

## **Land at Scotland Farm**

**Review of Employment Land Needs Evidence  
Greater Cambridgeshire**

**Prepared on behalf of Dry Drayton Estate Ltd and  
Hallam Land Management Ltd**





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## 1. INTRODUCTION

- 1.1 This Statement has been prepared by Marrons Planning national socio-economic team on behalf of Dry Drayton Estate Limited and Hallam Land Management Limited. The Report responds to the public consultation of the Greater Cambridgeshire Local Plan – First Proposals.
- 1.2 The focus of this Statement relates to both the overall level of employment land proposed and the suitability of our client’s site at Scotland Farm to help meet that need.
- 1.3 In undertaking a review of published evidence the Statement will seek to establish whether the assumptions used are robust and the Draft Local Plan seeks to fully acknowledge and address identified need.
- 1.4 In addition the Statement will assess the suitability of Scotland Farm as a location for employment development, given its association with existing businesses, the scale of development proposed and related employment benefits, and the access to local labour supply.



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## 2. THE EMPLOMENT LAND NEEDS EVIDENCE BASE

2.1 This section of the Statement reviews the existing local economic policy and associated evidence in the context of National planning policy requirements.

2.2 The National Planning Policy Framework (NPPF) (July 2021) requires that the preparation and implementation of plans and the application of policies in the framework deliver against its three sustainability objectives (economic, social and environmental). The economic objective of the NPPF is:

*“to help build a strong, responsive and competitive economy, by ensuring that sufficient land of the right types is available in the right places and at the right time to support growth, innovation and improved productivity and by identifying and coordinating the provision of infrastructure;”*

2.3 In ‘building a strong, competitive economy’, Section 6 requires that account is taken of local business needs and wider opportunities for development. Policies should set out a clear economic vision and strategy which positively and proactively encourages sustainable economic growth, having regard to Local Industrial Strategies and other local policies for economic development and regeneration. Critically paragraph 82 requires that recognition should also be given to addressing specific locational requirements of different sectors within planning policies, including:

*“making provision for clusters or networks of knowledge and data-driven, creative or high technology industries; and for storage and distribution operations at a variety of scales and in suitably accessible locations.”*



- 2.4 Government national planning practice guidance requires local authorities to prepare a robust evidence base to understand existing business needs, which encompass functional market areas, and for Local Enterprise Partnerships to play a key role in this process. The guidance requires that in gathering evidence to plan for business uses, local authorities will need to liaise closely with the business community, take account of the Local Industrial Strategy and understand current and future requirements.
- 2.5 In assessing business needs the guidance confirms assessment of the following:
- Best fit functional economic area;
  - Existing stock of land for employment uses within the area;
  - Recent pattern of employment land supply and loss;
  - Evidence of market demand;
  - Wider market signals; and any evidence of market failure
- 2.6 More specifically, the guidance also confirms the critical role the logistics industry plays *“in enabling an efficient, sustainable, and effective supply of goods for consumers and businesses, as well as contributing to local employment opportunities”*, something that has been brought into sharp focus during the COVID-19 pandemic. Importantly, the guidance also recognises that the logistics industry *“has distinct locational requirements that need to be considered in formulating planning policies (separately from those relating to general industrial uses).”*
- 2.7 The guidance confirms that strategic logistics facilities with a national or regional remit are likely to require significant amounts of land, good access to strategic transport networks, sufficient power capacity and access to appropriately skilled local labour. Policy-making authorities are encouraged to engage with logistics developers and occupiers to



understand the changing nature of requirements in terms of the type, size and location of facilities, including the impact of new and emerging technologies.

- 2.8 Local authorities are also required to assess the extent to which land and policy support is required for other forms of logistics requirements, including 'last mile' facilities serving local markets.

**a. Draft Local Plan – First Proposals**

- 2.9 The Draft Local Plan – First Proposals, encompasses the local authorities of Cambridge City and South Cambridgeshire District Councils, and seeks to provide for +58,500 jobs, 2020 – 2041, alongside +44,400 homes (2,111 dpa).

- 2.10 The Draft Local Plan confirms that of these 58,500 jobs, some 20,000 will be in traditional B Class uses (i.e. offices and industrial) and that this equates to a floorspace of 416,400 sq m. The Local Plan also notes in respect of the Greater Cambridge Employment Land Review and Economic Development Evidence Base (2020) (hereafter referred to as 'ELR'), that:

*“it recommends to ensure a flexible employment land supply for office and industrial jobs, and encouraging growth in existing businesses and attracting inward investment”*

- 2.11 The Draft Local Plan considers that over 600,000 sq m of employment floorspace has been identified, albeit it notes that this includes some large employment sites, such as the Genome Campus (150,000 sq m) that are expected to continue to be built out well beyond the new plan period. The Draft Local Plan confirms that it is planning for a greater amount of employment floorspace than that associated with the identified need, taking into account the needs of specific employment sectors.



- 2.12 The Draft Local Plan goes on to consider the needs of economic clusters, including life sciences, advanced manufacturing and ICT.
- 2.13 In respect of new employment development, the Draft Local Plan states that large scale national and regional warehousing and distribution centres will not be supported in Greater Cambridgeshire. It rationalises this statement due to the very high land take of this type of use, the local pressures on land supply for a range of uses, and the setting of Greater Cambridgeshire in the greenbelt. Of course regardless of how the Local Plan seeks to deal with large scale B8 warehousing, that demand exists and is ever growing. To not plan appropriately for it risks placing increased and unintended pressure on existing / planned employment floorspace. Furthermore, and despite growing demand nationally, there appears to be no consideration of data centres, which tend to compete for B8 floorspace.

**b. Greater Cambridge Employment Land and Economic Development Evidence Study (November 2020)**

- 2.14 The ELR summarises the commercial property market within Greater Cambridgeshire confirming in respect of offices that 60% of all office floorspace is located within South Cambridgeshire, with the remaining 40% in Cambridge. It also confirms that Greater Cambridgeshire has experienced a 41% increase in office floorspace over the past 17 years, however this figure disguises a disparity in growth patterns with South Cambridge experiencing a 107% increase over this period and Cambridge a 2% decline. Within the submarket of South Cambridgeshire there is considered to be a notional supply of office floorspace totalling 3 years.
- 2.15 In respect of industrial floorspace, the ELR confirms that 79% of industrial floorspace is located within South Cambridgeshire, with only 21% in Cambridge. It also confirms that compared to office stock, Greater Cambridgeshire has a lower quantum of overall floorspace when



compared to surrounding local authorities. Over the past 17 years, industrial floorspace has grown by 5% across Greater Cambridgeshire, with South Cambridgeshire experiencing 23% growth and Cambridge 33% decline. Within the submarket of South Cambridgeshire, there is a notional supply of approximately 3.5 years, however the ELR questions the appropriateness of the available floorspace in meeting future need.

- 2.16 The ELR concludes that for both office and industrial floorspace there is a trend to cluster in the City as well as along key transport corridors and hubs in South Cambridgeshire. In respect of Research and Development (R&D) deals, these are almost exclusively transacted in parks with a clustering of R&D. The ELR also confirms that there is a high supply pressure for R&D, with South Cambridgeshire having only a notional supply of 1 year, with no advertised floorspace elsewhere within Greater Cambridgeshire.
- 2.17 The ELR goes on to consider the challenges and opportunities faced by different sectors and clusters including life sciences, ICT and professional services, advanced manufacturing and agri-tech. The ELR confirms in respect of agri-tech that the relevant sub-sectors with a strong presence in Greater Cambridge include the growing of seeds, grains, plant breeding, agriculture and horticulture, agrochemicals, food processing and research centres, and therefore encompasses a broad range of businesses.
- 2.18 The Employment Land Review 2020 (ELR) considers there to be a total of 624,301 sq m of employment land supply within Greater Cambridgeshire, of which 443,987 sq m exists within South Cambridgeshire and 180,322 sq m in Cambridge. The figure for South Cambridgeshire includes 150,000 sq m at the expanded Genome Campus, which at the time of preparing the ELR had a resolution to grant permission.
- 2.19 Of the above figures, only 25,863 sq m of floorspace has detailed planning permission, and is under construction, with a further 113,965 sq





m having detailed planning permission. A further 219,989 sq m had outline planning permission at the time of the ELR. Of the remaining floorspace, 114,494 sq m relates to local plan allocations, with the remaining 150,000 sq m relating to the Genome Campus expansion. The supply figure also includes a loss of 76,032 of B2 (general industrial) floorspace, with the greatest loss in South Cambridgeshire.

2.20 In assessing future employment growth, the ELR establishes a series of employment growth scenarios ranging from a baseline East of England Forecasting Model scenario of +40,100 jobs, to +125,200 based upon past annual average job change. Included within the scenarios is a forecast based upon the job growth set out within the Cambridge & Peterborough Independent Economic Review (2018) (CPIER) which results in job growth of 92,100. However, the ELR appears to dismiss these higher growth scenarios, instead opting to test the implications of two labour demand scenarios (Central and High Growth KS2/KS3).

**Table 1 Summary of employment forecasts – Greater Cambridgeshire (2020 – 2041)**

Forecast	2020 – 2041 Change
EEFM/ CE forecast baseline	40,100
Standard Method	45,761
CPIER Proxy	92,100
2001 – 2017 annual average	55,300
2011 – 2017 annual average	125,200
Central growth (KS2)	58,400
Higher growth (KS3)	78,700

Source: Table 10, ELR 2020

2.21 Notwithstanding the restrictive nature of the jobs forecast used in determining floorspace demand, the ELR goes on to test the implications on floorspace demand by testing a series of scenarios, the first two of which test the central and higher growth (KS2/KS3) labour driven growth scenarios referred to above. The ELR also tests past net completions over



a shorter and longer term, with net completions over the shorter term projected to generate the greatest level of floorspace demand. A labour supply scenario, based upon the population projected through the standard method (to calculating housing need) was also tested, but leads to a lower level of floorspace demand. We provide an extract in the table below.

**Table 2 Summary of Scenario Floorspace Requirements sq m (extract)**

Use Class	Labour demand scenario Higher (KS3)	Labour demand scenario central (KS2)	Net completions 03-18 data	Net completions 12-18 data
B1			29,925	37,968
B1a	103,221	80,362	104,328	223,272
B1b	477,902	375,497	306,516	288,099
B1c	-20,471	-20,471	-20,601	-399
B2	-50,969	-50,969	-46,431	-25,074
B8	31,973	31,973	53,571	43,659
<b>Total</b>	<b>541,656</b>	<b>416,392</b>	<b>427,308</b>	<b>567,525</b>

Source: Table 38, ELR 2020

2.22 The following table summarises the recommended floorspace requirements recommended within the ELR.

2.23 In respect of logistics, we note that paragraph 6.38 of the ELR states that *'if losses in the city are stemmed, which is expected not only from a policy perspective but as there are limited industrial sites available for redevelopment, the future need in Sough Cambridgeshire would be closer to the Greater Cambridge net position (43,659 sq m)'*. Yet we note in the preceding paragraph, 6.37, of the ELR that it notes in respect of logistics that *'...losses have increased in Cambridge and are likely to continue, it is recommended that the recent net trends are planned for.'* The two statements are contradictory, and it is not clear whether the ELR considers that the loss of B8 floorspace will continue in Cambridge City or not. Notwithstanding, we consider it prudent for the Councils to plan on



the basis of the full identified need for B8 floorspace in South Cambridgeshire (i.e. 93,849 sq m).

**Table 3 ELR Recommended Floorspace Requirements sq m**

Use Class	Cambridge	South Cambridgeshire	Greater Cambridgeshire	Source
B1a	38,491	64,730	103,221	Labour demand scenario Higher
B1b	88,852	389,050	477,902	Labour demand scenario Higher
B1c	-16,905	16,506	-399*	Net completions 12-18 data
B2	-7,287	-17,787	-25,074	Net completions 12-18 data
B8	-50,190	93,849	43,659	Net completions 12-18 data
<b>Total</b>	<b>52,961</b>	<b>546,348</b>	<b>599,309</b>	

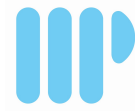
Source: Table 39, ELR 2020. Note: \* ELR notes reflects net position but planning for growth in SC is recommended.

2.24 The following table summarises the balance of the supply demand exercise undertaken within the ELR concluding upon a need for 9,843 sq m of B1a floorspace, 236,000 sq m of B1b floorspace, B1c 1,512 sq m of B1c, 50,958 sq m of B2 floorspace and 24,471 sq m of B8 floorspace. Given our comments above in respect of the recommended requirement for B8 offset by a fall in demand in Cambridge City, the surplus need which exists in South Cambridgeshire in isolation totals 72,495 sq m.

**Table 4: ELR Demand Supply by Use Class, Greater Cambridge (sqm) 2020-2041**

Use Class	Need	Incl. vacancy margin 7.5%	Supply	Balance	Comment
B1	-	-	283,708	283,708	Include 150,000 Genome Campus
B1a	103,221	110,963	101,120	-9,843	-
B1b	477,902	513,745	276,823	-236,922	Genome Campus likely to include high B1b element
B1c	16,506	17,744	16,232	-1,512	Need reflects positive approach for South Cambs
B2	-25,074	-25,074	-76,032	-50,958	-
B8	43,659	46,933	22,462	-24,471	Shortfall identified
<b>Total</b>	<b>616,214</b>	<b>664,311</b>	<b>624,313</b>	<b>-39,998</b>	-

Source: Table 40, ELR 2020.



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- 2.25 As detailed above however, no account has been taken of the appropriateness of existing stock to meet future needs, and no allowance appears to be made within the ELR for replacement stock, which would further increase the need for employment floorspace. Furthermore, it would appear that the ELR omitted to consider the growth in data centre demand, typically a B8 use, which would further increase pressure on the commercial property market, and would compete for B8 floorspace with logistics occupiers.
- 2.26 As acknowledged in the Draft Local Plan the supply figures incorporate some large sites which will be built out well beyond the plan period, as such the identified unmet need within the plan period is potentially far greater than identified above.



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### 3. LAND AT SCOTLAND FARM

- 3.1 Our client's site at Scotland Farm, located at Scotland Road and the A428, and lies adjacent to the planned Scotland Farm Park and Ride development being pursued as part of the Greater Cambridge Partnership's Cambourne to Cambridge scheme, and within close proximity to Bourn Airfield to the south of the A428.
- 3.2 Scotland Farm is owned by Dry Drayton Estate Limited, a family owned and run agricultural business. Dry Drayton Estate Limited are landowners of Scotland Farm, and as well as farming the land, provide farm management, agricultural contracting, grain storage and grain haulage services to other farms, land owners and merchants in the area.
- 3.3 Dry Drayton Estate Limited's business has grown substantially over the years, using innovative farming methods to reduce environmental impact and improve yields for its customers. Dry Drayton Estate Limited also own and let a number of residential and commercial properties on Scotland Farm.
- 3.4 The illustrative masterplan prepared by Dry Drayton Estate Limited and Hallam Land Management proposes a mix of employment uses on the site providing a maximum floorspace, as follows:
- B1/offices: approximately 28,300 sq m
  - Mid-tech/workshop/smaller industrial and mixed units: approximately 61,000 sq m
  - B8 logistics and larger footprint units: approximately 55,000 sq m
- 3.5 The indicative mix of employment floorspace will assist in meeting the unmet need identified above, as well as potentially assisting in the growth of the agri-tech sector across Greater Cambridgeshire.



3.6 We note that the Draft Local Plan confirms that:

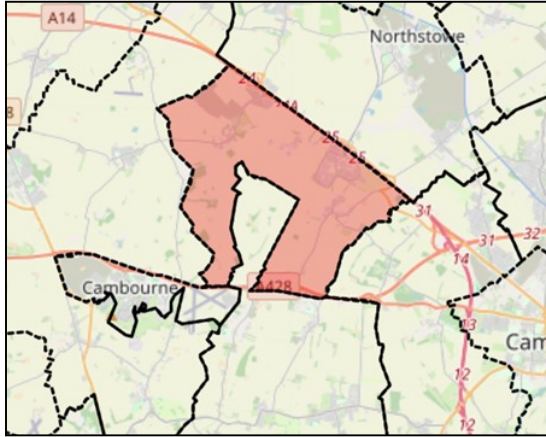
*“the most sustainable location for strategic scale development away from Cambridge is to expand on existing development in the Cambourne area, taking advantage of the significant benefits that will be provided by the proposed East West Rail station as well as the improvements already anticipated from the Greater Cambridge Partnership’s Cambourne to Cambridge scheme. This significant improvement in public transport provides an opportunity to grow an existing new town, enhancing the critical mass of population, employment and services available locally to those communities.”*

3.7 We also note in paragraph 1.30 of the Greater Cambridge Local Plan Strategic Spatial Options Assessment: Employment Supplement (October 2020), that it confirms industrial and warehousing tend to have a greater reliance on strategic road access rather than public transport and would benefit from the A428 connection (Scotland Farm is located on the A428).

3.8 Scotland Farm’s location adjacent to the Greater Cambridge Partnership proposals for a travel hub at Scotland Farm forming part of the Cambourne to Cambridge scheme therefore serves as an optimal location for employment related development.

3.9 Furthermore, within and surrounding Scotland Farm is a substantial existing residential and employment base. Analysis of employment data within the middle super output area encompassing the site confirms a total of 3,250 jobs within the immediate area, 35% of which are within wholesale, retail and repair of motor vehicles; 26% within manufacturing; and 9% within professional, scientific and technical activities. Other sectors with employment activities in the area include construction, transport and storage; information and communication; and agriculture.

**Figure 1 BRES Study Area**



Source: ONS, Middle Super Output Area South Cambridgeshire 005

3.10 The population of Middle Super Output Area (MSOA) South Cambridgeshire 005 totals 5,000 people. Of those that were economically active at the time of the 2011 Census, some 42% travelled into Cambridge City for work, whilst 40% remained within South Cambridgeshire.

3.11 Scotland Farm is also located within close proximity to Bourn Airfield to the south west. Bourn Airfield plans to provide for 3,500 homes, and material submitted with the outline planning application (S/3440/18/OL) confirms that it is likely to accommodate a population of c.9,500 people, and provide for between 350 – 490 new jobs. On the basis of an economic activity rate of approximately 50%, it is likely that c.4,750 people living within Bourn Airfield will be economically active. Separately we understand that a planning application has been submitted for 26,757 sq m of B1b, B1c, and B8 floorspace north east of Bourn Airfield – said to provide 800 jobs.

3.12 On the basis of an indicative floorspace of between 60,145 sq m and 144,300 sq m, it is estimated that the proposed employment floorspace at



Scotland Farm could generate between 1,500 and 4,000 jobs. As well as meeting the wider employment needs of South Cambridgeshire and Cambridge City, employment development at Scotland Farm will also provide local employment opportunities to those future residents of Bourn Airfield.

3.13 Assuming a GVA per job of £40,800<sup>1</sup>, employment generation on the Site translates to a gross economic output of between £60m and £165m per annum.

**Table 4 Indicative Employment Estimates – Minimum**

	GEA	Assumed GIA	Assumed NIA	Job Density	Jobs Range	
Offices	11,849	11,256	9,005	13	693	
Mid Tech/ workshops/ light industrial	25,539	24,262	20,623	36*-47**	439	674
B8 logistics	23,027	21,876	20,782	70	329	
<b>Total</b>	<b>60,415</b>	<b>57,394</b>	<b>50,410</b>	-	<b>1,460</b>	<b>1,696</b>

Source: HCA Employment Density Guide, 2015

Note: \*Industrial/ manufacturing applied to GIA, \*\*Light Industrial applied to NIA

**Table 5 Indicative Employment Estimates - Maximum**

	GEA	Assumed GIA	Assumed NIA	Job Density	Jobs Range	
Offices	28,300	26,885	21,508	13	1,654	
Mid Tech/ workshops/ light industrial	61,000	57,950	49,258	36*-47**	1,048	1,610
B8 logistics	55,000	52,250	49,638	70	786	
<b>Total</b>	<b>144,300</b>	<b>137,085</b>	<b>120,403</b>	-	<b>3,488</b>	<b>4,050</b>

Source: HCA Employment Density Guide, 2015

Note: \*Industrial/ manufacturing applied to GIA, \*\*Light Industrial applied to NIA

<sup>1</sup> [Cambridgeshires-Economic-Assessment-Business-Profile.pdf \(cambridgeshireinsight.org.uk\)](http://cambridgeshireinsight.org.uk/Cambridgeshires-Economic-Assessment-Business-Profile.pdf)





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## 4. SUMMARY

- 4.1 In summary the Draft Local Plan seeks to provide for 58,441 jobs over the plan period, assuming a central growth scenario, whereas the Council's employment land review recommends that the Council plan for a level of employment floorspace in excess of this based upon past trends in net completions in certain sectors – including logistics.
- 4.2 The ELR recommends that the Councils plan for 664,000 sq m of employment floorspace, and whilst the ELR considers that employment land supply totals 624,000 sq m, the Draft Local Plan concedes that some of these sites will be built out beyond the plan period. In respect of B8 uses specifically, we also note that the shortfall in provision within South Cambridgeshire totals 72,495 sq m, if losses from Cambridge are not taken into account.
- 4.3 Furthermore, the ELR does not appear to consider the increasing demand from data centres, which are placing an increased pressure on the competition for B8 floorspace, and no account appears to be taken from the replacement of existing poor quality stock.
- 4.4 We therefore consider that level of employment floorspace demand is potentially greater than stated in the ELR.
- 4.5 Our client's site at Scotland Farm proposes a mix of employment floorspace, complementing the existing employment uses on the site, and enabling the existing family business to grow in situ. The level of indicative floorspace identified will help meet identified need, and the proximity of the site to neighbouring Bourn Airfield will provide local job opportunities for future residents.