Economic and Employment Evidence to Support the Local Plan and Economic Development Strategy

Appendix 4: Sites and Premises

Prepared for Epping Forest District Council

September 2015

Contents

Job Number:	14-04-03
Version Number:	2.0
Approved by:	Gareth Jones
Date:	September 2015

1 Introduction

1.1 Objective of this paper

In the PID for this study, we agreed:

> *We will start this stage of the work with a review of existing data and analysis on the local property market. In your brief you have identified that: an Employment Land Review (ELR) was undertaken by Atkins in 2010 jointly with Brentwood Council, a Town Centres Study was prepared in 2010 by Roger Tym & Partners, and a Strategic Land Availability Assessment has recently been prepared by Nathaniel Lichfield & Partners which assesses (among other things) employment land for suitability. These reviews will form the basis of the local property market analysis, and any primary research and analysis will be focused on updating and filling any emerging gaps in these studies.*
>
> *Glenny LLP which is a well established local property advisory business forms part of our team. Where necessary, staff from Glenny will review and advise on local sites, including currently designated sites and sites that are being considered for allocation in the forthcoming Local Plan. Our work will consider the quality, quantity and location of the future land supply. The output of this stage will be a working paper on the local property market and future land supply. This will inform the next stage of the study and will form part of the final report.*

1.2 Supply of employment land

This paper builds up a broad picture of the supply of available employment land and premises in Epping Forest District taking account of:

- The current scale of occupied employment land and premises in the District
- The scale of additional supply – both actual and potential
- Planning Use Class designation of this supply – albeit that there is limited information available on this
- The broad location of the supply

This assessment of the supply of additional employment land and premises in Epping Forest District will be considered alongside the analysis of demand, to identify the implications for the future allocation of employment land in the emerging Local Plan.

The additional supply can be considered within the following categories:

- Currently vacant land and premises i.e. ready to be occupied
- Currently planned development i.e. developments with planning approvals in place
- Further development opportunities which can be delivered within the current Local Plan (2006) policies
- Potential development opportunities which are outside current the current Local Plan (2006) policies

2 Assessment of the current market

2.1 Summary

The commercial and industrial property market in Epping Forest District, and the broader regional property market, is healthy with demand rising. The availability of stock is falling as vacant properties are becoming occupied, and there is little new-build property coming to the market.

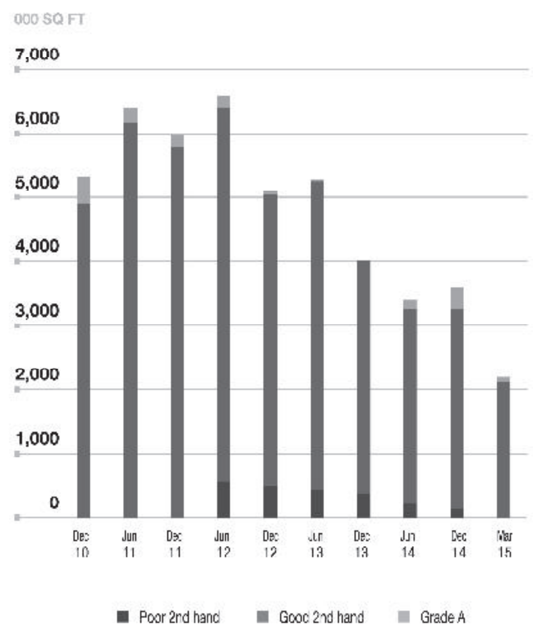
Epping Forest District is not a high priority location for inward investors, and much of the demand is from local businesses. Owner-occupiers are particularly interested in local development opportunities. There are a number of strong industrial and office locations and major development areas around Epping Forest District, and it will not compete as a major strategic employment growth location.

2.2 General market overview

The figures below show regional property agent Glenny's latest 2015 overview of the local markets for industrial and office properties in Essex and North London & Hertfordshire. It is clear from these figures that demand for industrial and to a lesser extent office space is rising, set against a dwindling supply of available accommodation.

This market in-balance has gradually gained momentum as the UK economy recovers from recession, with an upward trend evident since late 2011.

Figure 6.1: Industrial Market in Essex	
Availability	**Demand**



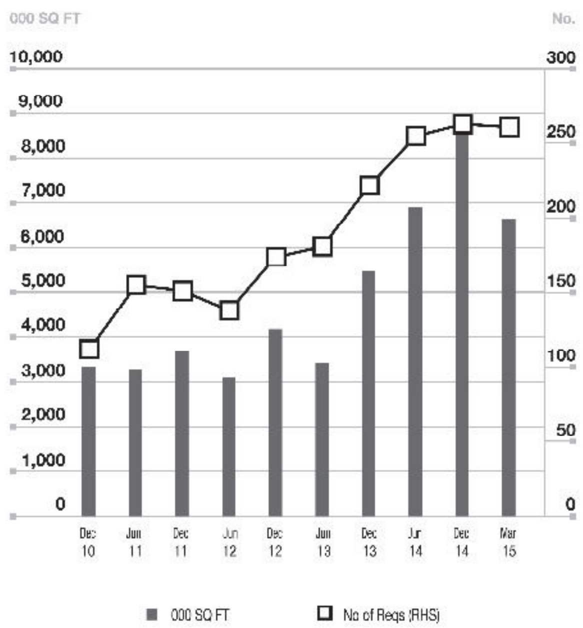
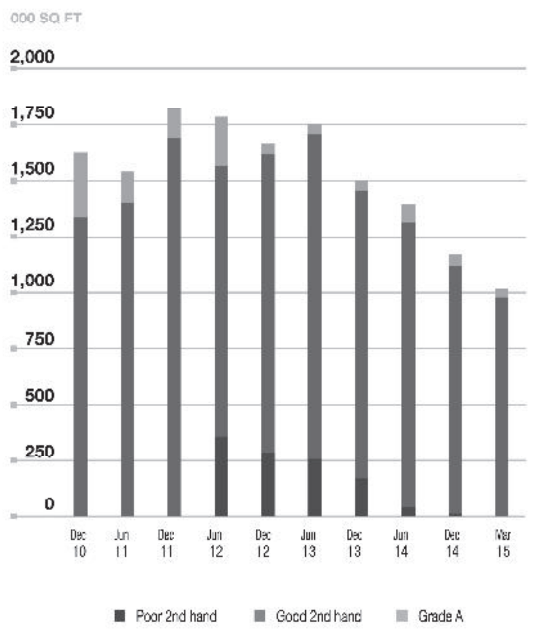


Figure 6.2: Office Market in Essex

Availability	Demand



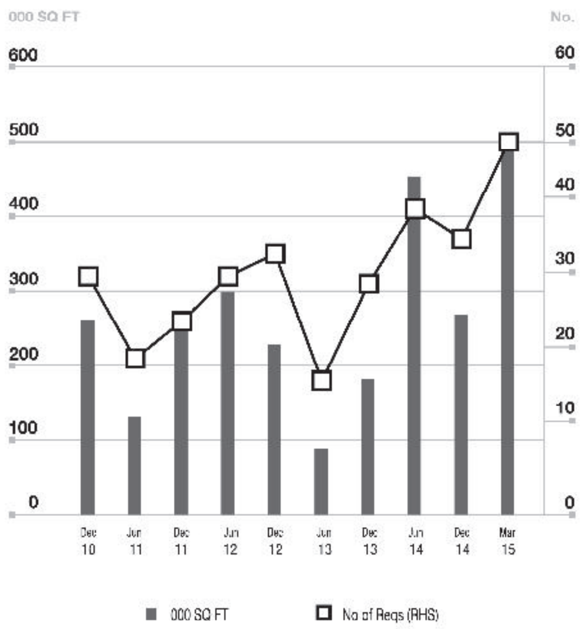
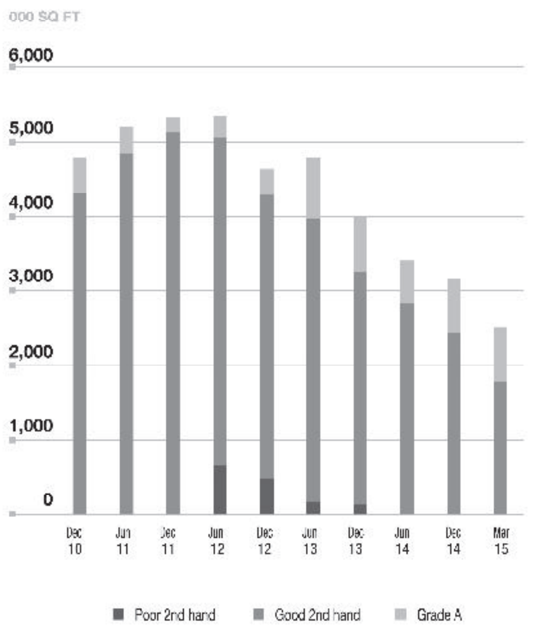


Figure 6.3: Industrial Market in North London and Hertfordshire

Availability	Demand



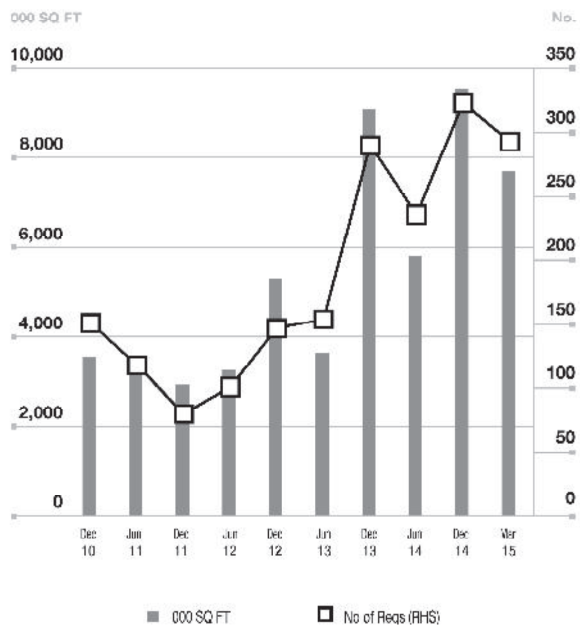
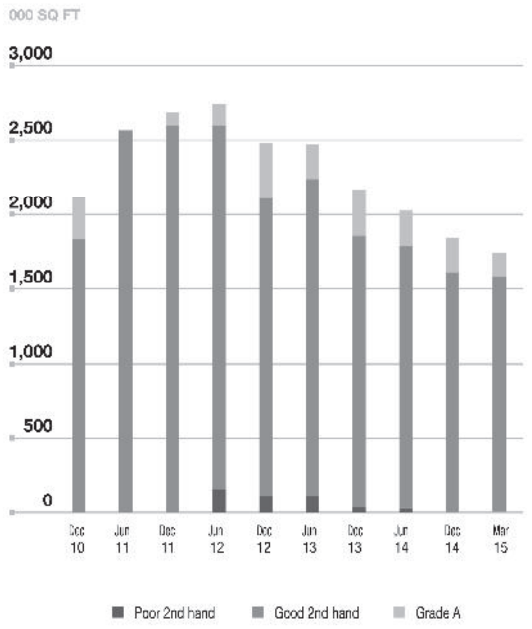
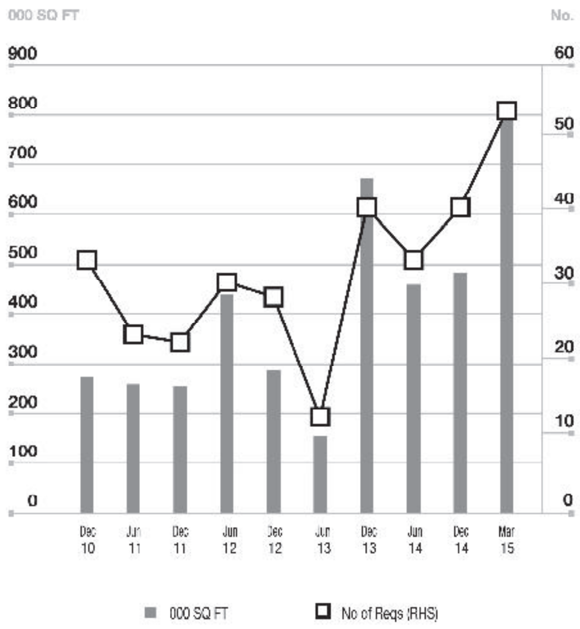


Figure 6.2: Office Market in North London and Hertfordshire

Availability	Demand
	

Source of all graphs: Glenny Databook, Q1 2015

The biggest constraint to take-up in the wider area is the lack of available stock. This is common to most of London and the South East. Little speculative development is taking place, and any such development is usually taken up quickly. The increasing take-up is reducing the amount of available stock. In much of the wider region, including Epping Forest, the limited amount of available land is restricting the amount of development that can take place.

Glenny believes that this excess of demand over supply will continue into the foreseeable future.

Inside the M25 there is strong competition for sites between commercial and industrial developers, owner-occupiers and residential developers, creating strong competition for sites that do become available. Outside the M25 there is less appetite from industrial developers, and land values are commensurately less.

Outside of established office locations, office demand in Epping Forest District has not been particularly strong in recent years, with limited pre-let development and speculative development. Gradual changes in working practices, with more people working in more flexible ways, may have helped to dampen the recent demand for offices. Although prime office rents have risen in the last couple of years, office rents across Epping Forest District have been fairly static, and the market has seen only a little effect from the recently revised Permitted Development Rights (PDR). Some lower quality office developments are being acquired, with a view to conversion to residential in the longer-term. This is leading to values, but not rents, rising hence lower investment yields. However, PDR is not yet having a large impact on the office occupier market as there has been an over-supply in recent years. The main office centres in the wider area are in Brentwood and

Stratford rather than Epping Forest District, and there is little sign of speculative development taking place outside these core areas.

2.3 The market in Epping Forest District

Most of the interest in Epping Forest District is from the service sector, with only a small level of interest from, mostly niche, manufacturers. There is little evidence of demand for warehousing and distribution in the Epping Forest area, largely because there are few sites that could accommodate this. However, the general lack of supply and increasing demand for warehousing and distribution sites in the wider area means that any good quality sites that are allocated are likely to be attractive to the market.

The main industrial areas in the District are Loughton and Waltham Abbey.

In Loughton there has been some recent activity in the employment land and property market. Langston Road has generally good quality employment premises. There are a number of car dealerships in the area, and a planning permission for a retail development. At Oakwood Hill, Epping Forest District Council holds many freeholds. The Council is not considering the development potential of this area, and is content to collect ground rent on the freeholds that it owns. The high level of ground rent and also the reducing long leasehold term make these sites unattractive to the development market, unless the Council looks to undertake a joint venture. There is potential for longer-term redevelopment here, with the right conditions and commitment from the Council and other landowners. The stock here is ageing and much dates back to the 1950s and 1960s. The stock is a mix of ages and specifications, and whilst some premises still have a good level of usefulness, others will be at or approaching the end of their practical life within 10 to 15 years.

Looking at where the employment land lies within the District, 'big box' distribution warehouses are not viable, and therefore smaller warehouse developments would be the preferred strategy for commercial developers. This type of development has consistently let and sold well within the locality, appealing to the local SME market. If a well located site, close to both public transport and good road links was available, there may be an argument for small scale office development. However, the caveat on this would be that it is ideally aimed at the owner-occupier market, so self-contained 'pavilion' style buildings would be more suitable than multi-occupied properties.

There is likely to be strong competition for the re-use of redundant industrial sites, particularly in places such as Loughton where demand to provide housing is greater. In less urbanised areas this pressure may be less, albeit given the generally affluent nature of the District, commercial pressures may lead to the loss of some rural employment sites.

The stock in Waltham Abbey is of varied quality, and it serves a mostly local market. The Abbey Mead Industrial Park at Brooker Road has good access to the M25.

There is little demand for employment property in Epping Forest District from major inward investors. Most of the demand for property in the District is from local businesses. As mentioned above, smaller self-contained buildings would be more attractive to local owner-occupiers than large multi-occupier buildings as there is strong demand for owner-occupied property. This is evidenced by the recent acquisition of the Clinton Cards site by the adjacent Mercedes franchise, paying more than an industrial developer would be prepared to pay. Generally smaller product in a mix of sizes up to 3,000 sq m could work, assuming B1(c), B2, or B8 Use Class allocation. On Use Class B1(a) accommodation, local property agent Glenny would suggest no more than 500 sq m in a single building.

The main office locations in Epping Forest District are in Epping and Loughton. Outside these areas most offices are above retail rather than in dedicated premises.

Development opportunities in Epping Forest District include:

- North Weald Bassett and the North Weald Airfield, which could accommodate over 40,000 sq m of employment space, which would need to be delivered in phases. Improving the access to the site will be the main challenge in making it attractive to the market
- Debden Broadway (Loughton), where a development options study identified the potential for up to 8,000 sq m of mostly retail and leisure development
- Langston Road, which is discussed above
- Waltham Abbey, where there has been piecemeal small scale development from private developers around Brooker Road. This is likely to continue in modest form. The Council still owns a high proportion of the estate.
- Epping, St John's Road – potential for a mixed-use town centre development

2.4 The market around Epping Forest District

Supply and demand for industrial and commercial sites and premises in Epping Forest District are affected by the strength and attractiveness of the locations around it and their future development prospects. Compared to many surrounding areas, Epping Forest District is an attractive residential location with good links to stronger employment areas around it.

Significant development plans have been proposed for Brookfield Farm in Broxbourne, which is very close to Epping Forest District, and Waltham Abbey in particular. Already a well established district centre and strong retail location there are plans for further commercial and industrial development. Park Plaza North is another site that sits adjacent to the M25. The Council would like to see this developed as a high tech business park, but appetite for this kind of development in the area from both occupiers and commercial developers is weak. The site sits on the A10 and therefore would represent a good warehouse or industrial opportunity, but for this to happen the Council would need to change their policy approach to the site.

Brentwood is a strong office location, but there is limited land available for further development. Sites that do become available are attractive to residential developers, so there is strong competition for them.

Romford has a reasonably large commercial centre. There are some offices in the town centre and a large industrial estate at Harold Hill. There is not much development land available, and the local market is not very dynamic.

Walthamstow has little stock and land available. Green Belt designation places a constraint on significant further development in this area.

Stratford has seen significant development in recent years, especially in retail property. Stratford is only around 20 minutes from Epping Forest District by underground rail. It is developing into a strong office market with both pre-let and speculative developments taking place. Transport for London and the Financial Conduct Authority have taken 750,000 sq ft of offices in Stratford recently. It is starting to compete with Docklands and the City as a major office location.

Enfield is a well established industrial location, second only to Park Royal in London. It is a distribution base that serves the whole of London. There is significant developer interest here, and speculative development is taking place.

Harlow will draw in occupiers from the rural areas, Waltham Abbey, and potentially from Loughton, as Harlow could provide cost effective property solutions compared to those more expensive areas within the M25.

Chelmsford and Stansted are not competing with Epping Forest District as both are more regionally significant in nature, so are attracting different types of tenants.

3 Current stock of employment land

3.1 Employment land

The latest Employment Land Review for Epping Forest District (and Brentwood Borough) was published in 2010[1]. This study was concerned only with B Class employment land. In 2010 some 42 sites were identified, of which 21 were in the urban areas of the District and 21 in the rural part of the District. These are mostly sites identified in the current Local Plan (2006). Of the 42 sites, 16 are allocated and 26 unallocated.

The review states that there were 536 premises at the 42 sites (where the premises of a business can include several buildings at the same site occupied by the same business). Around 4% of these premises were vacant. According to the review, the average size of premises in Epping Forest District is 344 sq m, which is considered as being small.

The review states that the 42 sites covered a total of 127 hectares of employment land. This comprised:

- 11.7 hectares of established office locations, with 82 premises
- 36.2 hectares of warehouse/distribution parks, with 141 premises
- 39.0 hectares of general industrial areas, with 164 premises
- 9.7 hectares of business incubator and SME cluster sites, with 59 premises
- One retail site of 24.4 hectares
- One site of 0.2 hectares for a specific occupier
- No high quality business parks, recycling/environmental industry sites or farm-based employment locations

21 of the sites were in the rural part of Epping Forest District. These sites accounted for 48% of the total employment land, and 182 of the premises. Five of these premises were vacant, and 8.9 hectares of the land was vacant or derelict. The urban area also accommodated 21 sites and 182 premises.

Within the five years prior to the report, 5% of the current *"total site area of premises"* had been developed, mainly at Oakwood Hill Industrial Estate (para 5.41, p.51).

According to the review, 29% of sites were of 'good' quality, 67% were 'average' and 3% were 'poor' based on the quality of their premises (Table 5.11, p.54).

In terms of accessibility by public transport, 15 sites were within 800m of a railway station and 19 sites were within 800m of a bus stop. 29 of the 42 sites had dedicated car parking.

3.2 Town centres

Roger Tym & Partners was commissioned to undertake a town centres study for Epping Forest District[2]. This study looked at Epping, Loughton High Road, Waltham Abbey, Loughton (Debden)

[1] Atkins (2010) Epping Forest District and Brentwood Borough Employment Land Review
[2] Roger Tym & Partners (2010) Epping Forest District Council Town Centres Study: Final Report

Broadway, Chipping Ongar and Buckhurst Hill. Most of the fieldwork took place in 2009. Feasibility studies to look at the potential for development in Loughton High Road, Loughton Broadway and Buckhurst Hill were conducted in 1998, and these suggested traffic, parking and pedestrianisation improvements. A development options report for Debden Town Centre and Broadway (i.e. Loughton Broadway) was produced in 2009.

The study includes a health check of each of the settlement centres, carried out in 2009 so now five years old. The amount and distribution of premises and floorspace in the six main settlement centres as set out in the study is summarised in the table below.

	Epping	Loughton High Road	Waltham Abbey	Loughton Broadway	Chipping Ongar	Buckhurst Hill
Retail (Experian retail) including A2, misc. and vacant	150 units 24,560 sq m	194 units 32,220 sq m	61 units 9,785 sq m	62 units 10,080 sq m	57 units 7,309 sq m	83 units 9,654 sq m
B1 Business (Experian Goad)	19 units 7,280 sq m	14 units 3,840 sq m	1 unit 100 sq m	1 unit 140 sq m	4 units 567 sq m	2 units 290 sq m
Other (Experian Goad) including drinking establishments, vacant and sui generis	28 units 7,190 sq m	24 units 8,600 sq m	10 units 1,560 sq m	7 units 930 sq m	17 units 2,214 sq m	15 units 2,311 sq m
TOTAL	**197 units 39,030 sq m**	**232 units 44,660 sq m**	**72 units 11,445 sq m**	**70 units 11,150 sq m**	**78 units 10,089 sq m**	**100 units 12,255 sq m**

The study summarised the nature of each of the settlement centres:

- Epping is the principal settlement centre in the District. The quality of the centre is good. Its retail ranking had declined in the five years prior to the study. Its diversity of uses was in line with the national average. Vacancies were low, yields were constant and rental levels were increasing.
- Loughton High Road had a higher retail ranking than Epping. There were a low number of vacant units. Yields were low, and rents had been increasing in the previous few years. There were concerns about safety in the centre at night
- In Waltham Abbey the retail offer is local, other than a Tesco. The settlement has a pedestrianised core
- Loughton Broadway is a small retail centre with only a few multiple retailers. It has a high proportion of convenience retail floorspace
- Chipping Ongar has two small supermarkets. There are high traffic flow which affect the environmental quality of the centre
- Buckhurst Hill has only one multiple retailer

There is a limited amount of out-of-centre floorspace in Epping Forest District.

The Roger Tym & Partners' study recommends that the hierarchy of centres in Epping Forest District should comprise two levels: Epping and Loughton High Road are district centres; and Waltham Abbey, Loughton Broadway, Chipping Ongar and Buckhurst Hill are small district centres (Table 8.1, p.88).

4 Currently vacant land and premises

Within the premises surveyed for the Employment Land Review in 2009 there was 12,000 sq m of vacant space (Appendix D3) across 22 premises, but it is not clear what Planning Use Class this space was within. The Employment Land Review *Employment Sites Master Copy* database shows a total of 210,000 sq m of employment space. This would suggest a vacancy rate of 5.7% at the time of the survey. The main report states a vacancy rate of 4-6% (para 5.19 p.47). It is noted that vacancy levels were 'very low' in Epping Forest District (para 7.18, p.83).

There are a small number of sites with this vacant space:

- North Weald Extension (2) had 4,100 sq m
- The Maltings had 200 sq m
- Bower Hill had 2,000 sq m
- Hillgrove Business Park had 1,600 sq m
- Oakwood Hill Industrial Estate had 600 sq m
- Abbey Mead Industrial Park had 3,500 sq m

5 Currently planned development

The Employment Land Review identified two current employment sites with planning permission. The largest of these was Area A6 at the Royal Gunpowder Mills in Waltham Abbey. Together these sites comprised 1.4 hectares of land.

6 Potential future land supply

6.1 Strategic Land Availability Assessment

A strategic land availability assessment was carried out in 2012[3] to assess the availability of sites for housing, employment or retail development, and updated in 2013 and 2014. In 2102, a total of 416 sites were identified. Of these, 344 were fully assessed. Of these sites:

- 20 were suitable within current policy, available and achievable. They were considered to be deliverable within five years
- 199 were suitable outside of current policy, available and achievable. They were considered to be deliverable within five years
- 30 were developable from five years onwards

The analysis does not exclude sites that are do not conform with the existing Local Plan (2006) e.g. because they are situated in the Green Belt.

Appendix 4 to the SLAA sets out the list of sites that were assessed. By the 2014 version of the SLAA, some 37 sites were identified as employment sites for their primary use. Of these, eight were suitable for commercial development within current policy. Only three of these were identified as immediately deliverable (Hurricane Way Industrial Estate North Weald Bassett and two sites at Oakwood Hill Industrial Estate Loughton), and they amount to 5.2 hectares. The rest were suitable for development outside of current policy – mostly because they were within the Green Belt. Of these other sites:

- The five that are suitable for commercial development but may not be deliverable comprise 65 hectares which could accommodate around 39,000 sq m of development[4]
- Twelve sites that are deliverable but outside current policy (mostly in the Green Belt) comprise 68 hectares of land which could accommodate over 100,000 sq m of development plus further glasshouse developments[4]
- A further seven sites outside current policy are developable i.e. deliverable, but with some possible constraints or viability issues. These comprise 195 hectares which could accommodate nearly 200,000 sq m of development
- Ten sites outside current policy may not be deliverable. These comprise 63 hectares which could accommodate nearly 120,000 sq m of development[4]

47 sites were identified as employment sites for their secondary use. All but one of these were in the Green Belt; and the remaining one was in a Flood Zone.

Eight sites were identified for town centre use as their primary use. All of these were suitable within current policy. Two sites were identified for town centre use as their secondary use. Both were suitable within current policy. Of the primary twin centre sites:

[3] Nathaniel Lichfield & Partners (2012) Epping Forest Strategic Land Availability Assessment,

[4] Site areas and floorspace estimates are taken from the SLAA. Floorspace estimates should be considered as a minimum, and in some cases sites are proposed for a mix of uses, of which employment is only one

- Three are in Epping. All are considered as being within current policy and deliverable. They comprise 4 hectares of land, and could accommodate nearly 8,000 sq m of commercial development[4]
- Two are in Waltham Abbey. Both are within current policy, but only one is considered as deliverable. This site is just under one hectare, and could accommodate 1,700 sq m of commercial development[4]
- Three are in Loughton. Two of these are within current policy and are developable when their current occupiers are relocated. They could accommodate over 5,000 sq m of commercial development[4]

Two sites were identified for retail use as their secondary use. One was within current policy, and one was located in the Green Belt

6.2 Employment Land Review

The Employment Land Review looked at the development potential and constraints on each of the 42 sites that it considered. According to the review, nine of the existing employment sites had uses that were incompatible with neighbouring uses; 18 sites could be affected by the introduction of non-B Class uses on site; and 11 had the potential to support 24 hour working.

Each of the sites was assessed for its potential for change, either through the delivery of additional floorspace, or through upgrading the existing premises. Four of the 42 sites had potential for development in the short-term (one to three years), accounting for 3.8 hectares. Some 3.4 hectares of this is at Oakwood Hill Industrial Estate. The report is not clear about whether this is redevelopment of existing premises or development of currently vacant land. Thirteen of the 42 sites had potential for development in the medium to long-term (i.e. more than three years), accounting for 10.3 hectares of land. Within this total, the two largest parcels of land are at Oakwood Hill Industrial Estate (4.5 hectares) and North Weald (5.7 hectares).

At para 6.31 (p.75) it is stated that there are 16 sites in Epping Forest District with potential for change. Table 6.1 (p.77) sets out the potential floorspace capacity at existing sites. This suggest that there is 5.1 hectares of vacant land and 10.3 hectares of opportunity land. It is suggested that this land could accommodate 46,300 sq m of B1, B2 and B8 development.

6.3 Development potential outside current Local Plan policy

A number of employment developments have been proposed, that fall outside the current (1998/2006) Local Plan policy. These are summarised below.

6.3.1 North Weald Bassett and Airfield

EFDC has commissioned a masterplan for the future development of and investment in North Weald Bassett village, including North Weald Airfield[5]. This masterplan refers to a Deloitte study carried out in 2013 which considered different scenarios for the future development of the Airfield, and identified a preferred option of mixed-use development including continued aviation use, employment, leisure and 1,670 new homes. Employment accommodation was envisaged as hangars

[5] Allies & Morrison (February 2014) North Weald Bassett: Stage 1 Draft Report

and dedicated employment premises. The Allies & Morrison report states that the Deloitte report suggested over 31,000 sq m of employment space. There is a local pressure group that wants to keep the Airfield operating.

The report states that the level of employment in the local resident population is higher than the national average, and the proportion that work full-time is higher than the national average. More people travel to work by car than the national average, and usage of the Underground to travel to work is high (in keeping with the District as a whole). Levels of deprivation are low in the local community.

The Allies & Morrison report states that the 2010 Employment Land Review for Epping Forest District identified two sites at North Weald Airfield for intensification, extension of redevelopment, which could deliver 13,139 sq m of B1 to B8 floorspace. The report also states that the SLAA identifies a potential yield of up to 42,000 sq m of commercial floorspace.

The Airfield is owned by Epping Forest District Council. It is currently used for historic and general aviation activities. Between 60% and 70% of airfield activity is at the weekend. Other commercial activities take place at the Airfield including a large weekend market, freight distribution, transport, logistics, driver training, and car driving experiences. The market provides the largest source of income to the Council, but it has been declining in recent years.

The Allies & Morrison report (Part 1, p.53), considers potential property development in North Weald Bassett, including the Airfield. This is summarised in the table below.

Activity	Allies & Morrison Commentary
Residential	Potential for development
Offices	Limited potential, but the site could accommodate a business park, and provide Grade A office space, for which there is demand
Industrial	Proximity to M11 and M25 would make this a good location for distribution and logistics. The site could also accommodate high quality industrial space, which it suggests is in short supply
Retail	The scale of the proposed development would support a supermarket
Education	The local primary school may need expansion to accommodate many more homes
Glasshouses	The site could accommodate glasshouse developments, but lower land values are likely to make this unattractive
Leisure	A new leisure centre could be accommodated, possibly as a replacement for the existing centre at Epping

The report states that residential development will be the main value driver at North Weald Bassett and Airfield.

It is acknowledged that transport improvements will be needed to support development at North Weald Bassett and Airfield, and that a new junction (7a) on the M11 will free up capacity at the current Junction 7. Opening the Epping-Ongar railway line for mainline services, and the provision of a park-and-ride facility at North Weald Airfield are considered in the report.

One of the aims established for the future development of North Weald Bassett and Airfield is to strengthen commercial and aviation activities in the area, and provide employment opportunities. The development principles set out in the Allies & Morrison Stage 2 report[6] suggest that the operation of the Airfield for flying will continue. The report states that some 30 hectares of land could be released for development uses. Any development needs to allow the ongoing operation of the Airfield. The growth scenarios set out in the Stage 2 report suggest that development will take place to the east of the existing runway. None of the options presented in the report sets out the likely scale of employment development. The report implies that just under 43 hectares of mixed-use development could take place at North Weald Bassett and Airfield.

6.3.2 Debden Broadway

A development options study was undertaken in 2008 for Debden town centre and Broadway[7]. This looks at improving the quality of an existing retail area. This could create additional employment in retail and leisure outlets. A new transport interchange at Debden Station is also included in this proposal. The study suggests that offices could form part of the development in this area.

The study identifies that just under 8,000 sq m of commercial space (mostly retail and leisure) could be delivered in the regeneration. Presumably this is not net additional, as there may be loss of some space to allow this to be developed.

6.3.3 Langston Road

In 2012 outline planning permission for a site at Langston Road was awarded. Permission was granted for a 16,000 sq m retail park which is proposed to generate 200 jobs.

6.3.4 Waltham Abbey

In 2015, PBA prepared a town centre framework for Waltham Abbey[8]. This set out six economic priorities for Waltham Abbey:

- Working in partnership with businesses, local organisations and other public sector stakeholders
- Marketing and promotion of the centre
- Exploring tourism potential
- Improving retail, entertainment and leisure
- Maximising the contribution from employment and businesses
- Further work on transport and infrastructure

A number of opportunities for change were identified within the settlement centre:

- Development of the Market Square, possibly as a food and beverage quarter
- Creating a pedestrian and bus link from Tesco to the centre
- Revitalising the police station, museum and library area

Some secondary and tourism opportunities were also discussed.

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[6] Allies & Morrison (April 2014) North Weald Bassett: Stage 2 Draft Report
[7] Urban Practitioners, Colin Buchanan and CBRE (2008) Debden Town Centre and Broadway Development Options: Final Report
[8] Peter Brett Associates (Jan 2015) Waltham Abbey Town Centre Strategy Framework: Draft for Discussion

Also in January 2015, Colliers prepared a town centre report from Waltham Abbey[9]. This included a review of the centre and a SWOT analysis. This report suggested:

- Larger retail units are needed to attract national retailers
- There should not be further office development in Waltham Abbey centre
- There is demand for, but limited availability of, residential units in the centre

The study made a number of recommendations, including:

- Improving signage and way-finding, removing clutter, improving refuse facilities and introducing pop-up retail units
- Creating a single transport node
- Relocating existing retailers to form a cluster of retail
- Enhancing the garden entrances and water features
- Improving public realm in key areas, introducing a statue of King Harold, and creating a mosaic trail
- Creating a one-way traffic system
- Pursuing development opportunities on a number of identified sites

6.3.5 Epping

A development brief has been prepared for the St John's Road site in the centre of Epping[10]. Four options for the development of the site, with a range of different mixes of use have been considered. Retail and leisure appear to be the most significant sources of employment (other than in the construction of any new development), although there are some small office proposals included in some of the options, and community facilities may create a small number of jobs. Although a supermarket has been considered, it is unlikely that this will be acceptable.

Leisure uses may include a sports and leisure facility, or commercial leisure facility such as a cinema. Retail facilities could include food and drink outlets. Offices could be provided on the upper floors of any developments. A hotel could form part of the development.

No planning application has yet been submitted for the development of the site.

6.4 Future retail developments

In its assessment of need, the study only considers future retail needs. The study's assessment of future need for retail premises (Use Classes A1 to A5) is an additional:

- 23,400 sq m between 2009 and 16
- rising to 36,000 sq m by 2021
- rising to 62,300 sq m by 2031

These figures are cumulative and caution is expressed over the 2031 figure. Much of this demand will be derived from the 'claw back' of spend that currently leaks out of the District.

Town centre employment other than retail is not considered.

[9] Colliers International (Jan 2015) Waltham Abbey Town Centre Report
[10] Allies & Morrison (2012) St John's Road Epping: Design and Development Brief, Draft Report

Future development options for each of the settlement centres are discussed in the study. Two options for most centres were considered – no further development, and some modest development. In summary:

- The St Johns Road site in Epping is a 3 hectare site that has potential for redevelopment. In total there could be demand for up to 21,700 sq m of additional retail space in Epping to 2031
- Loughton High Road has limited space for new development, so redevelopment and intensification would be necessary for future development. In total there could be demand for up to 12,700 sq m of additional retail space in Loughton High Road to 2031
- Waltham Abbey has limited growth potential. It could support up to an additional 7,200 sq m of additional retail space by 2031
- Loughton Broadway (Debden) is seen as an area with significant growth potential , and could support up to 13,300 sq m of additional retail space by 2031. There are a series of potential development sites, including the Sainsburys site
- Chipping Ongar has limited scope for growth. It could support up to an additional 5,600 sq m of additional retail space by 2031
- Buckhurst Hill has limited scope for growth. It could support up to an additional 2,000 sq m of additional retail space by 2031

7 Critique of existing evidence base

The Planning Advisory Service (PAS) provided a critique of the ELR and the town centres study[11].

The ELR is criticised for a narrow focus on B Class employment land, to the exclusion of other land uses that accommodate employment, in particular Use Class A2 (financial and professional services) the retail sector and public services. The ELR is also criticised for the lack of detail that it provides, making it impossible to reconcile with the town centres study.

The town centres study is criticised for not looking at the wider uses of the town centre, although this was outside the scope of the study. There is no data on the employment aspects of future retail growth. There is no consideration in changes to way that people shop i.e. a move towards more internet-based retail, and the impact that this could have on town centre retailing.

[11] PAS (2012) EFDC Support Programme: Advice note on evidence relating to employment land and town centres