



BATH & NORTH EAST SOMERSET – EMPLOYMENT SITES ASSESSMENT

Notice

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1. Introduction

This assessment provides a strategic appraisal of 58 potential development sites across Bath & North East Somerset (B&NES), undertaken to support the preparation of the emerging Local Plan. The Local Planning Authority supplied these sites to AtkinsRéalis for independent evaluation to understand their relative capacity to accommodate future employment or mixed-use development in line with the spatial, economic and environmental objectives set up in the emerging Local Plan. This assessment is intended to build a robust evidence base that will help inform the Council's approach to planning policies and site allocations relating to employment land in the Regulation 19 version of the Local Plan.

This work draws on and updates previous technical studies commissioned by B&NES Council, including earlier versions of the Future Economic Needs Assessment (FENA), previous site-based assessments undertaken by Hardisty Jones Associates, and the Regulation 18 Housing Economic Land Availability Assessment (HELAA) methodology. To ensure continuity with the existing evidence base, key assessment criteria have been retained and refined to be fully applicable to prospective new development sites. These criteria encompass a broad range of planning considerations, including: placemaking and development quality; transport accessibility across all modes; proximity to local services; the functional relationship with nearby settlements; commercial market performance; utilities and digital connectivity; and environmental and heritage sensitivities.

The aim of this assessment is not to provide definitive statements of development potential, but rather to identify the relative strengths, weaknesses and barriers associated with each site. The appraisals are supported by additional work to provide floorspace calculations. These calculations provide a maximum capacity for each site, but the work adopts a common methodology based on plot ratios and employment typologies rather than providing site specific assessments that draw on, for example, transport modelling, viability testing and concept design development, which will be undertaken by the council to feed into the Draft Local Plan proposed site allocations. Instead, the findings offer an informed strategic view of how each site performs against policy relevant criteria and how they could contribute to meeting the district's employment and mixed-use needs.

Each site has been assessed using a standardised scoring approach to ensure transparency and comparability across locations of differing character, size and context. The scoring system uses a five-point traffic light scale to indicate relative performance, with higher scores representing stronger suitability or fewer constraints. Detailed definitions for each score, together with the full assessment pro forma, are provided in Appendix A and should be referred to when interpreting results presented later in the document.

The report is structured as follows:

Chapter 2: Document review – covering the national, sub-regional and local policies and strategies that establish a framework for steering economic growth across Bath & North-East Somerset.

Chapter 3: Methodology – providing an overview of the sites and the assessment process that has informed recommendations around the relative strengths of individual sites for employment use and the floorspace that they might provide in different development scenarios. A summary is provided of key themes that emerged through market engagement with agents.

Chapter 4: Site analysis – a summary of the assessment outputs for existing allocations and employment sites, ‘new’ employment sites and recommendations around ensuring sufficiency of supply.

Chapter 5: Supply / Demand analysis – an overview of the supply conclusions across employment typologies, existing/proposed allocations and broad locations, alongside a summary of the key elements of employment need set out in the council’s wider evidence base.

Chapter 6: Conclusion – draws together the principal findings of the sites assessment, the insights gathered and the way in which the findings should inform the council’s site selection and allocations.

2. Document Review

This section provides a strategic review of the planning and economic development policy context of relevance to this assessment. The purpose of the review is to highlight the key strategic policy drivers that need to be considered in the assessment of employment land in Bath and North-East Somerset. The review includes an assessment of significant national, regional and local policies.

2.1. National Policy

National Planning Policy Framework (December 2024)

The revised National Planning Policy Framework (NPPF)¹, published on 12 December 2024, sets out government's planning policies for England and how these are expected to be applied.

Paragraph 20 of the revised NPPF states that strategic policies should set out an overall strategy for the pattern, scale and design quality of places and make sufficient provision for employment land.

Paragraph 85 outlines that planning policies and decisions should help create the conditions to support economic growth, with a focus on allowing areas to build on their strengths, particularly important where Britain can be a global leader in innovation and productivity.

Paragraph 86 indicates that planning policies should:

- a) *set out a clear economic vision and strategy which positively and proactively encourages sustainable economic growth, having regard to the national industrial strategy and any relevant Local Industrial Strategies and other local policies for economic development and regeneration;*
- b) *set criteria, and identify strategic sites, for local and inward investment to match the strategy and to meet anticipated needs over the plan period;*
- c) *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;*
- d) *seek to address potential barriers to investment, such as inadequate infrastructure, services or housing, or a poor environment; and*

¹ [National Planning Policy Framework \(2024\), Ministry of Housing, Communities & Local Government](#)

- e) *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 87 also states planning policies and decisions should recognise and address the specific locational requirements of different sectors. This includes making provision for:

- a) *clusters or networks of knowledge and data-driven, creative or high technology industries; and for new, expanded or upgraded facilities and infrastructure that are needed to support the growth of these industries (including data centres and grid connections);*
- b) *storage and distribution operations at a variety of scales and in suitably accessible locations that allow for the efficient and reliable handling of goods, especially where this is needed to support the supply chain, transport innovation and decarbonisation; and*
- c) *the expansion or modernisation of other industries of local, regional or national importance to support economic growth and resilience.*

National Planning Policy Framework (August 2026)

The National Planning Policy Framework² was published 17 August 2026, this version of the NPPF has not just been a revision of paragraph numbers but an overhaul of the NPPF in its entirety. The NPPF sets out Plan-making and national decision-making policies across England.

Within the plan-making framework PM2: Local Plans, sets out that they should be positively prepared setting out a spatial strategy and specific proposals for accommodating development needs. This includes;

- a. *Setting out a vision for the plan area, supported by no more than ten measurable outcomes, which:*
 - i. *Articulates how the area should change over the plan period;*
 - ii. *Sets aspirational aims and objectives underpinned by a realistic appreciation of what the plan's policies can genuinely shape and deliver;*
 - iii. *Reflects longer term expectations extending beyond the plan period where appropriate, including for any broad locations for growth and regeneration identified in the spatial development strategy, and any specific strategic site proposals; and*
 - iv. *Has particular regard to meeting the identified development needs of the area in a sustainable manner in accordance with policy S1.*
- b. *Setting out a spatial strategy, policies for the minimum amount of development to be provided, land allocations⁸ and broad locations for growth,*

² [National Planning Policy Framework.pdf](#)

and designations in accordance with policy S2, for a period of no less than 10 years from the point of adoption of the plan. Local plans can cover a longer time period where this would, for example, help support the delivery of longer-term infrastructure or strategic development;

c. Identifying the contributions expected from development towards meeting affordable housing requirements and on-and off-site infrastructure necessary to support delivery of the plan in accordance with policy PM12; and

d. Including other policies, accompanied by concise explanatory text as necessary to aid interpretation, only where these support the delivery of specific allocated sites (to set clear expectations of what is required in terms of layout, infrastructure and design); or where these address particular local issues in accordance with policy PM6.

The UK's Modern Industrial Strategy (November 2025)

The UK's Modern Industrial Strategy³ outlines a plan to increase business investment and grow 'industries of the future' in the UK and covers a 10-year period to 2035.

The Strategy identifies eight priority sectors (IS-8): Advanced Manufacturing, Clean Energy Industries, Creative Industries, Defence, Digital & Technologies, Financial Services, Life Sciences, Professional and Business Services.

There is also a focus on raising productivity of city regions, including the West of England, as well as forming clusters of IS-8 sectors, which it states is critical for competitiveness.

2.2. Sub-Regional Policy and Strategy

West of England Local Industrial Strategy (July 2019)

The West of England Local Industrial Strategy⁴ published in July 2019 sets out a plan to enhance productivity and drive economic growth in the West of England. The Strategy outlines four key priorities:

- Cross-sectoral innovation
- Inclusive growth
- Productivity challenge
- Innovation in infrastructure delivery

Of particular relevance to this Employment Land Review (ELR), the Strategy emphasises the West of England's position as a 'globally significant innovation ecosystem' and seeks to strengthen this by fostering collaboration between advanced engineering, creative & digital industries, and financial & business technology

³ [The UK's Modern Industrial Strategy \(2025\), Department for Business and Trade](#)

⁴ [West of England Local Industrial Strategy \(2019\), West of England Combined Authority](#)

services. It highlights the requirement for flexible, high-quality spaces for research and development, as well as collaborative hubs and innovation clusters.

The West of England Growth Strategy (September 2025)

The West of England Growth Strategy⁵ was published in September 2025 and covers a 10-year period.

The Strategy identifies the following 'sectors for growth' within the West of England, which it states will drive the region's potential for growth:

- Advanced manufacturing
- Digital and technologies
- Clean Energy Industries
- Creative Industries
- Everyday Economy

The Growth Strategy identifies Central Bristol and Bath as one of five 'growth zones' within the region. As part of this, it identifies the 'Bath City Centre opportunity' to rebalance Bath's dependency on tourism by shifting the centre of gravity towards innovation-based businesses within Bath Riverside Innovation District in high value growth sectors, such as Digital & Technologies and Advanced Manufacturing. It also identifies the 'Bristol to Bath Corridor opportunity', with the opportunity for master planning that allows communities at Hicks Gate, Keynsham, and Saltford to expand, with public investment enabling the delivery of 10,000 new jobs in industrial, service and creative sectors. Somer Valley comprises another of these key 'growth zones', particularly through the Somer Valley Enterprise Zone (SVEZ) which addresses the current shortage of small business premises and is predicted to create a minimum of 1,300 jobs.

Overall, it highlights the need to expand employment space including office, industrial, and specialist research and development facilities, as well as regenerate high streets and industrial areas. This includes prioritising land for specialist commercial development to meet the needs of sectors for growth identified (advanced manufacturing, digital, clean energy, creative industries), as well as supporting business growth by offering scale-up support for start-ups, spinouts, and Small and Medium Enterprises (SMEs), particularly in high-growth sectors.

⁵ [West of England Growth Strategy \(2025\), West of England Combined Authority](#)

2.3. Local Policy and Strategy

B&NES Core Strategy (July 2014), Placemaking Plan (July 2017) and Local Plan Partial Update (January 2023)

The Core Strategy, Placemaking Plan and Local Plan Partial Update (LPPU)⁶ establish the strategic policy framework for the development and use of land in B&NES up to 2029. The Core Strategy was adopted in July 2014; the Placemaking Plan in July 2017; and the LPPU in January 2023.

The Core Strategy and Placemaking Plan outlines a series of key strategic objectives, including the following relevant objectives:

Objective 1: Pursue a low carbon and sustainable future in a changing climate

- *ensuring the location and layout of new development enables and encourages people to make the fullest possible use of public transport, walking and cycling*

Objective 3: Encourage economic development, diversification and prosperity

- *increasing the availability of modern office and unit space in Bath thereby enabling indigenous companies to expand and the city to better respond to external demand*
- *maintaining an appropriate supply of land in Bath for industrial processes and services to ensure the city retains a mixed economy*
- *capitalising on innovation opportunities arising from higher education institutions, improving educational facilities to help provide the skills that support knowledge-based sectors and retaining those skills and talents in the city and wider area*
- *repositioning Keynsham as a more significant business location enabling it to attract new employers to compensate for the closure of Cadbury Somerdale*
- *ensuring that a sufficient and responsive supply of appropriate land and premises is available and improvement of skills is facilitated at Midsomer Norton and Radstock to help strengthen their roles as employment centres for the southern part of the District*
- *enabling small scale local employment development, including those related to innovation opportunities, in the rural areas*

Objective 4: Invest in our city, town and local centres

- *Bath city centre and Keynsham, Midsomer Norton and Radstock town centres need to be improved as centres for social and economic activity and as places for entertainment, culture and shopping. The local and neighbourhood centres across the urban and rural parts of the District need to be sustained, so they continue to play an important role in meeting the day to day needs of their local residents.*

⁶ [Core Strategy \(2014\), Placemaking Plan \(2017\) and Local Plan Partial Update \(2023\), B&NES Council](#)

- *enhancing Bath's central shopping area, to maintain its competitiveness, diverse offer and reputation for independent and niche retailing*
- *introducing more commercial space, suitable for a range of enterprises, as part of new mixed use developments on underperforming sites in and close to Bath city centre*
- *improving the quality and capacity of shops within the core of Keynsham and Midsomer Norton town centres*
- *introducing more office and residential floor space into Keynsham, Midsomer Norton and Radstock town centres*

B&NES Economic Strategy 2024-2034 (March 2024)

The B&NES Economic Strategy⁷ was published in March 2024 and covers a 10-year period from 2024 to 2034. It outlines 'six strategic pillars', which provide the framework for the development of the economy of Bath and North-East Somerset. Of particular relevance to this ELR are the pillars surrounding resilient businesses and creativity & innovation:

- Resilient businesses - the Strategy outlines a need to invest in infrastructure business needs to support local businesses to stay and scale in Bath and North-East Somerset, as well as nurture emerging sectors and specialisms, including the culture and creative sectors, with the goal to improve access to employment industrial/office/retail space across the region to meet demand.
- Creativity and innovation - the Strategy outlines an objective of establishing Bath and North-East Somerset as a centre for scientific and health academic excellence, inclusive innovation and creativity.

B&NES Employment Growth and Employment Land Review (March 2020)

The B&NES Employment Growth and Employment Land Review⁸ aims to provide a robust evidence base to underpin the refresh of the B&NES Economic Development Strategy and Local Plan. It should however be noted the review is based on analysis closely linked to the now withdrawn West of England Joint Spatial Plan (as per recommendation from PINS).

The study sets out three alternative employment growth scenarios to consider the share of West of England growth that might reasonably be located within Bath and North-East Somerset:

- Scenario 1 - Oxford Economics (part of the West of England forecasting package): less than 11% of West of England total jobs growth is allocated to the B&NES area. After applying a 1.1% uplift, total forecast employment growth is 8,850 jobs over the period 2016-36.

⁷ [B&NES Economic Strategy 2024-2034 \(2024\), B&NES Council et al.](#)

⁸ [B&NES Employment Growth and Employment Land Review \(2020\), Hardisty Jones](#)

- Scenario 2 - Current Shares (based on current share of employment): 15% of West of England total jobs growth is allocated to the Bath and North-East Somerset area. After applying a 1.1% uplift, total forecast employment growth is 12,250 jobs over the period 2016-36.
- Scenario 3 - Dynamic Shares (based on past trend analysis to estimate potential changes to the share of employment): 14% of West of England total jobs growth is allocated to the Bath and North-East Somerset area. After applying a 1.1% uplift, total forecast employment growth is 11,450 jobs over the period 2016-36.

It estimates additional demand of 100,000 sqm for office and 120,000-200,000 sqm for industrial and warehousing over the period 2016-36.

B&NES Future Economic Needs Assessment Update (May 2025)

The B&NES Future Economic Needs Assessment Update⁹ sets out an updated economic and employment land demand forecast, an updated commercial market summary and updates to the quantitative assessment of allocated and consented employment sites and premises supply.

It estimates an additional 28,000 jobs needed during the period 2023–2043, up from 15,000 in the February 2024 Future Economic Needs Assessment. It outlines that this uplift is driven by the higher level of housing anticipated to be delivered following revisions to the Standard Method for assessing local housing need. Consequently, the study identifies a number of sectors anticipated to grow as a result of population growth and policy drivers across Bath and North-East Somerset.

Population driven growth sectors:

- Education;
- Health;
- Retail;
- Transport;
- Food service;
- Arts and recreation;
- Other services (e.g. hair and beauty); and
- Construction (as a result of higher levels of house building and increased maintenance requirements).

Policy driven growth sectors:

- 'Going Green' including retrofit;
- Professional, scientific and technical;
- Creative and cultural (including the National Centre for Fashion and Sustainability);

⁹ [B&NES Future Economic Needs Assessment Update \(2025\), Hardisty Jones Associates](#)

- Health science; and
- Regional strength alignment including advanced manufacturing, low carbon, fintech, Information and Communication Technology (ICT) and digital

The assessment translates this additional demand into a spatial requirement for additional floorspace and/or land across different employment typologies as follows. The update identifies an additional need (relative to the previous FENA) of +25,000sqm office floorspace, 6 – 11ha of industrial land and an additional 3 – 4ha of dedicated provision for warehousing and logistics. As such, the FENA 2025 identifies a total need for the following employment provision in the period between 2023 and 2043:

- Offices: +119,000 sqm
- Industrial land: +21–24 ha.
- Warehousing & logistics: +18 – 19 ha

Broadly, the assessment sets out that demand for offices will be concentrated in Bath City, and industrial and warehousing more evenly spread, with Somer Valley having notable industrial requirements.

It also highlights the implications of the 2024 update to the NPPF, particularly around supporting 'development to meet the needs of a modern economy'. The FENA sets out that provision should be made for enabling capacity for data centres and lab space linked to research and innovation clusters.

B&NES Future Economic Needs Assessment Update Addendum (August 2026)

The B&NES Future Economic Needs Assessment (FENA) has had addendum published in August 2026. The addendum follows the same methodology applied in the 2024 FENA and the 2025 updated FENA. The 2025 update was in relation to the increase in housing need as a result of the standard method and the implication on employment needs. This addendum has been produced in response to the emerging local plan level of proposed housing provision. The housing provision in the emerging local plan is lower the levels assessed within the 2025 FENA update which considered housing provision against potential workforce and the resulting employment land provision.

The 2026 Addendum identifies the overall requirement during the emerging local plan period of 2025 – 2043:

- Offices: 94, 00 – 96, 000 sqm
- Industrial land: 15.7 – 18.5 ha
- Warehousing & logistics: 14.6 ha

The reduction in overall requirement for employment typologies is in line with the reduction in total housing provision across the plan period. Even with the reduction in

the requirement for employment land as result of the housing provision decreasing the report does note that even against the re-assessed levels of requirement these employment requirement figures are still above historic delivery and therefore the retention of existing employment sites is promoted as well as the delivery of upgraded premises.

B&NES Local Plan Options Document 2025 (October 2025)

The emerging B&NES Local Plan has just completed its Reset Options Document Consultation in November 2025. The Options Document¹⁰ sets out the spatial priorities for the Local Plan, which sets out an ambition to create a fairer, more prosperous and sustainable economy and maximise the delivery of housing that is affordable.

In explaining the strategic priorities for jobs and employment space, references to the adopted Economic Strategy (March 2024) have been made. The Economic Strategy outlines how B&NES is drawing on the principles of 'Doughnut Economics' to seek to transform the B&NES economy to one which is more prosperous, greener and fairer. Through the Economic Strategy B&NES will focus its actions in three broad themes:

- Infrastructure which supports a green and connected future;
- Innovation that drives a creative economy;
- Opportunity unlocked for everyone so that we are fair and inclusive.

The Options Document also makes references to the West of England Combined Authority's (WECA) Growth Strategy (September 2025) which focuses on the following geographical areas that also reflect the area of focus in B&NES' Economic Strategy:

- **Bristol and Bath Growth Zone** - more specifically, it encompasses the Bristol to Bath Corridor and Bath City Centre areas which has strong investment potential. The Bristol to Bath Corridor offers an opportunity to join the economies of the two cities into one integrated conurbation, which will be unlocked through a well-connected, sustainable multi-modal transport corridor. Meanwhile, Bath City Centre, which is at the heart of the regional visitor economy, will continue to strengthen the visitor offer and have a wide range of new employment sites to assure the long-term vibrancy of this unique city.
- **Somer Valley Growth Zone** - which encompasses the Somer Valley Enterprise Zone, industrial estates and the market towns of Radstock, Midsomer Norton, Westfield and beyond, where there will be a focus on sustainability and industrial developments.

¹⁰ [Local Plan Options Document 2025 \(2025\), B&NES Council](#)

2.4. Summary

National policy, including the NPPF and the UK's Modern Industrial Strategy (2025), outlines the importance of providing sufficient employment land, particularly to meet the requirements of emerging high growth industries which it states will be critical for the UK's competitiveness.

At the subregional level, the West of England's Industrial (2019) and Growth Strategies (2025) reinforce this by highlighting the region's global innovation strengths and identifying advanced manufacturing, digital technologies, clean energy and creative industries as core drivers of growth. These strategies also advocate for the expansion of high-quality research, development and industrial space, highlighting opportunities within key 'growth zones', such as Bath City Centre, the Bristol-Bath Corridor and the Somer Valley Enterprise Zone.

The adopted Local policy and associated strategies further underline the need for Bath and North-East Somerset to build a modern economy through improving access to employment space, enabling business scale up, and accommodating significant projected job and floorspace growth. The Future Economic Needs Assessment Update (2025) points to substantial increases in demand for office, industrial and logistics space, alongside sectoral growth in professional services, health sciences, creative industries and low carbon technologies.

Overall, the review indicates that there is a focus within policy on the clustering of high growth industries owing to the positive effects this has on growth and productivity. In particular, industries such as advanced engineering/manufacturing, creative, digital / Information Technology (IT), fintech, and health; which are identified across national, sub-regional and local policy.

3. Methodology

3.1. Sites overview

The sites that are the subject of this assessment are geographically diverse, accommodate a variety of employment types and provide a range of opportunities for employment growth through the plan period. In broad terms, their spatial and functional distribution can be summarised as:

Bath City Centre and Quays Cluster

This cluster includes sites such as:

- Green Park Station West
- Bath Quays North
- South Quays
- South Bank
- Manvers Street
- Cattlemarket

These sites are predominantly brownfield and highly accessible, located within or adjacent to Bath city centre, integrated within the primary commercial and employment core and characterised by strong public transport connectivity and proximity to a large workforce. They represent the highest-value employment locations within the authority and are typically suited to:

- Office-based employment
- Knowledge-led and professional services
- Innovation and research uses
- Mixed-use schemes with supporting commercial uses

Edge-of-Centre and Riverside Regeneration Areas

Including sites such as:

- Sydenham Park
- Pinesgate
- Roseberry Place
- Brassmill Lane / Locksbrook Estate Road / Weston Island (“the Production Quarter”)

- Odd Down

These areas form part of a wider employment corridor along the River Avon, provide opportunities for regeneration and intensification whilst accommodating a mix of office, light industrial, and flexible workspace. They play an important role in supporting growth and diversification of Bath's employment offer.

Keynsham and Strategic Corridor Sites

Sites including:

- Land adjoining East Keynsham
- Riverside Fire Station
- North Keynsham
- Durley Farm
- Devonport House

These locations sit within the Bristol to Bath growth corridor and serve a secondary employment function relative to Bath. They are typically suited to:

- Small-scale office and service uses (town centre sites)
- Light industrial or logistics uses (edge-of-settlement sites)

Somer Valley Strategic Employment Areas

Key sites include:

- Somer Valley Enterprise Zone
- Midsomer Enterprise Park
- Westfield Industrial Estate
- Old Mills Industrial Estate expansion
- Bath Business Park

These sites typically represent the primary industrial and logistics locations within North-East Somerset. Providing capacity for:

- General industrial (B2)
- Logistics and distribution (B8)
- SME workspace and manufacturing

They play a critical role in supporting local employment and economic resilience across the Somer Valley.

Town Centre and Local Service Employment Sites

Sites include:

- Midsomer Norton High Street
- Riverside Fire Station
- Keynsham Town Centre

These sites are smaller in scale, serve localised economic functions and support:

- Office-based employment
- Retail and service uses
- Community and mixed-use development

Rural and Edge-of-Settlement Sites

Sites such as:

- Box Road (Bathford)
- Westway Farm
- East Whitchurch
- North and East Radstock

These locations are generally less accessible by sustainable modes and have more limited market demand. They are typically suited to:

- Small-scale employment
- Rural business uses
- Mixed-use schemes with a modest employment component

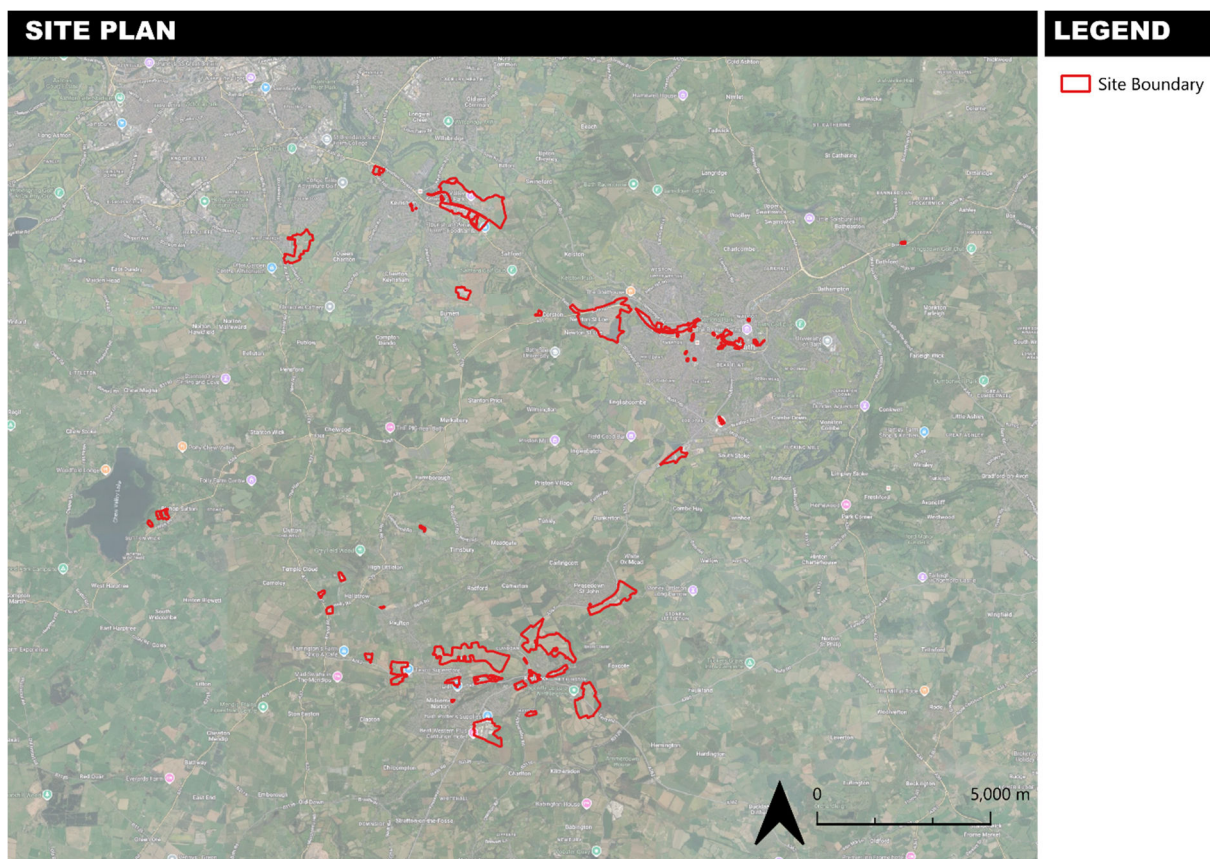


Figure 3.1-1 - Map of all sites assessed – Image showing the extent of the area of assessment with site boundaries outlined in red line.

3.2. Assessment overview

This assessment applies a three-staged analytical framework to provide a structured and consistent basis for the evaluation of sites across Bath & North-East Somerset.

First, site suitability has been assessed having regard to a range of locational, planning, environmental and market considerations. This element of the analysis draws on previous evidence base documents, including earlier site assessments and the Council’s HELAA work, alongside the findings of Stage 1 of this study.

Second, site capacity has been derived through the application of a standardised approach that considers how primary and secondary site constraints affect the area of the site available for development before applying a series of plot ratios that relate to an assigned employment typology. Site capacity is presented as a series of floorspace scenarios to represent differing intensities of development (low, medium and high), noting that the most appropriate capacity in each case should be determined through more detailed site-specific consideration and/or policy ambition.

The analysis has been informed by targeted engagement with property agents. This has provided qualitative insights into the figures produced through the floorspace

calculations, enabling the quantitative outputs to be interpreted and understood within a realistic market context.

3.3. Sites Appraisal

This section provides an assessment of the 58 strategic sites provided to AtkinsRéalis by B&NES for the consideration of inclusion within the emerging Local Plan. The Sites comprise a range of existing employment locations with the potential for continued or more intensive employment use and new allocations that might be suitable for employment use. A large number of the sites have existing commercial occupiers and, in many cases, particularly across larger sites, ownership is fragmented. This means that opportunities for comprehensive redevelopment or intensification of employment uses can be challenging and some sites will as a result likely remain in their current state in the short to medium term or evolve incrementally. The analysis evaluates their suitability / desirability for accommodating employment or, in some cases, mixed-use development, by assessing their performance against a range of criteria that underpin successful employment locations. This analysis provides a consistent, transparent appraisal of each site, highlighting their relative strengths and weaknesses and helping to inform decision making around spatial options and future allocations.

To ensure consistency across a diverse range of locations, each site has been assessed using the agreed scoring methodology, which draws upon criteria established in previous evidence bases and refined for this study. These criteria include:

- **Placemaking and development quality** - the extent to which a site can support high-quality design, integration with the surrounding urban fabric, and the delivery of well-functioning, attractive places;
- **Vehicular and active travel accessibility** –the quality of access to the strategic and local road network, together with the availability of sustainable transport options including walking, cycling, and public transport;
- **Proximity to services** – the accessibility of local amenities, services and facilities that support day-to-day business operations and employee needs;
- **Character and land use context** – the compatibility of the site with surrounding uses and its role within the existing spatial and functional structure of the area;
- **Commercial market strength** – the attractiveness of the site to the market, having regard to location, demand characteristics and its ability to support viable employment uses;
- **Workforce availability** – the accessibility of an appropriate labour pool, including proximity to residential areas and connectivity to wider labour markets;

- **Digital and utilities infrastructure** – the availability and capacity of supporting infrastructure, including power, broadband connectivity and other essential utilities; and
- **Environmental and heritage constraints** – the presence of environmental, heritage or policy designations that may constrain development or require mitigation.

Scores for each criterion are presented using a five-point traffic light system, with higher scores indicating stronger performance. The definitions for each score, along with the full assessment pro forma, are set out in Appendix 1, and should be referred to when interpreting the site-by-site findings. A score of 1 illustrates a fundamental constraint which seriously harms the site's functioning as an employment location. Even where typical constraints would suggest that a site is a good candidate for future employment use, the assessment highlights any site-specific factors that might undermine this ambition and make sites better suited to alternative uses.

Traffic Light Ratings	
5	Please Refer to Appendix B (Site Assessment Pro Forma) for additional insight on scoring credentials
4	
3	
2	
1	

Assessments draw on publicly available data, insight drawn from the wider Local Plan evidence base and site-specific information to provide a robust assessment of a site's potential to accommodate continued/expanded employment use. To align with the council's wider analysis of site availability and deliverability, the assessment also draws on the 'primary' and 'secondary' constraints identified through the council's Housing and Employment Land Availability Assessment (HELAA), as below:

Table 3.3-1 - Overview of primary and secondary constraints

Primary	Secondary
• Ecological sites subject to international protections, including Ramsar sites, Special Protection Areas and (SPAs) and Special Areas of Conservation (SACs); • Sites of Special Scientific Interest (SSSIs); • National Nature Reserve (NNR); • Local Nature Reserves (LNR);	• Green Belt • Area of Outstanding Natural Beauty (National Landscapes) • Existing policy allocations and safeguarding areas • Local Green Space • Fluvial Flood Risk • Risk of surface water flooding • Groundwater Source Protection Zone

• Regionally Important Geological Sites (RIGS); • Flood Zone 3; • Ancient Woodland; • Scheduled Ancient Monuments; • Registered Battlefields; • Registered Parks and Gardens; and, • Common Land.	• Wansdyke or Somersetshire Coal Canal • Priority Habitats • SNCI • Green Infrastructure Network (Policy) • Ecological Network and Connectivity Opportunities (Policy) • Tree Preservation Order • World Heritage Site and its indicative setting extent • Conservation Areas • Listed Buildings • Undesignated heritage assets • Landscape setting of settlements • Cycle Routes • Public Rights of Way • Air Quality Management Areas • Town Centres and Employment Zones • Unstable Land • Contaminated Land Register • Historical Landfill • Agricultural Land Quality • Noise Important Areas (NIA)
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Each site assessment concludes with a summary providing a recommendation as to the site's potential to accommodate employment use, highlighting key opportunities and constraints. In line with the approach advocated in Planning Practice Guidance (PPG), sites are categorised as **Suitable**, **Potentially Suitable** or **Unsuitable** for employment use:

- **Suitable:** Site provides an appropriate location for continued or future employment use with only minor constraints that can be navigated through the planning process
- **Potentially suitable:** Site provides a potentially appropriate location for development subject to further technical investigation and/or mitigation to address identified locational or site specific constraints
- **Unsuitable:** Site is subject to one or more fundamental constraints which could not be reasonably mitigated to provide an appropriate location for employment development

Where sites have been identified as suitable for continued or new employment use, they have been assigned a recommendation to either “**protect**”, “**infill / expand**” or “**redevelop**” as follows:

- **Protect:** Site is operating at capacity or is identified as having no further potential for uplift in floorspace as a result of identified constraints or site

characteristics. It should be protected as a valued part of existing employment land supply.

- **“Infill / expansion”**: The site offers the potential for more intensive or expanded employment use via infill development opportunities and/or expansion to adjoining land
- **“Redevelop”**: Site is vacant and/or greenfield and provides a relatively unconstrained opportunity for the provision of new employment floorspace

An overview of the site appraisal process is set out below, with further detail presented in Appendix A. Summaries are provided for each of the broad geographical locations identified in the emerging Local Plan: Bath, the Bath to Bristol Corridor (including Keynsham), Somer Valley and Rural Areas. In each case, a distinction is made between existing employment sites, existing site allocation and proposed site allocations. Sites have also had a classification with a recommendation of protect, infill or redevelopment which is set out in the tables below and further explained in the site appraisals in Appendix A. The site appraisal is intended to inform decision-making around site allocations and the relative split between sites suited to different employment sectors to meet the diverse needs that exist across the commercial market in B&NES.

Table 3.3-2 - Site Appraisal Summary – Bath.

The table below summarises the site appraisals for sites in Bath having considered factors including Placemaking, Access, Active Travel, Character, Market, Workforce, Power/Digital, Environment and Heritage with an overall score and recommendation of protect, infill or redevelop.

Site	Placemaking	Access	Active travel	Character	Market	Workforce	Power / Digital	Environment	Heritage	Overall	Recommendation
Existing Sites											
Production Quarter (Brassmill Lane / Locksbrook Road Estate and The Maltings)	5	3	4	3	4	4	5	4	3	35	Infill / expansion
Bath Self Storage, Bellotts Road, Twerton	4	3	3	3	4	4	5	5	4	35	Protect

Site	Placemaking	Access	Active travel	Character	Market	Workforce	Power / Digital	Environment	Heritage	Overall	Recommendation
(merged with M&B Engineering)											
Bath Trade Park, Westmoreland Station Road, Westmoreland	4	3	4	4	4	4	5	4	3	35	Infill / expansion
Booker McConnell Plc, Bellotts Road, Twerton	4	3	4	3	4	4	5	4	3	34	Protect
Broadway Court, Miles Street, Widcombe	1	2	4	3	3	4	4	4	4	29	Protect
Commercial buildings north of Dartmouth Avenue, Twerton	4	3	3	2	3	3	5	4	4	31	Infill / expansion
Commercial space, Cheltenham Street, Bath & Cheltenham Road	3	3	4	3	3	4	4	4	4	32	Protect
Commercial space, Lymore Gardens, Twerton	4	2	3	3	3	4	5	5	4	33	Protect
Cross Manufacturing, Midford Road, Odd Down	4	3	3	3	3	3	5	3	4	31	Infill / expansion
Ferry Court, Ferry Lane, Bathwick	1	3	4	3	3	4	4	4	5	31	Protect
Polamco, Western Lock, Lower Bristol Road	5	4	5	4	3	4	4	4	3	36	Protect
Railway Arches, Wood Street, Lower Bristol Road	1	3	5	4	3	4	4	4	3	31	Protect

Site	Placemaking	Access	Active travel	Character	Market	Workforce	Power / Digital	Environment	Heritage	Overall	Recommendation
Stable Yard Industrial Estate, Windsor Bridge Road, Twerton	5	4	4	3	3	3	4	4	3	33	Infill / expansion
Victoria Park Business Centre, Kelso Place, Lower Weston	5	4	4	3	3	4	3	4	3	33	Infill / expansion
Workman's Yard, Claude Avenue, Twerton	3	2	4	3	2	3	5	4	3	29	Infill / expansion
Existing Allocations											
Green Park Station West, SB7A	5	4	4	5	5	5	4	4	2	38	Infill / expansion
Sydenham Park (including Pinesgate & Pinesway Industrial Estate), SB7B	5	4	4	4	5	5	4	4	3	38	Infill / expansion
Cattlemarket Site, SB1	5	4	4	5	4	4	5	4	3	38	Redevelop
Manvers Street, SB3	5	4	5	5	5	5	4	4	2	39	Infill / expansion
Bath Quays North & Bath College, SB4	5	4	5	4	5	5	4	4	3	39	Infill / expansion
South Quays & Riverside Court, SB5	5	4	5	3	5	5	4	4	3	38	Infill / expansion
South Bank, SB6	5	4	4	3	5	5	4	3	4	37	Protect
Roseberry Place, SB10	5	4	4	3	4	4	5	4	4	37	Redevelop
Proposed Allocations											

Site	Placemaking	Access	Active travel	Character	Market	Workforce	Power / Digital	Environment	Heritage	Overall	Recommendation
SW of the Odd Down Park & Ride	4	4	4	2	4	4	5	3	3	33	Redevelop

Table 3.3-3 - Site Appraisal Summary – Bristol to Bath Corridor.

The table below summarises the site appraisals for sites in the Bristol to Bath Corridor having considered factors including Placemaking, Access, Active Travel, Character, Market, Workforce, Power/Digital, Environment and Heritage with an overall score and recommendation of protect, infill or redevelop.

Site	Placemaking	Access	Active travel	Character	Market	Workforce	Power / Digital	Environment	Heritage	Overall	Recommendation
Existing Sites											
Ashmead Road & Unity Road Estate, including World's End Lane Extension	4	4	3	4	4	4	4	3	5	35	Infill / expansion
Broadmead Lane Industrial Estate	2	2	1	3	4	4	4	2	4	26	Protect
Wansdyke Workshops, Unity Road, Keynsham	3	4	2	3	3	4	4	4	5	32	Infill / expansion
Existing Allocations											

Site	Placemaking	Access	Active travel	Character	Market	Workforce	Power / Digital	Environment	Heritage	Overall	Recommendation
Land adjoining East Keynsham KE3A	3	3	3	3	3	4	3	3	4	29	Infill / expansion
Riverside and Fire Station	4	3	4	3	4	4	5	4	3	34	Infill / expansion
Proposed Allocations											
East Whitchurch Village	4	4	3	3	2	4	5	4	3	32	Redevelop
North Keynsham	3	3	3	4	4	3	4	2	3	29	Redevelop*
Ashton Way and Labbott Car Parks	4	3	4	4	4	4	5	4	3	35	Redevelop
Durley Farm	4	4	3	2	4	3	4	3	4	31	Redevelop
Devonport House	4	3	3	2	4	3	3	3	4	29	Redevelop

**While North Keynsham is identified as a site suitable for redevelopment, it is assumed that additional employment provision would be focused on the land that is currently allocated (Land adjacent to East Keynsham) and that the more substantial part of the proposed allocation to the north of the railway line would be predominantly residential with supporting ancillary uses.*

Table 3.3-4 - Site Appraisal Summary - Somer Valley.

The table below summarises the site appraisals for sites in Somer Valley having considered factors including Placemaking, Access, Active Travel, Character, Market, Workforce, Power/Digital, Environment and Heritage with an overall score and recommendation of protect, infill or redevelop.

Site	Placemaking	Access	Active travel	Character	Market	Workforce	Power / Digital	Environment	Heritage	Overall	Recommendation
Existing Sites											
Coombend, Radstock	3	3	3	3	3	3	5	4	3	30	Infill / expansion
Mill Road, Radstock	4	3	3	3	3	3	5	3	4	31	Infill / expansion
Haydon Industrial Estate, Radstock	4	3	2	3	3	3	4	4	4	30	Infill / expansion
Midsomer Enterprise Park, Radstock	5	4	3	3	3	3	4	4	3	32	Infill / expansion
Farrington Fields Trading Estate, Farrington Gurney	3	3	1	3	3	3	4	5	5	30	Infill / expansion
Wansdyke Workshops, Peasedown	4	3	3	3	2	3	4	5	5	32	Infill / expansion
Existing Allocations											
Former Paulton	4	3	2	1	3	3	3	2	5	26	Redevelop

Site	Placemaking	Access	Active travel	Character	Market	Workforce	Power / Digital	Environment	Heritage	Overall	Recommendation
Printworks, SSV22											
Central High Street, Midsomer Norton, SSV1	5	3	3	3	3	4	5	4	3	33	Infill / expansion
Former Welton Manufacturing Site, SSV4/LPPU	5	4	3	3	3	3	5	3	4	33	Infill / expansion
Somer Valley Enterprise Zone, SSV9	3	4	3	4	4	4	2	4	5	33	Redevelop
Old Mills Industrial Estate Expansion, SSV9	3	4	3	3	4	4	2	4	5	32	Infill / expansion
Bath College Somer Valley Campus, SSV18	4	4	3	2	4	5	5	4	3	34	Infill / expansion
Proposed Local Plan Allocations											
Land Adjacent to Bath	5	4	2	3	3	3	4	5	5	34	Infill / expansion

Site	Placemaking	Access	Active travel	Character	Market	Workforce	Power / Digital	Environment	Heritage	Overall	Recommendation
Business Park											
Westfield Industrial Estate	4	3	3	3	2	4	4	4	4	31	Redevelop
East Radstock	4	4	3	1	3	4	4	4	4	31	Redevelop*
North Radstock	3	4	3	2	3	4	5	4	3	31	Redevelop*

**While East Radstock and North Radstock are identified as sites suitable for redevelopment, they are allocations for major greenfield extensions and is expected that they will be predominantly residential, rather than employment led.*

Table 3.3-5 - Site Appraisal Summary - Rural Areas

The table below summarises the site appraisals for sites in Rural Areas having considered factors including Placemaking, Access, Active Travel, Character, Market, Workforce, Power/Digital, Environment and Heritage with an overall score and recommendation of protect, infill or redevelop.

Site	Placemaking	Access	Active travel	Character	Market	Workforce	Power / Digital	Environment	Heritage	Overall	Recommendation
Existing Sites											
Church Farm Business Park, Ashton Hill, Corston	2	3	2	2	3	3	3	5	5	28	Infill / expansion
Cloud Hill Industrial Estate/Trident Works, Temple Cloud	2	2	1	3	3	2	4	4	4	25	Infill / expansion
Hallatrow Business Park, Wells Road, Hallatrow	4	4	1	3	3	3	4	4	5	31	Infill / expansion
Temple Bridge Business Park, Temple Cloud	4	4	2	3	3	3	5	4	4	32	Infill / expansion
Timsbury Village Workshops, Hayeswood Road, Timsbury	2	3	1	2	2	3	2	3	4	22	Infill / expansion
Burnett Business Park, Gypsy Lane, Keynsham	2	2	2	3	3	3	3	4	5	27	Infill / expansion

Proposed Draft Allocations											
Box Road, Bathford	2	4	1	2	2	2	2	2	5	22	Redevelop
Extension to Westway Farm Rural Business Park, Bishop Sutton	4	3	2	2	3	3	4	3	3	27	Redevelop

3.4. Capacity and floorspace assessment

The approach to determine potential site capacities has been devised to ensure a consistent, proportionate and transparent approach to identify the opportunities for development that existing across the B&NES geography and across a number of employment typologies. The assessment is informed by a wide range of planning and environmental constraint information to inform capacity modelling in an approach that is consistent with national planning practice guidance on economic land availability.

The assessment is designed to support plan-making and strategic option testing, rather than provide detailed, site-specific development appraisals. As such, outputs are presented as indicative ranges reflecting uncertainty and variation in site characteristics, market conditions and design outcomes.

The model follows a structured, staged process applied consistently across all sites:

Constraints assessment to determine net developable area

A key stage in the assessment is the conversion of gross site area into a realistic net developable area, reflecting physical, environmental and policy constraints. This is undertaken by applying a constraints hierarchy that acknowledges the relative impact of different constraints on development potential:

- **Exclusions** - Land physically or policy-precluded from development is removed entirely (100% exclusion from gross area). For example, functional floodplain (Flood Zone 3b) / water bodies, ecological designations including SSSI, SAC, SPA, Ancient woodland and/or major infrastructure corridors
- **Partial reductions** - Land that may still be developed but with implications for site layout, viability and/or requiring significant mitigation at the expense of site capacity. Examples include Flood Zones 2 and 3a, the presence of heritage assets.
- **Density Modifiers** - A further category of constraints is used to influence development intensity rather than land take. These include Green Belt and National Landscape designations or proximity to heritage assets including the World Heritage Site, Listed Buildings or Conservation Areas, where development might affect the Outstanding Universal Value or setting of those assets

This approach ensures a transparent and consistent gross-to-net conversion across all sites. Where data limitations exist or site-specific issues are obvious, the model incorporates a mechanism for planner override or sensitivity testing, ensuring that professional judgement remains central to the assessment.

Assign an appropriate employment typology

Each site is assigned a primary employment typology to reflect its most likely form of development. Typologies are aligned with the Use Classes Order and Homes England employment density guidance, and include:

- Town centre office (E(g)(i))
- Business park office
- Research & Development (R&D) / innovation
- Light industrial / SME workspace
- General industrial (B2)
- Logistics / distribution (B8)
- Mixed employment estate

These typologies provide a consistent framework across all sites and reflect typical UK employment development patterns. Given that the precise mix of uses on individual sites remains uncertain at this stage, the typology categories enable a high-level assessment of development potential. Typology selection has been informed by local planning strategy, surrounding land uses/context, accessibility, and the detailed site appraisals undertaken as part of this study. Section 3.1 (Site Overview) summarises the key themes emerging from these appraisals.

Site capacities

Site capacity has been calculated by applying a plot ratio to the net developable area of each site.

Net developable area is derived from the gross site area, with land affected by environmental or physical constraints excluded or proportionately reduced depending on the nature of the constraint.

Each site has been assigned an employment typology reflecting the likely form of development, based on planning judgement, site context and comparison with similar existing uses in the area. A plot ratio range, expressed as low, mid and high scenarios, has been applied to each typology.

Plot ratio is defined, consistent with RICS guidance on land measurement for planning and development purposes, as the ratio of total development floor area to site area. Floorspace capacity for each site has therefore been calculated as: $\text{Net developable area} \times \text{plot ratio} = \text{indicative floorspace (sqm GIA)}$ Plot ratios have been informed by published UK employment land evidence.

Outputs are expressed as ranges rather than single figures, in line with Planning Practice Guidance on using proportionate assumptions on development potential where detailed site designs are not yet available. This approach is intended to support plan-making rather than site-specific design and does not represent a masterplan or fixed capacity for any individual site.

This approach is integral to the assessment, as it reflects the inherent uncertainty associated with design evolution, site deliverability and future policy requirements. Presenting a range of capacity scenarios means that outputs remain flexible and realistic at this stage of plan-making. Further detail is provided in Appendix 3.

3.5. Market engagement

Agents were engaged at Stage 1 of the study to provide high-level market intelligence. At this stage, discussions focused on gathering strategic insights into the local employment market, including demand trends, sector preferences and locational drivers rather than being site-specific. Through this engagement consistent trends emerged relating to employment needs across different typologies and geographies, these are outlined below:

- **Industrial/logistics opportunity is pronounced**

Broad consensus on undersupply of industrial space (including distribution hubs) and strong demand for starter/light industrial units, especially around Keynsham with motorway access. Prioritise office/logistics allocations and deliver serviced plots that can scale with SMEs.

- **Office market = flight to Grade A in central Bath**

Occupiers want high-quality, amenity-rich, station-adjacent space meeting ESG standards; examples like Royal Mead show record rents, signalling that premium supply can perform. Avoid out-of-town office locations where demand is weak.

- **Viability and yields are the central delivery barrier**

Even partly pre-let/sold schemes can look unviable. Expectation is for public-sector enablement and collaboration (infrastructure, land assembly, incentives) to de-risk schemes, akin to Bristol's Temple Quarter stimulus.

- **Connectivity dictates success - protect employment land**

Poorly connected areas (e.g. some parts of Somer Valley) are repeatedly flagged as weak; Keynsham benefits from Bristol integration. Without protecting employment land and improving transport links, Bath risks becoming a commuter city.

- **Sectoral niches to watch**

Life sciences (as an Ox-Cam overspill), defence/aerospace links regionally, and online retail/distribution should shape detailed site typologies and fit-outs (lab-ready specs where appropriate, and last-mile logistics).

- **Immediate tactical gaps**

Create incubator/serviced office capacity, improve inward investment channels and address planning/communication gaps to rebuild market

confidence. Almost all agents discussed a need to support ambition in the market.

4. Site Analysis – Summary and Policy Recommendations

The below site analysis summarises the potential capacity of different sites through the application of the methodology described in Chapter 3. It allows a series of recommendations to be drawn for different cohorts of sites, distinguishing between existing employment allocations, proposed employment allocations and existing employment sites that remain unallocated.

4.1. Existing Allocation Employment Sites

To help ensure there is sufficient capacity to meet projected demand for employment land, existing employment allocations should continue to be protected and opportunities sought for infill, expansion and intensification of these sites. In the event that sites are developed for alternative uses prior to the Local Plan being adopted, additional land may need to be identified in order to maintain an effective supply and a diversity of sites to accommodate differing needs across employment markets and geographies.

Ten of the sites located in Bath are the subject of existing allocations in the extant Local Plan. Site appraisals concluded that all sites were suitable candidates for continued employment use, noting that heritage constraints including the presence/proximity to listed buildings and the World Heritage Site were factors that would very clearly influence future development potential. This issue, and other identified constraints, has been taken into consideration in determining the potential site capacities in the event of redevelopment – and heritage constraints in particular may limit the ability to achieve the “high” development scenario in some instances. Outputs of this assessment are summarised in Table 4.1.1, which sets out the developable area and the indicative floorspace capacities for each site, acknowledging existing provision.

Two sites are existing allocations in the Keynsham area (Bristol to Bath Corridor) and both were assessed as being suitable for employment development. Land adjoining the existing recycling centre provides a sizeable opportunity for additional employment provision and a link into the wider North Keynsham allocation, which is likely to be predominantly residential. The breakdown of the employment typology and developable area is shown in Table 4.1.2.

Six sites located in the Somer Valley were assessed and all determined to have potential for continued and/or expanded employment use, subject to key mitigation influencing the form and/or extent of any redevelopment of a number of sites. Sites across Somer Valley are varied in their size, location and employment typologies they are most likely to support. Notable opportunities for additional employment growth exist at Somer Valley Enterprise Zone and at Bath College’s Somer Valley Campus.

Table 4.1.3 sets out the developable areas, floorspace capacity and the outcomes of the site appraisal process that is detailed in the appendices of this report.

Table 4.1-1 - Existing Allocations - Bath Sites

The table below summarises the potential supply of employment floorspace across existing allocations in Bath. It sets out the potential developable area for each site, the capacity should they be redeveloped to different levels of intensity and the potential net uplift that could be achieved when recognising existing floorspace on site. A commentary is provided on the suitability of individual sites for employment use, drawing on the detailed appraisals set out in Appendix A.

Location	Gross area (ha)	Net Developable Area (ha)	Existing floorspace (sqm)	Development scenarios & potential floorspace (sqm)	Net uplift (sqm)	Employment Typology	Recommendation / Comments
Green Park Station West SB7A	2.69	2.43	33,251	Low 24,268 Mid 38,829 High 54,604	Low -8,983 Mid 5,578 High 21,353	Town centre office	Infill / expansion Existing retail occupier and listed building limit opportunity for significant uplift in floorspace. .
Sydenham Park, SB7B	1.22	0.89	997	Low 2,685 Mid 4,474 High 6,712	Low 1,688 Mid 3,477 High 5,715	Mixed employment estate	Infill / expansion

Location	Gross area (ha)	Net Developable Area (ha)	Existing floorspace (sqm)	Development scenarios & potential floorspace (sqm)	Net uplift (sqm)	Employment Typology	Recommendation / Comments
Pinesgate	0.23	0.20	-	Low 615 Med 1,025 High 1,537	Low 615 Med 1,025 High 1,537	Mixed employment estate	Infill / expansion
Pinesway Industrial Estate	0.55	0.49	2,807	Low 1,466 Med 1,954 High 2,687	Low -1,341 Med -853 High -120	Business Park Office	Protect Capacity testing suggests little potential for uplift in floorspace
Cattlemarket Site, SB1	0.38	0.38	776	Low 3,742 Mid 5,987 High 8,419	Low 2,966 Mid 5,211 High 7,643	Town centre office	Redevelop Opportunity for redevelopment of existing car park and reuse of Listed Building
Manvers Street, SB3	1.30	1.11	12,486	Low 11,040 Mid 17,663 High 24,839	Low -1,446 Mid 5,177 High 12,353	Town centre office	Infill / expansion Limited opportunity for infill / intensification on existing site

Location	Gross area (ha)	Net Developable Area (ha)	Existing floorspace (sqm)	Development scenarios & potential floorspace (sqm)	Net uplift (sqm)	Employment Typology	Recommendation / Comments
Bath Quays North & Bath College, SB4	4.36	3.00	16,393	Low 29,997 Mid 47,995 High 67,494	Low 13,604 Mid 31,602 High 51,101	Town centre office	Infill / expansion Southern half of site closest to the river suitable for more intensive employment use, but planning permission exists for mixed-use redevelopment
South Quays & Riverside Court, SB5	1.28	0.85	10,208	Low 8,527 Mid 13,463 High 19,186	Low -1,681 Mid 3,435 High 8,978	Town centre office	Infill / expansion Modest opportunity for additional infill/intensification following recent development across this site

Location	Gross area (ha)	Net Developable Area (ha)	Existing floorspace (sqm)	Development scenarios & potential floorspace (sqm)	Net uplift (sqm)	Employment Typology	Recommendation / Comments
South Bank, SB6	1.09	1.09	7451	Low 2,256 Mid 6,473 High 7,767	Low -5,186 Mid -978 High 316	Mixed employment estate	Protect Some limited opportunity for infill, but site has extensive coverage and neighbour relationship makes significant uplift challenging
Roseberry, Place SB10	0.49	0.49	n/a	Low 4,123 Mid 6,597 High 9,278	Low 4,123 Mid 6,597 High 9,278	Town centre office	Redevelop

Table 4.1-2 - Existing Allocations – Bristol to Bath Corridor

The table below summarises the potential supply of employment floorspace across existing allocations in the Bristol to Bath Corridor. It sets out the potential developable area for each site, the capacity should they be redeveloped to different levels of intensity and the potential net uplift that could be achieved when recognising existing floorspace on site. A commentary is provided on the suitability of individual sites for employment use, drawing on the detailed appraisals set out in Appendix A.

Location	Gross Area (ha)	Net Developable Area (ha)	Existing floorspace (sqm)	Development scenarios & potential floorspace (sqm)	Net uplift (sqm)	Employment Typology	Suitability for Employment Development
Land adjoining East Keynsham KE3A	8.67	8.67	11,984	Low 26,010 Mid 39,015 High 52,020	Low 14,026 Mid 27,031 High 40,036	Light Industrial / SME workspace	Infill / expansion Opportunity for additional development adj. to existing recycling centre
Riverside and Fire Station Site LPPU	0.08	0.08	263	Low 800 Mid 1,280 High 1,800	Low 537 Mid 1,017 High 1,537	Town centre office	Infill / expansion Opportunity for more intensive development subject to operational requirements of the fire service

Table 4.1-3 - Existing Allocations - Somer Valley

The table below summarise the potential supply of employment floorspace across existing allocations in Somer Valley. It sets out the potential developable area for each site, the capacity should they be redeveloped to different levels of intensity and the potential net uplift that could be achieved when recognising existing floorspace on site. A commentary is provided on the suitability of individual sites for employment use, drawing on the detailed appraisals set out in Appendix A.

Location	Gross Area (ha)	Net Developable Area (ha)	Existing floorspace (sqm)	Development scenarios & potential floorspace (sqm)	Net uplift (sqm)	Employment Typology	Suitability for Employment Development
Former Paulton Printworks SSV22	0.28	0.28	n/a	Low 840 Mid 1,400 High 2,100	Low 840 Mid 1,400 High 2,100	Mixed employment estate	Redevelop
Central High Street, Midsomer Norton (including Palladium and Brewery Sites) SSV1	0.38	0.38	1,857	Low 3,800 Mid 6,080 High 8,550	Low 3,800 Mid 6,080 High 8,550	Town centre office	Infill / expansion
Former Welton Manufacturing Site SSV4/LPPU	5.47	4.90	21,920	Low 14,433 Mid 19,244 High 26,460	Low -7,487 Mid -2,676 High 4,540	General industrial	Infill / expansion

Location	Gross Area (ha)	Net Developable Area (ha)	Existing floorspace (sqm)	Development scenarios & potential floorspace (sqm)	Net uplift (sqm)	Employment Typology	Suitability for Employment Development
Somer Valley Enterprise Zone SSV9	13.08	13.08	n/a	Low 39,240 Mid 65,400 High 98,100	Low 39,240 Mid 65,400 High 98,100	Mixed employment estate	Redevelop
Old Mills Industrial Estate Expansion SSV9	6.90	6.85	9,145	Low 20,543 Mid 27,391 High 37,662	Low 11,398 Mid 18,246 High 28,517	General industrial	Infill / expansion
Bath College Somer Valley Campus SSV18	4.82	4.82	13,531	Low 24,100 Mid 28,920 High 57,840	Low 10,569 Mid 15,389 High 44,309	R&D/ innovation	Infill / expansion

4.2. Proposed Employment Allocations

These sites are those that have been presented as newly proposed employment allocations. The proposed allocations comprise a number of sites in active employment use with the potential for expansion, as well as greenfield sites in broad locations with existing employment activity. The assessment considers their potential for uplift in employment floorspace in different development scenarios, taking account of locational factors and the implications of environmental, heritage and accessibility characteristics.

Major site allocations at North Radstock and East Radstock were initially considered (and are appraised in the accompanying appendix), however, these allocations are anticipated to be predominantly residential led, with any employment provision limited to small-scale, local provision. As such, their potential to make meaningful contributions to employment land supply has not been considered further through this assessment. The proposed North Keynsham allocation covers a substantial area and incorporates the existing allocation at Land East of Keynsham KE3A. Our capacity testing assumes that the wider North Keynsham allocation is predominantly residential, but that the parcel of land between the A4 and the railway remains a focus for additional employment provision (see Table 4.1.2). This provision would effectively be incorporated into the proposed North Keynsham allocation. As with the above Radstock allocations, there is the potential for some further incidental provision within a local centre. As such, while the North Keynsham allocation would make a valuable contribution to employment land supply, to avoid double counting floorspace, the relationship between the existing and proposed allocations is referenced below and regard should be had to the floorspace figures presented in Table 4.1.2

Nine proposed employment allocations are assessed as being suitable for some form of continued, expanded or new employment use. The sites below have been identified as having the potential to serve a variety of employment typologies and markets, including conventional office and mixed employment sites with a varied offer. For the larger scale and greenfield allocations, a mixed employment typology has typically been used as the basis of different development scenarios. This reflects the fact that sites could be suited for a range of uses, subject to the composition of the wider allocations. Major contributors to potential supply are identified at Bath Business Park and Westfield, where there are opportunities to expand the existing successful operations to adjoining land, increasing supply for a range of light industrial, industrial, warehousing and logistics operators.

Table 4.2-1 - Proposed Allocations across Bath & North east Somerset

The table below sets out the potential developable area for each of the newly proposed employment sites across the District, the capacity should they be redeveloped to different levels of intensity and the potential net uplift that could be achieved when recognising existing floorspace on site. A commentary is provided on the suitability of individual sites for employment use, drawing on the detailed appraisals set out in Appendix A.

Location	Gross Area (ha)	Net Developable Area (ha)	Existing floorspace (sqm)	Development scenarios & potential floorspace (sqm)	Net Uplift (sqm)	Employment Typology	Recommendation / Comments
Bath							
SW of Odd Down Park & Ride	7.5	6.97	0	Low 20,923 Mid 34,871 High 52,307	Low 20,923 Mid 34,871 High 52,307	Mixed employment estate	Redevelop Opportunity for new development adj. existing industrial use [a safeguarded waste site – “Former Fuller’s East Works”], subject to environmental considerations

Location	Gross Area (ha)	Net Developable Area (ha)	Existing floorspace (sqm)	Development scenarios & potential floorspace (sqm)	Net Uplift (sqm)	Employment Typology	Recommendation / Comments
Bristol to Bath Corridor							
North Keynsham	118.30	8.67	n/a	-	-	Light Industrial / SME workspace	Redevelop The proposed allocation incorporates “Land adj. East Keynsham KE3A” (see Table 4.1.2) and it is assumed that this area remains the focus for the provision of additional employment land as part of this broader allocation.

Location	Gross Area (ha)	Net Developable Area (ha)	Existing floorspace (sqm)	Development scenarios & potential floorspace (sqm)	Net Uplift (sqm)	Employment Typology	Recommendation / Comments
East Whitchurch Village	35.96	1.44	5,060	Low 4,315 Mid 6,473 High 8,630	Low -745 Mid 1,413 High 3,570	Light industrial / SME workspace	Redevelop Opportunity to incorporate modest local employment provision on this major residential-led allocation
Durley Farm	3.5	3.22	0	Low 9,660 Mid 16,100 High 24,150	Low 9,660 Mid 16,100 High 24,150	Mixed employment estate	Redevelop Redevelopment potential subject to Green Belt and environmental considerations
Devonport House	1.38	1.38	0	Low 4,140 Mid 6,900 High 10,350	Low 4,140 Mid 6,900 High 10,350	Mixed employment estate	Redevelop Redevelopment potential subject to Green Belt and environmental considerations

Location	Gross Area (ha)	Net Developable Area (ha)	Existing floorspace (sqm)	Development scenarios & potential floorspace (sqm)	Net Uplift (sqm)	Employment Typology	Recommendation / Comments
Ashton Way and the Labbott Car Parks	0.49	0.49	0	Low 4,900 Mid 7,840 High 11,025	Low 4,900 Mid 7,840 High 11,025	Town centre office	Redevelop Opportunity for local office provision in town centre location, though noting that capacity may be reduced in favour of mixed-use development
Somer Valley							
Land Adjacent to Bath Business Park	39.72	39.72	24,279	Low 119,160 Mid 198,600 High 297,900	Low 94,881 Mid 174,321 High 273,621	Mixed employment estate	Infill / expansion Substantial opportunity for varied employment provision on land adjoining existing business park

Location	Gross Area (ha)	Net Developable Area (ha)	Existing floorspace (sqm)	Development scenarios & potential floorspace (sqm)	Net Uplift (sqm)	Employment Typology	Recommendation / Comments
Westfield Industrial Estate	38.38	37.87	100.785	Low 113,597 Mid 189,328 High 283,993	Low 12,812 Mid 88,543 High 183,208	Mixed employment estate	Redevelop Potentially suitable for a variety of employment typologies, subject to appropriate infrastructure upgrades and environmental mitigation across the extended area.
Rural							
Box Road, Bathford	0.73	0.73	0	Low 2,190 Mid 3,285 High 4,380	Low 2,190 Mid 3,285 High 4,380	Light Industrial/ SME Workshops	Redevelop Potentially suitable for small-scale employment uses, subject to addressing environmental issues.

Location	Gross Area (ha)	Net Developable Area (ha)	Existing floorspace (sqm)	Development scenarios & potential floorspace (sqm)	Net Uplift (sqm)	Employment Typology	Recommendation / Comments
Extension to Westway Farm Rural Business Park, Bishop Sutton	1.50 ha	1.50 ha	1,470	Low 4,487 Mid 5,983 High 8,227	Low 3,017 Mid 4,513 High 6,757	Business Park Office	Redevelop Opportunity for expansion of existing uses adjacent to the site.

4.3. Existing Employment Sites

There are 31 existing employment sites across Bath & North East Somerset which have been identified and provided for assessment. They are not allocated sites within the existing Local Plan or proposed as new allocation in the emerging Local Plan. Of the 31 existing sites, 10 sites have been classified as being suitable for protection as a result of them either operating efficiently at site capacity or as a result of a particular constraint being identified that would likely prevent more intensive or expanded employment use. The remaining 21 sites would potentially offer some potential for infill or expansion over the plan period, but in many cases, it is unclear whether sites are available or whether infill/redevelopment would be practicable. These sites may offer some supply contingency over the plan period.

16 existing employment sites in Bath have been appraised. These sites include the Production Quarter (Brassmill, Locksbrook and Weston Island) and an array of smaller sites that are predominantly in light industrial use. Detailed appraisals are included in Appendix 1.

The principal site by size is the Riverside (Production Quarter), identified in this report as Brassmill / Locksbrook / Weston Island. The Production Quarter occupies a substantial 22 hectare area to the west of Bath City Centre, with direct access to a stretch of the River Avon, the strategic road network and a broad array of existing light industrial, industrial and R&D type uses. The mix of existing uses and the number of businesses present mean that it has a somewhat unique context and market offer in an area that sits on the periphery of Bath's commercial core. The area undoubtedly has the potential for an uplift in employment floorspace over the plan period, but the extent of existing provision and fragmented ownership mean that uplift is likely to be somewhat speculative and it is challenging to determine the precise contribution that the Quarter might make to overall supply. Work undertaken previously by Fielden Clegg Bradley in 2024 has set out that significant increases in floorspace could be theoretically achieved through infill and targeted redevelopment, and our scenario testing bears this out. However, change across the Quarter is likely to be incremental and coordination is required to address environmental and access issues if the Quarter is to achieve this potential in making a significant contribution to additional employment provision in the longer term.

A number of railway arch sites have been identified, providing valuable floorspace for small businesses. While such sites are important in diversifying available supply and can offer placemaking opportunities, the nature of the units means that they offer no opportunity for expansion or intensification.

Outside of Bath, Ashmead Road Estate has been identified as having some limited potential for additional floorspace, though the site is operating close to capacity in its current state. A similar review of Broadmead Lane Industrial Estate has led to a

recommendation that the site continue to be protected but opportunities for additional infill provision will be limited. Several existing industrial sites in the Somer Valley and in more have been appraised, including at Radstock and Midsomer Norton. These offer some limited potential for infill development, with the exception of a more sizeable opportunity at Midsomer Enterprise Park. In the majority of cases, the continued protection of these sites for employment use is likely to be the most practicable outcome.

There are seven existing employment sites in the rural areas appraised in this report. The seven existing employment sites have all been appraised as being potentially suitable or suitable for employment development. While these sites may be operating successfully at the present time, their rural locations tend to mean that accessibility and infrastructure provision is lacking relative to other broad employment locations and expansion can be challenging due to Green Belt and environmental issues.

4.4. Monitoring

The recommendation for ongoing monitoring of the employment land in Bath and North-East Somerset is the most tangible way of ensuring the supply of employment land aligns with the needs set for the local authority through the plan-making process. An annual review of employment land alongside the monitoring of housing supply allows for a greater understanding of the market drivers within the region and allows for consistency in the maintaining of a clear and strong evidence base for any proposals for development coming forward.

5. Supply and Demand overview

The site appraisals and capacity testing set out in this report provide a framework through which the supply of employment land can be understood across Bath and North east Somerset, for a range of employment sub-typologies and at the site level. Site appraisals provide a robust and consistent basis for understanding opportunities and constraints that will shape future redevelopment opportunities and provide clear recommendations as to the merits of continued or proposed employment use. A logical and consistent approach to determining indicative site capacities provides a platform from which more detailed site-specific intelligence can be leveraged and decisions around development intensity and form can be made.

The summaries below focus on employment floorspace that might be delivered through existing and proposed site allocations. The outputs of this report provide a means of ensuring informed decisions can be made around the sufficiency of employment land that the council propose to allocate, having regard to demands identified in B&NES Future Economic Needs Assessment and subsequent updates and addendums, with additional insight gained through engagement with agents.

5.1. Supply position

The sites subject to assessment through this study comprise a diverse range of sizes, locations and contexts and are collectively well suited to support a diverse economy and a variety of different employment typologies. However, the analysis highlights several areas where supply is likely to be more acute and this is heightened when considering the proportion of established sites with existing employment use and competition for other land uses, notably residential use.

27 sites are proposed as allocations to be carried forward from the existing Local Plan or are newly proposed. These sites comprise 143.7 hectares of land that are distributed across the District and identified as capable of supporting a variety of types of employment use. Of these allocations, 11 are located within the Bath sub area, 6 sites are in the Bristol to Bath Corridor, 8 sites in Somer Valley and 2 sites in Rural Areas. A number of existing employment sites have also been subject to appraisal to identify their suitability for continued or more intensive employment use, were they to become available for development. While they do not contribute to the supply figures noted below, a detailed summary of each site is provided in the accompanying appendix.

The net developable area of these sites has been calculated having regard to the environmental and planning constraints which may affect development potential. Plot ratios have been applied for different employment typologies to determine potential site capacities if sites were to be redeveloped with differing levels of intensity. While net developable areas do not consider the extent of build development already on site, existing floorspace figures have been derived and are presented in order to better reflect the potential net change in floorspace that might be achieved in different development scenarios. As such, these outputs provide an overview of potential

supply to inform plan-making and the direction of employment policies, rather than being bespoke, site-specific capacity studies.

Table 5.1.1 demonstrates the number of site allocations by employment typology, their potential capacity and uplift in floorspace when considering existing occupiers. Importantly, of the 27 site allocations that are presented below, 20 sites include existing buildings. In some instances, existing occupiers will be well established and likely to remain in situ through the plan period and in such cases the protection/retention of existing floorspace is the most likely outcome. However, in other cases, the capacity testing presents a range of floorspace outcomes that could be achieved.

The qualitative assessment set out in the appendices demonstrates that the majority of the sites that were identified would be suitable for new or expanded employment use, or potentially suitable subject to mitigation that could be achieved through the design development/planning process. In some cases, particularly for larger greenfield sites, it is expected that development will comprise a significant amount of new housing and other complementary uses and, as such, their potential to provide substantial employment floorspace will be constrained for this reason.

Consideration is given below to the key findings for different employment typologies.

The FENA 2025 highlighted a particular demand for new office space within Bath City Centre. The assessment identifies eleven sites primarily suited to **office use**, with a larger number of additional sites considered to be a more mixed employment typology that might include offices. Of these sites, seven are located in Bath City. Bath Quays North and South Quays and Riverside form key connected sites that have both secured increased employment provision through recent planning permissions. Their city centre location, river frontage and scale combine to provide an important placemaking opportunity that can stimulate demand for similar development in the vicinity. While other sites including Cattlemarket, Manvers Street and Green Park Station display a range of characteristics that make them well suited to continued and expanded employment use, a combination of existing occupiers and the presence of/proximity to heritage assets limit their potential to deliver significant uplift in office floorspace. Should the reconfiguration of sites be pursued or existing occupiers relocate, these sites would offer attractive locations for more intensive office growth. Sites in Midsomer Norton provide opportunities for the delivery of office floorspace in secondary locations through infill and intensification.

Bath College Somer Valley Campus is identified as the only allocation directly supporting **R&D and innovation** use, though there are a broader number of sites that would be well suited to supporting growth in this sector. While capacity for the Production Quarter (Brassmill Lane, Locksbrook Road Estate and The Maltings) has not been explicitly included in potential supply figures, the scale of this location and the potential for economic benefits associated with agglomeration mean that incremental change and intensification would make a valuable contribution to overall supply. Particular opportunities for R&D and innovation uses exist in close proximity to the University Campus and other light industrial uses, however, the fragmented

nature of land ownership across the site and the extent of existing site coverage and occupation mean that uplift in floorspace is likely to be a gradual process.

While no sites are explicitly identified as being best suited to **logistics and warehousing**, our assessment has identified 10 existing and proposed site allocations that would be best characterised as being suitable for **mixed employment estate** including E(g), B2 and B8 use classes. This typology has been used to attribute some flexibility to sites that have the potential to accommodate a range of employment types as a result of their existing provision and/or prevailing character and context. The expansion of Bath Business Park and Somer Valley Enterprise Zone are examples of existing and proposed allocations with the capacity to deliver significant uplifts in employment floorspace across a range of typologies. Sites in mixed employment estate category that have been identified as having strong access to the strategic road network would be good candidates for the expansion of logistics and warehousing operations, directly addressing the additional needs identified in the FENA. This could Bath Business Park, Somer Valley Enterprise Zone, Westfield Industrial Estate Expansion or Odd Down.

Three site allocations have been explicitly identified as being well suited to **light industrial / SME**. Box Road, Bathford provides an opportunity for small-scale provision to serve the local market, while the East Whitchurch and North Keynsham (Land adjacent to East Keynsham) sites provide opportunities to cluster additional light industrial space around existing provision, noting the ambitions for substantial housing delivery at and around these sites. A wider portfolio of existing light industrial sites were also considered in the assessment, ranging from railway arches and SME workspaces to larger business and trade parks. While many of these sites – particularly the smaller sites - offer little or no capacity for increased provision, some of the larger business and industrial parks across Somer Valley and in the Bristol to Bath Corridor may provide some opportunity for infill development or uplift through redevelopment as premises reach the end of their productive life through the plan period. Two site allocations have been identified as having an existing character that would support **general industrial** use. The opportunities for uplift in floorspace across these sites via infill, redevelopment or expansion has been modelled as being between 35,000 and 64,000sqm. The assessment considered a number of other existing industrial sites in the Somer Valley and Rural Areas and found that opportunities for significant increases in floorspace are limited as a result of the extent of existing site coverage. However, infill and/or redevelopment at sites including Midsomer Enterprise Park, Mill Road or Farrington Fields could make valuable contributions to industrial land supply over the plan period. In the case of industrial and light industrial floorspace, it is anticipated that additional provision will be delivered across the more numerous Mixed Employment Estates where such uses would be compatible with the character and operation of these sites.

5.1.1. Supply by employment typology

A table that summarises the potential supply across recognised employment typologies. The summary below presents the number of existing and proposed site allocations falling within each typology, their net developable area having considered the impact of planning and environmental constraints and their potential collective capacity were they to be developed to differing levels of intensity. It is not necessarily assumed that each individual site would have the same magnitude of development potential; this being affected by their location, context and site-specific factors. The table acknowledges the existing floorspace that exists across these sites and the net uplift that might be achieved in the event that sites are redeveloped to give a more realistic picture of their potential contribution to meeting identified demand for additional employment floorspace.

Table 5.1.1-1 - Potential supply of employment floorspace across different employment typologies

Employment Typology	No. of Sites	Net Developable Area (ha)	Floorspace low (sqm)	Floorspace mid (sqm)	Floorspace high (sqm)	Existing Floorspace (sqm)	Net uplift – low (sqm)	Net uplift – mid (sqm)	Net uplift -high (sqm)
Town Centre Office E(g)(i)	9	9.12	91,197	145,916	205,194	75,234	15,963	70,682	129,960
Business Park Offices E(g)(i)	2	1.99	5,953	7,937	10,914	4,277	3,017	4,513	6,757
R&D/ Innovation E(g)(i)	1	4.82	24,100	28,920	57,840	13,531	10,569	15,389	44,309
Light industrial/ SME	3	10.84	32,515	48,773	65,030	17,044	15,471	31,729	47,986

Employment Typology	No. of Sites	Net Developable Area (ha)	Floorspace low (sqm)	Floorspace mid (sqm)	Floorspace high (sqm)	Existing Floorspace (sqm)	Net uplift – low (sqm)	Net uplift – mid (sqm)	Net uplift -high (sqm)
workspace E(g)(i)									
General Industrial B2*	2	11.66	34,976	46,634	64,122	31,065	3,911	15,569	33,057
Mixed Employment estate E(g)/B2/B8	10	104.27	312,801	521,335	782,002	139,936	178,374	385,614	644,663
TOTAL	27	142.70	501,542	799,515	1,185,102	281,087	227,305	523,496	906,732

Source: AtkinsRéalis analysis

**The analysis considers and amalgamates two separate sites at both Old Mills Industrial Estate*

5.1.2. Supply by allocation type

The table below shows the potential floorspace that could be delivered across the **existing site allocations**. Our assessment considers the potential for 18x existing employment allocations to contribute to the continued and increased provision of employment floorspace. These sites comprise 12x existing employment sites identified as having potential for infill or expansion, 4x greenfield sites with development potential and 2x sites considered to be operating at capacity and for which the protection of the existing use is the most practicable policy response.

Table 5.1.2-1 - Potential supply of employment floorspace across existing site allocations

Employment Typology	No. of Sites	Net Developable Area (ha)	Floorspace low (sqm)	Floorspace mid (sqm)	Floorspace high (sqm)	Existing Floorspace (sqm)	Net uplift – low (sqm)	Net uplift – mid (sqm)	Net uplift –high (sqm)
Town Centre Office E(g)(i)	8	8.63	86,297	138,076	194,169	75,234	11,063	62,842	118,935
Business Park Offices E(g)(i)	1	0.49	1,466	1,954	2,687	2,807	-	-	-
R&D/ Innovation E(g)(i)	1	4.82	24,100	28,920	57,840	13,531	10,569	15,389	44,309
Light industrial/ SME workspace E(g)(i)	1	8.67	26,010	39,015	52,020	11,984	14,026	27,031	40,036

General Industrial B2	2	11.66	34,976	46,634	64,122	31,065	3,911	15,569	33,057
Mixed Employment estate E(g)/B2/B8	5	15.11	45,321	75,535	113,303	8,448	42,382	71,302	107,452
Total	18	49.37	218,170	330,135	484,141	143,069	81,951	192,133	343,789

Source: AtkinsRéalis analysis

The table below shows the potential floorspace that could be delivered across the **proposed site allocations**. Our assessment considers the potential provision of additional employment floorspace across 9x proposed employment allocations. These sites are distributed across the District and are typically greenfield sites or represent the opportunity to expand existing employment locations. In the case of Bath Business Park, the site tested includes the existing business park and the two plots of land either side.

Table 5.1.2-2 - Potential supply of employment floorspace across proposed employment site allocations

Employment Typology	No. of Sites	Net Developable Area (ha)	Floorspace low (sqm)	Floorspace mid (sqm)	Floorspace high (sqm)	Existing Floorspace (sqm)	Net uplift – low (sqm)	Net uplift – mid (sqm)	Net uplift –high (sqm)
Town Centre Office E(g)(i)	1	0.49	4,900	7,840	11,025	-	4,900	7,840	11,025

Employment Typology	No. of Sites	Net Developable Area (ha)	Floorspace low (sqm)	Floorspace mid (sqm)	Floorspace high (sqm)	Existing Floorspace (sqm)	Net uplift – low (sqm)	Net uplift – mid (sqm)	Net uplift –high (sqm)
Business Park Office E(g)(i)	1	1.50	4,487	5,983	8,227	1,470	3,017	4,513	6,757
Light Industrial/ SME workspace E(g)(i)	2	2.17	6,505	9,758	13,010	5,060	1,445	4,698	7,950
Mixed employment estate E(g)/B2/B8	5	89.16	267,480	445,800	668,699	131,488	135,992	314,312	537,211
Total	9	93.32	283,372	469,381	700,962	130,018	145,354	331,363	562,944

Source: AtkinsRéalis analysis

5.1.3. Supply across the different sub-areas

Bath Summary

In Bath, 11 sites have been assessed: 10 Existing Allocations and 1 Proposed Allocation. Sites in Bath are primarily identified as being suitable for conventional town centre office provision and, as the core office location in the District, it is particularly important that opportunities are taken to increase supply across these sites and other windfalls that might become available. Nine of the eleven allocations tested were identified as having some capacity for uplift and intensification of existing employment provision. A further 16 existing sites were subject to detailed appraisal and may offer some opportunity for more limited infill, however for more than half of these sites the recommendation is that the current floorspace be protected on the basis that they are operating at capacity.

Table 5.1.3-1 - Potential floorspace to be delivered across employment allocations in Bath

Employment Typology	Site Assessed	Net Developable Area (ha)	Floorspace low (sqm)	Floorspace mid (sqm)	Floorspace high (sqm)	Existing Floorspace (sqm)	Net uplift – low (sqm)	Net uplift – mid (sqm)	Net uplift – high (sqm)
Town Centre Office E(g)(i)	6	8.17	81,697	130,716	183,819	73,114	8,583	57,602	110,705
Business Park Offices E(g)(i)	1*	0.49	1,466	1,954	2,687	2,807	-	-	-
Mixed Employment	4*	8.71	26,164	43,607	65,410	14,872	16,801	32,949	53,134

estate E(g)/B2/B8									
Total	11	17.38	109,327	176,276	251,916	90,793	25,384	90,551	163,839

Source: AtkinsRéalis analysis

Bristol to Bath Corridor Summary

In the Bristol to Bath Corridor, 6 allocations have been tested: 2 Existing Allocations and 4 Proposed Allocations. Land East of Keynsham (which forms part of the North Keynsham Allocation) is identified as the most significant contributor to potential supply and best suited to light industrial type uses given the location and adjacency to the existing recycling centre and similar operators further west along Bath Road. Keynsham Town Centre Car Parks (Ashton Way and the Labbott Car Parks) provide an opportunity for local office provision in an accessible location, though it is acknowledged that this site may also be subject to pressures for residential development on upper floors and this may limit capacity. Durley Farm and Devonport House both represent attractive opportunities for employment development in close proximity to the strategic road network, notwithstanding their location in the Green Belt and wider environmental issues. Potentially some infill potential at Ashmead Industrial Estate, but likely to be incremental given extent of existing site coverage. A further three existing (but unallocated) sites have been appraised, but are likely to have only limited potential to contribute to the provision of employment floorspace in the plan period.

Table 5.1.3-2 - Potential floorspace to be delivered across employment allocations in the Bristol to Bath Corridor

Employment Typology	Site Assessed	Net Developable Area (ha)	Floorspace low (sqm)	Floorspace mid (sqm)	Floorspace high (sqm)	Existing Floorspace (sqm)	Net uplift – low (sqm)	Net uplift – mid (sqm)	Net uplift – high (sqm)
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Town Centre Office E(g)(i)	2	0.57	5,700	9,120	12,825	263	5,437	8,857	12,562
Light industrial/ SME workspace E(g)(i)	2	10.11	30,325	45,488	60,650	17,044	13,281	28,444	43,606
Mixed Employment estate E(g)/B2/B8	2	4.60	13,800	23,000	34,500	-	13,800	23,000	34,500
Total	6	15.28	49,825	77,608	107,975	17,307	32,518	60,301	90,668

Source: AtkinsRéalis analysis

Somer Valley Summary

Eight allocations have been assessed in the Somer Valley: 6 existing allocations and 2 proposed allocations. All sites have been identified as having the potential to make meaningful contributions to employment land supply, particularly in mixed employment and industrial typologies. Bath Business Park and Westfield Industrial Estate expansions form the majority of potential supply. To a lesser extent, opportunities exist to expand the provision of general industrial uses at the Former Welton Manufacturing site and the Old Mills Industrial Estate extension.

Table 5.1.3-3 - Potential floorspace to be delivered across employment allocations in the Somer Valley

Employment Typology	Site Assessed	Net Developable Area (ha)	Floorspace low (sqm)	Floorspace mid (sqm)	Floorspace high (sqm)	Existing Floorspace (sqm)	Net uplift – low (sqm)	Net uplift – mid (sqm)	Net uplift – high (sqm)
Town Centre Office E(g)(i)	1	0.38	3,800	6,080	8,550	1,857	1,943	4,223	6,693
R&D / Innovation E(g)(i)	1	4.82	24,100	28,920	57,840	13,531	10,569	15,389	44,309
Mixed Employment estate E(g)/B2/B8	4	90.95	272,837	454,728	682,093	125,064	147,773	329,664	557,029
General Industrial (B2)	2	11.66	34,976	46,634	64,122	31,065	3,911	15,569	33,057
Total	8	107.81	335,713	536,362	812,605	171,517	164,196	364,845	641,088

Source: AtkinsRéalis analysis

Rural Areas Summary

Two proposed allocations have been assessed in the Rural Areas sub area: Box Road, Bathford and the extension to Westway Farm Rural Business Park. Both sites offer opportunities for uplift in employment floorspace subject to consideration of Green Belt impact and environmental mitigations. A further seven existing employment sites were appraised across the rural areas, all of which might offer some limited opportunity for infill over the plan period – though the nature of industrial uses across several of these sites

means that higher demands for HGV access, circulation and open storage will limit the potential for uplift in functional employment floorspace.

Table 5.1.3-4 - Potential floorspace to be delivered across employment allocations in the Rural Areas

Employment Typology	Site Assessed	Net Developable Area (ha)	Floorspace low (sqm)	Floorspace mid (sqm)	Floorspace high (sqm)	Existing Floorspace (sqm)	Net uplift – low (sqm)	Net uplift – mid (sqm)	Net uplift – high (sqm)
Business Park Office E(g)(i)	1	1.50	4,487	5,983	8,227	1,470	3,017	4,513	6,757
Light industrial / SME	1	0.73	2,190	3,285	4,380	-	2,190	3,285	4,380
Total	2	2.23	6,677	9,268	12,607	1,470	5,207	7,798	11,137

Source: AtkinsRéalis analysis

5.2. Demand Position

The West of England Employment Land Spatial Needs Assessment (ELSNA) March 2023 set out the demand for the West of England region, including B&NES. The purpose of the study was to assess employment land demand and supply characteristics and provide recommendations around land supply required across the sub-region in different demand scenarios. The report considered employment space requirement by use class across the region with modelling and scenario testing undertaken by Oxford Economics. Forecasts projected a need for additional employment floorspace (sqm) totalling 48,000 sqm in the limited period between 2019 and 2024. The majority of this demand was identified as being for office and R&D floorspace. B&NES Employment Growth and Employment Land Review (March 2020) estimated additional demand of 100,000 sqm for office and 120,000-200,000 sqm for industrial and warehousing over the period 2016-36.

The B&NES Future Economic Needs Assessment Update May 2025¹¹ sets out the anticipated employment need for the plan period 2025 – 2043. The FENA report sets out that the need for offices is concentrated in Bath City, and industrial and warehousing more evenly spread, with Somer Valley having notable industrial requirements. The floorspace requirements for different employment uses are presented as additional floorspace in comparison with this report which shows the overall floorspace capacity across Bath and North east Somerset.

The Addendum Report¹² completed in August 2026 sets out the employment sites and floorspace requirements for Offices, Industrial and Warehousing & Logistics to sustain job creation and growth over the plan period. Specifically, the Addendum Report considers the impact of a significant increase in the level of housing to be delivered over this period. It estimates a need for an additional 22,000 jobs in the period up to 2043, with around 65% of these jobs estimated to be located in Bath. As with the earlier FENA, the Addendum report presents scenarios using forecasts prepared by Oxford Economics and Cambridge Econometrics. The report identifies an overall requirement over the plan period as a range, as follows:

Offices: 94,000 – 96,000sqm (11.8 – 12 hectares). Of this, it is estimated that c70,000sqm of office floorspace is required in the Bath City sub-area.

Industrial: 63,000 – 74,000sqm (15.7 – 18.5 hectares). Need is identified across all sub areas, but c50% of the overall requirement is identified as being required in the Rural Areas sub area.

¹¹ HJA (May 2025) B&NES Future Economic Needs Assessment Update

¹² HJA (August 2026) FENA Addendum Report

Warehousing & Logistics: 73,000sqm (14.6 hectares). Need for sites suitable for the expansion of warehousing and logistics is identified across all sub areas

6. Conclusion

This assessment provides an overview of the potential capacity of employment allocations if they were to be redeveloped to differing levels of intensity. These sites are well distributed across the District and have been identified as suited to a number of employment typologies according to their prevailing character, context or the nature of the future opportunity.

The assessment suggests that there is sufficient overall supply of employment land to accommodate the need identified in the FENA and its addendum report across medium and high growth scenarios, but more nuanced consideration of the assessment findings presents a more constrained picture in certain locations and across individual employment typologies. This is largely a result of several factors:

- The majority of sites assessed have existing occupiers and the implications of this will vary between sites. In a number of cases, there would be legitimate opportunities for infill and/or intensification through redevelopment, but in others, the most likely outcome might be the retention and protection of the existing employment use. Several sites were modelled as having a net reduction in employment floorspace through the scenario testing – particularly in the light industrial and general industrial typologies – and this reflects a large degree of existing site coverage and limited prospect of further expansion.
- A small number of large greenfield sites have been identified as having the potential to provide significant quantum of employment floorspace, particularly around Keynsham and Radstock. While it is possible that these sites could make significant contributions to new employment floorspace, comparative demands to deliver substantial number of new homes means that such sites offer only a limited prospect of delivering major increases in employment floorspace. As a result, sites at North and East Radstock do not figure in our assumptions around future supply and at North Keynsham assumptions around future supply are focused on Land at East Keynsham, noting that this is to be incorporated into the larger allocation.
- Significant areas of the District are subject to environmental, highways and/or heritage constraints that will in all likelihood further limit the extent to which the high growth figures can be achieved on a number of sites. Understanding the potential supply of individual sites and which of the low, medium or high growth scenarios are most feasible would be the subject of further study.
- While the overall supply figures are generous in some typologies, particularly in the higher growth scenario, certain locations are better suited to different employment markets. Though there is some inherent flexibility, not all sites are interchangeable, and the assessment reveals a modest number of sites in certain typologies and this adds to the relative importance of individual sites and locations in supporting economic growth across B&NES.

The supply of sites principally suited for town centre office use remains challenging. Allocations would need to be developed in excess of the medium capacity scenarios

in order to meet the need identified in the FENA Addendum and heritage constraints may be a limiting factor across central Bath. Delivering sufficient capacity to meet need for additional offices will therefore require sites in Bath in particular to be optimised through their development and supported by additional provision on mixed employment sites and in other broad locations to provide a more local offer.

Similarly, a limited number of sites have been identified as having significant capacity for the expansion of general industry and logistics and warehousing uses. Existing industrial sites tend to have high levels of existing floorspace, limiting the immediate opportunity for Infill / expansion and the nature of these sites means that redevelopment of existing premises is unlikely to yield significant uplifts. The expansion of existing business and industrial parks that have high levels of occupancy and market demand will be important in meeting these needs and the sites identified as best suited to mixed employment will play a critical role in meeting these needs. More ad-hoc infill development across existing sites that are not allocated may also make important contributions to the overall supply of general industrial space.

Mixed employment locations dominate the overall supply picture and include sites that will provide the opportunities for substantial provision, including Bath Business Park, Westfield Industrial Estate, Somer Valley Enterprise Zone and Odd Down. These sites provide flexibility to address need across a range of typologies and it is important that allocations aren't so prescriptive that they preclude a flexible approach that can respond to market conditions and the phasing and delivery of other employment sites.

Beyond the allocated employment sites, a range of existing sites have been appraised through this assessment to consider their potential for continued and/or more intensive employment use through the plan period. Amongst these sites, the Production Quarter provides a unique opportunity to support the expansion of R&D and light industrial uses at scale within Bath. While there are significant levels of existing floorspace, opportunities for infill and intensification will allow for an uplift in employment provision and the consolidation of the Quarter as a key contributor to the local economy.

A large proportion of the existing sites tested within the assessment were identified as being in light industrial use and suited for SME occupiers across a range of small-scale sites, including railway arches. Many of these sites offer very little potential for increased provision, but they make a valuable contribution to the diversity of employment sites that is required to support a multi-faceted economy. Their continued protection from alternative forms of development will be an important part of delivering sustainable economic growth through the plan period.

The development scenarios adopted for this assessment provide a consistent and comparable methodology that accounts for environmental and planning constraints, but it does not set out bespoke site assessments that would naturally be developed as proposals emerge. The range of figures provided allows for local understanding and nuance to be applied to inform the most likely outcomes for individual sites. The qualitative site appraisals demonstrate that the vast majority of sites are well suited to employment use and in other cases, subject to mitigation being secured, sites can make a valuable contribution to supply. A range of high-quality sites have been identified across Bath, Bristol to Bath Corridor, Somer Valley and Rural Areas, though accessibility is a limiting factor in the attractiveness of some of the more rural sites.

Notwithstanding the need to consider the needs of different employment sub-markets and locations, this provides some flexibility in determining which sites should be protected and those which should be identified and prioritised for the provision of additional employment generating floorspace through the plan period.

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