

Greater Ripon Improvement Partnership

Employment Land Research

Final Report

June 2012



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1 Introduction

1.1 Study context and purpose

GENECON has been commissioned by the Greater Ripon Improvement Partnership (GRIP) and Harrogate Borough Council (HBC) to undertake a research study to explore the supply of strategic employment land in Ripon, North Yorkshire. Ripon is a cathedral City and market town, located approximately 11 miles south west of Thirsk and 12 miles north of Harrogate. It is well connected by road, being close to the A1, which provides it with accessibility to the north and south. Its population is around 17,000 and being a market town, its economy is largely focused upon the agricultural sector, although in more recent years it has started to become an attractive commuter town for those working in Harrogate and Leeds. Ripon is also home to several major tourist attractions including Fountains Abbey, Newby Hall and Lightwater Valley.

GRIP is a stakeholder partnership within the City, with a constituted Board and Chair, focused on improving the City by 'growing its economy'. GRIP has prepared a Business Plan to guide its activities and identify key interventions. This identifies the need to ensure that there is a sufficient supply of strategic employment land to support Ripon's economic growth. It recognises that some of Ripon's most significant success stories relate to its business parks and industrial estates and that there is a need to understand these further and to develop a strategy for them and the wider availability of employment land across the City. The main industrial estates in Ripon include Dallamires Industrial Estate, Barker Business Park and the Melmerby Industrial Estate. GRIP is concerned that there are a number of businesses in Ripon that are constrained by the current property offer across the City and that there is a risk that if a suitable and appropriate supply of land/premises is not made available then they may leave the City. It has particular concerns over the businesses currently located at Dallamires and is seeking to understand the extent to which they are constrained by the existing employment land supply position.

In addition to this, HBC is currently developing its Local Development Framework (LDF) to replace the existing Local Plan. The emerging policy documents are suggesting that Ripon already has a sufficient supply of employment land to 2021 and that with the exception of some limited expansion land to be allocated at the Melmerby Industrial Estate, no further strategic employment land allocations will be necessary in this period. GRIP has concerns with this emerging policy context and has asked us to consider this in undertaking this study.

In a nutshell, the purpose of this research study is to assist GRIP with understanding the extent to which there is a need for the further provision of strategic employment land in Ripon, to both assist in retaining existing businesses and attracting new businesses to the City, to support its future economic growth and sustainability.

1.2 Key tasks

The work that we have undertaken as part of this research study includes:

- a review of current strategic business parks and industrial estates in the City, with a particular focus on the major sites including Dallamires Industrial Estate, Barker Business Park, Melmerby Industrial Estate and Ripon Business Park. This is necessary to understand the current supply;
- discussions with tenants at Dallamires to establish key issues/constraints/expansion prospects and whether or not they are being held back by a lack of available expansion space at Dallamires and across Ripon more generally;

- discussions with local commercial property market agents to obtain their views on the current and pipeline employment land supply and whether this is perceived to be an issue;
- a discussion with HBC's Planning Policy Team to understand the current policy position with regards to employment land in Ripon;
- a review of the enquiries made to Harrogate Borough Council for employment sites in the Ripon area;
- consideration of the potential way forward and next steps for GRIP and its partners.

2 Current employment land supply

2.1 Introduction

This section presents an overview of the existing strategic employment land supply across Ripon, exploring both existing sites and also those allocated/committed within the Local Plan and emerging LDF, to identify the current supply position. The purpose of this is to understand what currently exists, what is likely to come forward and where that leaves the City from an employment land supply perspective.

2.2 The Harrogate District Local Plan and the emerging LDF

2.2.1 *The Local Plan*

The Harrogate District Local Plan was adopted in February 2001 and the most recent update was in September 2007. This sought to both safeguard existing industrial and business land/premises and to make provision for new industrial and business development to meet employment needs. This identifies a 6 hectare employment land commitment on the Melmerby Industrial Estate, as well as further employment land allocations on the same site (10.7 hectares), Boroughbridge Road (4.9 hectares), Harrogate Road (4.9 hectares) and Hutton Bank (0.2 hectares). The Local Plan is currently being replaced by the emerging LDF, as outlined below.

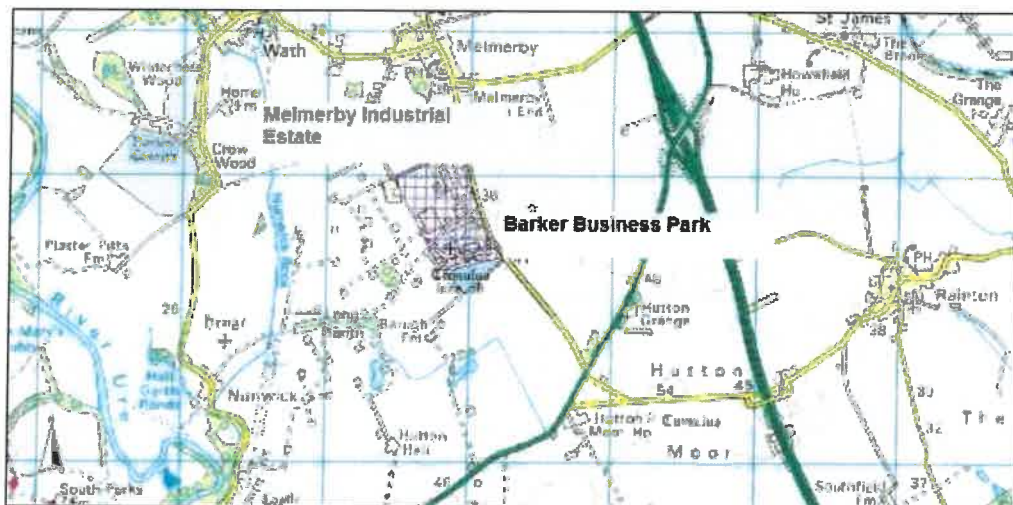
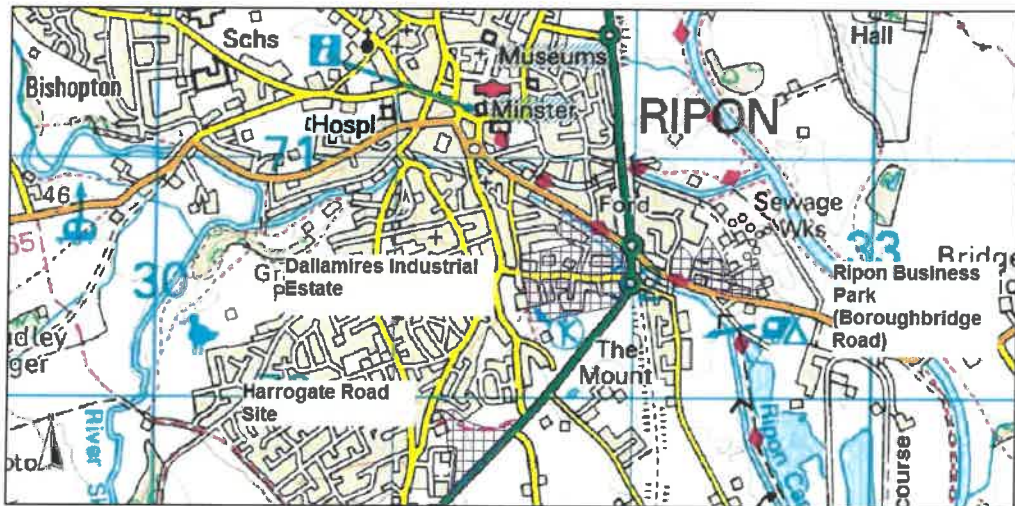
2.2.2 *The Harrogate District Local Development Framework*

The Core Strategy was adopted by the Council in February 2009. This is the key document within the LDF which sets out the direction and strategy for development in the District up to 2021. Informed by a 2006 District Wide Employment Land review (the Drivers Jonas study) This suggests that there is sufficient provision for new employment land in the Ripon area but longer term supply of employment land should be kept under review.

The emerging LDF will also comprise a Harrogate District Sites and Policies Development Plan Document (DPD). As part of this, a document entitled 'Employment Land Provision in Urban Areas' was prepared by HBC in September 2011. This draws upon and updates the evidence provided within the 2006 Employment Land Review which concluded that there was sufficient land available to meet the needs of the Ripon area, together with a new allocation at Barker Business Park at Melmerby. The LDF Draft Proposals Map which accompanies this document identifies four existing and proposed strategic employment sites across Ripon, which are identified as being the 'best' and 'good' employment sites in Ripon (there are other existing employment sites in Ripon not illustrated on the Map given that they have not been classified in as 'best' or 'good' sites). These four sites are presented below:

- Dallamires Industrial Estate
- Harrogate Road site
- Ripon Business Park (Boroughbridge Road)
- Barker Business Park / Melmerby Industrial Estate

These are identified on the extracts from the LFD proposals map below in a purple hatching:



2.3 Existing employment land supply in Ripon

This section provides an overview of the four existing main employment sites within Ripon, including a description of the site, the types of uses/occupiers on the sites and the level of void units.

□ Dallamires Industrial Estate

Dallamires Industrial Estate is located on Dallamires Lane, just off the A61 Ripon Bypass. It is a very centrally located 15 hectare site with good road frontage onto the A61. It is Ripon's main central employment site and comprises a range of uses from light industrial and warehousing through to trade counters, car showrooms and a leisure centre. The majority of the units appear to be in a reasonable physical condition, although there are some lower grade buildings throughout the estate. The estate does feel rather disjointed and 'random' in parts, with the sense that certain

units have been acquired and are now used for uses which they were perhaps not originally intended for. The units are in a mix of freehold ownerships although it is clear that Ripon Farm Services and KA Andersons Metal Recyclables are occupying a large proportion of the site, through acquiring any units that do become vacant. This is a fully developed site with no vacant plots and no vacant units. Some of the tenants on the site include:

Ripon Farm Services Ltd	KA Anderson Metal Recyclables
Batchelors of (Vauxhall/Mitsubishi/Suzuki)	Ripon Ripon Select Foods
Plumb Centre	Howdens
Simply Beds	Agricultural Supply Systems
Fiat	Simco
ATS	Sales & Hire Centre
Kia Motors	FB Taylor Cable Contractors
CEF Electrical Supplies	Leehill Construction Ltd



□ Ripon Business Park (Boroughbridge Road)

Located off Boroughbridge Road, close to the centre of Ripon, this is an established Business Park which has been developed by Canalside Developments (Yorkshire) Ltd. The c.4.9 hectare site comprises a range of uses from B1 office uses in Canalside House through to building merchants and trade suppliers, which seem to dominate much of the site. Plots are available to let only, with the possibility of design and build opportunities, and the entire site is developer owned. The units appear to generally be in a good physical condition. The majority of the units appear to be let but there are some vacant plots of land allocated for office/warehouse/light industrial uses. It is understood that these vacant plots equate to c.1.6 hectares in total and are located on three different and unconnected parts of the site, with two of them currently being used for car parking and as a depot for North Yorkshire Council grit distribution vehicles. Some of the existing occupiers on the site include:

Bill Plant Driving Instructors	Plumbing Trade Supplies
Travis Perkins Timber & Building Supplies	Brian Whincup & Sons Trailers
North Yorkshire County Council	MKM Builders Supplies
Express Screed	Simply Bathrooms & Tiles



□ **Barker Business Park, Melmerby**

The Barker Business Park is located off the A61 in Melmerby, 4 miles north east of Ripon and 1.5 miles from the A1. It is set in a rural location and offers a range of business premises from 1,500 sqft to 200,000 sqft. These include light industrial, warehousing and office uses and a range of leasehold and freehold options are on offer. The units are all in a good physical condition and 98% of the site's developed floorspace is occupied (there are two 1,500 sqft food start-up production units currently to let), with the exception of the some of the office units. The site has developed a cluster of businesses within the food/drink sector and 11 units are occupied by businesses in this sector. The site's agent is currently marketing an adjacent 5.5 hectare greenfield expansion site for a mix of office/industrial uses, with 5 plots from 2,500 sqft to 200,000 sqft. This site is remaining land already allocated within the Local Plan. In addition to this, the adjacent Melmerby Industrial Estate which is operated by the Potter Distribution Group, has been provisionally allocated an additional 4 hectares of expansion in the emerging draft LDF.

Barker Business Park is home to over 40 businesses, some of which are listed below:

Wolsley

Nidd Transport

Madera Uk Ltd

Hydrema

Beyond Digital

Nick Stafford's Hambleton Ales

Hemingways

Vine & Taylor

Spa Vending
 Elizabeth Smedley

Crofters Foods
 Ryco Crafts



Harrogate Road site

This is a 3.7 hectare greenfield site located adjacent to the A61 and the existing Morrisons foodstore. It is allocated in the Local Plan as an employment site. It is currently fenced off as a 'construction site' but no construction activity has commenced on site. However, we are aware of a planning application that is currently being considered by HBC received from Optimisation Developments Ltd with regards to proposals for a new Morrisons Superstore on the site, as well as a 60 bed hotel, 5 B1 office blocks and 1 showroom. As part of the application, it intends to convert the existing Morrisons store (see photo below) into a DIY store.



2.4 Availability of employment land

In terms of the availability of vacant land on the four key employment sites across Ripon, we are aware of the following:

- Dallamires Industrial Estate** – this 15 hectare site is at capacity with no vacant plots and no room for expansion;
- Harrogate Road site** – c.3.7 hectares of available land for development.

- **Ripon Business Park (Boroughbridge Road)** – we understand from discussions with HBC that there could be c.1.6 hectares of available undeveloped land on this site;
- **Barker Business Park / Melmerby Industrial Estate** – the existing floorspace that has been developed is 98% occupied. A further 5.5 hectares of land is currently being marketed as a development opportunity for new plots (remaining land allocated within the Local Plan). In addition to this, the LDF is seeking to allocate an additional 4 hectares of employment land to the south of Barker Business Park in Melmerby.

2.5 Analysis of property availability in Ripon

The available HBC data provides information on the type and level of available commercial property in Ripon, to further inform this research study. The most recent data that is available relates to Q2 (July – Sept) 2011 and a summary of this is presented below¹:

Industrial/warehouse accommodation

- There are a total of 8 available units, comprising a total of 21,485 sqft.
- 12,440 sqft (58%) of this relates to warehouse accommodation, 5,710 sqft (26%) to B1 light industrial accommodation and 3,335 sqft (16%) to general industrial B2 accommodation;
- 5 of the 8 available units are less than 1,000 sqft in size and there are no available units over 10,000 sqft. The other 3 are between 2,500 sqft and 10,000 sqft.

Office accommodation

- There are a total of 15 available office units, comprising a total of 48,308 sqft.
- 8 of these (53%) are between 1,000-2,499 sqft, 3 are under 1,000 sqft and the remaining 4 are between 5,000 sqft and 20,000 sqft.

This equates to a total of 23 units comprising 70,000 sqft of available commercial floorspace (excluding retail) in Ripon. However, one-third of these units are very small (less than 1,000 sqft) which may be too small for many occupiers and furthermore, many of these are likely to be low grade units in 'ad-hoc' locations around the City. Our analysis has identified that there are very low void rates on the four established employment sites and so much of this vacant floorspace is likely to be low quality and non-purpose built accommodation, which may not be 'fit for purpose' for many occupiers.

2.6 Summary

In summary, if we assume the 'worst' case (from an employment land perspective) that the planning application for the new Morrisons store on the Harrogate Road site is approved, this only leaves the 1.6 hectares on the Ripon Business Park site and the expansion land at Barker Business Park as allocated 'available' employment land within Ripon. Dallamires Industrial Estate is fully occupied with no vacant plots/expansion land and furthermore, is not perhaps the most appropriate site for the future development of Ripon's industrial/manufacturing activity, given its neighbouring residential uses. It also has a rather dated feel, which may not suit potential businesses relocating from elsewhere and the clear presence of a household refuse site and a metal recycling facility may discourage occupiers in the same way.

¹ It is acknowledged that the data relates to Sept 2011 and that the current position is likely to be different, although this data is still useful in providing an overall indication of the current availability of commercial property in Ripon.

Barker Business Park has developed a distinct focus on the food and drink sector and is seeking to strengthen and develop this further going forward, which may discourage other types of occupiers. Furthermore, its location at Melmerby is excellent from a national road network connectivity perspective, but its more 'out of town' location and distance from the City Centre is not appropriate for businesses with a retail focus and a need for passing trade. At present, Ripon Business Park represents the only available employment land adjacent to the City Centre (assuming the Morrisons application is successful) and the 1.6 hectares of land that is available is not a single contiguous plot, given the way in which the site has been developed to date. This land is also not available on a freehold basis, which again could deter potential occupiers.

Under this scenario, the limited supply of allocated employment land could serve as a critical barrier to the future growth of Ripon's economy, given the plan period extends to 2021. It could result in existing businesses looking to expand having to relocate outside of Ripon and also limited opportunities for new businesses to base themselves in Ripon.

3 Potential demand for new employment land

3.1 Introduction

In addition to the land 'supply' position set out above, It is important to assess the likely potential 'demand' for employment land in Ripon. This has been undertaken through a combination of enquiry analysis, utilising HBC's database of enquiries, and through a consultation process with local businesses and commercial property agents and the key findings are presented in this section.

3.2 Analysis of enquiries in Ripon

As part of this study, we have analysed HBC's database of enquiries it has received with regards to requirements for office, warehousing and workshop/light industrial accommodation in Ripon that are over 1,000 sqft in size. We have analysed all enquiries from the past three years in order to understand more about the quantum and type of enquiries that have been made and a summary of this is presented below:

Industrial	
Size	Number of Enquiries
0-999 sqft	29
1,000-2,499 sqft	56
2,500-4,999 sqft	63
5,000-9,999 sqft	72
10,000-19,999 sqft	39
20,000-39,999 sqft	21
40,000 + sqft	65
TOTAL	345

Office	
Size	Number of Enquiries
0-999 sqft	29
1,000-2,499 sqft	28
2,500-4,999 sqft	19
5,000-9,999 sqft	16
10,000-19,999 sqft	17
20,000-39,999 sqft	8
40,000 + sqft	41
TOTAL	158

Warehouse	
Size	Number of Enquiries
0-999 sqft	23
1,000-2,499 sqft	51
2,500-4,999 sqft	58
5,000-9,999 sqft	74
10,000-19,999 sqft	39
20,000-39,999 sqft	18
40,000 + sqft	60
TOTAL	323

The following summary is presented based upon an analysis of the above:

- Over the three year period, HBC received 826 enquiries for industrial, office and warehousing premises in Ripon, equating to an average of 275 per annum. This is a significant number of enquiries given the location, scale and nature of the Ripon economy;
- The majority of the enquiries were for industrial accommodation (42% of total), followed by warehousing (39%) and office accommodation (19%). This reflects the type of economy within Ripon, which is more focused on B2/B8 activities rather than B1 office activity, which is more prevalent in locations such as Harrogate and Leeds;
- Enquiries across all three uses classes were for a wide range and mix of sizes from less than 1,000 sqft through to 40,000 sqft plus.
- The number and type of enquiries clearly outweighs the level of available commercial floorspace in Ripon, based upon the analysis undertaken in section 2.5. This implies a clear case of potential demand levels outstripping the current supply.

3.3 Consultations with local businesses

As part of this study, we have consulted with a range of businesses on the Dallamires Industrial Estate² to obtain their views on whether they consider there to be a lack of employment land in Ripon and if so, whether this is currently serving as a constraint to their potential growth and expansion plans in the City. The purpose of this was also to understand from them any issues they may have with Dallamires Industrial Estate as a business location. We have consulted with 7 of the wholesale and retail trade businesses, including:

- Simply Beds
- Kia Motors
- ATS Euromaster
- KE Bland Fruit and Vegetables
- City Electrical Factors
- Agricultural Supply Services Ltd

² Our brief from GRIP was to focus our consultation work with the retail/trade businesses at Dallamires.

□ Plumb Centre.

Some of the key messages arising from these consultations are presented below:

- Of the 7 businesses that we consulted with, only 1 indicated that it is currently constrained in its current unit on Dallamires and that despite looking around Ripon for some time, is unable to find a more suitable and larger available unit. This business did not suggest that it was seeking to relocate from Ripon as a result and as part of a national chain, suggested that any such decision would be made at the Head Office level. The remaining 6 businesses all indicated that they are not looking to expand at present and that from their business perspective they do not have any issues with the current supply of employment premises in Ripon;
- On the whole, the businesses on Dallamires appear to have been established on the estate for some years and are generally content with their location and premises;
- A concern was raised from one particular retailer that it is the only retailer on the estate which relies on custom with the general public only (as opposed to trade) and despite being relatively content on Dallamires, would ideally rather be located on a retail park rather than what is essentially an industrial estate. However, it acknowledged that there are no 'out of town' retail parks in Ripon and is not looking to move elsewhere outside of Ripon. This particular retailer is currently opening up a new second store in the City Centre which is due to open in May 2012;
- The retailers expressed some general concerns they have with Dallamires which include the presence of the household refuse site and associated traffic issues, a lack of signage, the need for CCTV, the condition of the roads and the high business rates.

In summary, it is evident that the majority of existing 'retail/trade' businesses on Dallamires are not constrained in terms of their growth by a lack of expansion space. The estate appears to be popular, given the low levels of voids, but it has been noted that the metal recycling business appears to be acquiring any sites that do become void and is occupying an increasingly large proportion of the estate. This is not a healthy long term position for the City, given the strategic nature of the site and its close proximity to the core City Centre historic and residential area.

3.4 Consultations with local commercial property agents

To further inform the study, we also consulted with a number of commercial property agents active in the Ripon area. Some of the key points emerging from these discussions are outlined below:

- Ripon occupies a very strategic location just off the A1, with access to the national road network both north and south. However, it does not comprise many large employment sites;
- The employment sites that do exist are not well located in the City – several are adjacent to residential areas, which restricts both the type of activity that can take occur as well as the potential for them to expand;
- One particular property agent noted that, HBC as the Local Planning Authority appears to be very anti 'residential-only' planning applications in Ripon. As a result, applications are often submitted as 'mixed-use' to obtain approval, but in reality the sites which are in question are only really suited to residential development, given proximity to the City Centre and neighbouring uses. This results in employment land being developed in rather random and inappropriate locations across the City, rather than in strategic locations which are more suited to employment uses. There is a need for increased flexibility from a planning policy perspective as a result;

- There is a need to identify a potential site(s) for new employment land in Ripon to provide space for businesses to expand and for new businesses to be attracted to the City;
- In addition to this, the City Centre itself needs focus and investment as part of the overall package if business is to be retained/attracted in Ripon;
- One agent had received several enquiries for 2-3,000 sqft type light industrial/warehousing premises in recent months but was unable to locate any suitable premises in Ripon.

3.5 Summary

With an average of 275 enquiries per annum for the past three years for commercial premises in Ripon, there is clear evidence of market demand. 80% of these enquiries were for industrial/warehousing accommodation, which provides an indication of the type of premises that are being sought. From speaking to several local businesses on the Dallamires Industrial Estate, it does not appear that the 'majority' are being held back by a lack of suitable employment land provision in Ripon. The vast majority were generally content with their premises at Dallamires and had no present or short-medium plans to expand. It is worth noting that most of these businesses are part of national retail businesses and that decisions regarding expansion/relocation are usually discussed and determined at a Head Office level rather than at a branch manager level. Discussions of this nature could therefore be ongoing, although the fact that many of the businesses have been established on Dallamires for so many years implies strong affinity with the location.

The local property market agents supported a view that there is a lack of larger strategic employment sites in Ripon given its strategic location on the A1 and that what does exist is relatively well occupied. Importantly, they recognised the need for new provision to be delivered alongside a package of wider investments to reinvigorate the City Centre, to make Ripon a more attractive business location. In the absence of any further allocated employment land for Ripon in the emerging LDF, the agents suggested that this situation may worsen and that Ripon's economy could deteriorate further.

4 Key findings and options moving forward

4.1 Key findings

This research has explored the current and likely future provision of employment land across Ripon, together with potential demand, to establish whether there is an emerging case for additional employment land in the City. The consultations with several existing businesses at the Dallamires Industrial Estate has indicated that they are not currently constrained and do not see that position changing in the short-medium term, but, there has also been a healthy level of enquiries from potential occupiers seeking commercial premises in Ripon over the past few years.

Some key issues have emerged from this study, as set out below:

- The existing strategic employment locations across Ripon are close to full occupation, with very few void units;
- Dallamires Industrial Estate is full and there are no vacant plots or neighbouring land parcels for expansion. There are therefore limited opportunities for businesses at Dallamires to remain at Dallamires if they want to expand;
- The existing premises at Barker Business Park at Melmerby are also close to full occupation, albeit there is a further 5.5 hectares of expansion land currently being marketed and there is also a further 4 hectares potentially to be allocated through the emerging LDF. However, Barker Business Park is focusing on the food and drink cluster and furthermore, its 'out of town' location at Melmerby does not support wider policy objectives of strengthening the retail and business core of the City Centre;
- Ripon Business Park is largely full in terms of its developed units, although there is understood to be 1.6 hectares of undeveloped and available land in pockets around the site;
- The other major strategic employment site is the 3.7 hectare Harrogate Road site, adjacent to the existing Morrisons site. However, a planning application to develop a new Morrisons superstore (as part of a wider mixed use scheme, which includes new office/industrial units) on this site is currently being considered.

If we assume a 'worst' case position in employment land supply terms i.e that the planning application on the Harrogate Road site is successful, then there is a likely to be significant shortage of strategic employment land available in Ripon – arguably, only the 1.6 hectares at Ripon Business Park. Barker Business Park is predominately a cluster expansion location for the food/drink sector and the rationale for the additional employment land allocation in the emerging LDF is based on the growth of that specific sector.

This would indicate that there will be a problem in due course in relation to the availability of employment land in Ripon. The availability of only 1.6 hectares in the City, on a single site where there are no freehold opportunities, is likely to present a constraint to the City's economic growth potential and long term economic sustainability.

4.2 Potential options moving forward

Ripon has a potentially significant employment land issue moving forward (particularly if the Morrisons application is successful), given the limited supply and the current proposals within the emerging LDF. Potential options available to GRIP moving forward, to ensure that the City is able to realise its economic growth and sustainability aspirations and that it is not constrained by a lack of suitable and appropriate employment land, are set out below:

- ❑ **Representation to HBC through LDF process** – GRIP could make a representation to HBC, through the LDF process, raising its concerns on the allocation of employment land in the City. There would be a significantly limited supply (if Morrison's is approved) and based on previous enquiry levels, there is a strong indication of market interest in the City. The Sites and Policies Development Plan Document is in the process of being prepared by HBC and this presents an opportunity for Ripon to ensure that it is represented accordingly within the emerging policy context from an employment land supply perspective.
- ❑ **Identify additional employment land** – to support this, GRIP could prepare an analysis of land currently available or surplus to requirements across the City that could potentially be put forward as further allocations for additional employment land through the LDF process, for employment uses in the medium-longer term.
- ❑ **Enhance the utilisation of existing employment land** – despite being close to full occupation, it is evident that a more effective use could be made of some of the existing employment sites across Ripon. Dallamires Industrial Estate is the prime example and the sprawling use of the estate by a metal recycling business is perhaps not the best use of what is essentially the City's prime employment location. A large part of the estate is also used as a storage facility for agricultural machinery and if this was to be relocated elsewhere then higher value uses could be delivered on this part of the site, supporting the City's economic development objectives. An industrial estate rationalisation process is a challenging approach, but in the long term, the presence of large sheds and bad neighbour uses on a site as important to the City as Dallamires is not ideal. A long term objective to improve the quality and 'value' of Dallamires, given its proximity to the residential areas and its prominence on the bypass, would be a valuable approach.