

Local Development Framework for Bradford

Evidence Base

Employment Land Review Update

October 2011



City of Bradford MDC

www.bradford.gov.uk

EMPLOYMENT LAND REVIEW UPDATE – 2011

CONTENTS

Chapter 1: Introduction

Chapter 2: Bradford District Profile

Chapter 3: Existing Economic and Business Profile

Chapter 4: Bradford District Property Market

Chapter 5: Current Employment Land Supply in Bradford District

Chapter 6: Future Economic and Spatial Change in Bradford

Chapter 7: Projected Demand for Employment Land

Chapter 8: Future Strategy to Meet Employment Land Demand

Appendix 1: Site Assessments

Appendix 2: Employment Land Supply Resulting from EDS Site Assessment

Appendix 3: REM Bradford Industries 2007 to 2026

1.0 INTRODUCTION

1.1 Employment Land Review 2007

- 1.1.1 In the summer of 2007, Bradford Council commissioned Arup and DTZ to undertake an Employment Land Review as evidence base to inform the emerging Local Development Framework. It would contribute to the development of economic policy within the Core Strategy and later, the identification of employment land in the Allocations DPD. The methodology was based on Central Government best practice guidance, issued by ODPM in 2004.
- 1.1.2 The report broadly presented an economic overview of Bradford District with an assessment of market and property trends and data. It evaluated projections of future demands for employment land based on past trends and selected the Regional Econometric Model (REM) as a basis for determining future employment land need in the District. The Review undertook an appraisal of all sites in the current land supply against a range of criteria to assess their suitability for future employment use, focusing on attractiveness to the market and any delivery constraints. It made a comparison of the most suitable supply in terms of size, location and potential employment type against perceived demand as determined by the REM and following this analysis, set out a broad locational and settlement strategy for the economic development of the District.
- 1.1.3 Arup were provided with a data base of the Council's portfolio of registered employment land. This included those sites allocated in the 2005 Replacement Unitary Development Plan but still undeveloped and available. It also included unallocated and undeveloped sites with the benefit of an extant planning permission at June 2007. The Regional Econometric Modelling process was based on statistics produced in 2006 modelled up until 2016. A straight line projection was then added up until the year 2021, the anticipated end of the Plan period. The current plan period now extends until 2028.

1.2 Historical Context

- 1.2.1 The document was completed and submitted to the Council in December 2007. Since this period, there have been significant changes to the structure of the national, regional and the local economies. The District has suffered from a deep economic recession with growth in unemployment and worklessness and falls in the employment rate. The UK and local economy has contracted with most sectors affected, including the service sector which makes up 75% of the economy. The local property and investment market has declined resulting in reduced economic development. In 2006 the REM jobs growth projection for Bradford was 4,720 jobs per annum. The figure now stands at around 1100 per annum across all sectors. Business recovery is ongoing but is slow and patchy and is not yet creating any significant jobs growth.
- 1.2.2 The data and information input to the Employment Land Review is clearly outdated, given the 4/5 year timescale and the effects of the recent economic recession. It has been necessary to undertake a refresh of the 2007 Review based on the latest economic figures and projections. Each Chapter has been assessed and updated relative to their statistical content, recent developments in the investment and property market, latest REM projections and the Council's Strategic aspirations. This has been carried out by Officers in the Council's Economic Development and Property Department.

1.2.3 The revision has been prepared as an addendum to the 2007 Employment Land Review. In chapters where there has been little change to factual content, only minimum comment has been added. In others, facts and projections have been updated to incorporate latest statistics.

2.0 BRADFORD DISTRICT PROFILE

2.1 Introduction

2.1.2 In this chapter the general locational factors remain unchanged. There are however some changes to the population structure which are updated in this text. There is little change to the current role of the settlements.

2.2 Bradford District in Context

2.2.1 Bradford forms the second largest conurbation in the Leeds City Region. The population of the district is just over half a million. It's close proximity to Leeds, Halifax and Huddersfield means the district is part of a much wider labour market with 5.6 million people living within a one hour drive time. Bradford has an economy worth £7.8 billion, the third largest in Yorkshire and the Humber after Leeds and Sheffield.

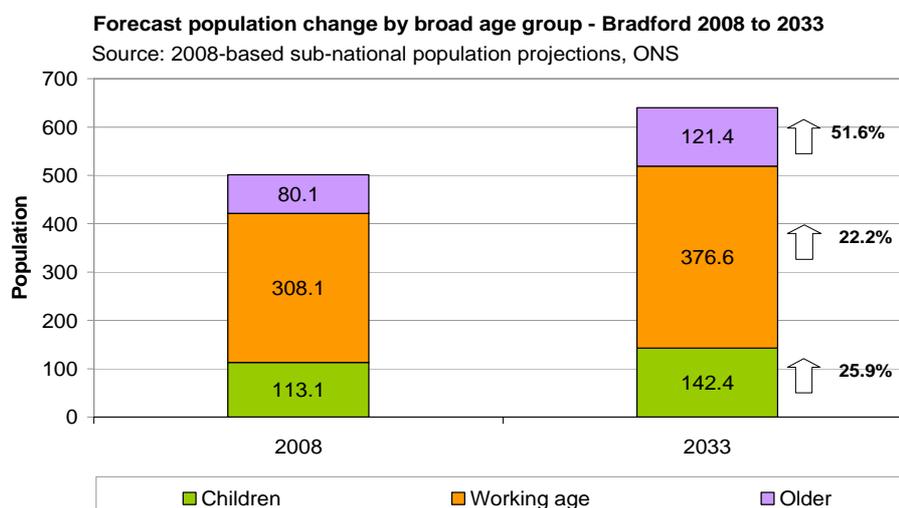
2.3 Population

2.3.1 512,620 people live in Bradford making it the 4th largest metropolitan district in England, after Birmingham, Leeds and Sheffield. 22.6% of the population are under 16 making Bradford the youngest major city in Great Britain. Following a decline during the late 1990s, Bradford's population grew by around 42,000 between 2001 and 2010;

2.3.2 Forecasts show the population continuing to rise at a relatively rapid rate and in terms of absolute numbers is expected to undergo the fourth largest population increase of all English districts over the period to 2033 (behind Leeds, Birmingham and Bristol). Between 2009 and 2033 the district's population is expected to undergo an average annual increase of around 5,500 to reach 640,400 in 2033.

2.3.3 The working age population, which currently stands at 327,900, is expected to increase to 376,600 by 2033, representing a rise of 22.2%. While this growth represents an opportunity for an expanding economy, in times of recession and slow recovery it represents a challenge as the district requires a growth in jobs to match the growth in population.

Figure 2.1



2.4 Links Beyond Bradford

- 2.4.1 Census 2001 data shows that 41,500 residents commute out of Bradford to work and 45,000 people commute into the district to work. This equates to a total of 86,500 commuter trips in and out of the district every day. Nearly 37,000 of these trips are between Bradford and Leeds.
- 2.4.2 Bradford district plays an active role in the Leeds city region, befitting its scale as the second largest economy in the functional economic area. The city region, through the Local Enterprise Partnership provides a suitable scale at which to work with businesses and relate to government on common issues and shared opportunities.
- 2.4.3 Collaboration between the two districts on the Leeds/Bradford corridor is creating opportunities for investment and development. Bradford has other economic relationships within the city region and beyond that do not reflect traditional administrative boundaries, such as common labour markets with Kirklees and Calderdale to the South and Skipton and Craven to the North. Connections to Manchester and Lancashire along the M62 have contributed to a growing logistics and distribution sector in the south of the district.

2.5 Summary

- 2.5.1 Bradford district has a range of assets and opportunities, which can form a firm basis for employment growth across the district. The district has a major role within the city region and proximity to Leeds offers a great potential for future growth. Only nine miles apart, Leeds and Bradford's economic relationship has been defined as interdependent. This relationship creates opportunities for co-operation in delivery, which are currently being explored in specific areas included joint marketing opportunities and shared approaches to inward investment. Such interdependence also allows Bradford to play to its distinctive strengths. Bradford has an important complementary economic role to offer, for example, in developing an office accommodation product within Bradford's city centre that is more affordable to businesses looking for new good value space close to good supply chains and transport hubs, will benefit businesses across the whole of the city region.
- 2.5.2 The district has a growing work age population which presents both opportunities and challenges for economic growth and job creation. Raising skills levels is key to ensuring local people are equipped to create and take up employment both within and outside the district.
- 2.5.3 Bradford has a powerful culture of entrepreneurship. This is a distinctive asset for the district, and its outcomes can be seen in the appetite of people to start their own business, the actual numbers of business start ups and rates of self employment that have the potential to deliver significant home grown employment growth.

3.0 EXISTING ECONOMIC AND BUSINESS PROFILE

3.1 Introduction

3.1.1 This section sets out an overview of the current economic situation in Bradford district. It assesses the district's employment and unemployment rates compared to the regional average. It profiles the largest employers in the district and seeks to understand which industrial sectors are performing well and are likely to continue growing. This section also looks at the health of the district's economy from the perspective of business start-ups and new business registrations.

3.2 Employment and Economic Activity

3.2.1 Table 3.1 summarises economic activity in Bradford District. It shows that Bradford's level of economic activity is significantly below that of Yorkshire and the Humber as a whole. Bradford's economic activity rate is 5.9 percentage points lower and its unemployment rate is 1.9 percentage points higher than the regional average. 201,800 people aged 16-64 in the district are currently employed, a rate of 61.8%. This is significantly below the regional (68.5%) and national (70.2%) rates. Employment rates have fallen by 7.9 percentage points since December 2008 compared to a fall of 1.6 percentage points across the UK as a whole. There are 24,600 people unemployed in Bradford, accounting for 10.9% of the economically active working age population, higher than the unemployment rates for Yorkshire & the Humber (9.0%) and Great Britain (7.8%). The proportion of the ethnic minority working age population who are unemployed in the district is also significantly higher than the regional average at 19.2% compared with 15.2%.

Table 3.1 Comparison of economic activity in Bradford district and Yorkshire and the Humber

Economic activity	Bradford District	Yorkshire and Humber
Economically active (as a percentage of the working age population)	69.3%	75.2%
Employment (as a percentage of the working age population)	61.8%	68.5%
Unemployed (as a percentage of the total economically active population)	10.9%	9.0%
Percentage working age population of ethnic origin unemployed	19.2%	15.2%

Source:

Annual Population Survey January 2010 to December 2010 NOMIS

3.2.2 A key issue is rising worklessness levels (defined as those unemployed and seeking work plus those economically inactive i.e. out of work but not seeking work. Approaching two fifths (38.2%) of the working age population in the district were workless (124,900) at December 2010 up from 33.0% one year earlier. This rate is significantly higher than the UK national average (29.8%),

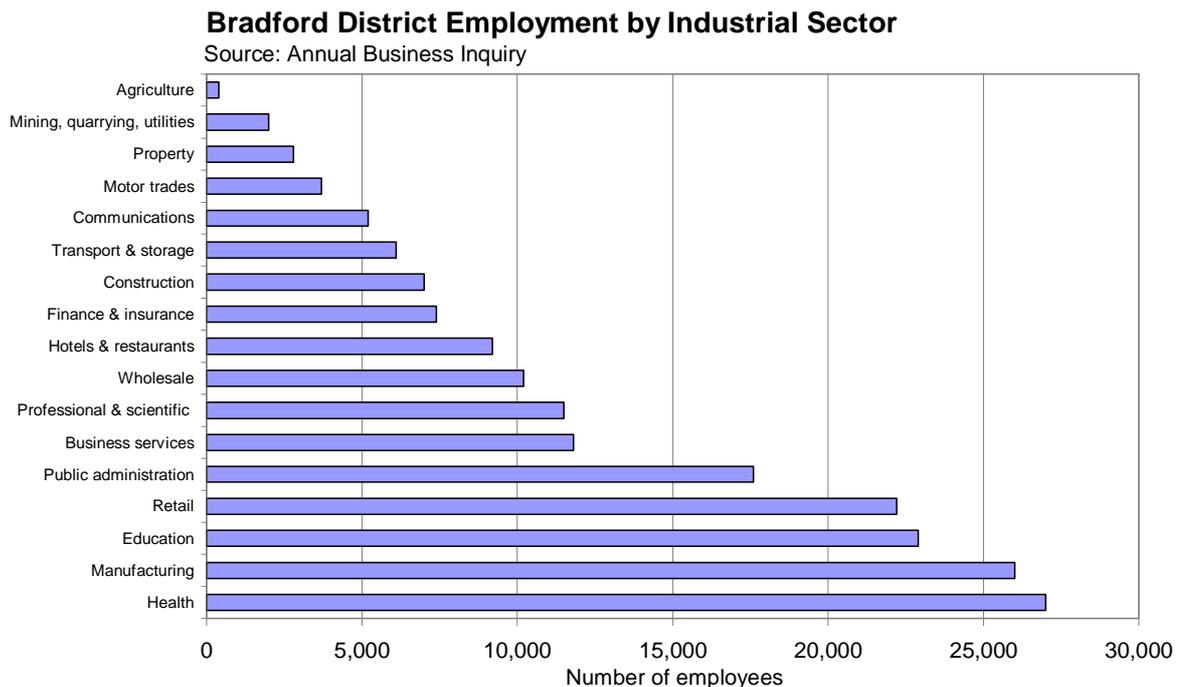
Y&H regional average (31.5%), and the Leeds City Region average (31.7%). The workless rate is the highest of any district in the Y&H region.

- 3.2.3 The high level of female worklessness is the key factor in the district's overall poor worklessness performance. At 47.0%, the female worklessness rate in Bradford is the highest of any district in Yorkshire and the Humber where the average worklessness rate is 35.8%. Bradford's rate is also higher than the UK (34.9%) and Leeds City Region (36.0%) averages. Two thirds 63.8% (49,100) of women who are workless in the district say they do not want a job.
- 3.2.4 Low qualifications are therefore a significant barrier to employment and as future job growth in the region is predicted to be most significant within high and medium skilled occupations, the lack of any or higher level qualifications will pose an increasing challenge to the sections of Bradford's workforce with low skill levels. Recent years have seen significant improvements in educational attainment among children, but a lower proportion of Bradford's adults than the national average have the minimum qualifications deemed necessary for employment.
- 3.2.5 The employment rate for those aged 16 to 64 years qualified to at least Level 4 in Bradford is 83%, which is currently slightly lower than Y&H regional (84.3%) and UK national averages (83.7%). However, the employment rate for adults without any qualifications in the district drops to 32.4% which is significantly lower than the UK average of 40.6% and the Y&H region average of 37.1%. This means that 67.6% of those without any qualifications in Bradford are not in employment. Of those who have up to level 2 qualifications, 72.6% are in employment.

3.3 Employment Structure

- 3.3.1 This section uses the Annual Business Inquiry 2008 data as the source for data in this section. The ABI 2008 was replaced by the BRES 2009. The BRES data is only available for 2008 and 2009 therefore it cannot be used for trends. Also, the ABI included workplace unit (businesses) data which the BRES doesn't. For these reasons the ABI 2008 data has been used – it also keeps this section in the ELR in-line with the Council's Local Economic Assessment.
- 3.3.2 Bradford's economy has continued to diversify over recent years and has a varied employment base. There are around 16,000 businesses employing 192,000 people. The service sector accounts for 82% of all workplaces and 81% of all employees in the district. Nevertheless the district has retained a relatively large manufacturing sector with around 1,400 firms employing 29,000 people which ranks Bradford as the seventh largest manufacturing location in Great Britain.
- 3.3.3 Figure 3.1 shows employment by industrial sector. Health is the district's largest sector employing 27,000 people accounting for 14% or one in seven of all employee jobs. Retail and wholesale, with 32,400 employees, accounts for 20% of all employee jobs compared to 16% nationally. The Business Services sector with 22,700 jobs is under-represented compared to regional and national averages. Financial services employment has seen an 18% fall between 2003 and 2008 and is also under-represented in the district.

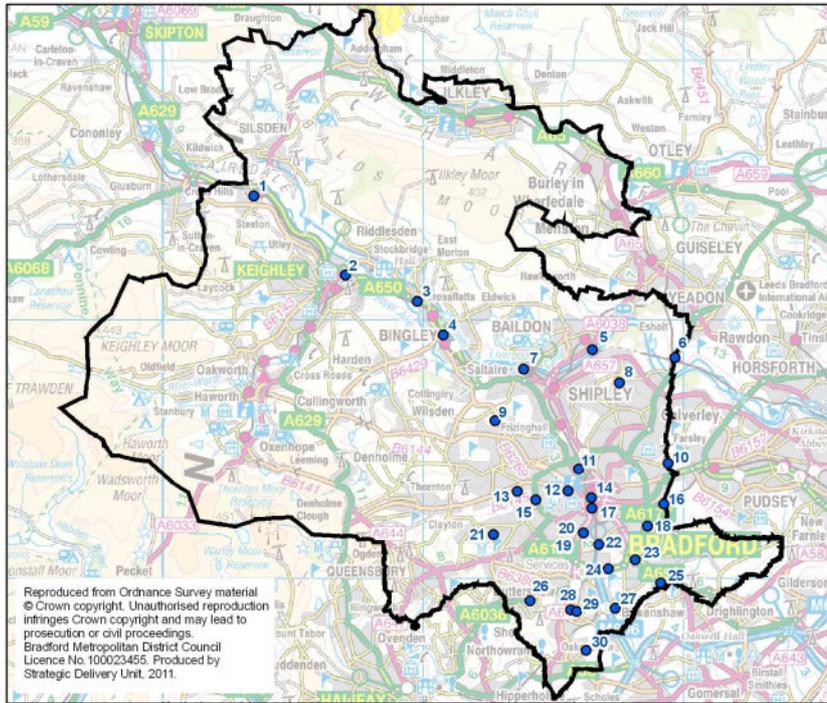
Figure 3.1



- 3.3.4 Manufacturing employs 26,000 people which is 13.4% of all employees. Significant sectors within manufacturing are engineering, printing, food and drink, chemicals, rubber and plastics, engineering, automotive and furniture manufacture. Textiles remain a locally important sector despite major job losses in recent decades. The decline in manufacturing employment has slowed in recent years and is forecast to stabilise at around 22,000 jobs over the next fifteen years.
- 3.3.5 Public sector employment is a very significant part of Bradford's service sector accounting for 31% of all employment in the district – a relatively high percentage compared to 27% nationally. The higher proportion in Bradford is due to higher than average employment in health and education which together account for one in four of all jobs in the district.
- 3.3.6 Between 2000 and 2008 the number of public sector jobs in the district increased by 7,400 to 60,300, an increase of 14%; due to growth in health and education. Over the same period private sector jobs fell by 10,700. These opposing trends have led to the district becoming increasingly dependent on public sector employment. Indeed public sector take-up accounted for 25% of all office occupation over the five years to 2007.
- 3.3.7 Bradford is home to a number of major UK businesses with recognised brands operating on a national and international scale including Wm Morrison Supermarkets Plc, Yorkshire Building Society, Banco Santander and Hallmark Cards Plc. Figure 3.2 shows the location of the top 30 private sector employers in the district. It can be seen that big employers are spread quite widely across the district suggesting a lack of a consolidated central district although in employment terms the city centre is a major location with 36,000 jobs which in one in six of all employee jobs in the district. The map also shows that the urban area of the city of Bradford is where the majority of the biggest employers are based with the Aire Valley an important secondary location.

Figure 3.2

Top 30 Companies in Bradford District



Label	Name	Label	Name
1	Acorn Mobility Services Ltd	16	Loop Customer Management Ltd
2	Kone Plc	17	Santander
3	Bradford & Bingley Plc	18	Virgin Media Ltd
4	Damartex UK Ltd	19	Jacuzzi UK Group Plc
5	DENSO Marston Ltd	20	Chesapeake Branded Packaging
6	J C T 600 Ltd	21	Sherborne Upholstery Ltd
7	Pace Plc	22	Switchgear & Instrumentation L
8	George Barker & Co (Leeds) Ltd	23	Robert McBride Ltd
9	Hallmark Cards Plc	24	Yorkshire Building Society
10	Wm. Morrison Supermarkets Plc	25	Princes Ltd
11	Bradford City Football Club Lt	26	Yorkshire Water Services Ltd
12	Provident Financial Plc	27	BorgWarner Ltd
13	Farmers Boy Ltd	28	Hurst Group (Northern) Ltd
14	Optima Legal	29	BASF Performance Products Plc
15	Freemans Grattan Holdings	30	Nufarm Ltd

3.3.8 The majority of public sector employers are located in Bradford city with Airedale and South Bradford less reliant on the public sector. Public sector employment is set to reduce in the near future as public sector finances are subject to government spending cuts.

3.3.9 Figure 3.3 shows the comparison between Bradford and Leeds City Region (LCR) in terms of the proportion of businesses by industry sector. It shows that Bradford has a higher proportion of businesses in distribution (wholesale and retail trade), hotels and catering; manufacturing and the public sector (including public administration, education, health and social work activities) compared to LCR. Bradford has a lower proportion of construction, finance, insurance and business, and transport, information and communications businesses.

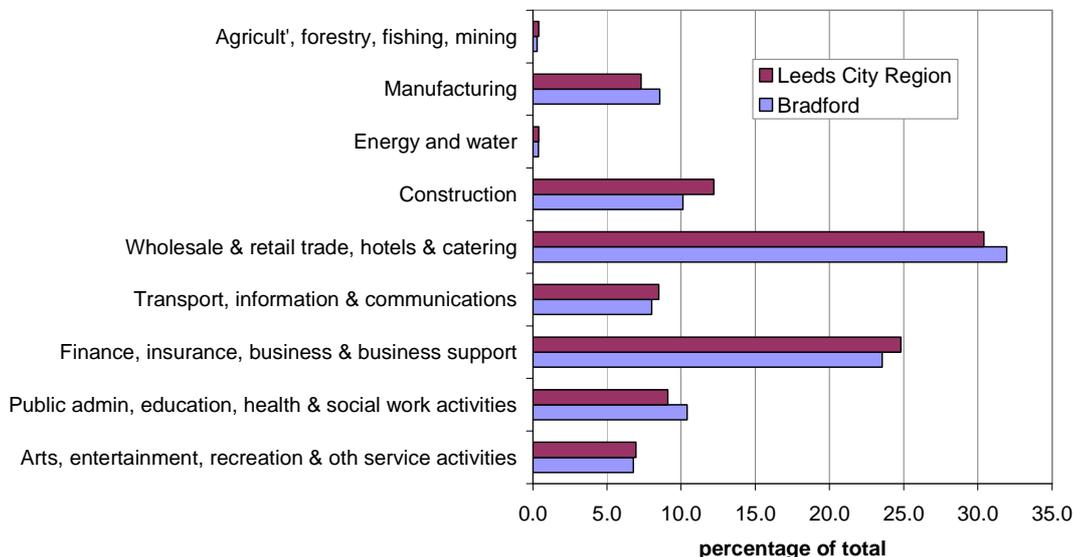
3.3.10 The graph shows how Bradford's economy strongly reflects that of the wider city region and emphasises its economic role as the second largest economy after Leeds. It also demonstrates the district remains an important location for financial

and business services, a key sector for the city region alongside distribution and manufacturing.

Table 3.1

Percentage of businesses by broad industry group

Source: Annual Business Inquiry 2008,



3.4 Sub-District Analysis

3.4.1 Table 3.2 shows how employment across industry sectors varies across the district looking at the five pre-election parliamentary constituencies. Bradford West has the highest number of jobs accounting for one third of all jobs in the district. This is mostly due to the city centre being located in Bradford West. Bradford South has the lowest employment level but has the highest proportion of manufacturing employment and also has a strong transportation and storage sector. Manufacturing is spread pretty evenly across the district whilst public sector jobs are more unevenly spread and are particularly low in South Bradford.

Industry	Bradford District	Bradford North	Bradford South	Bradford West	Keighley	Shipley
Manufacturing	25,886	4,562	6,484	4,875	5,162	4,803
Construction	6,993	1,786	1,335	1,033	1,607	1,232
Wholesale	10,161	3,130	1,886	1,771	2,057	1,316
Retail	22,243	4,123	4,665	6,773	4,130	2,552
Transport & storage	6,117	1,324	1,835	1,442	1,001	515
Hotels & restaurants	9,249	1,982	1,271	2,286	1,873	1,836
Information & communication	5,223	837	225	3,228	395	537
Finance & insurance	7,410	2,844	404	2,190	404	1,568
Property	2,833	1,051	181	661	402	538
Professional & scientific	11,476	5,027	714	2,428	1,820	1,486
Business administration	11,809	2,285	1,204	5,861	1,216	1,243

Education	22,856	4,119	2,814	10,094	2,537	3,293
Health	26,978	3,080	2,681	11,264	6,332	3,621
Public administration & other	17,591	4,621	1,171	6,618	2,102	3,079
Total	192,925	42,224	27,793	62,642	31,858	28,158
Source: Annual Business Inquiry, 2008						

3.5 Entrepreneurship and business start-ups

- 3.5.1 The number of enterprises (VAT and/or PAYE registered) in Bradford grew by 560 between 2005 and 2008 (+3.7%). The recession brought this growth to a halt and between 2009 and 2010 there was a fall in stock in Bradford (as well as across the region and country). The rate of decline in Bradford was, however, greater than both the regional and national average rates of decline.
- 3.5.2 During 2009 there were 1,630 enterprise start-ups, a start-up rate of 11.1% of active stock compared to 10.1% nationally. However, closures outnumbered start-ups leading to a decrease in stock. At the start of 2010 there were 15,180 active VAT and/or PAYE enterprises in Bradford district compared to 15,720 at the start of 2009.
- 3.5.3 Bradford's one year business survival rate at 92.9% (ie the percentage of all new businesses that survive for at least one year) compares very favourably to that of the region (90.7%) and country (92.0%). The district's three year survival rate at 61.8% is however significantly lower than the national rate (66.2%).
- 3.5.4 VAT/PAYE enterprise data isn't available yet for 2010 but recent Banksearch data shows 21.2% more businesses started up in Bradford during the first eleven months of 2010 compared to the same period in 2009. This was a faster rate of increase than in England where company formations rose by 14.6% over the same period.
- 3.5.5 Slightly over one fifth (1,773) of all businesses (8,199) formed over the past couple of years in Bradford were in business services – according to BankSearch data. The second most common sector for new business start ups was personal/community services (15.5% of the total) followed by the retail sector with 1,153 or 14% of the total. Construction also had a large number of start ups at 996. Industries with low numbers of start ups included manufacturing motor trades and computer services.
- 3.5.6 Bradford's economy is a low value economy as illustrated by GVA (Gross Value Added) figures for the district in comparison to regional and national GVA figures. These figures show that Bradford's output per head in 2008 (the latest date for which data is available) was £15,483 compared to £17,149 for the Y&H region. In addition Bradford's share of the region's economic output has been in decline since 2001. Annual growth rates in output did improve briefly between 2005 and 2007 but declined in the following year to 2008. Bradford ranks 309th out of 379 localities in the UK Competitiveness Index 2010 and ranks 37th of the UK's 43 largest cities. Across a range of competitiveness indicators, Bradford ranks consistently in the lower quartiles.

3.6 Summary

- 3.6.1 Bradford's economy is a low value economy when compared to regional and national output figures. Bradford's share of the regional economic output has fallen consistently since 1995 although growth rates have improved since 2005. Productivity levels are on a par with regional levels but are low against comparable cities. The economy must address challenges that have developed over the long term as well as the shorter term impacts of the recession.
- 3.6.2 Bradford is home to a number of major UK businesses and has a range of large and small businesses that continue to perform well in a wide range of sectors with strengths in financial services, retail distribution, engineering, printing and chemicals. The value of business services and finance has grown and this sector is now the largest contributor to the district's GVA closely followed by public sector activities which have also grown significantly since 1995. The value of manufacturing output as a proportion of total GVA has fallen since 1995 although it has shown some improvement in recent years. However, overall competitiveness performance compared to other major cities within the UK is weak reflecting low skills, low productivity in some sectors and low business densities.
- 3.6.3 The largest employers are spread across the district but are concentrated in the Bradford urban area but are largely absent from the city centre. The recent move into the city centre by Provident Financial suggests that there is scope to reverse the trend of recent decades for big employers to relocate to peripheral out of centre locations. The city centre remains the prime location for office based employment in the district.
- 3.6.4 Bradford has seen strong growth in business start ups which have exceeded regional rates and shows there is scope for future employment growth. Knowledge based businesses such as financial and professional services are the key to future growth and the majority of new jobs will be created in a small number of key service sectors that are already well represented in Bradford district. Other sectors such as advanced manufacturing, environmental technologies and digital and creative industries have the potential to be a key future growth sectors.

4 BRADFORD DISTRICT PROPERTY MARKET

4.1 Introduction

4.1.1 Despite the recession some large developments have been completed in the District and there are schemes currently underway. This section provides a locational overview on the current situation regarding commercial and industrial development throughout the District and includes details of some of those recently completed commercial and industrial schemes. It includes a review of the supply and range of existing premises and new developments, assessing how the principle centres in the District perform and comments briefly on the future market potential of the main commercial hubs within the District. It also considers how the allocation of employment land should be approached in the large rural hinterland to the west of Bradford city centre.

4.2 Bradford's Office Market

Bradford City Centre

4.2.1 Bradford City centre has seen very little office development since the completion of 'No 1 The Interchange' in 2006 and no speculative office development has been undertaken. The latest pre-let office development is at Southgate where Provident Financial has taken occupation of 120,000 sq ft of design and build grade A offices.

4.2.2 Bradford's new City Park will be complete by the end of 2011 and the work to relocate the Magistrates court is ongoing, but with restrictions in funding the short term deliverability of this scheme is in question. In the longer term there is a desire to promote Bradford city centre as a destination for office occupiers rather than the outer areas of the city which has been the preferred location for HQ office developments during the last 15 years.

4.2.3 Bradford has always promoted itself as offering a viable alternative to Leeds in terms of office rents. At the height of the boom this may have been the case, but with the recession and the introduction of empty property rates there has been an increase in the incentives offered by landlords in terms of extensive rent free periods and also reductions in headline rents to secure tenants. This will have a knock on effect for the Bradford office market and promoting Bradford over Leeds due to cost may not now be a sound strategy.

Shipley

4.2.4 Shipley and Saltaire continue to attract office occupiers, particularly those involved in hi value activities.

4.2.5 GMI Construction has taken the Waterfront building in Saltaire and this property is now home to the Advanced Digital Institute and a number of hi tech businesses adding to the presence of Pace PLC.

4.2.6 Close to the Waterfront building on Jane Hills in Saltaire, the development of new offices has just begun for Ortho Care UK Ltd a specialist supplier of orthodontic equipment. The company are moving from the outskirts of Bradford city centre to Saltaire demonstrating that the Aire Valley corridor is the location of choice for hi tech companies.

4.2.7 The Council lead project to develop the Buck Lane site will provide opportunities for office occupiers who cannot find suitable premises closer to Shipley town centre. As part of the Canal Road corridor the proposed redevelopment of a site adjacent to Shipley station on Crag Road will also provide opportunities for office occupiers.

Bingley

4.2.8 With the demise of Bradford and Bingley bank during the credit crunch, the reduction in their workforce and relocation to a site in Crossflatts Bingley now has a much reduced level of office based employment in the town centre. The B&B head office is now vacant and is due to be redeveloped for a Sainsbury's supermarket.

4.2.9 At Wagon Lane on the outskirts of Bingley, Emerald Group Publishing is currently expanding their operation into a new build office block. Emerald are publishers of academic journals and texts and also relocated from the outskirts of Bradford to the Aire Valley, once again demonstrating this is the location of choice for many of the District's companies involved in high end activities.

4.2.10 The Coolgardie site on the outskirts of Bingley town centre still offers a prime development opportunity for a mixed use scheme, but with current levels of demand and depressed land values it is likely to be some time before this site is brought forward.

Keighley

4.2.11 Demand for large areas of modern office accommodation in central Keighley will never be high. There will be requirements from local businesses who need to be located in the town centre for operational reasons, but beyond that the largest occupier of accommodation is the public sector. There has been very little movement in the rent levels of offices in Keighley town centre over the past 5 years, with rents of £7-8 per sq ft being achieved.

4.2.12 Central Hall on Alice Street has recently been redeveloped and is operated by Keighley Voluntary Services. The property provides small office suites, largely occupied by third sector organisations such as charities, support organisations etc. Despite only being open since the beginning of 2011 demand for their units has been buoyant and the property is almost fully occupied, demonstrating there is a requirement for small offices in the town centre. The Town council are also currently on site with a project to redevelop the old police station on North Street to provide a Civic Centre including some small offices to let.

4.2.13 The former Leeds City College premises will provide a town centre redevelopment opportunity which could include an element of office accommodation within a larger mixed used development.

4.2.14 On the outskirts of Keighley in Silsden and Steeton there have been number of small business units developed which are suitable for office use. These offer good road communications and also the opportunity to purchase freeholds at reasonable prices, an option not readily available in Keighley town centre.

4.2.15 The AV1 site adjacent to the Aire Valley trunk road also offers an opportunity for the development of small out of town business units. There is also an extant planning permission for a development of a number of business units on a site on Dalton Lane.

Ilkley

- 4.2.16 Ilkley has seen little development of modern office accommodation, but there is a requirement for an increase in the supply of office accommodation in the town centre. The Tesco redevelopment will free up a town centre site which should be used as an opportunity to deliver more modern developments to meet latent demand from local companies.

4.3 Bradford Industrial Market

Bradford

- 4.3.1 Over the last five years there has been a limited amount of new build industrial and warehousing accommodation, but Bradford's stock has been increased dramatically with the completion of a new 1,000,000 sq ft distribution warehouse by Prologis for Marks and Spencer's.
- 4.3.2 This is a once in a lifetime development and whilst there are further plots on Pro Logis Park they are of a much smaller scale.
- 4.3.3 On New Lane, Marrtree have developed the Wellington Business Park, an estate of 7 B1 units in the Laisterdyke area of the city and these are now 70% occupied. Work has also just started on a 30,000 sq ft factory on the Council lead Food Technology Park. This is due for completion in late 2012.
- 4.3.4 Reuse of larger properties continues and these will provide a supply of properties suitable for industrial uses. There are currently two large properties available on Sticker Lane which when combined could provide a large redevelopment site or a relocation opportunity for a large company wishing to expand.
- 4.3.5 On Burnham Avenue Landmark Developments are currently developing a new factory for Weidenhammer UK Ltd. Once completed Weidenhammer's current property to the west of the city centre will be available for redevelopment.
- 4.3.6 Rents for modern industrial property range from £4-7 per sq ft, with the highest rents being achievable on smaller units.

Keighley

- 4.3.7 The reuse and redevelopment of larger properties to provide units more suited to present day demand are occurring throughout the district. Developments of note include the former Magnet factory in Keighley which, following a redevelopment scheme by Opus Land, now provides units of varying sizes for expanding Keighley companies.
- 4.3.8 Also in Keighley the former Silentnight bed factory is now known as Acre Park and provides units across a wide range of sizes.
- 4.3.9 The former Ponden Mill HQ property in Keighley is currently vacant and on the market and offers another redevelopment opportunity.

Shipley

- 4.3.10 In Shipley there has been some redevelopment of former mill sites along Otley Road. Part redevelopment for roadside uses such as a small supermarket and a motorcycle showroom has been completed. Once the market improves the remainder of the site offers an opportunity for employment purposes.

4.3.11 The current development pattern demonstrates that whilst speculative development has slowed since the credit crunch, there are expanding companies in the district who have a requirement for more modern premises and where suitable land or premises are available these developments will come to fruition.

Rural Hinterland to the West of the District

4.3.12 The west of the District is dominated by small settlements protected by green belt policy and providing opportunities for rural living. Settlements such as Cullingworth, Denholme, Wilsden, Clayton, Thornton, Oxenhope, Oakworth have long histories, but experienced rapid growth following the arrival of the railways in the late Victorian early Edwardian period.

4.3.13 The railways linked these smaller settlements and enabled development of mills employing local residents as raw materials and completed products could be shipped quickly and cost effectively.

4.3.14 These railways were closed in the 1950s and 60s and movement of goods moved to roads. Whilst the road networks were poor, traffic levels were low and with no motorways even large cities offered no advantage in terms of transport links.

4.3.15 Over the years road links have improved, demand for products from the mills has declined and companies have vacated these properties. Some have been converted for other uses, others have been demolished and redeveloped.

4.3.16 The general UDP policy is to protect employment sites, unless they can be shown to be functionally redundant. Employment land in the rural hinterland is under constant pressure for developments for alternative non employment uses such as housing. It is important to consider each site on its merits and not release all employment land as there is a danger each of these settlements will become commuter towns with no employment opportunities for local residents

4.3.17 Employment uses are wider than office and industrial uses and sites for leisure, hotels, nursing homes and retail will be required in the future, employment land should continue to be protected. Enabling uses on parts of sites and mixed uses should be considered if higher value uses can deliver employment uses.

5.0 CURRENT EMPLOYMENT LAND SUPPLY IN BRADFORD DISTRICT (2011)

5.1 Introduction

5.1.1 This section provides an update on the supply of employment land within the District. It identifies the remaining sites allocated in the Replacement Unitary Development Plan together with vacant sites with extant planning permissions for commercial or business use developments. This section also assesses the potential of the traditional historic industrial areas within the District to attract new inward investment.

5.2 Allocated Employment Land in 2011

5.2.1 As of 1st April 2011, 120.90 hectares of employment land remained undeveloped from the existing employment sites allocated within the Replacement Unitary Development Plan of 2005. This supply of land was made up of a total of 56 sites of varying sizes, located across the District. 26 sites were less than 1 hectare in size, 24 were between 1 and 5 hectares and 6 sites were greater than 5 hectares. In Bradford North there were 16.37 hectares of employment land comprising of 8 sites, two of which were on the edge of the urban area. The remainder were concentrated in the inner urban areas. Bradford South provided 19 allocated sites amounting to 49.08 hectares. However, only two sites in this constituency were above 5 hectares in size although the M606 corridor to the south of the city provides a stimulus for future inward investment. In Bradford West 5 sites provided 10.85 hectares, Keighley 23.29 hectares on 14 sites and in Shipley, 10 sites provided 21.31 hectares.

5.3 Potential Additional Employment Land

5.3.1 The Council's employment land register also contained a number of unallocated employment sites which had planning backing through the granting of planning permission for 'B' Class business uses. There were 17 sites in total providing a total a further 13.48 hectares of potential employment land. Most of the sites were relatively small. 13 were less than 1 hectare in area, 3 were just above 1 hectare and only one, at Queensbury in Bradford South, was 5.15 hectares. In Bradford North, 5 sites provided 3.81 hectares; in Bradford South 6 sites provided 3.79 hectares and in Bradford West, 4 sites provided 4.67 hectares. In Keighley there was one site measuring 0.48 hectares and in Shipley, one site of 0.73 hectares had permission for employment uses. There is therefore the potential for 134.38 hectares of land that can be brought forward for development for employment purposes.

5.4 Historical Take-up

5.4.1 Between 2006/7 and 2011, the main take up of employment land has largely been in Bradford South, centred along the M606 corridor. This take up comprised 44 hectares at Staygate, at West Bowling golf course and at Euroway Industrial Estate. In addition, 13.6 ha of land were developed in a variety of other sites in Bradford South, 3.4 ha in Bradford North and 8.76ha in Airedale where the main development covered 5.5ha at Hainsworth Road in Silsden. In Ilkley 1.25 hectares at Backstone Way had been developed leaving only 1.03 ha of employment in this Principle Town. In total, 71 hectares had been built out in this period, a rate of about 14 hectares per annum. As in previous years, take up is

characterised by peaks and troughs which can be explained partly by the development of the larger sites in the portfolio.

Table 5.1: Employment Land Supply 2011

Total available land in the District:		134.38 ha
Total allocated land in the District:		120.90 ha
Total unallocated land in the District:		13.48 ha
Total Land available in:		
Bradford North	13 sites	20.18 ha
Bradford South	25 sites	52.87 ha
Bradford West	9 sites	15.52 ha
Keighley	15 sites	23.77 ha
Shipley	11 sites	22.04 ha
Total:	73 sites	134.38 ha

Total Allocated land available in:		
Bradford North	8 sites	16.37 ha
Bradford South	19 sites	49.08 ha
Bradford West	5 sites	10.85 ha
Keighley	14 sites	23.29 ha
Shipley	10 sites	21.31 ha
Total:	56 sites	120.90 ha

Total Unallocated land available in:		
Bradford North	5 sites	3.81 ha
Bradford South	6 sites	3.79 ha
Bradford West	4 sites	4.67 ha
Keighley	1 sites	0.48 ha
Shipley	1 sites	0.73 ha
Total:	17 sites	13.48 ha

**Table 5.2: Employment Land Supply (Hectares) at 1 April 2011
(Sites Allocated in RUDP)**

	Total Area	Number of Sites	Sites < 1ha	Sites > 1ha	Sites > 5ha
Bradford North	16.37	8	5	2	1
Bradford South	49.08	19	7	10	2
Bradford West	10.85	5	3	1	1
Keighley	23.29	14	6	7	1
Shipley	21.31	10	5	4	1
Total	120.90	56	26	24	6

Table 5.3: Windfall Employment Land (Hectares) at 1 April 2011

	Total Area	Number of Sites	Sites < 1ha	Sites > 1ha	Sites > 5ha
Bradford North	3.81	5	4	1	0
Bradford South	3.79	6	5	0	1
Bradford West	4.67	4	2	2	0
Keighley	0.48	1	1	0	0
Shipley	0.73	1	1	0	0
Total	13.48	17	13	3	1

5.5 Deliverability Issues of Employment Sites

5.5.1 In terms of raw figures based on take up for the last 5 years against current supply there appears to be ample supply of employment land. Unfortunately this is a very crude analysis as the shortage of good quality development sites in the District results in a relatively low take up figure. Ongoing work is needed to ensure well located, serviced sites are coming to the market on a regular basis.

Bradford Urban Area

5.5.2 The development of Prologis Park on a 35 hectare site demonstrated that sites in the right location will eventually be developed. The supply of employment land in the District must be made available in areas where business wants to be located. Recent developments in Bradford (Pro Logis, Weidenhammer, Food Park and Wellington Business Park) have shown this is to be the south and east of the District as they have the best access to the main motorway network.

5.5.3 Demand for sites to the west of Bradford city centre is not as buoyant and the relocation of Weidenhammer to South Bradford demonstrates that this may no longer be the area of choice for large companies.

5.5.4 Opportunities to the south of the city centre on vacant green and brownfield sites are few and far between, but windfall sites offer development opportunities in this area.

5.5.6 The area around Bowling Back Lane is still a traditional industrial area of Bradford with a wide range of properties in terms of age and size. Redevelopment has taken place as older properties have become vacant, but many of the properties are still of very poor quality.

5.5.7 In terms of future development opportunities this area should be seen as a priority. It offers some very large sites with good access to the main arterial routes. An element of site assembly will be required to benefit from the opportunities offered.

5.5.8 The Canal Road Corridor project will offer up sites which may be suitable for employment uses. These will be required to complement the existing stock and provide opportunities for new residents.

Aire Valley

5.5.9 This area will continue to attract office based companies who do not rely on fast road connections. Canal and riverside properties are attractive to hi tech

companies and their staff and give a good company image. The rail networks along the Aire valley are excellent and this reduces the need to commute by car. Canal towpaths offer the opportunity to commute safely by cycle. The area is also convenient for access to Leeds Bradford International Airport and it is important this benefit is promoted.

Keighley and Ilkley

5.5.10 In Keighley development should continue to be encouraged on sites which offer the quickest access to the Aire Valley trunk road. Areas such as Royd Ings Avenue in Keighley and the smaller centres of Steeton and Silsden should be seen as the location of choice for expanding companies to build on the redevelopment which has taken place recently. A supply of employment land in Ilkley should be maintained to provide opportunities for indigenous companies wishing to expand.

Rural Hinterland

5.5.11 Economic activity in the rural areas needs to be assessed and opportunities to increase this activity capitalised on. The rural hinterland is home to small scale smallholdings and farming operations – generally sheep farms with some cattle, but this serves a local market as the farms are often too small to provide adequate income for a profitable business to operate. Agriculture is often supplemented by alternative sources of income and farmers should be encouraged to diversify. Diversification activities may be farming related such as food production and processing or farm shops, through to small scale production of other products. Consideration should also be given to the potential of the leisure market. UK holidays are still popular and holidaymakers need accommodation. This ranges from B&B and guest house operations through to self catering cottages in converted farm outbuildings.

5.5.12 Caravan and camping holidays have seen year on year growth for the last 5 years and this shows no sign of subsiding, particularly in tough economic times. With minimal investment rural land owners can become operators of caravan and camping sites which increase the level of sustainable rural employment. Outdoor activity centres, horse riding facilities, livery stables and the like should all be considered as suitable employment uses in the rural areas and promoted, with applications for such uses treated favourably. These uses should also be considered where protection of employment sites is preferred.

5.5.13 In order for these changes in rural employment to be encouraged a supply of employment land in rural areas should be maintained, but concentrated on settlements with larger populations and better access to neighbouring towns and cities. In the smaller settlements allocations should be removed to leave unallocated sites with each application being dealt with on its merits.

5.5.14 A supply of employment land in the rural hinterlands will go some way to alleviating problems when enforcement becomes necessary against unlawful operations from unsuitable properties – in particular businesses operating from residential properties. Whilst planning enforcement is required to prevent unauthorised operations, it should not be a process which results in businesses being closed down. Enforcement officers should be in a position to offer assistance in finding valid alternative premises from which businesses can operate. If there are no premises locally this demonstrates a lack of supply which needs to be met and protection of employment land in the larger settlements will provide these opportunities.

6.0 FUTURE ECONOMIC AND SPATIAL CHANGE IN BRADFORD DISTRICT

6.1 Introduction

6.1.1 Chapter 6 previously set out the potential future economic profile of the District up to 2016 as a result of recent economic changes and regeneration initiatives. This update takes the period further until 2028, the life of the Local Development Framework.

6.2.2 Bradford continues to have ambitions for significant change and economic growth as demonstrated by the transformational regeneration schemes in the city centre and elsewhere across the District. This section demonstrates how the local and strategic policy framework is placed to achieve such transformation. It also examines the economic sectors that were expected to grow and the resulting impact on the needs of local businesses based on an unconstrained growth scenario.

6.2 Status of Regional Planning Policy (RSS)

6.2.1 The final version of the Regional Spatial Strategy was adopted and published in May 2008. It sets the strategic context and policies for the Yorkshire and Humber Region and the policies of the LDF for Bradford must conform to these wider principles. The RSS document still forms part of the Development Plan for the District together with the saved policies of the Replacement Unitary Development plan.

6.3 Economic Policy Aspirations

Ambitions for Growth

6.3.1 Bradford has aspirations for transformational change. The Bradford District Economic Strategy seeks to strengthen Bradford's position as key element of the Leeds City Region economy, as the second biggest economy after Leeds. Collaboration between the two districts on the Leeds/Bradford corridor is creating opportunities for investment and development. Bradford will look to build on other economic relationships within the city region and beyond that do not reflect traditional administrative boundaries, such as common labour markets with Kirklees and Calderdale to the South and Skipton and Craven to the North.

6.3.2 Within the challenging climate of the recent recession Bradford has continued to deliver a steady stream of wealth creating projects. The new Pro Logis £67m logistics warehouse for Marks & Spencer has been a massive boost to confidence attracting further logistics investment in the surrounding area. The city centre has continued to deliver steadily with City Park well on its way, new investment in a headquarters building by Provident Finance Group and a new 200 bed hotel by Jurys Inns.

6.3.3 The economic strategy aims to support the transition of the district from recession to recovery. It is designed to reflect the policy imperative for a transition from public to private sector employment, and the transition from public to private sector intervention in some areas of economic support.

6.3.4 Growing private sector jobs is a major economic challenge for the district. Public spending in Bradford district is likely to reduce by more than £1 billion over the next four years. It is likely the recently announced cuts in public spending will

result in the loss of around 5,000 public sector jobs across the district. Replacing these jobs will require new approaches and innovative solutions with public agencies working alongside private business to generate business growth that will create employment for local residents. Bradford will also need to build on a strong

culture of enterprise that saw the district generate the fastest growth in self employment of any local authority in the UK over five years to 2010.

- 6.3.5 The growing population of the district is an asset to employers both locally and across the wider city region. A growing population in of itself generates new markets, economic opportunity and employment. However it is important that the workforce is equipped with the most appropriate skills and knowledge to access the opportunities available. Between 2011 and 2026 forecast growth in full time equivalent employment is set to be 14.6%, almost twice forecast regional growth of 7.7%.

Innovation, Enterprise and New Business Growth

- 6.3.6 Bradford still has a relatively high number of business start-ups compared to other authorities in the region. It will be important for Bradford to provide the necessary business infrastructure to support maturing small and medium sized enterprises. This includes provision of grow on premises and varied work space to allow for relocation to meet changing needs.
- 6.3.7 Within the district the outlying settlements in Wharfedale and Airedale have an important role to play in providing the necessary infrastructure to support small businesses from start-up through to graduation. Airedale is already the location for Keighley Business Centre and Aire Valley Park. There are further plans for other small business spaces such as Dalton Innovation Centre, Keighley Gas Works site and incubator units at Bingley Technology Business Park.
- 6.3.8 In towns such as Ilkley and Burley in Wharfedale, and Keighley and Bingley in Airedale the provision of work/live units and graduation space could support the successful small businesses and niche industries located in these areas. This is already the location of a number of small business owners and would take advantage of entrepreneurship opportunities in Wharfedale and Airedale.

Future Challenges

- 6.3.9 The vision of transformational economic change in Bradford still presents a number of challenges for the district. Regional ambitions are for significant growth in housing and employment. This will need to be met through the allocation of appropriate sites to deliver against the regional targets. There is likely to be increasing competition between housing and employment uses for the strategic and popular sites. The pressure of demand for housing land will need to be considered in the employment strategy, particularly in relation to the safeguarding of strategic employment sites. The approach recommended by the RSS is for a varied employment land portfolio with a choice of sites and it supports the safeguarding of strategic sites that meet requirements of the growth sectors.
- 6.3.10 Bradford district's economy is made up of a number of different functional economic areas. Each of these areas makes up a distinctive economic space, with different characteristics, influences and flows. The city centre, at the heart of the Bradford City functional economic area, is the key economic driver for the district. Bradford's city centre has been suffering from market failure. Its retail

offer is limited and its central business district needs recreating to appeal to 21st century businesses and attract new investment. Recent action and investment on the ground has been focused on improving the quality of the public realm, including the City Park. This will act as a catalyst for a new central business district by raising land values and encouraging investment. Creation of a new central business district will bring transformational change for businesses, investors and Bradford citizens. Key steps have already been taken including assembling land, putting in place the planning and design framework, agreeing a commercial strategy, and preparing business cases. Delivering a development platform and subsequent Grade A office accommodation is a priority for the city centre. Of the other functional economic areas, Airedale in particular is a significant centre for business and employment and a driver of the district's prosperity. Airedale's offer, centred round Keighley, Bingley and Shipley incorporates quality residential locations with space for business and investment activity.

6.3.11 Bradford's traditional manufacturing and industrial sectors will still account for a significant proportion of the districts employment. The challenge will be to reconcile employment land demands from this sector with high quality sites required by the office based growth sectors. Regional and local economic policy focuses on the growth of the financial and business regional priority clusters without planning for future requirements from Bradford's established industrial base. Therefore, the strategy for allocation of employment land will need to consider the requirements from Bradford's existing industrial base (particularly medium sized companies) in addition to meeting the policy requirements for growth sectors and small businesses. This includes provision for low quality, low value sites to meet the demands of the manufacturing and industrial sectors including grow on space for expanding businesses.

6.3.12 The skills issue is also an important consideration across the district as there is a risk that an under-skilled workforce will not be able to support Bradford's transformational change.

6.3.13 Stakeholders interviewed for this study raised concerns that the skills agenda was not sufficiently addressed in the district. This included concerns over recruitment difficulties in the labour market due to variation between local workforce skills and employer requirements. Sectors currently facing this issue include construction, property development and cross sector managerial skills. Given these issues, it is likely growth in employment will be met in the short to medium term by skilled workers being drawn in from outside the district.

6.4 Current Spatial Strategy

6.4.1 The RUDP generally distributed an allocation of 130 hectares employment land fairly evenly across the District including peripheral locations as a policy of maintaining sustainable settlements. The Regional Spatial Strategy has moved away from this principle with development prioritised in urban centres. The main settlements in the District to focus economic growth are Bradford, now classified as a regional city, and the principle towns of Ilkley and Keighley. Transformation of Bradford with increased growth in economic development will come through the renaissance of the City centre and regeneration elsewhere. The principle towns will form the main focus of development in rural areas, strengthening their service centre roles. The RSS also specifically encourages growth in the south of the District, the M606 corridor, in Airedale and in the Leeds – Bradford

corridor. Bradford is still the focus for new development including housing, retail, leisure services and employment with the principle towns as secondary locations after Bradford.

6.4.2 This policy direction puts the onus on brownfield development in the urban areas. Office developments should be located in the city centre with other industrial and commercial activities directed towards established employment areas within the greater Bradford urban area and around Keighley and Airedale. The larger settlements of Silsden and Steeton can potentially play an important role in providing a mix of housing and employment and development in these locations should consider the means by which they compliment Keighley. Ilkley and Wharfedale will need to plan for employment land to meet demand for small to medium high value, high quality enterprises.

6.5 Priority Regeneration Areas

6.5.1 Key Policy documents such as the Community Strategy and Bradford's Economic Strategy promote future development in the Districts priority regeneration areas. These areas are::

- Bradford City Centre
- Airedale
- Canal Road Corridor
- Leeds – Bradford Corridor
- Traditional industrial hubs such as Bowling

6.5.2 It is these areas which local strategies identify as having the greatest potential for attracting new inward investment, retaining existing employers and are the locations that make important contributions to employment land supply. There are a range of regeneration proposals in the pipeline which will provide high quality office accommodation, the regeneration of older industrial areas, and opportunities for new industrial developments. These schemes may result in the relocation of the older low quality 'bad neighbour' type uses which are important to the local economy and should still be retained within the District.

6.5.3 The city centre remains the priority regeneration area for the District and its success is pivotal to the prosperity of the whole city and the district overall. The completion of the City Park will improve the public realm around City Hall, acting as a catalyst for the development of a new central business district which will encompass the proposed New Victoria Place development and build on the recent Southgate development which is now home to Provident Financial's Head Office.

6.5.4 In addition The Westfield Shopping Centre will be able to accommodate office accommodation in subsequent phases. These two locations are the priorities within the city centre and new developments in these areas will offer opportunities for reuse of sites in other areas.

6.5.5 Outside the city centre, the Canal Road corridor has been identified as an area for regeneration to provide mixed use schemes from Bradford City centre to Shipley. Airedale has a number of previously undeveloped allocated employment sites offering opportunities for modern new build accommodation. Reuse of sites in Keighley will continue to provide accommodation for local

companies and businesses will continue to be attracted to the rural, yet well connected, town of Silsden.

- 6.5.6 The Leeds-Bradford corridor will tie in developments in the north and east of Bradford to north and west of Leeds to ensure they compliment each other and provide opportunities for businesses.
- 6.5.7 Since the demise of the textile industry, the East Bowling area of Bradford has become the home to 'bad neighbour' uses such as heavy industrial manufacturing, foundries, metal working, waste transfer and vehicle scrap yards. Whilst these are the less desirable operations, they are to be expected in a large city and this area should be considered the priority location for the provision of sites for such uses.

6.6 Regeneration Proposals – Future Challenges

- 6.6.1 An analysis of these proposals highlights the focus on the delivery of high grade office space in the city centre and the provision of quality industrial development in Airedale and in peripheral sites. The future allocation of employment land will need to consider the amount of office space that will be required and where it is best located, taking into consideration the guidance in PPS4 which places pure office development in centres. The strategy will also need to consider the demand for the types of industrial land and how much should be allocated to the regeneration priority areas and how much should be allocated in other sustainable locations. There are currently few sites allocated within the City centre and the Canal Road corridor. Most of the allocated sites in south Bradford and the M606 corridor have been developed.

7.0 PROJECTED DEMAND FOR EMPLOYMENT LAND

7.1 Introduction

7.1.1 This section quantifies possible future demand for employment land based on (i), the Council's employment land monitoring returns and (ii), on Regional Econometric Modelling data which forecasts change in employment within a range of industrial sectors across the District. The latter is the preferred method as it provides a consistent view of employment change across the region using a complex variety of inputs and considerations resulting in a more robust output. The historic take-up rates from monitoring returns nevertheless provides a broad parameter within which to refine a demand calculation.

7.2 Employment Land Monitoring Returns

7.2.1 The use of historic take-up rates for land developed for employment uses has certain limitations in its application but it does provide a general guide on past trends and gives a broad geographical indication of the preferred locations for business investment. In the early years the data does not take account of losses to other employment uses. More recent data accounts for this but does not differentiate between the specific Business Use Classes, B1a, b, c, B2 or B8.

7.2.2 Take up rates are shown in table 7a for the five parliamentary constituencies for the period between January 1993 and March 2010. All the data was calculated on a yearly basis and recorded as a gross figure relative to site development.

Table 7a: Take-up of Employment Land: January 1993 – March 2010

Constituency	Developed Employment Land (Hectares)
Bradford North	72.22
Bradford South	110.92
Bradford West	17.25
Keighley	36.70
Shipley	15.40
District Total	252.49

Table 7b: Take-up of Employment Land, Mar 2006 – Mar 2010 (Recession Years)

Constituency	Developed Employment Land (Hectares)
Bradford North	3.56
Bradford South	45.18
Bradford West	0.48
Keighley	7.92
Shipley	0.00
District Total	57.14

7.2.3 Over the period, 1993 until 2010 the annual average take up of land for employment purposes is 14.85 hectares per annum. The figures for Bradford South are dramatically uplifted by the Pro Logis development at the former West Bowling Golf Course which in 2010 accounted for 22 hectares in a single development. In the absence of this development the figures would have a rounded off average of 13.55 hectares. In a straight line projection to 2026, the total plan requirement would amount to 237.6 hectares at the higher rate or 216 at the lower.

7.2.4 Table 7b presents the take-up of employment land between 2006 and 2010 which were considered as the years when the District experienced the effects of the economic downturn and investment activity was less buoyant. It was in 2010 however when the Pro Logis scheme was substantially completed. Average annual take-up for this period amounted to 14.28 hectares when including the Pro Logis development, or 8.78 hectares if excluded. When these figures are projected to 2026, the potential demand is 229.48 hectares at the higher rate or 140.48 hectares in a less buoyant economy.

Accounting Period	High Rate Projection	Lower Rate projection
Jan 1993 – Mar 2010	237.6 hectares	216 hectares
Mar 2006 – Mar 2010	229.48 hectares	140.48 hectares

7.3 Quantitative Analysis using Yorkshire Forward’s Regional Econometric Model (REM)

7.3.1 The original method undertaken by ARUP in the Employment Land Review was based on transformational growth scenarios derived from regeneration based jobs growth and was indicative of the direction of economic change based on latest trends. Arup in 2006 estimated an annual jobs growth of 4720 between 2006 and 2016 and based the calculation for employment land demand on these figures. The result was a projected net employment land demand for Bradford District between 2006 and 2021 of between 214 and 148 hectares depending on whether there was a constrained or unconstrained growth scenario.

7.3.2 This current update also uses the REM and is based upon ‘full time equivalent’ (FTE) employment in 20 of the various industrial sectors of the local economy. Calculations are based on recommendations from the study undertaken by Roger Tym and Partners in April 2010 entitled, ‘Planning for Employment Land – Translating Jobs into Land’. In line with PPS4 (Policy EC1.2b), employment land provision is based on employment growth targets. This is done by translating employment change by industrial sector (Standard Industrial Classification, SIC) into employment change by land use, office (B1) industrial (B2), or warehousing (B8). To translate future jobs into floorspace for individual employees, Roger Tym & Partners recommends a ratio of 16 sq metres for offices and 67 sq metres for industry and warehousing. For site coverage the study recommends an area of 3,500-4,000 sq m per hectare for industry and warehousing and out of town offices (35% - 40% coverage). It is suggested that for city centre office development, the ratio should be somewhere between 6000 sq m and 14,000 sq m per hectare. All of these ratios are based on surveys of recent developments undertaken in a number of Districts across the Yorkshire Region and presents a more local dimension to the calculations. From the projected number of jobs, the

total site area can be calculated for each Use Class and ultimately the overall employment land requirement for the District.

- 7.3.3 To illustrate the variation in the process, a range of calculations have been produced which compare a number of growth scenarios. The first is based on a specific REM application carried out using an employment growth projection dated January 2010 and up to 2026. Because of the economic recession the projected jobs growth was extremely low and consequently employment land need was relatively small and did not include the non 'B Class Uses' such as retail, Education and Health services. The employment land requirement was calculated as follows:

Use Classes	Jobs Growth	Density - Hectares
B1 Plot Ratio – 60%	5444	16 m2 – 14.5 hectares
B2 Plot Ratio – 40%	-1348	67 m2 – -22.6 hectares
B8 Plot Ratio – 40%	2090	67 m2 – 35 hectares
Total Land Requirement		26.9 hectares

- 7.3.4 Yorkshire Forward also prepared a specific scenario based on a degree of transformational growth which could be achieved through the completion of both the Bradford Central Business District office development and the proposed West field shopping centre. This calculation was based on all sectors including the retail sector. This indicates only a marginal multiplier effect from the early transformational projects.

Use Classes	Jobs Growth	Density - Hectares
B1 Plot Ratio – 60%	592	16 m2 – 1.6 hectares
B2 Plot Ratio – 40%	90	67 m2 – 1.5 hectares
B8 Plot Ratio -40%	18	67 m2 – 0.3 hectares
Total Land Requirement		3.6 hectares

- 7.3.5 The most recent REM jobs growth projection figures were produced in March 2011 and were calculated until 2026 with a straight line projection until 2028 to include the complete plan period. Details of projected growth are shown in Appendix 3, 'REM Bradford Industries 2007 to 2026'. The model presented a more positive indication of the performance of the local economy with a significant increase in jobs growth, particularly in the general industrial uses, (B2).

Use Classes	Jobs Growth	Density - hectares
B1 Plot Ratio – 60%	8439	16 m2 – 22 hectares
B2 Plot Ratio - 40%	3430	67 m2 – 57 hectares
B8 Plot Ratio – 40%	4482	67 m2 – 75 hectares
Total Land Requirement		154 hectares

- 7.3.6 Based on the Roger Tym & Partners jobs to floorspace ratios, the estimated land requirement for the District until 2028 is around 154 hectares. However across the District there is a considerable vacancy rate within the property market in the supply of office space, industrial land and buildings and in warehousing units. The Quarterly Report of Property Trends in the Bradford District for the period 1st October to 31st December 2010 indicated that at 1st January 2011 there were 133,824 sq. m. of available office space and 467,826 sq. m. of available industrial premises within the Bradford District. However, many of these properties are located in areas where there is little market demand, are isolated from, or have poor access to the Districts infrastructure. Some are in a poor state of repair, are in upper floors with substandard access, have listed building status or cannot be economically converted to accommodate the demands of modern industrial operations. It is estimated that only about 60% of this resource is suitable for the modern market and in terms of investment opportunity, located in the better parts of the District. As a factor of the Districts total property sector, this equates to an office vacancy rate of 7% and for industry, 3.3%. In factoring in these vacancy rates, using assumptions of continued similar vacancy rates for the new projected supply, together with the assumptions about the percentages of vacant land and premises being reused, the net projected demand is calculated as 124 hectares. Alternatively, as the vacancy rate figures are determined through broad generalisations, it is considered acceptable to assume an average vacancy rate of about 5%. In simplistic terms, to factor in a reduction of 5% in the total demand would indicate a requirement of approximately 146 hectares.
- 7.3.7 This figure of 146 hectares lies close to the average of the demand figures in a constrained and unconstrained growth scenario as calculated by Arup in 2007 in their Employment Land Review. Such a target enables the District to plan for improved growth and be flexible enough to provide the right choice of sites to attract new investors in a more buoyant market.

8.0 FUTURE STRATEGY TO MEET PROJECTED EMPLOYMENT LAND DEMAND

8.1 Introduction

- 8.1.2 This section matches demand with supply of employment land in Bradford. The 2007 ELR made recommendations on the strategic role of settlements to bring forward a flexible, varied and quality supply of employment land. This update does not propose to address those assessments as the Core Strategy of the Local Development Framework will set out a series of local objectives and a settlement strategy for the District based on a wider set of indicators and policy objectives.
- 8.1.3 The calculations undertaken by Arup in the 2007 ELR estimated projected demand as between 148 and 214 hectares based on constrained and unconstrained growth scenarios for the District. Section 7 of this addendum shows that there is now a projected demand of approximately 154 hectares of land based on the REM dated March 2011. When the existing supply of vacant land and industrial premises across the District is factored into the projection, the estimated target figure is 146 hectares. The figure is based directly on jobs growth by sector and does not factor in any potential unconstrained growth increases through proposed future regeneration projects. The REM has a sophisticated inbuilt mechanism to provide a reasonably accurate and consistent economic and jobs growth pattern.

8.2 Analysis of Demand

- 8.2.1 These contrasting projections of the ELR and its update have been produced over a relatively short timescale, representing opposite ends of an economic cycle. It would not be acceptable to plan for future economic growth using data from a period too close to either end of the spectrum. It will be prudent to plan for a somewhat unconstrained growth scenario as recommended in the 2007 ELR. The Core strategy proposes a figure midway between the constrained and unconstrained economic projections of 2007, a figure of 146 hectares. This flexibility allows for ambitious economic growth. It also allows for a range and choice of sites and premises to be available at any one time, accommodates land which is currently constrained but deliverable in the long term. A flexible and generous supply increases the prospects that the needs of inward investors or existing businesses in the District can be met as they arise. The need for additional land is further increased by the planned urban transformation and remodelling envisaged in the priority regeneration areas within the District such as the Canal Road Corridor. There is also a need to allow for business displacement and relocation which will result. It will be necessary therefore to identify a portfolio of larger, more strategic sites in locations that would attract new inward investment. A target of 146 hectares of new employment land, representing a figure at mid point between the highest and lowest economic projections in the Employment Land Review is considered a reasonable objective.
- 8.2.2 An analysis of the current supply of employment land was provided in Section 5. It shows that as of 1st April 2011, 120.9 hectares of employment land remained undeveloped from the existing employment sites allocated in the Replacement Unitary Development Plan (RUDP) of 2005. 17 sites totalling 13.48 hectares have extant permissions for employment uses. No form of development has commenced on these sites since 1st April 2011 and consequently none of the

projected demand has already been met; hence the residual projected demand for employment land remains unchanged.

8.3 Analysis of Supply

8.3.1 Section 5 provides a quantitative review of the current RUDP supply and has identified some issues in terms of site size and location, a total of 120.9 hectares of allocated sites. An analysis of the RUDP allocated employment land supply shows the majority of the remaining sites are located in Bradford South constituency, both in terms of site numbers and total area although the remaining 13 hectares of the West Bowling Golf Course site slightly skews the supply figures. With the exception of Bradford West, the sites are fairly evenly distributed across the other constituencies. However, when the recommendations following the site analyses as set out in Appendix 2 is applied, the supply of sites in the District is altered.

Employment Land Supply in Hectares resulting from EDS Site Assessment

KEIGHLEY	
Short term	1.56 ha
Medium	1.52 ha
Long	11.27 ha
Total	15.6 hectares

BINGLEY, CULLINGWORTH	
Short term	10.28 ha
Medium	5.81 ha
Long	0 ha
Total	16.09 hectares

SHIPLEY, BAILDON	
Short term	6.31 ha
Medium	0 ha
Long	0 ha
Total	6.31 hectares

BRADFORD SOUTH	
Short term	14.63 ha
Medium	11.87 ha
Long	2.88 ha
Total	29.38 hectares

BRADFORD NORTH	
Short term	4.47 ha
Medium	2.86 ha
Long	9.85 ha
Total	17.18 hectares

BRADFORD WEST	
Short term	8.44 ha
Medium	2.01 ha
Long	0 ha
Total	10.45 hectares

ILKLEY, STEETON, SILSDEN	
Short term	0.68 ha
Medium	1.03 ha
Long	0 ha
Total	1.71 hectares

SUM TOTAL OF EMPLOYMENT SITES TO BE RETAINED: 96.72 Hectares

8.3.2 As a comparison with the former constituency figures, Keighley has 17.31 hectares and Shipley 22.4 hectares.

8.3.3 In order to understand if further employment land is required in Bradford on supply and REM demand terms only, it is necessary to understand what proportion of the projected demand is already for. This can be derived from:

- Retained RUDP allocated sites 96.72 ha
- Sites with extant planning permission 3.48 ha
- Employment sites under development 0.00 ha
- Total land availability 110.20 ha

8.3.4 The implication for Bradford is that a residual demand of 35.8 hectares of land will be required to meet the projected economic growth scenario for 2028 as set out in Section 7, a target land supply of 146 hectares. The supply of land should be balanced with the sustainability, market demand and settlement strategy for each location. It is likely that demand will originate from B1 uses in the city centre and to a lesser extent the principle towns. As shown in Section 7.3, the main requirements will be for B2 industrial and manufacturing uses and B8 distribution. The focus for these sites should be Airedale, Bradford North urban area and Bradford South. Sites should be identified along the M606/M62 transport corridors where there is continued demand for sites both from new investors and from companies within Bradford. There is scope for intensification of existing employment land at Bowling Back Lane and at Dalton Lane in Keighley.

8.4 Settlement Strategy

8.4.1 The settlement strategy as recommended in the 2007 Employment Land Review will continue to form the basis of the economic development strategy within the Local Development Framework. It will provide the focus for the identification of potential new employment sites in the Allocations Document. The settlement strategy is summarised below:

City Centre

8.4.2 The key employment locations in Bradford and the adjacent Districts and their relationships have not significantly changed since the Employment Land Review

in 2007. Bradford City Centre will be the location for centralised office use with the formation of the 'Business Forest' developed around the new city centre water park. This will be balanced by the construction of the new shopping centre at Forster Square.

Bradford South

- 8.4.3 This is strategically important to the District, with the development of Pro Logis business park and developments in the Euroway Estate and the M606 corridor.

Bradford West

- 8.4.4 This is the location for smaller industrial sites to meet localised market requirements.

Bradford North

- 8.4.5 Bowling Back Lane will continue to play a significant role in Bradford's economy, both for the supply of general industrial sites and through intensification for new modern developments. The interface with Leeds District has been recognised as a location for economic investment in the Regional Spatial Strategy and in this respect, retention of the large site at Gain Lane provides a quality investment opportunity.

Airedale

- 8.4.6 Shipley does not have a ready supply of allocated employment land therefore interventions in Shipley will mean identification of new sites. It is recognised as a transport hub which could provide a stimulus to new investment, building upon the digital industries already located there. Bingley is a popular location for business as demonstrated by the take up at Castlefields Estate and Aire Valley Business Park. The focus for industrial development in Keighley is found along the A629 and A650 corridors with a mix of modern developments and low quality employment sites. Keighley is positioned as a principle town and a second location for development after Bradford. The approach for Keighley should continue as a managed decline for the mix of employment sites located in the south of Keighley and a shift in focus to position the employment offer around the A650 and Dalton Lane area. Steeton and Silsden have experienced considerable new development in recent years for both housing and employment. The business park south of Silsden has now been built out which indicates a buoyant market in this part of the District.

Wharfedale

- 8.4.7 Wharfedale consists largely of commuter settlements and does contain a number of successful entrepreneurs. The focus should be on the delivery of small to medium sized space, possibly using mixed use schemes, attractive to high value, fast growing firms.

Rural West Bradford

- 8.4.8 Historically, the small settlements west of Bradford grew around textile mills, the prime source of employment. With the decline of this sector, the settlements have largely become commuter villages with residents travelling to Airedale and Bradford. Other than small operations to cater for local markets, this part of the District is unlikely to attract the larger investors and operators who require locations or premises closer to the main transport corridors.

Appendix 1:
Site Assessments

ILKLEY,
STEETON &
SILSDON

Site Information									Environmental Issues				Accessibility						Site Assessment											
BMDC Ref	Site Address	Settlement	Size (Ha)	Availability	Regen Area	UDP Status	Planning History	Current Land Use	Adj. Green Belt	Location	Adj. AONB	Adj. Other Environmental Designation	Flood Risk	Site Access	Air	Rail	Bus	Road	Access Suitability	Road Network	Cover	Topography	Local Facilities	Surrounding Area Condition	Surrounding Uses North	Surrounding Uses East	Surrounding Uses South	Surrounding Uses West	Other Information	
Allocated Supply																														
E/KY/08/0014/00		Silsden	0.68	Short Term	Airedale	Allocated														Good	Free Flowing	Grassland	Predominantly Flat	Retail / Restaurant; Railway Station; Bus Stops; Public	Good	Business General Industrial Occupied;	Residential Occupied;	Business Office Occupied;	Road Frontage;	small sliver of land between building society and existing industrial use - only real potential for extrn of existing users -
E/KY/13/0003/00	Land East of Ashlands Road	Ilkley	1.03	Medium	N/A	Allocated	None	Greenfield	N	Class C	N	N	High	Class A	06-10	Excellent	Excellent	Excellent	Good	Free Flowing	Grassland	Predominantly Flat	Retail / Restaurant; Railway Station; Bus Stops;	Good	Business General Industrial Occupied;	Business Office Vacant; Business Office Occupied; Road Frontage;	Residential Occupied; Road Frontage;	Residential Occupied; Road Frontage;	allotments also to east of land appears to be council owned currently open space potentially used as local amenity space close to town centre to use facilities	
E/KY/08/0004/00		Steeton	0.56	Long Term		Allocated													Poor	Free Flowing	Vacant	Predominantly Flat	Railway Station; Bus Stops; Public Parking; Cycle Provision;	Good		Open Countryside;	Open Countryside;	Business General Industrial Occupied;	rail line to north - only suitable as extrn to existing currently vehicle storage area for uses	
Potential Reserve (source: sites deallocated through UDP review process and windfalls)																														
E/KY/08/0015/00		Silsden	13.13	Short Term	Airedale	Inspector Removed													Excellent		Grassland	Predominantly Flat	Retail / Restaurant; Railway Station; Bus Stops; Public Parking;	Good	Business General Industrial Vacant; Business General Industrial Occupied; Business Storage Vacant; Business Storage Occupied;	Open Countryside;	Road Frontage;	Road Frontage;	southern portion flood risk dev would have to be in keeping with nature of surrounding dev mindful of topo and potential impact on open env	

Total UDP supply in Ilkley, Steeton & Silsden (ha)	2.27
Retain (Green) ST	0.68
Retain (Green) MT	1.03
Retain (Green) LT	0
Potential (Yellow) LT	0.56
Deallocate (Red)	0
Potential Reserve (ha)	13.13
Retain (Green) ST	13.13
Potential (Yellow)	
Deallocate (Red)	

Market View			EDS Comments					
Market Significance	Marketability	DTZ Comments	EDS Comments	RUDP Ref	Overall Scale	Size	Type	Distribution
		This site provides expansion land to the existing business park and should be retained as such. The recent development which has been undertaken at the business park has been relatively successful now being fully let. The land is underdeveloped and available for development immediately although it is considered that this site will most likely be developed out in the medium term.	Retain	K/E1.6	Adequate	Adequate	Adequate	Adequate
Local	Class B	There is a question mark over the mature / semi-mature trees on part of the site adjacent to the A65 which if protected may reduce the ability of the site to provide a frontage / profile to the site and may preclude access. There are also trees to the rear of the site. access from Dansk Way on the adjacent business park seems to be precluded by the existence of existing surface level parking. Access from Ashlands Road, which is residential in nature is not entirely appropriate. The provision of an access solution to the A65 would most likely prove to be too expensive. There are two rows of terraced housing in the south west corner of the site which we feel detract from the marketability of the site. Nevertheless, this is only remaining employment allocation in the town. Further work as to an access solution and financial viability will prove whether the site should be retained.	Retain	K/E1.11	Adequate	Adequate	Adequate	Adequate
		This site is located immediately adjacent to the railway station and could possibly be used to provide small scale business units although the site is small, long and narrow and awkward for such development. The employment allocations in Silsden (around the business park) provide better opportunities to deliver development and should be encouraged first. Should the land at the west of the site (which includes two existing buildings) be capable of being included in a development site however it is foreseeable that the site could be developed for residential use. The site has excellent proximity to the railway station and would prove popular for commuters.	remove from list. Already in use for employment use	K/E1.3				
		This sites provides land for the long term expansion of the business park and should be retained as such. The recent development which has been undertaken at the business park has been relatively successful now being fully let. It is considered that this land should only be developed once the remaining land at the business park has been developed (unless there is a specific requirement which cannot be accommodated on the remaining plots on the business park).	Taken off Register					

Appendix 2:

Employment Land Supply Resulting from Economic Development Services (EDS) Site Assessment

Appendix 2: Employment Land Supply in Hectares resulting from EDS Site Assessment

KEIGHLEY			
Short term	K/E1.16	1.85ha	Total 2.81 ha
	K/E1.12	0.96ha	
Medium term	K/E1.13	0.77ha	Total 1.52 ha
	K/E1.15	0.75ha	
Long term	K/E1.18	9.54ha	Total 11.27 ha
	K/E1.14	1.73ha	
Total			15.6 hectares

BINGLEY, CULLINGWORTH			
Short term	S/E1.6	0.92	Total 10.28 ha
	S/E1.7	1.76	
	S/E1.8	3.8	
	S/E1.14	3.8	
Medium term	S/E1.9	0.59	Total 5.81 ha
	S/E1.12	4.28	
	S/E1.13	0.94	
Total			16.09 hectares

SHIPLEY, BAILDON			
Short term	S/E1.3	6.31	6.31 hectares
Total			6.31 hectares

BRADFORD SOUTH			
Short term	BS/E1.2	0.47	Total 14.63 ha
	BS/E1.16	13.16	
	BS/E1.11	1.0	
Medium term	BS/E1.22	2.87	Total 11.87 ha
	BS/E1.12	1.69	
	BS/E1.26	5.42	
	BS/E1.21	0.46	
	BS/E1.27	0.63	
Long term	BS/E1.9	2.39	Total 2.88 ha
	BS/E1.13	0.49	
Total			29.38 hectares

BRADFORD NORTH			
Short term	BN/E1.11	0.55	Total 4.47 ha
	BN/E1.5	1.89	
	Friars Estate	2.03	
Medium term	BN/E1.1	1.17	Total 2.86 ha
	Dick Lane	1.69	
Long term	BN/E1.17	9.85	Total 9.85 ha
Total			17.18 hectares

BRADFORD WEST			
Short term	BW/E1.3	0.82	Total 8.44 ha
	BW/E1.15	0.94	
	BW/E1.9	6.68	
Medium term	BW/E1.17	2.01	Total 2.01 ha
Total			10.45 hectares

ILKLEY, STEETON, SILSDEN			
Short term	K/E1.6	0.68	Total .68 ha
Medium term	K/E1.11	1.03	Total 1.03 ha
Total			1.71 hectares

SUM TOTAL OF EMPLOYMENT SITES TO BE RETAINED:		96.72 Hectares
Total Short Term:		47.62 ha
Total Medium Term:		25.1 ha
Total Long Term:		24.00 ha

Appendix 3:

Regional Econometric Model (REM) Bradford Industries 2007 to 2026

Yorkshire and Humber Experian Business Strategies Economic Database
 Provided by Yorkshire Forward's Chief Economist Unit to the Yorkshire Futures Network
 Data downloaded 17 June 2011

Industry	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	Trends to 2027 and 2028 - linear projection of data 2011 to 2026	
																	2027	2028
Agriculture, Forestry & Fishing	0.307	0.292	0.274	0.257	0.241	0.228	0.222	0.217	0.216	0.216	0.217	0.216	0.215	0.215	0.215	0.216	0.190	0.184
Oil & Gas Extraction	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0.000	0.000
Other Mining	0.026	0.026	0.022	0.02	0.019	0.019	0.018	0.018	0.017	0.017	0.016	0.016	0.015	0.015	0.015	0.014	0.012	0.012
Gas, Electricity & Water	0.883	0.868	0.845	0.821	0.799	0.784	0.761	0.737	0.712	0.688	0.665	0.643	0.621	0.599	0.578	0.558	0.534	0.512
Fuel Refining	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0.000	0.000
Chemicals	1.448	1.424	1.441	1.473	1.485	1.479	1.497	1.507	1.512	1.519	1.527	1.534	1.54	1.546	1.551	1.555	1.573	1.582
Minerals	0.508	0.501	0.504	0.504	0.51	0.518	0.525	0.529	0.53	0.53	0.528	0.527	0.525	0.524	0.522	0.521	0.532	0.534
Metals	2.258	2.415	2.491	2.531	2.537	2.528	2.522	2.51	2.497	2.476	2.45	2.421	2.392	2.363	2.337	2.312	2.387	2.381
Machinery & Equipment	2.868	3.003	3.061	3.053	3.035	3.008	2.985	2.971	2.953	2.924	2.893	2.859	2.828	2.797	2.772	2.75	2.776	2.759
Electrical & Optical Equipment	1.768	1.686	1.686	1.689	1.702	1.738	1.774	1.776	1.804	1.832	1.856	1.877	1.894	1.91	1.924	1.937	1.953	1.970
Transport Equipment	1.218	1.233	1.281	1.319	1.348	1.37	1.396	1.418	1.438	1.456	1.469	1.479	1.486	1.492	1.497	1.499	1.563	1.583
Food, Drink & Tobacco	2.086	2.124	2.167	2.171	2.157	2.145	2.146	2.144	2.138	2.126	2.103	2.071	2.037	2.003	1.97	1.938	1.994	1.982
Textiles & Clothing	1.703	1.656	1.565	1.441	1.341	1.236	1.1	0.952	0.804	0.653	0.499	0.425	0.416	0.407	0.398	0.389	1.703	1.703
Wood & Wood Products	0.725	0.813	0.868	0.867	0.847	0.82	0.807	0.795	0.783	0.768	0.752	0.738	0.726	0.709	0.694	0.682	0.694	0.685
Paper, Printing & Publishing	4.567	4.517	4.597	4.685	4.748	4.762	4.79	4.829	4.87	4.918	4.963	5.007	5.048	5.093	5.135	5.176	5.221	5.264
Rubber & Plastics	2.304	2.325	2.362	2.419	2.442	2.454	2.471	2.483	2.487	2.486	2.477	2.463	2.446	2.427	2.404	2.38	2.470	2.475
Other Manufacturing NEC	1.702	1.728	1.799	1.828	1.834	1.828	1.825	1.821	1.814	1.805	1.792	1.776	1.759	1.741	1.723	1.705	1.756	1.753
Construction	8.208	8.208	8.208	8.208	8.208	8.208	8.208	8.208	8.208	8.208	8.208	8.208	8.208	8.208	8.208	8.208	8.208	8.208
Retailing	20.292	20.459	20.76	21.2	21.703	22.183	22.673	23.197	23.765	24.343	24.889	25.428	25.953	26.487	27.042	27.6	27.950	28.459
Wholesaling	12.97	12.966	13.07	13.148	13.203	13.247	13.306	13.399	13.527	13.684	13.843	14.008	14.186	14.381	14.596	14.831	14.682	14.804
Hotels & Catering	6.963	7.099	7.265	7.403	7.532	7.642	7.754	7.855	7.938	8.018	8.081	8.148	8.214	8.291	8.388	8.483	8.636	8.733
Transport	6.795	6.911	7.049	7.156	7.272	7.391	7.525	7.671	7.822	7.97	8.114	8.255	8.394	8.542	8.694	8.849	8.945	9.082
Communications	2.108	2.124	2.15	2.179	2.211	2.243	2.277	2.309	2.34	2.369	2.395	2.421	2.445	2.469	2.493	2.086	2.450	2.469
Banking & Insurance	5.76	5.787	5.823	5.872	5.844	5.804	5.816	5.848	5.884	5.926	5.968	6.012	6.057	6.106	6.163	6.225	6.168	6.196
Business Services	16.212	16.977	17.566	17.95	18.258	18.533	18.845	19.128	19.413	19.649	19.922	20.224	20.546	20.903	21.299	21.735	21.979	22.306
Services	4.747	4.877	5.006	5.158	5.343	5.496	5.619	5.706	5.777	5.854	5.927	6.01	6.092	6.187	6.295	6.369	6.551	6.656
Public Admin & Defence	7.114	6.679	6.453	6.316	6.194	6.109	6.084	6.08	6.075	6.063	6.033	5.99	5.946	5.906	5.87	5.834	5.660	5.600
Education	15.779	14.984	14.602	14.537	14.548	14.663	14.961	15.121	15.167	15.176	15.165	15.157	15.142	15.125	15.1	15.05	15.133	15.146
Health	23.889	23.491	23.49	23.611	23.655	23.679	23.816	24.01	24.21	24.423	24.625	24.794	24.945	25.108	25.286	25.458	25.423	25.558
Other Services	6.772	6.596	6.473	6.709	7.205	7.525	7.809	8.096	8.373	8.646	8.896	9.02	9.066	9.093	9.131	9.137	9.794	10.001
TOTAL	161.958	161.852	163.008	164.704	166.449	167.935	169.939	171.872	173.735	175.522	177.178	178.763	180.319	181.962	183.755	185.53	187.010	188.684

TOTAL

Data is given in thousands except Gross Value Added, Output and Productivity which are in £millions, and Location Quotients and Industry Occupation Ratios.

Data from the Economic Impact Model developed for Yorkshire Futures by Experian Business Strategies. Figures are consistent with Experian Business Strategies' macroeconomic and regional forecasts from Spring (March) 2011 Regional Planning Service. The data consists of historical employment, output, productivity, and population estimates and forecasts and other labour market information. This is based on a variety of official data sources (including the Annual Business Inquiry and the Labour Force Survey) as well as local information and opinion from subscribers to the service. Please read the online disclaimer before using this data.

The data consists of historical employment, output, productivity, and population estimates and forecasts and other labour market information.

This is based on a variety of official data sources (including the Annual Business Inquiry and the Labour Force Survey) as well as local information and opinion from subscribers to the service. Please read the online disclaimer before using this data.

Produced by the
City of Bradford Metropolitan District
Council

Local Development
Framework Group

