35] UK Parliament, 2022. The impact of remote and hybrid working on workers and organisations.

[36] CIPD, 2025. What are employers' return to the office plans for 2025?

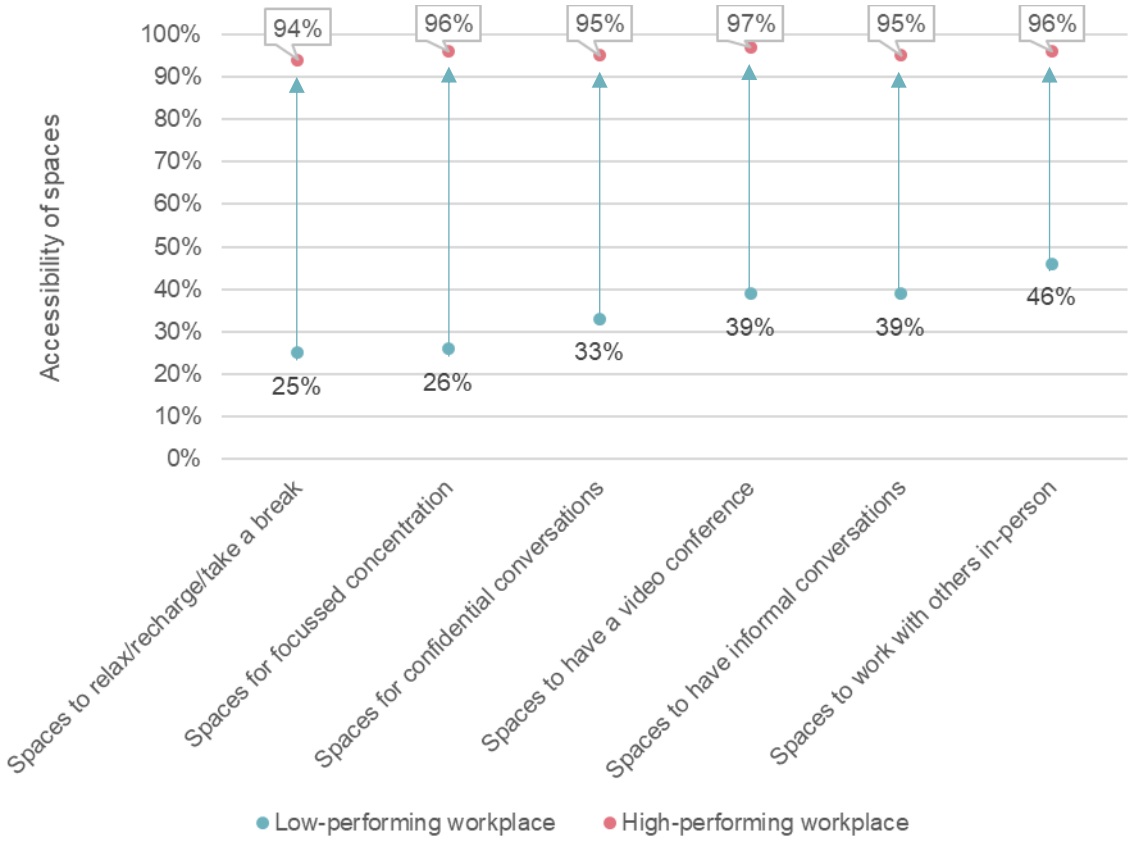
[37] CBRE, 2023. Boosting Office Attendance: Selling and Delivering Workplace Value to Employees.

[38] CBRE, (2025); The Complete Guide to Activity Based Working. Retrieved from: https://www.cbre.com/insights/articles/the-complete-guide-to-activity-based-working#section1 Accessed February 2025.

there is a clear difference between availability of spaces for critical work activities in low- and high-performing workplaces, as shown in **Figure 4.3**.[39]

Figure 4.3 – High-performing workplaces have better access to spaces for critical work activities

Accessibility of spaces in low-performing and high-performing workplaces (% of workplaces)



Source: Gensler, (2024); Global Workplace Survey 2024: Moving beyond employee presence to workplace performance. Note this is based on a sample of 16,000 office workers across 15 countries.

4.6 In what is often referred to as the 'flight to quality', tenant demand for amenity-rich workplaces continues to remain strong. Businesses are seeking out the best designed buildings to maintain the wellbeing and productivity of their staff. Since the pandemic, spaces dedicated to amenities in new and refurbished offices have risen from 5% pre pandemic to 20% in 2023 in the UK.[40]

4.7 Building condition and specification are important for securing occupants' health and wellbeing, which in turn are important determinants of productivity.[41] Designing features which promote health and wellbeing can not only lead to better health outcomes including the alleviation of (techno-) stress, but also drive commercial benefits through inviting recruitment and retaining employees with the attraction of impressive and modern

[39] Gensler, 2024. Global Workplace Survey 2024: Moving beyond employee presence to workplace performance.

[40] K2 Space, 2023. The Future of Work: Office Spaces in Changing Times

[41] British Council of Offices, (2021); Designing and Managing Buildings for Health and Wellbeing.

workplaces. The quality of workspaces will remain an important driver for attracting and retaining talent.[42] **Figure 4.4** highlights the key environmental conditions of buildings which are conducive to occupant wellbeing.

Figure 4.4 – Improved building qualities and environmental conditions can positively affect health, wellbeing and productivity

Recommended building design elements which promote health and wellbeing

A fresh, thermally comfortable environment	Plenty of daylight	No glare	Views out, onto natural settings if possible
An acceptable acoustic climate	Spatial settings that suit COVID-19 conditions as well as various individual or team working needs	Low infection risk but flexible space layouts to allow for active working and human interaction, and breakout spaces, including for contemplation	A 'look and feel' that provides visual interest
Ergonomic workplaces that have been designed to minimise musculoskeletal disorders	A biophilic design that considers the internal space and the exterior surroundings of the building	Minimum pollution from external air and noise	

Source: British Council of Offices, (2021); Designing and Managing Buildings for Health and Wellbeing.

Right-sizing

4.8 To respond to uncertainty around occupancy levels, occupiers of office space have responded by increasingly seeking flexible and adaptable spaces/leases which allow for easier adjustments in the quantum of space leased as demand changes. As the flexible sector recovers from a drop in demand during the coronavirus pandemic, a host of new tenants are seeking space such as: teams moving from fixed to flexible space, bigger businesses, those seeking a more productive environment than home, and new sectors.[43] These spaces often come with modular furniture and divided floor plans, allowing businesses to optimise their usage according to fluctuating demands. According to Savills, 72% of landlords anticipate that tenants will seek more flexible leases in the future and an increasing number of corporate occupiers are only considering buildings that provide flexible office space when relocating.[44]

4.9 The uptake of alternative working models is also reflected in the space requirements of employers. Based on review of the utilisation of leased space in terms of visitation and desk occupancy (and their weekly and

[42] CBRE, 2024. What does the future hold for Central London's Office supply?

[43] Greater London Authority, 2023. The impact of Covid on London's flexible workspaces report.

[44] Savills, 2023. Spotlight: UK Flexible Offices – Summer 2023

seasonal trends), many tenants are considering, especially when leases expire, what their ongoing requirements are. Estate rationalisation, and 'rightsizing' – the term used to describe the process of adjusting the size and configuration of office space to better align with a company's current and future needs – are used to optimise costs on rent. The effect of potentially reduced floorspace requirements paired with spaces becoming available as companies relocate or dispose of leased space, is that new occupiers can potentially be attracted to previously unobtainable locations. Research conducted in 2023 by insurance broking and risk management firm Gallagher[45] found that 63% of UK business leaders are now actively reevaluating their office space needs to accommodate shifting working patterns following the pandemic:

- 21% are planning to move to smaller offices;
- 37% are looking to move to a shared office space; and
- 7% have already made the move and reduced their office space.

Minimum Energy Efficiency Standards

4.10 HDC declared a climate and ecological emergency in Huntingdonshire in 2023, which recognised the impetus to take steps to reduce carbon emissions.[46] The latest national data suggests that around 20% of the UK's emissions are contributed by buildings.[47] Tenants are now considering the sustainability of their buildings as part of their net zero plans and expect landlords to provide evidence of sustainable practices.[48] Research suggests that 53% of tenants said reducing day-to-day operation and energy costs would significantly impact their decisions on new spaces, and 49% indicated that a building's environmental performance and overall sustainability would greatly influence their choice of new commercial space.[49]

4.11 Minimum Energy Efficiency Standards (MEES) are the mechanism through which the UK Government is aiming to drive improvements in the efficiency of non-domestic properties. This is based on the Energy Performance Certificate (EPC) rating system which categorises buildings by their energy performance on a scale from A+ (indicating best-in-class virtually net zero buildings) to G (most inefficient). Since 2023, non-domestic buildings have been required to have an EPC rating of E or better to be lawfully leased. Offices and industrial units fall within the scope of these restrictions. The intention set out in the Net Zero Strategy (2021) was for MEES to be sequentially tightened such that EPC rating to lawfully lease non-domestic properties would be EPC C by 2027, and later EPC B by 2030.[50]

4.12 Energy performance certificates indicate that on the current regulation trajectory, 51% of non-domestic stock in Huntingdonshire will be unlettable by 2028, and nearly 80% will be unlettable by 2030.[51,52] This represents significant proportions of total office, general industrial, and storage and distribution floorspace that will become unlettable by 2030 (see **Figure 4.5**).[53] MEES compliance is variable by floorspace type. A

[45] Gallagher, 2023. Majority of UK businesses now taking steps to reduce office space post-pandemic

[46] Huntingdonshire District Council, 2023. Climate Strategy.

[47] Department for Energy Security and Net Zero, 2025. 2023 UK Greenhouse Gas Emissions, Final Figures.

[48] CIM, 2023. Tenant preferences in the UK office market

[49] CIM, 2023. Tenant preferences in the UK office market

[50] HM Government, 2021. Net Zero Strategy: Build Back Greener.

[51] Ministry of Housing, Communities and Local Government, 2025. Energy Performance of Buildings Data: England and Wales.

[52] Regarding data limitations, the EPC database is large but not complete, not all existing buildings have EPCs, and EPC ratings may be missing for owner-occupied premises or older continuous tenancies. Also, the EPC survey reflects the state of a building at the time the survey was conducted, and some buildings may have since been improved.

[53] The building uses shown in this figure have been organised to align with the scoped-in uses for the EENA, although MHCLG records building uses by different categories, therefore a best fit approach has been taken to attribute EPC information to the EENA uses.

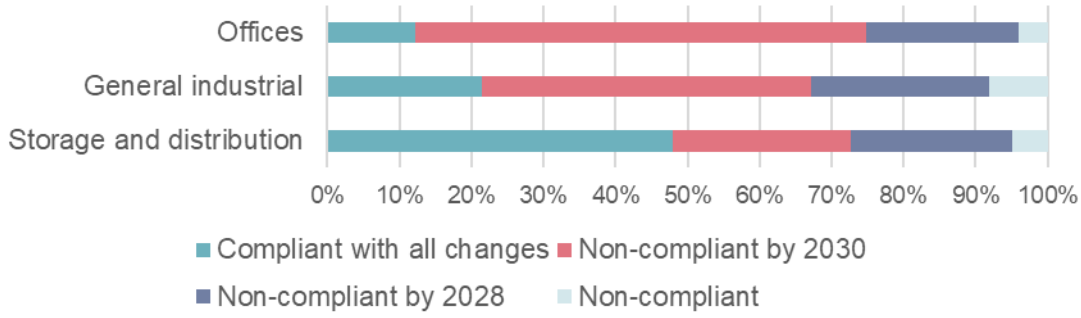
large proportion (52%) of the storage and distribution space is likely to be compliant with all changes to regulations, reflecting that large floorplates of high quality have been delivered in recent years. At a national scale, a greater proportion (78%) of the floorspace supply will be non-compliant by 2030.[54]

4.13 Office properties, likely reflecting the ageing nature of the stock in Huntingdonshire, and use of historic buildings, means the challenges are more pronounced for this use type. Nationally, it is estimated that 87% of the office stock in the major office markets will be non-compliant by 2030, which marries closely with the equivalent proportion in Huntingdonshire (88%).[55]

4.14 There are however exemptions to MEES. Landlords can register an exemption if they can prove that they have undertaken appropriate cost-effective improvements and the building still falls short of standards, or if the updates do not meet the seven-year payback test (meaning the improvement cost is not recouped via energy savings in seven years).[56] Other exemptions include if tenant consent, planning consent, or other third-party consents for improvements are refused, or for certain listed buildings where efficiency alterations would harm their character. These exemptions mean not every sub-standard property will necessarily be improved by required deadlines.

Figure 4.5 – A large proportion of Huntingdonshire's office stock will be non-compliant by 2030

The proportion of Huntingdonshire's non-domestic floorspace which will currently become non-compliant with MEES by 2030



Source: Ministry of Housing, Communities and Local Government, 2025. Energy Performance of Buildings Data: England and Wales.

4.15 The tightening of MEES could lead to assets becoming stranded, whereby poorer performing buildings become unattractive to prospective occupiers, and upgrading or retrofitting is perceived by landlords to be unfavourable, meaning premises remain vacant. Based on the widening of the scope of buildings which fall within the MEES regulations, this concern could accelerate over time. Although the direction of travel is undoubtedly towards higher energy efficiency, there remains a degree of uncertainty around the timeline for the implementation of MEES as the Government seeks further views on the achievability of new regulations and what could work best for businesses. In 2024, the Government conducted consultation on reforms to the Energy Performance of Buildings regime, although this includes retaining the headline carbon-focused metric for the time being.[57] The working assumption is that the MEES trajectory will be retained, and

[54] Savills, 2021. Achieving a good EPC is as easy as ABC for the industrial and logistics sector.

[55] Savills, 2021. How Sustainable is the Office Stock in the UK?

[56] Department for Energy Security and Net Zero, 2019. Guidance on PRS exemptions and Exemptions Register evidence requirements.

[57] Ministry of Housing, Communities and Local Government, 2024. Reforms to the Energy Performance of Buildings regime.

landlords, tenants and policymakers should be preparing for MEES to be tightened over the short term. In any case, occupier demand and the integration of EPC ratings into ESG strategies is likely to reflect a broader shift in demand to higher energy efficiency stock.

Permitted Development Rights

4.16 Permitted Development Rights (PDR) are national planning allowances that let certain building changes or use conversions proceed without a requirement for full planning permission.[58] In essence, they enable development 'without the need for a planning application', streamlining minor changes of use. These measures aim to boost housing delivery and flexibility in property use. PDR which could affect the stock of employment-generating floorspace include:

- The demolition of office, light industrial, or research and development space which was built before 1990, has been vacant for six months or more, and has a footprint of less than 1,000m^2 in size;
- The change of use of a building in commercial, business and new service use to a dwellinghouse (since March 2024 there has been no limit on vacant periods or floorspace size); and
- Conversion of a storage or distribution centre, or light industrial use under 500m^2 in size to residence(s).

4.17 On the one hand, PDR introduces flexibility and quicker repurposing of underused commercial buildings; on the other, they can lead to loss of employment space without local scrutiny or assessment. This can erode the supply of commercial premises and make it harder to plan adequately for employment needs. The Local Government Association (LGA) has strongly opposed PDRs that create new homes, stating 'there is no place in the current or future planning system' for such rights.[59] Their concern is that offices, shops or industrial sites converted to often substandard housing can undermine local economies and bypass developer contributions to infrastructure and other local needs. The Government's own research into office-to-residential PDR conversions found many units are very small and lack amenities, reinforcing these quality concerns.[60]

4.18 In Huntingdonshire, 26,000m^2 of office floorspace has been converted to residential via PDR between 2012 and 2021[61], equivalent to around 10% of the current amount of office stock. This has been concentrated in the town centres of Huntingdon, St Neots, St Ives and Ramsey. The Government is continually reviewing PDR policy. Further consultation has recently been conducted regarding expanding the scope of buildings which would be eligible to be converted through PDR.

Use Class E

4.19 When consulting on the expansion of PDR between 2018 and 2019, the Government decided it was more appropriate to overhaul the use class system and introduce a new Use Class E. This was adopted in 2020 and now comprises a range of previously distinct commercial, business and service uses. This brings together shops, financial and professional services, cafes and restaurants, offices, research and development, light industrial, and medical and health services as well as creche nurseries. The rationale for its introduction was to inject more resilience into town centres by facilitating the easier adaptation of commercial properties given changes between the uses the class now comprises would not be needed.

4.20 The flexibility of Class E floorspace could be beneficial for businesses and the commercial property market, and could potentially encourage (re)development. This flexibility nonetheless creates challenges for the

[58] UK Parliament, 2024. Planning in England: Permitted development and change of use.

[59] LGA, 2024. LGA submission to DLUHC's consultation on changes to various permitted development rights.

[60] UCL, 2020. Government publishes UCL-led research on permitted development housing quality.

[61] HDC, 2024. Huntingdonshire Business Completions and Commitments 2023/24.

robustness of planning evidence. The approach to employment needs assessments required by PPG scopes in consideration of office and industrial floorspace and distinguishes retail and leisure uses.[62] However Class E has blurred this distinction. Local authorities must plan for 'commercial' space as a whole, knowing that an office could become a shop or a gym, for example.

4.21 This process complicates forecasting. Demand is assessed by mapping the floorspace requirements of different sectors to use classes (e.g. office), yet existing and planned floorspace can change uses fluidly. Although practical factors like building design can limit such transitions, it is feasible that the stock of floorspace suited to specific business needs could fluctuate over the forecasting period.

Automation

4.22 The process of automation refers to the use of technology to perform tasks which would otherwise be completed with human intervention/involvement. Automation broadly reduces the requirement for human labour within a task. Optimism about 'reindustrialisation' of the UK economy stems from the prospect of enhanced productivity particularly within the manufacturing sector.[63] This will be supported through the use of robotics, or 'smart machines' with embodied intelligence and mobility that can both catalyse the growth of new industries as well as modernise traditional sectors.[64] The process of automation is expected to disproportionately impact traditional industries, more so than knowledge intensive sectors (see **Figure 4.6**).

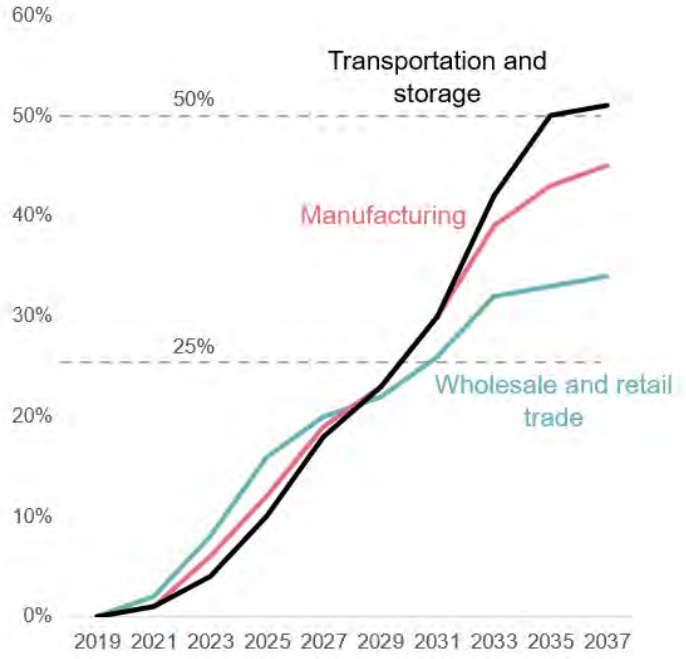
[62] Urbanist Architecture, 2025. New use class order 2020: Use Class E and the key changes explained.

[63] House of Commons Business, Energy and Industrial Strategy

[64] Robotics Growth Partnership, 2025. Smart Machines 2035: A Strategy for UK Leadership.

Figure 4.6 – Automation's impact on the job market is expected to be felt significantly over the next decade

Share of total jobs with a high potential of automation (global)



Source: World Economic Forum, 2019. 7 charts on the future of automation.

4.23 The process of automation, spanning for example the use of artificial intelligence (AI) in office work, robotics in manufacturing, and self-service technologies in retail is transforming both the nature of jobs in the UK and the spaces needed for them. Research estimates that the risk of automation of jobs is highest for the youngest and oldest workers, those in part-time employment, those with GCSE / A-level equivalent qualifications and below, and within those industries with a low proportion of high-skill jobs (see **Figure 4.7**).[65] In Huntingdonshire, 48% of jobs have some degree of risk of automation.[66] This is due to Huntingdonshire having a disproportionately high representation of industries likely to be impacted by processes of automation. Fewer jobs, for instance in a fully automated warehouse, might require lots of physical space but yield a lower employment density. Smart factories which utilise AI and advanced machinery could produce more output in the same or smaller footprint. A report by CBRE in 2024 suggested that AI-driven efficiency could even reduce overall demand for manufacturing space in the long term, as production becomes more streamlined.[67]

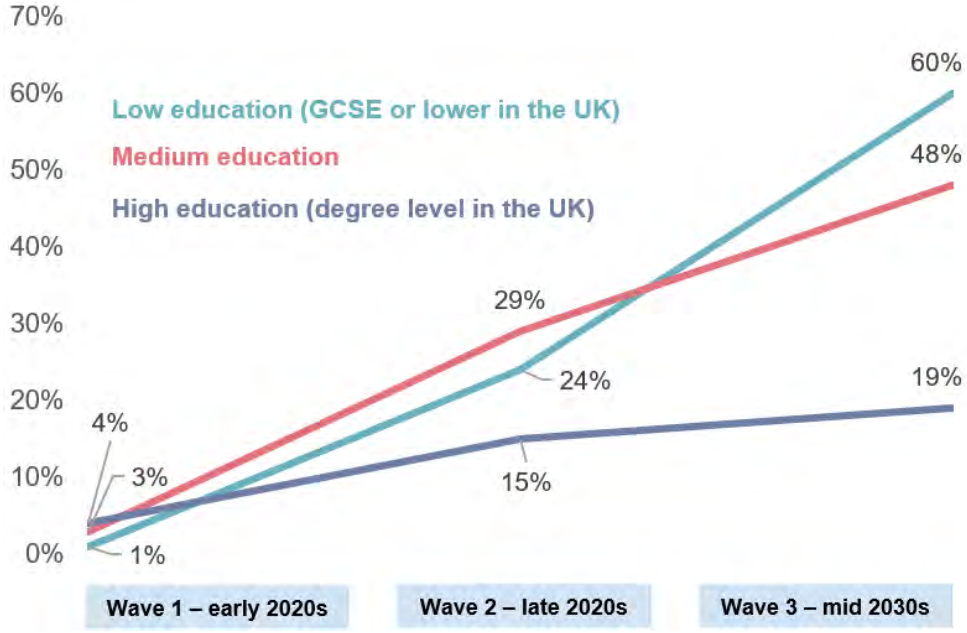
[65] Office for National Statistics, 2019. The probability of automation in England: 2011 and 2017.

[66] Office for National Statistics, 2019. The probability of automation in England: 2011 and 2017.

[67] CBRE, 2024. The future of AI and the impact on demand for workspace)

Figure 4.7 – Roles with lower skills requirements are at a higher risk of automation

Share of jobs with a high potential of automation by education level (global)



Source: World Economic Forum, 2019. 7 charts on the future of automation.

4.24 However, this observation could be an oversimplification that potentially negatively portrays the opportunities for creating high-value jobs in smart robotics, intelligent sensing, and autonomous systems. The UK's Smart Machines Strategy highlights the need for more exemplars of excellence in innovation that could incubate or accelerate the emergence of new businesses and provide opportunities for upskilling. Co-locating new and established businesses is seen as a possible strategy for providing pathways for skilled staff to '*transition from the world of science to the world of business*'.[68]

[68] Robotics Growth Partnership, 2025. Smart Machines 2035: A Strategy for UK Leadership.

5. Local context

Devolution and local government reorganisation

5.1 The English Devolution White Paper published in 2024 set out the Government's ambition to widen the redistribution of political, social and economic power to areas across England.[69] Huntingdonshire is part of the existing Cambridgeshire and Peterborough Mayoral Authority. As part of the plans for local government reorganisation, the two-tier authority will be replaced with a unitary authority. HDC along with Cambridgeshire County Council, Peterborough City Council, East Cambridgeshire District Council, Cambridge City Council and South Cambridgeshire District Council issued a response in March 2025 which expressed broad support for a new system of local government.[70] It is expected that a full proposal for reorganisation will be submitted in November 2025.

'Devolution means more investment in local areas. We will strengthen Mayors' ability to attract international investment, support businesses to thrive and grow, and create vibrant places where people want to live and work.'[71]

5.2 The role of Huntingdonshire within a unitary authority presents opportunities for improved policy alignment for housing and employment planning purposes. This could help identify and prioritise strategic sites at a broader scale and allow for the redirecting and sharing of growth across current boundaries.

5.3 The reorganisation of local government presents challenges to the applicability of the assessment of economic needs over the study period which includes the date at which a unitary authority is expected to be implemented. The findings and recommendations with regard to scale and capacity for growth should be revisited once the strategic and political considerations have been finalised.

Logistics

5.4 The logistics sector facilitates the transportation of goods and materials between suppliers and customers. Freight is moved via road, rail, sea and air. The supply chains, businesses and employment the logistics sector supports contribute over £160 billion to the UK economy, or around 7% of GDP, although the performance of the sector across dimensions such as timeliness and efficiency, measured by the World Bank Logistics Performance Index, has been declining relative to international competitors since 2014.[72] Facilitating efficient logistics operations is beneficial for the economy through expanding markets and therefore heightening competition and innovation, suggesting the UK could be taking additional steps to support the industry.[73]

[69] Ministry of Housing, Communities and Local Government, 2024. English Devolution White Paper.

[70] Huntingdonshire District Council, 2025. Local Government Reorganisation.

[71] Ministry of Housing, Communities and Local Government, 2024. English Devolution White Paper.

[72] Oxford Economics, 2023. Logistics: Delivering a Solution to the UK's Productivity Puzzle.

[73] Oxford Economics, 2023. Logistics: Delivering a Solution to the UK's Productivity Puzzle.

5.5 The enduring popularity of e-commerce generates demand for logistics space. Around a quarter of total retail sales are conducted online meaning goods need to be stored and dispatched from warehouse premises rather than physical retail stores.[74] This requires a range of spaces to fulfil this ranging from large-scale fulfilment centres to last-mile logistics hubs, the latter responding to consumer expectations for more rapid deliveries. The British Property Federation (BPF) considers additional drivers of the growth in demand for logistics space to comprise: stockpiling, robotics and automation, Internet of Things, data centres, dark kitchens, housing growth, new occupations, online sales, growth in freight, office co-location and near-shoring/re-shoring.[75,76]

5.6 These drivers have prompted a reorganisation of the freight landscape such that rather than goods flowing from regional distribution centres to warehouses to retail outlets, the logistics premises itself is the anchor in a network of flows, facilitating returns, storage, collection points and other co-located functions.[77] The logistics sector requires employment spaces of varying sizes to facilitate this distribution network, ranging from strategic scale national and regional distribution centres to last mile fulfilment centres and collection points, as shown in **Table 5.1**. PPG specifies that the logistics sector warrants particular attention when formulating employment land policies because of the land-intensive requirements of strategic scale facilities.[78]

'The logistics industry plays a critical role in enabling an efficient, sustainable and effective supply of goods for consumers and businesses, as well as contributing to local employment opportunities, and has distinct locational requirements that need to be considered in formulating planning policies.'[79]

Table 5.1 – The logistics sector requires employment spaces of varying sizes

Typology of logistics space

Type	Characteristics
National distribution centres	46,000m^2 – 93,000m^2 on up to 40 ha • In the centre or along the spine of the country • Direct access to the transport network • Close proximity to labour • Have a large power supply
Regional distribution centres	19,000m^2 – 46,000m^2 over 2 ha

[74] Office for National Statistics, 2025. Retail Sales Index time series (DRSI).

[75] Near-shoring refers to the movement of production or services closer to a business' main consumer market. Re-shoring, as opposed to off-shoring, refers to the return of business operations that had previously been moved overseas.

[76] British Property Federation, 2022. Levelling Up: The Logic of Logistics.

[77] Rodrigue, J., 2020. The distribution network of Amazon and the footprint of freight digitalisation.

[78] Ministry of Housing, Communities and Local Government, 2024. Housing and economic needs assessments.

[79] Ministry of Housing, Communities and Local Government, 2024. Housing and economic needs assessments.

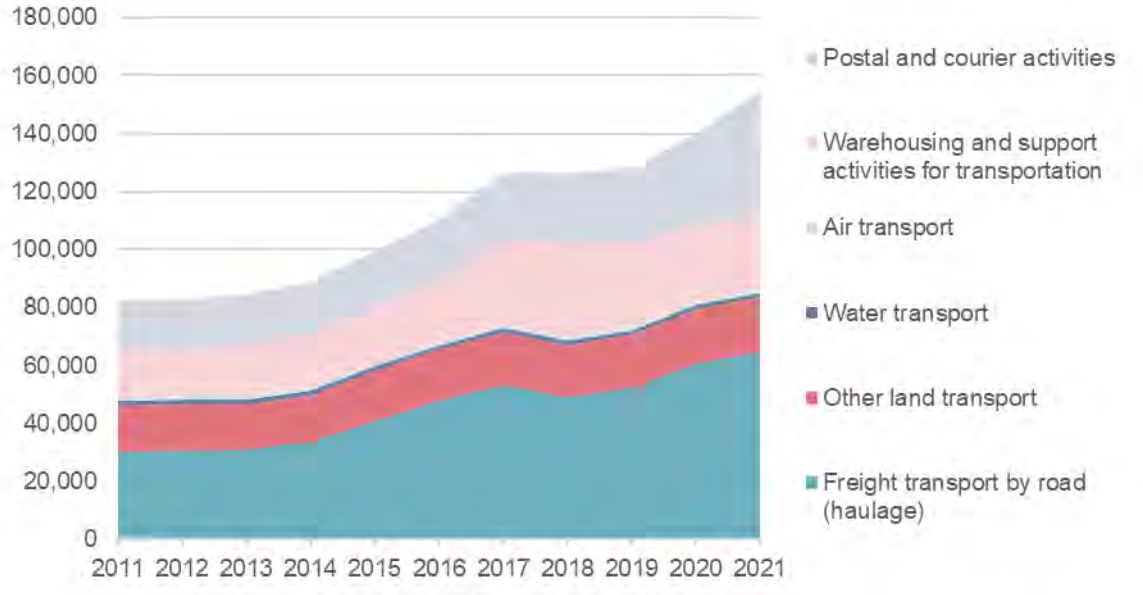
Type	Characteristics
Last mile fulfilment	Up to 9,000m^2 on a minimum 2 ha site (less in urban areas)
Pick-up points	A location to which consumers travel to collect parcels

Source: Turley/BPF, 2019. What Warehousing Where? Understanding the Relationship between Homes and Warehouses to Enable Positive Planning.

5.7 Huntingdonshire is traversed by two major Strategic Road Network routes, with a third crossing the local authority boundary in the south. The A1 which provides a long distance north-south route across the country, and the A14 which similarly connects the east and west of the country, intersect at Huntingdon. The A428 in the south of the district connects Huntingdonshire with Cambridge and the M1 to the west. The A14 Cambridge to Huntingdon improvement scheme was a £1.5 billion project which provided a transformative upgrade of the road network around Huntingdon comprising a new bypass, widened road sections, improved junctions and town centre improvements.[80] The strategic location which has recently benefited from these measures to alleviate congestion positions Huntingdonshire optimally for logistics (storage and distribution) activities. The SRN is a critical enabler of logistics activity given 81% of domestic freight is transported by road.[81] Between 2011 and 2021, haulage activities accounted for most of the increase in occupation of business premises for transport and storage.[82]

Figure 5.1 – Freight transport by road (haulage) accounted for the most of the growth in the number of business premises used for transport and storage nationally

Number of business premises used for transport and storage by sub-category in the UK (2011 – 2021)



Source: Office for National Statistics, 2022. The rise of the UK warehouse and the "golden logistics triangle".

[80] National Highways, 2022. A14 Cambridge to Huntingdon.

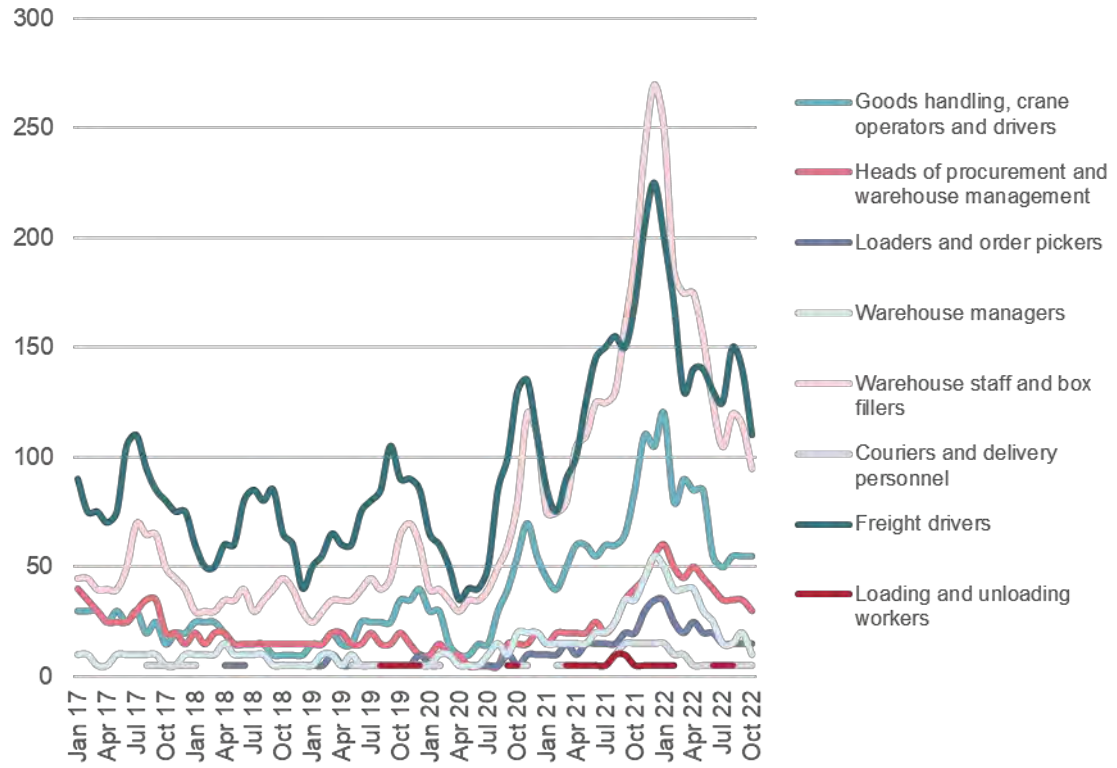
[81] Logistics UK, 2024. The UK Logistics Network.

[82] Office for National Statistics, 2022. The rise of the UK warehouse and the "golden logistics triangle".

5.8 The BPF reports that the logistics sector is often associated with negative perceptions about low pay and skill levels, and that the occupations are actually becoming more diverse, likely as the industry adopts new technologies and advanced processes.[83] The logistics sector is potentially facing skill shortages as demand for the right skills outstrips available workforce.[84] In Huntingdonshire, freight drivers, warehouse staff and box fillers are particularly in demand although the number of job postings has decreased since a peak during the coronavirus pandemic.[85]

Figure 5.2 – Freight drivers, warehouse staff and box fillers are in demand in Huntingdonshire

Job posting by detailed profession in Huntingdonshire (2017 – 2022)



Source: Office for National Statistics, 2022. Labour demand volumes by profession and local authority, UK.

Knowledge and innovation

5.9 Innovation is the process of developing and applying new ideas, technologies, or methods to create value, enhance efficiency, or solve complex problems. It encompasses not only the invention of novel products and services, but also the transformation of processes, business models, and systems to generate measurable improvement. At its core, innovation involves harnessing creativity, knowledge, and collaboration to drive

[83] British Property Federation, 2022. Levelling Up: The Logic of Logistics.

[84] Logistics UK, 2023. Logistics Skills Review 2023.

[85] Office for National Statistics, 2022. Labour demand volumes by profession and local authority, UK.

progress and adapt to evolving needs.[86] Relatedly, the knowledge economy is concerned with growth being primarily driven by the production, distribution, and use of knowledge and information, rather than the traditional factors of production like land, labour, and capital. It emphasises high-skilled labour, research and development, innovation, and the use of digital technologies to create value.[87]

'Research and innovation enriches and improves our lives and increases prosperity by creating knowledge that enables us to understand ourselves and the world around us. This also empowers us to focus on the many challenges we face as individuals and as communities, nationally and globally.'[88]

5.10 The innovation ecosystem in the UK is comprised of funding bodies, organisations and businesses, as well as a range of additional supporting institutions, and relies on clusters of activities which are often spatially located in proximity to an anchor institution (**Table 5.2**). Huntingdonshire is located within the UK Innovation Corridor, with the CPCA and CCC being members. The nearby University of Cambridge is consistently ranked amongst the top ten universities in the world. Within and around Cambridge (the highest ranked city in the world for innovation per capita), there are internationally significant facilities such as the "Nobel prize factory"[89] at the MRC Laboratory of Molecular Biology (LMB), as well as Cambridge Science Park, Cambridge Biomedical Campus, and Babraham Research Campus.

Table 5.2 – The innovation ecosystem in the UK requires various institutions

Innovation institutions

Innovation institutions	Definition
Universities and research organisations	The UK's universities are amongst the best in the world, with the UK being responsible (despite comprising less than 1% of the global population) for 14% of the world's most highly-cited academic publications.
Public Sector Research Establishments (PSRE)	'*PSREs are public bodies carrying out research that supports a wide range of government objectives, including informing policy making, statutory and regulatory functions and providing a national strategic resource in key areas of [scientific research]*.'
Catapults and innovation centres	'*Catapults bridge the gap between innovative businesses and the research communities, taking an active role in removing industry-wide barriers to innovation and commercialisation. They manage innovation risks through the provision of R&D infrastructure, specialist knowledge and expertise, partnership and collaboration building capabilities, and business support*.'

[86] UK Research and Innovation, 2022. UKRI Strategy 2022 – 2027.

[87] Kent County Council, 2025. The Knowledge Economy.

[88] UK Research and Innovation, 2025. Our vision.

[89] Department for Business, Energy and Industrial Strategy, 2021. UK Innovation Strategy: Leading the future by creating it.

Innovation institutions	Definition
Business accelerators and incubators	'*Accelerators and incubators are organisations that provide support to start-ups through the early stages of growth. While incubators support start-ups at the start of the process of building up their business, accelerators support the advancement of the growth of an existing business which already has an idea and business model in place.'*
Science and innovation parks/innovation districts	*Science and innovation parks are dedicated clusters of offices, laboratories and workspaces for knowledge intensive businesses, while innovation districts are networks of organisations in major cities that produce and commercialise knowledge. Cambridge is Europe's largest technology cluster.*
Research Infrastructure (RI)	*'Research Infrastructures (RIs) are facilities, resources and services used by the research community to conduct research and foster innovation.'*

Source: Department for Business, Energy and Industrial Strategy, 2021. UK Innovation Strategy: Leading the future by creating it.

5.11 Compared to its local authority neighbours within the CPCA area, Huntingdonshire has a lower proportion of knowledge intensive employment and limited growth in both knowledge and non-knowledge intensive industries in the six years to 2023/24.[90] The proportion of businesses which are 'innovation active' in the East of England has only marginally increased since 2016, with main barriers of increasing performance over this time relating to increases in energy prices and lack of qualified personnel.[91] The technologies which will be critical for the UK to harness to capitalise on its existing strengths are: artificial intelligence, engineering biology, future telecommunications, semiconductors and quantum technologies.[92]

Table 5.3 Employment in Huntingdonshire is not knowledge intensive and has recently seen relatively weak growth compared to its neighbours

Corporate employment growth Cambridgeshire and Peterborough, by district (2017/18 – 2023/24)

District	Knowledge intensive employment (%)	Change in knowledge intensive employment (%, 2017/18 – 2023/24)	Change in non-knowledge intensive employment (%, 2017/18 – 2023/24)	Change in all employment (%, 2017/18 – 2023/24)
South Cambridgeshire	52%	5.1%	2.9%	4.0%
Cambridge	47%	8.3%	3.1%	5.3%
CPCA	**31%**	**4.6%**	**2.8%**	**3.3%**
Peterborough	20%	0.6%	4.5%	3.7%

[90] Cambridge Ahead/CBR, 2025. Growth in the Cambridgeshire and Peterborough economy 2018-24.

[91] Department for Business and Trade, 2024. United Kingdom innovation survey 2023 report,

[92] Department for Science, Innovation and Technology, 2023. Science and Technology Framework – taking a systems approach to UK science and technology.

District	Knowledge intensive employment (%)	Change in knowledge intensive employment (%, 2017/18 – 2023/24)	Change in non-knowledge intensive employment (%, 2017/18 – 2023/24)	Change in all employment (%, 2017/18 – 2023/24)
East Cambridgeshire	18%	2.7%	2.3%	2.4%
Huntingdonshire	**15%**	**1.5%**	**1.3%**	**1.3%**
Fenland	6%	3.7%	1.4%	1.5%

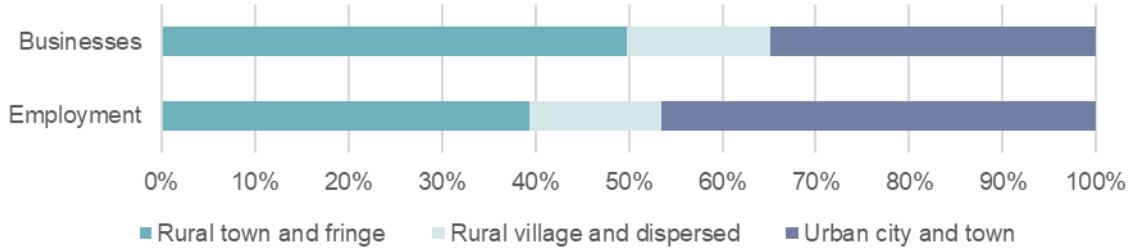
Source: Cambridge Ahead/CBR, 2025. Growth in the Cambridgeshire and Peterborough economy 2018-24.

Rural economy

5.12 Huntingdonshire is classified as a mainly rural local authority.[93] Half of all employment and two thirds of businesses are located in rural areas.[94] The agriculture, forestry and fishing industries dominate the land use of rural areas, but there are also greater than average representations of real estate and manufacturing industries.[95]

Figure 5.3 – More than half of all businesses and employment in Huntingdonshire is in rural areas

Businesses and employment by rural-urban classification



Source: Office for National Statistics, 2024. Business Register and Employment Survey 2023. Office for National Statistics, 2025. UK Business Counts 2024.

5.13 The rural economy comprises the businesses operating outside of urban areas across the UK. A number of features distinguish the rural economy from its urban counterpart including:

- higher employment rates;
- those living in predominantly rural areas have higher earnings than those who work there;
- productivity per job is lower than the national average; and

[93] Department for Environment, Food and Rural Affairs, 2025. Statistical Digest of Rural England: 7 – Rural Economic Bulletin.

[94] Office for National Statistics, 2024. Business Register and Employment Survey 2023. Office for National Statistics, 2025. UK Business Counts 2024.

[95] House of Commons Library, 2024. The rural economy.

- more business are small and medium enterprises (SMEs) and more people are employed in SMEs.

5.14 The challenges facing the rural economy relate to its lower productivity, despite the potential that a more proportional industry mix, higher growth, and access to skilled labour has to address this.[96] The multi-functional use of rural land will be important for balancing competing demands for '*land for development, agriculture, energy, recreation, conservation and other uses'*.[97] The Government is consulting on the trajectory for land use change to 2050 and the proportion of agricultural land which could change to alternative uses for environmental and climate benefits as well as to facilitate urban expansions.[98] Evolving land use management and the ability to unlock development is a focus of the current Government.[99]

5.15 Diversification refers to the creative adaptation of revenue streams applied by rural businesses. The implication for employment purposes is that landowners could broaden income sources through workspace provision by converting buildings into office or studio space, or provide remote working hubs. Other measures could include exploring tourism, renewable energy, retail and hospitality space. Permitted development rights are an enabler of this versatility because agricultural buildings of a limited size can be more readily reused for flexible commercial use including offices and light industrial activity.[100] There is a noted lack of suitable workspaces with smaller floorplates suitable for businesses which are started up from home to scale-up in[101], although the proportion of farms which let buildings (which could include for employment-generating uses) has increased over time.[102]

[96] The Rural Coalition, 2024. Reigniting rural futures: Rural communities' capacity to boost economic growth.

[97] House of Lords Select Committee on the Rural Economy, 2019. Time for a strategy for the rural economy.

[98] HM Government, 2025. Land Use Consultation.

[99] Savills, 2025. UK Cross Sector Outlook 2025: Rural.

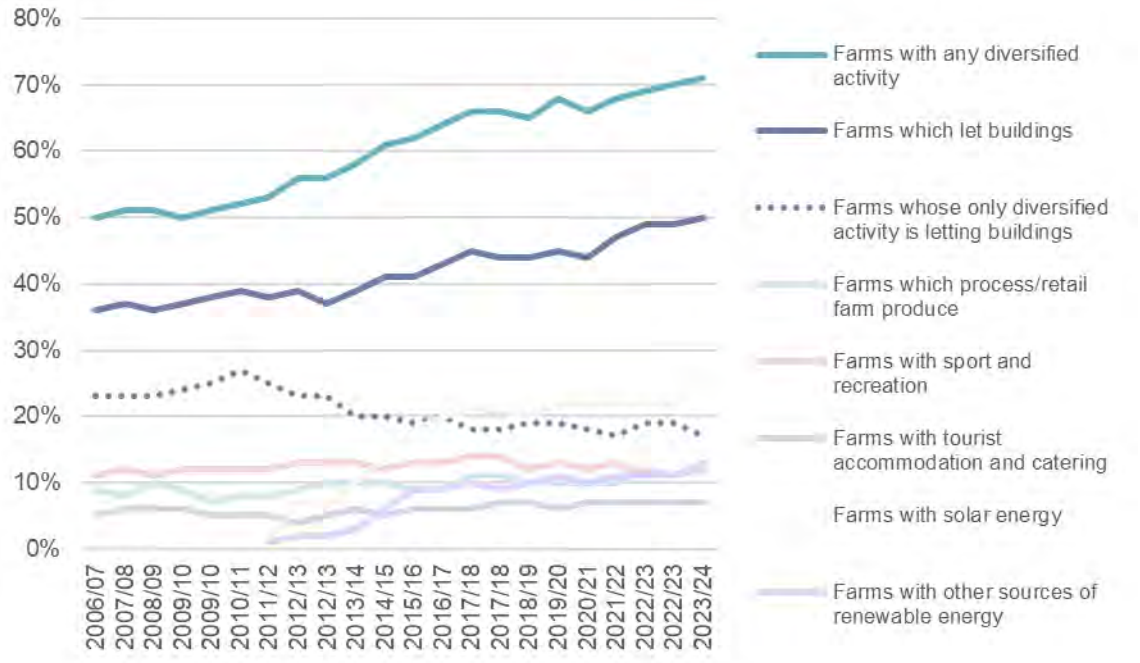
[100] Department for Environment, Food and Rural Affairs, 2024. Changes to permitted development rights.

[101] House of Lords Select Committee on the Rural Economy, 2019. Time for a strategy for the rural economy.

[102] Department for Environment, Food and Rural Affairs, 2024. Farm Accounts in England data sets.

Figure 5.4 – The proportion of farms which have diversified income through letting buildings has increased over time

Proportion of farms in England with diversified activities (2006/7 – 2023/24)



Source: Department for Environment, Food and Rural Affairs, 2024. Farm Accounts in England data sets. Note data is available at more regular intervals in some years.

Alconbury Enterprise Zone

5.16 Enterprise Zones (EZ) in the UK are designated areas that aim to drive economic growth and job creation by offering targeted incentives to businesses. Introduced by the Government in 2012, these zones are typically located in areas with untapped potential or in need of regeneration.[103] They provide benefits such as business rate discounts, enhanced capital allowances, and simplified planning processes to attract investment and stimulate development. Enterprise Zones are part of the UK's broader strategy to rebalance the economy (following the then localism agenda), support innovation, and promote sector-specific clusters. The rationale behind the creation of Enterprise Zones was guided by identifying areas of genuine opportunity, long-term viability, strategic fit, and the minimisation of displacement.

5.17 Alconbury Enterprise Zone was granted Enterprise Zone status in 2012 with the aim of creating around 8,000 jobs. The intended specialist sectors to be encouraged and attracted to the EZ are: advanced manufacturing, ICT, industrial biotechnology, and low carbon.[104] The masterplan for Alconbury Weald includes around 5,000 homes and up to 290,000m^2 of employment floorspace, of which around a third of commercial space and a number of homes have been delivered. A further 1,500 homes have also recently been approved at Grange Farm. Of the employment generating floorspace within the scope of the EENA

[103] House of Commons Library, 2024. Enterprise Zones.

[104] House of Commons Library, 2024. Enterprise Zones.

that has been delivered, 86% (86,000m^2) is in storage and distribution use and 13% (12,500m^2) is in office use.[105]

5.18 The implementation of Enterprise Zones nationally has varied in success. Research suggests that only a fraction of the jobs that were estimated to be generated by the policy materialised, and jobs were found to be displaced from elsewhere meaning the zones have in part redistributed rather than grown the total number of jobs.[106]

[105] CoStar, 2025.

[106] Centre for Cities, 2019. In the zone? Have enterprise zones delivered the jobs they promised?

6. Functional Economic Market Area

What is a Functional Economic Market Area?

6.1 A Functional Economic Market Area (FEMA) is a bespoke geography which describes a self-contained area with strong economic linkages i.e. an area in which people live, work, consume goods, and tend to travel within. It is where businesses, organisations and authorities have strong relationships and operate across because of their interlinkages. People and businesses would recognise these areas as their 'everyday spheres'.

6.2 FEMAs are defined for spatial planning purposes to facilitate co-operation between planning authorities.[107] Plans setting out future development aspirations and the location and scale of growth do not sit in isolation, and should appreciate the wider context in which they sit. This recognises that administrative boundaries are sometimes fuzzy in relation to people's lives. Administrative boundaries may also be blind to appropriate, accessible locations for employment space near to clusters of economic activity, and smoother co-operation between authorities may facilitate bringing forward development near to and across boundaries. Defining a FEMA is important for getting to grips with a more 'real' or lived geography.

Role of an identified FEMA in the EENA

6.3 A specific application of defined FEMAs is within economic needs assessments. These assessments provide an evidence base to guide the planning approach to safeguarding employment generating land and identifying new growth opportunities, therefore supporting future jobs. A defined FEMA is used within economic needs assessments as a comparator geography to contextualise the socio-economic and property market profile of the area of interest. Understanding the geographies of FEMAs can act as a starting point for duty to cooperate discussions.[108] The FEMA is also used when providing recommendations about how the approach within the area of interest relates to what is happening in the rest of the area in which local people work. Guidance states that '*the geography of commercial property markets should be thought of in terms of the requirements of the market in terms of the location of premises, and the spatial factors used in analysing supply and demand, often referred to as the functional economic market area'*.[109] The Planning Practice Guidance further acknowledges that for strategic matters, the most appropriate geography for policy development may extend beyond individual authority boundaries and instead align with broader functional areas such as housing market or travel to work areas.

Approach to identifying the FEMA

6.4 Guidance does not tell us how to identify a FEMA from a methodological point of view – there is no standard approach in recognition of the natural variability in patterns of economic activity – but available planning

[107] Ministry of Housing, Communities and Local Government, 2024. Planning practice guidance: Plan-making.

[108] Ministry of Housing, Communities and Local Government, 2024. Planning practice guidance: Plan-making.

[109] Ministry of Housing, Communities and Local Government, 2024. Planning practice guidance: Plan-making.

practice guidance[110] does indicate the factors which could be taken into account. The source of the data utilised to address these factors is shown in **Table 6.1**.

Table 6.1 – PPG recommends considering a number of factors to characterise a FEMA

Recommended factors to characterise a FEMA and the data sources used to address these

Recommended factors	Data sources used
Extent of any Local Enterprise Partnership (now assumed to reflect economic/strategic partnerships) within the area	CPCA area, the UK Innovation Corridor[111], and the Oxford-Cambridge arc.
Travel to work areas	Office for National Statistics origin-destination data from the Census 2021.[112]
Housing market areas	Cambridge Sub-regional Housing Market area.[113]
Flow of goods, services and information within the local economy	Consumer spending flow data.[114]
Service market for consumers	
Administrative areas	Huntingdonshire, Cambridgeshire, CPCA, the three 2023 parliamentary constituencies that cover Huntingdonshire.[115]
Catchment areas of facilities providing cultural and social wellbeing	Not applied for this analysis.
Transport network	Spatial analysis of average commuting time.[116]

6.5 A simplistic approach would be to group local authorities into a FEMA if they share an indicative number of characteristics across these stated indicators. In geographical terms, the FEMA would reflect the administrative boundaries of selected local authorities. This approach has the benefit of facilitating more straightforward duty to co-operate discussions, and potentially making data collection easier. However, the limitation of this approach is in conflict with the rationale for defining a FEMA i.e. establishing a representative interpretation of the geography of the local economy.

6.6 A more sophisticated approach, as adopted in the following analysis, is to define the FEMA using a composite of indicators at a higher level of spatial granularity. This utilises data pertaining to smaller geographies, and is cognisant of, but ultimately oversteps where appropriate, administrative boundaries.

[110] Ministry of Housing, Communities and Local Government, 2024. Planning practice guidance: Plan-making.

[111] UK Innovation Corridor, 2025. The Corridor. Retrieved from: https://innovationcorridor.uk/the-corridor/ (Accessed February 2025).

[112] Office for National Statistics, 2023. Origin-destination (flow) data.

[113] GL Hearn, 2021. Housing Needs of Specific Groups: Cambridgeshire and West Suffolk.

[114] Office for National Statistics, 2024. Consumer card spending, flow of spending across the UK: 2019 to 2023.

[115] UK Parliament, 2024. Parliamentary constituencies. Retrieved from: https://www.parliament.uk/about/how/elections-and-voting/constituencies/ (Accessed April 2025).

[116] Department for Transport, 2024. National Travel Survey: 2023. NTS0403f: Average trip time by trip purpose (minutes): England, 1995 onwards.

Volterra has developed an approach to identifying FEMAs which takes into account key economic linkages in order to describe the FEMA at a high level of spatial granularity. The remainder of this note sets out in further detail how each of the contributing indicators have been analysed, and amalgamated to establish a contiguous FEMA geography for Huntingdonshire. This incorporates the use of geographical information systems (GIS), cluster analysis, and spatial analysis of travel networks and commuting datasets.

6.7 Defining a FEMA is not an exact science but a process to refine the "best fit" functional geography.

Identifying Huntingdonshire's FEMA

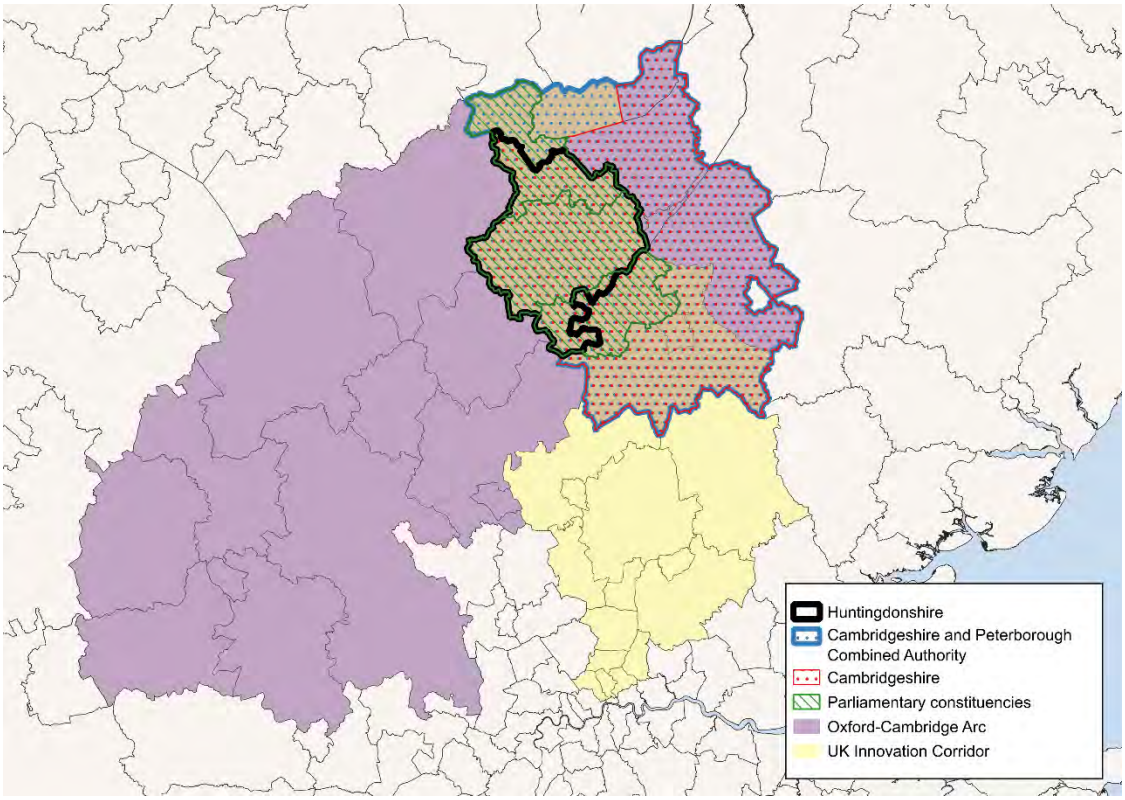
Administrative and economic partnership geographies

6.8 Established administrative and economic partnership areas serve as a useful starting point for determining the functional relationship of Huntingdonshire with its neighbouring areas. Administratively/politically, Huntingdonshire is within the Cambridgeshire and Peterborough Combined Authority, and Cambridgeshire county. The three parliamentary constituencies which intersect with the Huntingdonshire boundary are: Huntingdon, North West Cambridgeshire, and St Neots and Mid Cambridgeshire. Strategically, Huntingdonshire is within both the Oxford-Cambridge Arc and UK Innovation Corridor (with Huntingdonshire located within the northern Cambridgeshire Science & Tech Cluster portion).[117] **Figure 6.1** shows how these geographies overlap.

[117] UK Innovation Corridor, 2025. The Corridor. Retrieved from: https://innovationcorridor.uk/the-corridor/ (Accessed February 2025).

Figure 6.1 – Huntingdonshire is located within a number of administrative and strategic economic partnership areas

Huntingdonshire's administrative and strategic economic partnership geographies



Source: Open Geography Portal, 2024.

Commuter flows

6.9 Office for National Statistics data on commuter flows shows the origin (residence) and destination (workplace) of those travelling to/from work.[118] This is based on Census data collected in 2021. This was during the coronavirus pandemic when restrictions were in place, which could have affected the way people travel to work, and also how they interpret and answer Census questioning on usual place of work. Consequently, there is some uncertainty about whether the data is a true reflection of commuting patterns in the absence of such restrictions. Nonetheless, commuter flow data does give an indication of the patterns of commuting, which can be sense checked through comparison to other data sources, in line with the approach taken in this analysis.[119]

6.10 In 2021, excluding those who worked from home, there was typically a daily net outflow of 3,400 workers (those aged 16 and over and in employment) to Huntingdonshire, comprising 16,100 workers who commuted into or across the local authority area to a place of work in Huntingdonshire, compared to 19,500

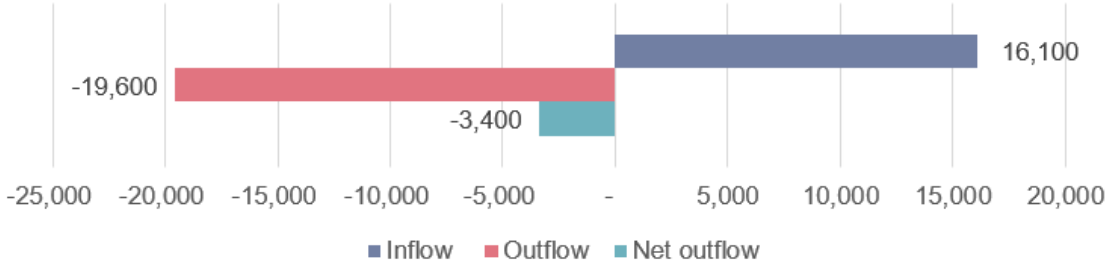
[118] Office for National Statistics, 2023. Origin-destination (flow) data.

[119] Office for National Statistics, 2023. User guide to Census 2021 Origin-destination data, England and Wales.

who commuted out of the local authority area. The net flow of workers who do not work from home has an implication on the demand for employment spaces.

Figure 6.2 – There is a daily net outflow of commuters into and across Huntingdonshire

Daily flows of commuters to/from Huntingdonshire (excluding those who work from home)



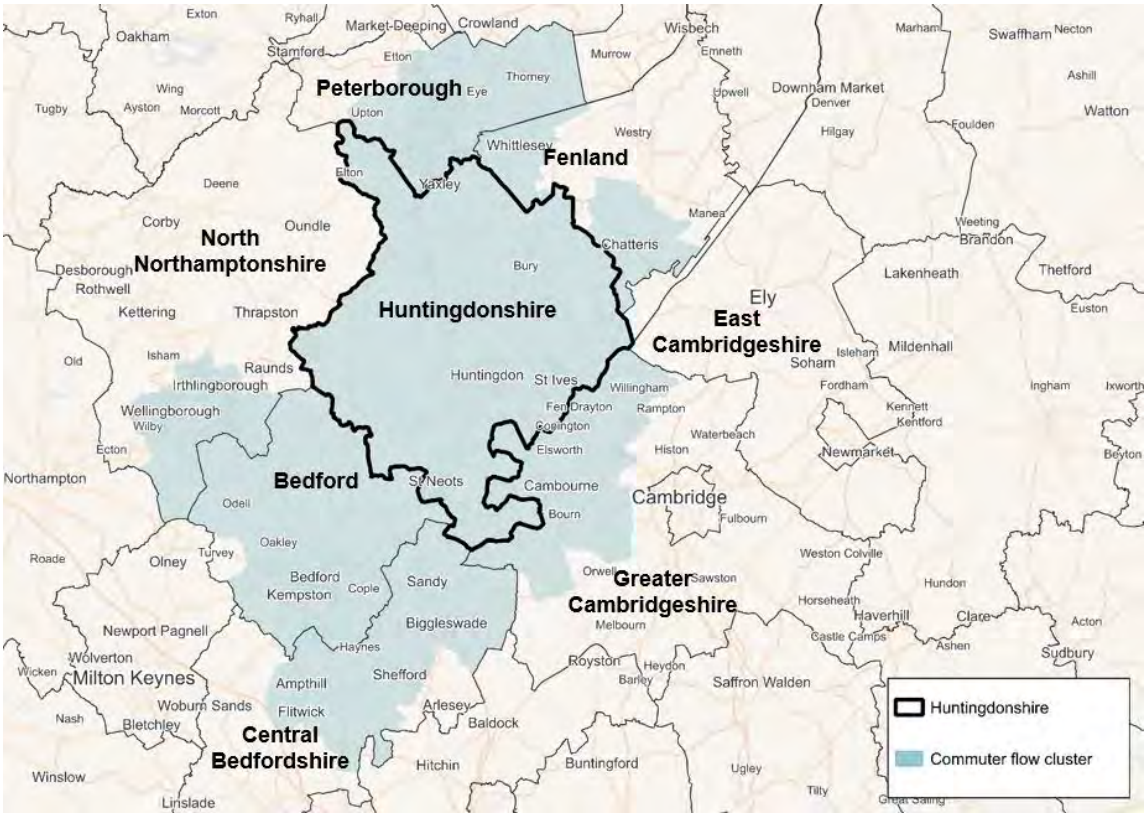
6.11 The most recent Census data (2021) was collected at a time when some coronavirus pandemic restrictions were in place. These restrictions potentially affected the magnitude of homeworking reflected in data, and therefore the degree to which areas would be considered self-contained. For the purposes of the EENA it is important to consider the demand on employment space driven by commuting to places of work, therefore the following analysis has also considered flows of commuters beyond the Huntingdonshire boundary.

6.12 The approach to assessing commuter flows employs a graph-based tool. This is based on a graph clustering algorithm which detects clusters within complex networks, such as the commuter flow matrix i.e. the flows of commuters between the small geographies that cover the country.[120] By considering the patterns of inflows and outflows across these, an area which comprises all of the clusters of commuting patterns that contain an area of Huntingdonshire is identified. This is shown in **Figure 6.3**.

[120] Clauset, A., Newman, M. E. J., and Moore, C., 2004. Finding community structure in very large networks.

Figure 6.3 – Commuter flow patterns show strong relationships between Huntingdonshire with Peterborough, Bedfordshire and South Cambridgeshire

Commuter flow pattern clustering exercise



Source: Office for National Statistics, 2023. Census 2021 Origin-destination (flow) data.

Transport networks: road

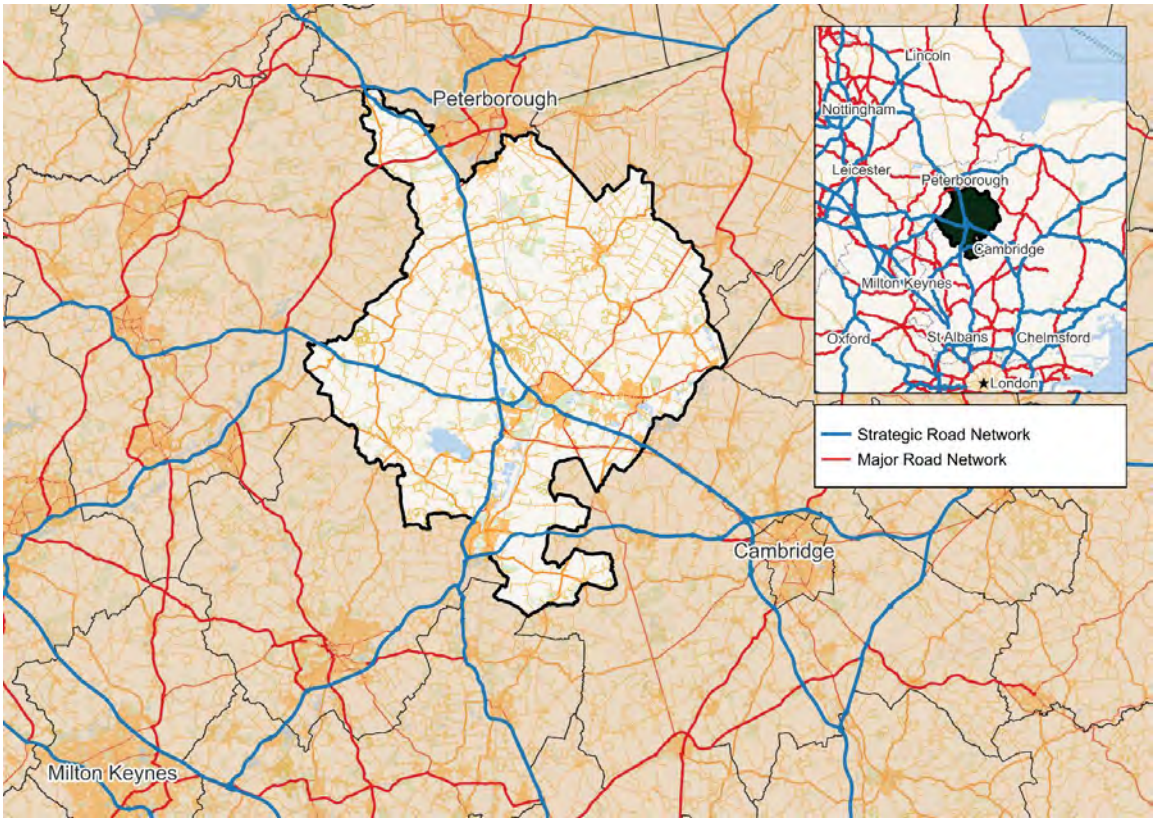
6.13 The road network serves a key role in facilitating commuting to/from places of work, as well as the distribution of goods. In Huntingdonshire there are major routes and intersections of the Strategic Road Network (SRN) and Major Road Network (MRN) including the A1(M), A14 and A428 routes. These are shown in **Figure 6.4**.

6.14 In Huntingdonshire, 52% of usual residents aged 16 years or over in employment, equivalent to 47,300 people, travel by road to work either by driving or being a passenger in a car or van.[121] The following analysis considers how the road network facilitates commuting by assessing average journey durations and distances by road to places of work to assess in further detail the typical spatial patterns of commuting in Huntingdonshire. This also serves to 'sense check' the origin-destination analysis presented above by presenting a comparator view on commuting behaviours.

[121] Office for National Statistics, 2022. Census 2021.

Figure 6.4 – Huntingdonshire is well connected to the Strategic Road Network

Strategic and Major Road Networks



-Source: Volterra analysis of Open Street Map and National Highways data.

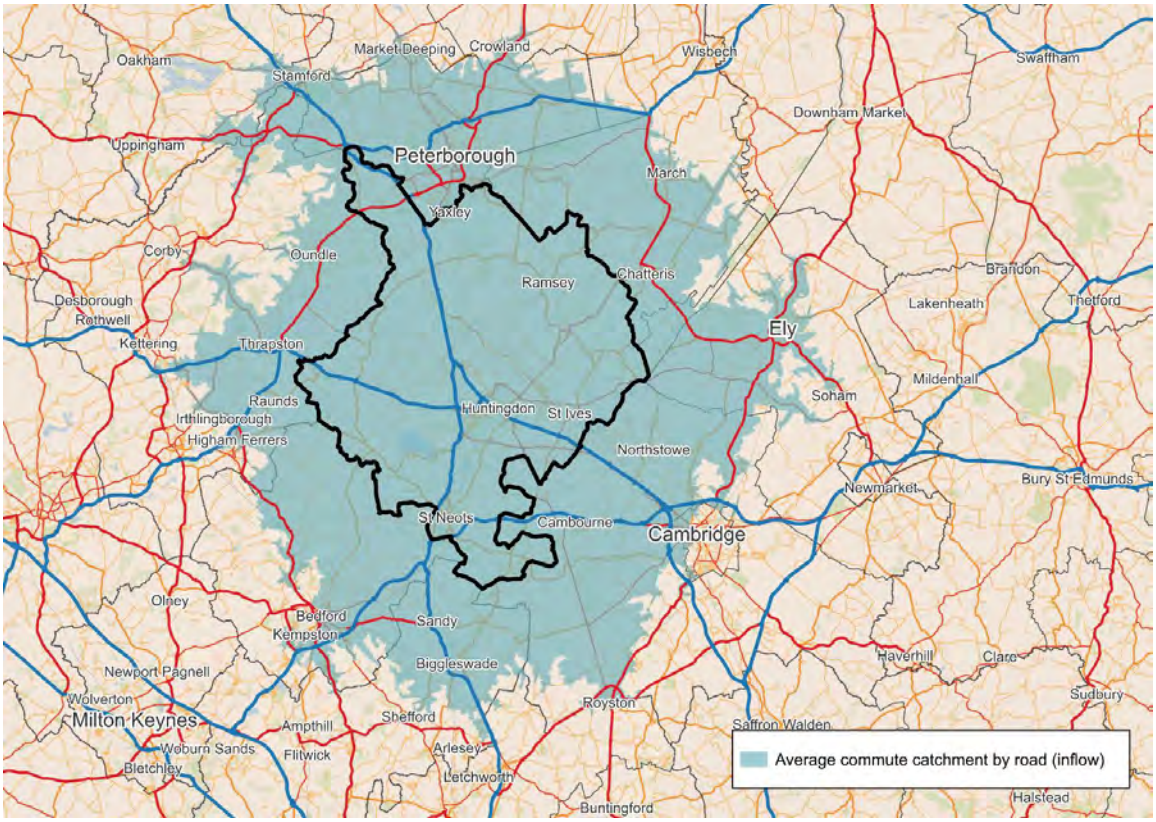
Journey duration

6.15 According to the latest National Travel Survey data, in 2023 the average trip time for the purposes of commuting was 30 minutes.[122] The main clusters of workplaces in Huntingdonshire are used as a destination in spatial travel time analysis. This uses GIS tools to identify the catchment areas for commuters arriving at these workplace destinations on a typical weekday morning (**inflow**). Based on average journey duration for people travelling to work in Huntingdonshire, workers would be expected to travel from across a radius stretching between North Hertfordshire, South Kesteven, Ely and Kettering.

[122] Department for Transport, 2024. National Travel Survey: 2023. NTS0403f: Average trip time by trip purpose (minutes): England, 1995 onwards.

Figure 6.5 – The SRN and MRN facilitate in-commuting to Huntingdonshire's workplaces across a radius stretching between North Hertfordshire, South Kesteven, Ely and Kettering

Commute catchment area by road based on average journey duration



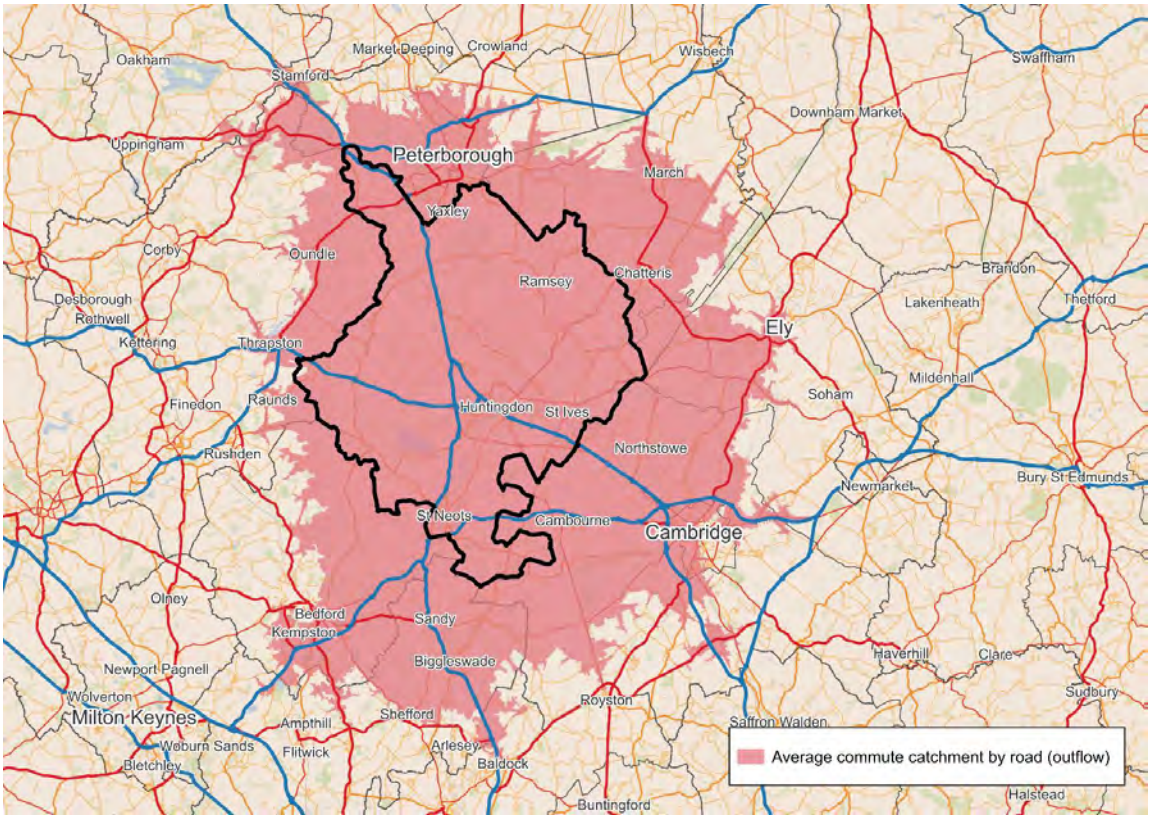
Source: TravelTime. Note: this analysis is conducted for a typical arrival time of 9am on a weekday.

6.16 From an **outflow** perspective, taking into account that people travel 30 minutes for the purposes of commuting on average, it is possible to assess where people are likely to commute to work by road. This is achieved using GIS tools and considers how far on average people could travel in this time from the main centres of population[123] in Huntingdonshire during an indicative peak time of 08.30am. The radius is broadly similar to that for inflows, although journeys to/from Cambridge are more achievable in the average journey duration.

[123] Given MSOAs have broadly consistent populations sizes, the centroid of each of all MSOAs in Huntingdonshire have been used for the purposes of this analysis to be representative of the settlements across Huntingdonshire. The travel time analysis using 'TravelTime' plug-ins is measured from these points.

Figure 6.6 – In an average commute duration by road, Huntingdonshire's residents can reach Peterborough, Ely, Cambridge and Bedford

Average commute catchment by road (outflow)



Source: TravelTime. Note: this analysis is based on a typical departure time of 8.30am on a weekday.

Transport networks: rail

6.17 The rail network also plays an important role in facilitating commuting to/from places of work. In Huntingdonshire, there are two passenger train stations, as shown in **Table 6.2**. Data from the Office of Road and Rail (ORR) indicates the usage of these stations in terms of the per annum passenger journeys recorded.[124] In Huntingdonshire, 1.1% of usual residents aged 16 years or over in employment, equivalent to 1,000 people, travel by rail to work.[125] The main origin/destination station is London St Pancras International.

[124] Office of Road and Rail, 2024. Estimates of station usage. Table 1410 - Passenger entries and exits and interchanges by station.

[125] Office for National Statistics, 2022. Census 2021.

Table 6.2 – The main origin/destination for commuters using Huntingdonshire's train stations is London St Pancras International

Rail passenger journeys (entries and exits per annum) in Huntingdonshire (2023)

Train station	Passenger journeys (entries and exits per annum)	Main origin or destination station
Huntingdon	1,420,000	London St Pancras International
St Neots	960,000	London St Pancras International

Source: Office of Road and Rail, (2024); Estimates of station usage. Table 1410 - Passenger entries and exits and interchanges by station.

Journey duration

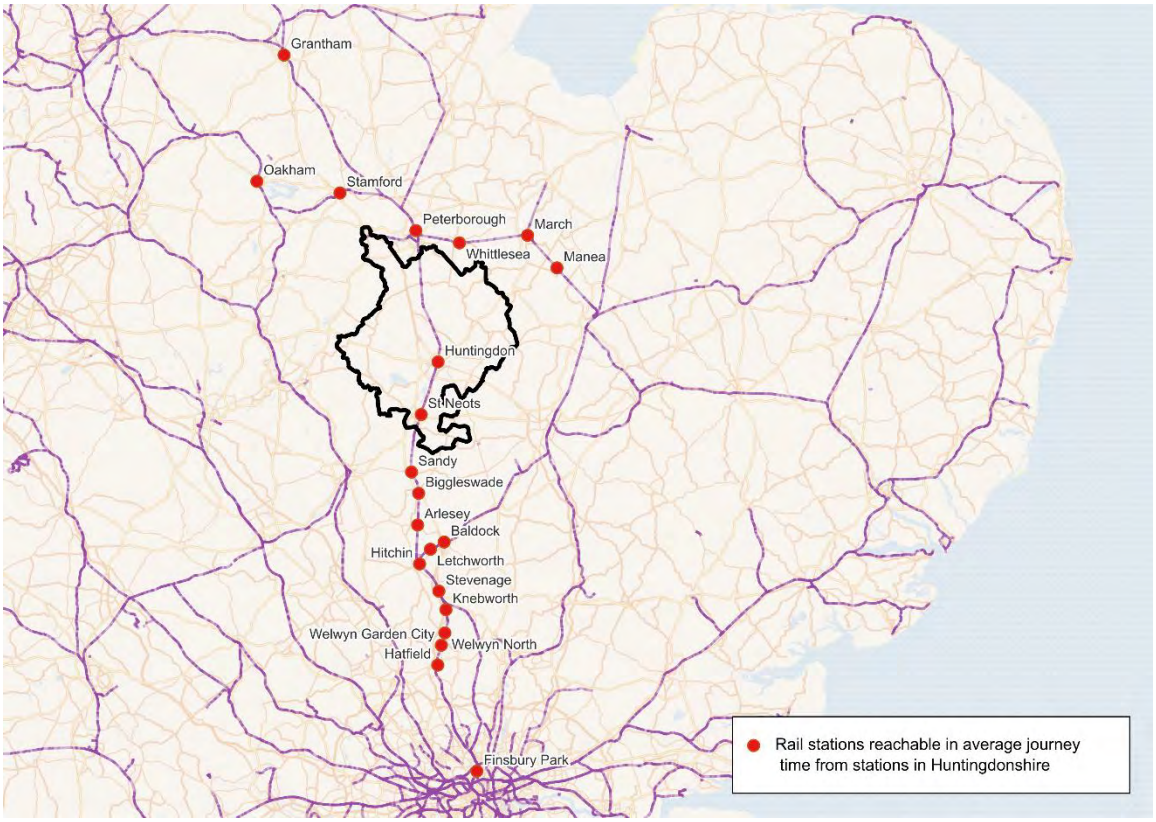
6.18 Department for Transport data for 2023 shows that on average people in the East region using rail (National Rail) travel for 54 minutes to work each day.[126,127] Analysis of the catchment area this produces means that the stations do not produce a contiguous area but are represented graphically to indicate the potential destinations/sources for commuters by rail. A portion of the journey duration by rail (the first and final 'mile') is completed with other modes such as walking, cycling, car or other public transport. The first and final mile is considered to be a 20 minute walking catchment from the source/destination station.

[126] Department for Transport, 2024. Modal comparisons (TSGB01). Table TSGB0111a: Average time taken to travel to work by region of workplace and usual method of travel in Great Britain, 2023.

[127] A portion of this journey duration (the 'first and final mile') is completed with other modes such as walking, cycling, car or other public transport. For simplicity, an allowance for this has been considered to reflect one mile travel distance.

Figure 6.7 – Commuters by rail travelling from Huntingdonshire stations for an average journey duration can reach nine stations

Average commute catchment by rail



Source: Great Northern, 2025. Timetable A: London, Brighton, Horsham, Gatwick Airport and East Croydon to Stevenage, Peterborough, Cambridge, Ely and Kings Lynn. East Midlands Railway, 2025. Regional Train Timetables 06, 02.

Housing

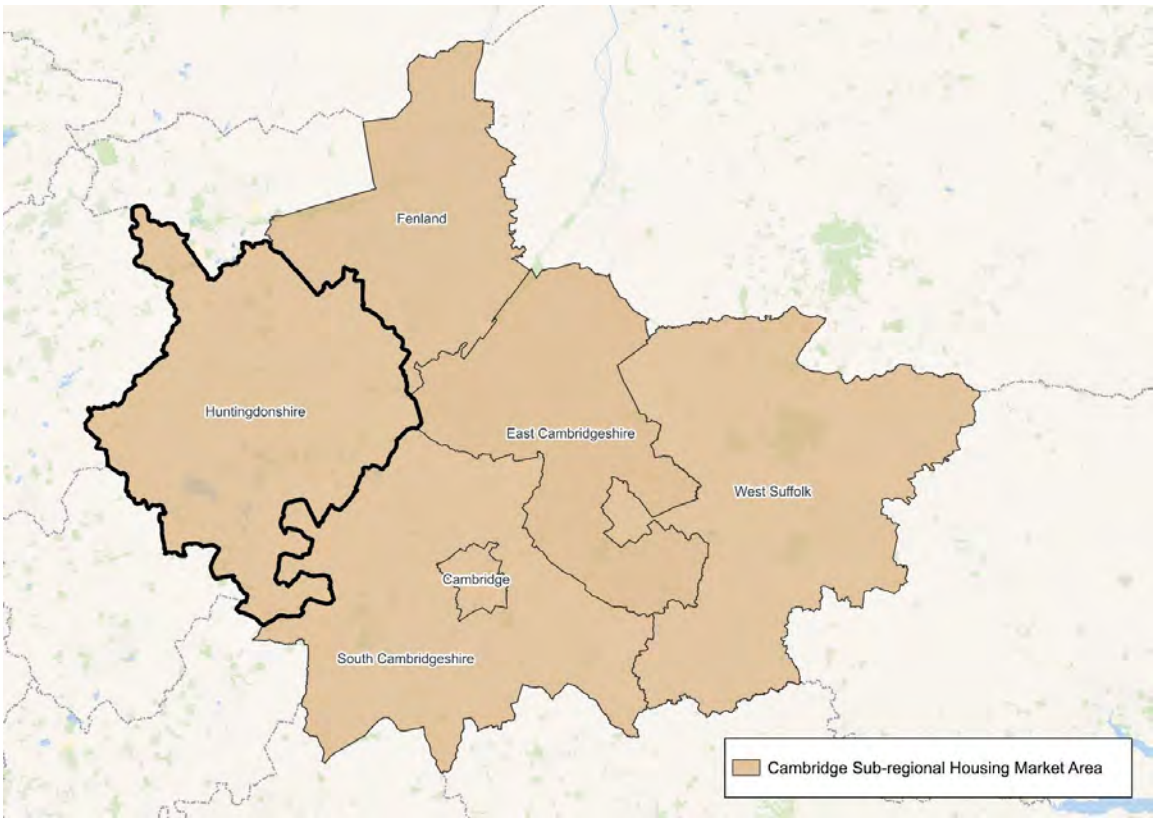
6.19 The relationship between housing markets and FEMAs is a key consideration because they both influence the places people live and work, and therefore economic geographies. Housing markets determine where people can afford to live and therefore what their likely commuting patterns and access to jobs are. Similarly, the demand for housing can influence the commercial property market as businesses make locational decisions in order to access workforce and consumers.

6.20 At the time of preparation of the Housing Needs of Specific Groups assessment in 2021[128], the Cambridge Sub-regional Housing Market Area (HMA) comprised the local authority areas of Huntingdonshire, Cambridge, East Cambridgeshire, Fenland, South Cambridgeshire and West Suffolk. This area is shown in **Figure 6.8** below. The same HMA geography is intended to be retained for the purposes of this Plan.

[128] GL Hearn, 2021. Housing Needs of Specific Groups: Cambridgeshire and West Suffolk.

Figure 6.8 – Huntingdonshire is within the Cambridge Sub-regional Housing Market Area

Cambridge Sub-regional Housing Market Area



Source: GL Hearn, 2021. Housing Needs of Specific Groups: Cambridgeshire and West Suffolk.

Employment

Employment locations

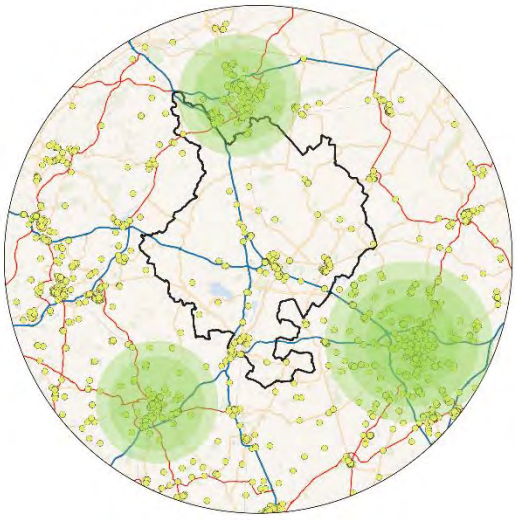
6.21 Clusters can be defined as '*geographic concentrations of interconnected companies and institutions in a particular field*'.[129] They affect competition in three broad ways: increasing the productivity of companies based in an area; driving direction and pace of innovation; and stimulating the formation of new businesses. Clusters of employment space by use type can be identified by assessing density and spatial distribution. Premises identified as being in office, general industrial, and storage and distribution use in the vicinity of Huntingdonshire are mapped in **Figure 6.9**. Broad spatial patterns are identified. For example, the clustering of office premises around Cambridge, and the relative lack of storage and distribution premises in Huntingdonshire in comparison to along the major road corridors highlighted.

[129] Porter, 1998. Clusters and the new economics of competition.

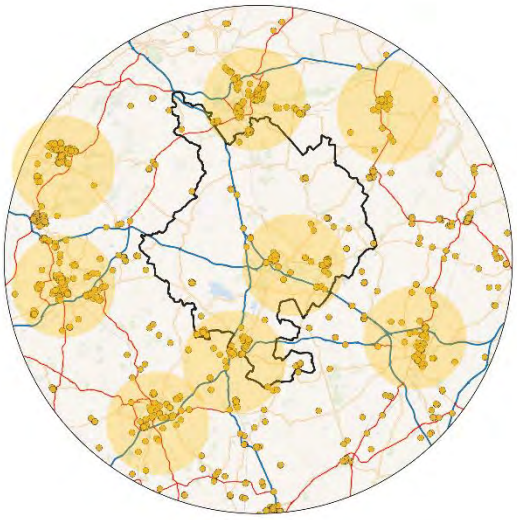
Figure 6.9 – The spatial distribution of employment space varies by use type

Clusters of employment space by use, in proximity to Huntingdonshire

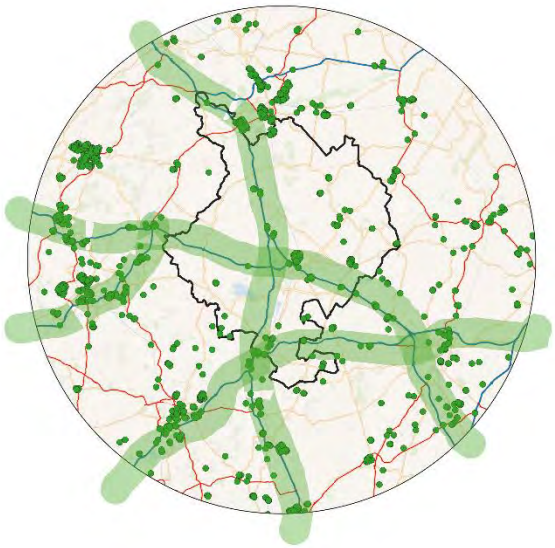
Office



General industrial



Storage and distribution

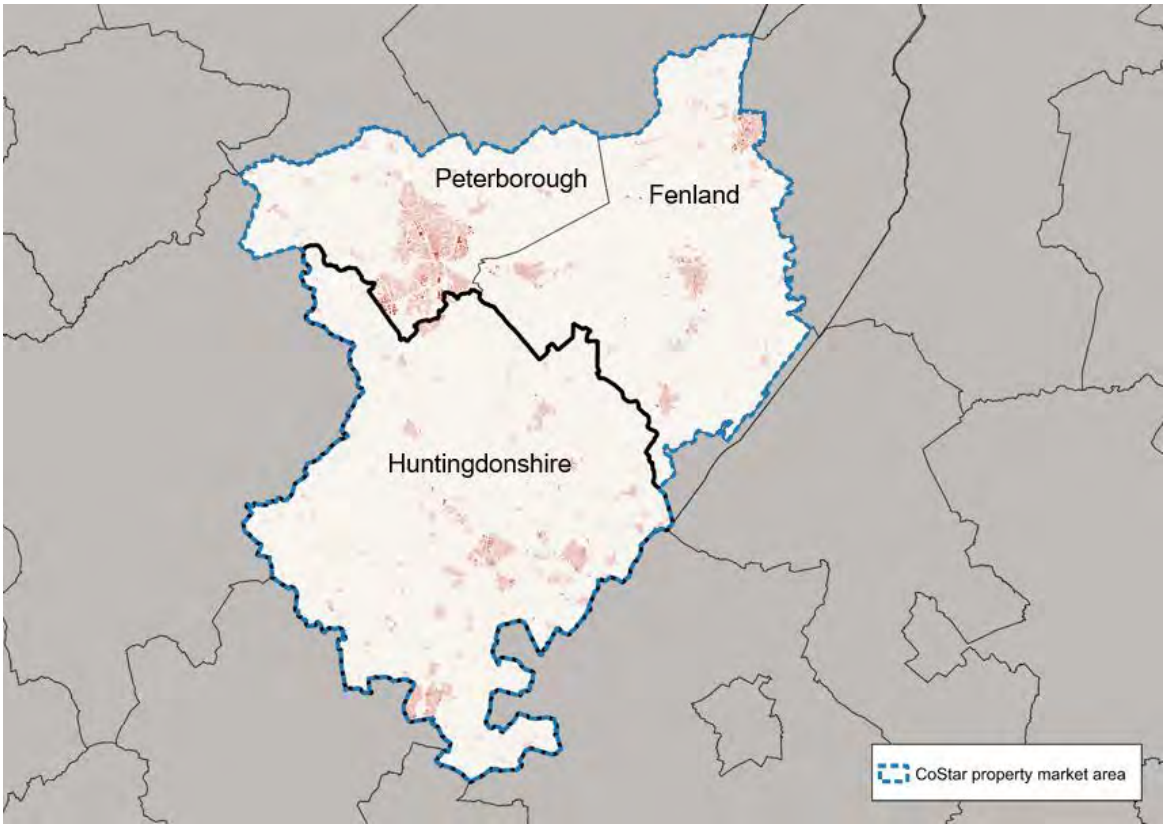


Source: CoStar, 2025.

6.22 CoStar defines distinct commercial property markets across the UK based on a number of indicators of market health such as vacancy rates and rental trends, as well as relative similarities and differences

between (trends in) building stock and construction rates.[130] CoStar considers Huntingdonshire to be part of the Peterborough market, which also includes the city of Peterborough and Fenland district. It is inferred that the market profile more closely resembles these areas than Cambridge, for example, because of a higher availability of development land and more competitive rents.

Figure 6.10 – CoStar commercial property market area



Source: CoStar, 2025.

Spending flows

6.23 The Office for National Statistics provides data on the spending landscape of the UK, detailing where cardholders spend money face-to-face in comparison to their place of residence.[131,132] There are two aspects to this data which in aggregate characterise the consumer spending area of a place: where cardholders resident in an area spend their money, and where customers of merchants within the area

[130] CoStar defines property submarkets as specific, contiguous, and non-overlapping geographic areas within a larger real estate market. Each submarket represents a core area that is competitive with other submarkets and is characterised by similar property types, such as office, industrial, or retail. These divisions are designed to facilitate meaningful comparisons and analyses of commercial real estate data.

[131] Office for National Statistics, 2024. Consumer card spending, flow of spending across the UK: 2019 to 2023.

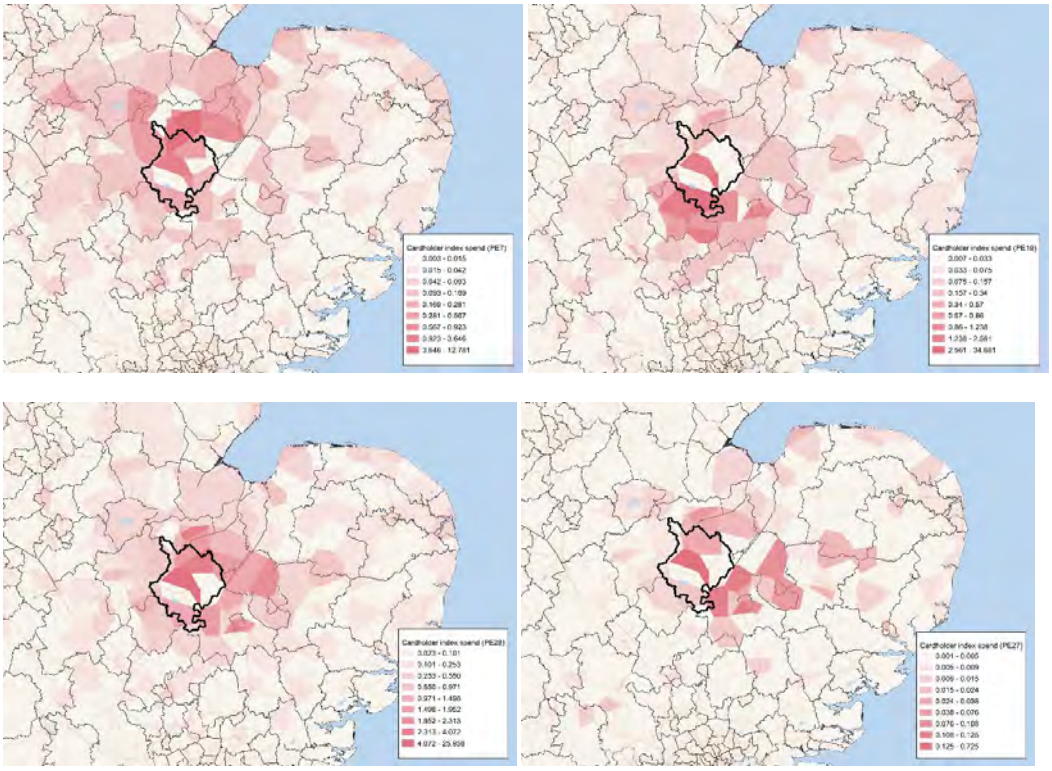
[132] The data is derived from Visa card spending data and is limited to transactions using this provider. A proportion of transactions are completed using cash, which are naturally excluded from this analysis.

come from. This data is organised by postcode district area (i.e. "PE28"). For the purposes of this analysis, postcode areas whose centroid is within the Huntingdonshire boundary are included: PE27, PE28, PE26, PE29, PE19 and PE7.[133]

Cardholders

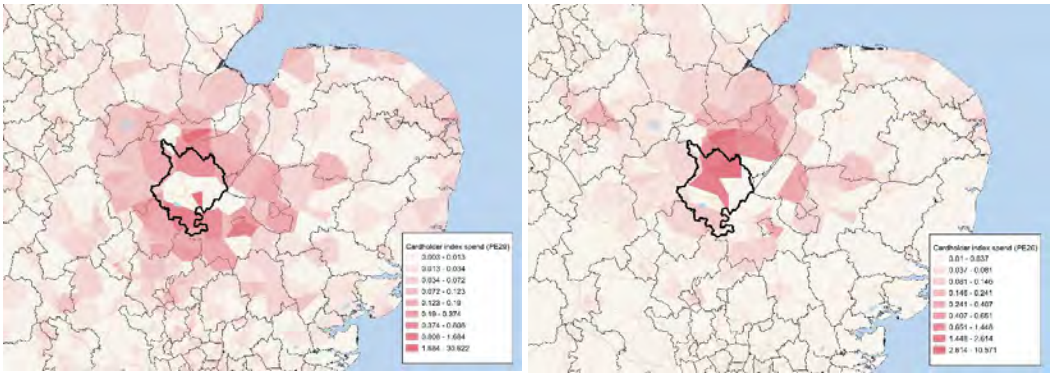
6.24 Cardholder index spend shows the *'proportion of total spend at merchants in the merchant location for cardholders based in the cardholder location*.' [134] This data illustrates face-to-face transactions, not online spending. For each of the postcodes for which data is available, a visualisation of where Huntingdonshire residents spend their money is presented in **Figure 6.11**. When interpreting these figures, it is important to note that they should not be compared with each other given the different scales used. Instead, they should be viewed as indicative of the spatial distribution of spending by cardholders of the respective postcode district areas. In general, cardholder transactions are completed in the postcode of residence. The classifications are therefore adjusted to allow for visualisation of the spatial distribution of the remaining transactions.

Figure 6.11 – Cardholder index spend for cardholder postcode districts in Huntingdonshire (Q3 2023)



[133] The selection of these postcode districts also reflects the availability of data as some postcode district pairings are omitted from the dataset.

[134] Nomis, 2025. Consumer card spending, flow of spending across the UK: 2019 to 2023.

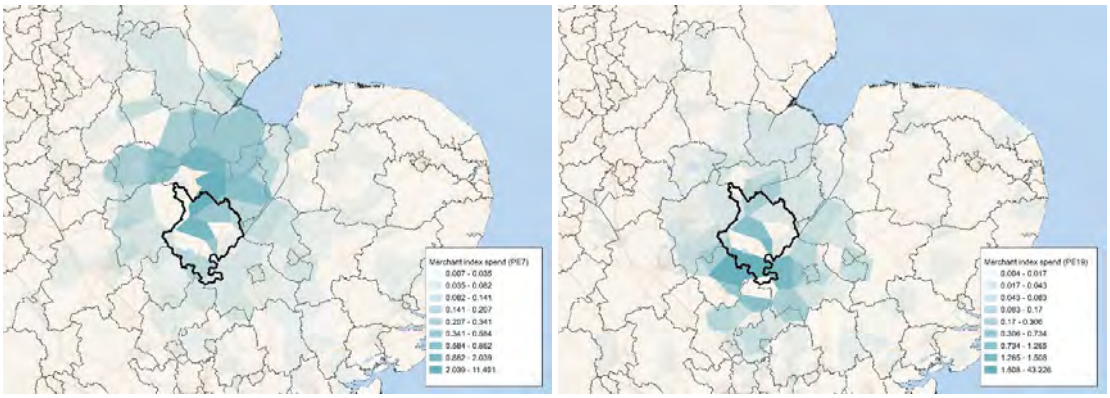


Source: Office for National Statistics, 2024. Consumer card spending, flow of spending across the UK: 2019 to 2023.

Merchants

6.25 Merchant index spend shows the '*proportion of total spend by cardholders based in the cardholder location at merchants based in the merchant location*'.[135,136,137] For each of the postcodes for which data is available, a visualisation of where customers of Huntingdonshire businesses come from is presented in **Figure 6.12**. As above, these figures should be treated as a visual representation of the spatial distribution of where customers come from rather than for direct comparison between the postcode districts.

Figure 6.12 – Merchant index spend for merchant postcode districts in Huntingdonshire (Q3 2023)



[135] Nomis, 2025. Consumer card spending, flow of spending across the UK: 2019 to 2023.

[136] Merchant location refers to the place where either an in person transaction took place or the merchant's principal place of business (e.g. a shop).

[137] Visa, 2024. Visa Merchant Data Standards Manual.

Source: Office for National Statistics, 2024. Consumer card spending, flow of spending across the UK: 2019 to 2023.

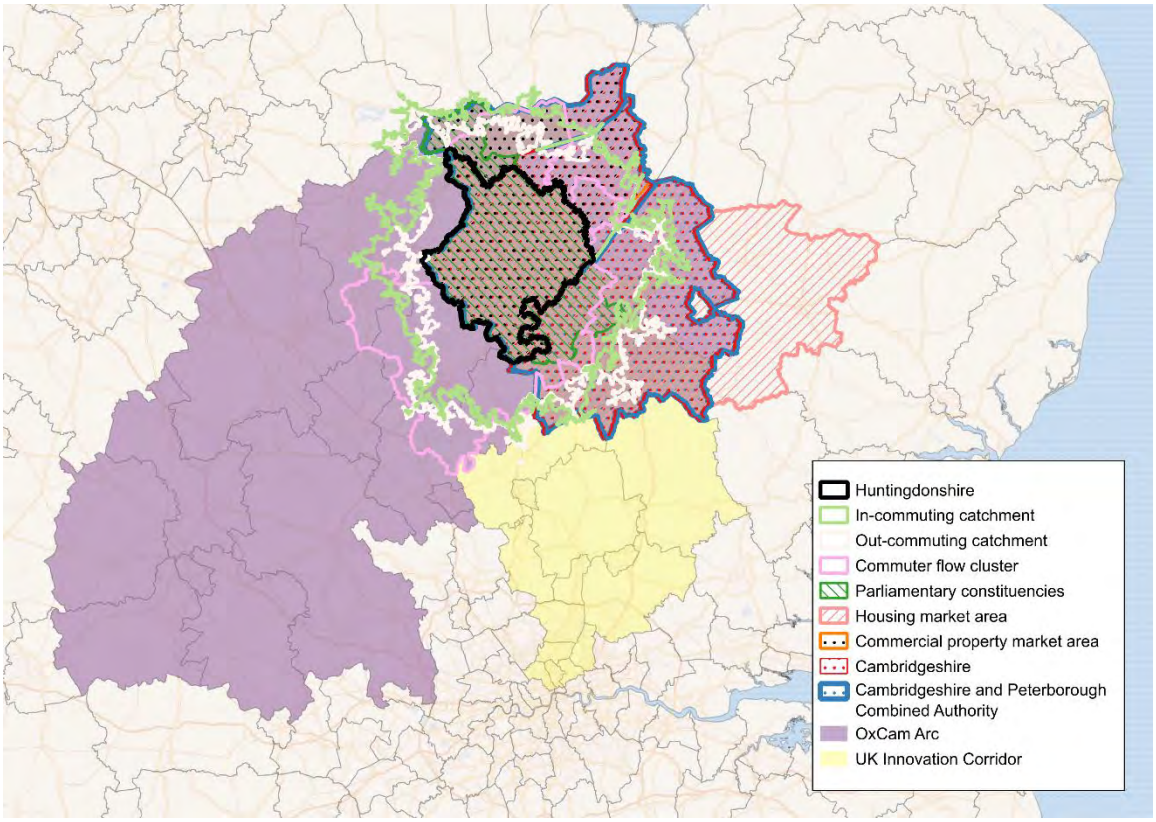
Summary

Synthesis of the FEMA

6.26 Reflecting on the range of indicators analysed above, it is possible to synthesise a contiguous FEMA which incorporates these factors / characteristics. This takes into account the amount of criteria being met, placing slightly greater weight on commuter flows and travel time, and lower weight on pan-regional initiatives.

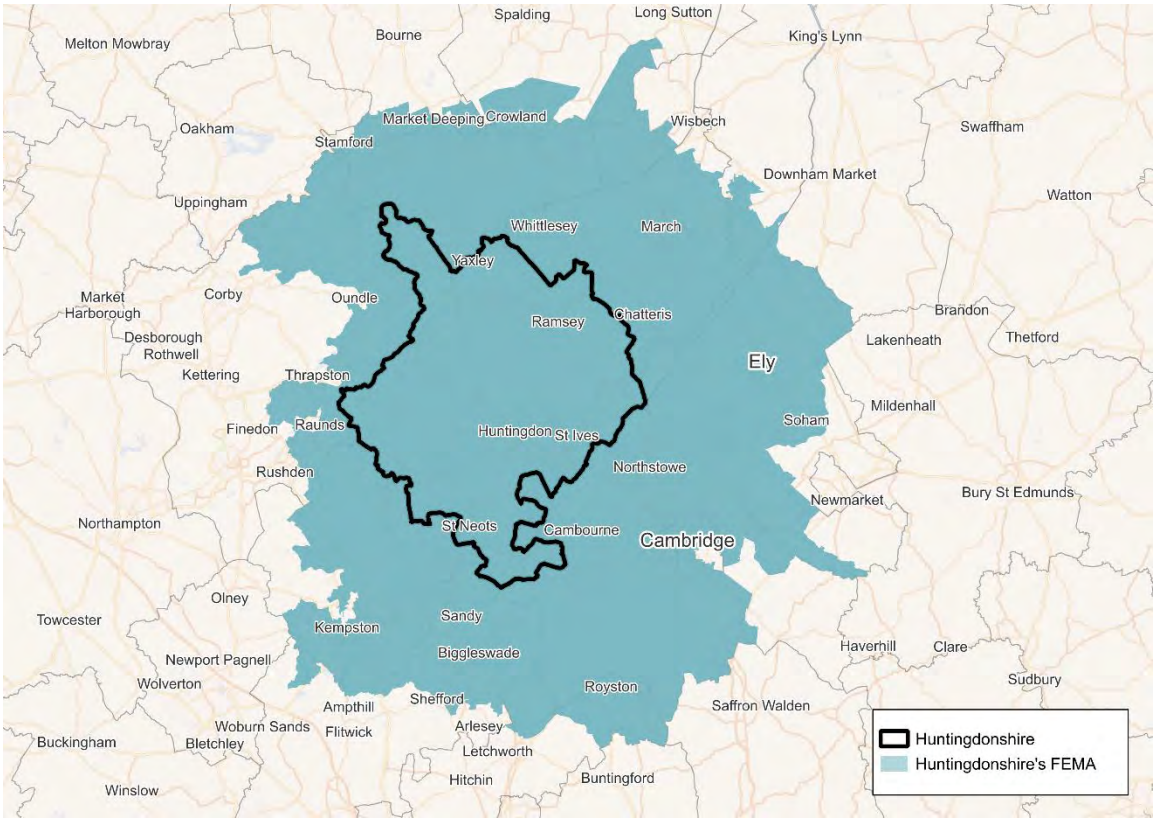
Figure 6.13 – Composite mapping shows Huntingdonshire's economic relationships

Composite map of FEMA analysis components



6.27 The resulting FEMA is shown in **Figure 6.14**. It represents a bespoke area which comprises the Huntingdonshire local authority area, as well as Peterborough, and large swathes of Fenland, East Cambridgeshire, South Cambridgeshire, Cambridge, Bedford, as well as smaller portions of North Northamptonshire, Central Bedfordshire, North Hertfordshire, South Kesteven and South Holland. This area has been derived by considering where key linkages exist based on a review of the above indicators.

Figure 6.14 – Huntingdonshire's FEMA



7. Socio-economic profile

7.1 This section provides a socio-economic profile for Huntingdonshire using key indicators. The analysis informs an understanding of the local economic strengths and weaknesses that may impact employment land and premises requirements. To provide a comparative assessment, Huntingdonshire is benchmarked against data for the CPCA, the East of England, England as a whole, and where data allows, the FEMA. These comparator areas remain consistent throughout this section where data allows.

7.2 This socio-economic profile covers:

- **Labour market characteristics**: the structure and dynamics of the local workforce, including employment patterns, economic activity, occupations, and commuting behaviour; and
- **Local economy characteristics**: the composition and performance of the local economy, including business activity, sectoral structure, productivity, and earnings.

Labour market characteristics

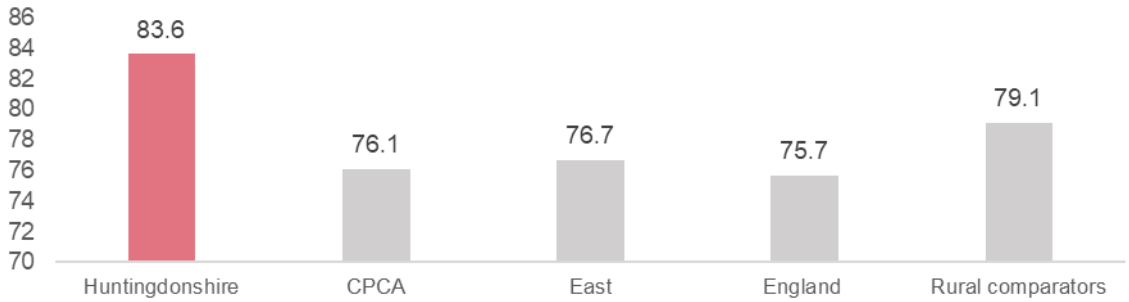
Employment rate

7.3 The employment rate in Huntingdonshire is significantly higher than that recorded across comparator areas. In 2023/24, the employment rate in Huntingdonshire was 83.6%, compared to 76.1% across the CPCA, 76.7% across the East of England, and 75.7% across England.

7.4 As mentioned in **Section 5.13**, a higher employment rate is consistent with areas that rely more heavily on the rural economy. To facilitate comparison with areas whose economies have a similar rural/urban split, Huntingdonshire is also compared to the 'Majority rural' local authorities in the East of England, per the 2021 Census.[138,139] Huntingdonshire performs better on employment rate than these local authorities.

Figure 7.1 The employment rate in Huntingdonshire is significantly higher than recorded across comparator areas

Employment rate across geographies (2023/2024) (%)



[138] Office for National Statistics, 2021. Web map for Rural Urban Classification (RUC) of Local Authority District Areas (LADs), England and Wales, 2021.

[139] Note: These local authorities include: Babergh, Broadland, East Cambridgeshire, Huntingdonshire, King's Lynn and West Norfolk, Maldon, Mid Suffolk, North Norfolk, South Cambridgeshire, South Norfolk, and Uttlesford.

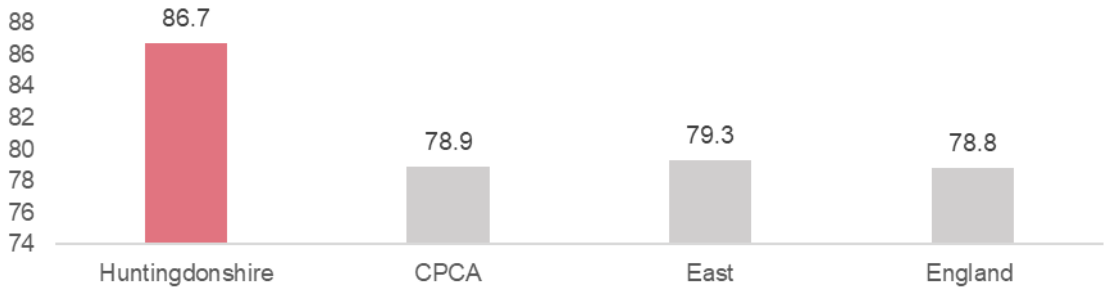
Source: Office for National Statistics, 2025. Annual Population Survey.

Economic activity rate

7.5 Likewise, Huntingdonshire has an economic activity rate that is significantly higher than comparators. The economic activity rate in Huntingdonshire in 2023/24 was 86.7%, compared to 78.9% across the CPCA, 79.3% across the East of England, and 78.8% across England. Higher economic activity rates in conjunction with high employment rates in Huntingdonshire indicate a strong local labour market with high workforce participation and job availability.

Figure 7.2 – The economic activity rate in Huntingdonshire is significantly higher than recorded across comparator areas

Economic activity rate across geographies (2023/2024) (%)



Source: Office for National Statistics, 2025. Annual Population Survey.

Employment

7.6 **Table 7.1** provides a breakdown of employment in Huntingdonshire and comparator areas by broad industrial group. It also provides a breakdown of employment across relevant geographic comparators. In total, employment in Huntingdonshire is approximately 84,000 jobs. This represents 12.5% of employment across the FEMA. Huntingdonshire has a higher proportion of employment in traditional sectors such as agriculture, mining, quarrying and utilities, manufacturing and public administration and defence compared to the FEMA, CPCA, the East of England, and England. These industries make up a significant share of the local economy, highlighting the area's reliance on resource-intensive, production-based sectors. There is a lower proportion in the district of employment in IT, financial and insurance, and professional, scientific and technical employment suggesting a gap in more knowledge-driven and high-value industries.

7.7 This sectoral structure indicates that Huntingdonshire could benefit from greater sector diversification. The low representation of digital, financial, and professional services presents an opportunity for growth in these high-value sectors.

Table 7.1 – Total employment in Huntingdonshire is approximately 84,000, with higher reliance on resource-intensive, production-based sectors and lower representation of knowledge-intensive, high value sectors

Employment by broad industrial group across comparators (2023)

Sector	Huntingdonshire		FEMA		CPCA		East	England
	No.	%	No.	%	No.	%	%	%
Agriculture, forestry and fishing	1,375	2%	900	0%	7,000	1%	1%	1%
Mining, quarrying and utilities	2,125	3%	8,700	1%	5,500	1%	1%	1%
Manufacturing	11,000	13%	58,200	9%	42,500	9%	7%	7%
Construction	4,500	5%	30,200	4%	20,000	4%	6%	5%
Motor trades	2,250	3%	15,900	2%	10,500	2%	2%	2%
Wholesale	4,250	5%	31,800	5%	18,500	4%	4%	4%
Retail	6,000	7%	49,400	7%	34,000	7%	9%	8%
Transport and storage (including postal)	3,500	4%	41,700	6%	24,500	5%	6%	5%
Accommodation and food services	6,000	7%	44,000	7%	30,000	6%	7%	8%
Information and communication	2,750	3%	32,600	5%	26,500	5%	3%	5%
Financial and insurance	900	1%	8,900	1%	7,500	2%	2%	3%
Property	1,625	2%	15,000	2%	9,500	2%	2%	2%
Professional, scientific and technical	6,500	8%	71,900	11%	63,000	13%	9%	10%
Business administration and support services	6,000	7%	48,600	7%	37,000	8%	11%	9%
Public administration and defence	6,000	7%	26,300	4%	15,500	3%	3%	4%
Education	6,500	8%	73,100	11%	57,000	12%	9%	8%
Health	9,500	11%	86,500	13%	61,500	13%	12%	13%
Arts, entertainment, recreation and other services	3,500	4%	31,000	5%	21,000	4%	4%	5%

Sector	Huntingdonshire		FEMA		CPCA		East	England
	No.	%	No.	%	No.	%	%	%
Total	**84,000**	**-**	**674,600**	**-**	**491,000**	**-**	**-**	**-**

Source: Office for National Statistics, 2024. Business Register and Employment Survey 2023.

Note: Shading relative to share of national employment. Green = higher than national share of employment in that sector, amber = same as national share of employment in that sector, red = lower than national share of employment in that sector.

In-commuting patterns

7.8 **Table 7.2** outlines the local authorities where the highest numbers of residents commute from and to work in Huntingdonshire. Peterborough is home to the highest amount of in-commuters to Huntingdonshire by a substantial margin. This is likely a result of the high levels of connectivity provided by the A1 and the fact that there are large employment sites on the border between Huntingdonshire that workers can commute to. The skills profile in Peterborough is also likely to be a closer match to that of Huntingdonshire than is the case with other neighbouring local authorities, such as South Cambridgeshire.

Table 7.2 – Peterborough is home to the highest amount of in-commuters to Huntingdonshire

Local authorities with the highest number of in-commuters to Huntingdonshire (2021)

Rank	Local Authority	Total in-commuters
-	*Huntingdonshire (mainly working from home)*	*43,900*
-	*Huntingdonshire (commuting to work within the boundary)*	*27,900*
1	Peterborough	4,390
2	Fenland	2,140
3	South Cambridgeshire	1,675
4	North Northamptonshire	1,550
5	Bedford	1,495

Source: Office for National Statistics, 2021. Origin-destination data, England and Wales: Census 2021.

Out-commuting patterns

7.9 **Table 7.3** illustrates that a large number of Huntingdonshire residents out-commute to nearby local authorities.

7.10 These commuting patterns show that Huntingdonshire is closely integrated with neighbouring economies, with a near balance of flows to and from Peterborough, but a net outflow of workers to South Cambridgeshire and Cambridge City. While many residents travel outward for higher-value or specialised roles (particularly in Cambridge), the district also attracts workers from nearby areas, indicating it serves as both an employment hub and a residential base for broader regional labour markets.

7.11 It is notable that there is a low amount of commuting from Huntingdonshire to London boroughs. A total of 895 residents commute from Huntingdonshire for work. The lack of commuters from Huntingdonshire to London could be a result of poor transport connectivity within the district.

Table 7.3 – A large number of Huntingdonshire residents out-commute to nearby local authorities

Local authorities with the highest number of out-commuters to Huntingdonshire (2021)

Rank	Local Authority	Total out-commuters
-	*Huntingdonshire (mainly working from home)*	*43,900*
-	*Huntingdonshire (commuting to work within the boundary)*	*27,900*
1	Peterborough	3,850
2	South Cambridgeshire	3,475
3	Cambridge	3,345
4	Bedford	2,045
= 5	Central Bedfordshire	895
= 5	London (all boroughs)	895

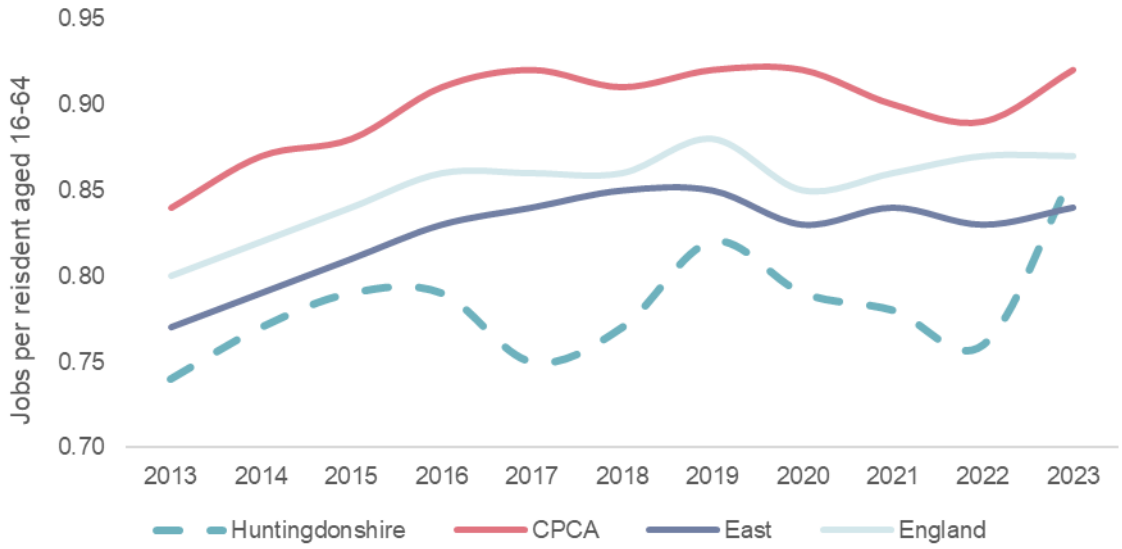
Source: Office for National Statistics, 2021. Origin-destination data, England and Wales: Census 2021.

Jobs density

7.12 **Figure 7.3** presents the jobs density across comparator areas from 2013 to 2023. Jobs density is defined as the total number of filled jobs in an area divided by the resident population of working age in that area. Huntingdonshire has been consistently lagging behind comparator areas in jobs density since 2013, despite a recent upturn in 2023. This suggests that the number of job opportunities per resident is lower in Huntingdonshire, relative to comparator areas. Notably, the CPCA performs considerably above both regional and national averages on this metric. Given the presence of major urban centres such as Cambridge and Peterborough within the CPCA geography, it is perhaps unsurprising that Huntingdonshire performs below these comparators, reflecting its role as a net exporter of workers to other areas within the CPCA.

Figure 7.3 – Huntingdonshire is lagging behind comparators in regards to jobs density

Jobs density across comparators (2023) (jobs per resident aged 16-64)



Source: Office for National Statistics, 2023. Jobs density.

Occupation profile

7.13 **Table 7.4** provides a full occupation breakdown for Huntingdonshire and geographical comparators. Huntingdonshire's workforce has a higher proportion of managers, directors, and senior officials (14%) compared to the FEMA (13%), the CPCA (13%) and England (13%) averages, indicating a relatively stronger presence of leadership roles. However, professional occupations are slightly underrepresented at 20%, compared to 23% across the FEMA and 24% in the CPCA, suggesting potential opportunities for growth in this area. Additionally, the proportion of elementary occupations in Huntingdonshire (8%) is lower than the FEMA (10%), the CPCA (11%) and national averages (10%), reflecting a relatively stronger presence in higher-skilled roles.

Table 7.4 – Huntingdonshire's occupational profile is typical for the region although there is a smaller proportion of professional occupations when compared to the combined authority area

Occupation profile (2021)

Sector	Huntingdonshire		FEMA		CPCA		East	England
	No.	%	No.	%	No.	%	%	%
Managers, directors and senior officials	13,200	14%	69,100	13%	55,000	13%	14%	13%
Professional occupations	18,400	20%	119,400	23%	105,100	24%	20%	20%

Sector	Huntingdonshire		FEMA		CPCA		East	England
	No.	%	No.	%	No.	%	%	%
Associate professional and technical occupations	13,500	15%	69,700	13%	55,800	13%	13%	13%
Administrative and secretarial occupations	9,400	10%	47,200	9%	37,900	9%	10%	9%
Skilled trades occupations	9,100	10%	50,100	10%	39,900	9%	11%	10%
Caring, leisure and other service occupations	7,500	8%	44,300	8%	36,500	8%	9%	9%
Sales and customer service occupations	6,100	7%	34,700	7%	28,300	6%	7%	7%
Process, plant and machine operatives	6,400	7%	37,000	7%	32,500	7%	7%	7%
Elementary occupations	7,700	8%	54,600	10%	46,100	11%	10%	10%

Source: Office for National Statistics, 2022. Census 2021.

Skills

7.14 The skills attainment of a population is indicative of the accessibility of employment. Huntingdonshire has a lower proportion of the population that is educated to NVQ 4 level (first year of an undergraduate university degree) or above (33%) in comparison to the FEMA (36%). However, Huntingdonshire does have a slightly lower proportion of the population that have no qualifications (16%) than most of the geographic comparators (16% – 18%).

Table 7.5 – Broadly, Huntingdonshire performs on par with comparator areas for skills outcomes

Highest level of qualification across geographical comparators (2021)

	No qualifications	NVQ 4 or above	Apprenticeship
Huntingdonshire	16%	33%	6%
FEMA	16%	36%	5%
CPCA	17%	37%	5%
East	18%	32%	6%
England	18%	34%	5%

Source: Office for National Statistics, 2022. Census 2021.

Local economy characteristics

Business demographics

Business births

7.15 **Table 7.6** illustrates the total new enterprise births and the number of enterprise births per 10,000 jobs across geographic comparators. In 2023, 735 new enterprises were formed in Huntingdonshire. Whilst enterprise births per 10,000 jobs in Huntingdonshire was higher than the rate recorded across the CPCA, it was lower than rates recorded regionally and nationally.

Table 7.6 – Around 735 new enterprises were formed in Huntingdonshire in 2023

Count of births of new enterprises (2023)

Area	Enterprise births (2023)	Enterprise births per 10,000 jobs
Huntingdonshire	735	87
CPCA	3,900	80
East	30,400	102
England	282,000	100

Source: Office for National Statistics, 2024. Business demographics.

Business survival rates

7.16 A high 5-year business survival rate is indicative of a strong entrepreneurial spirit and a supportive environmental for businesses. The 5-year business survival rate in Huntingdonshire (41.1%) is higher than what is recorded regionally (40.4%) and nationally (39.4%). The 5-year business survival rate across the CPCA was slightly higher (41.5%).

Table 7.7 – Huntingdonshire is home to a supportive environment for businesses

5-year business survival rate across geographic comparators (based in 2018)

Area	5-Year business survival rate
Huntingdonshire	41.1%
CPCA	41.5%
East	40.4%
England	39.4%

Source: Office for National Statistics, 2024. Business demographics

Location quotient analysis

7.17 Location Quotient (LQ) analysis for sectors is a tool used to measure the concentration of a particular industry or sector in a specific geographic area relative to a larger reference area (such as a region or national level). It helps identify whether a sector is over-represented or under-represented in the local economy compared to the broader economy.

7.18 The LQ is calculated by comparing the share of a sector's employment in the study area to its share of employment in the reference area. If the LQ is:

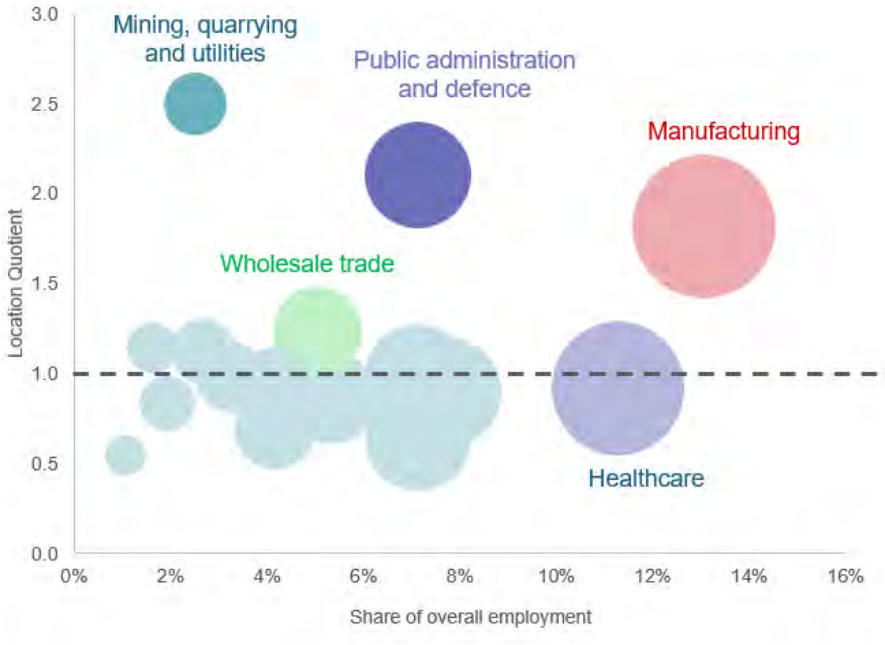
- Greater than 1: The sector is more concentrated in the study area than in the reference area (indicating a local specialisation or competitive advantage).
- Equal to 1: The sector has a similar concentration in the study area as in the reference area.
- Less than 1: The sector is less concentrated in the study area, suggesting it is under-represented compared to the reference area.

Traditional sectoral analysis

7.19 Traditional sectoral analysis reveals a familiar story. When looking at sectoral definitions by Standard Industrial Classification (SIC) codes, Huntingdonshire's traditional economic sectoral strengths are reflected (relative to the East of England). These include key traditional sectors, such as: mining, quarrying and utilities, public administration and defence, and manufacturing.

Figure 7.4 – Huntingdonshire's strengths in mining, quarrying and utilities, public administration and defence, and manufacturing set its economy apart from the East of England

Huntingdonshire SIC LQ analysis (relative to the East of England) (2023)



Source: Office for National Statistics, 2023. Business Register and Employment Survey; Volterra analysis.

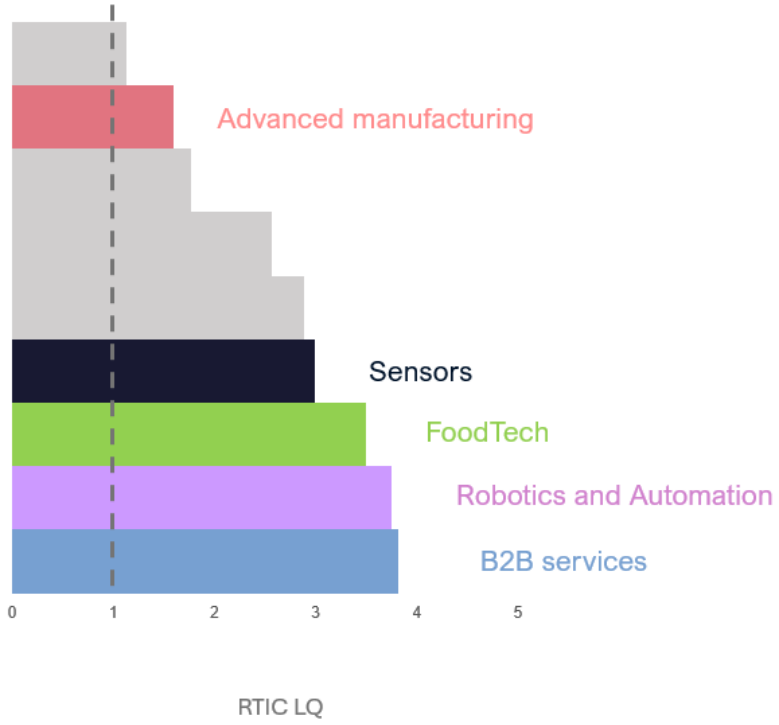
Real-Time Industry Classifications analysis

7.20 Sectoral analysis using Real-Time Industrial Classifications (RTICs) can reveal deeper insights into Huntingdonshire's economy. RTICs are a modern classification approach, unlike the traditional SIC system that relies on predetermined and static categories. They are based on how companies describe themselves on their websites.

7.21 Analysis using RTICs, which can more accurately capture emerging industrial activities, identifies that Huntingdonshire has particular strengths relative to the national average in advanced manufacturing, sensors, FoodTech, robotics and automation, and business to business (B2B) services. These are key emerging sectors which are set to grow in the future.

Figure 7.5 – Huntingdonshire already has strengths in some key emerging industries

Huntingdonshire RTIC LQ analysis (relative to the national area) (2025)



Source: Data City, 2025. Copyright in the data belongs to Data City and/or its licensors. Available at web address: www.thedatacity.com

7.22 **Table 7.8** illustrates the overall amount of employment in Huntingdonshire for the RTIC sectors that the local authority performs strongly in. The table also shows the proportion of overall employment in Huntingdonshire in comparison to the overall share of national employment that the RTIC makes up. It is notable that a significant proportion of Huntingdonshire's overall employment is in FoodTech and Advanced Manufacturing, relative to the national proportion.

Table 7.8 There is a significant share of Huntingdonshire's overall employment in FoodTech and Advanced Manufacturing

Huntingdonshire overall employment and share of overall employment by RTIC, share of national employment in select RTIC (2023 overall employment figures)

RTIC sector	Huntingdonshire employment	Share of Huntingdonshire employment	Share of national employment
B2B Services	90	0.1%	0.0%
Robotics and Autonomous systems	600	0.7%	0.3%
FoodTech	820	1.0%	0.4%
Sensors	385	0.5%	0.2%
Computer Hardware	235	0.3%	0.1%
Software Development	490	0.6%	0.3%
Electronics Manufacturing	795	0.9%	0.5%
Advanced Manufacturing	825	1.0%	0.8%
Quantum Economy	225	0.3%	0.1%

Source: Data City, 2025. Copyright in the data belongs to Data City and/or its licensors. Available at web address: www.thedatacity.com

Table 7.9 – 'Data City' definitions of relevant RTICs

RTIC	Definition
B2B services	Business-to-Business (B2B) refers to companies that provide products or services to other businesses, distinguishing them from Business-to-Consumer (B2C) companies, which serve individual customers. These include providers of lead generation expertise and market research capabilities, helping businesses identify opportunities, connect with clients, and make data-driven decisions.
Robotics and Automation	Robotics and Autonomous Systems (RAS) sector encompasses companies that specialise in developing and implementing robotic and autonomous technologies across a variety of industries. Companies in this sector focus on creating, deploying, and maintaining robotic systems that perform tasks autonomously or with minimal human intervention.
FoodTech	Food Technology (or FoodTech) is an emerging sector made up of a combination of companies, organisations and projects that use technology – such as AI & machine learning, precision farming and automation – to help design, choose, produce and deliver food.

RTIC	Definition
	Often the Food Technology sector is associated with the use of technology to drive efficiency and sustainability, particularly within the agricultural and AgriTech industries.
Sensors	Sensors are a critical component of modern life, enabling us to measure, track and monitor data for a wide range of applications. Sensors are increasingly being used in various industries, due to the wide range of advantages they provide. For instance, they are used in automotive industries to monitor vehicle performance, in medical applications to track vital signs, and in manufacturing processes to monitor machinery and production lines.
Advanced Manufacturing	Advanced Manufacturing is the term used to describe innovation within the manufacturing industry. Advanced Manufacturing within the UK can be used to classify companies that use innovative technologies and processes to increase production and productivity. Typically, what's different between traditional and advanced manufacturing is the use of versatile production methods that drive efficiency. This includes companies leveraging automation, robotics, artificial intelligence, software, augmented reality (AR) and virtual reality (VR), digital design and other cutting-edge processes that add value in the manufacturing process.

Source: Data City, 2025. Copyright in the data belongs to Data City and/or its licensors. Available at web address: www.thedatacity.com

Earnings

7.23 The difference between workplace-based and resident-based pay indicates the degree to which commuters are likely to travel to alternative locations to access higher wages, and vice versa the attractiveness of taking up roles in the district. Given the resident-based pay is higher in Huntingdonshire, it is more likely that residents would commute elsewhere to access higher-paid jobs. As outlined in **Table 7.10**, in 2024 both resident and workplace pay in Huntingdonshire is lower than what is recorded across comparator study areas.

Table 7.10 – Those that both work and live in Huntingdonshire are paid less relative to those that work and live in comparator areas

Workplace and resident pay across study areas (2024)

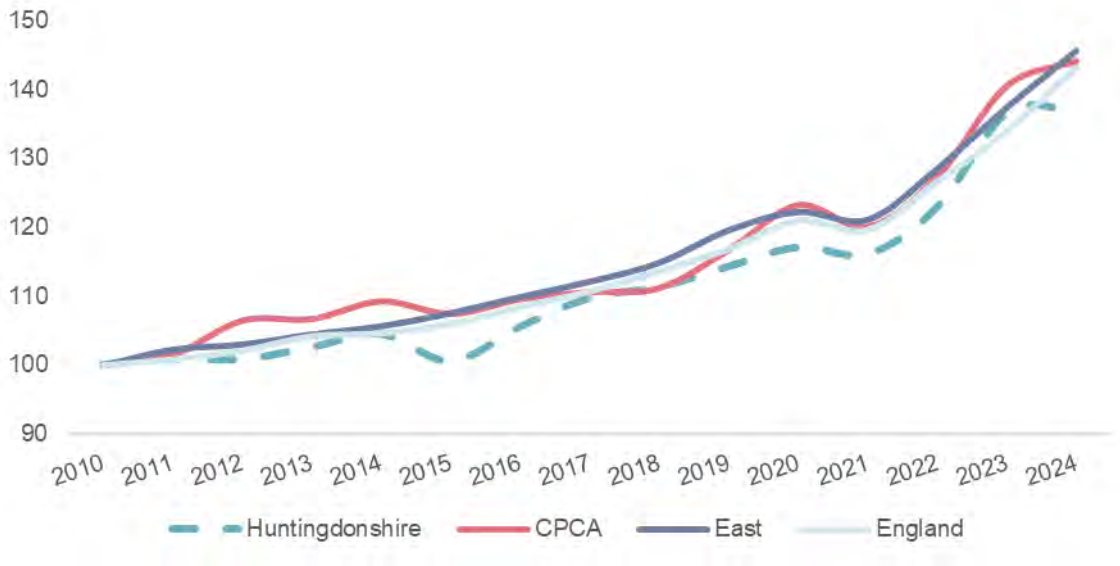
Area	Workplace pay	Resident pay
Huntingdonshire	£35,500	£37,100
CPCA	£37,300	£39,000
East	£36,900	£39,100
England	£37,600	£37,600
Rural comparators	£35,500	£37,900

Source: Office for National Statistics, 2024. Annual Survey of Hours and Earnings.

7.24 Whilst workplace-based pay has grown significantly in Huntingdonshire since 2010, it has grown at a slower rate than has been experienced across comparator geographies (see **Figure 7.6).**

Figure 7.6 – Growth in workplace-based pay in Huntingdonshire has consistently struggled to keep pace with comparators

Index growth in workplace-based pay across comparator areas (2010 – 2024) (2010 = 100)



Source: Office for National Statistics, 2024. Annual Survey of Hours and Earnings.

Gross value added

7.25 Data on gross value added (GVA) is only available at the Cambridgeshire County Council (CCC) level. This area includes the local authorities of Huntingdonshire, Fenland, East Cambridgeshire, Cambridge City, and South Cambridgeshire. For the purposes of assessing the productivity characteristics of Huntingdonshire individually all data relation to GVA should therefore be treated with caution.

7.26 CCC demonstrates strong economic performance in high-value sectors, particularly financial and insurance services, where GVA per worker is 148% of the regional average and 123% of the national average. The county also outperforms in public administration and defence, as well as education, with GVA per worker exceeding both regional and national averages. However, CCC underperforms in the property and transport sectors, with GVA per worker in both industries significantly below the regional and national levels.

Table 7.11 – CCC performance in GVA per worker provided a mixed picture

GVA per worker by industry across CCC relative to the East of England and England (2022)

Sector	Cambridgeshire CC	East	CCC relative to East	England	CCC relative to England
Agriculture, forestry and fishing, mining, quarrying	£45,800	£31,800	144%	£25,000	183%
Manufacturing	£90,800	£92,700	98%	£85,600	106%
Construction	£87,000	£83,400	104%	£87,400	100%
Motor trades	£38,700	£54,100	72%	£51,800	75%
Wholesale	£71,000	£77,300	92%	£77,700	91%
Retail	£41,500	£42,700	97%	£41,000	101%
Transport and storage (including postal)	£35,900	£49,100	73%	£48,800	74%
Accommodation and food services	£22,400	£25,400	88%	£27,700	81%
Information and communication	£75,000	£82,600	91%	£104,400	72%
Financial and insurance	£242,500	£164,200	148%	£196,400	123%
Property	£80,000	£113,000	71%	£127,600	63%
Professional, scientific and technical	£66,800	£60,900	110%	£63,900	105%
Business administration and support services	£39,800	£35,200	113%	£40,400	99%
Public administration and defence	£82,800	£80,500	103%	£79,000	105%
Education	£54,400	£46,500	117%	£49,900	109%
Health	£45,700	£39,600	115%	£40,000	114%
Arts, entertainment, recreation and other services	£14,000	£18,800	74%	£22,400	63%

Source: Office for National Statistics, 2024. Business Register and Employment Survey; ONS, 2024. Regional gross value added (balanced) by industry: all ITL regions.

8. Property market assessment

8.1 This section of the report provides an assessment of the property market in Huntingdonshire. The assessment covers key metrics relating to the stock of commercial property in the area and makes comparisons where illuminating to geographies including the FEMA, East region, and England. Indicators which are used to characterise the property market include: quantum of stock, building age and condition, vacancy rates and leasing activity.[140] Trends in these indicators over time are presented, noting the importance of considering the behaviour of the market over time so it is understood in the context of broader longitudinal trends, and how macroeconomic events might/could impact on the health of the property market.

8.2 The information presented is derived from:

- CoStar data (considered to be the most comprehensive repository of commercial property market data); and
- Engagement with property market agents and planners who are operating in the local area (who have provided additional insight into prospective occupier intentions and confirmed/advised on the overarching trends identified above).[141]

8.3 The EENA scopes in office [E(g)(i)], research and development ('R&D') [E(g)(ii)], light industrial [E(g)(iii)], general industrial [B2], and storage and distribution [B8] space to the assessment. To align with the available repository of property market data provided by CoStar, building use type information utilised by the service is mapped onto the scoped in uses.[142] The mapping of Use Classes to building use type information is shown in **Table 8.1**.

Table 8.1 – Scoped in Use Classes are mapped against CoStar building use types

EENA type	Use Class	CoStar primary type	CoStar secondary type
Office	E(g)(i)	Office	• All
Research and development	E(g)(ii)	Light industrial	• R&D
Light industrial	E(g)(iii)	Light industrial	• Light distribution • Light manufacturing • Showroom (light industrial)
General industrial	B2	Industrial	• Food processing • Manufacturing • Service

[140] Note that throughout data presented pertains to those premises for which information on the relevant indicator is available.

[141] Volterra has conducted engagement with Newlands, Eddisons, Savills, Iceni Projects, Quod, Bletsoes, Endurance Estates, Tim Ashwin Consulting, DTRE, Hallam Land, and Boyer Planning among others.

[142] CoStar identifies the main use of properties within its database of commercial property information. It is recognised that there may be some variation within these definitions.

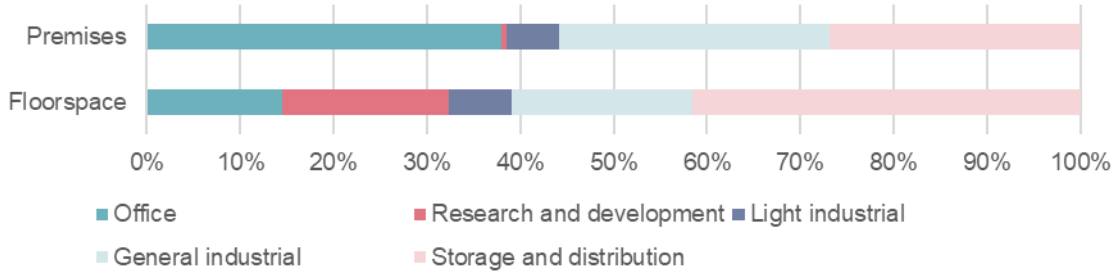
EENA type	Use Class	CoStar primary type	CoStar secondary type
Storage and distribution	B8	Industrial	• Distribution • Warehouse • Refrigeration/Cold Storage • Truck terminal • Showroom (industrial)

Headline findings

8.4 The stock of employment floorspace in Huntingdonshire is dominated by industrial use types across general industrial and storage and distribution activities. These account for over 60% of the use of floorspace, reflecting the space intensity of industrial activities. When considering the breakdown of stock on a premises basis, the uses are more varied noting a more equal split between Use Type E and B premises.

Figure 8.1 – Huntingdonshire's floorspace is dominated by industrial use

Breakdown of premises and floorspace in Huntingdonshire by use type (%)

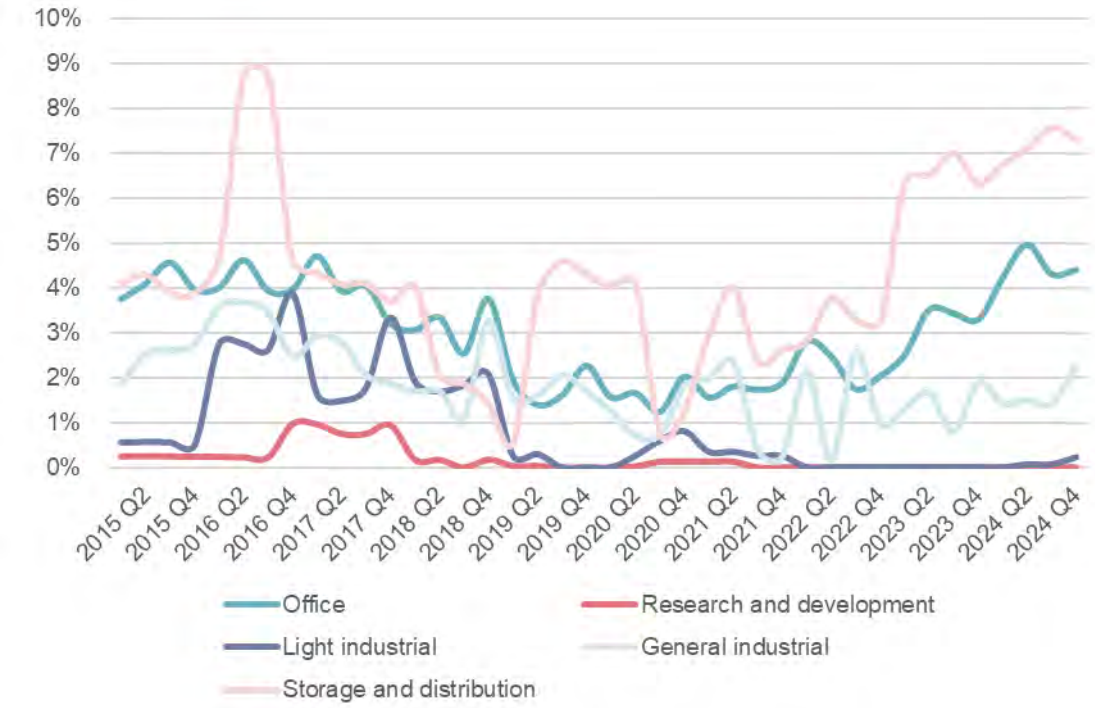


Source: CoStar, 2025.

8.5 The vacancy rate for storage and distribution floorspace in Huntingdonshire is at the highest level since 2016. Since 2020, when demand for logistics space was notoriously high reflected in a near zero vacancy rate, the vacancy rate has steadily increased, although on closer inspection this trend is driven by a limited number of large premises. This is a trend that is mirrored in office space whose vacancy rate has also gradually increased since 2020, albeit from a very low baseline. The vacancy rate for all other space has remained consistently low, and there is little to no vacant light industrial or research and development space.

Figure 8.2 – Vacancy rates of office and storage and distribution space has tended to increase since 2020 whereas other industrial uses have recorded very little vacant space over the same period

Vacancy rate in Huntingdonshire by use type (%)



Source: CoStar, 2025.

8.6 Overall, there is around 1.9 million square metres (m^2) of employment floorspace in Huntingdonshire, of which 77,000m^2 is vacant. The stock which represents the baseline for the employment and economic needs assessment is presented in **Table 8.2**.

Table 8.2 – There is 1.9 million m^2 of employment-generating floorspace in Huntingdonshire

Headline findings relating to employment-generating floorspace in Huntingdonshire (Q4 2024)

Type	Number of premises	Total floorspace (m^2)	Average premises size (m^2)	Vacant floorspace (m^2)	Vacancy rate (%)
Office	336	271,000	810	11,950	4.4%
Research and development	4	333,000	83,000	0	0%
Light industrial	51	126,000	2,500	287	0.3%
General industrial	255	353,000	1,400	8,150	2.3%

Type	Number of premises	Total floorspace (m^2)	Average premises size (m^2)	Vacant floorspace (m^2)	Vacancy rate (%)
Storage and distribution	239	775,000	3,200	56,250	7.3%
Total	890	1,900,000	2,100	77,000	4.1%

Source: CoStar, 2025. Note: figures may not sum due to rounding.

Office [E(g)(i)]

Stock of buildings and floorspace

8.7 In total, there are 336 office premises in Huntingdonshire, amounting to over **270,000m²** of floorspace. Broadly, the office buildings tend to be clustered in and around the four main market towns, with smaller premises in town centre locations and larger premises found in business park settings. Large clusters of office space can be seen in Huntingdon and St Neots, with much smaller clusters in St Ives and Ramsey, the smaller of the market towns. Huntingdonshire's office space amounts to around 11% of the total amount of office space in the FEMA.

Figure 8.3 – Huntingdonshire's office premises are primarily located within and around Huntingdon, St Neots and St Ives

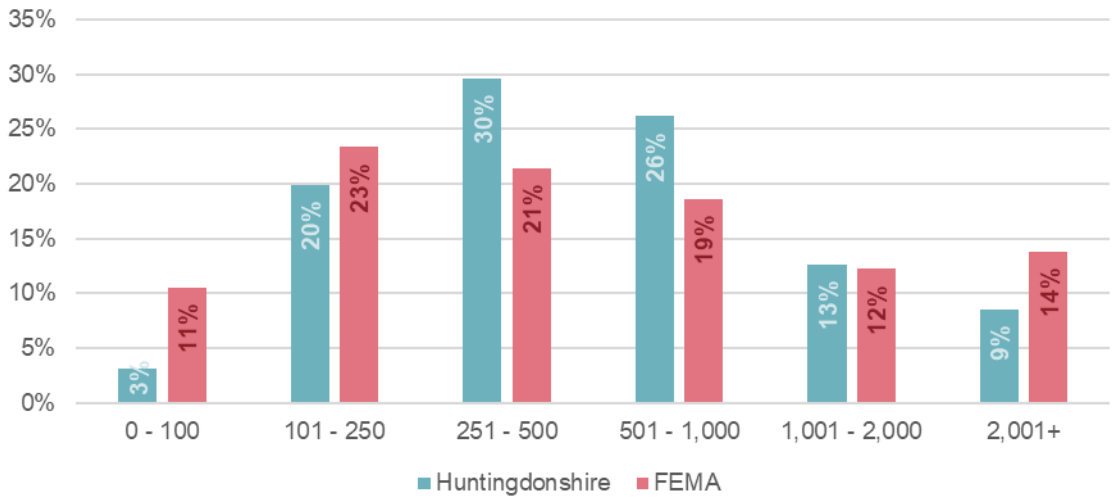
Spotlight on office premises in town centres

Source: CoStar, 2025. Volterra mapping.

8.8 In terms of office size, the largest concentration is in the 250 – 500 m² range, followed closely by the 500 – 1,000 m² category. Smaller offices under 250 m² are also well represented, while larger buildings over 1,000 m² are less common. Huntingdonshire's office market is dominated by modestly-sized spaces and there is a known lack of headquarters scale spaces. The average premises size is **810m²**. Agents indicate that there is demand for larger office premises but very few opportunities for businesses to relocate to the district because of limited options in this regard. Naturally, a variety of floorplate sizes is conducive to attracting a range of occupiers (in terms of business size) as well as provide adaptability and move-on space as occupier demands change.

Figure 8.4 – Most office buildings in Huntingdonshire are small-to-medium sized

Office premises by size (m²)



Source: CoStar, 2025. Note the breakdown of premises reflects those premises for which floorspace information is available.

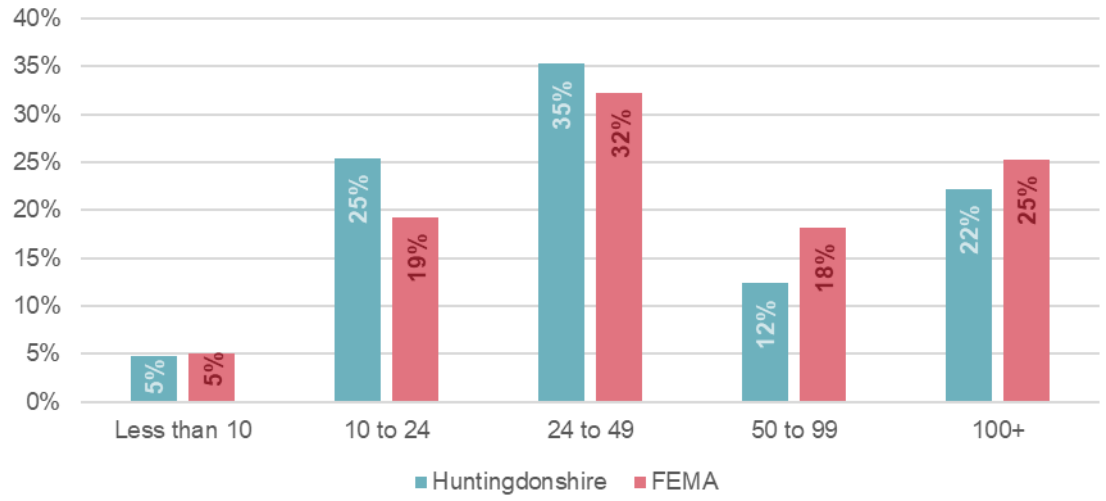
Age/quality of stock

8.9 The average age of office buildings in Huntingdonshire is around **70 years** and nearly a quarter of the office premises in the district were built over 100 years ago, suggesting that there is a notable use of historic buildings for employment use, particularly in town centres. The use of older buildings is not necessarily a disbenefit if the buildings are in good condition, with evidence to suggest that they can be at least if not more productive than newer buildings, especially listed buildings.[143] Landlords may need to adapt or retrofit buildings to improve energy efficiency, but this can be effectively achieved through works to windows, insulation, ventilation and heat recovery, as well as through renewables technology.[144]

8.10 A large share (41%) of office properties however were built or most recently renovated between 1975 and 2000, with very few being built in the last decade; only 12 (4.3%) were built in the last ten years. Most of the newest office stock is located at Alconbury Weald.[145]

Figure 8.5 – Only a very small proportion of office premises in Huntingdonshire are brand new

Office premises by age (years)



Source: CoStar, 2025. Note the number of premises reflects those premises for which age information is available.

Vacancy

8.11 Generally, Huntingdonshire's office market has been characterised over the decade to 2024 by lower vacancy rates compared to the FEMA, the East of England (East) region and England as a whole. The vacancy rate is currently around **4%**.However, since 2020, office vacancy in the district has been rising, potentially reflecting changes in demand due to broader post-pandemic shifts in working patterns, including the increase in homeworking and occupiers 'right-sizing' their office space requirements.

[143] Historic England, 2018. A Perspective on Agile Working in Historic Buildings.

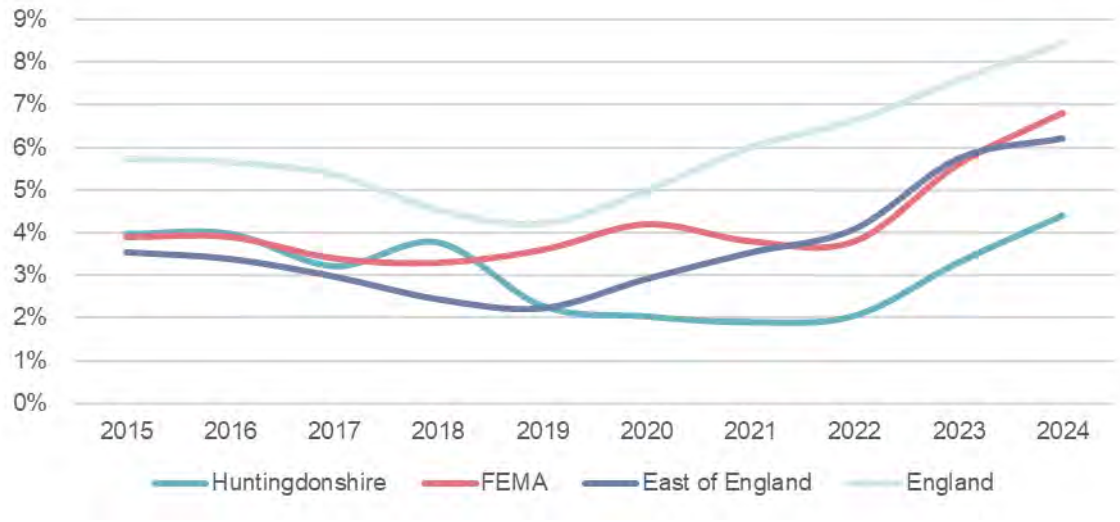
[144] Historic England, 2024. Adapting Historic Buildings for Energy and Carbon Efficiency: Historic England Advice Note 18 (HEAN 18).

[145] CoStar, 2025.

8.12 While rising vacancy could indicate weakening demand, vacancy nonetheless remains fairly low. This is illuminated by the concept of frictional vacancy which describes the level of vacancy required for a healthy, functioning office market. Agents typically consider that an optimal frictional vacancy rate for office properties falls between 5 to 8%.[146] This level allows for tenant mobility and business expansion whereas vacancy rates below this threshold, as was the case in Huntingdonshire pre-2024, could indicate that there was a shortage of available space, which could have restricted business growth. Engagement with local agents and business representatives has confirmed that a lack of suitable space in the district (across all sizes) is a limitation on attracting new businesses to the area, as well as allowing for scaling-up of existing businesses.

Figure 8.6 – There is a low vacancy rate for office floorspace in Huntingdonshire compared to regional and national rates

Office vacancy rate, 2015 to 2024 (%)



Source: CoStar, 2025.

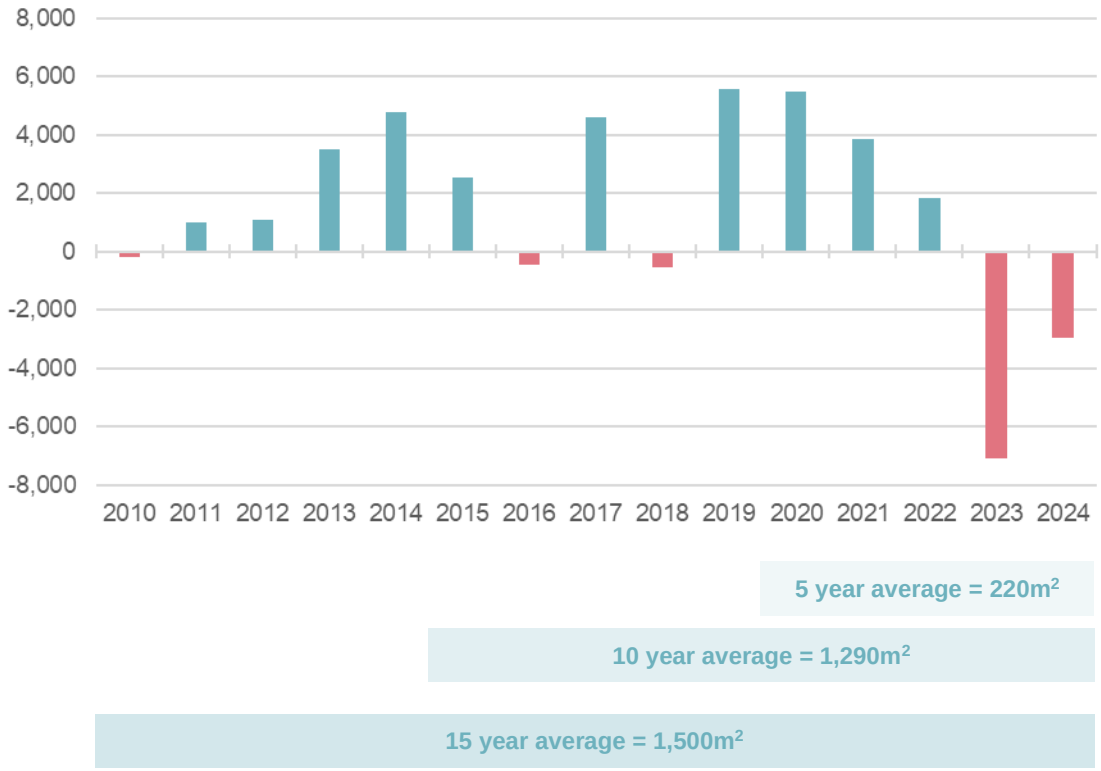
8.13 Net absorption is a key measure that indicates the total change in occupied office space over a given period. It is the difference between the amount of office space leased (or newly occupied) and the amount vacated. Positive net absorption suggests that more space is being taken up than is being vacated, typically signalling strong demand and a growing office market. Conversely, negative net absorption means that more space is being vacated than leased, often reflecting weaker demand and rising vacancy rates.

8.14 The average net absorption has been decreasing on average over time, and in 2023 and 2024 was negative. Over the decade preceding 2024 (the most recent full year for which data is available), average net absorption was **1,500m²**. This reflects approximately 0.5% of total stock being taken up in an average year.

[146] Knight Frank, 2023. UK Logistics Real Estate: The Year Ahead

Figure 8.7 – Net absorption of office floorspace has been negative in recent years

Office net absorption, 2015 Q1 to 2024 Q4 (m^2)



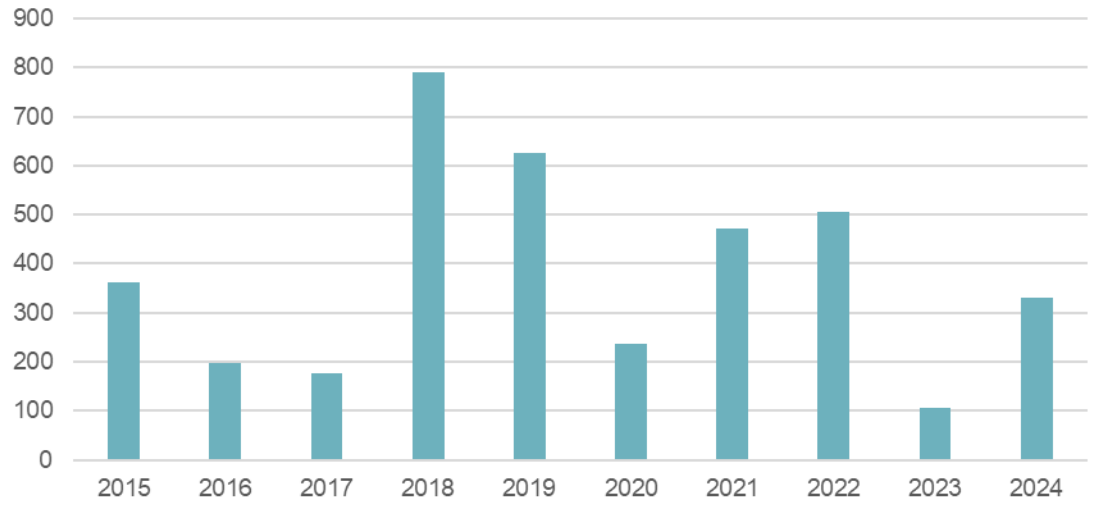
Source: CoStar, 2025.

Leasing

8.15 The average premises size within leasing events of the decade to 2024 has marginally decreased, potentially suggested slightly higher demand for smaller premises since the pandemic. This may also reflect lower availability of larger premises given as anchor tenants stay for longer in larger units.

Figure 8.8 – Average size of leasing events marginally reduced over the decade to 2024

Average size of leasing event, 2015 to 2024 (m^2)

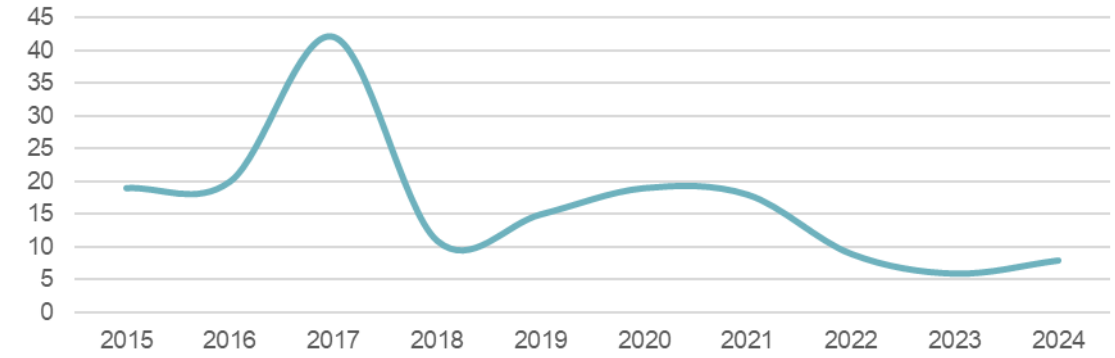


Source: CoStar, 2025.

8.16 Over the last ten years, leasing events for office properties have generally become less frequent. In 2015/2016, around 20 leasing events were happening annually, with the exception of a sharp increase to 42 in 2017). This sudden increase may reflect a sudden increase in office availability in the district (as confirmed by HDC business completions data[147]) – it interestingly coincides with a year during which average size of leasing events remained small, suggesting many smaller units came onto the market. Since then, leasing events have reduced, fluctuating between 5 and 20 per annum, with even fewer in recent years.

Figure 8.9 – Leasing events have remained low since 2018

Leasing events per annum, 2015 to 2024

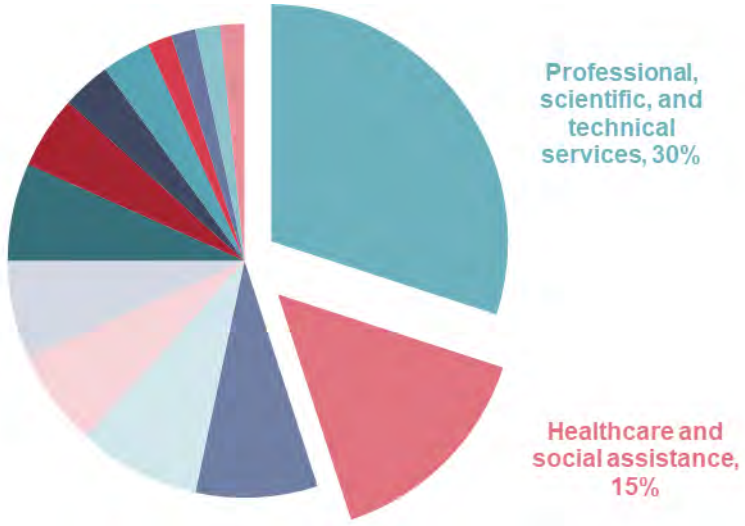


[147] HDC, 2024. Huntingdonshire Business Completions and Commitments 2023/24.

Source: CoStar, 2025.

8.17 By far the most common sector leasing office spaces since 2015 was professional, scientific, and technical services (18), reflecting the high demand for office space in these industries generally. The healthcare and social assistance sector followed with 9 lease events, reflecting a steady demand for office space to support medical and community services. By contrast, sectors like construction, educational services, utilities, and wholesaling each recorded only one lease event, indicating limited office space needs in these industries.[148]

Figure 8.10 – Of the lease events for which tenant data is available, professional, scientific and technical services firms dominate the office leasing market



Source: CoStar, 2025.

Research and development [E(g)(ii)]

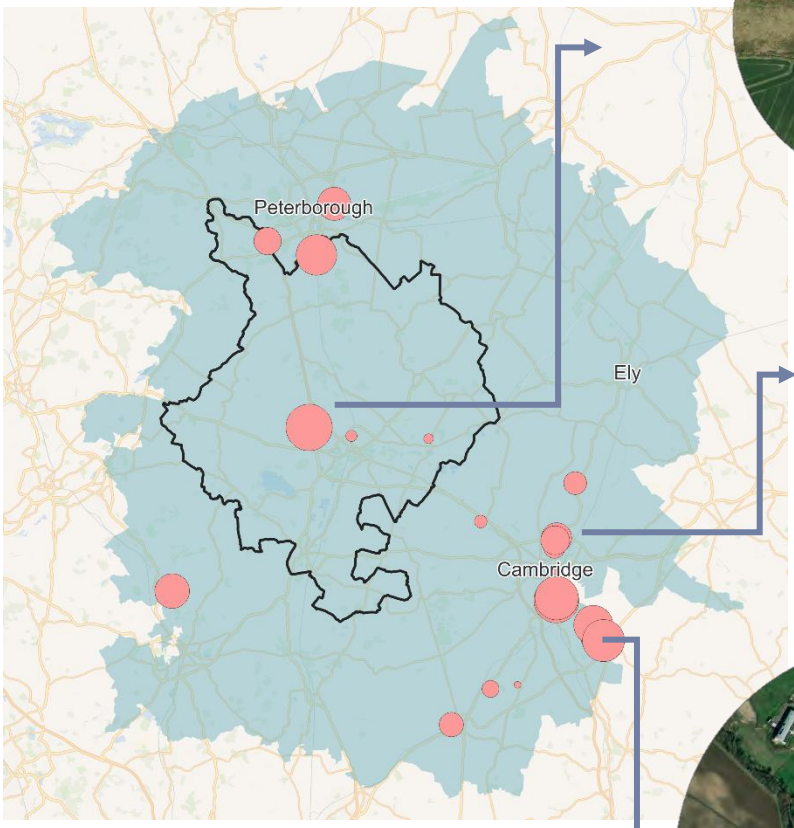
8.18 As noted previously, research premises for the purposes of the assessment have been defined as those properties which have been categorised as such by CoStar. It is recognised that research and development activities may take place in a range of settings. These properties have been identified because R&D is considered to be their primary use.

8.19 In total, there are four premises in Huntingdonshire which have been attributed primarily to research and development use, which together contribute a total of **333,000m^2** of floorspace.

[148] This low recorded number of leasing events attributed to each sector may be interpreted as a limitation of CoStar's data coverage.

Figure 8.11 – The research and development premises in Huntingdonshire are located between clusters of activities in Peterborough and Cambridge

Research and development premises in Huntingdonshire's FEMA



Woolley Road

Cambridge Science Park

Babraham Research Campus

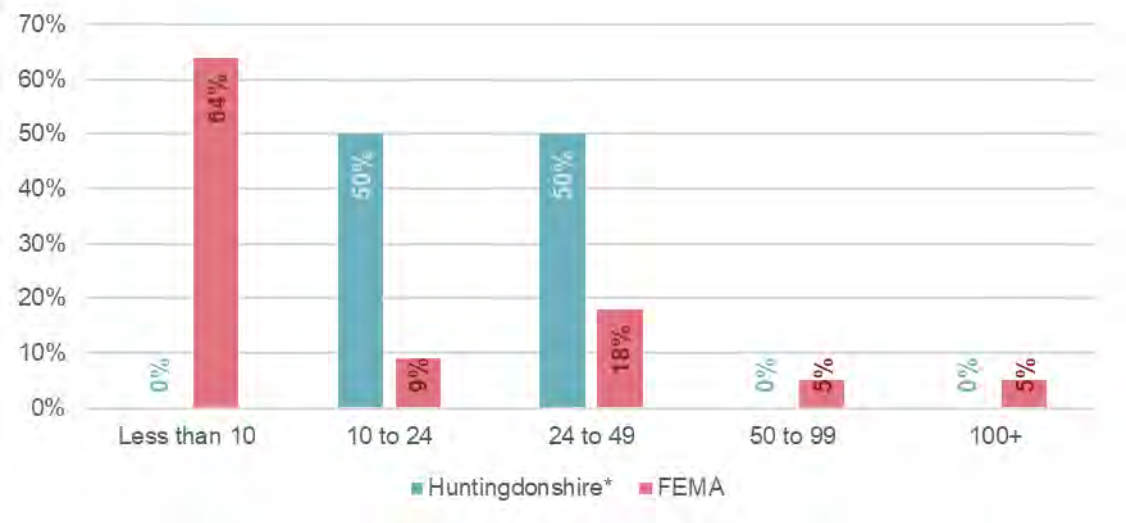
Source: CoStar, 2025.

Age/quality of stock

8.20 The average age of research and development premises in Huntingdonshire is around **24 years**, although this is likely skewed by the lack of information pertaining to 50% of the properties, and 97% of the floorspace. For reference in the FEMA, most of the research and development premises have come forward over the ten years preceding 2024. The requirement for high-specification and bespoke premises attuned to innovative activities requires that new R&D space is developed.

Figure 8.12 – Most of the R&D premises across the FEMA have come forward in the last 10 years, although Huntingdonshire's stock is possibly much older

Research and development premises by age (years)



Source: CoStar, 2025.

** The average age of premises is derived from a limited sample size.*

Vacancy

8.21 There is **no vacant** research and development space in Huntingdonshire, which is reflective of the high demand across wider geographies for these types of spaces (0.3% vacancy in the FEMA, and 1.8% vacancy in the East of England region).

Light industrial [E(g)(iii)]

Stock of buildings and floorspace

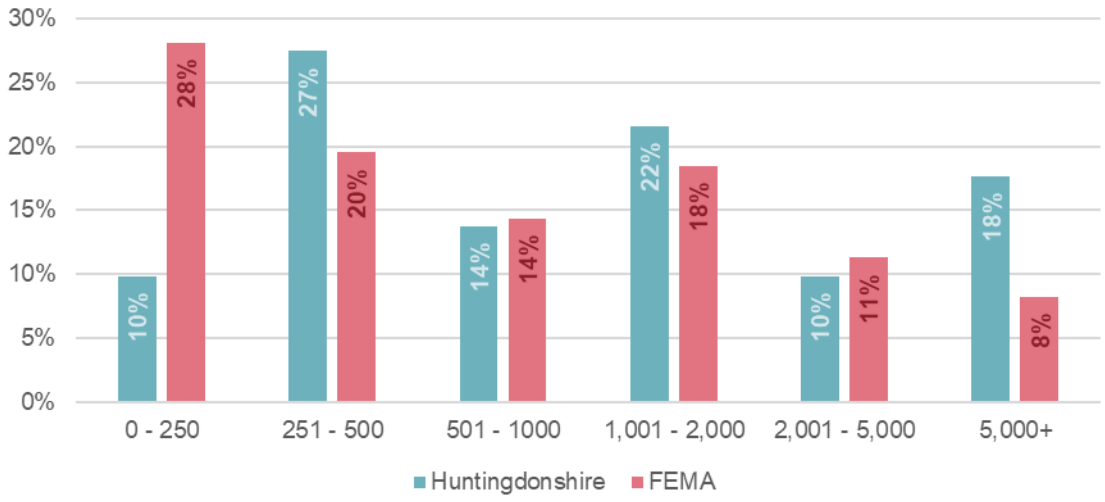
8.22 In total, there are 51 light industrial premises located across Huntingdonshire, totalling **126,000m²** of floorspace. This reflects approximately 28% of the light industrial stock in the FEMA. In comparison to office buildings, Huntingdonshire's light industrial units are much more tightly clustered around fewer locations. In particular, the central location of Huntingdon is home to a high proportion of light industrial floorspace in comparison to other areas in the district. This includes the largest light industrial unit in the district, The Avenue (totalling nearly 15,000m^2), located just south east of the town. St Ives and St Neots also host some of these premises, where many of these units are located on the edges of the town centres. This spatial clustering reflects the nature of light industrial businesses, which often serve local needs whilst being compatible, by definition, of being co-located with residential uses.

8.23 Overall, Huntingdonshire's supply of light industrial units are well distributed across size categories, indicating a degree of variation in specific business uses within the local stock, catering to a broad range of operational and spatial needs. While very few are of the smallest type (250m^2 or smaller), the modal category is **250m² to 500m²**. The FEMA more broadly is characterised by smaller light industrial units, with

the smallest category reflecting a much higher proportion of premises (28%) than in Huntingdonshire (10%). A higher proportion of premises in Huntingdonshire are very large.

Figure 8.12 – The stock of light industrial units is mostly evenly distributed by size, although a smaller proportion of stock is of the smallest size range than is typical for the wider FEMA

Light industrial premises by size (m^2)



Source: CoStar, 2025.

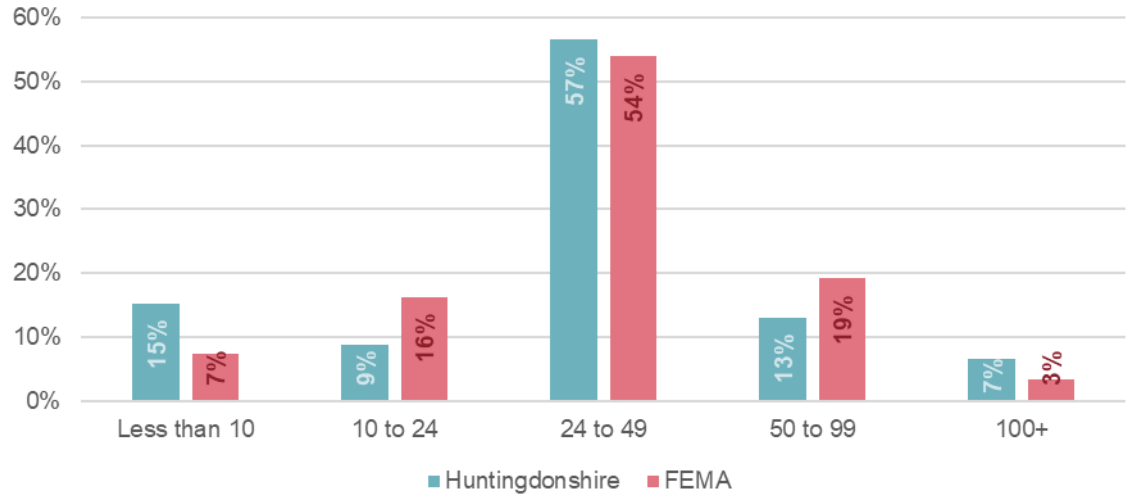
Age/quality of stock

8.24 Generally, the stock of light industrial in Huntingdonshire is newer than offices, with an average age of **42 years**. However, the vast majority of these were built over the single period 1975 to 2000, suggesting a building boom during these years that has not been matched in subsequent decades. Just 7% of light industrial buildings are over 100 years old, suggesting limited historic conversions. The overall trend points to an ageing stock with minimal recent additions, which may have implications for the suitability and modernity of light industrial premises in the district. Overall, newer premises are found in Huntingdon and towards Yaxley, while older premises are located in the south of St Ives and to the east of the district. The average CoStar quality rating for light industrial premises is 2.5 out of 5, which corresponds to a functional overall quality.[149]

[149] A CoStar quality rating of 2 is defined as having no glazing or skylights, average or functional aesthetics, no apparent access strategy, with difficult access and sub-optimal signage, purely functional structure/systems, minimal or no landscaping or exterior spaces, and being unlikely a certified green efficient building.

Figure 8.13 – Huntingdonshire has a low proportion of newer light industrial premises which is mirrored in poor average quality rating, the trend in age of light industrial stock in Huntingdonshire is similar to the trend across the wider FEMA

Light industrial premises by age (years)



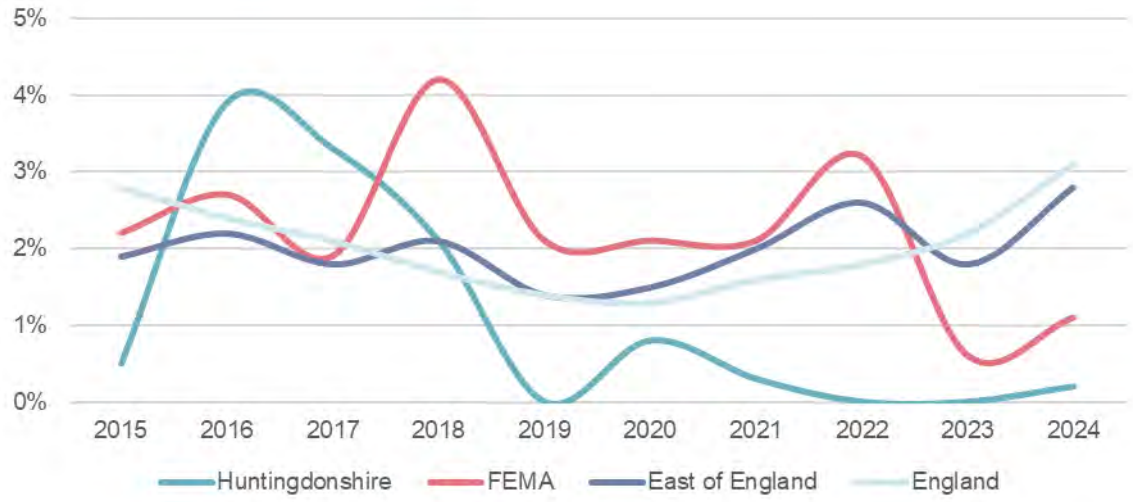
Source: CoStar, 2025.

Vacancy

8.25 There is currently very little to no vacant light industrial floorspace in Huntingdonshire which reflects such a condition that has been recorded since 2019. This suggests that the demand for these units outstrips supply, potentially causing a problem for local businesses who require these spaces. Taken together with the age of premises as displayed earlier, the main cause for this shortfall could be lack of recent supply, with only 11 premises in total built in the last 25 years. The vacancy rates are lower than both national and regional averages.

Figure 8.13 – Vacancy rates for light industrial floorspace in Huntingdonshire remain at a consistently low level

Light industrial vacancy rate, 2015 to 2024 (%)

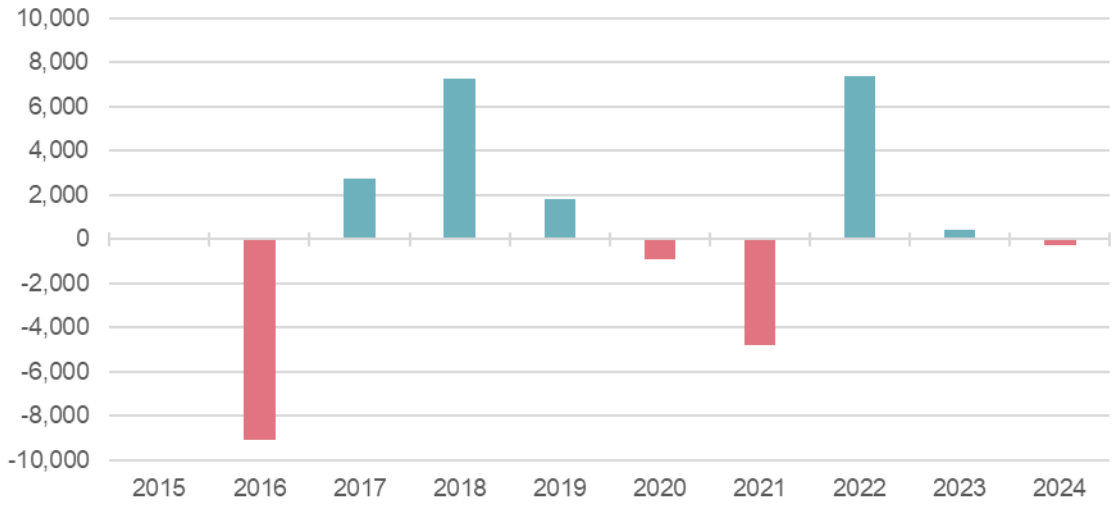


Source: CoStar, (2025).

8.26 Net absorption of light industrial space in Huntingdonshire has fluctuated over the past decade, aligning with vacancy trends. From 2015 to 2019, absorption levels remained relatively stable, with periods of both positive and negative absorption suggesting a balanced market. Between 2020 and 2021, net absorption was low but remained mostly positive, indicating steady if modest demand despite the pandemic. A significant outlier is observed in 2022, where net absorption spiked dramatically, suggesting the occupation of a large industrial space or a one-off major transaction rather than a broad market trend. Following this, 2023 and 2024 have seen minimal absorption in either direction, perhaps in this context suggesting very little movement between units; current tenants may be staying put. This is confirmed by agents who suggest that occupiers of scarce light industrial space may hold on to their premises given little alternatives, even when the space becomes unsuitable or sub-optimal for their business operations.

Figure 8.16 – Net absorption is generally low, with few exceptions

Light industrial net absorption, 2015 Q1 to 2024 Q4 (m^2)



Source: CoStar, 2025.

General industrial [B2]

Stock of buildings and floorspace

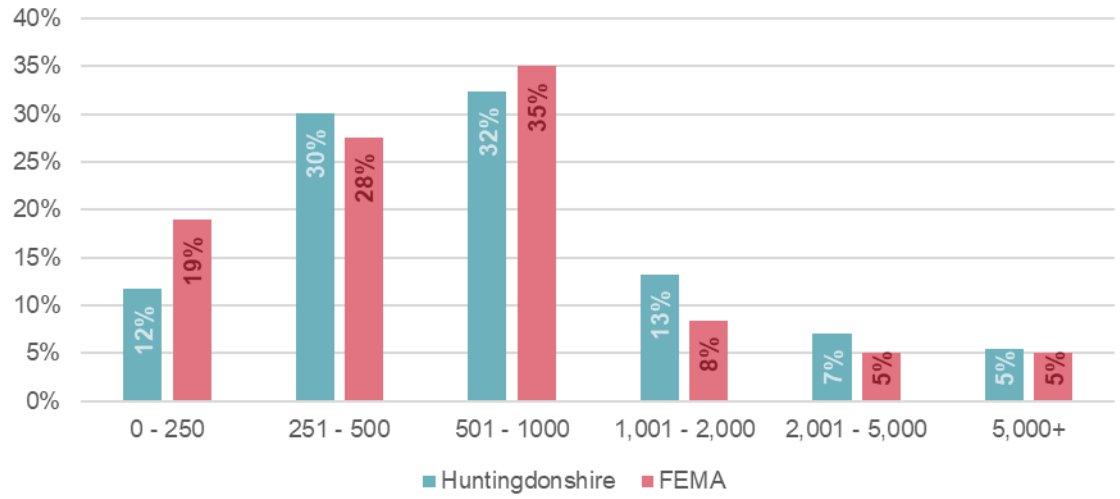
8.27 In total, there are 256 light industrial units located across Huntingdonshire, totalling **353,000m²** of floorspace. This reflects approximately 24% of the general industrial floorspace in the FEMA. Many of these units are clustered around the urban centres: Huntingdon (where the largest Established Employment Areas are located), St Ives, St Neots and Yaxley, in particular. However, outside of these, there are some notable hotspots, for example in the Harvard Industrial Estate just north of Kimbolton, as well as at The Airfield Industrial at Little Staughton.

Age/quality of stock

8.28 The distribution of general industrial units in Huntingdonshire is skewed towards the small-to-medium size categories, with very few of the premises being in the larger two categories. Only 5% of the stock was larger than 5,000m^2 (14 units) and only 7% between 2,000m^2 and 5,000m^2 (18 units). By far the largest two categories were the small-to-medium sized, with 62% of the total stock being between **250m^2 and 1,000m^2**. This reflects the nature of the industrial business in the district, with much of it representing specialist high-tech manufacturing, a building stock which may suit with the needs of SMEs and local industrial occupiers but conversely may struggle to accommodate larger firms or businesses seeking to scale up operations.

Figure 8.17 – General industrial units tend to be smaller-to-medium sized units

General industrial premises by size (m^2)

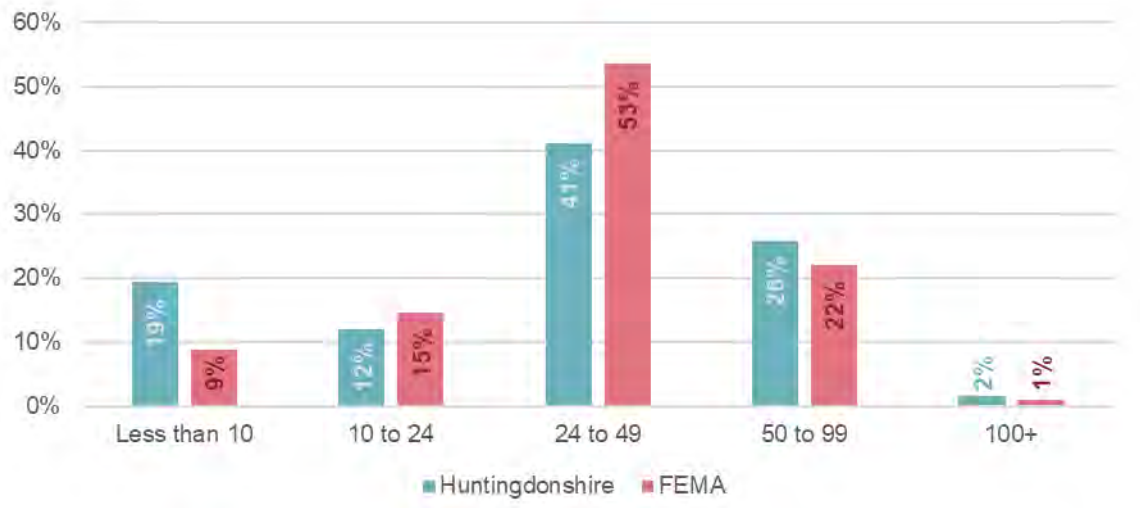


Source: CoStar, 2025.

8.29 Generally, stock of general industrial premises in Huntingdonshire is less old than light industrial, with an average age of **39 years**. The modal age group is the 25 to 49 years, representing 45% of the total stock. The second most common age group was 50 to 99, with 27.6% of the stock. Encouragingly, a higher proportion of the stock when compared to the FEMA was built or most recently renovated in the last decade, totalling 19% of the stock. This suggests that at least some of the demand is being met with newly-constructed facilities.

Figure 8.18 – Most of the stock of general industrial premises is aged/ageing, although new stock is being delivered

General industrial premises by age (years)



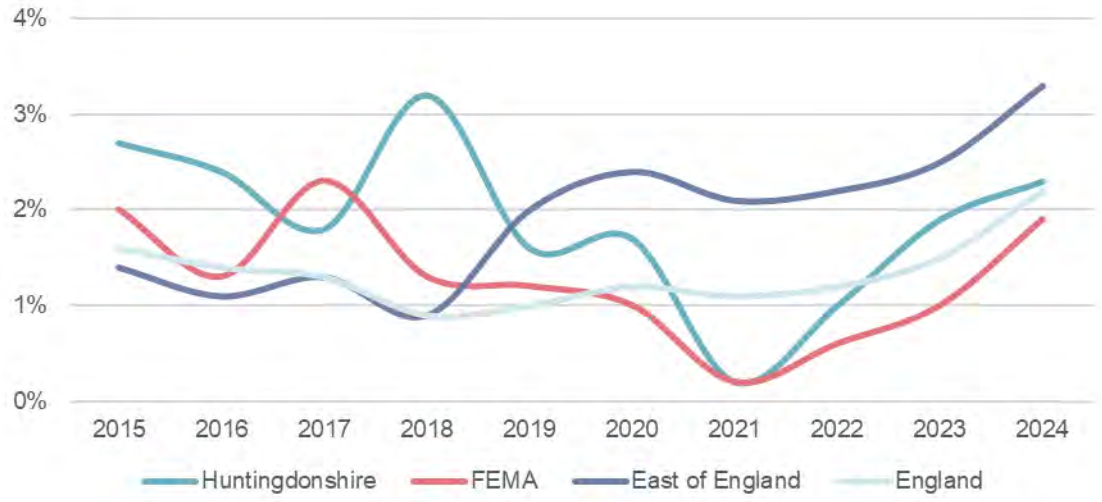
Source: CoStar, 2025.

Vacancy

8.30 Similarly to other use classes, general industrial units in Huntingdonshire have lower vacancy rates than the regional average, although in 2024 the vacancy rate broadly reflected that being recorded in the FEMA and nationally, albeit very low (circa 2% in all regards). Low vacancy in general industrial uses typically indicates strong demand for industrial space, suggesting a healthy local economy, limited supply of suitable sites, and the attractiveness of the area for industrial businesses, but could also point to potential upward pressure on rents and challenges for new or expanding firms trying to find premises.

Figure 8.20 – Huntingdonshire's general industrial vacancy rates remain very low

General industrial vacancy rate, 2015 to 2024 (%)



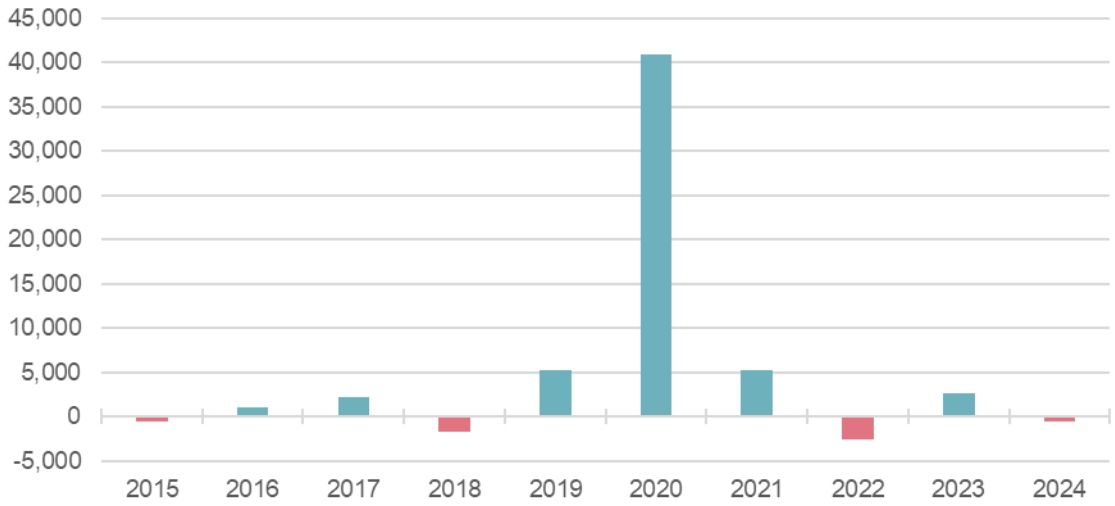
Source: CoStar, (2025).

8.31 With the exception of 2020[150], net absorption of general industrial floorspace has remained relatively low compared to the total amount of stock, meaning that the amount of space leased or occupied over a decade has not significantly exceeded the amount vacated. This could have a range of drivers such as stable but low demand (although market signal suggest that is not the case), businesses are either not expanding or choosing not to locate in Huntingdonshire, or the existing supply may not match current business needs. This observation was supported through engagement with market agents.

[150] In 2020, two very large premises (Alpha Drive and Hotel Chocolat) were leased, which were the main drivers of this year being an outlier compared to the long term trend.

Figure 8.21 – General industrial net absorption has remained very low in comparison to the amount of stock, with the exception of 2020

General industrial net absorption, 2015 Q1 to 2024 Q4 (m^2)



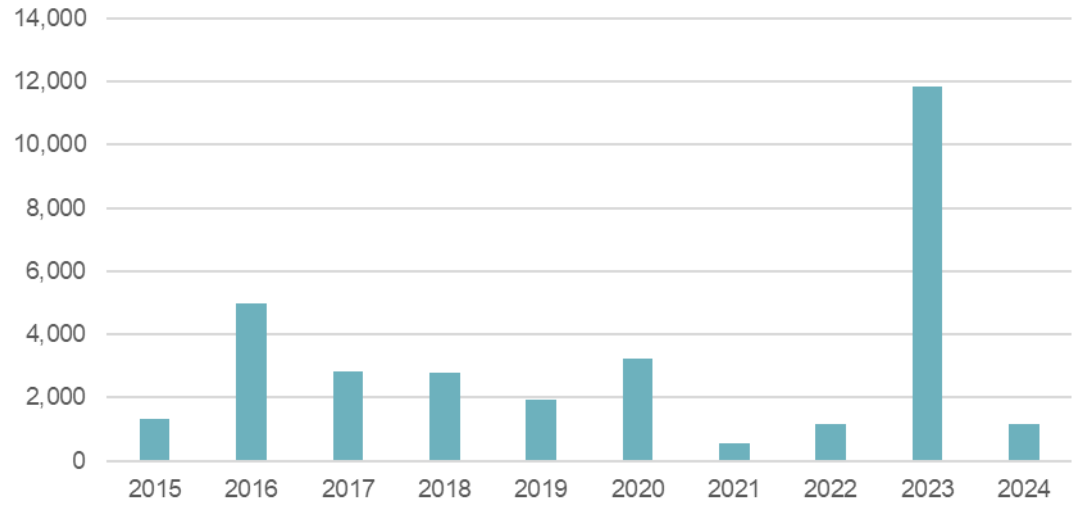
Source: CoStar, 2025.

Leasing

8.32 Over the past decade, the general industrial property market in Huntingdonshire has shown generally trending downward average floorspace per leasing event, potentially indicating a growing preference for smaller industrial units, or lower availability of larger premises Major tenants may occupy larger units for longer periods especially if their operations require the customisation of space that would be inconvenient to relocate, thus limiting their availability. The larger leasing events in 2023 were driven by just two premises (Lightning 126 on Percy Road, and Nordic House, Old Great North Road) in this use class.

Figure 8.22 – Leasing events are generally declining in size although this is sensitive to large premises changing hands

Average size of leasing event, 2015 to 2024 (m^2)

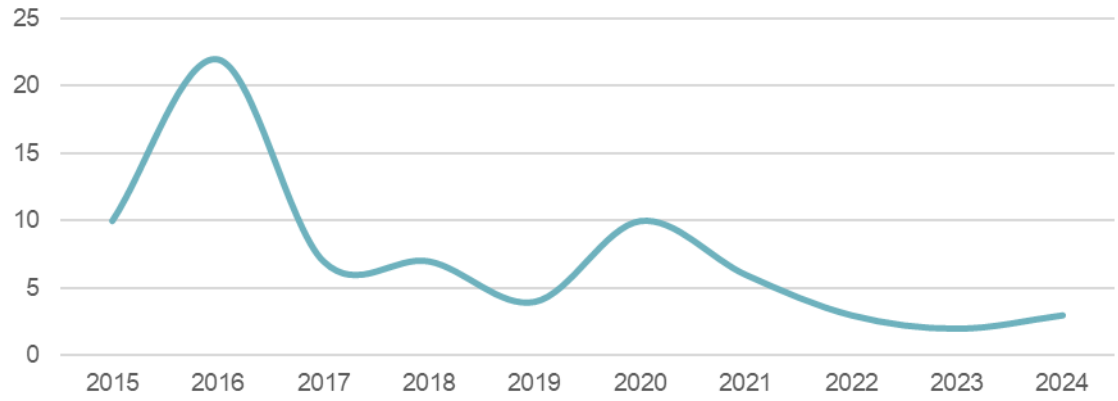


Source: CoStar, 2025.

8.33 Before 2023, the period between 2015 and 2016 saw a relatively higher average number of leasing deals, suggesting that industrial properties were available during these years, possibly due to new developments or tenant turnover. Since 2019, however, leasing activity has declined, with annual events decreasing to low single digits. This reduction may reflect lower demand for industrial space, or more likely driven by dwindling supply of appropriate units. Overall, the industrial market in Huntingdonshire appears to be constrained by availability of premises across the range of occupier needs sought.

Figure 8.23 – The total number of leasing events of general industrial premises has been declining since 2016

Leasing events by year, 2015 to 2024

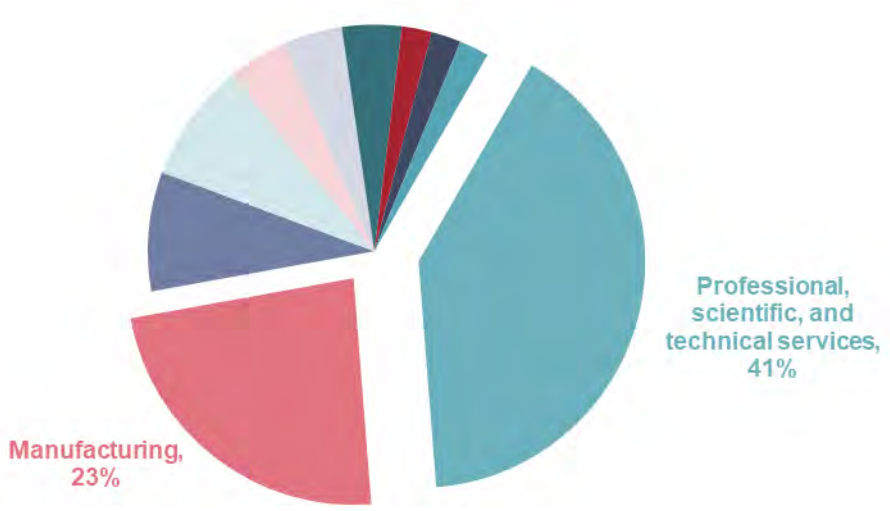


Source: CoStar, 2025.

8.34 The two most common sectors leasing general industrial units in the decade to 2024 were professional, scientific, and technical services, as well as manufacturing firms. This distribution highlights Huntingdonshire's appeal for professional and manufacturing businesses, likely due to its strategic location and industrial specialisms.

Figure 8.14 – Professional, scientific, technical, and manufacturing businesses dominate the general industrial leasing market

Lease deals by sector, 2015 to 2024.



Source: CoStar, 2025.

Storage and distribution [B8]

Stock of buildings and floorspace

8.35 In total, there are 239 storage and distribution units located across Huntingdonshire, totalling **775,000m²** of floorspace. This reflects approximately 16% of the storage and distribution floorspace in the FEMA. The units in Huntingdonshire are predominantly clustered along major transport corridors, particularly the A1, a key north-south arterial route, and the A14, which provides critical east-west connectivity. The densest concentrations of premises are found around St Neots, Huntingdon, and along the A14 corridor, where access to regional and national supply chains is strongest.

8.36 This spatial distribution highlights Huntingdonshire's strategic location, with proximity to key markets such as London, the Midlands, and the Port of Felixstowe. The clustering along transport infrastructure underscores that accessibility is a key factor in site selection for logistics operators. The relative lack of storage and distribution premises in more rural areas likely reflects accessibility constraints relating to distance from the SRN.

8.37 Perhaps predictably, the stock of storage and distribution is skewed towards medium-to-large premises, reflecting the significant spatial requirements for this use class. Very few of these were smaller than 500m^2, whereas the modal size is between **1,000m^2 and 5,000m^2**. Huntingdonshire has a smaller proportion of large premises (over 5,000m^2) than is typical for the FEMA.

Figure 8.24 – The stock of storage and distribution units is skewed towards medium-to-large units, although Huntingdonshire has a smaller proportion of larger units compared to the FEMA

Storage and distribution premises by size (m^2)

Source: CoStar, 2025.

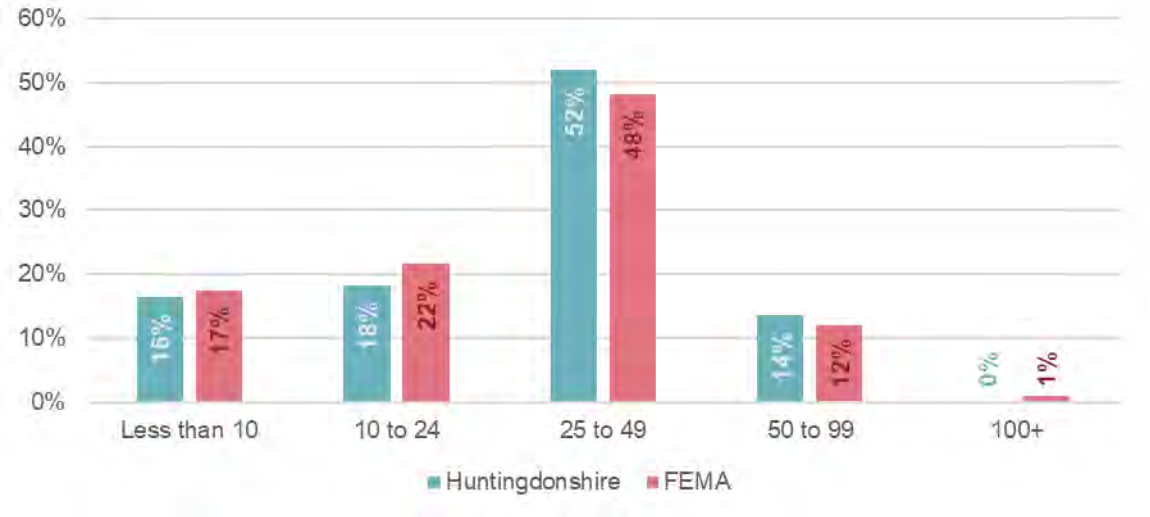
Age/quality of stock

8.38 Similarly to the general industrial category, the stock of premises within the storage and distribution category in Huntingdonshire is aged/ageing, being built or most recently renovated on average **33 years** ago, with the majority of premises (52%) falling within the 25 to 49-year age range. The next most common age group is those built or renovated within the last ten years, making up 16% of the stock of premises, indicating that recent developments are aiming to address the demand for state-of-the-art facilities tailored to contemporary storage and distribution needs, such as high ceilings, advanced access systems, and larger floorplates.

8.39 The 50+ age range represents 15% of the total stock which may still be serving storage and distribution functions needs but would likely require modernisation to meet current standards and be suitable for modern operations, especially as e-commerce and automation-enabled demands continue to increase.

Figure 8.15 – The majority of Huntingdonshire storage and distribution premises are aged 25 to 49 years

Storage and distribution premises by age (years)



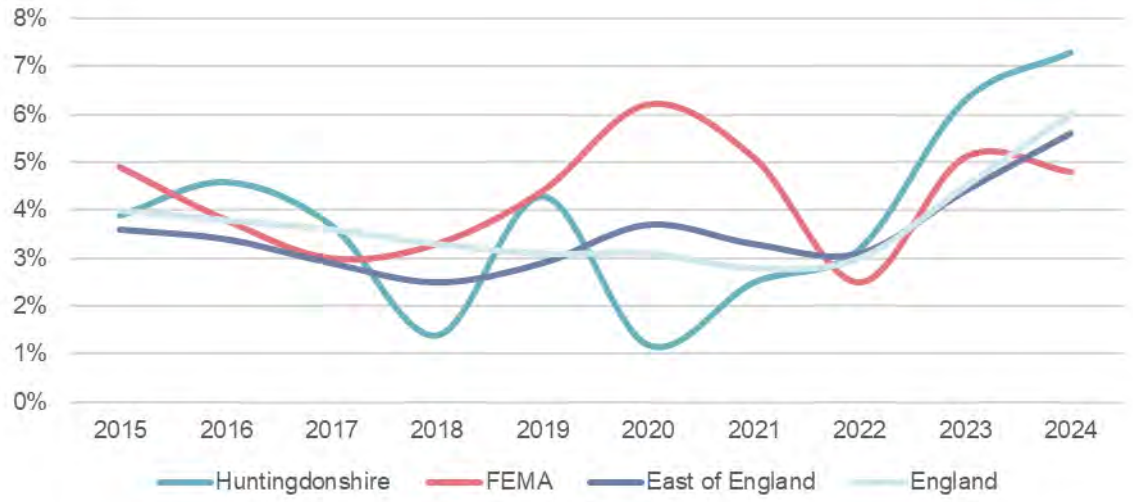
Source: CoStar, 2025.

Vacancy

8.40 Storage and distribution is the only use category in Huntingdonshire that has vacancy rates higher than regionally and nationally in the current period, which on investigation is being driven by a small number of very large premises (primarily Crosslink 252 in Ermine Business Park). However over the last decade, Huntingdonshire follows a similar trend to the comparators, with a roughly increasing trend in vacancy from 2020, whereby it is now at around **7%**. The vacancy rate in the FEMA is slightly lower at around 5%, with the volatility in the trend over this geography similarly affected by large premises coming forward and being taken up.

Figure 8.16 – Huntingdonshire storage and distribution vacancy rates are higher than comparators and rising although this is driven by a limited number of properties

Storage and distribution vacancy rate, 2015 to 2024 (%)



Source: CoStar, (2025).

8.41 Net absorption has shown considerable variability over the 2015 to 2024 period. Between 2015 and 2019, per annum net absorption fluctuated between –26,000m^2 and +55,000m^2 indicating a market with periods of both growth and contraction in demand observed in leasing. On the one hand, fluctuating occupier demand could be driven by uncertainty and changing consumer behaviour, but more likely is influenced by supply (wherein a lack of available stock, or large amounts of new stock coming to market) affecting the different rate year-on-year. Evidence from agents engaged with throughout the study indicates that the latter could be more likely.

Figure 8.17 – Net absorption ranged from -26,000m² to +55,000m² between 2015 and 2024

Storage and distribution net absorption, 2015 Q1 to 2024 Q4 (m²)

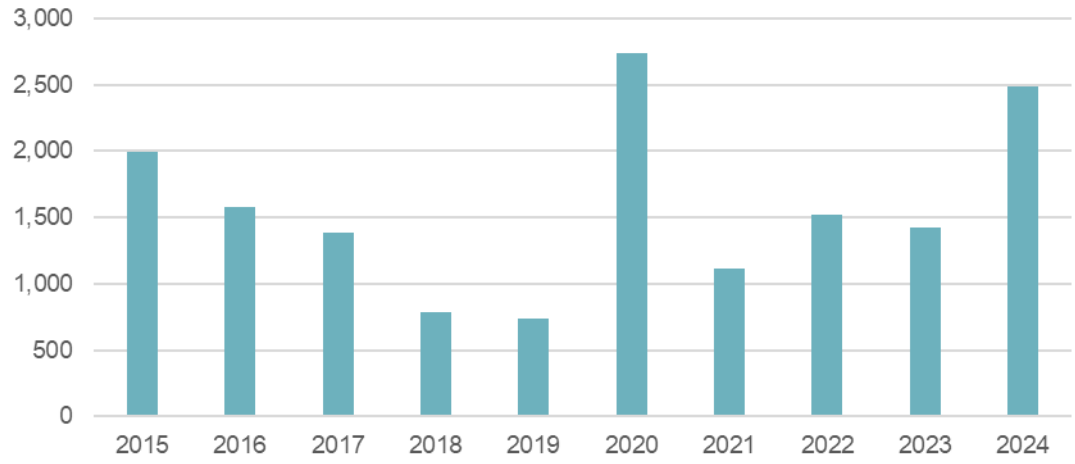
Source: CoStar, (2025).

Leasing

8.42 Trends over the ten years to 2024 in the average size of leasing events show three broad patterns: a gradually reducing average size event to 2020, highest per annum average size event for this period in 2020 (when there was an extraordinary nationwide spike in demand due to increased consumer demand for home deliveries during the pandemic), and a broadly increasing average size to the present day (from a pre-pandemic baseline) towards the larger average size seen in 2020.

Figure 8.29 – The average size of leasing event is trending towards the larger average size recorded in 2020

Average size of leasing event, 2015 to 2024 (m^2).

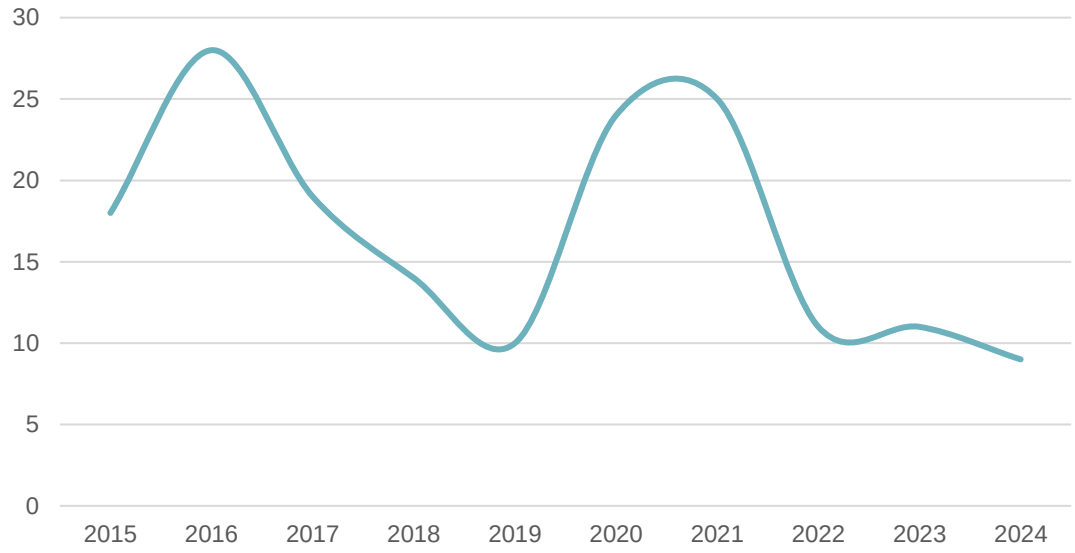


Source: CoStar, (2025).

8.43 The number of annual leasing events has fluctuated significantly over the last decade, possibly reflecting lease renewal cycles and/or periods of extraordinary demand such as during the pandemic. The amount of leasing events undertaken is affected by the availability of storage and distribution space in a given year.

Figure 8.30 – The number of per annum leasing events for storage and distribution space has fluctuated over the past decade

Leasing events per annum, 2015 to 2024



Source: CoStar, (2025).

9. Requirements of key sectors

9.1 Understanding the locational and space requirements of key sectors is essential for linking identified employment needs with economic development aspirations. Different sectors exhibit distinct preferences for location, shaped by factors such as proximity to labour, transport connectivity, supply chains and supporting infrastructure. The specification of spaces can also vary widely, from high-density office environments, to large bespoke manufacturing facilities. This chapter discusses some of the qualitative preferences in relation to the advanced manufacturing, clean energy, creative industries, defence, digital, financial services, life sciences, professional and business services, logistics, and rural sectors.

Advanced manufacturing

Advanced manufacturing businesses like to locate where they have access to a skilled and experienced workforce

9.2 Advanced manufacturing represents a critical and evolving component of the UK's industrial and economic landscape.[151] Characterised by the use of innovative technologies to improve products and processes, the sector includes high-value industries such as aerospace, robotics, precision engineering, electronics, and advanced materials. Within Huntingdonshire, advanced manufacturing could play a vital role in driving productivity, employment, and technological development.

9.3 At the national level, the UK's advanced manufacturing sector is increasingly driven by digital integration, net-zero ambitions, and the need for resilient, high-performance supply chains. Unlike traditional manufacturing, which often requires significant space for mass production, advanced manufacturing tends to rely on cleaner, more flexible, and higher-value operations. This includes significant investment in R&D, precision machinery, and highly skilled labour. As such, locational drivers for the sector are less about proximity to ports or bulk materials and more about access to talent, connectivity to innovation assets, and the availability of adaptable space.[152]

9.4 Clusters around research-intensive institutions (such as in South Cambridgeshire), innovation parks, and enterprise zones are typical of successful advanced manufacturing locations. These environments offer collaborative opportunities, access to testbeds and prototyping infrastructure, and high-quality digital and physical infrastructure. The shift towards 'Industry 4.0'[153] means that reliable, high-capacity broadband, data security infrastructure, and clean energy sources are increasingly fundamental to site selection decisions.[154]

9.5 One of the district's key advantages is its location between several economic anchors: Cambridge with its globally significant R&D base, and Peterborough with its growing clean tech and engineering capabilities. This positioning allows businesses in Huntingdonshire to draw on skilled workers and knowledge spillovers

[151] Department for Business and Trade, 2023. Advanced manufacturing plan.

[152] Stornelli, A., Ozcan, S., and Simms, C., 2021. Advanced manufacturing technology adoption and innovation: A systematic literature review of barriers, enablers, and innovation types.

[153] Industry 4.0, or the Fourth Industrial Revolution, is a broad term encapsulating trends in technology advancement which have the potential to affect, particularly manufacturing, businesses such as automation and digitalisation.

[154] McKinsey & Company, 2022. Transforming advanced manufacturing through Industry 4.0.

from both urban centres while maintaining lower land and operational costs. The area is therefore well-placed for firms seeking a balance between cost-efficiency and access to innovation ecosystems.[155]

9.6 Access to a reliable and skilled workforce is critical. While Huntingdonshire has a relatively strong base of technical and engineering talent, there is competition for skills across the region, particularly with South Cambridgeshire and the Cambridge sub-region. This highlights the need for advanced manufacturing businesses to be located close to population centres and transport infrastructure, as well as near further education (FE) and higher education (HE) providers that can support workforce development.[156]

Advanced manufacturing requires bespoke and adaptable space with the ability to scale

9.7 Advanced manufacturing requires a diverse range of premises. These often include flexible production units with integrated R&D facilities, high-quality office and collaborative space for design and innovation, and warehousing or distribution functions. The spatial footprint of such operations tends to be smaller than traditional manufacturing but with higher requirements in terms of building specification, particularly floor loading, ceiling heights, power supply, ventilation, and security.

9.8 Many modern advanced manufacturing firms also value the ability to scale operations. This drives demand for medium-to-large plots of land that can accommodate phased development or extension. To attract and retain these businesses, it is key to ensure there is a sufficient supply of employment land that is well-located, unconstrained, and capable of accommodating hybrid buildings that integrate production with R&D and office functions.

Clean energy

The clean energy sector will play a vital role in achieving net zero ambitions

9.9 The clean energy sector is one of the most strategically important components of the UK's transition to net zero.[157] Encompassing a broad spectrum of activities, from renewable energy generation and energy storage to smart grid technologies and low-carbon construction, the sector is both technologically diverse and spatially distinctive. It requires land, buildings, infrastructure, and planning support that differ significantly from conventional industrial uses. Understanding these requirements is critical for shaping future growth strategies at both local and national levels.

9.10 The UK Government's Clean Power 2030 Action Plan outlines a clear vision for the electricity system: to decarbonise the grid by 2035 and deliver 95% of power generation from low-carbon sources by 2030.[158] This includes targets to deploy 50 gigawatts (GW) of offshore wind, 45 GW of solar power, and 22 GW of battery energy storage systems (BESS) over the coming decade. Delivering these targets will require over £40 billion in annual investment from 2025 to 2030. Given employment in low carbon and renewable energy economy (LCREE) jobs is growing at a faster rate than overall employment nationally, there will be

[155] HM Government, 2019. Cambridgeshire and Peterborough Local Industrial Strategy.

[156] Cambridgeshire and Peterborough Combined Authority, 2021. Cambridgeshire & Peterborough Advanced Manufacturing Strategy.

[157] Department for Energy Security and Net Zero, 2022. Net Zero Strategy: Build Back Greener

[158] Department for Energy Security and Net Zero, 2024. Clean Power 2030 Action Plan

requirement for additional skills over time which could support workers to transfer into higher productivity roles[159], namely in engineering, welding and mechanical trades, electrical trades, and planning.[160]

9.11 Clean energy infrastructure must be situated to maximise natural resource potential (such as solar irradiance or wind availability), optimise connectivity to the electricity grid, and comply with environmental and land use planning constraints. In parallel, and more closely relevant to the scope of the EENA, new forms of employment space such as hybrid energy research centres, component manufacturing facilities, and control hubs will be required. Occupiers nationally are increasingly seeking 'smart industrial' units which are premises with embedded digital infrastructure, renewable power generation (such as rooftop solar), and readiness for EV charging.[161] New business parks and enterprise zones are being designed with such occupiers in mind, offering enhanced grid capacity, larger service yards, and green travel infrastructure.

9.12 The growth of the clean energy sector creates a virtuous cycle in terms of demand for manufacturing space. Supporting clean energy manufacturing and innovation facilities require 'blended' spaces that merge general industrial, light industrial and office uses what can accommodate different activities under one roof. Industrial intensification that this might involve, particularly on existing sites, also depends on securing grid upgrades, improving plot access, and enabling greater heights and servicing capacity.

Creative industries

9.13 The creative industries include those industries which 'have their origin in individual creativity, skill and talent and which have a potential for wealth and job creation through the generation and exploitation of intellectual property'.[162] This includes advertising and marketing, architecture, crafts, design, film and TV, IT and software, publishing, and cultural/entertainment venues.

9.14 The concentration of creative activity in urban and metropolitan areas has led to affordability pressures and displacement risks, particularly for early-stage creatives, microbusinesses and community-led initiatives.

The creative industries favour clustering

9.15 Creative industries thrive in environments that facilitate frequent collaboration and cultural inspiration. Their success often depends on dense networks of freelancers, microbusinesses, and SMEs, supported by shared infrastructure, local amenities, and proximity to other creative firms. These conditions create a strong tendency toward clustering.

9.16 Nationally, creative industries have gravitated to urban quarters with a mix of affordable workspace, strong digital infrastructure, and access to amenities such as cafés, galleries, performance venues, and green spaces. Research by the Creative Industries Policy and Evidence Centre and the Design Council underscores the importance of "culturally vibrant" and "walkable" neighbourhoods for attracting and retaining creative talent. Informal collaboration, knowledge spillovers, and cross-sector fertilisation such as between digital, design, and performing arts are central to these ecosystems.

9.17 Huntingdonshire, while predominantly rural, possesses assets that align with these locational preferences on a smaller scale. In St Neots, a cluster is forming around the regenerated riverside mills and a growing network of creative practitioners. The Neotists, a grassroots organisation with nearly 350 registered

[159] Energy and Climate Intelligence Unit, 2024. The UK's net zero economy. The scale and geography of the net zero economy in the UK.

[160] Department for Energy Security and Net Zero, 2025. Assessment of the clean energy skills challenge.

[161] CBRE, 2024. UK Real Estate Market Outlook 2024.

[162] House of Lords Library, 2025. Creative industries: Growth, jobs and productivity.

creatives, supports collaboration among photographers, illustrators, digital designers, and other professionals. These examples show that creative ecosystems can thrive in market towns when characterful settings, walkable services, and shared infrastructure are present.

9.18 To sustain and scale creative clusters in Huntingdonshire, interventions could focus on securing affordable workspace, expanding access to digital infrastructure, and supporting cultural programming. Encouraging multi-use creative hubs and building links between existing practitioners, local authorities, and regional institutions will be critical to embedding long-term resilience in the district's creative economy.

Creative production spaces take different forms and sizes

9.19 Creative production spaces span a broad spectrum of typologies, depending on the sub-sector's specific spatial, technical, and infrastructural needs. National studies (e.g. Design Council, Nesta, Creative PEC) highlight the importance of delivering affordable, adaptable spaces that support both the production and presentation of creative work, and that are embedded within their local communities. These spaces enable experimentation, collaboration, and economic resilience across the creative economy.

9.20 The following space types reflect core requirements in the sector and their potential applicability within Huntingdonshire:

- **Studios and makerspaces**: these are small units, often between 20 and 100 sqm, with good natural light, high ceilings, and basic services. They are suitable for artists, designers, and craftspeople. Units in repurposed industrial buildings or retail frontages in town centres (e.g. Huntingdon, St Ives) could serve this market.
- **Digital production services**: creative tech firms, games developers, and animators require flexible, well-connected office-style space, often in the range of 50–500 sqm. These spaces must offer robust broadband, secure access, and room for collaboration. Co-working hubs in town centres or near railway stations could provide ideal bases.
- **Rehearsal and performance spaces**: performing arts companies and musicians require soundproofed, acoustically treated environments with large, open floorplates. These are more difficult to deliver without purpose-built facilities, but adaptable community venues (such as leisure centres or church halls) could offer interim solutions.
- **Hybrid and cultural anchor uses**: some spaces need to combine public access with creative work, such as galleries, workshops, and event spaces. These benefit from being located in high-footfall areas, such as market town centres, and can play a vital placemaking role.

9.21 Across all typologies, affordable rents, flexible lease terms, and access to shared infrastructure are recurring success factors. Local authorities and developers can play a catalytic role by prioritising creative uses in regeneration schemes, supporting meanwhile uses in underused assets, and ensuring long-term provision in masterplans and Section 106 agreements. Huntingdonshire's historic fabric, existing community networks, and growing creative base offer a strong foundation for diversified and place-based provision of creative production space.

Defence

The defence sector requires secure sites and specialist spaces

9.22 The defence sector spans military establishments, defence technology companies, and supply-chain industries serving armed forces. In spatial terms, it includes everything from large secure bases to specialised research labs and training grounds, integrating manufacturing, R&D and intelligence functions. Unlike purely commercial industries, the locational preferences of the defence sector is governed by two key factors: the need for physical security and the need for straightforward access to multi-domain operating forces. These factors have produced a recognisable geography of the sector, usually established on or adjacent to secure campuses straddling strategic road corridors, co-located with runways and military bases, and buffered from incompatible land uses by extensive security.

9.23 Huntingdonshire is home to several such sites, notably the former RAF Alconbury (Now Alconbury Weald) and RAF Molesworth (historically used by the US Air Force) and the still active RAF Wyton. These sites, established in mid-20th century, occupy large areas and include, or included runways and operational buildings.

9.24 Defence industry companies (like contractors developing defence systems) typically need facilities akin to advanced manufacturing, but with added security measures. For example, a firm developing radar systems or missile technology will need R&D laboratories, electronics workshops, and testing facilities (like anechoic chambers for radar testing, or outdoor range space for firing tests). These buildings often look like ordinary industrial units but may have reinforced structures, secure access controls, and secluded locations to reduce risk of security threats. Secure offices for handling classified information are also a feature of defence sector premises. Additionally, defence equipment manufacturing (e.g. assembling military vehicles or precision components) requires production halls with heavy engineering capacity. Other facilities types including training and simulation centres, testing ranges, and supply (logistics) depots.

Strategic positioning and existing defence presence determine the appropriate location for defence facilities

9.25 Defence facilities often have fixed locational drivers tied to strategic geography and legacy. Military bases were historically placed for strategic coverage (RAF Wyton, for instance, was well-placed for WWII air reconnaissance). Today, while some bases remain for their airfield or training terrain, new defence locations tend to be driven by proximity to centres of excellence and workforce. Co-location with high-tech clusters has become important for defence R&D.[163] Firms could also be drawn to existing tech-focussed ecosystems, or locations where there are industrial expertise in sensors, AI and cybersecurity. Existing defence footprint in an area can also be self-reinforcing. Where bases exist, related businesses often cluster nearby to service them. If Huntingdonshire offers secure campus sites (like parts of Alconbury or Wyton) with good connectivity to Cambridge and London (for MoD access), it could attract such uses.

9.26 Transport connectivity plays a key role also. For operational military logistics, being near major transport routes is crucial to move equipment and personnel. The A1 and A14 through Huntingdonshire thus make it

[163] HM Government, 2021. Defence and Security Industrial Strategy: A strategic approach to the UK's defence and security industrial sectors.

an attractive corridor for defence logistics units (indeed, historically many military convoys and movements utilised these routes). Also, for defence industry, moving large components (aircraft parts, armoured vehicles) benefits from highway and even rail connections.

9.27 The defence sector is changing with technology and geopolitical shifts, which in turn alters its spatial needs. There is a trend toward fewer but more high-tech facilities for the military. Many older sprawling bases have partly closed or downsized, while investment is increasingly directed toward cutting-edge capabilities such as cyber operations centres and space command facilities (often in office-like settings). For Huntingdonshire, this could mean that while traditional defence functions may not return in full, portions of former bases could be repurposed into new defence roles. For instance, a site like Alconbury Enterprise Zone could potentially host UAV (drone) development and testing, using existing infrastructure such as hangars for assembly and nearby workspace for supporting tech operations.

Digital

The digital sector needs more than just office space

9.28 The digital sector encompasses ICT companies, software developers, tech start-ups, data and telecom firms, essentially businesses focussing digital technology and services. The primary space need for most digital firms is office space, which is modern and flexible. These companies typically prefer open-plan offices conducive to agile teamwork, with high-speed internet infrastructure and plenty of meeting/collaboration areas. As digital work culture has evolved, certain amenities have become standard, for example, robust climate control (to keep servers or computers cool), backup power supplies (to ensure no downtime), and dedicated creative breakout spaces (and recreational facilities such as gyms) within offices.

9.29 Beyond offices, some parts of the digital sector have specialised facility needs. Data centres are a key example of users of industrial spaces. As demand for cloud computing grows, data centre facilities (essentially large buildings housing racks of servers) are becoming more common. Data centres require very specific sites: they need extremely reliable electricity, strong fibre-optic connectivity, and cooling (which often means either abundant water for cooling or efficient HVAC systems). They also generate noise (from cooling equipment) and heat. Data centres tend to locate in out-of-town sites or edge-of-town industrial estates where large warehouses can be accommodated.

9.30 Another facility type is innovation and incubation centres. Start-ups in the digital sector often begin in incubators or accelerators which provide small offices or hot-desks, shared meeting rooms, and mentorship/business advice. Cambridge has many examples of successful incubator development (such as IdeaSpace and Eagle Labs). Hardware-oriented tech firms (like those designing electronics, sensors, or Internet of Things devices) may need lab or workshop space in addition to an office. This overlaps with advanced manufacturing, but on a smaller prototype scale. For instance, a robotics start-up might need a lab area to assemble and test robots, requiring high ceilings, stable power, maybe a small test track. Flexible light industrial units that can be configured as tech workshops are likely also sought after.

Digital companies need to locate near to where skilled workers want to live and work

9.31 Digital/tech companies are attracted to locations where software engineers, developers, and data scientists want to live and work. Cambridge, with its university and established tech cluster, is a prime magnet in the region and Huntingdonshire could also attract digital firms to the extent that it can offer talent or easy links to talent. The complementary position could focus on the cost and quality of life advantages that the district offers.

9.32 Proximity to innovation and research is another draw for digital businesses, with many start-ups and spinouts associated with higher education institutions. As start-up businesses grow, the space requirements may also increase necessitating locations further away from their original institutions where there is the capacity to expand operations.

9.33 A fundamental driver of locational demand relates to digital connectivity in terms of internet access, especially with the highest bandwidth and low latency connections, which is particularly necessary for companies working with big data or cloud services. Digital businesses may also require dedicated fibre lines and/or direct connections to internet exchange points. Huntingdonshire will benefit from Project Gigabit which is increasing the broadband connectivity of Cambridgeshire, targeting mainly more remote communities, which will have the benefit of both enabling businesses to be located there, support those which are already located more rurally, and allow homeworking and home-based entrepreneurship.[164]

Financial services

9.34 The financial services sector includes banking, insurance, investment management, fintech, and related professional services. Traditionally, the sector is heavily associated with office space, from high-rise headquarters in city centres to back-office processing centres in more peripheral locations. Within Huntingdonshire and similar districts, financial services presence tends to be in the form of regional offices, call centres, bank branches, and support hubs rather than major corporate HQs. The spatial requirements for financial firms are primarily Grade A office space for client-facing and professional staff, and large open-plan offices for administrative and contact centre functions. For example, an insurance company's regional office might need a few floors in a modern office block, equipped with meeting rooms, secure IT infrastructure, and amenities for staff. A call centre or processing centre might occupy a low-rise office on a business park, with a large parking area to accommodate shift workers.

Financial services workers need to be able to easily access urban centres/markets

9.35 Financial services have traditionally clustered in major urban centres to be near markets and each other. Recent developments in hybrid and homeworking have had the effect of changing the utilisation of space such that in rationalising their estates, traditional occupiers of business park premises have considered whether centralising in the very core of economic activity is possible, or whether decentralising functions to regional hubs closer to where people live is desired. Hub-and-spoke models would facilitate the latter trend.

9.36 Connectivity to major urban centres, particularly London, is an important consideration for financial services businesses because it remains the UK's, and indeed one of the world's, financial capital. Huntingdon and St Neots provide direct rail connectivity to London and the City. Client proximity can be relevant for certain sub-sectors such as wealth management or corporate banking, and accountants serving local businesses. Maintaining office presence in town centres is important for client-facing professionals in terms of visibility and convenience for clients. PDR is particularly impactful in driving the loss of suitable offices (for financial services SMEs) in town centres.

[164] Building Digital UK, 2024. Project Gigabit.

Offices need to be attuned to hybrid working to remain suitable for modern ways of working

9.37 The future of financial services workplaces is being shaped by hybrid working and digitisation. Some major banks (namely HSBC in London) have considerably down-sized their occupied floorplates as they embrace hybrid working models. The importance of the quality of office space, and its ability to offer best-in-class, amenity-rich features, as well as excellent sustainability credentials will be essential to maintain occupier interest. Occupiers will increasingly use the pull factors of their offices over time to maintain relationships between workers.

9.38 Automation and the use of artificial intelligence in the financial services is growing, as routine processing jobs such as decision-making and customer services are being automated. This could reduce the overall employment intensity of space over time. Call centres in particular are vulnerable to this trend. For developers of office floorspace, this means having floorplates which can be flexible to evolving occupier demands and that can be subdivided in future to accommodate multiple firms, should one major occupier alter their operations.

9.39 Sustainability and ESG (Environmental, Social, Governance) commitments in finance also influence their commercial property decisions. Banks and insurers increasingly want green buildings, energy efficiency, and locations accessible by public transport to align with their carbon targets and image. These characteristics are also increasingly expected by employees. Retrofitting of offices serving this sector should aim for high environmental standards. This could drive renovations of older offices in Huntingdonshire towns to attract such tenants for example by adding solar panels, better insulation, or cycle parking facilities.

Life sciences

The spatial demands of the life sciences sector are highly specialised

9.40 The life sciences sector, including biotechnology, pharmaceuticals, medical technology, and related fields, has some of the most demanding spatial requirements of any industry. Companies in this sector typically need laboratory space, often in combination with office and meeting areas, in clusters such as science parks or research campuses. Labs come in various specifications (wet labs for chemistry/biology, dry labs for computational work, cleanrooms for pharmaceuticals or microfabrication) and require particular design features: high ceilings to accommodate ventilation and fume hoods, reinforced floors for heavy equipment, reliable climate control (to maintain stable temperatures for experiments), and extensive plumbing and waste systems for lab work. As such, life science buildings are more complex and expensive to build than standard offices. They also have stringent regulatory requirements (especially if dealing with hazardous biological agents or manufacturing pharmaceuticals under Good Manufacturing Practice standards).

9.41 The typical model for life sciences is a science park or campus where companies have either standalone buildings or shared multi-tenant lab buildings, often co-located with institutes or academia. These parks usually feature lots of green space, on-site amenities (cafés, fitness, conferencing), and room for future expansion.

9.42 Another factor is site readiness and support. A biotech firm will relocate or open new labs only if the site can accommodate their very specific requirements quickly. This means having planning in place for lab use, either pre-built lab units or lab-enables custom build options. Incentives like Enterprise Zone status have been successful in some locations in attracting occupiers.

Life sciences firms cluster near cutting-edge research

9.43 The life sciences sector is highly sensitive to location, with firms placing strong emphasis on access to skilled labour, research institutions, clinical infrastructure, and complementary businesses. This reflects the sector's reliance on innovation, collaboration, and knowledge exchange, all of which benefit significantly from clustering. Physical proximity to academic institutions, teaching hospitals, and other science driven organisations creates opportunities for informal interaction, joint ventures, and rapid talent exchange, fuelling a virtuous cycle of innovation.

9.44 The geography of innovation is evolving. While traditional out of town science parks have long served the sector, today's life sciences firms increasingly seek well connected, mixed use environments that combine world class laboratory and office space with access to housing, amenities, and sustainable transport. These modern "innovation districts" prioritise placemaking, ESG credentials, and talent attraction. Proximity to public transport and active travel networks has become particularly important in the post pandemic era, with many firms now looking to reduce car dependency and provide a high quality of life for their employees.

9.45 Agglomeration benefits are particularly pronounced in life sciences due to the interdisciplinary nature of research and development. Firms gain a competitive edge when located near others in the value chain, from biotech start ups and contract research organisations to hospital trusts and global pharmaceutical companies. This clustering drives productivity by enabling collaboration, knowledge spillovers, and shared infrastructure. For some firms, proximity to clinical research facilities is critical, while others prioritise access to academic research or commercial networks. In both cases, connectivity and access to talent remain decisive factors in location choice.

9.46 Furthermore, the availability of nearby housing, particularly affordable homes for researchers, technicians, and healthcare professionals, is increasingly viewed as a determinant of business viability. High housing costs and long commute times can limit workforce retention and recruitment. Locations that integrate employment space with residential development and local services are therefore better positioned to meet the needs of the sector and attract long term investment.

9.47 As global competition for R&D investment intensifies, regions offering a blend of cutting edge infrastructure, skilled labour, sustainable transport, and high quality placemaking will be best placed to support the future growth of the life sciences industry.

Professional and business services

9.48 The professional and business services sector encompasses a wide array of knowledge-intensive activities such as legal services, accountancy, consultancy, architecture, and marketing. These services are crucial enablers of economic activity across all other sectors and tend to cluster in locations with strong business-to-business linkages, high client accessibility, and a deep labour pool of skilled professionals. In spatial terms, professional and business services firms predominantly require high quality office environments, favouring town centre locations for client visibility or business park settings with amenity-rich environments and reliable digital connectivity. For smaller firms, especially in legal, design, or consultancy fields, access to coworking space, flexible leases, and proximity to networking opportunities are important. National trends indicate a shift toward hybrid working, which is reducing the overall quantum of space demanded per worker but increasing the premium placed on the quality and flexibility of workspaces, including meeting areas and shared collaboration zones.

9.49 Huntingdonshire's accessibility to Cambridge, London, and the Midlands presents a locational advantage for professional business services occupiers seeking a base with cost-effective space and strong transport links. St Neots and Huntingdon in particular are attractive due to their direct rail connections and growing commercial centres. The availability of Grade A office space, however, remains constrained in some parts of

the district, and recent conversions under PDR have eroded the supply of centrally located offices[165]. This presents both a challenge and an opportunity. Regeneration schemes and new mixed-use developments should be encouraged to provide high quality, ESG-compliant commercial space to retain and attract professional services firms. Additionally, a pipeline of small-scale office and co-working space in rural and semi-urban areas could support sole traders and start-ups operating remotely or looking for local professional bases.

Logistics

9.50 The logistics sector covers warehousing, freight distribution, and transportation services – essentially the infrastructure and operations that move goods from producers to consumers. Local trends in the sector are discussed in **Section 5**. For completeness, a brief overview of the key locational and space requirements is provided here.

Logistics premises range from last-mile facilities to national distribution centres

9.51 The government's Future of Freight strategy acknowledges a shortage of space and the need to secure new land for logistics.[166] It highlights that where demand exceeds supply, planning must adapt to allow expansion or new sites. Spatially, logistics is characterised by large-footprint facilities such as warehouses and distribution centres. These typically are one-story, big 'shed' buildings with high ceilings to allow racking, and extensive yard space for truck manoeuvring and loading docks. The scale of logistics facilities varies based on their function. Modern warehouses are increasingly expansive to accommodate vast inventories and sophisticated automation systems. Therefore, logistics facilities need significant land, which is preferably flat and unconstrained.

9.52 Trends in the logistics sector and technology and consumer expectations evolve translates into different building requirements. Automated processes that increasingly use robots for picking, automated sorting, and even driverless forklifts mean buildings need to be built taller, and perhaps with different layouts (if human dimensions such as gaps in aisles are not required). Autonomous vehicles and drones for delivery are thought to be on the horizon. Trials of driverless HGV convoys and delivery drones are underway, and if implemented in logistics supply chains could require new infrastructures such as drone launch pads or special parking and docking facilities.

Strategic location is a key determinant for logistics operations

9.53 The optimal location, as described by the BPF, for logistics functions takes into account key attributes, including: motorway/A-road access; ability to serve markets within a two hour drive, access to a good workforce with a range of skills; proximity to amenities; intermodal facilities; good availability of utilities, services and broadband; ability to operate 24/7 without impediments; and a good, level, developable site.[167] In summary:

[165] HDC, 2024. Huntingdonshire Business Completions and Commitments 2023/24.

[166] Department for Transport, 2022. Future of freight plan.

[167] British Property Federation, 2022. Levelling Up: The Logic of Logistics.

- The logistics sector's prime locational driver arguably is transport connectivity. Specifically, access to the SRN of motorways and trunk roads is crucial. This has various aspects including operational efficiency (reducing time wastage for drivers stuck in traffic on unsuitable smaller feeder roads, and therefore proportionally more of journeys at higher speeds). Rail connectivity can also be a factor for certain distribution uses (rail freight terminals), although there is currently no existing infrastructure of this type in Huntingdonshire.
- Land availability and cost are another crucial factor. Logistics requires large plots, and the land must be affordable enough to make a large-scale warehouse viable. This often pushes such developments to outskirts of cities or rural areas along motorways, which would otherwise be unsuitable for residential development.
- Last-mile delivery is expanding due to e-commerce. One trend is establishing micro-fulfilment centres closer to customers. Grocery chains implementing rapid home delivery are creating small dark stores (essentially micro warehouses) in towns. Such uses could repurpose smaller retail or light industrial spaces in town centres.
- Labour and workforce is a locational aspect too: big warehouses employ hundreds of pickers, drivers, and other roles. They need a catchment of available labour. Areas with slightly higher unemployment or a tradition of manufacturing often supply this labour. Principles of sustainable urban development mean that adjacency to new housing development (such that local employment opportunities are synergistic with residential development) may be suitable locations for logistics premises, notwithstanding visual, amenity, air and light pollution, noise and other environmental impact considerations. However, automation may be offsetting labour needs – some sites which operate heavily automated could reduce the labour criterion somewhat and greater emphasis could be placed on transport and cost factors.

Rural economy

9.54 The rural economy comprises the range of agriculture, forestry, fishing, and the various diversified businesses operating in the countryside, from farm-based enterprises to tourism, rural services, and small-scale manufacturing in villages. Local trends in the rural economy are discussed in **Section 5**. For completeness, a brief overview of the key locational and space requirements is provided here.

The farm is still the cornerstone of the rural economy

9.55 The main spatial asset of the rural economy is land, and although sufficient agricultural land to sustain food growing must be safeguarded, farms often repurpose some of their land or buildings for non-farming uses to supplement income (rural diversification). Employment can be supported in a range of spaces:

- Farm buildings: the leasing of unused buildings for non-agricultural use is increasingly prevalent across England[168]. This means that old barns or sheds are converted into workshops, storage units, or offices for other businesses. For instance, a landowner may convert a stable block into small craft workshops, or an old granary into offices for a local firm. This requires planning flexibility and PDR are often invoked for these conversions. Recent extensions to PDR broadened the scope of buildings which can change from agricultural to alternative uses.
- Processing and direct sales: small processing units which could supply a farm allow for direct sales. The processing activities require small industrial-type buildings, or reuse of barns, as well as parking for visitors.
- Rural workshops and light industry: many foundational economy[169] businesses including small manufacturers or artisan creatives operate from rural sites (such as furniture makers in converted

[168] Department for Environment, Food and Rural Affairs, 2024. Farm Accounts in England data sets.

[169] The foundational economy concept refers to those industries and businesses which support the everyday lives of communities and is particularly linked to local employment.

barns, car repairs in farm outbuildings, and small food producers in sheds). These benefit from lower rent and flexibility offered by the space and informal use of rural sites. More transformative diversification may lead to mini-business park/industrial estate typologies developing.

- Home-based businesses and remote work: the rural economy also includes a significant share of sole traders and remote/non-home based workers, which may not need separate premises, but their presence drives demand for flexibly leased space (e.g. co-working office or storage units to be used on a temporary basis). Remote working enables more professional work to be undertaken from rural locations.

Amenity and community as locational drivers for the rural economy

9.56 Accessibility and infrastructure can present constraints to employment growth in rural areas as roads can be narrow (limiting vehicular movements and capacity), public transport services may sparse (prohibiting alternative travel options at convenient time), and broadband may be slow in part. Businesses will locate where they can overcome these to some extent. For example, a rural industrial estate that is nearby to a B-road or near a trunk road junction will be more attractive than one deep inside a network of narrow lanes. Many villages in Huntingdonshire are near A-roads (for example, those along the A1 or A141) and have seen commercial development at the edges accordingly.

9.57 The rural economy's locational drivers often hinge on natural resource availability or amenity value. Community and quality of life are also attractive characteristics for certain employers. Those employed in rural enterprises may choose to live and work in the countryside for lifestyle reasons, even if profitability is lower. This means if rural communities remain vibrant (with basic services, schools, etc.), businesses are more likely to be either started or retained there. Conversely, if villages lose all amenities, it becomes harder to attract workforce or entrepreneurs to stay. Therefore relatedly, sustaining rural services (shops, pubs, broadband, transport) indirectly supports the economy by keeping the countryside habitable for working age people.

10. Supply assessment

10.1 Assessing the '*existing stock of land for employment uses*' is a central requirement of an economic need assessment. An understanding of the existing quantity and characteristics of employment land is important for comparing against future needs/requirements, such that gaps in provision can be identified.[170]

10.2 Employment uses which are within the scope of the assessment are: office, research and development, light industrial, general industrial, and storage and distribution (logistics). These uses align with the central uses described in guidance.[171] It is recognised that additional uses (retail, hotel, transportation and leisure) contribute to employment although these are generally considered to be assessed separately within their own focussed studies.

10.3 This section presents a list of the sites which have been identified as comprising the existing and potential future supply of employment land. Each of these sites is subject to a desk-based assessment. A representative sample of these sites was selected to be surveyed using in-person site visits. The survey criteria against which each of the sites will be assessed are described in detail, including firstly an explanation of the criterion and secondly a definition of how these are recorded in practice. The purpose of defining the assessment criteria in detail is to allow for consistent appraisal across each of the sites, and to inform a RAG rating.

Supply of employment land

10.4 The employment sites which are considered to represent the stock of employment sites within Huntingdonshire have been identified through a review of the following sources:

- Established Employment Areas within the current Huntingdonshire Local Plan;
- Local Plan to 2036 employment allocations;
- Neighbourhood Plans;
- Call for Sites exercise (sites identified for 'commercial' and 'mixed' use where a potential use falls within the scope of the EENA) which was concluded in 2023;
- Ongoing Call for Sites exercise (sites identified as above) which allows for sites to be put forward after the main exercise which concluded in January 2025;
- Alconbury Enterprise Zone; and
- A review of CoStar commercial data for areas not identified by these existing sources.

10.5 **Table 10.1** shows the **127 sites** which are considered in the site supply assessment. These sites are selected because of their existing allocation/identification within planning policy, because of their current and possible future importance for strategic planning and contribution to employment, and/or because their existing/proposed uses are relevant to the scope of the EENA. Some of the extents of these sites overlap where they have been retrieved from different sources.

10.6 Many of the sites comprise portions of the same cluster of activity and/or are adjacent to existing sites. Those sites indicated in bold are selected to be assessed in-person, in addition to the desk-based appraisal which all of the sites are subject to. These sites are selected reflecting their current placed importance (particularly Established Employment Areas which are safeguarded by planning policy), possible future

[170] Ministry of Housing, Communities and Local Government, 2024. Planning practice guidance: Housing and economic needs assessment.

[171] Ministry of Housing, Communities and Local Government, 2024. Planning practice guidance: Housing and economic needs assessment.

importance and potential (based on strategic growth aspirations such Alconbury Enterprise Zone), and/or to ensure the assessment representative of the range of sites (capturing significant Call for Sites sites).

Table 10.1 – The supply assessment considered 127 employment sites

Supply of employment sites included for assessment

Site name	Area	Site type/designation, if applicable	Source	Site ID
Crossways Distribution Centre	Alconbury Hill	Established Employment Area	Local Plan†; 2014 ELS	E1
Minerva Business Park	Alwalton	Established Employment Area	Local Plan†; 2014 ELS	E2
Earith Business Park	Earith	Established Employment Area	Local Plan†; 2014 ELS	E3
Lakeside Technology Park	Fenstanton	Established Employment Area	Local Plan†; 2014 ELS	E4
Sand Road Industrial Estate	Great Gransden	Established Employment Area	Local Plan†; 2014 ELS	E5
Hardwicke Road Industrial Estate	Great Gransden	Established Employment Area	Local Plan†; 2014 ELS	E6
Harley Industrial Park	Great Paxton	Established Employment Area	Local Plan†; 2014 ELS	E7
Cardinal Park	Godmanchester	Established Employment Area	Local Plan†; 2014 ELS	E8
Chord Business Park / Roman Way Centre	Godmanchester	Established Employment Area	Local Plan†; 2014 ELS	E9
Upland Industrial Estate	Houghton and Wyton	Established Employment Area	Local Pla†n; 2014 ELS	E10
Houghton Hill Industries	Houghton and Wyton	Established Employment Area	Local Plan†; 2014 ELS	E11

Site name	Area	Site type/designation, if applicable	Source	Site ID
Ermine Business Park	Huntingdon	Established Employment Area	Local Plan†; 2014 ELS	E12
Hinchingbrooke Business Park	Huntingdon	Established Employment Area	Local Plan†; 2014 ELS	E13
St Peter's Road Industrial Area	Huntingdon	Established Employment Area	Local Plan†; 2014 ELS	E14
Stukeley Meadows Industrial Estate	Huntingdon	Established Employment Area	Local Plan†; 2014 ELS	E15
Bicton Industrial Park / Harvard Industrial Estate	Kimbolton	Established Employment Area	Local Plan†; 2014 ELS	E16
The Airfield Industrial Estate	Little Staughton	Established Employment Area	Local Plan†; 2014 ELS	E17
Needingworth Industrial Estate	Needingworth	Established Employment Area	Local Plan†; 2014 ELS	E18
Highlode Industrial Estate	Ramsey	Established Employment Area	Local Plan†; 2014 ELS	E19
Upwood Air Park	Ramsey	Established Employment Area	Local Plan†; 2014 ELS	E20
Brookside Industrial Estate	Sawtry	Established Employment Area	Local Plan†; 2014 ELS	E21
Black Horse Business Park	Sawtry	Established Employment Area	Local Plan†; 2014 ELS	E22
West Newlands Industrial Estate	Somersham	Established Employment Area	Local Plan†; 2014 ELS	E23
Meadow Lane Business Park	St Ives	Established Employment Area	Local Plan†; 2014 ELS	E24

Site name	Area	Site type/designation, if applicable	Source	Site ID
Marley Road Industrial Area	St Ives	Established Employment Area	Local Plan†; 2014 ELS	E25
Parsons Green Business Park	St Ives	Established Employment Area	Local Plan†; 2014 ELS	E26
Somersham Road Industrial Area	St Ives	Established Employment Area	Local Plan†; 2014 ELS	E27
Compass Point Business Park	St Ives	Established Employment Area	Local Plan†; 2014 ELS	E28
Station Road Industrial Area	St Neots	Established Employment Area	Local Plan†; 2014 ELS	E29
Cromwell Road Industrial Estate	St Neots	Established Employment Area	Local Plan†; 2014 ELS	E30
Colmworth Business Park	St Neots	Established Employment Area	Local Plan†; 2014 ELS	E31
Howard Road Industrial Estate	St Neots	Established Employment Area	Local Plan†; 2014 ELS	E32
Little End Road Industrial Estate / Apha Drive Business Park	St Neots	Established Employment Area	Local Plan†; 2014 ELS	E33
Warboys Airfield Industrial Estate	Warboys	Established Employment Area	Local Plan†; 2014 ELS	E34
Broadway Business Park	Yaxley	Established Employment Area	Local Plan†; 2014 ELS	E35
Eagle Business Park	Yaxley	Established Employment Area	Local Plan†; 2014 ELS	E36
Alconbury Enterprise Zone	Alconbury	Enterprise Zone	Local Plan†; Enterprise Zone	EZ1

Site name	Area	Site type/designation, if applicable	Source	Site ID
Brook Farm	Grafham and Ellington	Local Employment Area	Grafham and Ellington Neighbourhood Plan 2020 - 2036	GE1
Oakwood Business Park	Sawtry	Permitted development	Sawtry Village Neighbourhood Plan	S1
Eastern Expansion	**St Neots**	**Employment to be brought forward as part of residential mixed use allocation**	**Local Plan†; St Neots Neighbourhood Plan 2016**	**SEL2**
West of Railway, Brampton Rd, Huntingdon	**Huntingdon**	**Local Plan to 2036 employment allocation**	**Local Plan† employment layer***	**HU4**
Park View Garage, Brampton	**Brampton**	**Local Plan to 2036 employment allocation**	**Local Plan† employment layer***	**HU13**
Yax Pak, Yaxley	**Yaxley**	**Local Plan to 2036 employment allocation**	**Local Plan†employment layer***	**YX2**
South of Bicton Industrial Estate, Kimbolton	**Kimbolton**	**Local Plan to 2036 employment allocation**	**Local Plan†employment layer***	**KB3**
Giffords Farm, St Ives	**Holywell-cum-Needingworth**	**Local Plan to 2036 employment allocation**	**Local Plan†employment layer***	**SI3**
Bearscroft Farm	**Godmanchester**	**Local Plan to 2036 employment allocation**	**Local Plan†employment layer***	**HU16**
Home Farm South, Abbots Ripton	Abbots Ripton	Mixed Use	Call for sites	CfS:259
Sapley Park Garden Village	Abbots Ripton; Huntingdon; Kings Ripton; The Stukeleys	Mixed Use	Call for sites	CfS:197
Land at Potton Road (Rectory Farm), Eynesbury Hardwick, St Neots	Abbotsley	Mixed Use	Call for sites	CfS:21

Site name	Area	Site type/designation, if applicable	Source	Site ID
Land East of Wintringham Park, St Neots	Abbotsley	Mixed Use	Call for sites	CfS:208
Land East of St Neots	**Abbotsley**	**Mixed Use**	**Call for sites**	**CfS:253**
North of Wintringham Hall, Cambridge Road, St Neots	Abbotsley	Commercial	Call for sites	CfS:278
Land South of Great North Road, Alconbury	Alconbury	Mixed Use	Call for sites	CfS:164
Brooklands Farm, land to the East of A1 junction 13, Alconbury	**Alconbury**	**Commercial**	**Call for sites**	**CfS:329**
Land North of B1043 and East of Alconbury, Alconbury	**Alconbury**	**Commercial**	**Call for sites**	**CfS:321**
Land at Weybridge Farm (Brampton Cross)	**Alconbury; Ellington**	**Commercial**	**Call for sites**	**CfS:232**
Land to the North of the Crossways Distribution Centre, Alconbury Hill	**Alconbury Weston**	**Commercial**	**Call for sites**	**CfS:327**
Safefield Farm, North West of Alconbury Airfield	**Alconbury Weston; Upton and Coppingfford; The Stukeleys**	**Mixed Use**	**Call for sites**	**CfS:43**
Area 4 Park Farm, Brampton	**Brampton**	**Commercial**	**Call for sites**	**CfS:226**
Land North of A141, South of Brampton racecourse, Brampton	**Brampton**	**Commercial**	**Call for sites**	**CfS:343**
Land at Low Harthay and Woodhatch Farms (smaller site), Brampton	**Brampton; Ellington**	**Commercial**	**Call for sites**	**CfS:140**
Land at Low Harthay and Woodhatch Farms (larger site), Brampton	**Brampton; Ellington**	**Commercial**	**Call for sites**	**CfS:44**
Area 3 Park Farm, Brampton	**Brampton**	**Mixed Use**	**Call for sites**	**CfS:225**

Site name	Area	Site type/designation, if applicable	Source	Site ID
Land South West Of Old Toll Bar House Toll Bar Lane, Keyston	Bythorn and Keyston	Mixed Use	Call for sites	CfS:158
Land South of A14, Catworth	Catworth	Commercial	Call for sites	CfS:63
Land West of A1 (North of Peterborough Motorway Services) - Option A, (larger site) Haddon	**Chesterton; Haddon**	**Commercial**	**Call for sites**	**CfS:209**
Land at Woolpack Farm, Conington	Conington	Commercial	Call for sites	CfS:381
Galley Hill, Fenstanton	Fenstanton	Commercial	Call for sites	CfS:46
Land off Conington Road, Fenstanton	Fenstanton	Mixed Use	Call for sites	CfS:265
Land adjacent A1 at Norman Cross, Folksworth	Folksworth and Washingley	Commercial	Call for sites	CfS:130
Emmanuel Knoll Village, Godmanchester	**Godmanchester**	**Mixed Use**	**Call for sites**	**CfS:207**
Land South of Caxton Road, Great Gransden	Great Gransden	Mixed Use	Call for sites	CfS:202
Land at Sand Road, Great Gransden	Great Gransden	Commercial	Call for sites	CfS:297
Land North of Harley Industrial Park, Paxton Hill, Great Paxton	Great Paxton	Commercial	Call for sites	CfS:302
Brook Farmyard (central site), Great Staughton	Great Staughton	Mixed Use	Call for sites	CfS:373
Brook Farmyard (with eastern expansion), Great Staughton	Great Staughton	Mixed Use	Call for sites	CfS:374
Brook Farmyard (with western expansion), Great Staughton	Great Staughton	Mixed Use	Call for sites	CfS:375
Land West of A1 (North of Peterborough Motorway Services) - Option B (smaller site), Haddon	**Haddon; Chesterton**	**Commercial**	**Call for sites**	**CfS:206**
Land at A1 West (South) - South of Peterborough Motorway Services, Haddon	Haddon	Commercial	Call for sites	CfS:212

Site name	Area	Site type/designation, if applicable	Source	Site ID
The Lattenburys (land to the South of the A1307 and North of A14, and West of A1198)	**Hemingford Abbots; Godmanchester**	**Mixed Use**	**Call for sites**	**CfS:247**
Land North of Bluntisham Road, Needingworth	Holywell-cum-Needingworth	Mixed Use	Call for sites	CfS:185
Tir na Nog, Sawtry Way, Houghton	Houghton and Wyton	Mixed Use	Call for sites	CfS:90
Land at New Manor Farm, Houghton and Wyton	Houghton and Wyton	Commercial	Call for sites	CfS:196
Land South East of Bicton Industrial Estate Kimbolton	**Kimbolton**	**Commercial**	**Call for sites**	**CfS:365**
Land North of Station Lane, Offord Cluny	Offord Cluny and Offord D'Arcy	Mixed Use	Call for sites	CfS:308
Land to the West of Toll Bar Way and North of Whitehall Farm, Sawtry	Sawtry	Commercial	Call for sites	CfS:338
Land Southwest of B1090 and East of Stangate Hill B1043 (larger site), Sawtry	Sawtry	Commercial	Call for sites	CfS:15
Land South of Old Great North Road Industrial Estate (smaller site), Sawtry	Sawtry	Commercial	Call for sites	CfS:384
Land East of B1043 and East of Keeper's Cottage, Sawtry	Sawtry	Commercial	Call for sites	CfS:335
Land at Brickyard Farm, Sawtry	**Sawtry**	**Commercial**	**Call for sites**	**CfS:76**
Land to the North East of the Brookside Industrial Estate, Sawtry	Sawtry	Commercial	Call for sites	CfS:169
Land at Little Common Farm, Sawtry	Sawtry	Commercial	Call for sites	CfS:380
Land North of Black Horse Industrial Estate (smaller site), Sawtry	Sawtry	Commercial	Call for sites	CfS:385

Site name	Area	Site type/designation, if applicable	Source	Site ID
Sibson Garden Community	Sibson-cum-Stibbington; Water Newton	Mixed Use	Call for sites	CfS:348
Land at Thrapston Road, Spaldwick	Spaldwick	Commercial	Call for sites	CfS:86
Land North of Meadow Lane, St Ives	St Ives	Commercial	Call for sites	CfS:110
Land North East of Wintringham, St Neots	St Neots	Mixed Use	Call for sites	CfS:362
Land East of Loves Farm (Tithe Farm Extension), St Neots	St Neots; Abbotsley	Mixed Use	Call for sites	CfS:16
Nook Farm, Little Stukeley	The Stukeleys	Mixed Use	Call for sites	CfS:36
Land North of A141, between Huntingdon Racecourse and A1307	**The Stukeleys**	**Commercial**	**Call for sites**	**CfS:221**
RAF Upwood - Phase 4, Upwood	**Upwood and The Raveleys**	**Commercial**	**Call for sites**	**CfS:82**
Huntingdon Racecourse	**The Stukeleys**	**Commercial**	**Call for sites**	**CfS:276**
Land rear of 51 Church Road, Warboys	Warboys	Mixed Use	Call for sites	CfS:133
Land at Ramsey Road, Warboys	Warboys	Mixed Use	Call for sites	CfS:293
Wyton Airfield	**Wyton-on-the-Hill**	**Mixed Use**	**Call for sites**	**CfS:95**
Hungary Hall, West of A141, Wyton-on-the Hill	**Wyton-on-the-Hill**	**Mixed Use**	**Call for sites**	**CfS:47**
Lodge Farm, North of A141, Huntingdon (Wyton on the Hill)	**Wyton-on-the-Hill; Huntingdon**	**Mixed Use**	**Call for sites**	**CfS:256**
Land North of Houghton Road (southern portion), St Ives (Wyton on the Hill)	Wyton-on-the-Hill	Mixed Use	Call for sites	CfS:263
Land to the North of Houghton Road (larger site), St Ives	Wyton-on-the-Hill	Mixed Use	Call for sites	CfS:198

Site name	Area	Site type/designation, if applicable	Source	Site ID
Eagle Business Park, Phase 3, Yaxley	Yaxley	Commercial	Call for sites	CfS:18
Land South West of Yaxley and East of A1(M) near Norman Cross	**Yaxley**	**Commercial**	**Call for sites**	**CfS:126**
Chesterton Garden Village	**Chesterton**	**Mixed Use**	**Ongoing call for sites**	**CfS23-2414**
Land to North of Station Road, Holme	Holme	Mixed Use	Ongoing call for sites	CfS23-243
South of Station Road, Holme	Holme	Mixed Use	Ongoing call for sites	CfS23-244
Land West of A1(M) between junctions 16 and 17, and South of Haddon Road	Haddon; Morborne; Folksworth & Washingley	Commercial	Ongoing call for sites	CfS23-2415
Land South of the A14, Spaldwick (modest employment)	Spaldwick	Commercial	Ongoing call for sites	CfS23-24285
Land East of Cow Lane, Godmanchester	Godmanchester	Commercial	Ongoing call for sites	CfS23-24265
Land at Station Road, St Neots	St Neots	Mixed Use	Ongoing call for sites	CfS23-24125
Land off Old North Road, Sawtry	Sawtry	Commercial	Ongoing call for sites	CfS23-24188
Hinchingbrooke Hospital site, Hinchingbrooke Park Road, Huntingdon*	**Huntingdon**	**Mixed Use**	**Ongoing call for sites**	**CfS23-24288**
Land between Dobbies Garden Centre and Splash Lane, Wyton	Houghton and Wyton	Mixed Use	Ongoing call for sites	CfS23-24264
Former Motorway Compound Site, North of A1198 roundabout	Godmanchester	Commercial	Ongoing call for sites	CfS23-24295
Five Acres Farm, South of Needingworth Road	Holywell-cum-Needingworth	Commercial	Ongoing call for sites	CfS23-24306
Land to the East of Paxton Hill, Great Paxton	Great Paxton	Mixed Use	Ongoing call for sites	CfS23-24314

Site name	Area	Site type/designation, if applicable	Source	Site ID
Land North Of 23 To 33 Oundle Road, Alwalton (larger site)	Alwalton	Mixed Use	Ongoing call for sites	CfS23-24298
Bottom Lodge Farm / Land at A1 West (North)	**Chesterton; Haddon**	**Mixed Use**	**Ongoing call for sites**	**CfS23-24296**
Woolley Road	**Alconbury**	**Research and development**	**Review of CoStar**	**C1**

† The term Local Plan used here refers to Huntingdonshire's Local Plan to 2036.

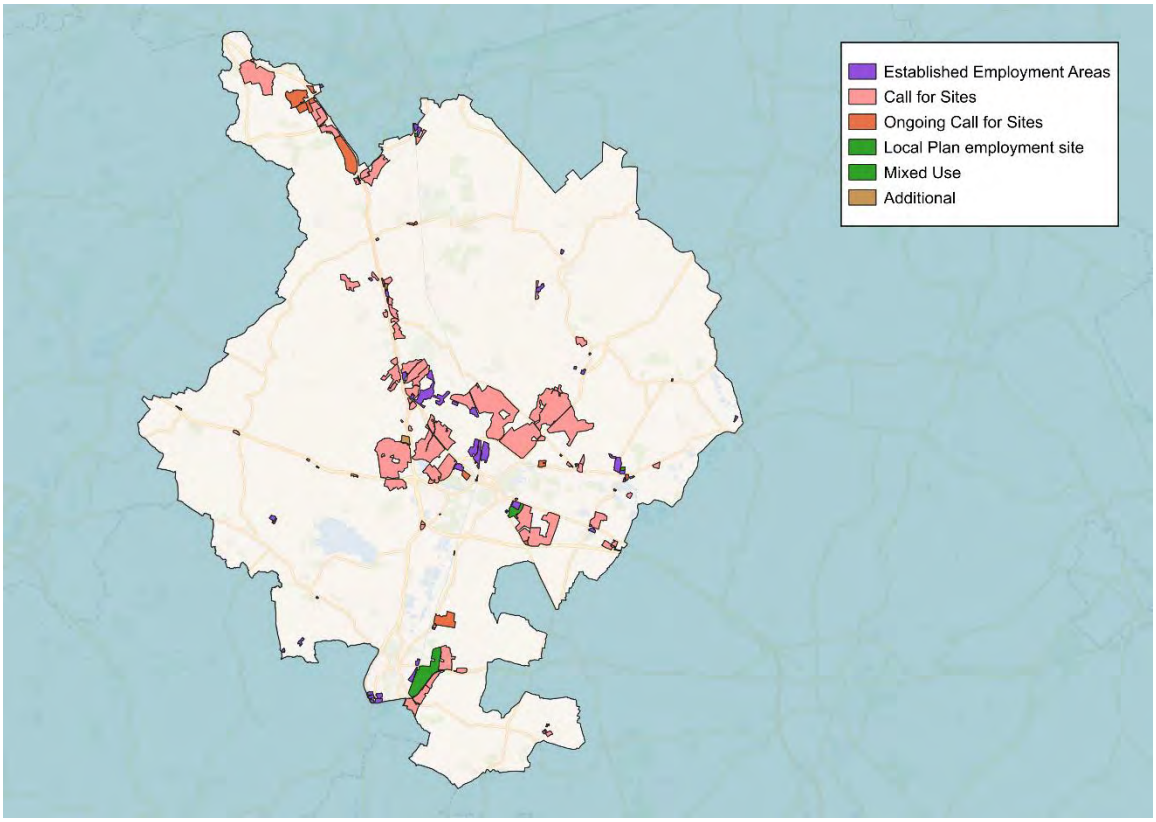
** Available within the policies map.*

Map of sites

10.7 A map showing the extent of land coverage included in the supply assessment is shown in **Figure 10.1**. Further maps which label each of the surveyed sites according to their reference code (used for the purposes of this assessment, are provided in **Appendix A**.

Figure 10.1 – The (potential) supply of employment sites covers a significant proportion of Huntingdonshire's land area

Map of employment sites (supply)



Survey criteria

10.8 A definition of the site survey criteria which the supply of employment sites are appraised against and their rationale for being included in the assessment are shown in **Table 10.2**. It is indicated (*) whether the criteria are assessed in-person in addition to the desk-based survey. The surveys are informed through available existing assessments, data analysis and geographical information system (GIS) investigation and mapping.

Table 10.2 – A range of criteria are included in the surveying in order to characterise each of the sites

Site survey criteria

Criteria	Definition/rationale
Site area	The site area reflects the extent of its land area in hectares.
Site status	The current status of the site reflecting the reason for scoping into the supply assessment.

Criteria	Definition/rationale
Planning status	Details of the planning status including protections applicable to the site.
Cluster typology*	Clusters may be varied in types of employment use or dedicated to specific uses. An indication of the typology is recorded to understand the cluster's function.
Uses*	Employment uses comprising office, research and development, light industrial, general industrial and storage and distribution are scoped in to the EENA. The relative proportions of these uses within the cluster are recorded (derived from CoStar and GIS analysis) to inform later assessments about the appropriate locations for such uses, and understanding of their distribution across the cluster. It is also important to understand whether other uses exist on designated sites, or undesignated sites when considering the compatibility of uses and/or appropriateness of allocations.
Presence of affordable workspace*	Affordable workspace is important for supporting a range of industrial activities including for start-up businesses, the foundational economy, and creative industries. These types of spaces are identifiable through desk-based research, as well as flexible, adaptable, small scale makerspaces. This is supplemented with a review of CoStar data on market rental values.
Recent loss to alternative uses since previous survey*	The presence of other uses on sites may affect their future suitability for employment use(s) and/or demonstrate that they are no longer in viable employment use.
Average age of buildings	The age of buildings acts a proxy indicator of building condition, which itself can help inform on demand and redevelopment potential. This is be supported through analysis of CoStar data.
Apparent quality of buildings	The visible appearance of quality acts as a proxy indicator of building condition, which itself can help inform on demand and redevelopment potential. This is be supported through analysis of CoStar data, which is a building quality scoring system that ranks buildings on a scale of 1 (being the worst quality) and 5 (being the best quality). The rating system provides a consistent benchmark for evaluating a building's design, construction, location, amenities, sustainability, and management. Five-star buildings represent best-in-class assets that are typically landmark developments in prime locations, featuring premium materials, cutting-edge facilities, and top-tier sustainability credentials. One-star properties are usually of poor quality, possibly obsolete, and in need of significant refurbishment.
Parking adequacy*	The availability of parking, depending on the employment use on site, is an indicator of site suitability and the site's interaction with neighbouring uses. Adequacy is appraised using the following broad definitions: • Surplus: there is plenty of parking during a peak time of day which seems disproportionate to the level of employment supported on site. The site could likely support additional employment based on the amount of available parking. • Adequate: the amount of parking seems appropriate to the level of employment supported on site including a small amount of surplus to allow for fluctuations in visitor/customer/employee levels. The site may be able to

Criteria	Definition/rationale
	support additional employment without improvements to the levels of parking available. • Sufficient: the amount of parking seems to accommodate the amount of employees who travel to the site by car although it appears to be at or near capacity during a peak time of day. Improvements might be necessary for the site to support additional employment. • Insufficient: there is not enough parking to support the amount of employees who travel to the site by car, evidenced by parking on nearby streets, inappropriate or unsafe ad hoc parking. Improvements would be immediately necessary to improve conditions.
Loading facilities*	The availability of loading facilities, depending on the employment use on site, is an indicator of site suitability and the site's interaction with neighbouring uses.
Access to road network	Many employment generating uses require access to the road network to facilitate the transportation of goods, as well as for commuting. General industrial and storage and distribution (logistics) uses are particularly dependent on road surfaces which are suitable for heavy goods vehicles (HGVs), with the Strategic Road Network (SRN) and Major Road Network (MRN) playing a role in diverting goods vehicles from residential areas.
Proximity to surrounding land uses*	A key determinant of the suitability of employment sites is the interaction of the on-site activities with neighbouring uses, given the potential for industrial activities to cause nuisance, blight or environmental damage if inappropriately sited. With reference to the Established Employment Areas, the adjacent uses are considered. The assessment of potential future supply finds the nearest sensitive land uses without limitation on distance.
Negative effects on surrounding land uses*	A key determinant of the suitability of employment sites is the interaction of the on-site activities with neighbouring uses, given the potential for industrial activities to cause nuisance, blight or environmental damage if inappropriately sited.
Suitability for 24 hour working*	Some employment uses require, or would benefit from, the ability to operate on a 24-hour basis. A site suitable for 24-hour working typically benefits from unrestricted planning policy, good transport access, and separation from sensitive neighbouring uses such as housing. It should have secure boundaries, adequate lighting, and soundproofing to minimise amenity impacts, particularly noise and light pollution. The site must also support operational needs such as HGV access, staff parking, and welfare facilities for shift workers. Locations within established industrial or logistics clusters are often preferred, as they offer compatibility with surrounding uses and better infrastructure to support continuous operations.
Public transport accessibility	Public transport accessibility is important for supporting commuting. Distance to the nearest public transport stop is provided within the assessment.
Active travel*	Active travel infrastructure is important for supporting commuting, and healthy journeys. The assessment notes where cycle parking and active travel routes on/adjacent to the site are available.

Criteria	Definition/rationale
Sustainability credentials and future capacity*	To respond to the climate emergency, employment sites can help encourage and facilitate more sustainable behaviours, including active travel facilities which promote health and wellbeing. Features may also contribute directly to reducing emissions. The assessment includes reference to the presence of sustainable features within the EEA such as PV panels, EV charging, renewable energy generation, or other beneficial features (e.g. biodiversity installations).
Vacancy	Evidence of vacancy of existing buildings can be indicative of issues of demand. Where unclear, this can be evidenced through reviewing active marketing literature and CoStar building level data. Vacant plots can also indicate the (re-)development/intensification potential of sites. This is indicative of the potential to support employment in future.
Opportunities for redevelopment or intensification*	Redevelopment = is the broad term for improvements and replacements of building stock. Intensification = refers to redevelopment which increases the floorspace of employment space, through densification or stacking.
High level viability challenges*	Where applicable, potential high level viability challenges were qualitatively discussed, as a synthesis of other related criteria such as transport accessibility, fragmentation, as well as consideration of access to labour.
Opportunities for rural diversification*	The rural economy which includes a range of industries including agriculture and tourism, also depends on suitable employment space in appropriate locations. Key challenges around land use change, digital connectivity, and transport and housing will determine the degree to which the rural economy is prosperous and can diversify. Opportunities for diversification were visually identified. As described in paragraph 5.15, diversification activities might include workspace provision through agricultural building conversion, visitor attractions or retail and hospitality offers.
Interactions with new infrastructure*	New infrastructure development can unlock sites or specific uses on them. For example, road upgrades that facilitate more efficient logistics operations or increase the capacity (throughput and/or load) for HGVs might make a site more favourable for certain activities. Similarly, rail upgrades or connections could increase the effective labour market catchment area.
Physical constraints and opportunities for expansion*	Analysis of planning constraints, physical/environmental constraints, as well as land ownership constraints (fragmentation) can indicate opportunities for expansion and redevelopment of sites.
Previous assessments	Conclusions of previous assessments including the Land Availability Assessment relating to suitability could be included here if relevant.
Date and time of survey*	The assessment reflects a snapshot in time.

RAG assessment

10.9 In order to assess each of the sites, a domain-based Red-Amber-Green (RAG) approach is adopted. This is a structured way to assess multi-criteria conditions, such as the overall suitability of existing and potential future supply of employment sites. This assesses the relative performance of the sites within different thematic areas (domains). The assessment of Established Employment Areas and the remaining potential future supply sites are approached in different ways due to the applicability and relevance of the different indicators of the assessment, and to reflect the different future prospects for development. Domains and indicators included are summarised in the applicable discussion below, and a breakdown of how the indicators are scored, weighted and ranked follows in **Appendix B**.

Established Employment Areas

Overview

10.10 There are 37 Established Employment Area sites in this assessment, including Alconbury Enterprise Zone, which have been assessed according to the criteria set out above. Overall, these sites are responsible for hosting approximately 56% of employment floorspace in Huntingdonshire in the use classes included in this study. **Table 10.3** provides an overview of the key indicators relating to these allocated sites. Additional quantitative data pertaining to each EEA is provided, along with site specific mapping, is provided in **Appendix C**.

Table 10.3 – The Established Employment Areas are mostly intensively used

Overview of key indicators for each of the Established Employment Areas

Established Employment Area	Location	Site ID	Size (ha)	Floorspace (m^2)	Average building age (years)	Average building quality (CoStar quality)	Vacant available floorspace (%)
Crossways Distribution Centre	Alconbury Hill	E1	10.2	35,300	27	3.0	1.0%
Minerva Business Park	Alwalton	E2	3.2	9,900	26	2.8	1.1%
Earith Business Park	Earith	E3	4.2	5,600	33	2.3	4.7%
Lakeside Technology Park[172]	Fenstanton	E4	7.6	2,700	5	2.8	6.5%
Sand Road Industrial Estate	Great Gransden	E5	3.3	5,100	51	2.5	0.0%

[172] This site is now known as 'Lakes Business Park'.

Established Employment Area	Location	Site ID	Size (ha)	Floorspace (m^2)	Average building age (years)	Average building quality (CoStar quality)	Vacant available floorspace (%)
Hardwicke Road Industrial Estate	Great Gransden	E6	2.2	7,300	26	2.8	0.0%
Harley Industrial Park	Great Paxton	E7	1.9	2,500	30	2.5	0.0%
Cardinal Park	Godmanchester	E8	18.6	59,200	27	2.9	15.0%
Chord Business Park / Roman Way Centre	Godmanchester	E9	2.3	4,000	32	2.6	0.0%
Upland Industrial Estate	Houghton and Wyton	E10	1.2	700	15	2.3	0.0%
Houghton Hill Industries	Houghton and Wyton	E11	2.6	500	8	2.0	0.0%
Ermine Business Park	Huntingdon	E12	37.1	119,200	26	2.9	24.9%
Hinchingbrooke Business Park	Huntingdon	E13	17.9	34,600	22	2.9	7.0%
St Peter's Road Industrial Area	Huntingdon	E14	45.9	155,100	37	2.8	9.6%
Stukeley Meadows Industrial Estate	Huntingdon	E15	36.4	130,900	38	2.6	5.2%
Bicton Industrial Park / Harvard Industrial Estate	Kimbolton	E16	8.9	15,500	31	2.5	0.0%
The Airfield Industrial Estate	Great Staughton	E17	11.6	4,800	66	2.1	0.0%

Established Employment Area	Location	Site ID	Size (ha)	Floorspace (m^2)	Average building age (years)	Average building quality (CoStar quality)	Vacant available floorspace (%)
Needingworth Industrial Estate[173]	Needingworth	E18	2.9	n/a	n/a	n/a	0.0%
Highlode Industrial Estate	Ramsey	E19	4.3	5,300	36	2.4	0.0%
Upwood Air Park	Ramsey	E20	12.4	27,800	68	3.0	0.0%
Brookside Industrial Estate	Sawtry	E21	3.3	7,000	37	2.4	0.0%
Black Horse Business Park	Sawtry	E22	6.5	14,700	40	3.0	0.0%
West Newlands Industrial Estate	Somersham	E23	1.3	4,600	34	2.7	0.0%
Meadow Lane Business Park	St Ives	E24	1.5	4,800	30	2.5	0.0%
Marley Road Industrial Area	St Ives	E25	6.1	900	26	3.0	0.0%
Parsons Green Business Park	St Ives	E26	2.8	10,400	26	3.3	7.3%
Somersham Road Industrial Area	St Ives	E27	32.3	108,400	39	2.6	0.6%
Compass Point Business Park	St Ives	E28	6.5	17,600	25	2.8	3.0%
Station Road Industrial Area	St Neots	E29	6.9	41,100	41	2.6	0.0%
Cromwell Road Industrial Estate	St Neots	E30	14.9	87,700	51	2.8	0.0%
Colmworth Business Park	St Neots	E31	11.4	43,800	29	3.0	2.2%

[173] There is no CoStar building data within this site boundary reflecting its storage yard function.

Established Employment Area	Location	Site ID	Size (ha)	Floorspace (m^2)	Average building age (years)	Average building quality (CoStar quality)	Vacant available floorspace (%)
Howard Road Industrial Estate	St Neots	E32	11.8	36,100	43	2.6	3.0%
Little End Road Industrial Estate / Alpha Drive Business Park	St Neots	E33	18.9	64,400	43	2.7	1.4%
Warboys Airfield Industrial Estate	Warboys	E34	8.7	26,400	46	2.8	0.0%
Broadway Business Park	Yaxley	E35	8.0	15,600	42	2.6	0.0%
Eagle Business Park	Yaxley	E36	8.7	29,700	6	2.9	0.0%
Alconbury Enterprise Zone	The Stukeleys	EZ1	150.9	95,400	14	3.3	0.5%

Domains for the Established Employment Areas

10.11 The RAG assessment employs the use of four domains which aim to capture the range of conditions and characteristics of the Established Employment Areas to allow for comparison of their relative performance and appropriateness as allocations. The domains selected are:

- **Neighbour interactions and compatibility**: this domain relates to the appropriateness of the site in comparison to neighbouring potentially sensitive land uses, and therefore how compatible the use of the site is;
- **Accessibility and functional suitability**: employment sites require the movement of people and goods as part of their functioning, therefore this domain describes how accessible and suitable the EEA is in that regard;
- **Strategic fit and opportunity**: this domain considers how the ongoing use of the EEA contributes to economic development aspirations and capitalise on new infrastructure; and
- **Physical condition and infrastructure**: this domain considers the physical qualities of the existing employment floorspace.

10.12 The indicators, derived from the surveying exercise, used to determine the performance of the EEA in each domain are presented in **Appendix B**. The rationale for their inclusion against the domain theme is also shown.

Results

10.13 The results of the RAG assessment in each domain is presented in **Table 10.4**. The domain scores, along with the application of professional judgement where necessary, have been combined to reach a conclusion on the overall performance on each of the EEAs. This is influenced heavily by the methodology adopted, and other approaches could reach different overall conclusions. Nonetheless, based on this approach, a suggestion on the possible policy approach to each of the EEAs in future based on synthesis of this information is provided under the categories:

- **Retain allocation**: the EEA is performing well across a range of indicators and its ongoing importance to supporting employment over the Plan update period is compelling;
- **Retain allocation, but consider monitoring**: the EEA continues to be important for supporting employment but performs less well than others in some domains. HDC may wish to consider monitoring the ongoing performance of the EEA over the Plan period with a view to its suitability as an employment allocation; or
- **Consider releasing**: the site potentially is no longer suitable for allocation as an employment site and HDC may wish to consider whether the allocation remains appropriate.

Table 10.4 – The EEAs perform variably when compared against each other

Results of the RAG assessment for existing employment sitesEstablished Employment Area	Location	Site ID	Neighbour interactions and compatibility	Accessibility and functional suitability	Strategic fit and opportunity	Physical condition and infrastructure	Conclusion
Crossways Distribution Centre	Alconbury Hill	E1					Retain allocation
Minerva Business Park	Alwalton	E2					Retain allocation
Earith Business Park	Earith	E3					Retain allocation, but consider monitoring
Lakeside Technology Park	Fenstanton	E4					Retain allocation
Sand Road Industrial Estate	Great Gransden	E5					Retain allocation, but consider monitoring
Hardwicke Road Industrial Estate	Great Gransden	E6					Retain allocation, but

Results of the RAG assessment for existing employment sitesEstablished Employment Area	Location	Site ID	Neighbour interactions and compatibility	Accessibility and functional suitability	Strategic fit and opportunity	Physical condition and infrastructure	Conclusion
							consider monitoring
Harley Industrial Park	Great Paxton	E7					Retain allocation, but consider monitoring
Cardinal Park	Godmanchester	E8					Retain allocation
Chord Business Park / Roman Way Centre	Godmanchester	E9					Retain allocation
Upland Industrial Estate	Houghton and Wyton	E10					Retain allocation, but consider monitoring
Houghton Hill Industries	Houghton and Wyton	E11					Retain allocation, but consider monitoring
Ermine Business Park	Huntingdon	E12					Retain allocation
Hinchingbrooke Business Park	Huntingdon	E13					Retain allocation
St Peter's Road Industrial Area	Huntingdon	E14					Retain allocation
Stukeley Meadows Industrial Estate	Huntingdon	E15					Retain allocation
Bicton Industrial Park / Harvard Industrial Estate	Kimbolton	E16					Retain allocation, but consider monitoring

Results of the RAG assessment for existing employment sitesEstablished Employment Area	Location	Site ID	Neighbour interactions and compatibility	Accessibility and functional suitability	Strategic fit and opportunity	Physical condition and infrastructure	Conclusion
The Airfield Industrial Estate	Great Staughton	E17					Retain allocation
Needingworth Industrial Estate	Needingworth	E18					Retain allocation, but consider monitoring
Highlode Industrial Estate	Ramsey	E19					Retain allocation, but consider monitoring
Upwood Air Park	Ramsey	E20					Retain allocation, but consider monitoring
Brookside Industrial Estate	Sawtry	E21					Retain allocation, but consider monitoring
Black Horse Business Park	Sawtry	E22					Retain allocation
West Newlands Industrial Estate	Somersham	E23					Retain allocation, but consider monitoring
Meadow Lane Business Park	St Ives	E24					Consider releasing[174]
Marley Road Industrial Area	St Ives	E25					Retain allocation

[174] The site is no longer primarily in employment use, with buildings converted to residential properties and healthcare facilities.

Results of the RAG assessment for existing employment sitesEstablished Employment Area	Location	Site ID	Neighbour interactions and compatibility	Accessibility and functional suitability	Strategic fit and opportunity	Physical condition and infrastructure	Conclusion
Parsons Green Business Park	St Ives	E26					Retain allocation
Somersham Road Industrial Area	St Ives	E27					Retain allocation, but consider monitoring
Compass Point Business Park	St Ives	E28					Retain allocation
Station Road Industrial Area	St Neots	E29					Retain allocation
Cromwell Road Industrial Estate	St Neots	E30					Retain allocation
Colmworth Business Park	St Neots	E31					Retain allocation
Howard Road Industrial Estate	St Neots	E32					Retain allocation
Little End Road Industrial Estate / Alpha Drive Business Park	St Neots	E33					Retain allocation, but consider monitoring
Warboys Airfield Industrial Estate	Warboys	E34					Retain allocation
Broadway Business Park	Yaxley	E35					Retain allocation, but consider monitoring
Eagle Business Park	Yaxley	E36					Retain allocation
Alconbury Enterprise Zone	The Stukeleys	EZ1					Retain allocation

Potential future supply

Sites assessed

10.14 A total of 436 sites have been submitted to HDC under the Call for Sites process, along with 68 which came forward during the Ongoing Call for Sites process. Employment allocations (which are not EEAs), and the remaining sites from the overall supply list, are also assessed here. To provide a thorough assessment of the most relevant sites, a sifting exercise was undertaken to review the sites with the potential to deliver this commercial space. The sifting exercise removed submitted sites that:

- Contained commercial uses which were not relevant to the scope of this study; and/or
- Were initially screened out by HDC as unsuitable.

10.15 After this sifting process was completed, 91 sites remained for inclusion in this assessment. **Figure 10.1** presents the sites considered in the assessment. Site numbers correspond to the unique referencing numbers applied by HDC in the Call for Sites process and/or those assigned for the purposes of this report.

Assessment criteria

10.16 The assessment of potential future supply sites has been designed to mirror that for existing sites, although is adapted to reflect that in many cases these sites have not yet come forward for employment use, and therefore have slightly different applicable characteristics. A framework for the site analysis has been developed, ranking sites within three key domains (broadly similar to the existing sites assessment) relevant for the successful delivery of employment floorspace. Each of these factors considers a number of underlying indicators, with an overall ranking provided for each factor on the combined basis of the underlying indicators.

10.17 The domains ranked within the framework, and the considerations making up each of the factors are as follows:

- **Neighbourhood interactions and compatibility**: this domain takes into account the proximity of (potential) future supply locations to sensitive uses whereby activities could result in a negative impact. It also takes into account the proximity of sites to existing development and areas of deprivation where employment opportunities have the potential to result in positive impacts.
- **Accessibility and functional suitability**: this domain assesses how accessible the site is and takes into account how the Land Availability Assessments finds the site to be in terms of suitability, availability, achievability, and deliverability.
- **Strategic fit and opportunity**: this domain measures the potential of the site to capitalise on existing and forthcoming infrastructure projects and economic opportunities for Huntingdonshire.

10.18 For a summary of underlying indicators which comprise these domains, see **Appendix B**.

How these metrics are assessed

10.19 The indicators in the assessment have been designed to be quantifiable using spatial analysis. GIS has been utilised for this purpose. The respective scores against each of the metrics considered are combined to give an overall RAG rating per domain. For a summary of the sources used to assess these metrics, see **Appendix B**.

Results

10.20 The site assessment process results in the following RAG rating for specific sites. A conclusion based on a combination of the ratings and application of professional judgment where necessary is reached, namely either:

- **Strongly consider allocating/safeguarding**: the site performs well across all assessed criteria and is clearly suitable for protection or future allocation as employment land, **subject to consideration of whether there is sufficient demand to justify doing so.** This recommendation is also subject to wider evidence and site-specific constraints, including viability, flood risk, transport impacts, alignment with the growth strategy, and other relevant planning considerations**.**
- **Consider allocating, subject to addressing specific issues:** the site shows good potential overall but has one or more identifiable constraints that must be addressed to make it suitable for allocation.
- **Potential for allocation with further investigation:** the site may have merit but presents mixed or uncertain performance; further technical assessment or evidence is required to determine its suitability.
- **Retain allocation:** where existing allocation/safeguards on the site exist and these protections likely remain suitable.
- **Consider releasing:** where existing allocation/safeguards on the site exist and these protections warrant further review because one or more constraints have been identified**.**

10.21 The overall conclusion should be considered to reflect the balance of merits of each of the sites, rather than a combined policy approach, i.e. the approach to potentially safeguarding further employment land should be tied in magnitude to the preferred scenario, and the choice of specific sites which are identified to meet this need over the Plan period would need to be determined by HDC.

10.22 For a breakdown of the full criteria that supports the RAG ratings, see **Appendix B**.

Table 10.5 – Potential future supply assessment results

Site name	Site ID	Area	Neighbourhood interactions	Accessibility	Strategic fit	Conclusion
Brook Farm	GE1	Grafham and Ellington				Retain allocation
Oakwood Business Park	S1	Sawtry				Strongly consider allocating / safeguarding
Eastern Expansion	SEL2	St Neots				Retain allocation
West of Railway, Brampton Rd, Huntingdon	HU4	Huntingdon				Retain allocation
Park View Garage, Brampton	HU13	Brampton				Retain allocation
Yax Pak, Yaxley	YX2	Yaxley				Retain allocation

Site name	Site ID	Area	Neighbourhood interactions	Accessibility	Strategic fit	Conclusion
South of Bicton Industrial Estate, Kimbolton	KB3	Kimbolton				Consider releasing
Giffords Farm, St Ives	SI3	Holywell-cum-Needingworth				Retain allocation
Bearscroft Farm	HU16	Godmanchester				Consider releasing (removing employment requirement from allocation)
Home Farm South, Abbots Ripton	CfS:259	Abbots Ripton				Potential for allocation with further investigation
Sapley Park Garden Village	CfS:197	Abbots Ripton; Huntingdon; Kings Ripton; The Stukeleys				Consider allocating, subject to addressing specific issues
Land at Potton Road (Rectory Farm), Eynesbury Hardwick, St Neots	CfS:21	Abbotsley				Strongly consider allocating / safeguarding
Land East of Wintringham Park, St Neots	CfS:208	Abbotsley				Strongly consider allocating / safeguarding
Land East of St Neots	CfS:253	Abbotsley				Strongly consider allocating / safeguarding
North of Wintringham Hall, Cambridge Road, St Neots	CfS:278	Abbotsley				Consider allocating, subject to addressing specific issues Consider allocating, subject to addressing specific issues
Land South of Great North Road, Alconbury	CfS:164	Alconbury				Consider allocating, subject to addressing specific issues
Brooklands Farm, land to the East of A1 junction 13, Alconbury	CfS:329	Alconbury				Consider allocating, subject to addressing specific issues
Land North of B1043 and East of Alconbury, Alconbury	CfS:321	Alconbury				Strongly consider allocating / safeguarding

Site name	Site ID	Area	Neighbourhood interactions	Accessibility	Strategic fit	Conclusion
Land at Weybridge Farm (Brampton Cross)	CfS:232	Alconbury; Ellington				Consider allocating, subject to addressing specific issues
Land to the North of the Crossways Distribution Centre, Alconbury Hill	CfS:327	Alconbury Weston				Strongly consider allocating / safeguarding
Safefield Farm, North West of Alconbury Airfield	CfS:43	Alconbury Weston; Upton and Coppingfford; The Stukeleys				Strongly consider allocating / safeguarding
Area 4 Park Farm, Brampton	CfS:226	Brampton				Consider allocating, subject to addressing specific issues
Land North of A141, South of Brampton racecourse, Brampton	CfS:343	Brampton				Strongly consider allocating / safeguarding
Land at Low Harthay and Woodhatch Farms (smaller site), Brampton	CfS:140	Brampton; Ellington				Consider allocating, subject to addressing specific issues
Land at Low Harthay and Woodhatch Farms (larger site), Brampton	CfS:44	Brampton; Ellington				Consider allocating, subject to addressing specific issues
Area 3 Park Farm, Brampton	CfS:225	Brampton				Consider allocating, subject to addressing specific issues
Land South West Of Old Toll Bar House Toll Bar Lane, Keyston	CfS:158	Bythorn and Keyston				Potential for allocation with further investigation
Land South of A14, Catworth	CfS:63	Catworth				Potential for allocation with further investigation
Land West of A1 (North of Peterborough Motorway Services) - Option A, (larger site) Haddon	CfS:209	Chesterton; Haddon				Strongly consider allocating / safeguarding

Site name	Site ID	Area	Neighbourhood interactions	Accessibility	Strategic fit	Conclusion
Land at Woolpack Farm, Conington	CfS:381	Conington				Consider allocating, subject to addressing specific issues
Galley Hill, Fenstanton	CfS:46	Fenstanton				Strongly consider allocating / safeguarding
Land off Conington Road, Fenstanton	CfS:265	Fenstanton				Consider allocating, subject to addressing specific issues
Land adjacent A1 at Norman Cross, Folksworth	CfS:130	Folksworth and Washingley				Consider allocating, subject to addressing specific issues
Emmanuel Knoll Village	CfS:207	Godmanchester				Consider allocating, subject to addressing specific issues
Land South of Caxton Road, Great Gransden	CfS:202	Great Gransden				Potential for allocation with further investigation
Land at Sand Road, Great Gransden	CfS:297	Great Gransden				Potential for allocation with further investigation
Land North of Harley Industrial Park, Paxton Hill, Great Paxton	CfS:302	Great Paxton				Consider allocating, subject to addressing specific issues
Brook Farmyard (central site), Great Staughton	CfS:373	Great Staughton				Potential for allocation with further investigation
Brook Farmyard (with eastern expansion), Great Staughton	CfS:374	Great Staughton				Potential for allocation with further investigation
Brook Farmyard (with western expansion), Great Staughton	CfS:375	Great Staughton				Potential for allocation with further investigation
Land West of A1 (North of Peterborough Motorway Services) - Option B (smaller site), Haddon	CfS:206	Haddon; Chesterton				Strongly consider allocating / safeguarding
Land at A1 West (South) - South of Peterborough Motorway Services, Haddon	CfS:212	Haddon				Strongly consider allocating / safeguarding

Site name	Site ID	Area	Neighbourhood interactions	Accessibility	Strategic fit	Conclusion
The Lattenburys (land to the South of the A1307 and North of A14, and West of A1198)	CfS:247	Hemingford Abbots; Godmanchester				Consider allocating, subject to addressing specific issues
Land North of Bluntisham Road, Needingworth	CfS:185	Holywell-cum-Needingworth				Consider allocating, subject to addressing specific issues
Tir na Nog, Sawtry Way, Houghton	CfS:90	Houghton and Wyton				Strongly consider allocating / safeguarding
Land at New Manor Farm, Houghton and Wyton	CfS:196	Houghton and Wyton				Strongly consider allocating / safeguarding
Land South East of Bicton Industrial Estate Kimbolton	CfS:365	Kimbolton				Potential for allocation with further investigation
Land North of Station Lane, Offord Cluny	CfS:308	Offord Cluny and Offord D'Arcy				Consider allocating, subject to addressing specific issues
Land to the West of Toll Bar Way and North of Whitehall Farm, Sawtry	CfS:338	Sawtry				Consider allocating, subject to addressing specific issues
Land Southwest of B1090 and East of Stangate Hill B1043 (larger site), Sawtry	CfS:15	Sawtry				Consider allocating, subject to addressing specific issues
Land Southwest of B1090 and East of Stangate Hill B1043 (smaller site), Sawtry	CfS:384	Sawtry				Consider allocating, subject to addressing specific issues
Land East of B1043 and East of Keeper's Cottage, Sawtry	CfS:335	Sawtry				Consider allocating, subject to addressing specific issues
Land at Brickyard Farm, Sawtry	CfS:76	Sawtry				Consider allocating, subject to addressing specific issues

Site name	Site ID	Area	Neighbourhood interactions	Accessibility	Strategic fit	Conclusion
Land to the North East of the Brookside Industrial Estate, Sawtry	CfS:169	Sawtry				Consider allocating, subject to addressing specific issues
Land at Little Common Farm, Sawtry	CfS:380	Sawtry				Consider allocating, subject to addressing specific issues
Land North of Black Horse Industrial Estate (smaller site), Sawtry	CfS:385	Sawtry				Consider allocating, subject to addressing specific issues
Sibson Garden Community	CfS:348	Sibson-cum-Stibbington; Water Newton				Strongly consider allocating / safeguarding
Land at Thrapston Road, Spaldwick	CfS:86	Spaldwick				Potential for allocation with further investigation
Land North of Meadow Lane, St Ives	CfS:110	St Ives				Consider allocating, subject to addressing specific issues
Land North East of Wintringham, St Neots	CfS:362	St Neots				Strongly consider allocating / safeguarding
Land East of Loves Farm (Tithe Farm Extension), St Neots	CfS:16	St Neots; Abbotsley				Strongly consider allocating / safeguarding
Nook Farm, Little Stukeley	CfS:36	The Stukeleys				Consider allocating, subject to addressing specific issues
Land North of A141, between Huntingdon Racecourse and A1307	CfS:221	The Stukeleys				Strongly consider allocating / safeguarding
RAF Upwood - Phase 4, Upwood	CfS:82	Upwood and The Raveleys				Potential for allocation with further investigation

Site name	Site ID	Area	Neighbourhood interactions	Accessibility	Strategic fit	Conclusion
Huntingdon Racecourse	CfS:276	The Stukeleys				Consider allocating, subject to addressing specific issues
Land rear of 51 Church Road, Warboys	CfS:133	Warboys				Consider allocating, subject to addressing specific issues
Land at Ramsey Road, Warboys	CfS:293	Warboys				Potential for allocation with further investigation
Wyton Airfield	CfS:95	Wyton-on-the-Hill				Consider allocating, subject to addressing specific issues
Hungary Hall, West of A141, Wyton-on-the Hill	CfS:47	Wyton-on-the-Hill				Strongly consider allocating / safeguarding
Lodge Farm, North of A141, Huntingdon (Wyton on the Hill)	CfS:256	Wyton-on-the-Hill; Huntingdon				Strongly consider allocating / safeguarding
Land North of Houghton Road (southern portion), St Ives (Wyton on the Hill)	CfS:263	Wyton-on-the-Hill				Consider allocating, subject to addressing specific issues
Land to the North of Houghton Road (larger site), St Ives	CfS:198	Wyton-on-the-Hill				Consider allocating, subject to addressing specific issues
Eagle Business Park, Phase 3, Yaxley	CfS:18	Yaxley				Strongly consider allocating / safeguarding
Land South West of Yaxley and East of A1(M) near Norman Cross	CfS:126	Yaxley				Strongly consider allocating / safeguarding
Chesterton Garden Village	CfS23-2414	Chesterton				Strongly consider allocating / safeguarding
Land to North of Station Road, Holme	CfS23-243	Holme				Potential for allocation with further investigation
South of Station Road, Holme	CfS23-244	Holme				Potential for allocation with further investigation

Site name	Site ID	Area	Neighbourhood interactions	Accessibility	Strategic fit	Conclusion
Land West of A1(M) between junctions 16 and 17, and South of Haddon Road	CfS23-2415	Haddon; Morborne; Folksworth & Washingley				Strongly consider allocating / safeguarding
Land South of the A14, Spaldwick (modest employment)	CfS23-24285	Spaldwick				Potential for allocation with further investigation
Land East of Cow Lane, Godmanchester	CfS23-24265	Godmanchester				Consider allocating, subject to addressing specific issues
Land at Station Road, St Neots	CfS23-24125	St Neots				Strongly consider allocating / safeguarding
Land off Old North Road, Sawtry	CfS23-24188	Sawtry				Consider allocating, subject to addressing specific issues
Hinchingbrooke Hospital site, Hinchingbrooke Park Road, Huntingdon	CfS23-24288	Huntingdon				Consider allocating, subject to addressing specific issues
Land between Dobbies Garden Centre and Splash Lane, Wyton	CfS23-24264	Houghton and Wyton				Strongly consider allocating / safeguarding
Former Motorway Compound Site, North of A1198 roundabout	CfS23-24295	Godmanchester				Consider allocating, subject to addressing specific issues
Five Acres Farm, South of Needingworth Road	CfS23-24306	Holywell-cum-Needingworth				Consider allocating, subject to addressing specific issues
Land to the East of Paxton Hill, Great Paxton	CfS23-24314	Great Paxton				Potential for allocation with further investigation
Land North Of 23 To 33 Oundle Road, Alwalton (larger site)	CfS23-24298	Alwalton				Strongly consider allocating / safeguarding

Site name	Site ID	Area	Neighbourhood interactions	Accessibility	Strategic fit	Conclusion
Bottom Lodge Farm / Land at A1 West (North)	CfS23-24296	Chesterton; Haddon				Strongly consider allocating / safeguarding
Woolley Road	C1	Alconbury				Consider allocating, subject to addressing specific issues

11. Impact of infrastructure

11.1 Infrastructure projects, both existing/commenced and future (committed) aspirations, have the potential to influence economic and employment needs in Huntingdonshire over the Plan period. If fully implemented, they could improve access to employment opportunities, influence effective labour market catchment areas, unlock development sites, and attract inward investment. In the following discussion, qualitative speculations on how employment needs could be influenced by such projects are made, structured around a Strengths-Weaknesses-Opportunities-Threats (SWOT) analysis framework. Firstly, existing/commenced projects are discussed, namely:

- A14 Cambridge to Huntingdon Improvement Scheme (completed); and
- A428 Black Cat to Caxton Gibbet improvements (underway).

11.2 This is followed by discussion about speculative or potential future projects in the pipeline or being explored, including:

- East West Rail;
- Fens Reservoir;
- A141 Huntingdon and St Ives Improvement Scheme;
- Rail infrastructure improvements;
- Energy infrastructure (power grid, renewables and EV charging);
- Digital infrastructure; and
- Social infrastructure.

Existing/commenced infrastructure and major projects

A14 Cambridge to Huntingdon Improvement Scheme

11.3 The A14 Cambridge to Huntingdon Improvement Scheme was one of the UK's most significant highway infrastructure projects in recent years. Completed June 2022, the £1.5 billion project upgraded miles of the A14, which is a key east-west freight and commuter corridor connecting the Midlands to the East of England and the Port of Felixstowe. The scheme included a new 12-mile bypass south of Huntingdon, widening of existing sections of the A14 and A1, major junction reconstructions, and the decommissioning of the historic A14 viaduct through Huntingdon .[175]

11.4 This project has dramatically improved connectivity between Huntingdonshire, Cambridge, and the broader region. Huntingdonshire's towns, particularly Huntingdon and Godmanchester have benefitted from shorter journey times (with up to 20 minutes of savings), and better reliability for commuting and logistics. The improved corridor is crucial for the local economy, enabling Huntingdonshire to integrate more effectively into the OxCam Arc and to accommodate new commercial and residential growth without overloading the local road network.

11.5 From an employment perspective, the scheme supports local economic development by unlocking land for employment use (especially at Alconbury Weald), improving freight efficiency for logistics and manufacturing

[175] National Highways, 2025. A14 Cambridge to Huntingdon. Retrieved from: https://nationalhighways.co.uk/our-roads/east/a14-cambridge-to-huntingdon/. [Accessed May 2025].

firms, and enhancing labour market access for both workers and employers. During construction, the scheme supported thousands of direct and indirect jobs and helped establish digital construction best practice, providing upskilling and supply chain opportunities in the region.[176]

A428 Black Cat to Caxton Gibbet improvements

11.6 The A428 Black Cat to Caxton Gibbet scheme is a major road upgrade project converting a congested single-carriageway stretch of the A428 into a modern dual carriageway. It runs for 10 miles from the Black Cat roundabout (A1 junction in Bedfordshire) to Caxton Gibbet (west of Cambourne, Cambridgeshire), filling the last gap in the high capacity route between Cambridge and the M1.[177]

11.7 This upgrade directly impacts the south-west edge of Huntingdonshire around St Neots and the A1/A428 intersection. While the new road alignment lies mostly in Bedfordshire and South Cambridgeshire, Huntingdonshire residents use the A428 and A1 for east-west and north-south travel. St Neots, the largest town in Huntingdonshire, is just north of the Black Cat junction and will benefit from improved connectivity and reduced diversion through local roads when trying to avoid traffic. The A1 corridor through Huntingdonshire (from St Neots up to Alconbury) will see changes as the Black Cat junction becomes free-flowing, alleviating tailbacks on the A1 that spilled over into Huntingdonshire's network.

11.8 The scheme will significantly cut travel times and improve reliability between Huntingdonshire and key destinations: Cambridge, Bedford/Milton Keynes, and the Midlands. National Highways estimates up to 1.5 hours saved per week for regular commuters and journey time reductions of up to one-third.[178] For Huntingdonshire businesses, this means better road freight efficiency and access to a larger labour market (commuters can more easily live in Huntingdonshire and work in Cambridge and Milton Keynes, or vice versa).

11.9 The A428 upgrade is also expected to unlock economic growth in this fast-growing corridor. For Huntingdonshire, that could translate into higher demand for commercial land (e.g. logistics parks, light industrial estates near St Neots and along the A1/A14, which will all have improved connectivity). Employment patterns may also shift, for example St Neots could see more out-commuting to Cambridge (as commute times drop), but also potentially attract employers who want a location equidistant between Cambridge and Milton Keynes with great road links. Land demand for housing in St Neots and surrounding villages may rise given the enhanced accessibility.

11.10 The logistics sector is a major beneficiary given a continuous dual carriageway from the M1 to the Cambridge tech cluster makes Huntingdonshire more attractive for warehouses and regional distribution centres (especially near the A1/A14 junction at Alconbury or along the A1). Manufacturing and agri-food businesses that rely on distribution (many in Huntingdonshire's industrial estates) will gain from more reliable delivery times. The technology and office sectors in Cambridge and Bedford could see Huntingdonshire residents more willing to commute.

[176] National Highways, 2025. A14 Cambridge to Huntingdon. Retrieved from: A14 Cambridge to Huntingdon - National Highways [Accessed June 2025]

[177] National Highways, 2025. A428 Black Cat to Caxton Gibbet. Retrieved from: https://nationalhighways.co.uk/our-roads/a428-black-cat-to-caxton-gibbet/ [Accessed May 2025].

[178] Skanska, 2025. A428 Black Cat to Caxton Gibbet Improvements Scheme. Retrieved from: https://group.skanska.com/projects/254858/A428-Black-Cat-to-Caxton-Gibbet-Improvements-Scheme [Accessed May 2025].

Pipeline of infrastructure and major projects

East West Rail

11.11 East West Rail (EWR) is a major new rail link planned between Oxford and Cambridge, with a central section from Bedford to Cambridge currently in development. A key element is a new interchange station at Tempsford (Bedfordshire) where EWR will intersect the East Coast Main Line (ECML). While the new Tempsford Station lies just outside Huntingdonshire, it directly borders the St Neots area in southwest Huntingdonshire. The ECML runs through Huntingdonshire (serving St Neots and Huntingdon stations), so an interchange at Tempsford will influence commuter flows and connectivity for the towns' residents. The project also enables the development of a proposed large new market town at Tempsford just south of Huntingdonshire's boundary, which could spill economic benefits and housing demand into nearby parts of Huntingdonshire (especially St Neots and surrounding villages).

11.12 Improved rail accessibility may alter employment patterns, for example by enabling Huntingdonshire residents to take jobs elsewhere in the OxCam Arc or attract new employers whose workforce require or prefer rail accessibility. Land demand around St Neots and south Huntingdonshire could rise for both housing and commercial uses, as EWR and Tempsford station make the area more attractive for commuters and investors. The corridor is envisioned as 'Europe's Silicon Valley', meaning that Huntingdonshire's business parks and industrial sites (e.g. at Alconbury Weald) may see increased interest, particularly from tech and R&D firms seeking mid-point locations in the Arc.

11.13 East West Rail's Connection Stage 1, covering Oxford to Bletchley, includes an already operational Oxford–Bicester section (completed in 2016) and a nearly finished Bicester–Bletchley link, with passenger services expected to begin in 2025.[179] Stages 2 and 3, extending to Bedford and Cambridge, remain in planning and await final government approval and funding. The Chancellor's Spring Budget confirmed accelerated works on the Marston Vale Line to enable hourly Oxford–Bedford services by 2030.

Fens Reservoir

11.14 The Fens Reservoir is a proposed large-scale water reservoir to be built between Chatteris and March in the Cambridgeshire Fens.[180] Jointly promoted by Anglian Water and Cambridge Water, this reservoir (one of two new regional reservoirs) is designed to secure water supply for the East of England. Delivery is currently in the pipeline stage and the project is advancing through statutory planning (as a Nationally Significant Infrastructure Project requiring a DCO). Subject to the consultation and planning process, construction of the reservoir could begin in 2029, with plans for it to open to the public between 2039 and 2041.[181]

11.15 Although the reservoir site is just north-east of Huntingdonshire (in Fenland district), it serves the Cambridge Water supply zone, which overlaps with parts of Huntingdonshire. Northern and eastern Huntingdonshire communities (e.g. around St Ives and Ramsey) that rely on the regional water network will benefit from the increased water availability.[182] Indirectly, all growth areas in Huntingdonshire depend on regional water

[179] East West Rail, 2025. Project overview. Retrieved from: https://eastwestrail.co.uk/about-us/project-overview [Accessed June 2025].

[180] Anglian Water/Cambridge Water, 2024. A proposed reservoir in the Fens. Phase two consultation – main site design brochure.

[181] Fenland District Council, 2025. Fens Reservoir. Retrieved from: https://www.fenland.gov.uk/article/17350/Fens-Reservoir [Accessed June 2025].

[182] Cambridge Water, 2025. About us. Retrieved from: https://www.cambridge-water.co.uk/about-us/ [Accessed May 2025].

capacity which require sufficient potable water and wastewater capacity. The reservoir's location near the Huntingdonshire border also means potential recreational or environmental spillovers (the reservoir could become a leisure destination drawing visitors to/from Huntingdonshire, similar to Grafham Water in west Huntingdonshire).

11.16 Water supply constraints have been a limiting factor for housing and employment growth in the Cambridge sub-region.[183] By providing a major new source of raw water (filled by winter flows from rivers), the Fens Reservoir will unlock development that was stalled by water shortages. This directly impacts land demand as with a secure water supply, local authorities can be more confident in approving new housing or business parks. Additionally, a reliable water source future-proofs existing industries (agriculture, food processing in the Fens, high-tech firms in Cambridge Science Park, etc.) against droughts. The reservoir also entails significant construction activity likely creating jobs and supply chain opportunities accessible to Huntingdonshire contractors.

A141 Huntingdon and St Ives Improvement Scheme

11.17 The A141 Improvement Scheme is a proposed comprehensive upgrade of the A141 corridor around Huntingdon and St Ives in north-west Huntingdonshire. The A141 is a primary local route looping from the A14 at Huntingdon, through suburbs and rural edges (including a crossing of the River Great Ouse), and onward to Chatteris. It currently suffers from severe peak congestion, safety issues, and limited alternatives for local travel.[184] Options being considered include a new northern bypass of Huntingdon, junction upgrades, and enhanced routes into St Ives. The project is not yet funded for construction.

11.18 Rural villages like Broughton or Needingworth which experience congestion due to drivers avoiding A141 jams could see relief. The scheme may also unlock development at RAF Wyton which lies between Huntingdon and St Ives; previously, a large housing development at Wyton was considered undeliverable partly due to lack of road capacity.

11.19 If delivered, the A141 improvements would improve commute times and impart better access to the SRN, effectively broadening labour catchment areas. The primary beneficiaries are local businesses and communities rather than any single sector.

Rail infrastructure improvements

11.20 In addition to East West Rail, Huntingdonshire's economic outlook is influenced by broader rail infrastructure enhancements on existing lines. Key among these are improvements to the East Coast Main Line (ECML), which runs north-south through Huntingdonshire (serving St Neots and Huntingdon stations), and the Ely Area Capacity Enhancement (EACE) in east Cambridgeshire. The ECML has been undergoing upgrades: recent programmes included power supply upgrades to support new electric trains, digital signalling (ETCS) and other enhancements and track upgrades.[185]

11.21 Huntingdonshire lies on the ECML, so any improvements there (such as signalling or capacity upgrades) directly affect rail service frequency and reliability for Huntingdon and St Neots. Upgrades on the ECML improve accessibility and offer faster journey times to London and the North. This makes Huntingdonshire more attractive for commuters (people can live in the relatively more affordable Huntingdonshire area and

[183] Ministry of Housing, Communities and Local Government/Department for Environment, Food and Rural Affairs/Department for Levelling Up, Housing and Communities, 2024. Addressing water scarcity in Greater Cambridge: update on government measures.

[184] Cambridgeshire County Council/CPCA/HDC. A141 and St Ives Improvements Scheme.

[185] Network Rail, 2024. ECML track renewals 2024.

work in London or Peterborough within a reasonable commute). The effect of this is potentially boosted residential demand in towns with stations. For employers in Huntingdonshire, better rail means a larger talent pool and effective labour market catchment.

11.22 The combined rail improvements support land demand around stations, and potentially encourage transit-oriented development near Huntingdon station (offices or high-density housing become more viable with better rail service). They also strengthen the case for any future station proposals in Huntingdonshire (such as a possible Alconbury rail station, which continues to remain a possibility).[186] A station at Alconbury would likely increase interest in bringing forward employment uses (such as office) that rely on rail connectivity.

Energy infrastructure (power grid, renewables and EV charging)

11.23 The energy infrastructure in Huntingdonshire encompasses the electricity grid (transmission and distribution), as well as growing needs for accommodating renewable energy projects and electric vehicle (EV) charging. The area's grid is managed by UK Power Networks (distribution) and National Grid (transmission lines crossing the region). With rapid growth and electrification (EVs, electric heating), the existing grid capacity in some locations is becoming constrained, evidenced as new developments often require substation upgrades. There are also several proposed Nationally Significant Infrastructure Project (NSIP) renewable energy schemes in the broader region.

11.24 Industrial areas and new developments are most affected by grid capacity. For example, the Alconbury Weald development needed a substantial power supply and a new primary substation was constructed there. If grid upgrades lag, places like St Neots Eastern expansion or Huntingdon's new business parks might face delays connecting or limitations (e.g. inability to install high-capacity electric heat or charge hubs without costly reinforcement). Rural parts of Huntingdonshire with smaller cables might encounter difficulty if a large employer or a cluster of EV chargers is proposed.

11.25 Grid upgrades are essential for enabling new employment sites (most businesses need significant power, especially tech and manufacturing). If the grid is weak, investors might shy away or face higher costs (some companies have reported multi-year waits for power connections in parts of UK). So, a stronger grid in Huntingdonshire means it can accommodate energy-intensive industries or data centres (which require huge amounts of power).

11.26 High-tech manufacturing and R&D often have high power needs (for labs, cleanrooms). Huntingdonshire would be better positioned to host them (like a semiconductor facility or advanced manufacturing plant) if grid capacity is ample. The burgeoning data centre sector is looking for sites and these demand huge electricity (tens of MW per site) and fibre connectivity. Huntingdonshire, with relatively cheaper land than Cambridge and proximity to trunk fibre routes (along rail/A14 corridors) could attract data centres if the grid can supply the load. An Infrastructure Delivery Study is being prepared to support the Local Plan review, which will include an assessment of infrastructure needs.

Digital infrastructure

11.27 Huntingdonshire's digital infrastructure is rapidly evolving with the rollout of full-fibre broadband (FTTP) and 5G mobile networks, as well as interest in developing data centres in the wider region. The Connecting Cambridgeshire programme, along with Project Gigabit[187], is driving gigabit broadband coverage. Project

[186] UK Parliament, 2025. Railway Stations: Alconbury Weald. Question for Department for Transport UIN34050.

[187] Building Digital UK, 2024. Project Gigabit.

Gigabit (awarded to CityFibre) will extend full-fibre to approximately 45,000 rural premises across Cambridgeshire by 2025, including villages around Huntingdon.[188] Meanwhile, mobile operators have been deploying 5G. By 2023, over 90% of Huntingdonshire's area had 5G coverage by at least one operator.[189]

11.28 Rural communities and business parks previously with slow internet will be transformed by full-fibre, for example in villages in northern Huntingdonshire, which would allow home-based businesses to be more feasible.

11.29 Data centre developments would not likely come forward in town centres although could be possible in adjacent sites with good fibre and power. If a large data cluster emerges, it could physically affect the location in which it is hosted through the introduction of new large buildings, although the employment intensity is not considered to be as advantageous as the unlocking of business opportunities (through reduction in latency periods that locating near to such centres offers).

Social infrastructure

11.30 Social and institutional infrastructure, comprising schools, colleges, hospitals and other research/higher education providers are enablers of economic growth. Education infrastructure in Huntingdonshire is growing as additional facilities are being built to support population growth as part of new housing development. Healthcare infrastructure includes the main district hospital (Hinchingbrooke Hospital in Huntingdon) and smaller health centres. A major development is the planned rebuilding of Hinchingbrooke Hospital which has been prioritised in the national New Hospitals Programme (wave 1) due to structural issues, with construction expected around 2027–2028.[190] This effectively will deliver a new hospital facility on the existing site, modernising capacity for the next decades, and presenting opportunities for co-location of research and/or employment uses, particularly within the life science sector. In terms of research institutions, Huntingdonshire is located within the wider research ecosystem of Cambridgeshire, and increasingly Peterborough, which creates opportunities for collaboration and spillover into Huntingdonshire's economy.

Universal Studios Bedford

11.31 Universal Destinations & Experiences is proposing a major new theme park and resort near Bedford, which would be its first branded park in Europe. The 700-acre site, situated just south of Bedford town centre and approximately 12 miles from Huntingdonshire's boundary, presents significant strategic implications for the wider region. If delivered, the resort would host millions of visitors annually and create a new economic anchor within the Oxford-Cambridge Arc. With fast access to rail and road networks, the site benefits from strong connectivity to London and the rest of the UK. East West Rail, including a proposed new station near the resort, will further improve accessibility and strengthen ties to Cambridge, Bedford, and Oxford, potentially influencing settlement and employment patterns in southern Huntingdonshire.

11.32 The resort is expected to create 8,000 jobs at opening, rising to 10,000 over two decades. An estimated 75 percent of employees would be drawn from Bedford, Central Bedfordshire, Luton, and Milton Keynes, but the proximity of St Neots and other parts of Huntingdonshire means that labour market effects are likely to extend across district boundaries. In addition to direct jobs, a further 20,000 indirect and induced jobs could be supported through the supply chain, tourism, and business services. During construction, the workforce is expected to peak at around 5,000, generating demand for accommodation, services, and materials.

[188] Building Digital UK, 2023. Major broadband rollout to benefit 45,000 rural homes and businesses.

[189] Ofcom, 2024. 5G coverage.

[190] North West Anglia NHS Foundation Trust, 2025. Project to build a new Hinchingbrooke Hospital confirmed.

Universal has indicated it will prioritise local employment, procurement, and community partnerships, drawing on successful models from other resorts in the United States and Asia.

11.33 The infrastructure upgrades linked to the project, including new slip roads from the A421, active travel improvements, and the delivery of Wixams (a new station which will serve the new housing development as well as visitors to the resort adjacent) and East West Rail stations, will improve accessibility and could stimulate new development. These changes are likely to increase housing and land demand in south-west Huntingdonshire, particularly around St Neots. Visitor spending may also benefit the local tourism and hospitality sectors, and the resort's demand for creative, digital and hospitality skills could stimulate further investment in training and education. However, there are risks, including workforce pressures in already tight labour markets and dependencies on wider transport schemes being delivered on time. Strategic planning across local authorities will be essential to manage commuting flows, growth pressures, and the long-term integration of the park into the regional economy.

Assessment of impact of infrastructure on employment needs

SWOT analysis

Table 111.11 SWOT analysis of impact of infrastructure on employment needs

Infrastructure	Strengths	Weaknesses	Opportunities	Threats
A14 Cambridge to Huntingdon Improvement Scheme (completed)	• Strategic east-west connectivity creates a high-capacity corridor between the Midlands and East Anglia, strengthening Huntingdonshire's central position within supply chains traversing this route • Diversion of high volumes of through traffic from Huntingdon creates a more attractive town • Enhances access to strategic growth locations • Journey time savings and reliability gains for commuters and logistics firms	• Prioritisation of vehicular traffic without transformational active travel or public transport enhancements • Disruptions to businesses during construction, although this has now alleviated • Potential minor reductions in incidental economic activity	• Improved viability of large strategic employment sites by resolving transport constraints • Conditions for expansion in logistics firms, especially at key interchanges • Reduced congestion improves punctuality and operating efficiency for local businesses, especially in construction, trades, delivery services, and manufacturing	• Improved capacity may eventually lead to increased car dependency, congestion, and emissions, particularly if parallel investment in public transport is not made • As a major road scheme, it sits uneasily alongside decarbonisation targets and may be viewed as contributing to undermining long-term net-zero strategies • Increased land values around improved junctions could be captured by private developers without mechanisms in place for reinvestment in infrastructure or affordable housing
A428 Black Cat to Caxton Gibbet Improvement (underway)	• Closes the only remaining single-carriageway gap between Cambridge and the M1 • Improves journey times and safety	• Land take and environmental footprint • Construction works disruption to businesses • Risk of induced traffic demand that road upgrades sometimes cause	• Provides an economic development boost by potentially unlocking sites for commercial or residential development • Shorter commutes mean additional job opportunities	• Delays to programme and benefits • Displacement of pressure points

Infrastructure	Strengths	Weaknesses	Opportunities	Threats
	• Completion expected by 2027 • Enhances network resilience with better alternative east-west route	• Prioritises long-distance travel	within same commute durations • Complementary road capacity to other infrastructure projects (e.g. EWR)	
East West Rail	• Strong government commitment and funding confirmed • Strategic location at Tempsford potentially connects EWR with ECML, enhancing regional network connectivity • Travel time reductions • Key enabler of OxCam arc vision, supporting planned new communities	• Will not be operational until at least the early 2030s • Localised disruption that could temporarily inhibit local businesses • Located outside of local authority boundary, necessitating good last-mile links for benefits coming forward in Huntingdonshire to be encouraged	• Encourages new housing and commercial development along the route such as new sustainable urban extensions and garden villages • Better access to Cambridge and Oxford's job markets could reduce skills leakage and attract highly productive commuters • Future potential for interchange hub for passengers or freight	• Delay or funding shortfall risk if political priorities change or costs escalate, EWR central section could be postponed, undermining growth plans reliant on it • Concerns about flood risk, biodiversity and loss of rural character (especially around Tempsford and route villages) could lead to legal challenges or requirements that slow the project • Uneven economic benefits for Huntingdonshire favouring southern and better connected locations • Displacement of investment from town centres
Fens Reservoir	• Secures long-term water supply for Cambridge and surrounding districts, removing a critical barrier to	• High costs and long construction period[192] • Local disruption affecting agricultural land and infrastructure • Location outside of Huntingdonshire could mean	• Unlocks housing and employment sites that were on hold due to water constraints • Economic effects for nearby towns such as Ramsey	• Planning and approval delays extending delivery timeline • Uncertainty around effectiveness if climate change significantly alters rainfall patterns

[192] Ofwat, 2023. Updated Strategic ResourceOption (SRO) Information from RAPID Gate Two Draft Decisions.

Infrastructure	Strengths	Weaknesses	Opportunities	Threats
	housing and economic growth[191] • Enables reduction of unsustainable groundwater abstraction • Large-scale project which could be designed with multiple additional uses (tourism) in mind	benefits are not guaranteed to accrue within the district	through visitor spend if created as a regional park • Improved water resilience for business (food processing, high-tech cooling)	• Complacency in water efficiency
A141 Huntingdon and St Ives Improvement Scheme	• Would address a known congestion and safety problem • Policy support[193] • Diverting traffic flows from town centres	• At early planning with no committed funding • Potential for high costs if bridge(s) required • Potential to displace traffic issues • Could reinforce car dependency	• Enables large scale development at key sites such as RAF Wyton, which would unlock employment opportunities if employment land is brought forward • Integration with other transport modes (active travel, public transport) • Better connectivity could raise local land values	• Local opposition could delay or prevent delivery • Continued or worsening congestion could deter further investment • Competition for funding from other major projects
Rail infrastructure improvements	• ECML upgrades bring faster, more frequent services: new signaling and track improvements allow more trains and reduced London–Edinburgh journey times[194] • Modal shift and environmental benefits: taken together, these rail projects reduce	• Much of the ECML upgrade work south of Peterborough is complete; any further capacity increase (e.g. additional tracks or station expansions) could face diminishing returns or very high costs • Impacts during construction/upgrade: past	• Unlocks new rail service possibilities improving intra-regional connectivity (this could create new economic interactions along the A14/rail corridor) • More freight on rail opens opportunity for a rail freight hub in or near	• Over-reliance on improved rail: if anticipated service increases don't materialize (e.g. if franchise changes or operational issues prevent extra trains stopping at Hunts stations), local plans that assumed better rail links could falter

[191] MHCLG, 2024. Addressing water scarcity in Greater Cambridge: update on government measures

[193] CPCA, 2025. A141

[194] UK Parliament, 2018. Parliamentary debate 17/10/18: East Coast Main Line investment

Infrastructure	Strengths	Weaknesses	Opportunities	Threats
	HGV and car dependency, contributing to climate targets and improving air quality	ECML works led to service disruptions and blockades (e.g. timetables altered for King's Cross remodelling) – future works might inconvenience passengers and slightly dampen rail's attractiveness in the short run • Huntingdonshire and CPCA rely on DfT/Network Rail for these investments; local influence is limited if national priorities shift	Huntingdonshire – for instance, Alconbury or Peterborough could develop an intermodal terminal, creating logistics jobs and investment • Rail improvements support the case for transit-oriented development: areas around Huntingdon and St Neots stations can be intensified (new apartments, offices), revitalising town centres and reducing greenfield sprawl	• Competing corridors (like if investment favours the Midland Main Line or others over ECML/Ely) could see Huntingdonshire's relative advantage decline. Also, if HS2 Phase 2 was revived differently, it might divert focus from improving ECML further, leaving some capacity issues unresolved
Energy infrastructure (power grid, renewables and EV charging)	• Existing major transmission lines and substations provide footprint to expand on • Renewable energy could attract environmentally minded businesses • EV charging is a sought after amenity on employment sites	• Distribution grid at capacity in parts, meaning upgrade costs could deter new development • Public opposition to renewable projects with concerns around blight and nuisance • Unequal access to EV charging infrastructure • Electrification (of transportation and industry) is increasing demand on the grid	• Grid upgrades could attract data centre, advanced manufacturing (such as battery factories), or agri-tech occupiers looking for available power and space • Co-locating renewable projects with housing could lead to community benefits (e.g. community solar)	• Limitations to growth or unreliable power supply could threaten business operations • Heavy influx of data centres (or similar dominance of a single sectors) could crowd out other growth • Vulnerability to policy shifts • Sensitivity of grid to security concerns
Digital infrastructure	• Rapid progression fibre rollout (e.g. Project Gigabit)[195] • Existing high 5G coverage provides foundation for future	• Some rural areas remain with gaps in coverage • Usually driven by external providers	• Becoming an ideal location for remote working, offering potentially more affordable living with high quality	• Uneven distribution of rollout could worsen unequal access • Slower movement in digital connectivity could mean

[195] Building Digital UK, 2023. Major broadband rollout for Cambridgeshire to benefit 45,000 rural homes and businesses

Infrastructure	Strengths	Weaknesses	Opportunities	Threats
	technologies which would utilise this (e.g. Internet of Things) • Minimising digital divide (spatially uneven access to the internet)	• Data literacy required to capitalise on improved connectivity • Large data centres have high resource intensity but low employment intensity	broadband, attracting highly paid professionals • Increased attractiveness for wider digital/tech investment • Option to encourage tech incubators or accelerators and capture overspill growth, ancillary businesses	Huntingdonshire loses out to competing areas • Public concerns could slow implementation
Social infrastructure	• Significant new investments committed e.g. Hinchingbrooke Hospital's inclusion in wave 1 of the national rebuild programme ensures Huntingdonshire will have a state-of-the-art healthcare facility • Ongoing expansion of school capacity (multiple new schools in pipeline) means the district can accommodate young families moving in • Educational outcomes can create a virtuous cycle attracting skilled professionals to live in the area • The presence of an Enterprise Zone at Alconbury with an innovation focus provides a platform to bridge education and research with industry	• No higher education institutions or university campus means there is a limited research and development presence • Healthcare capacity, even with a new hospital, will be tested by rapid population increase and an ageing demographic • If research facilities remain concentrated outside of Huntingdonshire (Cambridge/Peterborough), it risks being seen as periphery in the Arc's knowledge economy, which could potentially become a narrative weakness that could make it harder to draw in high-tech employers despite cheaper land	• A rebuilt hospital could attract private-sector health and life science activities around it (e.g. clinics, medical startups, training institutes). Huntingdon could build on this by promoting a health cluster • New schools and a potential FE college expansion offer a chance to tailor curricula to local industry needs which could entice companies who would know a talent pipeline exists • If Huntingdonshire could host a high-profile cluster, it would help raise the profile of the district which could spur further investment	• Economic downturn or government policy shifts could cut funding for planned projects leaving Huntingdonshire with a shortfall in infrastructure that is hard to address locally • Acute competition from bigger cities for education and healthcare professionals
Universal Studios Bedford	• Creates a new internationally branded visitor destination	• Site lies just outside Huntingdonshire's administrative boundary,	• Potential to stimulate investment in new hotels, leisure, and food and drink	• Risk that delays to enabling infrastructure (e.g. East West Rail or Wixams station) could

Infrastructure	Strengths	Weaknesses	Opportunities	Threats
	adjacent to Huntingdonshire, with the potential to support a large number of jobs across direct and indirect employment, significantly boosting the regional economy. • Facilitates major transport upgrades (East West Rail station, Wixams station, A421 slip roads) that will benefit Huntingdonshire residents, especially in St Neots and surrounding areas. • Positions the area within a global tourism and creative industries market, enhancing Huntingdonshire's profile and attractiveness to investors and complementary sectors.	limiting direct control over planning and the ability to secure developer contributions. • Potential for uncoordinated housing and infrastructure growth in neighbouring Huntingdonshire settlements without cross-boundary planning mechanisms.	businesses in south-west Huntingdonshire, especially in St Neots, creating a spillover tourism economy. • Opportunity to develop creative industry and digital sector clusters linked to Universal's demand for design, production, and tech talent, aligned with regional economic priorities. • Creation of training pipelines through partnerships with FE and HE providers in and around Cambridgeshire, offering career routes in themed entertainment, engineering, and customer service.	reduce accessibility and limit the scale of wider economic benefits. • Without coordinated spatial planning, increased commuter pressure could drive up house prices and strain local services in St Neots and surrounding villages.

12. Needs assessment

Modelling approach

12.1 This section of the report presents the findings with respect to each of the forecasting approaches ('scenarios') over the period between 2025 and 2046. For clarity, the results presented in this section of the report refer to gross need, with later sections presenting the assessment of net need in consideration of existing vacant space, replacement of losses and frictional vacancy (**Sections 13, 14 and 15**).

12.2 In order to test the implication of different scenarios on the requirement for employment floorspace and land over the Plan period, and to improve confidence in the robustness of the assessment such that a preferred scenario can be reached, three core scenarios (1a, 2a, and 3a), as required by PPG[196], are initially assessed.

12.3 All three of the core scenarios in some way project forward the continuation of past trends. Through the engagement undertaken as part of this assessment[197], some consultants and promoters of strategic sites have cast doubt on the ability of these core scenarios to effectively capture the need for specific uses (e.g. logistics space where automation is affecting the amount and type of space required to support employment). There is a risk that forecasts based on past trends may be 'baking in' economic circumstances such that the possibility of different futures is limited.

12.4 Huntingdonshire is strategically located, and there are opportunities to capture the continued growth of the region's economy across a range of sectors within its boundaries. For these reasons, it has been deemed appropriate to consider additional scenarios (1b, 2b, and 2c), in alignment with paragraph 027 of the applicable PPG which states that '*authorities will need to take account of longer term economic cycles in assessing this data, and consider and plan for the implications of alternative economic scenarios*'. These latter scenarios adapt the input forecasts in various ways to consider how alternative employment growth trajectories might be achieved.

- **Scenario 1a – Labour demand**: this scenario builds on employment forecasts produced by Oxford Economics and considers what space would be required to support the anticipated change in the employment profile across relevant sectors.
- **Scenario 1b – Labour demand (aspirational)**: this scenario adapts the inputs to the labour demand scenario with respect to employment in sectors which more recent market signals contrastingly suggest are performing better than long term trends.
- **Scenario 2a – Labour supply**: this scenario estimates the amount of employment (and resulting space) that would be required to support the population growth anticipated over the Plan period, aligning with the inputs to the housing need assessment being concurrently progressed. The distribution of jobs in scenario 2a is aligned with the labour demand (1a) scenario. The impact of different housing trajectories is assessed through sensitivity tests in **Section 14**.
- **Scenario 2b – Labour supply (apportionment by current residence-based employment)**: the additional future labour supply is apportioned to sectors reflecting the sectors that Huntingdonshire residents are currently employed in, assuming this split will remain constant over the Plan period.

[196] Ministry of Housing, Communities and Local Government, 2024. Housing and economic needs assessments.

[197] Volterra has conducted engagement with Newlands, Eddisons, Savills, Iceni Projects, Quod, Bletsoes, Endurance Estates, Tim Ashwin Consulting, DTRE, Hallam Land, and Boyer Planning among others. HDC/Volterra issued a call for engagement to a variety of stakeholders including those who submitted potential employment sites as part of the Call for Sites exercise, as well as other developers, agents, and site promoters. Volterra also liaised with the authors of the concurrent housing needs assessment, and as stated worked alongside the authors of the Economic Growth Strategy.

- **Scenario 2c – Labour supply (apportionment by future residence-based employment)**: the additional future labour supply is apportioned to sectors according to what the trends in residence-based employment by sector would suggest the future split could be in 2046.
- **Scenario 3a – Past-take up**: this scenario extrapolates the rate of space take-up in the previous ten years forward over the Plan period, as a proxy for the possible amount of space that is in demand and could be taken-up and occupied.

Key assumptions and limitations

12.5 Economic modelling is associated with an inherent level of uncertainty, given the requirements to make assumptions about the characteristics of the economy, and how it might change in future. It requires applying simplifications of complex dynamic processes in order to predict how the economy will evolve. Uncertainty naturally increases over longer study periods. The methodologies used in each of the scenarios require that assumptions are made relating to the employment density of employment-generating floorspace (the amount of floorspace required to support a job); the mixture of use types of floorspace utilised by different sectors; and plot ratios (the ratios of floorspace to land area).

Employment densities

12.6 The employment density of floorspace refers to the amount of floorspace required to support employment. Higher employment densities are associated with spaces like offices where employees work in closer proximity compared to in lower employment density spaces such as warehouses. It is important to understand the likely employment density of workspace in order to derive the employment floorspace requirement from jobs forecasts.

12.7 In the absence of detailed local evidence, it is deemed acceptable and in keeping with industry accepted methods to make use of ready reckoners. The Homes and Communities Agency (HCA) Employment Densities Guide[198], although now withdrawn[199], provides employment densities for a range of uses. Where local evidence is available, this has been used to inform the selection of an appropriate employment density.

12.8 HCA guidance also highlights the main ways employment density can vary from the ready reckoner benchmarks, which are primarily due to: '*advances in technology; the evolution of new forms of workspace'* (including through the rise of hybrid and homeworking); *'changing trading formats; and sector and sub-sector activity*.'[200] These effects remain applicable. Nonetheless, it is necessary to translate employment to floorspace, and the use of researched and widely utilised ready reckoners is deemed to be a reasonable approach.

Table 12.1 – Selecting the correct employment density is fundamental to establishing the demand for different floorspace types

Employment densities used in this assessment

Employment use	Employment density	Source
Office [E(g)(i)]	13m^2 NIA per FTE	General office

[198] Homes and Communities Agency, 2015. Employment Density Guide – 3rd edition.

[199] The HCA guidance has since been withdrawn, but having not been replaced, remains an applicable and widely utilised source of employment density information.

[200] Homes and Communities Agency, 2015. Employment Density Guide – 3rd edition.

Employment use	Employment density	Source
		HCA Employment Densities Guide
Research and development [E(g)(ii)]	18m^2 NIA per FTE	Volterra research of life science campuses in Cambridgeshire[201], reflecting a blended density across lab and supporting space.
Light industrial [E(g)(iii)]	47m^2 NIA per FTE	Light industrial HCA Employment Densities Guide
General industrial [B2]	36m^2 GIA per FTE	Industrial and manufacturing HCA Employment Densities Guide
Storage and distribution [B8]	95m^2 GEA per FTE	Storage and distribution (National Distribution Centre) HCA Employment Densities Guide

Source: Homes and Communities Agency, 2015. Employment Density Guide – 3rd edition. Volterra analysis.

NIA: Net Internal Area

GIA: Gross Internal Area

GEA: Gross External Area.

Sector to use profiling

12.9 The operations of businesses in different sectors require different types and locations of space to fulfil their activities and support employment. Attributing the requirements of sectors is an uncertain process because naturally a generalisation is applied to entire sectors when in reality businesses operating even within one sector may have different requirements. To reach a best estimate in the Huntingdonshire context, analysis of CoStar tenant information is conducted. This takes into account those premises for which tenant sector information is available and the types of space occupied by sector. An adjustment is made for employment density to approximate the proportion of employment accommodated in each use type by sector. This is also sense checked against profiles used in comparable assessments in neighbouring authority areas, where the information has been transparently presented, to confirm broad alignment.

[201] Volterra has previously assessed the employment density of existing life sciences campuses in Cambridgeshire, where it was considered that an employment density which blended a range of office, lab and light industrial spaces was most reflective of the variety of activities accommodated in research and development spaces. This took into account Cambridge Science Park and Babraham Research Campus (refer to Bidwells, 2023. Grafton Centre Economic Impact Assessment), as well as the Greater Cambridge Employment and Housing Evidence Update (Greater Cambridge Shared Planning Service, 2023). This resulted in a range between 15.2 – 21.5 m^2 NIA per FTE, of which 18.0 is roughly equivalent to the average of these values.

Table 12.2 – The amount of employment accommodated in different employment use space varies by sector

Sector to use profile

Sector	Office [E(g)(i)]	Research and development [E(g)(ii)]	Light industrial [E(g)(iii)]	General industrial [B2]	Storage and distribution [B8]	Other
Agriculture, forestry and fishing	0%	0%	0%	12%	7%	81%
Mining, quarrying and utilities	0%	0%	0%	0%	5%	0%
Manufacturing	0%	0%	20%	80%	0%	0%
Construction	0%	0%	0%	0%	10%	90%
Wholesale and retail trade; repair of motor vehicles and motorcycles	6%	0%	0%	6%	17%	70%
Transportation and storage	15%	0%	2%	6%	70%	7%
Accommodation and food services	0%	0%	0%	0%	0%	100%
Information and communication	29%	0%	23%	46%	1%	0%
Financial and insurance	45%	0%	0%	0%	0%	55%
Real estate	85%	0%	0%	6%	15%	4%
Professional, scientific and technical	70%	0%	16%	1%	10%	2%
Business administration and support services	100%	0%	0%	0%	0%	0%
Public administration and defence	100%	0%	0%	0%	0%	0%
Education	0%	0%	0%	0%	0%	100%

Sector	Office [E(g)(i)]	Research and development [E(g)(ii)]	Light industrial [E(g)(iii)]	General industrial [B2]	Storage and distribution [B8]	Other
Health	8%	11%	0%	0%	0%	82%
Arts, entertainment, recreation and other services	7%	0%	1%	9%	0%	84%

Source: Volterra analysis of CoStar data (2025) on tenant information by sector.

Plot ratios

12.10 The plot ratio is the ratio between the floor area and the site area of a workplace. This gives an impression of the space intensity of different employment uses, for example if offices are built with various storeys, but also indicates where activities necessitate an amount of surrounding land to the building for purposes such as parking and manoeuvring of vehicles. Understanding the plot ratio is required in order to translate floorspace demand to land demand, given the need for an amount of supporting land area to be developed alongside employment buildings themselves.

12.11 Based on analysis of commercial property information for each of the employment uses that are part of this assessment, it is possible to determine the profile of plot ratios in Huntingdonshire, rather than rely on ready reckoners. The average plot ratios identified (based on analysis of properties in Huntingdonshire for which land area information was available) are shown in **Table 12.3**.

Table 12.3 – An accurate picture of plot ratios assists in translating floorspace demand to land demand

Plot ratios used in this assessment

Employment use	Plot ratio
Office	0.67
Research and development	0.82
Light industrial	0.48
General industrial	0.30
Storage and distribution	0.39

Source: Volterra analysis of CoStar data.

Scenario 1a – Labour demand

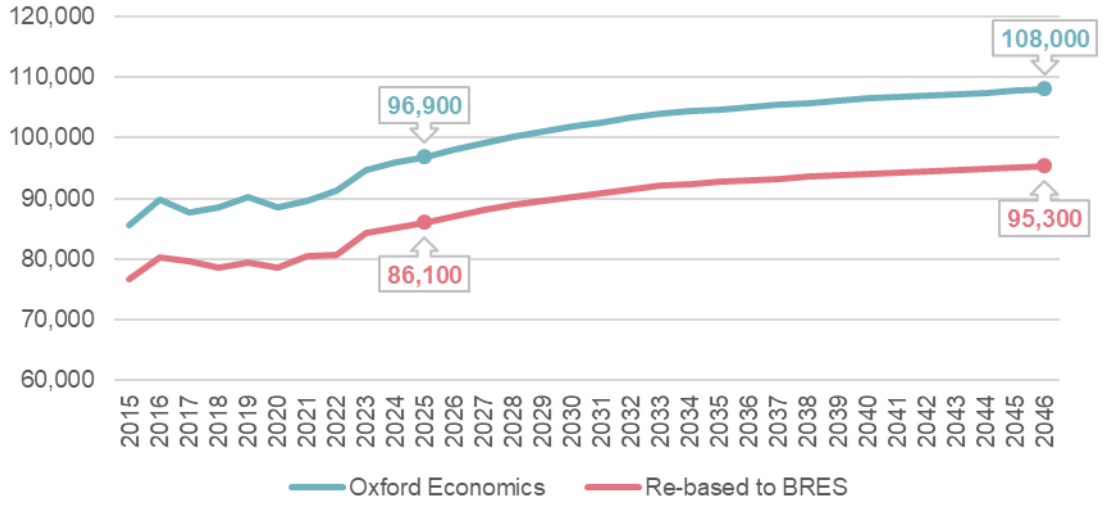
12.12 The labour demand scenario utilises employment forecasts sourced from Oxford Economics' (OE) local authority district (LAD) model, the output of which is the anticipated change in employment in a number of sectors over the study period to 2046. The model includes macroeconomic indicators (such as GDP, consumer spending, government spending, inflation and unemployment) as well as local demographic

(population and migration) change and provides forecasts for employment disaggregated by LAD and sector.

12.13 Volterra has mapped the OE sectors against Business Register and Employment Survey (BRES) broad industrial groups, and re-based the forecast in line with BRES recorded employment data on the basis that the survey reflects the latest recorded adopted national statistics at a high level of spatial and sectoral resolution.[202] This requires applying the year-on-year growth rate derived from the OE forecasts forward from the latest year that BRES data was published for (2023). The result of this exercise is shown in **Figure 12.1**. Between 2025 and 2046, employment in Huntingdonshire is expected to grow from 86,100 jobs to 95,300 jobs reflecting an increase of 9,200 jobs, or growth of 11%.[203]

Figure 12.1 – Employment in Huntingdonshire is expected to grow by 9,200 jobs between 2025 and 2046

Oxford Economics employment forecast remapped on to Business Register and Employment Survey baseline



Source: Volterra analysis of Oxford Economics data using Office for National Statistics, 2024. Business Register and Employment Survey. Note figures have been rounded.

12.14 As part of this overall change in employment, different sectors are expected to be differentially affected, with some sectors expected to experience a notable increase in employment, whilst a limited number of sectors are expected to record reductions in employment. The manufacturing sector notably is expected to record a reduction of 2,700 jobs over the study period, or a reduction of 25% compared to 2025. Increases in

[202] Whilst it is noted that the difference in the employment in sectors between the forecast (OE) and recorded (BRES) sources is large in some instances, this is expected to have a limited impact on the results of the modelling because: the relative proportion represented by each sector in the two sources varies by only +/- 1%; the sectors which have been assigned the highest proportion of low density use floorspace requirement have some of the smallest absolute differences in employment numbers; and those sectors with the highest absolute difference in overall change across the study period primarily require higher density uses, meaning the overall variation in floorspace need depending on source data would be limited.

[203] Note figures have been rounded.

employment will be driven primarily by the health (+2,800, +28%), business administration (+1,900, +31%), construction (+1,500, +32%) and professional, scientific and technical sectors (+1,200, +18%).

Table 12.4 – Employment growth in Huntingdonshire is expected to be driven by the health, business administration, and construction sectors whilst employment in the manufacturing sector is expected to reduce

Employment forecasts by sector (2025 – 2046)

Sector	Employment (2025)	Employment (2046)	Change in employment (no., 2025 – 2046)	Change in employment (%, 2025 – 2046)
Health	10,100	12,900	2,800	28%
Business administration and support services	6,100	8,000	1,900	31%
Construction	4,600	6,100	1,500	32%
Professional, scientific and technical	6,900	8,100	1,200	18%
Wholesale and retail trade; repair of motor vehicles and motorcycles	12,700	13,900	1,100	9%
Education	6,600	7,600	1,100	16%
Arts, entertainment, recreation and other services	3,700	4,300	630	17%
Information and communication	2,800	3,400	620	22%
Accommodation and food services	6,100	6,600	530	9%
Transportation and storage	3,600	4,100	480	13%
Mining, quarrying and utilities	2,100	2,100	70	3%
Financial and insurance	900	1,000	50	5%
Real estate	1,700	1,700	50	3%
Public administration and defence	6,200	6,200	10	0%
Agriculture, forestry and fishing	1,300	1,200	-120	-9%
Manufacturing	10,700	8,100	-2,700	-25%

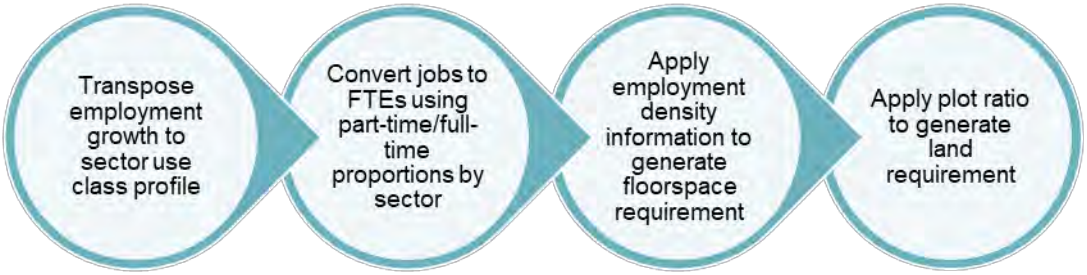
Sector	Employment (2025)	Employment (2046)	Change in employment (no., 2025 – 2046)	Change in employment (%, 2025 – 2046)
Total	**86,100**	**95,300**	**9,200**	**11%**

Source: Volterra analysis of Oxford Economics forecasts. Note figures may not sum due to rounding.

12.15 The growth and reduction of employment in each of the respective sectors will generate a change in demand for floorspace and land required to support employment in those sectors. In order to derive this, the broad approach set out in **Figure 12.2** is followed. The sector use profile is used to translate employment change to the relevant use classes. The result indicates how jobs per use class are expected to change over the study period. A portion of this change is attributed to scoped out use types such as retail and hospitality, meaning these jobs and space are subsequently omitted from the assessment. The employment densities set out in **Table 12.1** are used to generate the floorspace requirement, having taken into account the part-time/full-time proportion of workers in each sector in Huntingdonshire[204] to allow for conversion with benchmarks that relate to FTEs. This information is then adapted using plot ratios to generate the land requirement.

Figure 12.2 – The broad approach to deriving floorspace and land requirements from employment change follows key steps

Approach to deriving floorspace and land requirements



12.16 The results of this exercise are shown in **Table 12.5**. The labour demand scenario produces a requirement for office, research and development, and storage and distribution floorspace and land, with a reduction in demand for general industrial and light industrial floorspace and land. This result is potentially unsurprising given the reliance of the methodology on employment forecasts which take into account macro-economic trends, including national trends in employment which typically expect a decline in manufacturing into the future (with this sector being a key occupier of general industrial space). The scenario would be associated with a change of a total of 1,980 jobs (FTEs) in core employment uses. Core employment uses are defined for the purposes of this study as those uses scoped in to the assessment.

[204] Office for National Statistics, 2024. Business Register and Employment Survey 2023.

Table 12.5 – The labour demand scenario produces a gross requirement for office, research and development, and storage and distribution floorspace and land, with a reduction in demand for other uses

Scenario 1a – Labour demand floorspace and land requirements (gross)

Employment use	Change in jobs (FTEs)	Floorspace demand (m^2)	Land demand (ha)
Office	2,800	36,800	5.5
Research and development	230	4,200	0.5
Light industrial	-170	-8,100	-1.7
General industrial	-1,600	-59,200	-19.7
Storage and distribution	720	68,100	17.5

Source: Volterra analysis. Note sum figures may not sum due to rounding.

Scenario 1b – Labour demand (aspirational)

12.17 Applicable PPG warrants that alternative scenarios are considered where there is evidence that strategic scale needs may apply.[205] In Huntingdonshire, a number of identified market signals suggest that there is a rationale for considering an alternative scenario which is more optimistic about the future of manufacturing and logistics sectors. These include:

- The magnitude and variety of major proposals being progressed by landowners and developers, proposing uses appealing to these sectors;
- The spatial context for housing, population and employment growth relating to the political impetus for these in this location (e.g. Case for Cambridge[206]);
- Market conditions of low vacancy in both general industrial and storage and distribution floorspace over at least the decade preceding this assessment which could be indicative that demand is being unmet;
- Average take-up of general industrial space (likely including take-up by manufacturing firms) in contradiction to other scenarios;
- Evidence from landowners, agents, developers and consultants who have been engaged in this assessment that there is potentially unmet demand for different types and scales of employment spaces which could be inhibiting business growth[207];
- Recent infrastructure upgrades which could unlock or facilitate better access across the district such as the A14 Cambridge to Huntingdon Improvement Scheme; and
- Constrained scope for delivery of new employment spaces in neighbouring areas due to limitations on physical space (such as in Peterborough where '*most of the allocations in the current Local Plan have*

[205] Ministry of Housing Communities and Local Government, 2024. Housing and economic needs assessments. Paragraph 027.

[206] HM Government, 2024. The Case for Cambridge.

[207] Volterra has considered evidence put forward by site promoters and consultants with regard to the concept of suppressed demand, which has been set out in further detail in **Appendix D**.

been developed, with only small parcels left available'[208]), as well as planning constraints such as Green Belt policy.

The change in employment in manufacturing, transportation and storage as a critical uncertainty

12.18 Opinions and evidence on the potential change in employment in the manufacturing, and transportation and storage sectors over the Plan period point to different outcomes. These sectors also warrant particular interrogation because of their demand for employment space types which have been indicated by landowners and agents to be most in demand, in addition to being those use types which seem to be ineffectively captured by the need scenarios. To assess the possibilities of these sectors growing or declining in terms of jobs supported, analysis has been undertaken on the forecasts which underpin the labour demand scenario as well as historical data on how these sectors have performed over time.

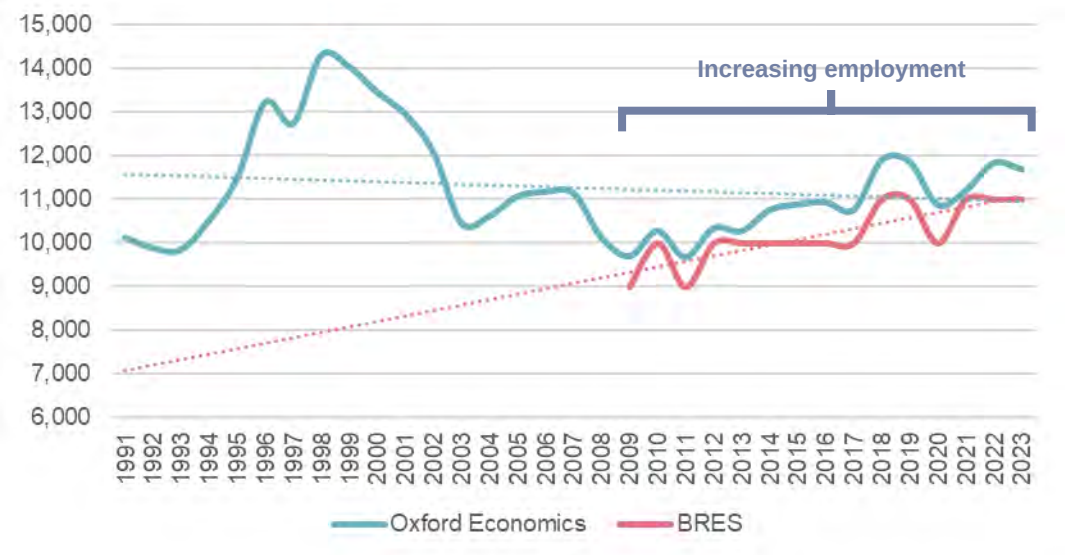
Manufacturing

12.19 The manufacturing sector remains one of the main employment sectors in Huntingdonshire, currently reflecting around 11,000 jobs. However, the timeframe over which employment change is considered determines the outlook for a sector if projected forward. **Figure 12.3** highlights how the Oxford Economics employment forecasts and BRES data are closely aligned, and that employment in the manufacturing sector since 2009 (the earliest available data for which BRES data is available) has broadly increased. Nonetheless the period over which a trend in employment is considered is a determining factor of the outlook for future change in that sector. For example, if extrapolated from the trend since 1991 as shown by the Oxford Economics data, a slight decrease in employment in manufacturing might be expected in future.

[208] Peterborough City Council, 2024. Peterborough HENA Part 2: Employment Need Assessment.

Figure 12.3 – The timeframe over which change in employment in manufacturing is considered affects the outlook on the sector's future performance

Change in employment in manufacturing



Source: Oxford Economics. Office for National Statistics, 2024. Business Register and Employment Survey 2009 – 2023.

12.20 To test the hypothesis that, in Huntingdonshire, industrial activities in some manufacturing activities have declined to a point where they are unlikely to decline further[209], yet emerging and innovative processes and technologies are driving increases in employment that might be expected to increase[210], consideration has been given to the growth rate in employment over different time periods compared to the equivalent rate for neighbouring local authority areas. This is compared to the forecast growth rate to compare how the expectation relates to recorded growth in Huntingdonshire and its neighbouring local authorities and to further contextualise the forecast predictions. The year 2023 is used as a reference frame because it is the latest year for which comparable data is available across the two datasets.

12.21 Compared to the neighbouring local authority areas, employment growth in manufacturing in Huntingdonshire has fared better than some (Bedford and Cambridge), and more modestly than others (Peterborough). Oxford Economics and BRES broadly concur that historically employment has grown in this sector in Huntingdonshire, but the forecast growth rate is more highly negative than has been recorded in any previous time period considered here.

[209] Traditional manufacturing activities which have recorded a decline in employment include manufacturing of motor vehicles and other transport manufacturing, furniture manufacturing, and manufacturing of rubber products, as indicated by BRES data.

[210] Emerging manufacturing activities with a presence in Huntingdonshire which might be expected to increase include forming and moulding, robotics and automation, and electronic components.

Table 12.6 – Forecast rate of decline in manufacturing employment in future contradicts historic performance

Compound Annual Growth Rate (CAGR) for employment in manufacturing by local authority and time periods

Period	Huntingdonshire, Oxford Economics	Huntingdonshire, BRES	Bedford	Cambridge	Central Bedfordshire	East Cambridgeshire	Fenland	Peterborough	South Cambridgeshire	North Northamptonshire
Latest five years (2018 – 2023)	-0.3%	0.0%	-3.6%	-6.5%	0.0%	0.0%	3.1%	4.6%	0.0%	-0.9%
Latest ten years (2013 – 2023)	1.3%	1.0%	0.0%	-4.6%	1.0%	0.0%	1.6%	0.0%	0.0%	0.2%
Latest fourteen years[211] (2009 – 2023)	1.3%	0.0%	3.9%	0.0%	2.9%	0.8%	2.1%	5.8%	3.7%	3.7%

Oxford Economics modelled growth rate (1991 – 2023)	0.4%
Oxford Economics modelled growth rate (2003 – 2023)	0.6%
Oxford Economics modelled growth rate (2008 – 2023)	1.0%
Oxford Economics	-1.3%

[211] Fourteen years was chosen for this category because it reflects the maximum time frame for which comparable data is available.

Period	Huntingdonshire, Oxford Economics	Huntingdonshire, BRES	Bedford	Cambridge	Central Bedfordshire	East Cambridgeshire	Fenland	Peterborough	South Cambridgeshire	North Northamptonshire
forecast (2023 – 2046)										
Oxford Economics forecast (2025 – 2046)	-1.3%									

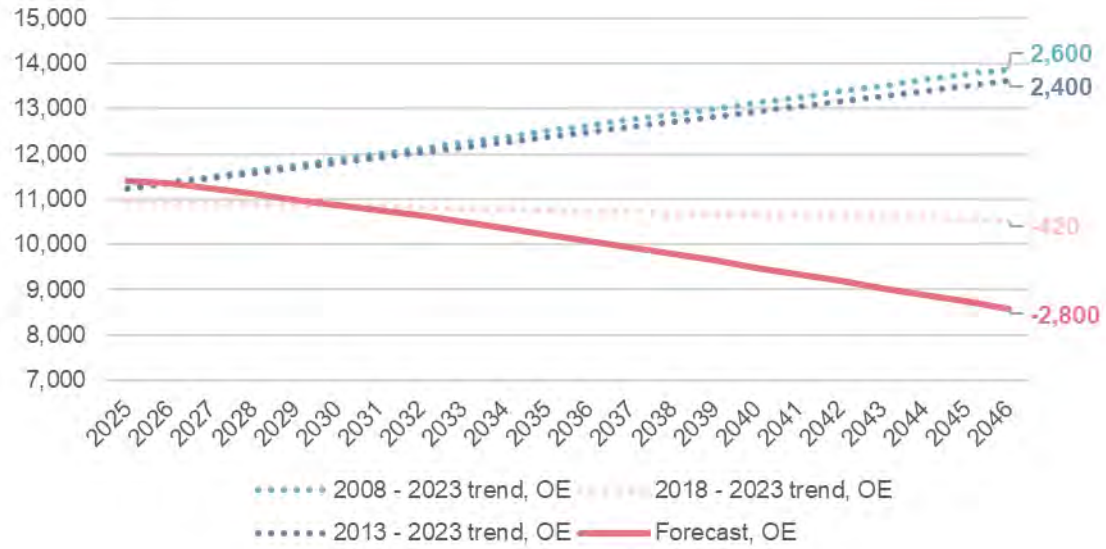
Source: Oxford Economics. Office for National Statistics, 2024. Business Register and Employment Survey 2009 – 2023.

12.22 The Oxford Economics model forecasts a decline of 2,800 jobs in manufacturing. An aspirational scenario could include an alternative future for change in employment in manufacturing that more closely reflects recent trends. A linear regression approach has been applied to the rebased[212] employment forecasts to anticipate the effect that change in line with more recent trends would produce. If growth over the Plan period reflects that which occurred between 2008 and 2023 (1.0% CAGR), or 2013 and 2023 (1.3% CAGR), around 2,600 or 2,400 additional manufacturing jobs would be created. The ten year time frame between 2013 and 2023 is likely most robust because it allows for the macroeconomic conditions during the global financial crisis, and the coronavirus pandemic, to be smoothed.

[212] Employment data derived from Oxford Economics is rebased within the modelling to reflect recorded employment levels.

Figure 12.4 – A high aspirational scenario could include growth in employment in the manufacturing sector

Forecast employment growth when different input study years are considered



Source: Volterra analysis of Oxford Economics data.

Transport and storage

12.23 The transport and storage sector, within which many logistics jobs are categorised[213], requires large-scale storage and distribution (B8) use type premises, as well as smaller regional and last-mile facilities. The space-intensive nature of these uses means that needs may not be closely related to trends in employment, given the ability for a small number of large premises (especially where development of this kind has historically been limited) to significantly change the amount of employment within this sector in a local authority area. Given this potential, it was deemed appropriate to consider the effect that a step-change in employment in this sector could have.

12.24 A similar exercise is undertaken to the adjustment to the manufacturing sector above, whereby the performance of the neighbouring local authority areas is interrogated to understand what scale of growth is appropriate and achievable (given it has materialised in similar geographical context). **Table 12.7** clearly illustrates how there has been very little growth in the sector in Huntingdonshire over time, in sharp contrast to how the neighbouring authority areas have experienced much greater rates of growth. Little to no growth in employment in this sector could be a factor of a lack of availability of suitable land for new development.

12.25 If a CAGR for transport and storage employment which aligns with the average of the neighbouring local authority areas over a ten year period between 2013 and 2023 (4.0% CAGR) is assumed to apply to Huntingdonshire, an additional 5,000 jobs would be created over the Plan period.

[213] It is recognised that the 'logistics' sector has some employment requirements within other broad industrial groups, however 'transportation and storage' reflects the closest broad industrial group.

Table 12.7 – The low employment growth of Huntingdonshire's transport and storage sector is an outlier compared to neighbouring areas

CAGR for employment in transport and storage sector by local authority and time periods

Period	Huntingdonshire	Bedford	Cambridge	Central Bedfordshire	East Cambridgeshire	Fenland	Peterborough	South Cambridgeshire	North Northamptonshire	Average
Latest five years (2018 – 2023)	0.0%	8.4%	2.7%	0.0%	0.0%	0.0%	4.1%	7.4%	4.0%	3.0%
Latest ten years (2013 – 2023)	0.0%	4.1%	1.3%	6.1%	1.1%	2.9%	10.6%	5.2%	4.2%	4.0%
Latest fourteen years[214] (2009 – 2023)	0.0%	3.9%	0.0%	2.9%	0.8%	2.1%	5.8%	3.7%	3.7%	2.5%

Synthesis of adjustments

12.26 The labour demand (aspirational) scenario therefore is constructed on the hypothesis that, in terms of employment, the manufacturing sector will perform at least as well at it has done over the last ten years for which recorded data is available (**Table 12.6**), and that the transport and storage sector will perform in line with what has been recorded in neighbouring local authority areas (**Table 12.7**). The evidence presented, which compares the performance of Huntingdonshire to nearby local authority areas, demonstrates the greater magnitude of growth in transport and storage employment in a similar context that could be achieved. The recent infrastructure upgrades, particularly to the SRN, present opportunities for growth which could more closely align with and support this relatively higher level of employment growth, which warrants testing the adjustments made.

12.27 The quantitative approach to the labour demand (aspirational) scenario is as follows. An adjustment to the labour demand forecasts of manufacturing employment is made through applying a linear regression on growth over a ten year period.[215] The average CAGR of employment in the transport and storage sector of

[214] Fourteen years was chosen for this category because it reflects the maximum time frame for which comparable data is available.

[215] This ten year period is selected for the reasons discussed, namely: the least impacted by macroeconomic events, and the latest period for which comparable data is available.

the neighbouring local authority areas is applied to Huntingdonshire's employment base in this sector and extrapolated over the Plan period. The approach set out in **Figure 12.2** is then applied to these updated employment forecasts to derive floorspace and land need, the results of which are presented in **Table 12.8**. This scenario would be associated with a change of a total of 11,440 jobs (FTEs) in core employment uses.

12.28 The most fundamental differences in this scenario relate to the demand for general industrial becoming positive rather than negative as in scenario 1a, and that the positive demand for storage in distribution in scenario 1a becomes much more positive in scenario 1b. The requirement for the other employment uses (office, research and development, and light industrial) due to the increased need from the sectors which have been adjusted.

Table 12.8 – The labour demand (aspirational) scenario produces gross need across all employment use types

Scenario 1b – Labour demand floorspace and land requirements (gross)

Employment use	Change in jobs (FTEs)	Floorspace demand (m^2)	Land demand (ha)
Office	3,700	48,700	7.3
Research and development	260	4,800	0.6
Light industrial	980	46,200	9.6
General industrial	2,700	96,300	32.1
Storage and distribution	3,800	361,000	92.6

Source: Volterra analysis. Note sum figures may not sum due to rounding.

Scenario 2a – Labour supply scenario

12.29 The labour supply scenario is a variation on the labour demand scenario except it reflects a more 'top-down' approach, working backwards from the potential workforce size over the Plan period to derive the necessary employment space to support this population growth. The labour supply available is closely related to the delivery of housing over this time period.

12.30 A housing need assessment for Huntingdonshire is being undertaken by Iceni Projects Ltd. concurrently to this assessment. As part of the Government's reforms to the NPPF in December 2024, a new Standard Method for determining housing need was introduced.[216] The specified methodology gives an initial assessment of the housing need for a local area, taking into account the existing stock of housing and making an adjustment based on the affordability pressures present in the area. This results in a minimum target of 1,214 net additional dwellings per annum. The level of housing delivery will impact the supply of labour in the district over the study period, and vice versa the amount of employment opportunities will determine that development is sustainable.

12.31 The labour supply forecasts which derive from the standard method were prepared by Iceni Projects Ltd. through the application of age and sex specific economic activity rates sourced from the Office of Budget Responsibility (OBR). For the purposes of the EENA, it is also important to understand who in

[216] Ministry of Housing Communities and Local Government, 2024. Housing and economic needs assessments.

Huntingdonshire works, where they work, and the nature of their employment. Volterra has therefore made further adjustment to the projections to account for:

- Around 3.7% of Huntingdonshire's working age population are unemployed. It is assumed that this rate will remain constant over the Plan period.[217]
- The ratio of workplace based employment within Huntingdonshire to the district's resident employment within Oxford Economics forecasts is 0.87.
- The ratio of jobs-based to people-based employment derived from Oxford Economics data is 1.04, which is representative of double jobbing.

12.32 Once these factors have been applied, the total additional labour supply between 2025 and 2046 is expected to be 26,000. The additional labour supply is then mapped against the relative proportions each sector contributes to gains in employment (year on year change per Oxford Economics forecasts) in the years of the study to determine the overall change per sector. Absolute losses in employment per sectors which are declining in employment in the Oxford Economics forecasts (i.e. agriculture, forestry and fishing, and manufacturing) are retained. A similar approach to that set out in **Figure 12.2** is then applied to deduce floorspace and land demand for each employment use type. This scenario would be associated with a change of a total of 8,500 jobs (FTEs) in core employment uses.

Table 12.9 – The labour supply scenario produces positive gross demand with the exception of general industrial space

Scenario 2a – Labour supply floorspace and land requirements (gross)

Employment use	Change in jobs (FTEs)	Floorspace demand (m^2)	Land demand (ha)
Office	6,900	90,300	13.5
Research and development	590	10,500	1.3
Light industrial	310	14,600	3.0
General industrial	-1,100	-42,000	-14.0
Storage and distribution	1,800	170,000	43.5

Source: Volterra analysis. Note sum figures may not sum due to rounding.

Scenario 2b – Labour supply (apportionment by current residence-based employment)

12.33 The core labour supply scenario (2a) relies on the trends in sector employment from the Oxford Economics forecasts to assign the additional labour supply to different sectors and therefore floorspace need. An alternative way to apportion the additional labour supply is taken in scenario 2b. This considers the jobs undertaken in Huntingdonshire by its residents. This reflects the expected employment needs of Huntingdonshire residents.

[217] This assumption aligns with the Huntingdonshire Local Housing Needs Assessment 2025.

12.34 This approach has been taken on the rationale that: there are path dependencies in labour markets such that industrial structures evolve gradually and skills/occupational structures follow established education and training pipelines; uncertainty around predicting sector-specific technological adoption and productivity change means avoiding volatile assumptions is considered to produce robust, transparent estimates; and it is a coherent approach to reflect actual sectoral strengths. Put simply, the scenario converts the future labour supply into what jobs would be required in the district to provide these future working residents with employment, based on current patterns of residential employment by sector. For the reasons set out around the slow evolution of industrial structures and skills profiles, this reflects a reasonable expectation of what jobs might be required in the future to support the planned population growth.

12.35 Existing data on residence-based employment derives from the Annual Population Survey using the calendar year time frame[218]. The industrial groupings are disaggregated into the sectors used in this assessment by their relative proportions according to BRES data in the latest year for which data was available for all groupings (2021).

12.36 Analysis of the current resident-based employment, once disaggregated into the broad industrial categories used throughout this assessment, shows that 16% of residents are employed in manufacturing, 14% in health, and 11% in wholesale, retail trades and the repair of motor vehicles.[219]

12.37 The same sector to use mapping is applied as previously (**Table 12.2**). The resulting need figures are influenced by the sectors residents currently work in such that it is anticipated that there will be greatest future demand for general industrial space. This is shown in **Table 12.10**. This scenario would be associated with a change in a total of 11,900 jobs (FTEs) in core employment uses.

Table 12.10 – The adjusted labour supply scenario for existing residence-based employment is influenced by existing industrial specialisms[220] of Huntingdonshire's residents

Scenario 2b – Labour supply floorspace (apportionment by current residence-based employment) and land requirements (gross)

Employment use	Change in jobs (FTEs)	Floorspace demand (m^2)	Land demand (ha)
Office	5,000	65,400	9.8
Research and development	300	5,500	0.7
Light industrial	1,200	56,500	11.8
General industrial	4,000	142,000	47.4
Storage and distribution	1,400	133,000	34.2

Source: Volterra analysis. Note sum figures may not sum due to rounding.

[218] Office for National Statistics, 2025. Annual Population Survey (Industry of Employment, January 2021 – December 2021).

[219] The latest ten year period for which data is available (2015 – 2024) is used as the basis from which to extrapolate change in the sector breakdown forward.

[220] Industrial specialisms are referenced in the preceding paragraphs, namely: manufacturing, health, wholesale, retail trades and the repair of motor vehicles.

Scenario 2c – Labour supply (apportionment by future residence-based employment)

12.38 The sectors in which Huntingdonshire residents work in future could potentially change. To estimate what the breakdown of residence-based employment by sector is likely to be by 2046, linear regression on the change in this over time is performed. This process considers how the sectoral breakdown of resident-based employment has been changing over a ten year time period[221] as a means of extrapolating to predict values outside of this observed data (i.e. over the Plan period if recorded trends continue indefinitely).

12.39 The additional labour supply (as calculated per **paragraphs 12.30** to **12.31**) is apportioned by the resulting breakdown of employment by sectors that could occur by 2046. The need generated is presented in **Table 12.11**. This scenario would be associated with a change of a total of 10,820 jobs (FTEs) in core employment uses.

12.40 The main differences between this scenario compared to scenario 2b, are that the proportion of residents working in research and development, and both light and general industrial have been falling, whilst the proportions working in storage and distribution has been rising. The proportion working in offices has remained broadly constant. The differences between scenarios 2b and 2c are in reality quite small however, suggesting that there have been relatively slight shifts in residential sectoral working distributions, which supports the proposition discussed in **paragraph 12.34** that these are relatively slow to change.

Table 12.11 – The adjusted labour supply scenario for potential future residence-based employment considers how needs might change if trends in sector employment are extrapolated

Scenario 2c– Labour supply floorspace (apportionment by future residence-based employment) and land requirements (gross)

Employment use	Change in jobs (FTEs)	Floorspace demand (m^2)	Land demand (ha)
Office	4,800	63,700	9.5
Research and development	150	2,600	0.3
Light industrial	970	45,600	9.5
General industrial	3,100	108,000	36.1
Storage and distribution	1,800	168,000	43.1

Scenario 3a – Past take-up scenario

12.41 Consideration is also given in this assessment to a past take-up scenario based on the rationale that the prevailing market conditions represent a reasonable proxy of demand. The amount of space leased in an average year (move-ins less space vacated as given by the net absorption metric) is indicative of the amount of space that could be accommodated by the commercial property market for each respective use

[221] Up to the latest date for which consistently reliable data is available for all sectors.

type in a given year. This proxy remains reasonable in conditions of unconstrained supply, in the absence of which some degree of suppressed demand could be present.

12.42 Based on the net absorption of floorspace across each of the employment-generating uses of this assessment, there is some degree of variation of demand depending on the period over which it is analysed. Five, ten and fifteen year periods are considered. All sectors (with the exception of general industrial) show declines in take-up over time – i.e. the fifteen year averages are the highest, followed by the ten year and the five year rates are the lowest. The previous five years to this assessment, encompassing a period when restrictions associated with the coronavirus pandemic affected the ways and locations where people worked, take-up of offices was lower than in previous periods. The take-up of storage and distribution floorspace has remained broadly consistent, but slightly decreasing. The take-up of general industrial space is the only sector to have increased over time, where the five year rate is the highest of all periods and considerably so. The ten year average is considered to be most representative of demand for all employment uses, given it takes into account a more recent period that was not fully affected by temporary demand alterations relating to the coronavirus pandemic.

Table 12.12 – The past take-up of employment space in Huntingdonshire has been dominated by storage and distribution, and general industrial uses

Past take up of employment space (m^2) per annum based on five, ten, and 15 year averages

Employment use	Take-up (five year average)	Take-up (ten year average)	Take-up (15 year average)
Office	220	1,300	1,500
Research and development	0	120	130
Light industrial	360	460	900
General industrial	9,100	5,200	6,800
Storage and distribution	9,100	10,300	11,500

Source: CoStar, 2025.

12.43 Extrapolating the ten year average take-up over the study period to 2046 produces a positive requirement for floorspace and land in all employment uses. This assumes that the gross demand/need in each year of the Plan period is equivalent to the average amount of space historically taken up. This is shown in **Table 12.13**.

Table 12.13 – The past take-up scenario produces a positive gross requirement for all employment uses

Scenario 3a – Past take-up floorspace and land requirement (gross)

Employment use	Floorspace demand (m^2)	Land demand (ha)
Office	38,000	5.7
Research and development	29,300	3.6
Light industrial	20,200	4.2

Employment use	Floorspace demand (m^2)	Land demand (ha)
General industrial	138,000	46.0
Storage and distribution	234,000	60.1

13. Identifying the supply/demand balance

13.1 The results of the scenario testing in **Section 12** present the gross amount of floorspace need without taking account of the existing levels of vacant stock, or making allowances for frictional vacancy (an additional allowance for efficient operation of the commercial property market), or replacement of losses of stock anticipated over the study period. These factors, along with the pipeline of potential development, are considered in this section.

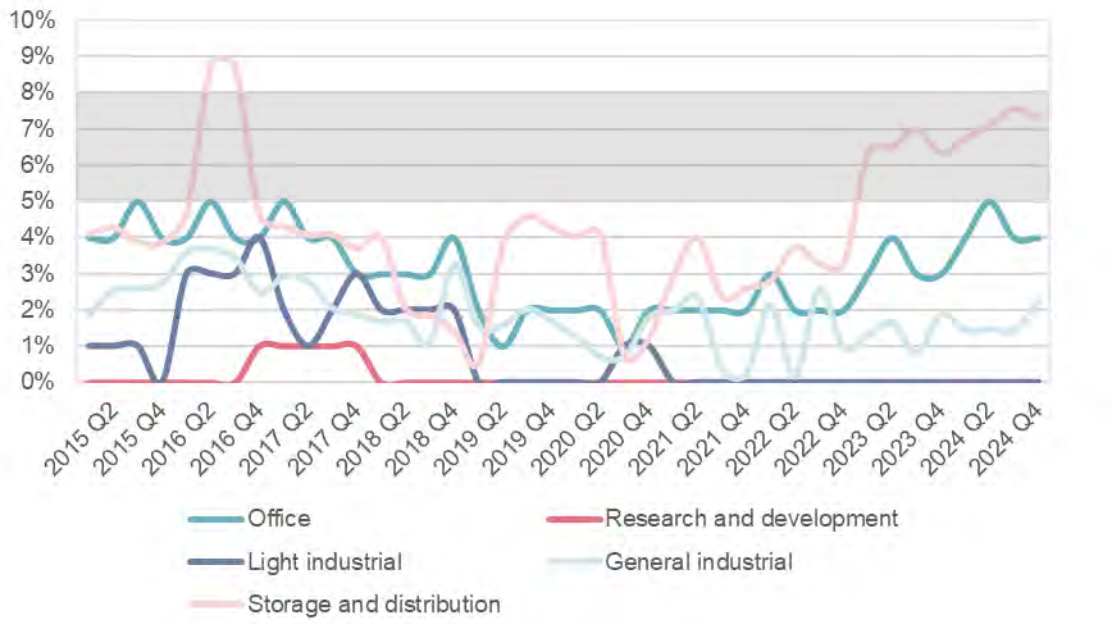
Frictional vacancy

13.2 Commercial property markets are often characterised by a degree of natural vacancy which is caused by the difference in time between properties being vacated and occupied, buildings being renovated, and seasonal effects on demand. An amount of vacant space within the market allows for occupiers to relocate adjusting for business needs or expansion, attracting new occupiers and providing sufficient choice for efficient leasing (properties being available). The optimum frictional vacancy rate across employment-generating uses is often considered to be between 5% and 8%.[222]

[222] Knight Frank, 2023. UK Logistics Real Estate: The Year Ahead

Figure 13.1 – The vacancy rate across all employment uses, with the exception of storage and distribution premises, has remained below the optimum frictional vacancy rate over the ten years before 2025

Vacancy rate by employment use (%, 2015 – 2024, where the grey indicates the usual range for optimum frictional vacancy rates)



Source: CoStar, 2025.

13.3 In economic needs assessments an allowance for frictional vacancy is sometimes used as a way to account for churn, flexibility and a margin of error within the modelling. Accordingly, in this assessment an adjustment of 8% is made. This aligns with best practice[223] and a rate deemed appropriate by agents on engagement.

13.4 For light industrial premises, the very low vacancy rate (which is significantly below the frictional vacancy rate) could be indicative of conditions of: demand exceeding supply, making it hard for tenants to find available properties; little or no spare capacity which could place upward pressure on rents and prices; and reduced choice and flexibility. The vacancy rate for offices is trending towards a level which is more or less reasonable for the office market to operate efficiently. The vacancy rate for storage and distribution premises falls within the optimal range although has only experienced this condition for a short period. For general industrial properties, it is likely that new occupiers would be unlikely to find appropriate space to enter the market.

Replacement of losses

13.5 It is recognised that as business needs evolve over time, and occupier requirements for some sectors tend towards higher quality space, ageing and unsuitable stock of employment-generating floorspace will necessarily need to be replaced, if abandoned or deemed no longer appropriate. This issue may be

[223] Greater London Authority, 2012. Land for Industry and Transport Supplementary Planning Guidance.

compounded by tightening energy performance requirements, and the effect that permitted development rights have on the ability for commercial premises to be repurposed (refer to **Sections 0 and 5** for further detail on trends in and implications of these issues).

13.6 It is therefore necessary to account for these losses and include an adjustment to the labour demand and labour supply scenarios. It is assumed that the past take-up scenario already accounts for the market responding to replacements.[224] Although an adjustment for replacement of losses is considered appropriate, there will be some amount of replacement of losses happening ordinarily across employment-generating uses on sites. It is therefore suggested that planning for a replacement of between 25 – 50% of per annum losses is reasonable. For offices, 25% is considered to be reasonable, and for industrial uses 50% is considered applicable. This is informed by consideration of best practice in employment needs assessments, and how such evidence base documents have treated this issue in the context of decreasing demand for office space in certain locations, and rapidly ageing industrial stock. The implication of this adjustment over the Plan period is shown in **Table 13.1**.

Table 13.1 – It is necessary to adjust the needs scenarios to account for losses of employment-generating floorspace

Implications of adjusting needs scenarios for replacement of losses. The replacement rate taken forward by each use type is highlighted

Employment use	Per annum losses based on a ten year average (m^2)	Floorspace replacement (at 25%) required over the study period (2025 – 2046)	Floorspace replacement (at 50%) required over the study period (2025 – 2046)
Office[225]	-5,900	**30,700**	61,400
Research and development[226]	-2,300	**12,300**	24,700
Light industrial[227]	-3,100	16,500	**32,900**
General industrial[228]	-4,400	23,100	**46,300**
Storage and distribution[229]	-3,700	19,300	**38,500**

Source: HDC, 2024. Huntingdonshire Business Completions and Commitments 2023/24. Note: figures may not sum due to rounding.

[224] The past take-up scenario extrapolates recorded trends. It is assumed that these trends already take into account the construction and take-up of new space (via net absorption) as the scenario is property market focussed. The other scenarios are based on labour forecasts, and in that way are blind to patterns in churn, which therefore warrants adjustment.

[225] Assumed to comprise the floorspace within the recording categories 'B1 (Unspecified)' and 'B1a'.

[226] Assumed to comprise the floorspace within the recording category 'B1b'.

[227] Assumed to comprise the floorspace within the recording category 'B1c'.

[228] Assumed to comprise the floorspace within the recording category 'B2'.

[229] Assumed to comprise the floorspace within the recording category 'B8'.

Supply/demand balance

13.7 Once an adjustment for frictional vacancy (**paragraph 13.3**) and replacement of losses (dependent on use type per **paragraph 13.6** and **Table 13.1**), as well as the existing stock (including vacant supply) (**Table 8.2**) has been taken into account, the results from each of the scenarios presented above are adapted. The result is considered to be the net or overall need position resulting from each of the scenarios. A summary of the overall net requirement arising from each of the scenarios is shown in **Table 13.2**. These figures have been rounded. A full breakdown of the steps of the application of adjustments to the gross requirement for each scenario (including the unrounded results) is presented in **Appendix E**. In summary:

- **Scenario 1a – Labour demand** produces an overall net requirement for 285,000m^2 of total additional employment floorspace, which is equivalent to 13,600m^2 per annum over the study period to 2046. This would equate to approximately 57.1 ha, or 2.7 ha per annum to 2046.
- **Scenario 1b – Labour demand (aspirational)** produces an overall net requirement for 842,000m^2 of total additional employment floorspace, which is equivalent to 40,100m^2 per annum over the study period to 2046. This would equate to approximately 208 ha, or 9.9 ha per annum to 2046.
- **Scenario 2a – Labour supply** scenario produces an overall net requirement for 502,000m^2 of total additional employment floorspace, which is equivalent to 24,000m^2 per annum. This would equate to approximately 106 ha, or 5.0 ha per annum.
- **Scenario 2b – Labour supply (apportionment by current residence-based employment)** produces a total additional employment floorspace requirement of 675,000m^2, which is equivalent to approximately 32,000m^2 per annum over the study period to 2046. This would equate to approximately 167 ha, or 8.0 ha per annum to 2046.
- **Scenario 2c – Labour supply (apportionment by future residence-based employment)** produces a total additional employment floorspace requirement of 659,000m^2, which is equivalent to approximately 31,000m^2 per annum over the study period to 2046. This would equate to approximately 161 ha, or 7.7 ha per annum to 2046.
- **Scenario 3a – Past take-up** produces an overall net requirement for 460,000m^2 of total additional employment floorspace, which is equivalent to 22,000m^2 per annum. This would equate to approximately 119 ha, or 5.7 ha per annum.

Table 13.2 – The net requirement produced by each of the scenarios ranges from 285,000m^2 / 57.1 ha to 842,000m^2 / 209 ha

Supply/demand balance for the need scenarios

Scenario	Office	Research and development	Light industrial	General industrial	Storage and distribution	Total
Scenario 1a – Labour demand (m^2)	81,700	44,500	36,500	6,200	116,000	285,000
Scenario 1a – Labour demand (ha)	12.2	5.4	7.6	2.1	29.8	57.1

Scenario	Office	Research and development	Light industrial	General industrial	Storage and distribution	Total
Scenario 1b – Labour demand (m^2)	94,500	45,100	95,100	174,000	433,000	842,000
Scenario 1b – Labour demand (ha)	14.1	5.5	19.8	58.0	111	209
Scenario 2a – Labour supply (m^2)	139,000	51,400	61,000	25,000	226,000	502,000
Scenario 2a – Labour supply (ha)	20.8	6.3	12.7	8.2	57.9	106
Scenario 2b – Labour supply (m^2)	113,000	45,900	106,000	224,000	187,000	675,000
Scenario 2b – Labour supply (ha)	16.8	5.6	22.1	74.6	47.9	167
Scenario 2c – Labour supply (m^2)	111,000	42,800	94,500	187,000	224,000	659,000
Scenario 2c – Labour supply (ha)	16.5	5.2	19.7	62.4	57.5	161
Scenario 3a – Past	38,000	29,300	20,200	137,900	234,000	460,000

Scenario	Office	Research and development	Light industrial	General industrial	Storage and distribution	Total
take-up (m^2)						
Scenario 3a – Past take-up (ha)	5.7	3.6	4.2	46.0	60.1	119

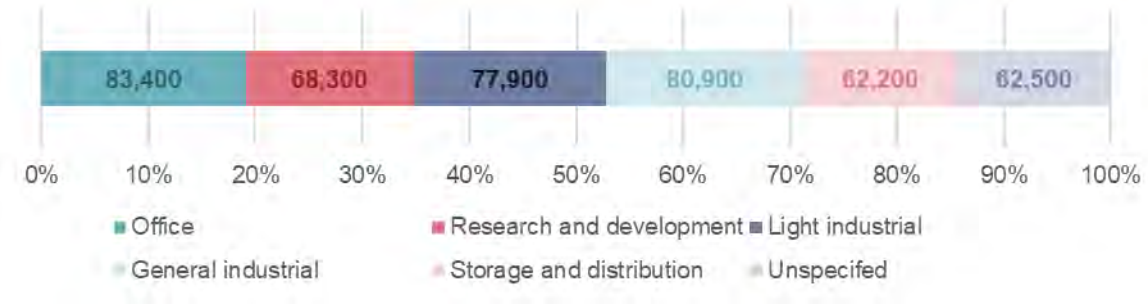
Pipeline

Planning pipeline

13.8 The planning pipeline comprises the floorspace for which: outline permission is granted; the floorspace is under construction; planning permission is granted but unimplemented; or the floorspace is contained within an allocated site. In sum, this represents the potential pipeline of floorspace that could come forward and contribute to the future supply of employment-generating floorspace. This reflects a broad mix of uses which would together deliver around 435,000m^2 (net) floorspace. In reality, it is unlikely that the entire pipeline would come forward as indicated below, however the amount of floorspace already in the pipeline may be useful for determining the scale of growth that could be supported in future.

Figure 13.2 – The pipeline of committed developments in Huntingdonshire (net) would bring forward a range of employment uses if fully delivered

Planning pipeline by potential net deliveries by floorspace type (m^2 and %)



Source: HDC, 2024. Huntingdonshire Business Completions and Commitments 2023/24. Volterra analysis.

13.9 Although the pipeline of development is broadly split between different uses, once average unit size is taken into account it is clear that fewer storage and distribution premises are likely in the pipeline compared to office developments. The presence of light and general industrial floorspace within permissions affirms the enduring demand for these types of spaces (**Section 8**).

13.10 When compared to the net need scenarios set out above, the total quantum of pipeline employment floorspace reflects a large proportion of the overall need generated by the scenarios, and indeed satisfies the labour demand scenario entirely. This is variable by use type however, given the pipeline for storage and distribution represents a small (unsatisfactory) proportion of the need generated by the scenarios,

whereas the pipeline of floorspace in uses such as light industrial are more closely aligned with overall need.

Table 13.3 – The pipeline of committed developments in Huntingdonshire would bring forward 435,000m^2 (net) of employment floorspace, of which 47,700m^2 is under construction

The pipeline of net deliveries by status (m^2)

Status	Office	R&D	Light industrial	General industrial	Storage and distribution	Un-specified	Total
Outline	40,100	61,200	63,100	38,700	22,900	59,400	285,000
Under construction	9,400	1,600	2,500	24,600	9,200	380	47,700
Un-implemented	30,600	2,200	8,000	19,900	30,100	2,700	93,400
Allocation	3,300	3,300	4,300	-2,300	0	0	8,700
Total	**83,400**	**68,300**	**77,900**	**80,900**	**62,200**	**62,500**	**435,000**

Source: HDC, 2024. Huntingdonshire Business Completions and Commitments 2023/24. Volterra analysis.

13.11 A portion of the pipeline could potentially come forward within existing allocated employment sites. Broadly, this would include a net delivery of 8,700m^2 of employment floorspace. The existing employment allocations which are not Established Employment Areas contain some capacity to accommodate further employment-generating development. After consideration of how development has come forward on these sites, as well as existing uses, there remains approximately 31 ha of undeveloped land within existing allocations. Where development has occurred on existing allocations, the degree to which planned employment uses are brought forward is variable; for example, Yax Pak has been successfully developed for the uses intended whereas Bearscroft Farm has instead been developed primarily for residential uses.

Table 13.4 – There is around 34 ha of undeveloped land within existing allocations

Existing employment allocations

Allocated site	Amount of employment land	Status
Bearscroft Farm, Godmanchester (HU16)	4.4 ha of land for employment uses (except class B8)	The allocation has been brought forward primarily for housing and 'non-B' use classes. It is unlikely that further B use classes will be developed given the current build out of the allocation.
St Neots East (SEL2)	22 ha of land for employment uses 3 ha local centre that would contain some offices	Development within this allocation is currently underway.
West of Railway, Brampton Rd, Huntingdon (HU4)	2 ha of land for business uses (former class B1a and B1b)	The allocation is currently undeveloped, in use as a car

Allocated site	Amount of employment land	Status
		park servicing the adjacent Huntingdon station.
Park View Garage, Brampton (HU13)	0.4 ha of land for light industrial use	The allocation is currently in use as for car sales, repair and wash operations.
Yax Pak, Yaxley (YX2)	3.2 ha of land for business uses (former class B1) or general industrial use (class B2)	The allocation has been developed for employment use.
South of Bicton Industrial Estate, Kimbolton (KB3)	1.3 ha of land for light industrial business use	The allocation remains undeveloped.
Giffords Farm, St Ives (SI3)	5.6 ha of land for employment use except offices and storage and distribution	The allocation remains undeveloped.

13.12 Given that there is some uncertainty about the likelihood of the pipeline in its entirety being implemented, it has not been included in the overall net need position. Therefore, HDC should consider delivery of the pipeline (through its ongoing monitoring) against the overall need figure set out.

14. Sensitivity testing

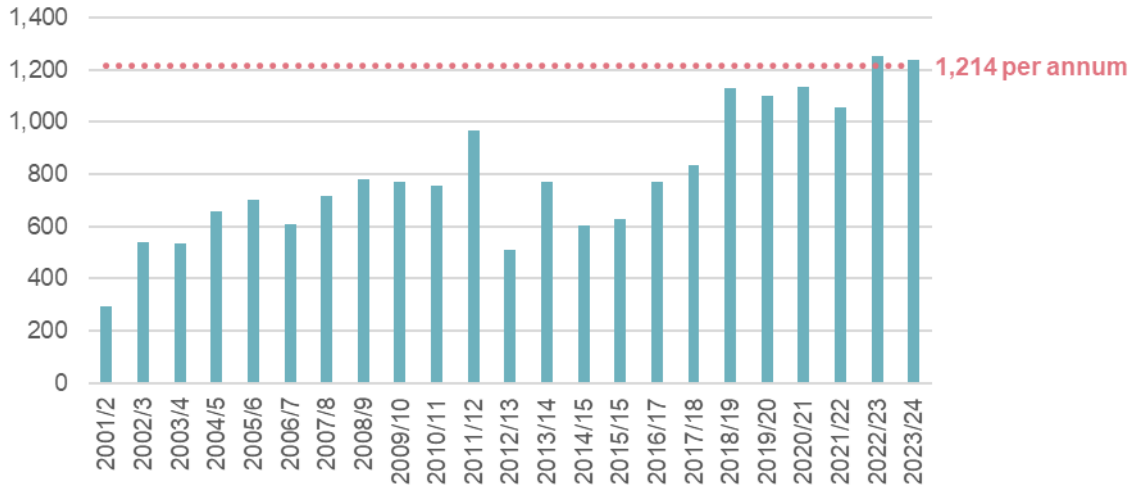
14.1 The need net position is related to the assumptions which underpin the assessment, and it is important to understand the degree to which these assumptions could influence the outcomes. This illustrates whether the assumption is impactful on the overall results, and suggests how further research and monitoring over the Plan period would mean that alternative hypothetical trajectories such as set out below could be being tracked.

Different assumptions about the housing trajectory

14.2 The labour supply scenarios (2a, 2b, and 2c) are underpinned by the housing delivery trajectory derived from the housing need assessment. A greater or lesser amount of housing delivered in Huntingdonshire over the Plan period will mean there is a higher or lower population, and therein labour supply, than originally tested. The new Standard Method produces a need for 1,214 homes per annum. Net housing delivery in the latest two years for which data is available slightly exceeded the need figure, as shown in **Figure 14.1**.[230] Net housing delivery is following an increasing trend over time.

Figure 14.1 – Net housing delivery is currently in line with the need generated from the Standard Method

Net additional dwellings (2001/2 – 2023/24) compared to new Standard Method need



Source: Ministry of Housing, Communities and Local Government, 2024. Live tables on housing supply: net additional dwellings. Table 122: housing supply; net additional dwellings, by local authority district, England.

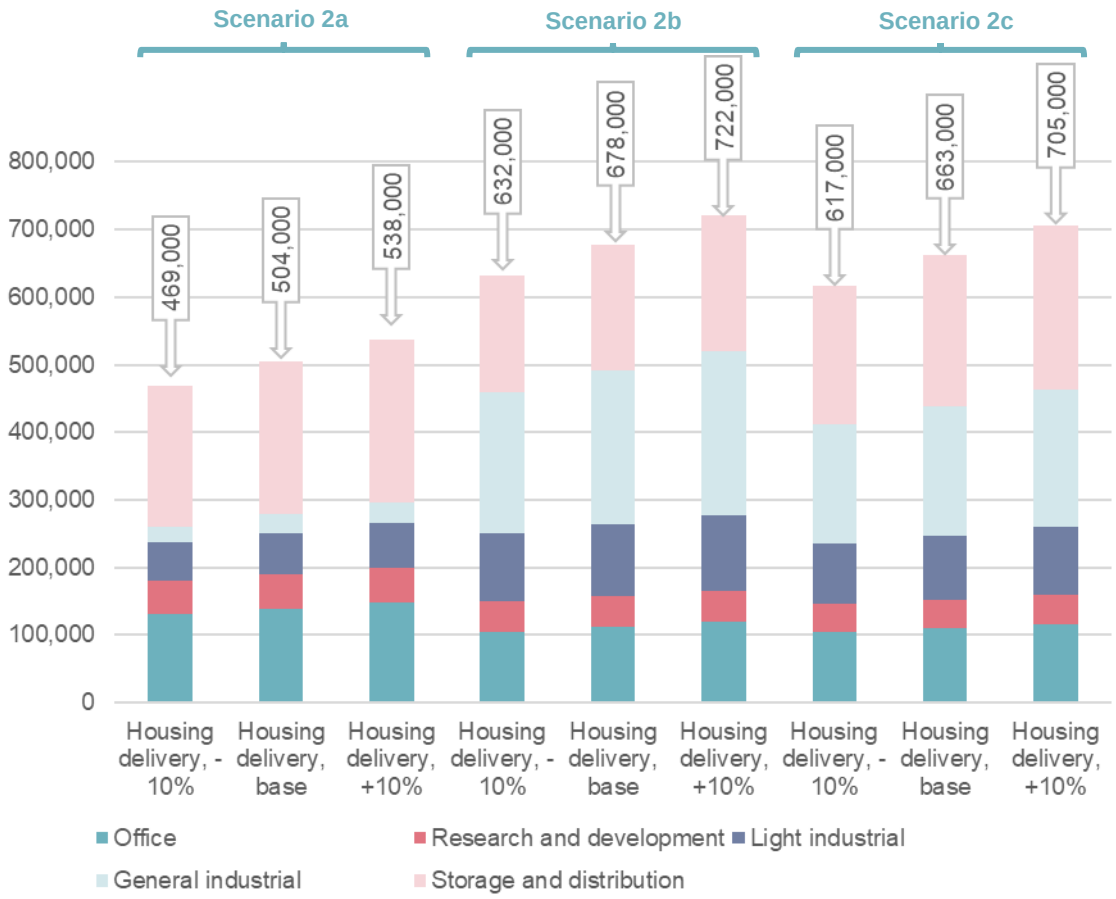
14.3 The sensitivity of the labour supply need scenarios is tested through adjustments to the labour supply that would result from delivery of housing which is 10% below per annum need, and 10% higher than per annum need. In all scenarios, the need requirement scales with the housing delivery trajectory, i.e higher housing supply produced higher employment use need, and vice versa. Any delivery of housing which exceeds the

[230] Ministry of Housing, Communities and Local Government, 2024. Live tables on housing supply: net additional dwellings. Table 122: housing supply; net additional dwellings, by local authority district, England.

Standard Method (1,214 dwellings per annum) derived labour supply (on which scenarios 2a – 2c are based), would require additional floorspace and land to that reported.

Figure 14.2 – The labour supply is tied to housing delivery such that delivery of housing above the Standard Method need figure would require additional employment land supply

Sensitivity of labour supply scenarios to higher and lower housing delivery than core assumption. Net need position following a 10% deduction and 10% increase to housing delivery versus Standard Method (m^2)



Source: Volterra analysis.

Different assumptions about employment density

Changes in working practices might mean that offices can support a higher amount of employment

14.4 A core assumption of the modelling is that office premises accommodate one FTE per 13m^2 of floorspace. This benchmark was selected because of the types of premises observed as part of the site surveying.[231] This also reflects a conservative approach which would be at less risk of underestimating the requirement for office space. The previous discussion within the report noted how changes in working practices, such as hybrid and homeworking, are affecting how occupiers use office space. The use of employment densities to derive space requirements is problematised by hybrid working models which affect the utilisation of space. There is insufficient evidence to confirm precisely how different utilisation models affect overall employment density of office space, and the appropriateness and achievability of higher densities will depend on a number of factors particular to different occupiers, such as the proportion of desk space to other/flexible areas, peak daily demand and homeworking prevalence.

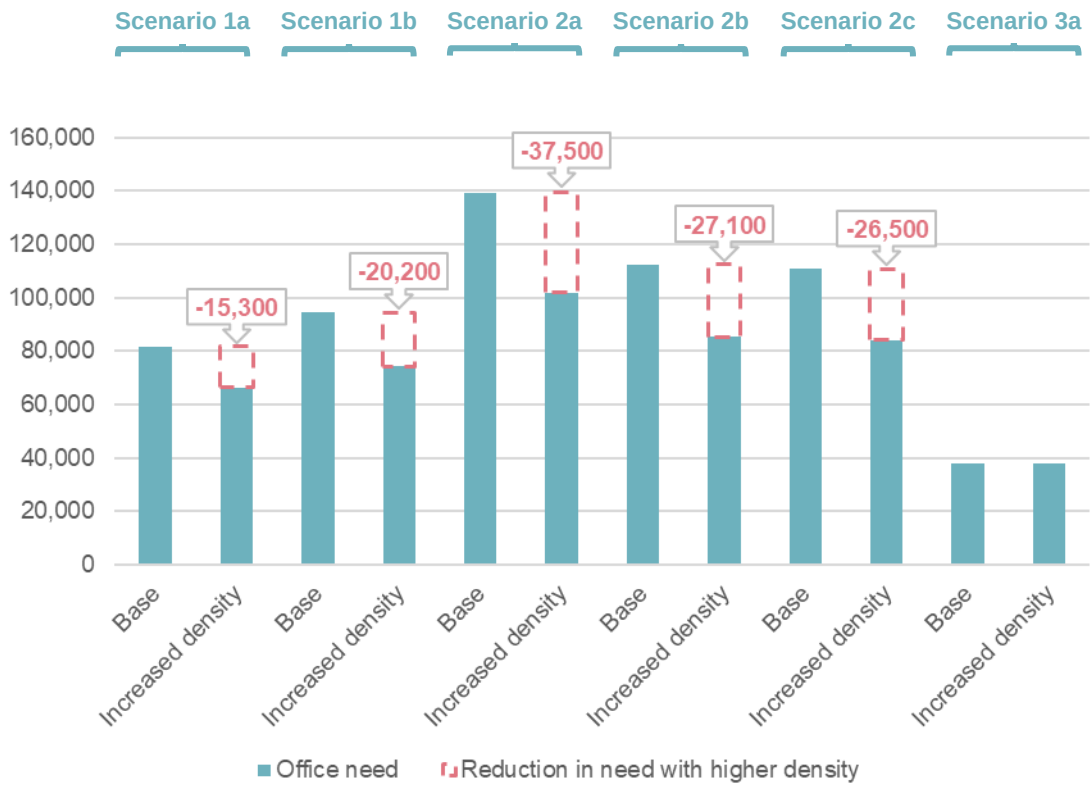
14.5 To test the sensitivity of the scenarios to a higher employment density of office space, the effect of a higher employment density (8m^2 per FTE is the highest figure provided in the HCA Employment Densities Guide) has been tested.[232] In all scenarios which are derived using employment density (all except the past take-up scenario), the requirement for office space naturally reduces as the employment density increases. The reduction in demand ranges from -15,300m^2 to -37,400m^2 depending on the baseline starting point. In each of these scenarios, the reduced need figure represents only a small proportion of the respective overall need, suggesting that the influence of higher employment density is only slightly impactful on the need presented. This should be monitored over time to reflect emerging working practices.

[231] HCA Employment Densities guidance gives ready reckoner densities for different types of offices, ranging from: call centres (8 sqm NIA per FTE), finance and insurance (10 sqm NIA per FTE), professional services (12 sqm per FTE) to corporate (13 sqm NIA per FTE). During the site surveying, it was observed that there was a strong presence of low density business park type offices which are likely to have lower employment densities.

[232] Homes and Communities Agency, 2015. Employment Density Guide – 3rd edition.

Figure 14.3 – A higher office employment density due to efficient utilisation of space given hybrid working models would reduce the floorspace need for office premises across all scenarios

Sensitivity of all scenarios to a higher office employment density (m^2)



Source: Volterra analysis.

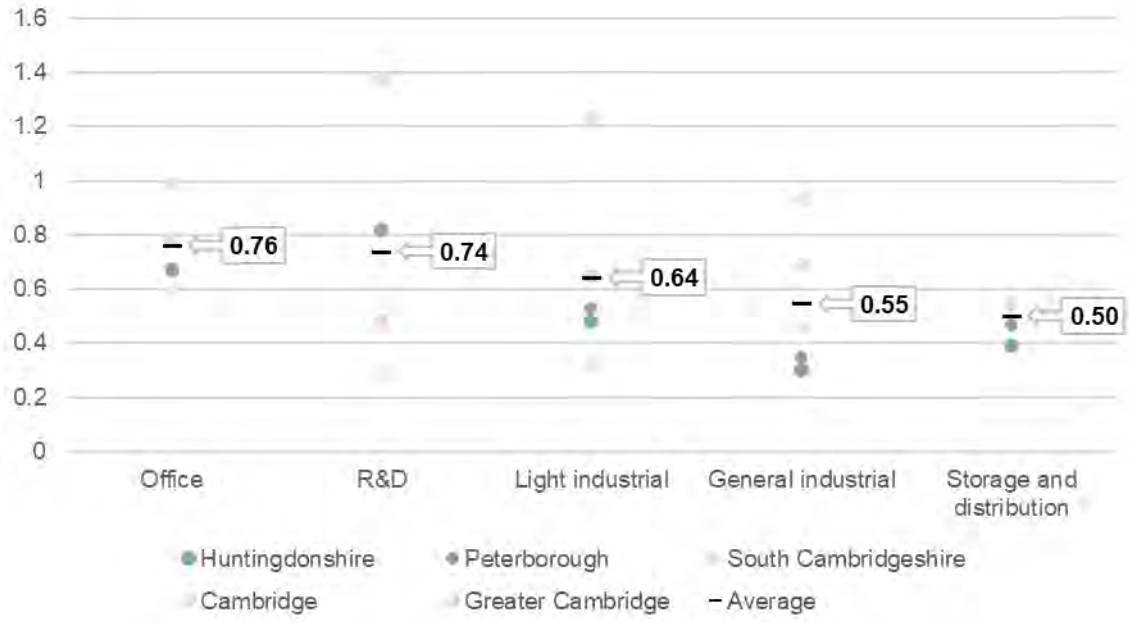
Different assumptions about plot ratios

14.6 The plot ratio refers to the relationship between the amount of floorspace and the plot size (land area) which accommodates it. It is reflective of the intensity of land use, and differs by employment use type. For the purposes of the assessment, the average plot ratio for Huntingdonshire by use type is used to derive the amount of land that would be expected to be required to accommodate the projected floorspace need. The approach uses CoStar data to analyse typical plot ratios in Huntingdonshire, rather than applying benchmarks. This analysis is conducted for neighbouring areas to contextualise understanding of the average plot ratios in Huntingdonshire, and test the sensitivity of the scenarios to applying a different plot ratio in terms of the land need presented.

14.7 **Figure 14.4** shows that the average plot ratios for Huntingdonshire which are used in the assessment broadly align with the what is typical for some of the neighbouring local authority/planning areas, which provides confidence that the resulting land need is robustly related to the floorspace requirement. The wider average plot ratios for industrial uses are however slightly lower in Huntingdonshire (i.e. lower land use intensity) than the comparator areas (likely reflecting the more rural and less land constrained context than the more urban areas it is being compared to), and it has been tested how applying the average for these areas to this assessment would affect the results.

Figure 14.4 – The average plot ratios in Huntingdonshire align well with the average for the surrounding areas

Average plot ratios



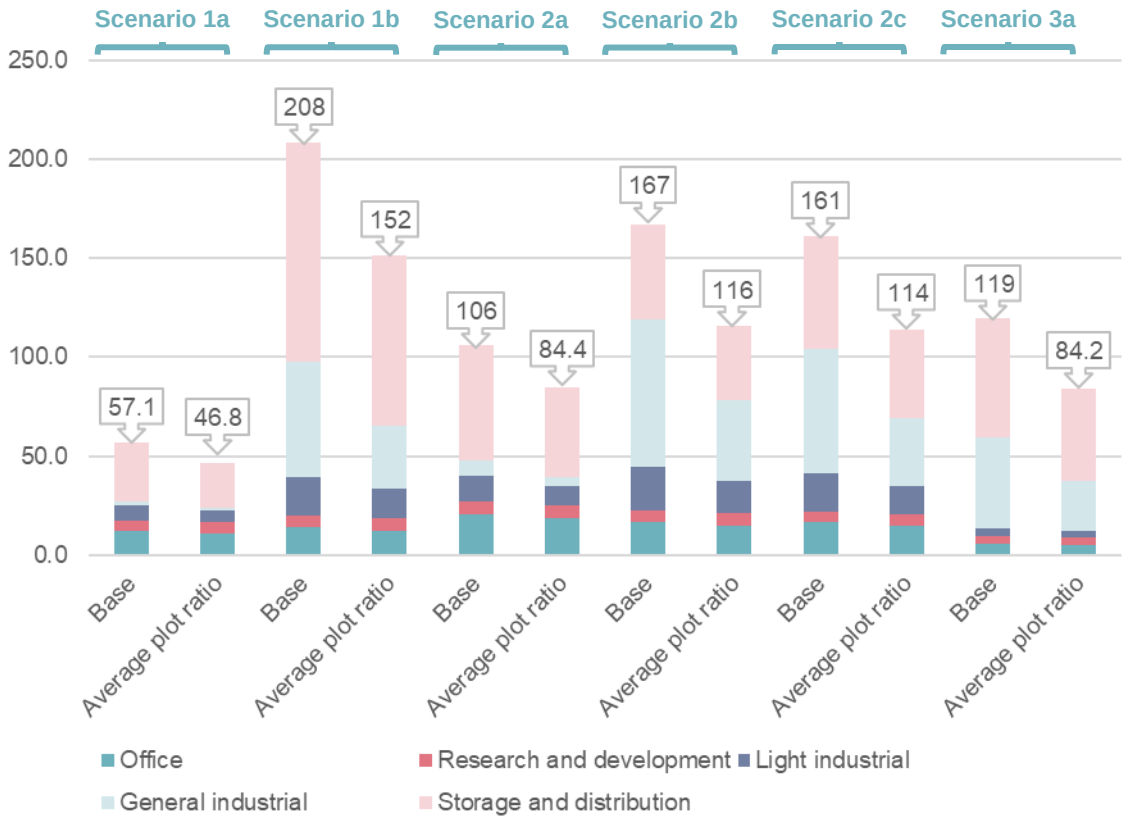
Source: Volterra analysis of CoStar data.

14.8 Across all scenarios, the land requirement is reduced if the wider average plot ratios is applied. This is primarily driven by a hypothetically higher land use intensity for general industrial uses. Compared to the existing stock, this type of industrial intensification would result from premises being brought forward which potentially: support denser forms of development such as advanced manufacturing, data centres, and life science labs; are less reliant on large vehicle access and have lower servicing demands; could potentially operate making use of multiple storeys; follow a planning approach that favours reuse/densification of existing sites.

14.9 There is a broad alignment overall between the plot ratios used in the assessment and those reported for neighbouring areas, however the proposals presented to HDC for new employment areas could have considerably different plot ratios due to several factors including environmental mitigation and constraints (relief, flood risk, and so on). Accordingly, each site will be different due to these factors, but by providing the floorspace (m2) and land (ha) need figures within this study, HDC will be able to judge which figure is most helpful/appropriate for planning purposes. The approach should enable flexibility (**section 16**).

Figure 14.5 – Applying the average plot ratio for the surrounding areas brings the overall requirement for land area down

Sensitivity of all scenarios to a generic plot ratio (ha)



Source: Volterra analysis.

A higher replacement for losses for general industrial space

14.10 In addition to the core scenarios, a further sensitivity test is undertaken that applies a higher replacement rate for general industrial (B2) uses. The central scenarios apply standard replacement assumptions of 25% for offices, and research and development, and 50% for light industrial, general industrial and storage and distribution. These rates are held constant across all sensitivities. However, there is a case for exploring a higher replacement figure specifically for general industrial uses.

14.11 Historic completions data shows that 10- and 15-year average delivery rates for general industrial space exceed those implied by any of the current forecast scenarios.[233] This suggests that gross demand for new

[233] CoStar, 2025.

industrial premises, including to replace lost or obsolete space, may be greater than what the central modelling scenarios capture.

14.12 There is also continued pressure on industrial land from conversions to other uses and policy-driven redevelopment. Coupled with the growing need for flexible industrial space to support light manufacturing, logistics and local services, this supports testing a higher replacement assumption to reflect a more precautionary position.

14.13 This sensitivity test applies a 75% replacement rate for general industrial, while retaining the standard assumptions for other use classes. The purpose is to isolate the effect of stronger replacement pressure on overall land needs. It allows us to test what level of additional provision may be appropriate if the recent pattern of floorspace turnover continues and policy aspirations seek to retain industrial capacity.

14.14 The 75% replacement factor for general industrial land reflects the significant risk of obsolescence, with approximately 78% of general industrial floorspace projected to be non-compliant with MEES regulations by 2030 if an EPC B standard is implemented (**Section 0**). While some premises will be upgraded, much older or lower-value stock may fall out of use. This higher replacement rate accounts for likely losses while acknowledging that some space will remain in use through refurbishment, providing a balanced and future-proof basis for planning.

14.15 The results of this test are presented in **Table 14.1**. They show the potential uplift in general industrial land requirements under a higher replacement assumption, which may be useful in informing land supply buffers, strategic allocations or safeguarding decisions.

Table 14.1 – General industrial replacement for losses sensitivity test

Scenario	General industrial land requirement (core modelling of 50% replacement rate) (ha)	General industrial land requirement (core modelling of 50% replacement rate) (m^2)	General industrial land requirement (sensitivity modelling of 75% replacement rate) (ha)	General industrial land requirement (sensitivity modelling of 75% replacement rate) (m^2)
1a – Labour demand	2.1	6,000	10.4	31,000
1b – Labour demand (aspirational)	58.0	174,000	66.4	199,000
2a – Labour supply	8.2	25,000	16.6	50,000
2b – Labour supply (apportionment by current residence-based employment)	74.6	224,000	82.9	249,000
2c – Labour supply (apportionment by future residence-based employment)	62.4	187,000	70.7	212,000

Results of sensitivity tests

14.16 The results of the sensitivity tests are shown in comparison to the core modelling in **Table 14.2** overleaf. The sensitivity testing does not feed into the overall scenario results, however it is conducted in order to illustrate whether changing the assumptions would be impactful on the overall results of the modelling. If conditions change over the Plan period (relating to prevailing employment densities, housing delivery rates etc.), the results of the sensitivity testing would be insightful for understanding how the overall need for employment floorspace/land could be different.

Table 14.2 – Sensitivity tests demonstrate how the input assumptions/conditions could affect overall need over the Plan period

Scenario	1a	1b	2a	2b	2c	3a
Office						
Core modelling (m^2)	81,700	94,500	139,000	113,000	110,000	38,000
Core modelling (ha)	12.2	14.1	20.8	16.8	16.5	5.7
Housing delivery -10% (m^2)			131,000	105,000	104,000	
Housing delivery -10% (ha)			19.5	15.7	15.5	
Housing delivery +10% (m^2)			148,000	119,000	117,000	
Housing delivery +10% (ha)			22.1	17.8	17.6	
High office employment density (m^2)	66,400	74,300	102,000	85,400	84,300	38,000
High office employment density (ha)	9.9	11.1	15.2	12.7	12.6	5.7
Wider average plot ratio (ha)	10.7	12.4	18.3	14.8	14.5	5.0
Research and development						
Core modelling (m^2)	44,500	45,100	51,400	45,900	42,800	29,300
Core modelling (ha)	5.4	5.5	6.3	5.6	5.2	3.6
Housing delivery -10% (m^2)			50,300	45,300	42,500	
Housing delivery -10% (ha)			6.1	5.5	5.2	
Housing delivery +10% (m^2)			52,400	46,400	43,100	
Housing delivery +10% (ha)			6.4	5.7	5.3	

Scenario	1a	1b	2a	2b	2c	3a
Wider average plot ratio (ha)	6.0	6.1	6.9	6.2	5.8	4.0
Light industrial						
Core modelling (m^2)	36,500	95,100	61,000	106,000	94,500	20,200
Core modelling (ha)	7.6	19.8	12.7	22.1	19.7	4.2
Housing delivery -10% (m^2)			57,200	100,000	89,600	
Housing delivery -10% (ha)			11.9	20.9	18.7	
Housing delivery +10% (m^2)			64,900	112,000	99,400	
Housing delivery +10% (ha)			13.5	23.4	20.7	
Wider average plot ratio (ha)	5.7	14.8	9.5	16.6	14.7	3.1
General industrial						
Core modelling (m^2)	6,200	174,000	25,000	224,000	187,000	138,000
Core modelling (ha)	2.1	58.0	8.2	74.6	62.4	46.0
Housing delivery -10% (m^2)			21,400	208,000	176,000	
Housing delivery -10% (ha)			7.1	69.5	58.5	
Housing delivery +10% (m^2)			30,600	243,000	204,000	
Housing delivery +10% (ha)			9.4	79.7	66.3	
Higher general industrial replacement rate (ha)	10.4	66.4	16.6	82.9	70.7	
Wider average plot ratio (ha)	1.1	31.9	4.5	41.0	34.3	25.2

Scenario	1a	1b	2a	2b	2c	3a
Storage and distribution						
Core modelling (m^2)	116,000	433,000	226,000	187,000	224,000	460,000
Core modelling (ha)	29.8	111	57.9	47.9	57.5	119
Housing delivery -10% (m^2)			209,000	172,000	206,000	
Housing delivery -10% (ha)			53.6	44.2	52.8	
Housing delivery +10% (m^2)			242,000	201,000	242,000	
Housing delivery +10% (ha)			62.1	51.6	62.1	
Wider average plot ratio (ha)	23.2	86.5	45.1	37.3	44.8	46.9

15. Preferred scenario

15.1 The EENA develops and tests a range of scenarios (see **Section 12** and **Appendix E**) with the purpose of improving the robustness of the assessment and confidence in the findings (triangulation). Each of the scenarios nonetheless is based on assumptions and different visions put forward for how Huntingdonshire will develop over time. Whilst this is useful for grasping how different eventualities would affect need, for effective planning it is necessary to establish a preferred scenario so that planning policies can be aligned.

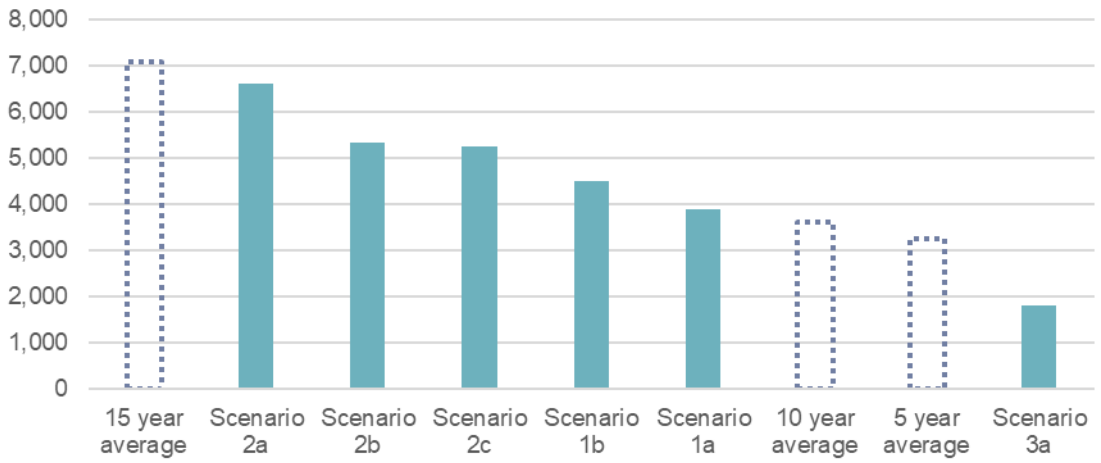
What has previously been achieved?

15.2 Historic deliveries are indicative of the amount of floorspace which has successfully been constructed. This is influenced by planning policy and decision-making applicable at the time, but also wider market conditions including viability. Comparison of the need generated by the scenarios with what has previously been achieved is a useful sense check for the magnitude of per annum delivery required to meet the total target.

15.3 With the exception of the scenario based on past take-up, most of the scenarios produce a per annum delivery requirement for offices which falls between the range of the average per annum delivery rates over the previous five to 15 years for which delivery data is available. An additional observation, however, is that the average per annum delivery has been declining over time, as shown by the lower delivery rates in the most recent five years.

Figure 15.1 – Most scenarios generate an average per annum delivery rate for offices which is higher than the 5- and 10-year average delivery

Comparison of historic average office deliveries to need scenarios (m^2, per annum)

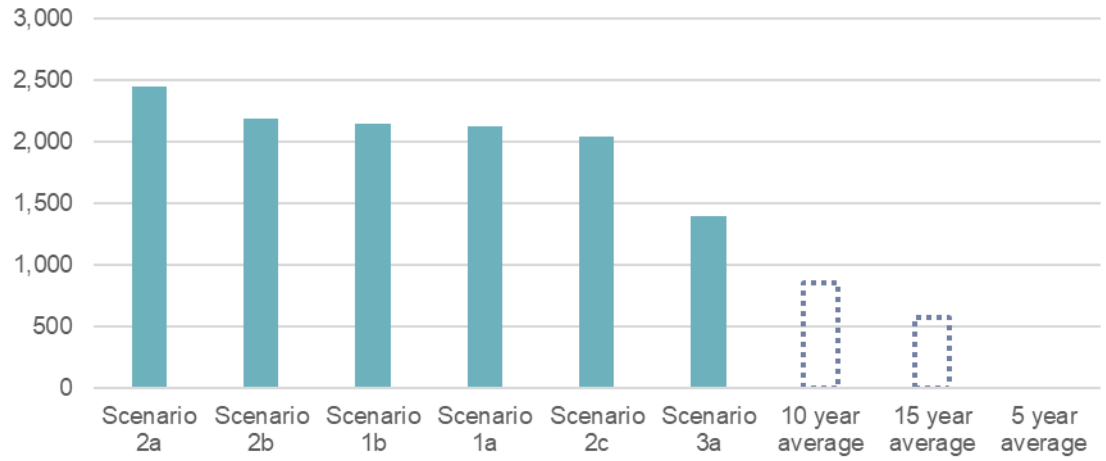


Source: HDC, 2024. Huntingdonshire Business Completions and Commitments 2023/24.

15.4 In a typical year, there has been little to no delivery of research and development floorspace in Huntingdonshire. This means that all of the scenarios produce a need requirement which is higher than the average past delivery. Most of the scenarios, however, are aligned with each other in terms of the magnitude of per annum need.

Figure 15.2 – Every need scenario generates need for research and development space which exceeds what has been delivered over the last 15 years

Comparison of historic average research and development deliveries to need scenarios (m^2, per annum)

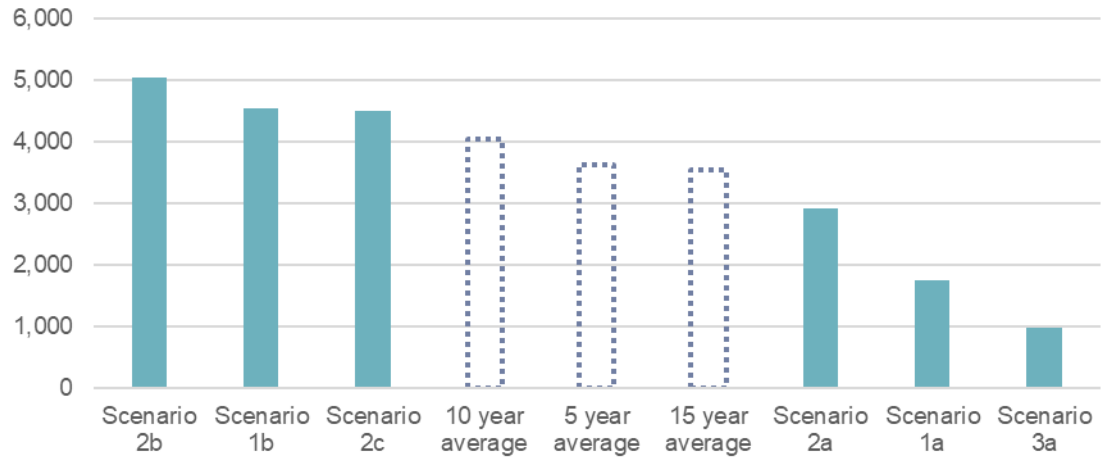


Source: HDC, 2024. Huntingdonshire Business Completions and Commitments 2023/24.

15.5 In terms of light industrial floorspace the scenarios describe a magnitude of per annum need which is both above and below the achieved delivery over the periods considered. This observation would suggest that some scenarios may underestimate need compared to the apparent deliverability of light industrial floorspace.

Figure 15.3 – Historic deliveries of light industrial floorspace falls within the range of need produced by the assessed scenarios

Comparison of historic average light industrial deliveries to need scenarios (m^2, per annum)

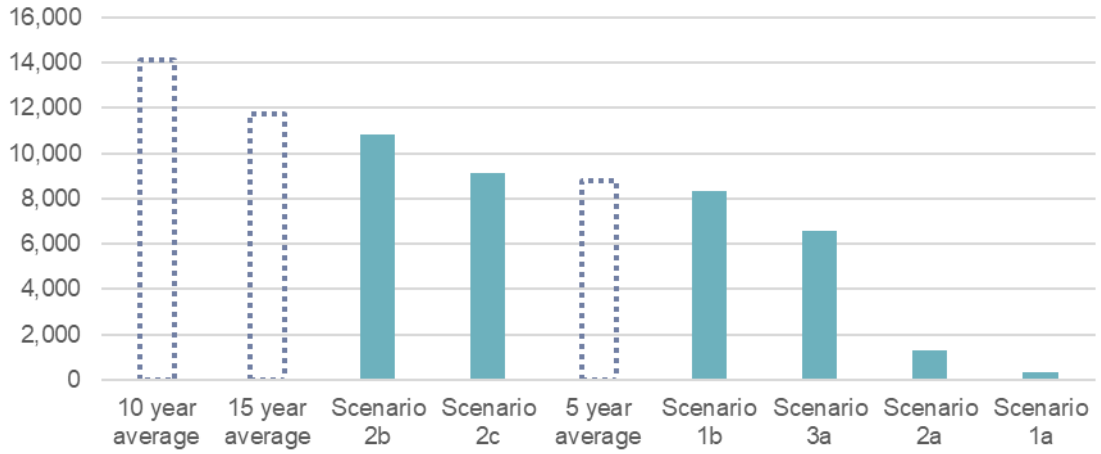


Source: HDC, 2024. Huntingdonshire Business Completions and Commitments 2023/24.

15.6 For general industrial floorspace, deliveries over the periods considered indicate that a much larger volume of space has been successfully delivered than is anticipated by the scenarios to be needed over the Plan period. This gives confidence in the hypotheses that underpin the adjusted scenarios that the drivers of demand for B2 space (namely primarily manufacturing, food processing and service type businesses) warrant closer attention, and that the forecasts may not fully reflect the current reality. The delivery of general industrial space has however reduced on average over time. Most of the adjusted scenarios, as well as past-take up based scenario are similar in magnitude to the achieved delivery in the latest five years for which data is available.

Figure 15.4 – Historic delivery of general industrial space tends to exceed the need requirement generated by the scenarios

Comparison of historic average general industrial deliveries to need scenarios (m^2, per annum)

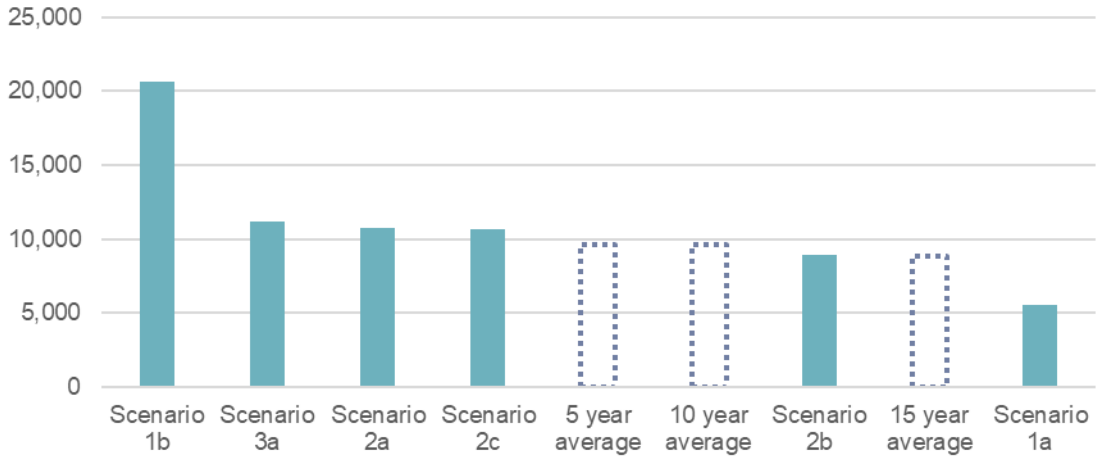


Source: HDC, 2024. Huntingdonshire Business Completions and Commitments 2023/24.

15.7 Each of the scenarios produce a need for storage and distribution space which closely aligns with what has been achieved in recent years. This gives confidence in the achievability of delivering against the need target if selected. It is demonstrated in **Figure 15.5** that to deliver against the high aspirational scenario (1b), the average per annum delivery would need to increase.

Figure 15.5 – There is good alignment between the need scenarios and the historic delivery of storage and distribution space; the step change in average per annum delivery to achieve the higher aspirational scenario is demonstrated

Comparison of historic average storage and distribution deliveries to need scenarios (m^2, per annum)



Source: HDC, 2024. Huntingdonshire Business Completions and Commitments 2023/24.

Towards a preferred scenario

15.8 The scenario testing undertaken in this assessment provides a robust foundation for understanding the range of potential employment land needs in Huntingdonshire. However, for the purposes of forward planning and policy alignment, it is necessary to identify a preferred scenario that reflects both deliverability and ambition. This should be informed by historic delivery patterns, strategic growth objectives and sector-specific dynamics.

15.9 Based on the comparative analysis, Scenario 2b, which apportions labour supply growth by current residence-based employment, emerges as a balanced and realistic foundation for most use classes. It reflects the scale of change implied by population growth and commuting patterns, while broadly aligning with what has been delivered across office, research and development, and light and general industrial floorspace in recent years. This approach also ensures consistency in planning for jobs and housing in line with demographic shifts.

15.10 For storage and distribution uses, there is a stronger case for adopting the higher growth Scenario 1b. Historic delivery of logistics space has been strong, and the sector is supported by significant infrastructure improvements and market signals indicating unmet demand. Scenario 1b reflects these factors, offering a suitably aspirational yet achievable target for this strategically important use class. The delivery of storage and distribution space could also bring forward co-located space across the other use types considered in the study.

15.11 In summary, the recommended preferred approach would combine Scenario 2b for all use types except storage and distribution, where Scenario 1b is adopted. This hybrid approach recognises the strengths and distinct characteristics of different parts of the local economy while supporting a spatial strategy that is grounded in deliverability and ambition. It provides a strong platform for aligning employment land allocations with Huntingdonshire's long term growth trajectory.

15.12 The final results of the preferred scenario are presented in the table below. The preferred scenario would be associated with a change of employment of 14,400 jobs (FTEs) across core employment uses.

Table 15.1 – Employment floorspace and land recommended targets over the Plan period in the preferred scenario (rounded)

Employment use	Floorspace target (m^2)	Land target (ha)
Office	113,000	16.8
Research and development	45,900	5.6
Light industrial	106,000	22.1
General industrial	224,000	74.6
Storage and distribution	433,000	110.9
Total	**922,900**	**230**

How does the preferred scenario compare to the pipeline?

15.13 A discussion of the pipeline is provided in **Section 13**, where it is highlighted that according to the latest commitments data from HDC there is approximately 435,000m^2 of employment floorspace in the pipeline; around 47,700m^2 of which is already under construction and can therefore be considered to be highly likely to come forward successfully. This total can be broken down by the applicable use class under construction and compared to the recommended target of the preferred scenario. The respective employment space currently under construction is equivalent to 8% of the office target, 4% of the research and development target, 2% of the light industrial target, 11% of the general industrial target, and 2% of the storage and distribution target.

15.14 The remainder of the pipeline is considered to be variably likely to come forward. It can be stated with some certainty that the remainder of the pipeline will not come forward in its entirety. Likewise, it can be confidently stated that a considerable portion of the pipeline *will* come forward, which would increase the contribution towards the target further than that stated above. Those applications within allocations (2% of the overall pipeline floorspace) and with outline permission (66% of the overall pipeline floorspace) are more likely than those unimplemented permissions to come forward. Even if a conservative amount of the pipeline comes forward, a significant contribution to the overall recommended target for the Plan period between 2025 and 2046 would be made.

15.15 The pipeline includes around 83,400m^2 of office floorspace, which is a greater quantum than for any other type. Not only does this reflect a significant portion of the need identified over the Plan period, but reflects a clear appetite for future delivery of office space, which would not be expected to stall such that the target need would become unachievable.

15.16 The small portion of the pipeline coming forward within allocations points towards an approach that safeguards additional sites with the aim to encourage new development and give capacity for the churn and renewal of the stock within allocations. The supply assessment finds the redevelopment and intensification potential of many of the existing allocations to be low suggesting the existing sites may not be sufficient to significantly contribute towards the preferred scenario target.

16. Conclusions and recommendations

Conclusions

16.1 The discussion within the EENA reveals a dynamic economic picture shaped by a growing yet ageing population, evolving sector strengths (**Section 7**), and transformative infrastructure projects (**Section 11**). Key findings cover the labour market, business base (**Section 7**), sectoral needs (**Section 9**), and commercial property market (**Section 8**). They also explore the impacts of infrastructure and demographic change, all within the context of Huntingdonshire's FEMA overlapping with nearby districts (**Section 6**). Taken together, the evidence underscores both opportunities and challenges for sustainable and inclusive growth in the district.

16.2 Huntingdonshire benefits from high employment and economic activity rates, but has a lower proportion of highly-qualified residents than the FEMA average (33% with NVQ4+ compared to a FEMA average of 36%). At the same time, it has a slightly lower proportion of people with no qualifications than geographic comparator areas, indicating a predominantly mid-skilled workforce. Commuting patterns highlight a dual role. The district draws in workers for manufacturing and service jobs, but also sees many residents commute to higher-paying jobs in Cambridge, London, and Peterborough. This points to untapped local talent if skilled residents currently travel outside the district for "good jobs." There is evidence of skills mismatches. For example, Huntingdonshire's important advanced manufacturing sector faces an ageing skilled workforce without enough younger replacements, and employers report a deficit in training aligned to industry needs. A related concern is the declining working age share of the population (a growing portion of residents are retired or nearing retirement), which could constrain labour supply over the long term (although the labour supply forecasts are more positive about the absolute growth in the working age population). These trends underscore the need to both attract younger workers and upskill the existing labour force to support growth. Ensuring that economic growth translates into local employment (and not just more out-commuting) will be critical. The delivery of (now higher) housing targets would lead to an additional labour supply that could be beneficial in this regard.

16.3 The district's business base is home to a healthy amount of SMEs, including many rural and home-grown businesses. This entrepreneurial base yields a strong rate of new enterprise births (around 735 in 2023) although start-up rates lag slightly behind national levels. Major sectoral strengths include manufacturing and engineering, logistics and distribution, construction, and a range of services. Manufacturing remains a larger share of employment in Huntingdonshire than in the wider FEMA economy, for example, making the district an important part of the regional industrial supply chain. The logistics and warehousing sector is another cornerstone, capitalising on the district's strategic location on the A1/A14 corridor. E-commerce growth has driven sustained demand for logistics space, which is a trend likely to continue.

16.4 Huntingdonshire is positioning to capture more of the high-value knowledge economy. It sits between the innovation hub of Greater Cambridge and the more industrial economies of Peterborough and the Fens, effectively bridging these two economic powerhouses. This geography presents an opportunity to develop niche clusters: for instance, agri-tech (leveraging the district's rural and agricultural context and proximity to Cambridge research institutions), and advanced manufacturing/R&D (building on existing expertise and spillovers from Cambridge's tech cluster). The Alconbury Enterprise Zone was intended to be central to this strategy. Alconbury's success to date has been modest but it remains a critical asset for attracting inward investment. Other employment hubs include the market towns of Huntingdon, St Neots, and St Ives each with established industrial estates and emerging innovation initiatives. A tension exists between concentrating growth in these urban centres to exploit agglomeration and infrastructure versus spreading

growth to smaller settlements to boost rural economies. The rural economy, while accounting for a smaller share of jobs, is notable for its lower productivity and reliance on small businesses. This urban–rural divide highlights the need to improve rural access to better employment and services so that prosperity is more evenly shared.

16.5 The property market assessment (**Section 8**) finds a generally tight market with low vacancy in quality premises and signs of pent-up demand for certain use types. Modern floorspace, particularly Grade A offices, tech labs, and modern small industrial units, is in short supply, while some older industrial stock is ageing and nearing obsolescence. Notably, the Council's declaration of a Climate Emergency and upcoming MEEs regulations will render a large portion of older stock non-compliant by 2030. It is estimated that over 50% of Huntingdonshire's non-domestic space could become unlettable by 2028, rising to approximately 80% by 2030 if energy performance requirements move to EPC B. This looming wave of functional obsolescence is a serious concern, but it also presents an opportunity to redevelop and 'green' the supply of employment space, replacing inefficient buildings with modern, low-carbon workspace (**Section 0**).

16.6 In terms of quantitative need, the EENA's forecasts and scenarios indicate significant demand for certain uses. Office-based and R&D sectors are expected to grow, and storage and distribution demand is expected to continue to be strong, while the future demand for general industrial space demand is found to be more uncertain through the baseline forecasts. However, past trends show Huntingdonshire has outperformed forecast expectations in some industrial sectors, suggesting caution in assuming long-term decline. The EENA models six employment growth scenarios to 2046 using labour demand, labour supply and past take-up approaches. These scenarios generate a range of employment land requirements from as low as around 2.7 hectares per year under the baseline labour demand scenario (1a) to as high as approximately 9.9 hectares per year under the most aspirational labour demand scenario (1b). Most scenarios fall between 5 and 8 hectares per year. For comparison, the previous 2014 Employment Land Study recommended allocating approximately 42 to 46 hectares gross (1.7 – 1.8 hectares per year) up to 2036 in addition to the Alconbury Enterprise Zone site. That target was not fully achieved, partly due to reliance on a single large site and slower than expected take-up. The economic growth opportunities and infrastructure improvements coming forward suggest there is renewed potential to meet higher demand if the right sites are made available (**Section 0**).

16.7 Infrastructure upgrades are expected to drive more transformational growth in Huntingdonshire. The A14 improvements have already enhanced east to west road movement, and the A428 dualling will complete a fast route between Cambridge and the M1, benefiting residents and businesses. St Neots will gain better connections to Cambridge, Bedford and Milton Keynes, making it more attractive for logistics, light industry and office development. The East West Rail project, with a new station at Tempsford, will improve rail access across the region and may shift commuting and investment patterns. Further north, the A141 bypass could ease congestion around Huntingdon and unlock development at RAF Wyton. Other planned upgrades include the East Coast Main Line, the Fens Reservoir and improved digital infrastructure. These projects will boost the district's economic appeal but may concentrate growth near key transport hubs, raising challenges for more rural areas (**Section 0**).

16.8 There is an urban–rural tension between focusing development in well-connected towns versus supporting the rural hinterland. The latter has lower productivity but also housing affordability and untapped labour, so a balance is needed to avoid widening geographic inequalities. There is a sectoral trade-off between land-hungry but lower employment density uses like big-box logistics versus higher employment density offices/R&D that require skilled labour and infrastructure. On balance, a diverse portfolio is needed to ensure resilience. Spatially, reliance on one or two large sites to bring forward additional employment floorspace (as in the past) could be seen as placing 'eggs in one basket'. A site safeguarding/allocation approach should comprise multiple sites for flexibility. This should comprise a mixture of larger sites suitable for strategic regional demand/occupiers, as well as smaller sites for SMEs and local businesses. Another challenge is reconciling economic growth with environmental limits, for example, expanding road-based logistics versus managing carbon emissions, or developing greenfield sites versus conserving agricultural land and meeting zero-carbon goals.

16.9 After comparing and considering the scenarios and accounting labour demand, labour supply, past trends, and the impact of potential adjustments on these, the EENA identifies a preferred scenario that balances different sectoral ambitions. On balance, a moderate-high growth scenario is recommended which exceeds baseline forecasts but reflects a reasonable target in the context of what has previously been achieved (**Section 15**).

16.10 The preferred approach combines Scenario 2b for most employment uses, reflecting realistic labour supply growth aligned with past delivery trends, and Scenario 1b for storage and distribution, recognising strong historic performance and future growth potential in that sector. This hybrid approach balances ambition with deliverability and provides a practical basis for aligning employment land provision with Huntingdonshire's economic and demographic trajectory. The preferred scenario therefore results in a recommended target for an additional **922,000m^2 of employment floorspace, or 230 ha over the Plan period**, equivalent to 43,900m^2 per annum, or 11 ha per annum.

Table 16.1 – Total floorspace and land recommended targets over the Plan period in the preferred scenario (rounded)

Employment use	Floorspace target (m^2)	Land target (ha)
Office	113,000	16.8
Research and development	45,900	5.6
Light industrial	106,000	22.1
General industrial	224,000	74.6
Storage and distribution	433,000	110.9
Total	**922,000**	**230**

16.11 This scenario assumes that Huntingdonshire will capitalise on its new infrastructure, attract spillover growth from the Oxford Cambridge Arc, and proactively address its skills and infrastructure constraints, thereby supporting higher growth in sectors such as advanced manufacturing than past trends alone would suggest. The preferred scenario aligns with the expectation that Huntingdonshire will meet its housing growth requirements under the new standard method, ensuring that employment and labour supply grow in tandem. The labour supply derived from the standard method, per the housing need assessment, would comprise the vast majority of the additional employment that would be accommodated in the additional employment space/land targeted over the Local Plan period. Jobs to be accommodated in the storage and distribution space would be somewhat met from spillover demand captured from the wider growth context of the FEMA. This approach supports sustainable and resilient growth. It would imply providing land for business investment, encouraging higher-skilled jobs, and ensuring balanced growth between homes and employment. The preferred scenario will need to be underpinned by supportive policies and regular monitoring, as set out in the recommendations below.

Recommendations

16.12 Building on the evidence and preferred scenario, a set of actionable recommendations is proposed to assist with the development of Huntingdonshire's employment land planning policies. These recommendations are designed in line with Planning Practice Guidance (PPG) requirements and aimed at ensuring that Huntingdonshire achieves sustainable, resilient, and inclusive economic growth. The recommendations have been designed taking into account the ambitions of the Economic Growth Strategy Update, namely:

- Our economy is adaptable. We have planned for change in our key sectors and contribute to national growth priorities.
- Enterprise is celebrated and Huntingdonshire is a great place to do business.
- Our residents have the skills they need to participate in the economy.
- New investment and development is positively supporting our economy.
- Vibrant rural areas and market towns make our district a place to spend time and explore.

Ensure a flexible supply of employment land

16.13 It is important to provide adequate quantity and variety of employment land to meet forecast needs and allow for choice in the market. The EENA has identified a net requirement of approximately 230 ha of additional employment land by 2046 under the preferred scenario (**Section 15**), distributed across office (E(g)(i)), R&D (E(g)(ii)), light industrial (E(g)(iii)), general industrial (B2), and storage and distribution (B8) uses. To meet this need, the Local Plan should **consider allocating new employment sites (or expand existing ones)** such that total supply modestly exceeds the forecast demand. A portion of this additional need is required to account for replacement of losses and a margin for frictional vacancy so that businesses can find space when needed. A diverse portfolio of sites will make the economy more resilient to sector-specific fluctuations. The supply assessment (**Section 10**) forms a starting point for consideration of which sites this approach might include.

16.14 Currently, much of Huntingdonshire's anticipated future employment growth is tied to a few large sites (Alconbury Weald Enterprise Zone) and to existing estates that are near full capacity. This recommendation therefore aims to de-concentrate the risk that more (additional) employment space comes forward. The Council **should continue to safeguard the vast majority of the strategically important Existing Employment Areas** from competing pressures by retaining their allocation for employment use and supporting their intensification where feasible. At the same time, **new allocations could be brought forward in locations aligned with growth trends: near the A1/A14 and A428 corridors,** and where infrastructure improvements (rail or road) create new opportunities. Potential candidates are extensions near St Neots (leveraging A428 and future rail), land around the A1/A14 junction (for logistics and manufacturing) and other major road junctions, and the reuse of large brownfield land for mixed-use including employment. All allocations should consider environmental constraints and sustainable transport access, and the findings of the other evidence base documents which will support the preparation of the emerging Local Plan. It will be important that the portfolio of employment sites comprises a range of sizes and locations to meet the diversity of needs and requirements of businesses.

16.15 The approach should reflect the NPPF mandate to '*be flexible enough to accommodate needs not anticipated in the plan*'.[234] In practice, this means **writing policies that allow a mix of B-class uses on sites and enable plot substitutions if market demands shift (for instance, if there is greater need for R&D labs and less for pure office, or vice versa)[235].** A framework could be adopted which reviews the performance of sites over time appreciating that some underutilised or poor quality sites may not be fulfilling future needs and alternative uses might be more suitable, especially if the employment uses can be replaced by better sites elsewhere. Finally, it is advisable to monitor land take-up annually and have a mechanism (through Local Plan policy or SPDs) to quickly bring additional land into play if demand outpaces expectations, or conversely to review allocations if they remain unfilled.

[234] Ministry of Housing, Communities and Local Government, 2024. National Planning Policy Framework.

[235] For example, additional sites could be protected under the proviso that employment space of a certain type is brought forward, with flexibility built in such that alternative uses could be allowed should evidence be satisfactorily presented in proof of this.

Upgrade, intensify and 'green' the existing employment stock

16.16 The modernisation and intensification of Established Employment Areas to meet future needs and sustainability goals is encouraged. Much of Huntingdonshire's current employment floorspace was built decades ago and, as noted earlier, a large share may not meet future energy efficiency standards (**Section 0**). By **facilitating redevelopment and refurbishment, the Council can help both encourage the delivery of modern premises that businesses need (such as flexible hybrid offices, tech labs, and clean workshops) and improve the environmental performance of buildings to contribute to net zero targets**. This could take the form of policy wording which presumes in favour of redevelopment or intensification on sites which are identified as suitable for such activities. Intensification means more jobs can be accommodated on the same land area, reducing the pressure to find extensive new greenfield land.

16.17 Greening the stock not only cuts carbon emissions but also makes the local economy more resilient (as companies increasingly prefer energy efficient buildings to cut operating costs). This recommendation aligns with national policy encouraging the re-use of previously developed land and the upgrading of building stock for a modern economy. The Council should consider creating a positive framework for these areas to evolve. For example, if a landowner proposes to replace an old single-storey industrial building with a new multi-story business centre (perhaps mixing light industrial on ground floor and offices or studios above), **policies should support that in principle, provided issues like access and design are addressed.**

16.18 Additionally, **churn of outdated stock should be facilitated**: where old buildings cannot be feasibly retrofitted to meet higher standards, redevelopment should be enabled. The Council may work with landlords on mapping which properties are likely to fail MEES regulations by 2027/2030, especially older offices in town centres and older factory units, and then target those for intervention. In some cases, lightly-used employment sites on the fringes of towns might even be partially recycled to other uses if better employment land is made available elsewhere. Overall, the emphasis should be on renewal not loss and encouraging owners to refurbish or rebuild for the next generation of businesses.

16.19 To support this, HDC could consider establishing a Property Improvement Grant or Loan scheme (potentially using UK Shared Prosperity Fund resources) to assist small industrial landlords in upgrading premises (for instance, a matching grant for solar roof installation or improved insulation in exchange for keeping rents affordable for local firms). Furthermore, planning policy could introduce an intensification policy for existing employment sites if there is a view that intensification is a reasonable prospect (**Appendix C** identifies some opportunities for intensification). If a proposal increases the job density or floorspace on an allocated employment site, it could be afforded some leniency on use or design, recognising the public benefit of more efficient land use. The supply assessment forms an initial step in establishing which existing sites may be able to accommodate redevelopment or intensification. These are typically those sites which are large in scale (making intensification viable) and ageing; more rural sites which have low quality stock may also benefit from redevelopment if this does not result in displacement of existing occupiers however intensified use is likely unsuitable in these locations.

16.20 The EENA's findings on energy performance, although not unique to Huntingdonshire, are compelling. A recommended action is to develop an Energy Efficiency Improvement Plan for allocated employment sites once determined, that would possibly map out hotspots of likely non-compliance such as clusters of older workshops or offices. This plan could prioritise areas for interventions like retrofitting programs, and ensure local businesses are aware of the looming regulations and available support. Some councils have included in Local Plans that major commercial developments include on-site renewable energy generation and EV charging, and these could be considered, especially on possible new allocations that afford the opportunity to pursue high sustainability credentials from the start.

Support key clusters and innovation-led growth

16.21 Targeted support for high-value industry clusters will drive sustainable economic growth and embed Huntingdonshire in the wider innovation ecosystem. Given its position in the Ox-Cam Arc, the district is well-placed to host growth in sectors like advanced manufacturing, life sciences, digital tech, clean energy, and agri-tech (**Section 9**). These sectors offer higher productivity and wages, and can create an innovation spillover effect benefitting local supply chains and communities. Creating the conditions where firms in these industries can start, grow, and collaborate could be a worthwhile consideration for HDC.

16.22 Several local assets could be leveraged for cluster development. Alconbury Weald (Enterprise Zone) if successful in bringing forward new employment space, could become a flagship for innovation-led employment (e.g. advanced manufacturing, R&D, autonomous vehicles, low-carbon technologies). The current progress of delivery of Alconbury EZ for employment use should be seen as a project-specific outcome rather than a reflection of the underlying employment land need. Similar strategic scale proposals may also be able to achieve the ambitions that Alconbury has not fully delivered in that regard, supported by an accelerated level of growth in the FEMA which reflects a step change in labour demand/supply. As discussed previously, large sites are necessary to meet the needs of the logistics sector, but would necessarily form part of a portfolio of sites of varied scales and locations.

16.23 Another priority is to partner with Cambridge's science and tech network to encourage spillover: for instance, promoting Huntingdonshire sites as a lower-cost expansion option for companies graduating from Cambridge's incubators or for labs needing larger footprints. Huntingdonshire can position itself as a complementary location, especially for firms in emerging sectors that need affordable space and good connectivity. **Specific initiatives could include supporting the proposed St Ives Innovation Quarter in the town centre (with co-working and small lab/office spaces to attract tech start-ups).**

16.24 Moreover, synergies between clusters should be supported, for example agri-tech intersects with both advanced manufacturing (equipment, robotics) and life sciences (bioscience for crops), so **planning decision-making which is favourable to proposals that include co-location of businesses in key sectors** could be a beneficial approach.

16.25 Regional policy support[236,237] for the development of clusters in the region could be mirrored at the local level whereby the new Local Plan could include a **policy supporting innovation clusters offering streamlined planning for R&D facilities or campus-style developments in designated areas.** Additionally, ensuring that employment land allocations include some plots tailored for cluster needs is important. This might mean reserving land for a science park-style development (with smaller parcels, high-spec utilities, and green space to attract office/R&D users) rather than using all available land for general warehouses. A local example of best practice is the Cambridge Science Park model, where targeted marketing created a world-class cluster. Huntingdonshire is smaller, but the same principles apply. Focus on strengths of land availability, location, and proximity to Cambridge and Peterborough and support development where demand exists.

[236] UK Government, 2024. Invest 2035: The UK's Modern Industrial Strategy.

[237] Cambridgeshire and Peterborough Combined Authority, 2022. Cambridgeshire and Peterborough Economic Growth Strategy.

Plan for strategic logistics growth (and mitigate impacts)

16.26 The logistics and distribution sector as a key driver of jobs and investment should continue to be supported in a planned, sustainable manner that mitigates negative impacts. PPG notes the importance of logistics and that this will likely continue to be the case. By identifying suitable sites for logistics, the Council could both capture the economic benefits whilst also ensuring that these space-intensive uses do not undermine other goals such as preserving land for higher value-added uses or avoiding undue environmental harm.

16.27 Market signals and evidence presented by landowners, agents and site promoters suggests strong demand for logistics parks and warehouses along the A14/A1 corridor. However, there remains some concern that logistics sprawl could consume large swathes of land for relatively low employment density. **A strategic approach is recommended: to concentrate new strategic-scale logistics sites in a few optimal nodes.**

16.28 By contrast, within or adjacent to smaller towns and villages, logistics growth should be more limited and focused on smaller 'last-mile' depots or local storage rather than the very largest warehouses. The Local Plan should identify and **allocate at least one additional strategic scale logistics site,** ensuring that it has good access to the SRN. Additionally, existing industrial estates with vacant or underutilised land could be earmarked for small- to mid-scale logistics units, to support local distribution and service delivery.

16.29 Importantly, any new logistics development must include robust mitigation measures: strict HGV routing plans to keep HGVs on the SRN, on-site measures for carbon reduction, and high design standards to mitigate visual impact and maximise community benefits.

16.30 Many fast-growing districts have faced the logistics boom and responded with policy guidance. For instance, Central Bedfordshire's draft Local Plan proposes a policy that large logistics proposals must be located in areas with characteristics deemed suitable by the local authority e.g. relating to accessibility and environment. Such policy wording could be appropriate in Huntingdonshire. Huntingdonshire could also co-ordinate with neighbouring authorities through the FEMA context: the golden logistics triangle of the Midlands is now considered to extend into this region, and decisions in Huntingdonshire will have cumulative effects beyond its boundary.

16.31 In line with national guidance, the Local Plan could treat logistics as a distinct segment, potentially through a dedicated policy that sets expectations for warehouse development (locations, design, sustainability). To support sustainable growth, innovation in logistics should be welcomed. For example, trialling consolidation centres near towns, and working with developers on job quality and commitments to skills. By planning positively for logistics, Huntingdonshire could capture its share of this essential sector while safeguarding the environment and community interests.

Regular monitoring and adaptive review of economic needs

16.32 Given the uncertainties in economic forecasting and the potential for rapid change, it is **essential to monitor outcomes and periodically review the evidence base**. The EENA provides a robust assessment, but the Council should not treat it as static. By establishing a clear review cycle, for instance, a five-year review of the EENA or a mid-term Local Plan review focused on employment, HDC would be able to adjust its policies and land allocations in a timely response to what is occurring at the time. This adaptive approach ensures that the Plan remains effective and aligned with both local aspirations and external conditions (such as the performance of key sectors, or progress on infrastructure delivery). It also ties into

Planning Practice Guidance on plan-making, which advises local authorities to take into account significant economic changes or new priorities and update plans as necessary.

16.33 For Huntingdonshire, a reasonable timeline would be to update the EENA every five years. In the interim, HDC's planning and economic development teams should track a set of key indicators annually: employment land take-up (hectares developed each year by type), vacancy rates in commercial property, rental values, number of jobs created, unemployment rate, and progress on major projects. This will help identify if the preferred scenario is on track or if adjustments are needed. For example, if by 2030 it is clear that job growth is far exceeding projections, the Council may need to safeguard additional land. Conversely, if some allocated sites remain undeveloped with little market interest, it may signal a need to repurpose them or investigate barriers. A monitoring report can be published regularly to keep stakeholders informed of how the economy is progressing relative to the plan.

16.34 Huntingdonshire sits in a wider FEMA, and economic and political changes across the region could significantly influence employment needs over the Plan period. The trajectory of local government reorganisation will likely mean it would be sensible to update/amalgamate the respective employment needs assessments which have currently been prepared separately, taking into account the demand and supply conditions for the CPCA area as a whole.

16.35 In terms of formal mechanisms, some councils have included a clause in their Local Plan that triggers a partial review if certain conditions are met. Huntingdonshire could incorporate a similar commitment. This provides more assurance that planning policy remains dynamic to change. Finally, as part of monitoring, HDC could also track the implementation of these recommendations and which have been actioned.

Boost the rural economy through diversification and access

16.36 It will be important to ensure that rural areas and smaller settlements in Huntingdonshire are not left behind by focusing on rural economic development measures. Rural parts of the district face unique challenges such as smaller customer bases, infrastructure limitations, and limited local job opportunities. However, they also present opportunities such as farm diversification, tourism, and a high quality of life that can attract entrepreneurs and remote workers. By supporting diversification and improving access, HDC can help rural communities become more economically self-sufficient and resilient.

16.37 Huntingdonshire's rural economy already shows signs of adaptation as many farms have branched into letting out buildings or holiday accommodations, and home-based businesses are common. HDC should facilitate farm diversification and rural enterprise. This could mean, for example, **continuing to allow the conversion of redundant agricultural buildings into small workshops, offices**, or tourist facilities (with appropriate scale limits) (**Section 0**). The EENA notes a lack of suitable small workspaces for businesses that start at home and then need to scale up and addressing this could involve encouraging the development of small business units in or near villages.

17. Appendix A: Map of sites

Figure 17.1 – Overview map of employment sites

Figure 17.2 – Overview map of employment sites (extent 1)

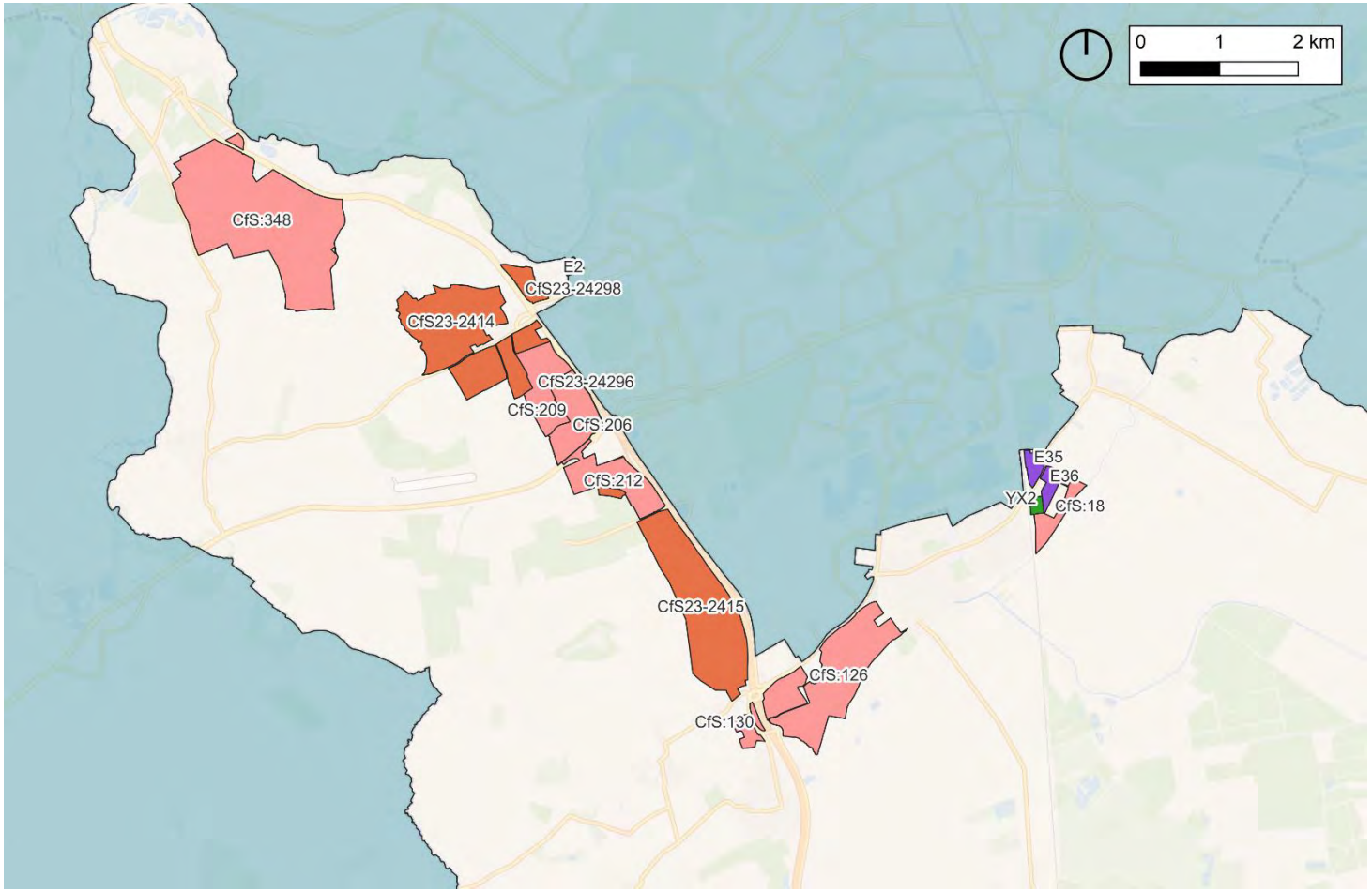


Figure 17.3 – Overview map of employment sites (extent 2)

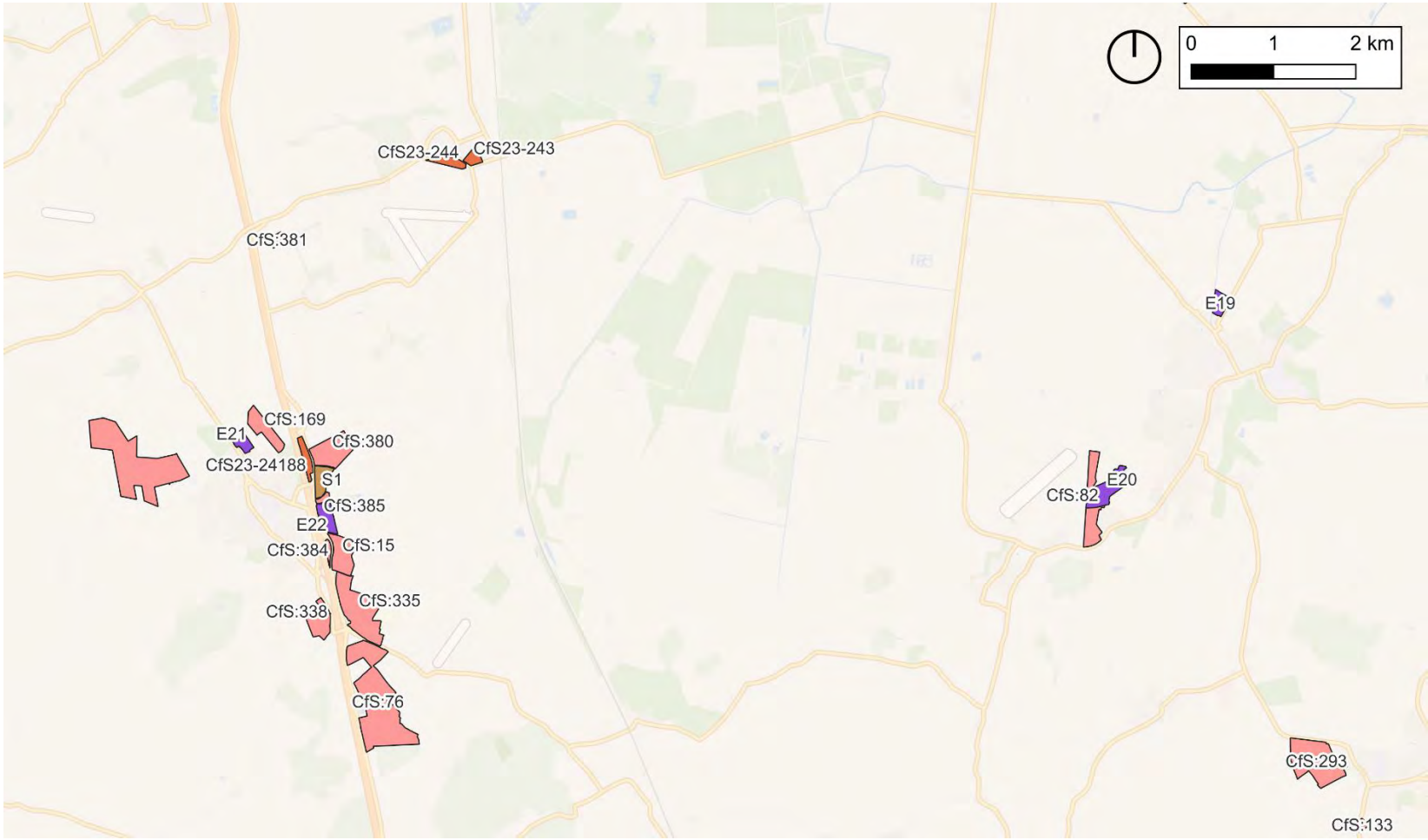


Figure 17.4 – Overview map of employment sites (extent 3)

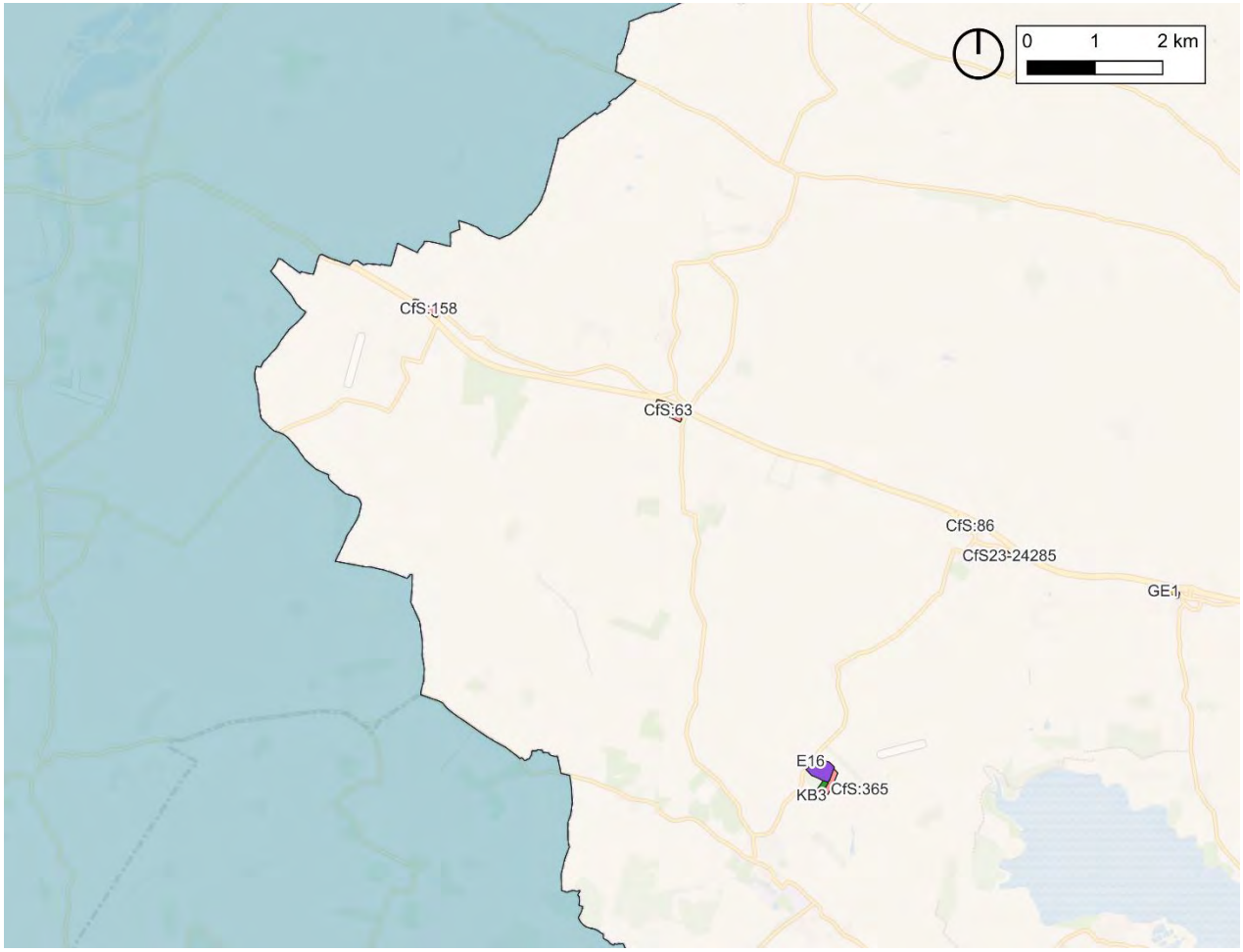


Figure 17.5 – Overview of employment sites (extent 4)

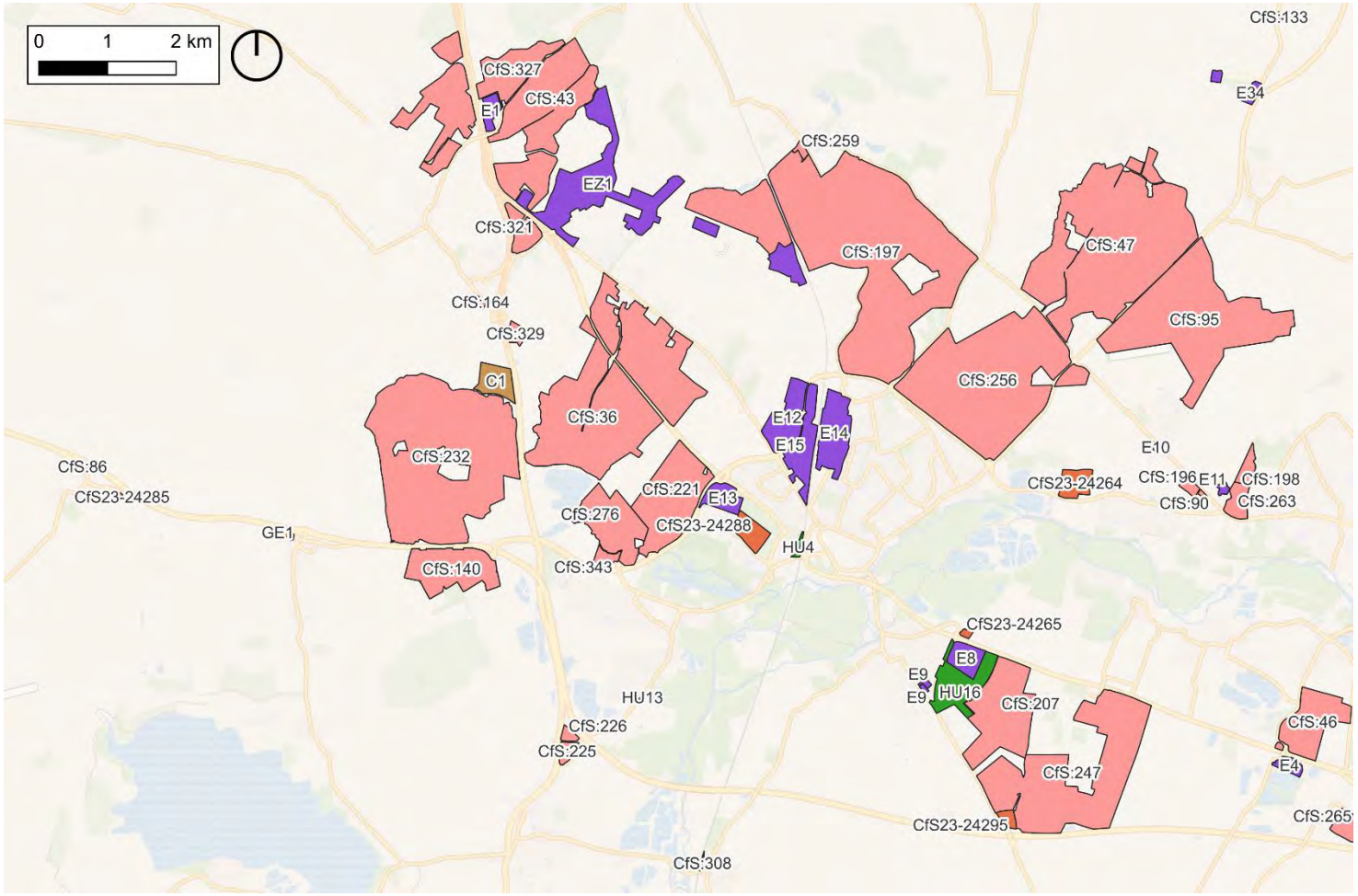


Figure 17.6 - Overview of employment sites (extent 5)

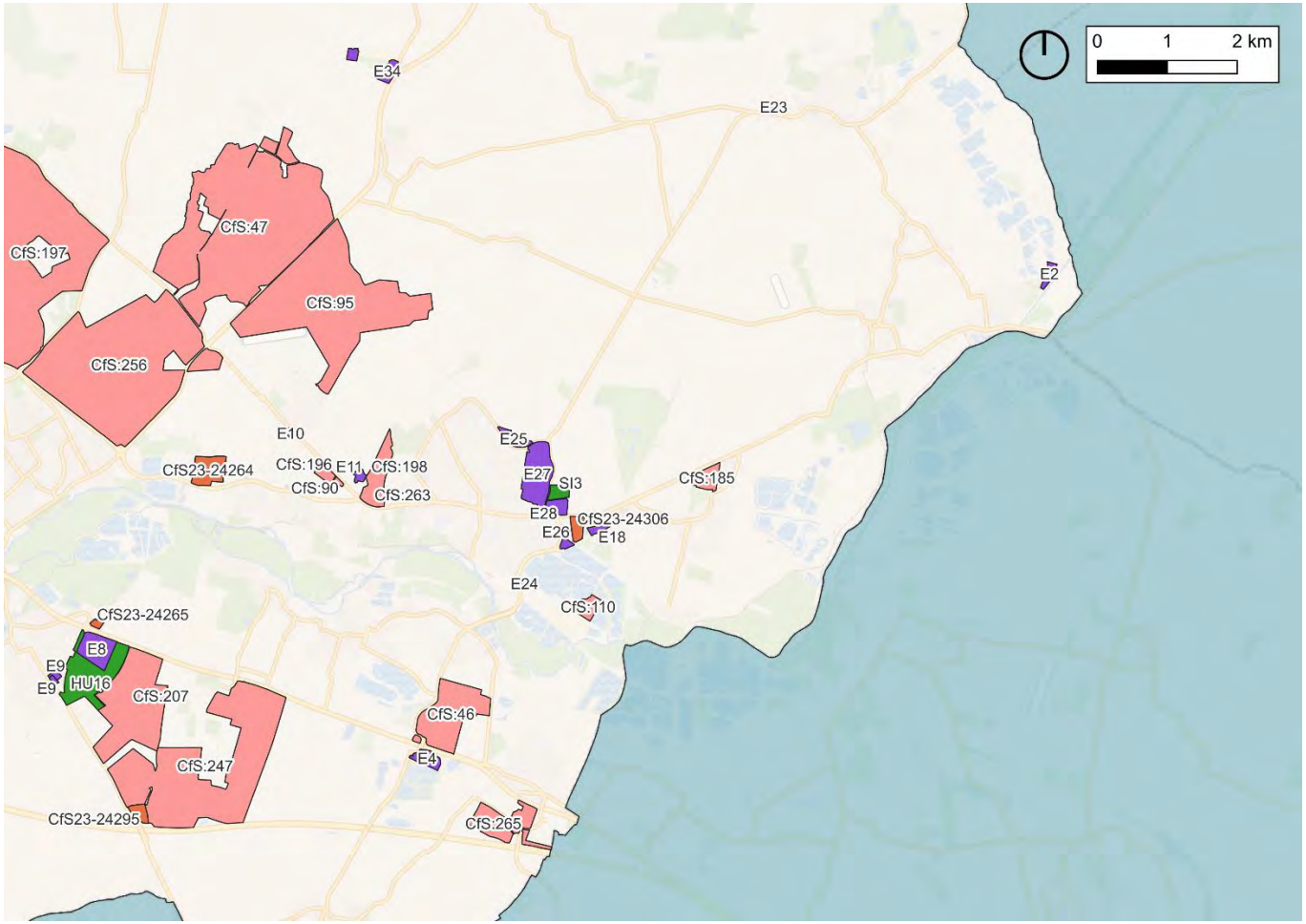
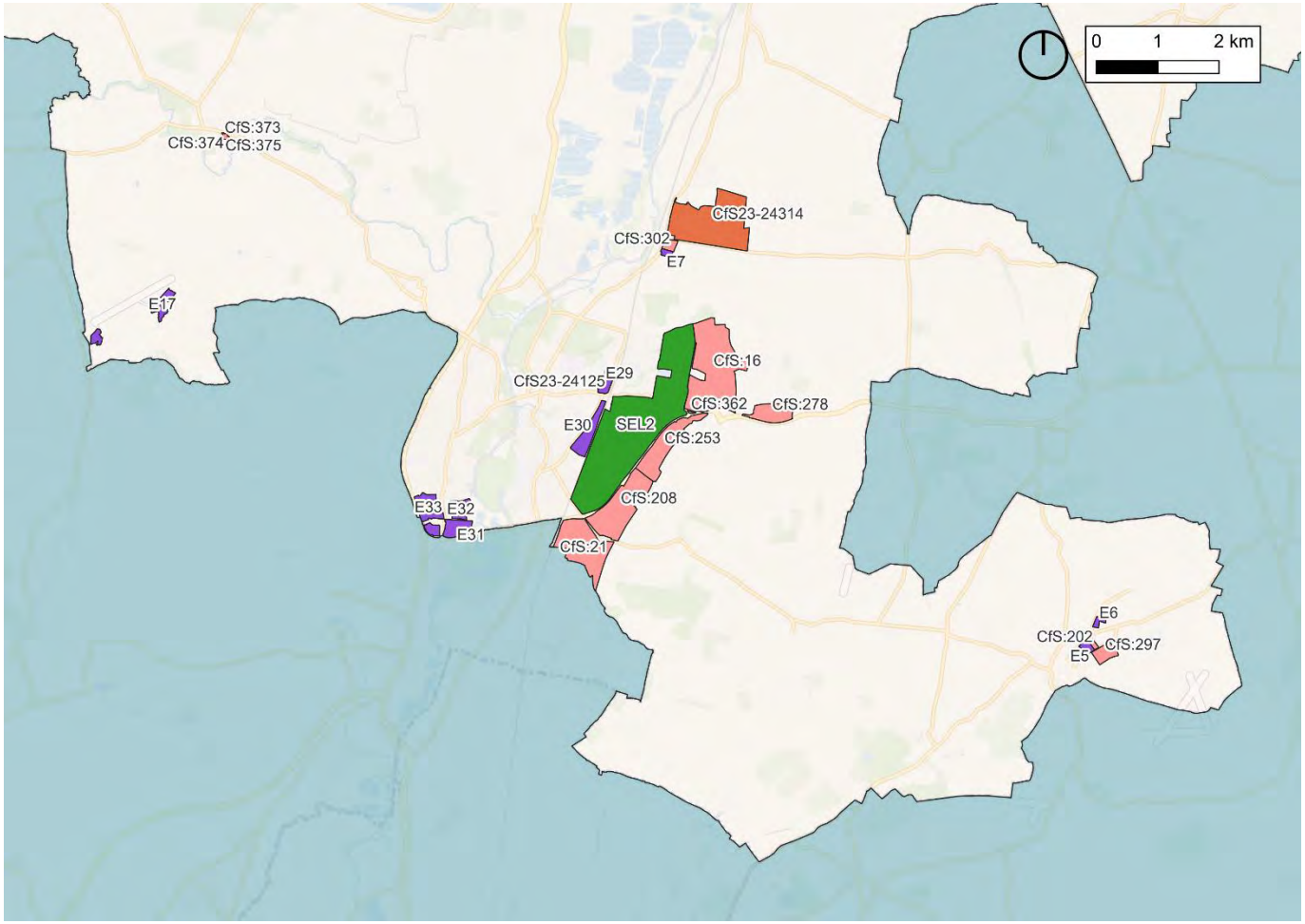


Figure 17.7 – Overview of employment sites (extent 6)



18. Appendix B: Site assessment approach

18.1 **Appendix B** has been published in a supplementary document.

19. Appendix C: Established Employment Area portfolio

19.1 **Appendix C** has been published in a supplementary document.

20. Appendix D: Suppressed demand

20.1 The concept of suppressed demand refers to the latent or unfulfilled need for certain types of employment space (usually industrial, and storage and distribution) due to supply constraints. In a condition of demand exceeding supply, rents would be expected to rise whilst vacancy and net absorption remain (artificially) low. In such markets, existing premises are fully utilised or absorbed as soon as they become available, leaving no slack for businesses to expand or new entrants to secure space. Persistent low vacancy rates thus indicate an imbalance where demand continuously outstrips supply, restricting employment creation and broader economic growth.

20.2 The concept has garnered increasing attention based on the view that forecasting methods dealing with employment land need may not be able to fully capture the effect of trends such as increasing prominence of e-commerce, reshoring of manufacturing, and increased freight volumes. Following this rationale, Savills have developed a 'suppressed demand model' which attempts to top-up the level of demand by appreciating the amount of demand that would have hypothetically materialised if a 'sufficient' supply of commercial property had been available over a certain historical period.

20.3 The Savills modelling approach is centred on the 8.0% market equilibrium availability rate. This is a prominent benchmark utilised across policy and needs assessments.[238,239] Sometimes the market equilibrium rate is assumed to be 5.0%, or somewhere in the range between 5.0% to 8.0%. Broadly, the process is then to calculate the floorspace that would have been needed in each year to maintain the market equilibrium. The ratio between net absorption and available floorspace is then considered to account for the scale of demand which was being met by delivery of additional floorspace. The average annualised suppressed demand over a given period is used to top-up the historic trend in unmet demand, and projected forward over the desired study period.

20.4 Many of the site promoters, primarily of strategic scale future development sites, in their evidence and/or responses to consultation conducted by HDC have advocated the use of (some variation) of the suppressed demand model to determine the need for employment space in Huntingdonshire. **Table** 20.1 provides a summary of the need figures provided in the respective assessments.

Table 20.1 – Evidence presented on suppressed demand in Huntingdonshire finds a range of need for industrial space

Promoter	Iceni Projects on behalf of Newlands Developments	Quod in relation to Norman Cross	Savills in relation to Brampton Cross
Geographical scale	Huntingdonshire – derived from consideration of proportion of strategic scale (100,000ft^2+)	Huntingdonshire	Huntingdonshire

[238] British Property Federation, 2022. Levelling Up – The Logic of Logistics.

[239] Greater London Authority, 2012. Land for Industry and Transport.

	stock across Huntingdonshire and Peterborough area (once Peterborough Gateway discounted)		
Employment use	Industrial (class B2/B8)	Industrial (class B2/B8)	Industrial (class B2/B8)
Projected need period	2024 – 2046	2024 – 2036	2022 – 2042
Projected need	723,000 – 1,021,000m^2 [residual need after supply 666,000 – 964,000m^2] Concludes a current shortfall of 666,000m^2	All industrial: deficit after pipeline = 929,000m^2 Logistics units of 100,000ft^2+, 4*: 770,000m^2	Based on net absorption, over 100,000ft^2: 1,700,000m^2 Based on suppressed demand: 300,000m^2 Total: 2,000,000m^2
Projected need (p.a.)	32,900 – 46,400m^2	77,000 / 64,000m^2	99,000m^2
Key assumptions	Focusing on strategic scale units across industrial uses	Accounting for pipeline	Driven by net absorption more than suppressed demand

20.5 The variation in the calculated suppressed demand and therefore adjusted need is demonstrably highly variable depending on the assumptions and approach taken. The model is highly sensitive to the inputs used, in terms of at least the: geographical area over which trends have been considered, how use classes have been (dis)aggregated, the premises size bands used, and the time periods assessed.

20.6 Whilst the principles that underpin the concept of suppressed demand are generally agreed across parties (including by Volterra), our view is that the approach is not sufficiently refined to base the modelling of scenarios required for the purposes of this evidence base document for Huntingdonshire's Local Plan review. The preferred scenario recommended within the EENA nonetheless produces a need for storage and distribution space which falls within the range of figures presented in evidence that utilises (a variation of) the suppressed demand model. This provides assurance that the preferred scenario is appropriate.

21. Appendix E: Supply/demand balance calculation

21.1 Note: Scenarios do not include pipeline/unimplemented planning permissions from 2024 onwards.

Scenario 1a – Labour demand

Table 21.1 – The labour demand scenario (1a) produces a net requirement for 286,000m² / 57.1 ha for employment use over the study period

Supply/demand balance for the labour demand scenario (1a)

Modelling step	Office	Research and development	Light industrial	General industrial	Storage and distribution	Total
A. Supply of occupied floorspace	259,042	333,083	125,283	353,891	717,944	
B. Current vacant floorspace	11,948	0	288	8,157	56,529	
C. Total stock of floorspace [A+B]	270,990	333,083	125,571	362,048	774,472	
Gross floorspace demand	36,840	4,198	-8,110	-59,209	68,117	
D. Gross floorspace demand + replacement	67,541	16,532	24,784	-12,920	106,650	
E. Optimum frictional vacancy [8% of A+D]	26,127	27,969	12,005	27,278	65,967	
F. Surplus/ deficit of vacant floorspace [E-B]	14,179	27,969	11,718	19,121	9,439	
G. Gross requirement for	352,710	377,584	162,072	368,248	890,561	

Modelling step	Office	Research and development	Light industrial	General industrial	Storage and distribution	Total
floorspace [C+D+F]						
H. Net requirement for floorspace [G-C]	81,720	44,501	36,502	6,201	116,089	285,630
Land	12.2	5.4	7.6	2.1	29.8	57.1

Scenario 1b – Labour demand (aspirational)

Table 21.2 – The labour demand scenario (aspirational) (1b) produces a net requirement for 842,000m^2 / 209 ha for employment use over the study period

Supply/demand balance for the labour demand scenario (aspirational) (1b)

Modelling step	Office	Research and development	Light industrial	General industrial	Storage and distribution	Total
A. Supply of occupied floorspace	259,042	333,083	125,283	353,891	717,944	
B. Current vacant floorspace	11,948	0	288	8,157	56,529	
C. Total stock of floorspace [A+B]	270,990	333,083	125,571	362,048	774,472	
Gross floorspace demand	48,673	4,760	46,193	96,279	361,279	
D. Gross floorspace demand + replacement	79,374	17,095	79,087	142,568	399,812	
E. Optimum frictional vacancy [8% of A+D]	27,073	28,014	16,350	39,717	89,420	
F. Surplus/ deficit of vacant	15,125	28,014	16,062	31,560	32,892	

Modelling step	Office	Research and development	Light industrial	General industrial	Storage and distribution	Total
floorspace [E-B]						
G. Gross requirement for floorspace [C+D+F]	365,490	378,192	220,720	536,175	1,207,176	
H. Net requirement for floorspace [G-C]	94,499	45,109	95,149	174,128	432,703	841,589
Land	14.1	5.5	19.8	58.0	110.9	209

Scenario 2a – Labour supply scenario

Table 21.3 – The labour supply scenario (2a) produces a net requirement for 502,000m² / 106 ha for employment use over the study period

Supply/demand balance for the labour supply scenario (2a)

Modelling step	Office	Research and development	Light industrial	General industrial	Storage and distribution	Total
A. Supply of occupied floorspace	259,042	333,083	125,283	353,891	717,944	
B. Current vacant floorspace	11,948	0	288	8,157	56,529	
C. Total stock of floorspace [A+B]	270,990	333,083	125,571	362,048	774,472	
Gross floorspace demand	90,267	10,547	14,593	-42,042	169,593	
D. Gross floorspace demand + replacement	120,969	22,882	47,488	4,247	208,126	
E. Optimum frictional	30,401	28,477	13,822	28,651	74,086	

Modelling step	Office	Research and development	Light industrial	General industrial	Storage and distribution	Total
vacancy [8% of A+D]						
F. Surplus/ deficit of vacant floorspace [E-B]	18,453	28,477	13,534	20,494	17,557	
G. Gross requirement for floorspace [C+D+F]	410,412	384,442	186,593	386,789	1,000,155	
H. Net requirement for floorspace [G-C]	139,422	51,359	61,022	24,741	225,683	502,226
Land	20.8	6.3	12.7	8.2	57.9	106

Scenario 2b – Labour supply (apportionment by current residence-based employment)

Table 21.4 – The labour supply (apportionment by current residence-based employment) (2b) produces a net requirement for 675,000m^2 / 167 ha for employment use over the study period

Supply/demand balance for the labour supply (apportionment by current residence-based employment) scenario (2b)

Modelling step	Office	Research and development	Light industrial	General industrial	Storage and distribution	Total
A. Supply of occupied floorspace	259,042	333,083	125,283	353,891	717,944	
B. Current vacant floorspace	11,948	0	288	8,157	56,529	
C. Total stock of floorspace [A+B]	270,990	333,083	125,571	362,048	774,472	

Modelling step	Office	Research and development	Light industrial	General industrial	Storage and distribution	Total
Gross floorspace demand	65,361	5,449	56,525	142,205	133,462	
D. Gross floorspace demand + replacement	96,062	17,784	89,419	188,494	171,995	
E. Optimum frictional vacancy [8% of A+D]	28,408	28,069	17,176	43,391	71,195	
F. Surplus/ deficit of vacant floorspace [E-B]	16,460	28,069	16,889	35,234	14,666	
G. Gross requirement for floorspace [C+D+F]	383,513	378,936	231,878	585,776	961,134	
H. Net requirement for floorspace [G-C]	112,523	45,853	106,308	223,728	186,662	675,073
Land	16.8	5.6	22.1	74.6	47.9	167

Scenario 2c – Labour supply (apportionment by future residence-based employment)

Table 21.5 – The labour supply (apportionment by future residence-based employment) (2c) produces a net requirement for 659,000m^2 / 161 ha for employment use over the study period

Supply/demand balance for the labour supply (apportionment by future residence-based employment) scenario (2c)

Modelling step	Office	Research and development	Light industrial	General industrial	Storage and distribution	Total
A. Supply of occupied floorspace	259,042	333,083	125,283	353,891	717,944	

Modelling step	Office	Research and development	Light industrial	General industrial	Storage and distribution	Total
B. Current vacant floorspace	11,948	0	288	8,157	56,529	
C. Total stock of floorspace [A+B]	270,990	333,083	125,571	362,048	774,472	
Gross floorspace demand	63,683	2,643	45,608	108,390	168,212	
D. Gross floorspace demand + replacement	94,384	14,978	78,502	154,680	206,745	
E. Optimum frictional vacancy [8% of A+D]	28,274	27,845	16,303	40,686	73,975	
F. Surplus/ deficit of vacant floorspace [E-B]	16,326	27,845	16,015	32,529	17,446	
G. Gross requirement for floorspace [C+D+F]	381,701	375,906	220,088	549,256	998,664	
H. Net requirement for floorspace [G-C]	110,710	42,823	94,517	187,208	224,192	659,450
Land	16.5	5.2	19.7	62.4	57.5	161

Scenario 3a – Past take-up scenario

Table 21.6 – The past take-up scenario (3a) produces a requirement for 460,000m² / 120 ha for employment use over the study period

Supply/demand balance for the past take-up scenario (3a)

Modelling step	Office	Research and development	Light industrial	General industrial	Storage and distribution	Total
A. Supply of occupied floorspace	259,042	333,083	125,283	353,891	717,944	
B. Current vacant floorspace	11,948	0	288	8,157	56,529	
C. Total stock of floorspace [A+B]	270,990	333,083	125,571	362,048	774,472	
Gross floorspace demand	27,093	2,455	9,690	108,986	216,065	
D. Gross floorspace demand + replacement	27,093	2,455	9,690	108,986	216,065	
E. Optimum frictional vacancy [8% of A+D]	22,891	26,843	10,798	37,030	74,721	
F. Surplus/ deficit of vacant floorspace [E-B]	10,943	26,843	10,510	28,873	18,192	
G. Gross requirement for floorspace [C+D+F]	309,026	362,381	145,771	499,907	1,008,729	
H. Net requirement for floorspace [G-C]	38,035	29,298	20,201	137,859	234,257	459,651

Modelling step	Office	Research and development	Light industrial	General industrial	Storage and distribution	Total
Land	5.7	3.6	4.2	46.0	60.1	120

Contact Us

volterra.co.uk

info@volterra.co.uk
020 4529 1736

Chester House
1-3 Brixton Road
London
SW9 6DE