



The Longmead and Nonsuch Industrial Estates Capacity Study



Epsom & Ewell Borough Council
The Longmead and Nonsuch Industrial Estates Capacity Study

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1. Introduction

- 1.1.1 This focused report applies an urban capacity and feasibility study approach to the consideration of the potential of the existing Longmead and Nonsuch Industrial areas for delivering future housing growth. This objective is set against the Borough's significantly increased housing need figure of 579 units per year; as calculated through the government's standard methodology introduced by the Revised National Planning Policy Framework (NPPF) (July 2018). As a key part of developing the new Epsom & Ewell Local Plan, the Borough Council is investigating every opportunity for potential sources of housing supply by 'looking under every stone'. The opportunities offered by these two employment areas is one such stone.
- 1.1.2 The Borough's capacity to deliver new housing is constrained by a number of factors. Being comprised of existing urban areas or Green Belt, the supply of available development sites is now extremely limited. Equally, much of the Green Belt and large areas of the existing urban area are further constrained by primary constraints. These are explored in detail in [the Epsom & Ewell Local Plan Constraints Study \(June 2017\)](#).
- 1.1.3 In the past, the Borough Council has always met its housing targets, although these were considerably lower at 181 units per annum (Core Strategy Policy CS 7 July 2007). A significant source of housing land supply came from the redevelopment of five of former hospital sites in the Green Belt, which has now been completed. Across the rest of the Borough, high housing values have meant that most sites are developed for residential uses as soon as they become available. As a result there are now very few readily available development opportunities and few of any significant size.
- 1.1.4 The government's NPPF requires local planning authorities to identify land for new homes. Specifically the NPPF requires that they have a clear understanding of "*...the land available in our area through the preparation of a strategic housing land availability assessment. From which planning policies should identify a sufficient supply and mix of sites...*" (NPPF Paragraph 67).
- 1.1.5 In the course of identifying the new sites that could come forward to meet the Borough's housing need the Borough Council has already prepared [two Strategic Housing Land Availability Assessments \(2009 and 2017\)](#).¹ These seek to identify potential sources of housing land supply that are genuinely available, deliverable and developable. To summarise, they are sites that can come forward immediately to meet housing need. Both these documents are considered comprehensive, robust pieces of evidence, and show that there are very limited sites to set against our future housing requirements.

¹ The most recent of these Assessments came before the Borough Council's Licensing & Planning Policy Committee during June 2017, whilst the earlier came before the Planning Policy Sub-Committee during 2009.

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1.1.6 With a dwindling land supply and a significant need for new homes, the Borough Council is now considering other options to deliver new housing. Potential opportunities, which may have not been considered in the past due to the existing on-site uses or policy designations are being explored. The rationale is to leave 'no stone unturned' in a bid to ensure where possible, housing supply is maximised to help meet the identified need. The Longmead and Nonsuch industrial areas are therefore being examined for their future housing potential.

1.2 Planning Policy Context

1.2.1 Historically the Local Plan has taken a very cautious approach towards the possible loss of any employment land. This reflects the Borough Council's strategy of optimising the use of existing employment and other commercial (including retail) sites. This approach has largely been successful, demonstrated by the strong performance of these sites throughout recent recessions.

1.2.2 The Longmead and Nonsuch Industrial Estates have been protected for employment uses only. These estates were intended to be the primary location for industrial and warehouse development within the Borough. Over the past two decades there has been very little new commercial development within the Borough and both the previous and current policy strategy is to protect the existing employment land provision against losses. The Core Strategy Policy CS 11 (adopted in 2007) reads *"losses of employment land will be resisted in the strategic employment areas of the Longmead and Nonsuch Industrial Estates"*. It goes on to state *"regeneration of employment premises and intensification of employment uses will be encouraged in these locations."*

1.2.3 The application of such policies has ensured employment uses on the industrial sites remain. However the nature of these uses have evolved over time and the estate has become more retail focussed with a shift away from pure B2/B8 use classes and an influx of a large number of car sales / repair units and trade warehouses, particularly on the Nonsuch side.

1.2.4 The Borough Council is currently producing a new Local Plan, which will guide the development of the Borough up until 2032. Informed by evidence, the Local Plan will respond to the Borough's increased housing need, alongside other competing needs. It will set out a variety of policies and allocations for housing / other various land uses.

1.2.5 The recently revised NPPF places great importance on increasing the rate and speed of housing delivery; however, it also states that "significant weight should be placed on the need to support economic growth and productivity, taking into account both local business needs and wider opportunities for development". The industrial estates are the focus of a significant proportion of the Borough's employment activity and therefore play an important role in the economic prosperity, vitality and viability of the Borough. These competing needs must therefore be carefully balanced.

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1.2.6 Since the adoption of the Core Strategy in 2007 the Council has consulted on employment land allocations as part of an 'Other Sites Consultation Paper' (October 2013). That document proposed the retention of the Longmead and Nonsuch Employment Areas. It was considered that these areas continue to serve as a source of employment land/ floorspace for the Borough. This being provision that cannot be met elsewhere; either at other existing employment sites or upon new employment site allocations. It is particularly noteworthy that both Employment Areas remain viable and fit-for-purpose with high levels of occupancy. They continue to meet the needs of existing and emerging business sectors. The responses made during the Other Sites Consultation process generally supported this proposal.

1.3 Study Objectives

1.3.2 The Study evaluates the potential of the industrial estates for housing. It will take into account recent national policy changes and other up to date information. Its findings will be considered against other evidence to inform the Local Plan and ensure that it strikes an appropriate balance between competing land use needs across the Borough.

1.3.3 The Study considers the potential of the industrial areas to deliver future housing and how this may contribute to the emerging Local Plans housing target. In summary the study objectives are to:

- Identify existing on-site uses and uses adjacent to the industrial areas
- Gather intelligence relating to occupation, investment, potential constraints or opportunities, aspirations of landowners and accessibility
- Explore scenarios as to how the sites could evolve in the future to deliver a varying degree of housing alongside a mix of employment uses
- Conduct a SWOT analysis (strengths, weaknesses, opportunities and threats) of these scenarios and make recommendations.

1.4 Methodology

1.4.1 The first action undertaken by the Study was to identify the extent of the assessment. The geographical area covered by the Study is comprised of the land that falls within the designated Longmead and Nonsuch industrial areas, including the area occupied by the Sainsbury's food store on the Kiln Lane side. This is shown on Figure 1.

Desktop Review

1.4.2 The next action for the assessment was to undertake a desktop review of the existing information available. This included;

- A review of the relevant planning history on the site (for example applications for change of use/ significant refurbishment signalling investment in the site).
See Annex 1.

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- A review of the Geographical Information System (GIS) data layers available; inclusive of the creation of maps showing the information to help guide appropriate locations/ densities and restrictions. Available information includes: land ownership/ Flood Zones and Critical Drainage Areas/ Planning Constraints such as Conservation Areas, Article 4 Areas, Listed Buildings/ Historic landfill Site/ Cycle Routes/ Road Network/ Footpaths and Bridleways
- Kiln Lane Link investigative work. Two documents prepared by 'Economic Growth Management' for Surrey County Council. 1) Economic case for the Kiln Lane Link Road- findings from interviews with Freeholders and Major Site Leaseholders. 2) Findings from interviews with Commercial Property Agents. (2014)
- Discussions with the Borough Council's Head of Property
- Review of commercial market conditions; this included online searches for vacancies. See [Annex 2](#) for the two available marketing papers for the site.

Site Visit

- 1.4.3 A site visit was carried out in July 2018 to appraise the existing on-site uses, condition of units, vacancies, quality of the environment, evidence of recent investment, and obvious opportunities for intensification / mix of uses. A photographic record was made where possible.

Analysis of findings

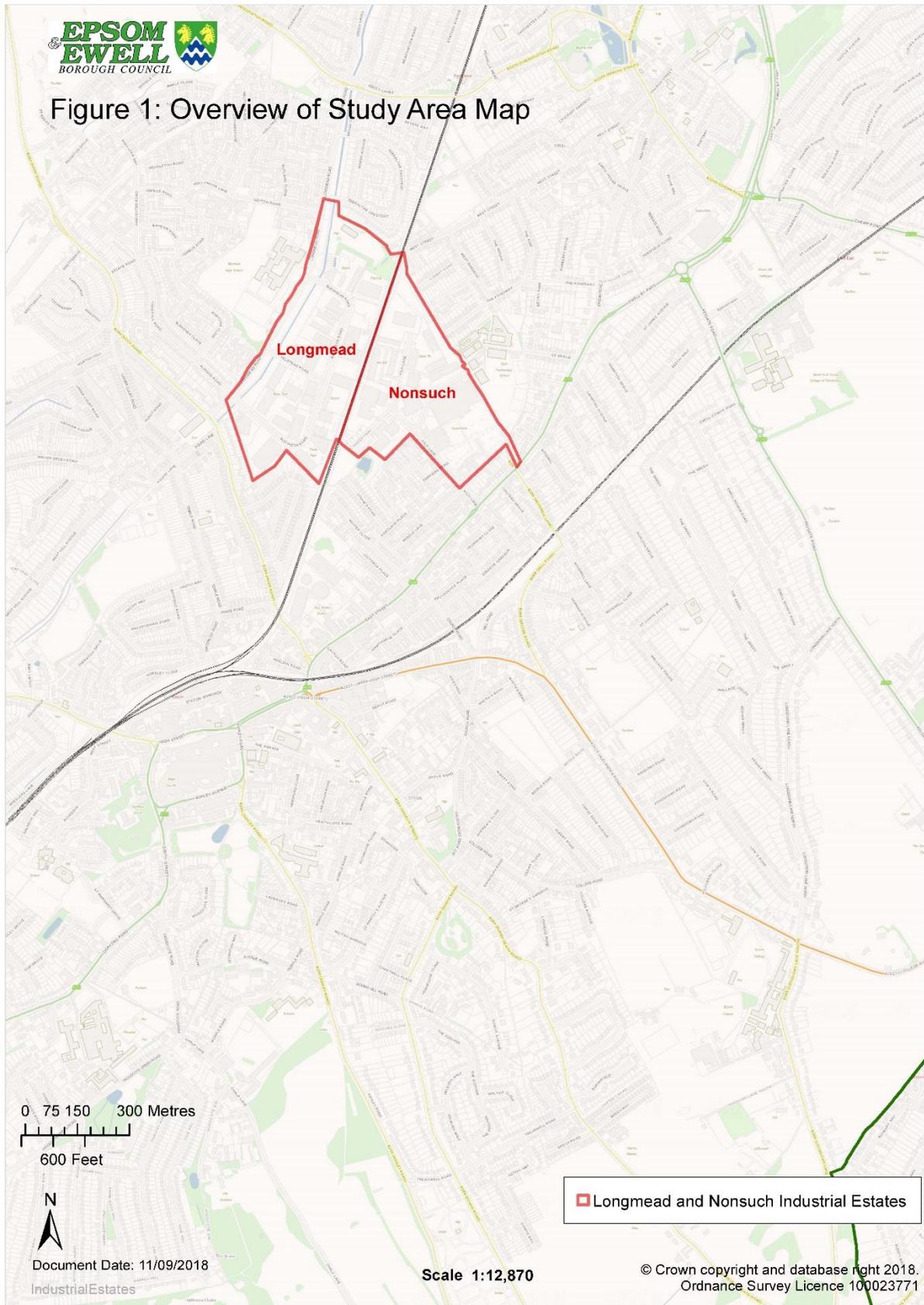
- 1.4.4 The background data was collated into our GIS and subject to further analysis. This was used to create three potential deliverable scenarios. A summary of these scenarios is provided alongside a Strengths, Weaknesses/ Opportunities/ Threats (SWOT) analysis of each.
- 1.4.5 The Study concludes by drawing all of the above actions to provide the Borough Council with a series of Conclusions & Recommendations.

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2. Overview of Study Area

- 2.1.1 The Longmead and Nonsuch Industrial Estates are located to the north of Epsom Town Centre, between the B284 Hook Road and the A24 Epsom Road. They are dissected by the north/ south Waterloo mainline railway line with no direct vehicular access, across the railway line, to each other. The entire site covers an area of approximately 35 hectares. A location plan is included under Figure 1 below.
- 2.1.2 The Longmead Industrial Estate or Employment Area is located to the west of the railway line and is accessed via the Longmead Road. The site is approximately 20 hectares of industrial and warehouse units varying in size from small start-up units to large storage centres.
- 2.1.3 The Nonsuch Industrial Estate or Employment Area is located to the East of the railway line and is approximately 15 hectares. The site includes a large Sainsbury's Superstore, a Halfords and a Wickes. There are a number of smaller scale industrial units set in their own 'business parks' and a variety of car dealership franchises. Again these are of varying sizes and use classes. The site is accessed via Kiln Lane from the junction with the main A24 that runs through the entire Borough. The Industrial Estate is in a highly sustainable and accessible location.

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2.2 Existing Uses across the Study Area

- 2.2.1 There is a diverse range of employment uses across the study area, which are housed in a wide variety of different sized units. The units and their occupiers are identified on a map and list that are included under **Annex 4**. The resident uses mostly fall within the B2 or B8 use class. Many of them have a strong retail element including retail warehouses, units selling trade paints, tyres, blinds and domestic hire shops. For town planning purposes these uses are mostly classified as falling within the Sui Generis Uses class due to their mixed-use nature.
- 2.2.2 There is also a prevalence of motor vehicle sales and repair facilities across both industrial estates. For town planning purposes these fall under both the Sui Generis and B2 uses descriptions. Figure 2 shows a broad overview of the types of uses in different parts of the sites.
- 2.2.3 There are two residential buildings located within the study area, which are the temporary homelessness prevention accommodation units and the new affordable housing units at Maritime Court.



Temporary homelessness prevention accommodation situated on the Longmead Industrial Estate

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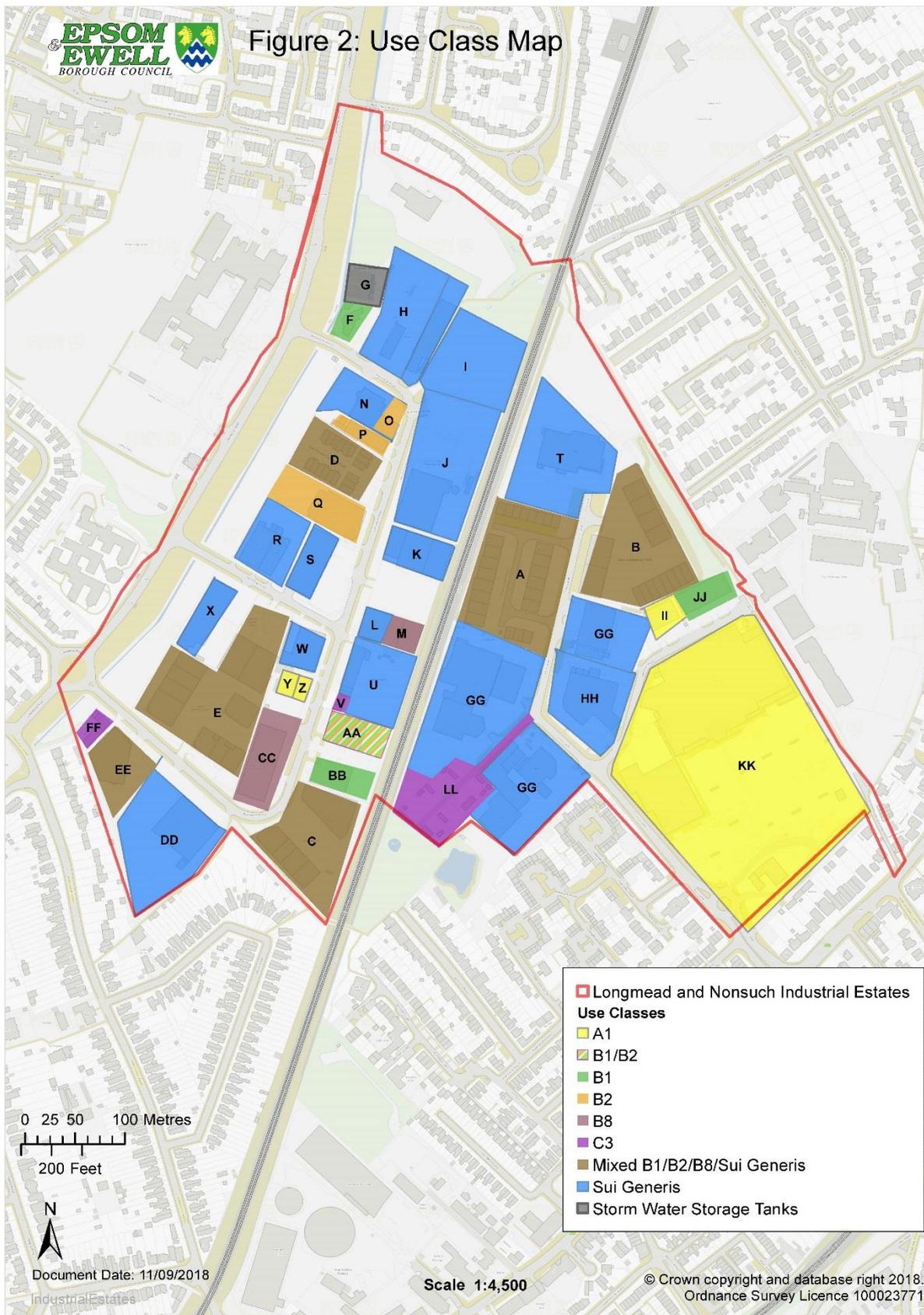


Vacant Industrial Unit on the Nonsuch Industrial Estate

2.2.4 At the time of the site visit there were three vacant industrial units. One of these was located on the Nonsuch Industrial Estate. The other two were located on the First Quarter Business Park.

2.2.5 It was noted that there were also several units being marketed as vacant/ available within Blenheim House; this being a mixed-use office and commercial unit building.

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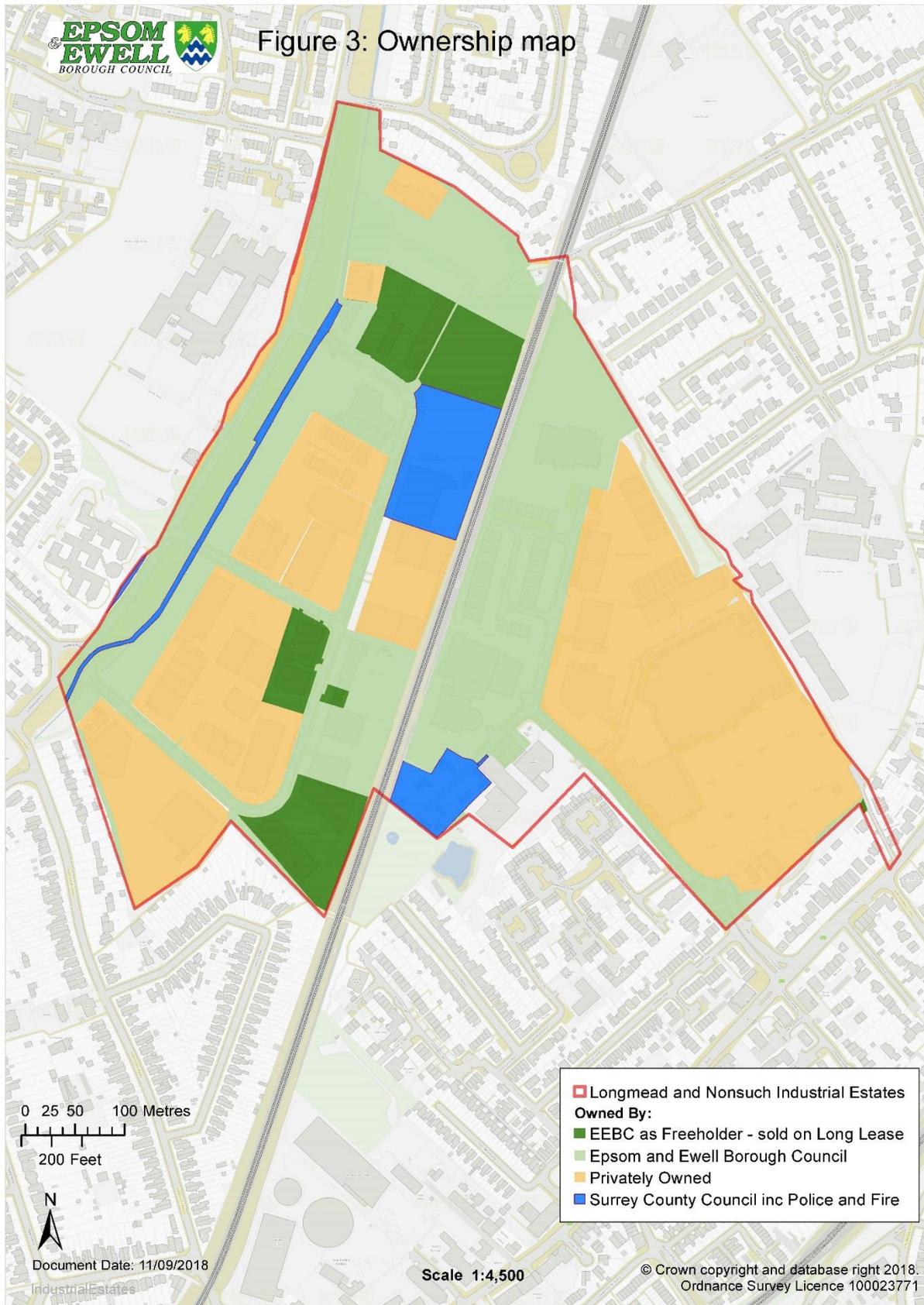


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2.3 Landownership

- 2.3.1 The Industrial Estates are in mixed land ownership including Private Landowners/ freeholders/ leaseholders, the Local Authority and Public Sector (Housing Association). The distribution of landowners is shown on Figure 3 (ownership map).
- 2.3.2 Some landownerships are extensive in and contiguous in coverage across the Industrial Estates. This appears to suggest that subject to interest from these landowners comprehensive redevelopment across meaningful portions of the study area could take place. However, the medium-long term status of these ownerships needs to be carefully considered. Whilst relatively large areas of the study area may fall under a single freeholder, these areas may be subject to long leases, which could serve as a significant constraint to their release for redevelopment.

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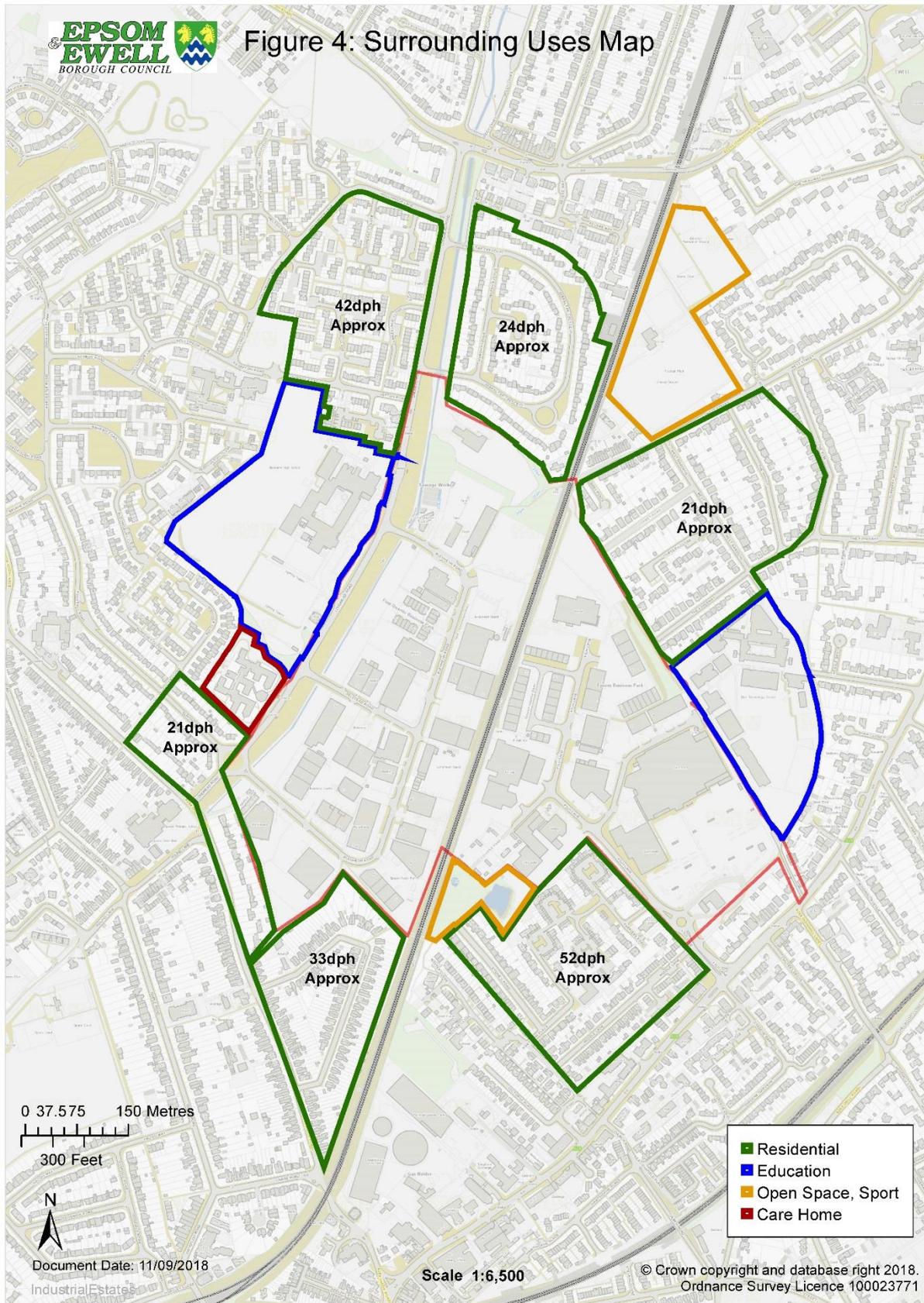


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2.4 *Neighbouring Land Uses*

- 2.4.1 The study area is mainly surrounded by relatively low density residential accommodation, which is comprised mostly of houses with some flats. Surrounding development densities range from 20 dwellings per ha to about 50 dwellings per ha.
- 2.4.2 Two Secondary Schools, a residential care home and open space uses are adjacent to the site. The Ewell Village Conservation Area lays to the north east of the site but has no directly adjoining boundaries (it is separated by the railway line). Figure 4 shows the breakdown of the adjacent land uses and approximate housing densities.

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2.5 Accessibility

2.5.2 The Industrial Estates remain popular with businesses due to their easy access to the M25, A3 and airports. The train services and frequency of these to Waterloo, London Bridge and Victoria also make the site an easily accessible location.

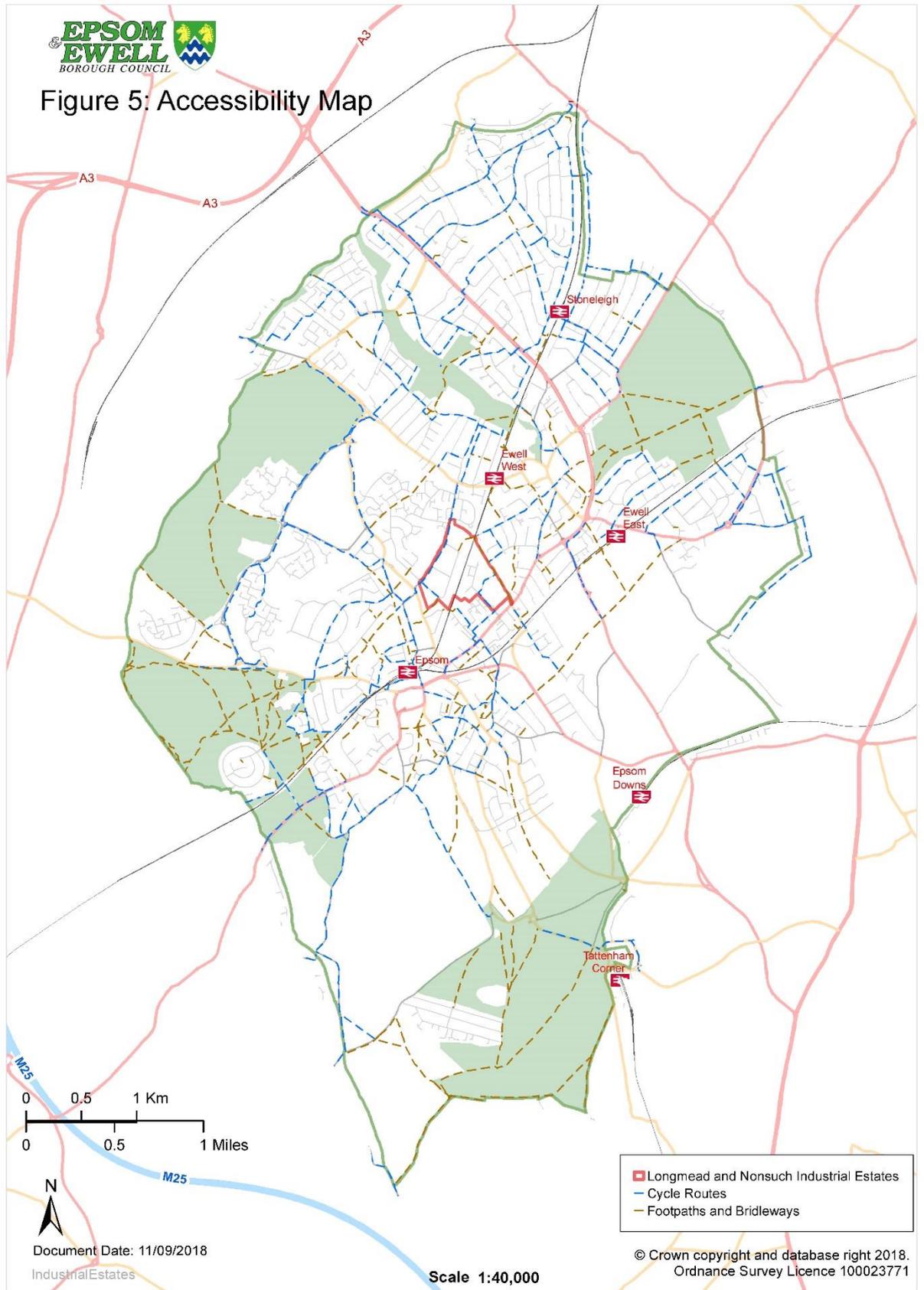
2.5.3 The Longmead Industrial Estate has good access for Heavy Goods Vehicles, particularly in relation the A3 and M25 via the Malden Rushett junction. However, road access from the north and south (via the A24) is constrained by a combination of factors – namely, the road networks through Epsom Town Centre and Ewell Village, and the limited number of bridges/ tunnels crossing the Waterloo railway line. This is an established issue that has generated a variety of proposed solutions, including a major highway improvement ‘the Kiln Lane Link’.

2.5.4 There is further stress to the road network from on-street parking by both employees and customers. Although the study area is well served by pedestrian cycle networks, the nature of the commercial activity has resulted in a culture where most vehicle journeys are car borne – as evidenced by the preponderance of on-street parking across the whole study area. The networks linking the site are shown under Figure 5.

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Figure 5: Accessibility Map



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2.6 Potential Land Use Constraints

- 2.6.1 The desktop review and subsequent site visits have identified two potential land use constraints that are fixed or could result in antisocial/ bad-neighbour impacts to any future scenarios involving new residential accommodation. These are the Thames Water Storage Storm Tanks facility and the Community Recycling Centre and waste transfer station.
- 2.6.2 The Thames Water Hogsmill (Epsom & Ewell) Storm Tanks are located in the north east of the Longmead Industrial Estate. The tanks function as temporary storage during heavy rainfall, for untreated sewage as it travels through the network of pipes towards the Hogsmill Sewage Treatment Works. Although as yet unconfirmed by Thames Water, the Study assumes a worse-case position that this is not a use that can easily be relocated. The Study makes this assumption because of - its location adjacent to the Green Lanes Stream for occasional discharge purposes. In summary, the facility is already in an ideal location and relocation could be prohibitive in cost.



Thames Water sewage storm tanks site

- 2.6.3 A combined Community Recycling Centre (CRC) and waste transfer station are located within the Longmead Industrial Estate. A number of years ago this site was considered as being operationally no longer fit for purpose and a larger alternative site was being sought for waste uses. However, changes to the layout of the existing site, a reduction in the demand by the public for the CRC facility (due to changes in doorstep waste collections) along with a lack of finance and a suitable alternative site have rendered the proposed relocation untenable. Any future redevelopment of the two Industrial Estates will therefore need to consider this use, the difficulties in relocating it and the potential implications it will have as a 'bad neighbour' alongside residential uses.

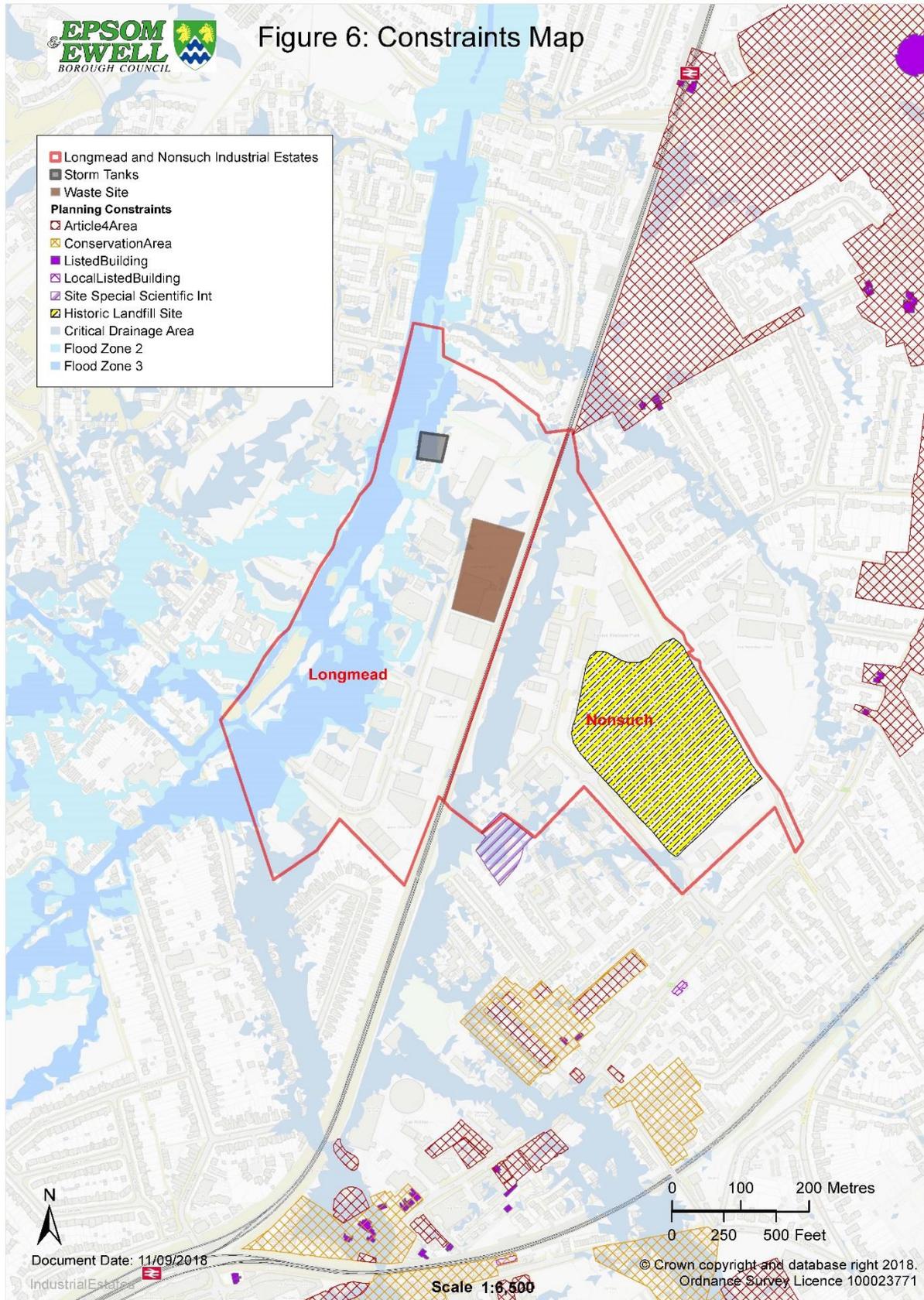
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- 2.6.4 The Study has identified other additional planning and development constraints. These are shown under Figure 6 (constraints map).
- 2.6.5 Much of the west of the site, along the boundary with Longmead road and the Green Lanes Stream is designated as Flood Zones 2 or 3. Some of the flood zone extends through Felstead Road and the Longmead Business Centre. National planning policy requires the application of a sequential approach to site allocation- seeking development sites within areas of lowest flood risk in the first instance (Flood Zone 1). In simple terms this requires that future residential sites are identified within areas of lowest flood risk in the initial instance. Only if it can be demonstrated that there are no suitable sites within these areas (of low risk) should alternative sites (possibly in areas of higher risk) be contemplated.



Open space adjacent to the Green Lanes stream

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Summary of Findings

- The commercial activities across the two Industrial Estates are visibly thriving.
- There are very few vacant units and a wide range of successful occupants.
- The commercial representation across the Industrial Estates is diverse; being comprised of employers operating at local, national and international scale. This is a strong indicator of the positive vitality and viability of both Estates as commercial locations.
- Many of the buildings have clearly had recent investment to improve their facilities. This indicates that many current occupiers intend to remain on the site for the foreseeable future.
- There are some areas of the site that are in single ownership which could mean that they are more likely to come forward for redevelopment in the shorter term.
- Landownership, particularly in terms of the legal status of long leases (and their associated break clauses) may not provide a panacea for the rapid comprehensive redevelopment of the Industrial Estates.
- The Industrial Estates are well located in relation to the highway network with a good level of accessibility to the A3 and M25 via the Malden Rushett junction. However, highway access from the north and south (from A24) is relatively constrained; especially for heavy goods vehicles. Nevertheless, there is no evidence that latter constraint has not adversely impacted upon the demand for commercial accommodation within either Industrial Estate.
- There is stress on the road network from on-site parking
- Two 'bad neighbour' uses have been identified. These are the Sewage storm tanks and the waste facility. The relocation of these uses is problematic as both uses are already in established sustainable locations.

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3. Assessment of Findings and Development of Site Options

3.1.2 The above assessment has highlighted a number of issues, which will inform and influence any potential redevelopment (for new residential accommodation) on the two Industrial Estates. The Study applies the outputs from the assessment to guide the future development options in terms of what could be potentially achieved on the sites. These findings and their implications for the development of potential future options for the industrial sites are considered below.

3.2 *The Quantum of Retained Commercial Floorspace*

3.2.2 It is clear from the evidence that both the Longmead and Nonsuch Estates are performing well, as indicated by the low vacancy rates (only 3 vacant units at the time of the site visit) and recent investment in a number of the units across the site. Other evidence also supports this position. The Economic Growth Survey (2014), carried out on behalf of Surrey County Council, also supports this through testimonial evidence from a number of the businesses, who expressed that the Industrial Estates provide them with a successful trading area, and as a consequence they state that they have no plans to relocate. On the basis of this evidence the two Industrial Estates still appear to fulfil their roles as the Borough's primary location for industrial / warehouse/ storage uses.

3.2.3 However, it is noteworthy that over time the industrial focus of the two Estates appears to have become diluted. This is demonstrated through the significant number of sui-generis uses currently trading across the two Estates. Annex 1, shows a number of these which have been permitted. Most of the Sui-Generis uses on the sites fall into two categories, being either uses which are a mix of B2 (general industrial) or B8 (storage and distribution) but have a greater retail focus (such as trade counters), or are car related uses such as showrooms. The latter are highlighted as becoming particularly visible and numerous across the sites. It is important to emphasise that these sui-generis uses retain a strong employment focus and make a valuable contribution to the economic vitality and viability of the Borough. It is also noteworthy that planning permission would be required for a change of use, even to another sui-generis use. However, these new Sui Generis uses have effectively replaced the B2 uses that had previously traded from the two Estates.

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Mercedes Benz located on the Nonsuch Industrial Estate (Sui Generis)

3.2.4 While the uses on the industrial sites have diversified over time, it is clear that there is still strong market demand for commercial accommodation across both Industrial Estates. On that basis it is reasonable to conclude that if the commercial floorspace offer on the two Industrial Estates were to be significantly scaled down in the future, both commercial activity and employment opportunities would be reduced. This is likely to harm the economic vitality of the Borough. Such harm could be minimised through relocating the industrial uses elsewhere within the Borough. However, given the general lack of development sites and the industrial/'bad neighbour' nature of some of the uses, this would be extremely challenging. It is reasonable to conclude that should such a scenario come forward, the majority of the commercial uses would be forced to relocate outside of the Borough, which would be detrimental to the Borough's economic sustainability.

3.2.5 Consequently, it is recommended that a proportion of commercial floorspace is retained in all of the future redevelopment scenarios under consideration by the Study. Such scenarios could range from retaining the vast majority of the existing commercial floorspace, through to a more intensively used but smaller amount of commercial floorspace, which reflects the needs of the users. Such space would also need to be flexible, being able to adapt to changing business needs in the future.

3.2.6 It is noteworthy that some forms of development, involving changes of use do not require planning permission and will come forward under the 'permitted development' regime. This includes a change of use from B2 or B8 to B1 (business) uses up to a scale of 500m². It also includes temporary permitted development rights in respect of change of use of B8 to C3 (residential) uses under 500m² in scale, subject to prior approval. In respect of the latter the prior approval date must be before 10 June 2019 and the development must be completed within three years. To date there have been no such

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applications that we are aware of on the Industrial Estates, perhaps being another indication of the performance of the Estates.

3.3 *Development Viability*

- 3.3.2 Evidence shows that there is investor demand for commercial employment sites within industrial employment areas like the Longmead and Nonsuch estates. In contrast, investment in other commercial sectors such as the office market, has fallen in recent years, while investment in industrial estates has remained buoyant, driven by occupier demand.
- 3.3.3 It is generally understood that the changing national retail market has resulted in more retailers wanting to locate in industrial estates, which may better meet their business needs (such as providing greater space, the ability to store/display a larger range of goods and customer vehicle access). This is evidenced on the Estates through the high occupancy rates and the increase in the number of trade counters operating from the site in recent years. In the long term should employment uses remain on site, investor and occupier demand is likely to result in the natural intensification of the employment uses on the sites without local authority intervention.
- 3.3.4 The Industrial Estates are therefore likely to have a high existing use value in property valuation terms. This could significantly affect the viability of any redevelopment. In simple terms, a high existing use value makes it unlikely that the use will change (for example to a new residential use). This is because the existing use is already sufficiently valuable to its landowner and a change of use is unlikely to result in an uplift in value.
- 3.3.5 To counter this any redevelopment would need generate a considerable increase in value. This could equate to new developments being built at a far greater density with taller buildings. It is recommended that this be reflected in the scenarios tested through the Study. However, building at a higher density could negatively impact on the surrounding fairly low density residential areas. This is a further matter that would need to be addressed through the scenario testing.
- 3.3.6 Finally, it is highlighted that should development viability be marginal, it may not be possible to meet the full range of usual policy requirements. For example meeting the affordable housing requirement in full, or achieving the desired standards for open space provision. Consequently the local planning authority would need to make a balanced judgement as to what is considered acceptable. It is likely that bespoke viability studies would be required to ensure policy requirements are maximised should any of the scenarios considered by the Study be investigated further.

3.4 *Densities, Residential Mix and Space Standards*

- 3.4.2 As both of the Industrial Estates border existing residential uses, the principle of introducing new residential uses onto the Industrial Estates may be considered acceptable in respect of the impact on adjoining uses. Being a

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highly accessible location, close to public transport opportunities/local conveniences, higher density residential uses may be considered to be more appropriate. The application of higher densities could also have a positive impact on the viability of any proposed scheme.

- 3.4.3 It is recommended that the scenarios also consider the mix of residential units which could be accommodated. For example, in a scenario where only a small proportion of the site is released for residential use, smaller one or two bed apartments would be more appropriate. However, alternative scenarios that release a greater proportion for residential use could accommodate a greater mix of differently sized residential units with a proportion of family homes; although these may not be in the traditional format but more apartment style. This would reflect the demand for different types of units as set out in the Kingston & North East Surrey Strategic Housing Market Assessment (SHMA). However, viability may be a significant influence on the ultimate mix of units in any scheme.
- 3.4.4 In order to meet local housing needs, the scenarios must take account of the need for new affordable homes as this is a considerable area of need highlighted in the SHMA. The inclusion of affordable homes may also help make the loss of any commercial floorspace more palatable, although this will be subject to numerous other considerations.
- 3.4.5 Securing new affordable housing provision will inevitably be subject to development viability. It is anticipated that this could be a significant issue. Consequently, it is recommended that all relevant parties explore all reasonable opportunities for external funding to maximise the provision of affordable homes. For example the government's recent announcement (September 2018) of a £2 billion fund to increase the supply of homes for social rent highlights that such opportunities are available.
- 3.4.6 To ensure the wellbeing of future residents and the long-term sustainability of any potential residential development, national space standards should be met. This is in accordance with current Local Plan policy. The application of this policy has proven successful and does not appear to affect the delivery of new housing. Securing the national space standards (as a minimum) is considered a key component of sustainable development and as such this requirement is considered non-negotiable.

3.5 Building Height

- 3.5.2 In light of the revised NPPF (July 2018) and the shortage of available sources of housing land supply within the Borough, the local planning authority has stated that it is acutely aware of the need to optimise the use of available development land. Indeed [a recent report](#) to the Borough Council's Licensing & Planning Policy Committee (May 2018) highlighted this issue. It is noteworthy that the local planning authority has acknowledged that this approach is likely to result in some sites being developed at higher densities with taller buildings than current adopted policy would allow (Development Management Policies DM11 and DM13 respectively).

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- 3.5.3 In terms of possible redevelopment scenarios, it is considered that taller buildings are likely to be required to some degree to assist with viability and to deliver the scale of new housing that would help justify the loss of commercial floorspace. The number and specific location of any taller buildings could vary depending on the amount of residential uses each scenario was seeking to deliver. It is also recognised that unit build costs increase with the height of buildings, so there may be a viability 'limit' as to how tall buildings could be.
- 3.5.4 Retro fitting higher density development within an existing low density suburban setting is challenging. It is suggested that taller buildings would be more suitable towards the centre of the sites. This would enable a graduation of building heights towards the residential areas which are mostly two storey. A range of building heights can also help to moderate the impact of taller buildings.

3.6 *Open Space Provision*

- 3.6.2 By their very nature the Industrial Estates contain little open space. However, there is an area of open space to the north of the site, which provides some separation between the Longmead industrial site and the adjacent residential area. Additionally, a strip of open space runs along the west of the Longmead industrial site which acts as a buffer to the Green Lanes stream and is mostly designated as flood zones 2 and 3.
- 3.6.3 Introducing residential uses onto the Estates, particularly those at a higher density will require additional open space provision. The greater the amount of residential uses, the greater the amount of open space that is likely to be required to serve the development. This additional provision may take the form of private communal open space or public open space; both making a positive visual contribution to the public realm and townscape.
- 3.6.4 It is unlikely that any of the possible scenarios would secure new houses with private gardens as this would reduce the number of units which could be accommodated, and negatively affect development viability. Nevertheless, private open spaces such as balconies should be incorporated into any apartment style buildings. Open space could also be utilised to provide a level of separation between the residential and commercial uses, particularly those of an 'industrial/bad neighbour' nature.

3.7 *Light and Building Separation*

- 3.7.2 As mentioned above, there needs to be some consideration as to how the residential and commercial uses on site will be separated. In particular, taller buildings will require greater building separation to ensure suitable living / working conditions for future occupants. This could be achieved through the utilisation of open spaces or a graduation in building heights. The NPPF suggests that local authorities take a flexible approach in applying policies or guidance relating to daylight and sunlight, where they would otherwise inhibit

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making efficient use of a site (as long as the resulting scheme would provide acceptable living standards).

3.8 Transport Infrastructure

- 3.8.2 As set out in the overview of the study area, the two Industrial Estates benefit from a good level of accessibility. They are relatively well connected to the highway network and within easy reach of both Epsom and Ewell West Stations. However, the railway line, which transects the site, can function as a constraint to vehicle movements; particularly in respect of larger commercial vehicles. This could be addressed as part of any redevelopment. Equally, whilst major highway schemes (such as the Kiln Lane link) are unlikely to be viable or deliverable, improvements could be made to the existing pedestrian and cycle access.
- 3.8.3 Vehicle parking is also a major consideration. Given the sustainable location and accessibility of the two Industrial Estates, it is suggested that future redevelopment scenarios could consider a flexible application of residential parking standards. As car use and ownership changes over time, it is conceivable that future scenarios could explore the potential for genuinely car-free residential developments. However, in spite of these possibilities many of the remaining commercial uses will continue to require on-site parking provision and space for deliveries by heavy goods vehicles. Future redevelopment scenarios must incorporate such provision if such mix-use redevelopment proposals are to be successful.
- 3.8.4 The redevelopment scenarios must incorporate provision for sustainable transport improvements, such as safe cycle (including secure cycle parking) and pedestrian routes within the development. Such improvements will need to be separated from commercial road traffic, such as HGVs, which will also need to access the site.

3.9 Availability

- 3.9.2 During 2014 Surrey County Council, in conjunction with the Borough Council commissioned primary research to be undertaken by the external consultants Economic Growth Management. The purpose of their study was to establish an initial evidence base to support a revised economic case in support of the Kiln Lane Link Road major highway improvement scheme. This involved interviewing a significant number of the landowners, freeholders and major leaseholders on the Longmead and Nonsuch Industrial Estates to establish their aspirations for the future. They were asked whether there were any known plans for relocation or expansion of the organisation/ business at the site. Although this information is no longer fully representative of the site (as some of the parties involved no longer operate from the Industrial Estates), it does provide valuable intelligence in relation to market demand for commercial space across the two Industrial Estates.
- 3.9.3 It is notable that none of the organisations interviewed were seeking to relocate or comprehensively redevelop (beyond that required for their own

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commercial purposes) but some were considering expansion. More detailed responses can be found under Appendix 5.

- 3.9.4 This provides strong evidence that the site is functioning well as an employment site and that some of the site owners are planning to invest further to maintain the site in commercial use. There is further evidence to support this position; namely in the form of investment that has occurred on some sites over the past couple of years, such as the SGN and Ford Transit sites.
- 3.9.5 It is noted that the Local Planning Authority has made contact with a number of commercial operators who have recently implemented mixed-use schemes that may provide a template for some of the redevelopment scenarios considered by the Study. Typically, these mixed-use schemes are comprised of industrial, manufacturing or bulk storage uses on the ground/ lower floors, with high density accommodation on the upper floors. In most of the examples that had been implemented, the buildings were in excess of ten storeys in height, a requirement largely necessitated by development viability.
- 3.9.6 It is noteworthy that in most cases the upper floor accommodation was not conventional market or affordable housing but specialised accommodation (frequently student housing). This suggests that the housing market remains nervous and is not entirely comfortable with developments that mix housing with industrial or manufacturing activities. As already noted there is a propensity for the latter activities to be perceived as bad neighbours. This suggests that house builders and buyers may not be ready for this type of housing.
- 3.9.7 Contact with the development industry also revealed other key considerations. In event that a willing commercial operator comes forward with a proposal to develop their operational site they will require a new site, in close locality to their existing site, onto which they can temporarily relocate. Within the context of this process, an operator could require that temporary site for at least two years, whilst their permanent home is transformed into its new mixed-use form. This requirement demands comparable/ suitable sites to be available in the locality. Businesses cannot suspend their commercial activities – they need to remain seamlessly operational.
- 3.9.8 The Study has already noted that the two Industrial Estates have low site vacancy rates. It is tempting to assume that a landowner could redevelop an unoccupied site speculatively, offering a generic commercial site at the ground and lower floors. However, this type of solution may only attract a limited customer base as those commercial operators seeking out mixed-use opportunities will want a bespoke property that meets their precise needs. On that basis, the inability to meet these key requirements will serve as a significant constraint to mixed-use developments being implemented during the forthcoming Local Plan period.

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SGN Headquarters on the Longmead Industrial Estate

3.10 Summary of recommendations for development scenarios

- A quantum of commercial floorspace should be retained in all of the development scenarios. Losing a large amount of floorspace could have a significant negative effect on the economic vitality of the Borough. Where possible, efforts should be made to intensify the commercial uses taking into account the needs of future users.
- Viability will be a key consideration. With the likely high existing use value of the commercial uses the viability of residential development will be under pressure.
- As a result, residential development will need to be of a higher density, with taller buildings. However, to ensure the wellbeing of future residents, the national space standards should be adhered to.
- Where possible, a mix of dwelling sizes should be incorporated. While it is recognised that viability constraints may result in a greater proportion of smaller units, there should be a proportion of family sized homes to meet the needs identified in the Strategic Housing Market Assessment.
- Affordable homes should be included, although viability issues may make this challenging.
- Open space will need to be provided to serve the residential units, improve the public realm and, where possible, provide some degree of separation from the commercial uses.
- Some level of parking for private vehicles should be provided, although this should be minimal due to the sustainable location of the sites.

4. Potential Redevelopment Scenarios

4.1 Scenario 1 - Retention of the majority of the site as Employment Land



4.1.1 This scenario envisages the retention of the majority of the site as employment land, broadly in accordance with its current uses. Opportunities

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for new residential uses may arise on an ad-hoc basis and the commercial uses may naturally intensify over the years.

4.2 Key Components to this Approach

- Possible redevelopment of a series of smaller sites for commercial uses at ground floor with residential uses above
- Residential uses are likely to be comprised of smaller one and two bed units
- Likely to deliver lower housing yields, possibly 10 to 15 units per ‘site’
- Overall residential yield of approximately 100 to 150 units
- Very limited affordable housing provision as many of the sites are likely to be under the national policy threshold of 10 units
- No direct intervention over the intensification of commercial uses

4.3 SWOT analysis Scenario 1

STRENGTHS	WEEKNESSES	OPPORTUNTIES	THREATS
Retains a large proportion of successfully performing commercial floorspace in a highly accessible location.	Lack of intervention may delay the intensification of the commercial uses on site (site may still not meet its full potential).	Retains the long-term opportunity for natural intensification	Limited residential development does little to help meet the Borough’s significant housing need.
Commercial land continues to be available to meet market demand.	Housing delivery is severely limited – likely to be on smaller sites and through an on an ad hoc basis.	Council could pre-actively work with land owners to intensify specific sites in individual ownership.	Limited amount of affordable housing (due to less housing and smaller piecemeal development).
Leaves the market to deliver residential units where viable.	Piecemeal residential development within an existing industrial estate is unlikely to result in comprehensive redevelopment that includes the desired high quality living conditions. This could include developments lacking in amenity space/ parking/ landscape due to limited space.	Retains the potential for the Borough to support the changing retail demand for more space/ access/ trade counter style shopping that industrial sites can offer and traditional High Streets are struggling to meet.	Leaving delivery to the market has no certainty.
Market forces are likely to lead to the intensification of the commercial site over time.	Less opportunity for a mix of size and type of units desired- more likely to be smaller units.		Residential development coming through the permitted development route may result in sub-standard size units/ amenity/ infrastructure (as is happening with some office buildings).
The provision of adequate floorspace helps to maintain the economic viability of the Borough.	This option does not optimise the residential or commercial potential of the site due to the lack of masterplan.		
Retains suitable sites for otherwise difficult to locate ‘bad neighbour’ uses.			
The impact on surrounding residential areas in minimal (no wholesale development).			

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<p>Reduced risk of complex and costly site land assembly process.</p> <p>A more deliverable scenario.</p>	<p>Residents would be living within a commercial area that would not necessarily be conducive of high quality living.</p>		
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4.4 Scenario 1 Conclusion

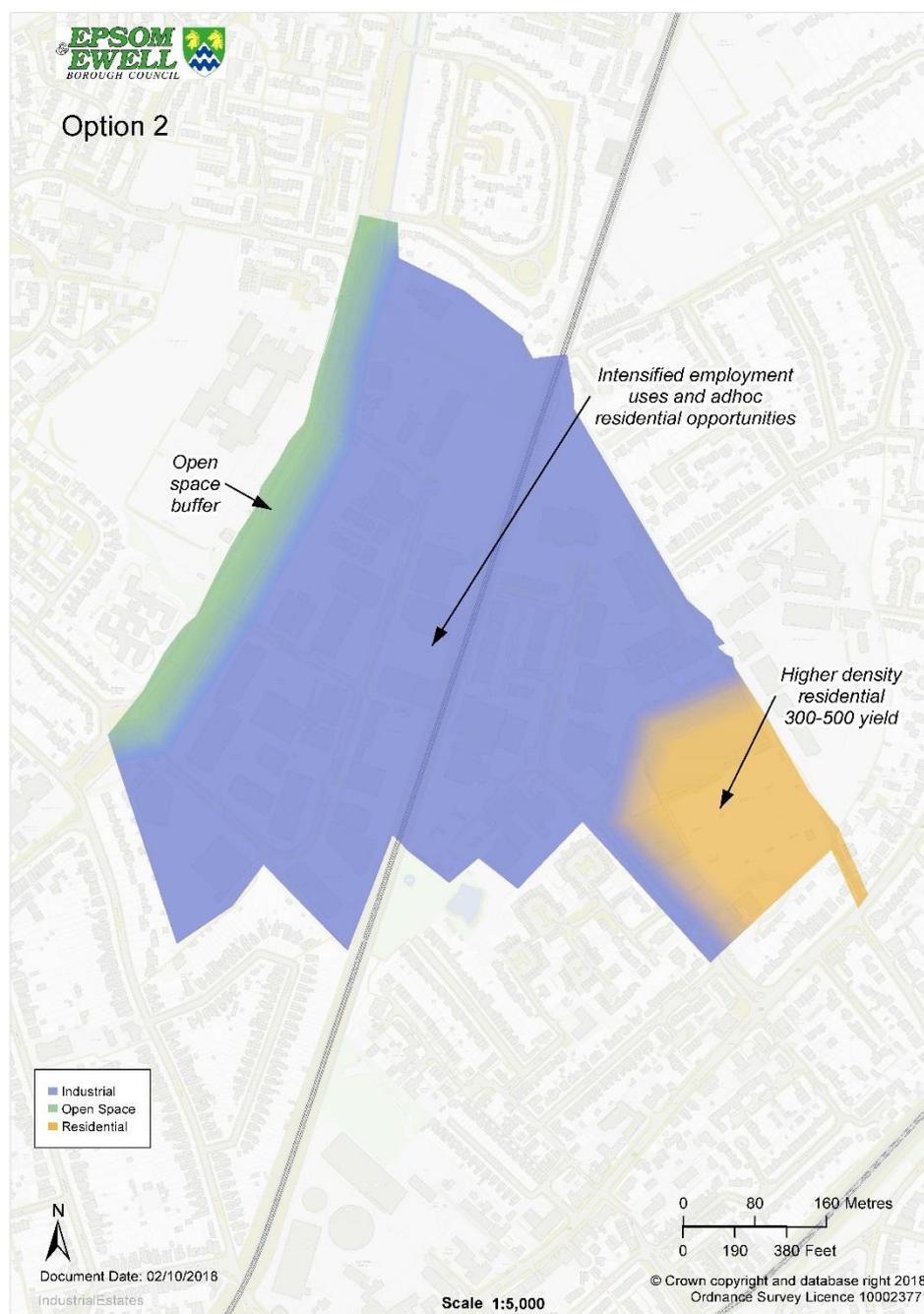
- 4.4.1 This scenario could be implemented with minimum intervention from the local planning authority. The only significant action that would be necessary for this happen would be the revocation or softening of the Local Plan’s employment policies.

- 4.4.2 The scenario would result in a significant quantum of employment land being maintained which would help meet the needs of the economy and safeguard the economic vitality of the Borough. Given that the Estates are currently well performing it is likely that this will continue into the foreseeable future. Allowing market forces to influence the Estates means they will continue to evolve, probably intensifying the land uses over time. This may happen at a slower rate and in a more ‘unplanned’ fashion without intervention but it would be in response to natural market forces.

- 4.4.3 However, the Study concludes that an approach that allows market forces to be the sole driver for delivering new housing on the Estates would result in a very limited number of housing units being brought forward. This is because of the likely high existing (commercial) The high existing commercial land values do not incentivise changes in uses – as such changes would provide marginal uplift in land value. This scenario is therefore unlikely to make a meaningful contribution to housing land supply. Additionally, the introduction of residential uses in an unplanned way could result in the gradual erosion of the Estate’s commercial nature. This could restrict the type of commercial operations to those that could operate alongside residential uses.

- 4.4.4 The Study concludes that this approach could result in the piecemeal loss of viable, occupied and fit-for-purpose employment floorspace. This position is supported by evidence of what happened to the Borough’s office floorspace portfolio following the changes to the permitted development regime. Those changes generated a rapid loss of viable, occupied and Grade A office stock across Epsom Town Centre, which triggered the need for the urgent serving of Article 4 Directions in order to manage the potential for such change.

4.5 Scenario 2 – Redevelopment of a proportion of the area as high density residential accommodation



4.5.1 This scenario envisages the redevelopment of a proportion of the site that is within one landownership for high density residential use. The rest of the site would be retained as employment land where the intensification of commercial uses would be encouraged and residential opportunities could arise on an ad-hoc basis.

4.6 Key Components to this Approach

- Larger site for residential redevelopment, possibly around four or five hectares.

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- Density would need to respect surrounding development patterns (for example lower densities adjacent to existing residential uses graduating to higher densities in the centre of the site) .
- This could deliver a range of housing with denser buildings towards the centre of the site, perhaps up to 6 storeys (at approximately 300 dph)
- Possible overall average density across site could range from 70 units/ha to 120 units/ha (NB densities will vary across site)
- Possible yield could range from 334-574 units
- Affordable housing yield at 40% could range between 133 units to 230 units
- Limited car parking due to site’s proximity to town centre
- Provide some degree of separation from the industrial uses to the north
- Opportunities for high quality landscaping and public realm

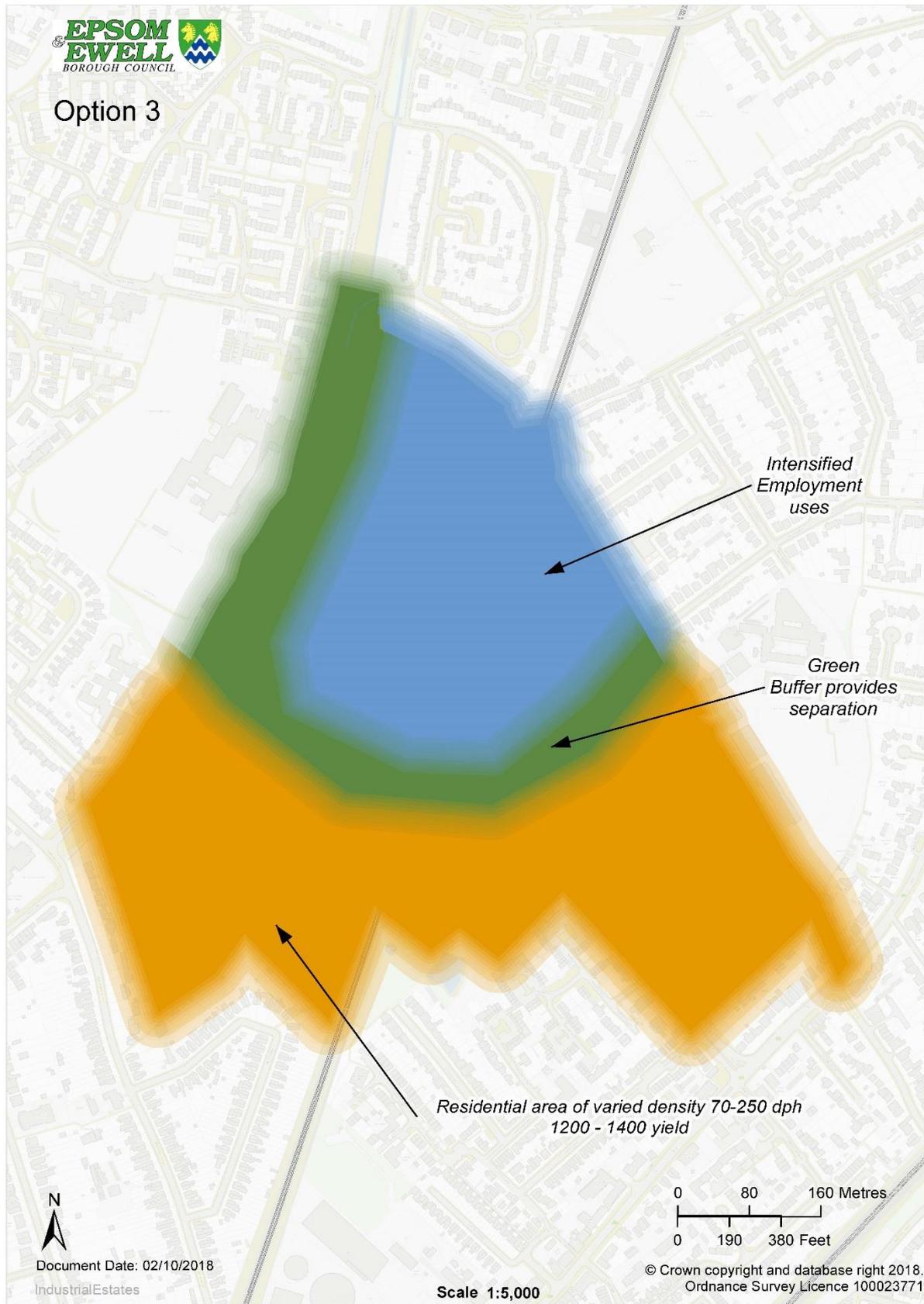
4.7 SWOT analysis of Option/ Scenario 2

STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
<p>Land in a single ownership could potentially make the process simpler.</p> <p>A masterplanning approach provides a more comprehensive redevelopment of the site to include infrastructure/ amenity/ open space etc.</p> <p>Retains the majority of successfully performing commercial floorspace in a highly accessible location.</p> <p>Continues to provide for high market demand for commercial units on part of the site.</p> <p>Leaves the market to deliver residential units where viable in the commercial part of the site.</p> <p>Helps to maintain the economic viability of the Borough through providing adequate floorspace- which has been shown to be in high demand.</p> <p>Retains suitable sites for otherwise difficult to locate ‘bad neighbour’ uses.</p>	<p>Losing a proportion of currently well performing commercial floorspace. This means the loss of some economic activity in the Borough and employment opportunities.</p> <p>Would require intervention to deliver this scenario in the short term. This would be at a high cost and with significant risk.</p> <p>Limited potential for taller/ higher density buildings compared to larger scale redevelopment.</p> <p>Limited potential to provide open space provision.</p> <p>Limited housing numbers in comparison to scenario 3.</p> <p>Less opportunity for a mix of size and type of units desired- more likely to be smaller units.</p>	<p>Potentially easier to deliver due to single land ownership.</p> <p>Opportunity for comprehensive masterplan allowing for planning for amenity space/ access/ open space/ landscaping and higher standards.</p> <p>More opportunity for affordable housing delivery</p> <p>Higher density could provide a range of units types.</p>	<p>Potentially harmful to the economic vitality of the Borough through the loss of important and currently well-performing employment floorspace that is unlikely to be replaced.</p> <p>A moderate level of housing delivery would still result in unmet housing need. Other options to meet this need would need to be considered (such as Green Belt sites).</p>

4.8 Scenario 2 Conclusion

- 4.8.1 The Study concludes that this scenario is more likely to be implemented in the long term; beyond the forthcoming Local Plan period. There is currently no evidence that suggests that any of the major landownerships, across the two Industrial Estates are exploring opportunities to dispose of their assets or relocate. On the basis of the available evidence, this scenario would require a significant change in the commercial land market for it to be delivered. For example, the Study envisages that this could occur if businesses transferred their operations to on-line/ warehouse style shopping format and as a consequence trade counters were no longer viable. Equally a similar shift could be generated by significant changes within the motor industry, particularly in relation to motor car ownership and usage. It is possible that this could happen during the life of the new Local Plan but there is great uncertainty as to how such changes in these industries would impact on their land use requirements. For example it is equally possible that a move away from private car ownership (to an app-based culture) would still require a significant land-take; for the storage and maintenance of an app-provided fleet.
- 4.8.2 Nevertheless, if the Borough Council were committed to delivering this scenario it could still be possible to do so. However, the Study concludes that the delivery of this scenario during the new Local Plan period is likely to require significant intervention and investment by the Borough Council and its partners. This would not be without risk.
- 4.8.3 The piecemeal loss of employment land that could still happen under this option across the two Industrial Estates would, in the absence of any alternative provision elsewhere in the Borough, have an adverse impact upon the local economy.

4.9 Scenario 3 – Comprehensive Transformation



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4.9.1 This scenario envisages the comprehensive redevelopment and transformation of both Industrial Estates in their entirety. This scenario would be comprised of high density residential and intensified employment uses provided in the most appropriate locations across the sites.

4.10 Key Components to this Approach

- A masterplan approach for the comprehensive redevelopment of the Estates
- Density would need to respect surrounding development patterns (for example lower densities adjacent to existing residential uses graduating to higher densities in the centre of the site).
- This could deliver a range of housing with greater densities towards the centre of the site, perhaps up to 8 storeys (at approximately 400 dph)
- Possible overall average density across site could range from 70 units/ha to 250 units/ha (NB densities will vary across the site)
- Possible yield could range from 1260 units to 2700 units
- Affordable housing yield at 40% could range between 500 units to 1080 units
- Adequate open space would need to be provided on site and could also provide some degree of separation from the industrial uses
- Limited car parking provision due to site's sustainable location
- Wholesale redevelopment could provide opportunities for high quality landscaping and public realm
- Opportunities for improved pedestrian and cycle access across the site.

4.11 SWOT analysis of Option/ Scenario

STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
<p>Delivery of high quality commercial units in line with market demand</p> <p>Would deliver a significant number of housing units</p> <p>A masterplanning approach provides a more comprehensive redevelopment of the site to include infrastructure/ amenity/ open space etc.</p>	<p>There are many parts of the site that have already been subject to significant investment making them unlikely to be viable or desirable to redevelop</p> <p>Losing a large proportion of currently well performing commercial floorspace would be likely to have a significant impact on the Borough economic activity levels and employment opportunities.</p> <p>High land values making such an option costly to deliver could result in desirables such as affordable housing or space</p>	<p>Proactively redevelop existing commercial to a higher intensity to meet modern business needs.</p> <p>Opportunity for comprehensive masterplan allowing for planning for amenity space/ access/ open space/ landscaping and higher standards.</p> <p>Opportunity for separation between industrial and residential resulting</p>	<p>Potentially serious harm to the economic vitality of the Borough by losing important and currently well- performing employment floorspace that can never be replaced.</p> <p>Delivery would involve intervention and significant costs/ risk.</p> <p>Land hungry commercial uses would be pushed out potentially against the market wishes.</p> <p>Industrial/bad neighbour commercial uses are likely to find it difficult to</p>

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	<p>standards being compromised.</p> <p>Challenging to deliver due to complicated mix of landowners/ freeholders/ leaseholders</p> <p>Would require significant intervention to deliver. This would likely be at high cost and come with risks on public sector money.</p>	<p>in a better standard of living for new residents.</p> <p>More opportunity for affordable housing delivery</p> <p>Higher density could provide a range of units and taller buildings could be graduated.</p>	<p>relocate to an alternative site.</p> <p>There is still likely to be a shortfall in meeting our housing need.</p>
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4.12 Scenario 3 Conclusion

4.12.1 This scenario results in a fully comprehensive redevelopment of the site, including infrastructure, amenity space and other master planning components. However this scenario could only be implemented in the long term; which is likely to be beyond the forthcoming Local Plan period as there is no evidence that suggests that any of the major or smaller landownerships, across the two Industrial Estates are exploring opportunities to dispose of their assets or relocate. The evidence shows that all sites are performing well as employment sites and that the economic activity is thriving. As with scenario 2 this scenario would require a significant change in the commercial land market for the occupiers/ owners to actively seek to vacate the area. Although commercial uses would be intensified on site it is highly unlikely that all commercial uses could be re-provided. This would have a negative impact on the local economy as these businesses are unlikely to find any other suitable site in the borough and to move elsewhere. In land availability terms, for any operational site to redevelop their site they will require a new temporary site in close locality to the existing site to allow them to remain operational.

4.12.2 If the Borough Council were committed to delivering this scenario during the plan period it would require significant intervention, investment and complicated land assembly which would likely come at a high cost to the public sector in the current market. This significantly reduces the deliverability of this scenario.

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5. Conclusions and Recommendations

- 5.1.1 The main purpose of this study is to evaluate the potential of the industrial estates for housing. The three emerging scenarios could provide a range of housing from approximately 100 units up to 2,700 units, while retaining varying degrees of commercial floorspace.
- 5.1.2 However, the Study concludes that there is no certainty to any of these approaches. No evidence has been found to indicate that any of the sites across both Industrial Estates are genuinely available for redevelopment for non-commercial uses. The evidence demonstrates that there are very few vacant units across both Industrial Estates; there is a diverse range of well-established commercial activities; and that there is strong evidence of recent and on-going investment in the existing commercial uses and operations. The evidence demonstrates that both Industrial Estates are economically vibrant and viable as commercial/ employment locations. They make a very positive contribution towards the Boroughs economic vitality and viability that would be difficult to replace or replicate elsewhere during the Local Plan period.
- 5.1.3 It is particularly noteworthy that the National Planning Policy Framework 2018 Paragraph 121 states that employment land should only be used for housing if it would not undermine key economic sites. On the basis of the evidence the Study concludes that the possible redevelopment of the two industrial estates for a mix of commercial and residential uses would undermine the commercial offer of the Estates as employment sites. This would have an adverse impact on the economy of the Borough. Given the scale of demand for housing land across South West London and North East Surrey the Study concludes that it will be difficult to identify viable alternative sites for any displaced employment uses. This would have a profound long term impact upon the local economy.
- 5.1.4 The Study identifies a number of significant constraints to the prospect of mixed-use development coming forward on this site during the Local Plan period. These constraints include practical operational matters, such as lack of land for temporary relocation; development viability constraints, namely that existing uses are very successful, so accordingly land prices and value remain very high; and 'industrial/bad neighbour' uses, which suggest that satisfactory living conditions for future residential uses would not be met. The Study concludes that the necessary mitigation measures that would be required to respond to this matters, in order to introduce new housing development across both Estates, would be costly and problematic to put in place.
- 5.1.5 It is highlighted that the first scenario, comprised of modest ad-hoc residential development, would only deliver a small number of new homes. This scenario would result in piecemeal development for a relatively small housing yield. The potential housing yield from this scenario would have little impact on the Borough's identified housing need whilst having a negative impact on the overall economic vitality of the site.

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- 5.1.6 This study concludes that the re-development of the Nonsuch and Longmead Industrial Estates is not a viable option for housing delivery within the new local plan period. There are currently no market drivers to suggest that there is any desire or ambition to comprehensively redevelop these two sites for mixed-use development. On that basis the Study concludes that the mixed-use redevelopment of the two Estates is currently not viable and unlikely to happen during the life of the new Local Plan.
- 5.1.7 Although a possible scenario involving aggressive intervention to realise a comprehensive mixed-use development may appear attractive, the Study concludes that under current market conditions this would prove an extremely costly exercise. The outcomes from such an intervention are uncertain. There is no evidence of demand from the local commercial markets for mixed-use employment typologies and as a consequence intervention (by the local planning authority) would be loaded with significant risk. More tellingly, the Study demonstrates that the overall scale of new housing that could be realised through such mixed-use development would not make significant inroads into the Borough's housing requirement. In conclusion, the Borough Council would still have to consider other sources of housing land supply to meet the bulk of the Borough's objectively assessed housing need.
- 5.1.8 Both Industrial Estates function well in terms of their existing commercial uses. Together they serve as the principle economic/ industrial hub for the Borough. Any loss of economic activity would seriously undermine the economic vitality and viability of the Borough. This consequential impact is a significant consideration to any proposals to identify either as housing allocation sites. Given the comparatively modest scale of new housing that could theoretically be delivered through the mixed-use redevelopment of the two Estates, the loss of the existing commercial and the consequential impact on the local economy is considered too high a price to pay.

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Recommendations

- 5.1.9 The Study recommends that the emerging Local Plan continues to designate and safeguard the two Estates as strategic employment sites. As such, future site allocation policies should seek to optimise and intensify the employment and commercial activities across both sites. It is recommended that proposals for new purely non-commercial uses, including residential accommodation be actively discouraged as being inappropriate for the long term economic viability of the two Estates. Proposals that seek to introduce mixed-use development; possibly comprised of commercial uses at the lower levels and residential accommodation to the upper floors, should be considered on their individual merits. It is recommended that such proposals provide a full economic assessment of the impact of the new residential uses upon the long-term economic vitality and viability of the two industrial estates. At the very least these assessment should demonstrate a neutral long-term impact.
- 5.1.10 Given some of the significant land-use constraints present across the two Estates, the Study recommends that the mixed-use proposals must demonstrate that they can deliver appropriate mitigation measures, in addition to being policy compliant. The Study considers this a critical consideration. The redevelopment of the Estates as mixed-use sites should not be sought at any cost – to either the Borough’s economy, the provision of affordable housing, or the delivery of high quality building design.
- 5.1.11 In parallel with the above approach, the Study recommends that the new Local Plan actively encourages industrial/ employment sites located outside of the town centre and employment areas to relocate to these more suitable locations. This approach supports to intensification of these uses in these areas and further strengthens their role as strategic employment sites. This will help to release alternative and more appropriate land for housing. The Study considers that this approach will maintain the employment areas for industrial/ economic uses and free up essential land for high density housing development.
- 5.1.12 A Borough-wide Transformation Masterplan is currently being prepared. It will consider how the Borough will seek to optimise housing delivery through higher density, taller and well-designed buildings in the future. The Masterplan will need to assess potential policy approaches to the industrial sites that could be called upon if ad-hoc applications were to come forward in the future. This could also be used if the market was to change and the industrial/ employment floorspace become less economically strong and the sites became more viable as housing developments. The Study recommends that the Masterplan take full account of the evidence, conclusions and recommendations set out herewith.

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Appendices

Annex

1. List of planning history
2. Marketing booklets
3. Spreadsheet of units and map
4. Sample of landowner aspirations 2014

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Annex 1
Longmead and Nonsuch Industrial Estates- Sample of planning applications

08/01038/FUL
Allam Motors
Unit 12
Felstead Road
Change of use of front part of Unit 12 from B2 (General industrial) use to a motor car showroom (Sui generis use)
PERMITTED 01/09

13/00882/CLP
Unit 24 & 25
Nonsuch Industrial Estate
Certificate of Lawful Development for proposed B8 (Storage and Distribution) use with ancillary retail.
PERMITTED 12/13

13/00950/COU
Citilink
5 Roy Richmond Way
Change of Use from B8 (Storage or Distribution) to Motor Vehicle Showroom/Workshop (Sui Generis).
REFUSED (Insufficient detail on loss of employment land)

14/00384/FUL
The Pavilions
1 Weston Road
Demolition of office building (B1) and the construction of a new car servicing centre (B2) including ancillary office space (B1) and car showroom (sui generis) with ancillary infrastructure works and new landscaping.
PERMITTED 9/14

14/00995/COU
Unit 18
Nonsuch Industrial Estate
Change of use from B1(c) to B1c/B2/B8 Class of Use for installation of MOT test bay.
PERMITTED 12/14

15/00263/FUL
Longmead Industrial Estate
2 - 3 Blenheim Road (Ford)
Change of use including partial demolition and refurbishment of existing B8 distribution warehouse building to sui generis motor dealership including showroom, parts storage, workshop for vehicle servicing and maintenance, MOT testing, offices and ancillary staff and customer facilities, external vehicle display, car parking, wash bays and plant room, fencing and landscaping.
PERMITTED 07/15

15/01623/FUL
Wilson's Automobiles and Coachworks
Kiln Lane
Erection of two-storey showroom extension to existing car dealership.
PERMITTED 4/16

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15/01700/ADV

Howdens

Unit D1

Longmead Business Centre

Two non-illuminated fascia signs and one non-illuminated freestanding sign.

PERMITTED 12/15

15/01844/FUL

SGN Depot

Unit 21D

5 Roy Richmond Way

Refurbishment and alterations to existing building including demolition of lean-to structure, internal alterations/layout changes, upgrading external cladding, alterations to door and window openings, creating ramp access, external boundary, drainage, surfacing, storage and parking works.

PERMITTED 5/16

16/00641/ADV

Unit D2

Longmead Business Centre

Blenheim Road

Replacement of old signage with 6 fascia signs and 1 post sign.

PERMITTED 9/16

16/00772/FUL

Dagenham Motors

Kiln Lane

Erection of new car wash facility, alterations to elevations including new cladding, installation of new roller doors and other minor alterations to fenestration. Installation of two fascia panels on west elevation (non-illuminated) over front entrance.

Permitted 11/16

16/00126/COU

Dagenham Motors

Kiln Lane

Change of use from sale of motor vehicle parts and repairs/servicing (sui generis) to sale of motor vehicles, motor vehicle parts and repairs/servicing (sui generis).

Permitted 7/16

16/00517/FUL

Sainsburys

Kiln Lane

The construction of a new retail concession pod to west of store entrance and the erection of two no. trolley shelters adjacent to existing trolley shelters.

PERMITTED 8/16

Epsom & Ewell Borough Council
The Longmead and Nonsuch Industrial Estates Capacity Study

16/01109/FUL

Sainsburys

Kiln Lane

Erection of first floor mezzanine for storage associated with retail concession at ground floor

PERMITTED 12/16

16/01832/FUL

Units 1 - 2 Felstead Road

Alterations to interior layout, creation of new opening to the external wall to make a new shop entrance. Installation of a new external Canopy over an external entrance and alterations to parking layout

PERMITTED 5/17

Epsom & Ewell Borough Council
The Longmead and Nonsuch Industrial Estates Capacity Study

Annex 2
Marketing information

Our Ref: DK/1Q

SUBJECT TO CONTRACT

DATE AS POSTMARK

Dear Sir/Madam,

FIRST QUARTER, EPSOM, SURREY, KT19 9QNwww.firstquarterepsom.co.uk

Please find attached the details of several modern office, production/storage units which are now available for occupation.

The units comprise modern 2 storey business units offering a mix of high quality offices to the first floor and warehouse business space to the ground floor. Facilities include car parking, three phase power, roller shutter loading door, gas central heating and an eaves height of 10' 4".

The units are available on new full repairing and insuring leases for a term to be agreed.

UNIT	SQ FT	SQ M	RENT PA	CAR PARKING	RATEABLE VALUE / RATES PAYABLE (18/19)	STATUS
13	1,544	143.43	£27,500	3 (plus loading bay)	£21,000 / £10,080	Available
15	1,544	143.43	£27,500	3 (plus loading bay)	£21,000 / £10,080	Available

Energy rating: Unit 13 – D (88) Unit 15 E (101)

For further information or specifications please do not hesitate to contact David Keates of Cattaneo Commercial on 020 8546 2166 or our joint agents Bridger Bell.

Yours faithfully,

CATTANEO COMMERCIAL

Enc

FIRST QUARTER

1Q

EPSOM, SURREY KT19 9QN

**MODERN HIGH QUALITY
FLEXIBLE BUSINESS UNITS
TO LET**

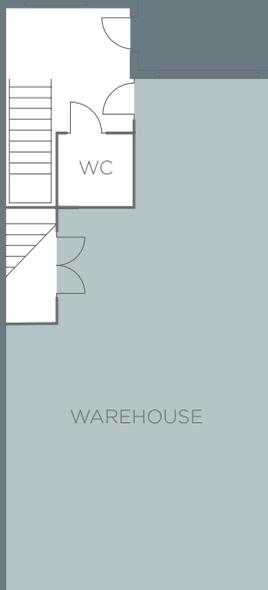
firstquarterepsom.co.uk

FIRST QUARTER 1Q

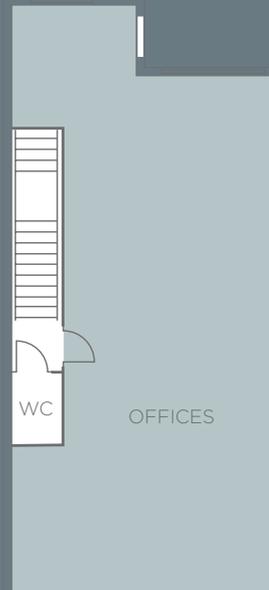
A development of modern 2 storey business units offering a mix of high quality offices and warehouse business space

First Quarter is less than half a mile from Epsom Town Centre and is situated on Blenheim Road in the Longmead Estate, Epsom's premier business location.

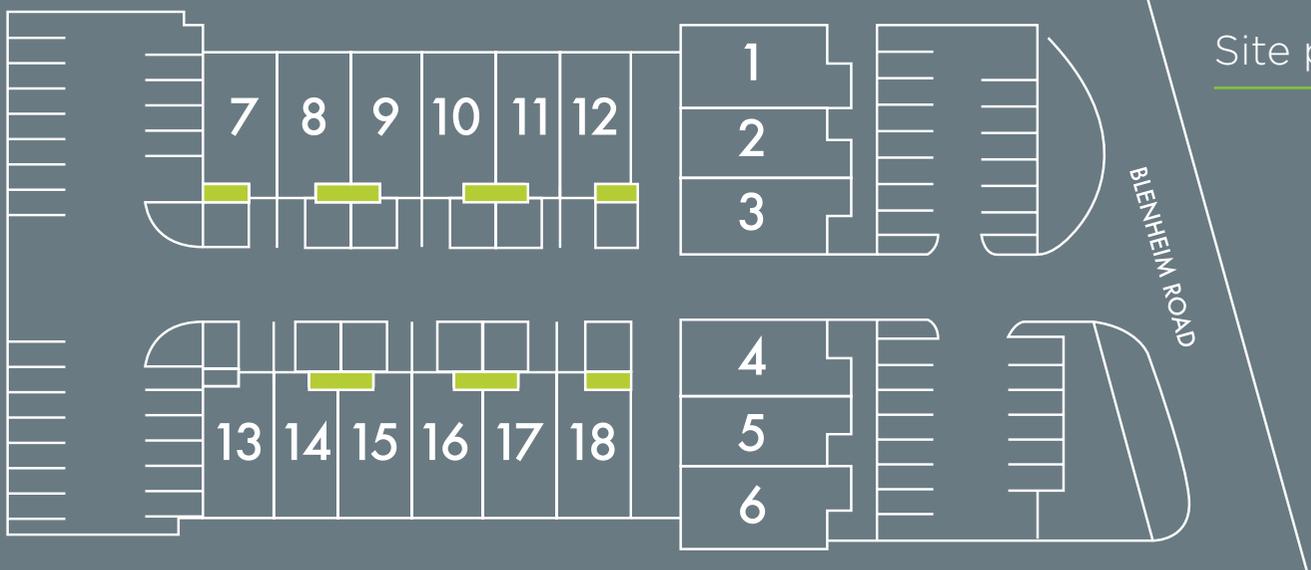
Epsom is ideally situated for access to the M25, the A3, central London, Heathrow and Gatwick Airports. Epsom Station has a regular service to Waterloo, Victoria and London Bridge.



Typical ground floor plan.



Typical first floor plan.



Site plan

Description

The accommodation comprises refurbished first floor offices with open plan ground floor warehouse / light industrial space which benefits from the following:

Amenities Warehouse

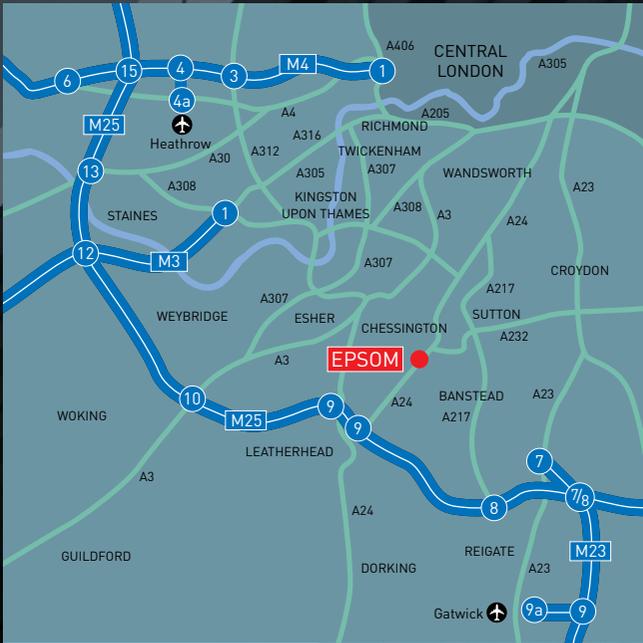
- 3 phase power
- Fluorescent lighting
- Roller shutter loading door
- Gas central heating
- Eaves height of 10' 4" (3.15 m)
- Accessible toilet
- Loading bay

Amenities First Floor Offices

- Fully carpeted
- 3 compartment perimeter trunking
- Suspended ceiling
- Recessed fluorescent lighting
- Ceiling mounted comfort cooling unit
- Gas fired central heating
- Tea station
- Double glazed windows throughout
- Toilet
- On-site parking

FIRST QUARTER 10Q

BLenheim ROAD, EPSOM, SURREY KT19 9QN



Good communications to Central London and M25 motorway.

By Road

Ewell West Station	0.8 miles
Epsom Town Centre	0.9 miles
Epsom Station	1.2 miles
A3	4.0 miles
M25 motorway	5.4 miles
Central London	13 miles
Gatwick Airport	19.4 miles
Heathrow Airport	26 miles

By Rail

From Epsom	
Clapham Junction	21 mins
Guildford	29 mins
London Victoria	35 mins
London Waterloo	36 mins
London Bridge	44 mins
From Ewell West	
Wimbledon	15 mins
London Waterloo	33 mins

TERMS

New full repairing and insuring leases are available for terms to be agreed.

VIEWING

Strictly by appointment through the joint agents.

firstquarterepsom.co.uk



Disclaimer: Bridger Bell and Cattaneo Commercial for themselves and for the vendors or lessors of this property whose agents they are give notice that: (i) the particulars are set out as a general outline only for the guidance of intending purchasers or lessees and do not constitute part of an offer or a contract, (ii) all descriptions, dimensions, references to condition and necessary permissions for use and occupation, and other details are given in good faith and are believed to be correct but any intending purchasers or tenants should not rely on them as statements or representations of fact but satisfy themselves by inspection or otherwise as to the correctness of the property, (iii) no person in the employment of Bridger Bell or Cattaneo Commercial has the authority to make or give any representation or warranty whatever in relation to the property. Compiled November 2016.

For Sale or To Let Modern Light Industrial/ Trade Counter Premises

263.22 sq m (2,833 sq ft)

Unit 10 Epsom Business Park, Kiln Lane, Epsom,
Surrey KT17 1JF



Accommodation: The premises have the following approximate floor areas:

Ground Floor	142.61 sq m	1,535 sq ft
Mezzanine	120.61 sq m	1,298 sq ft

Total Gross Internal Floor Area: 263.22 sq m 2,833 sq ft

All dimensions and measurements are approximate, however these are based upon the principles laid down in accordance with the RICS Code of Measuring Practice.

Description: The modern mid-terrace property is of steel framed construction and offers ground floor warehouse and production space with mezzanine offices/storage.

Mid-Day Court 30 Brighton Road Sutton Surrey SM2 5BN

Centro Commercial Limited believe these particulars to be correct. However, measurements are approximate and some details are collected from external sources and cannot be guaranteed. Accordingly, neither Centro Commercial Limited nor the vendor whose agent they are can be liable in respect of any inaccuracy in these particulars or in any other information, written or oral, supplied to the intending purchaser. Any items quoted do not include VAT where applicable.

The property described in these particulars is subject to availability and to formal contract.



Amenities:

- 3 Phase power
- Roller shutter door
- Eaves height 2.53m
- 500lbs per sq ft floor loading
- WC facilities
- Kitchenette
- On-site parking

Important Note: Centro Commercial have not tested any services, heating system, electrical system, appliances, fixtures and fittings, that may be included in this property and would advise interested parties to satisfy themselves as to their condition or investigating the presence of any deleterious materials.

Location: Epsom Business Park is located off Kiln Lane, opposite Nonsuch Industrial Estate and close to Sainsbury's Superstore. The Business Park is accessed from East Street (A24), and in close proximity to Epsom Town Centre and Mainline BR Station.

The M25 (Jct 9) and the A3 (Tolworth) are approximately 4.5 miles.

Terms: The premises are either available Freehold for sale with full vacant possession, or to let on a new Full Repairing and Insuring Lease for a term to be agreed.

Rental: The commencing rental is **£32,500 per annum exclusive**.

Price: We are instructed to seek **offers in excess of £475,000** for the Freehold interest.

Rates: To be reassessed.

NB: Please note that the rates actually payable may be subject to transitional relief. For a more accurate assessment of rates payable for the current year, please contact the Local Authority.

EPC: The property has a current rating of C (70).

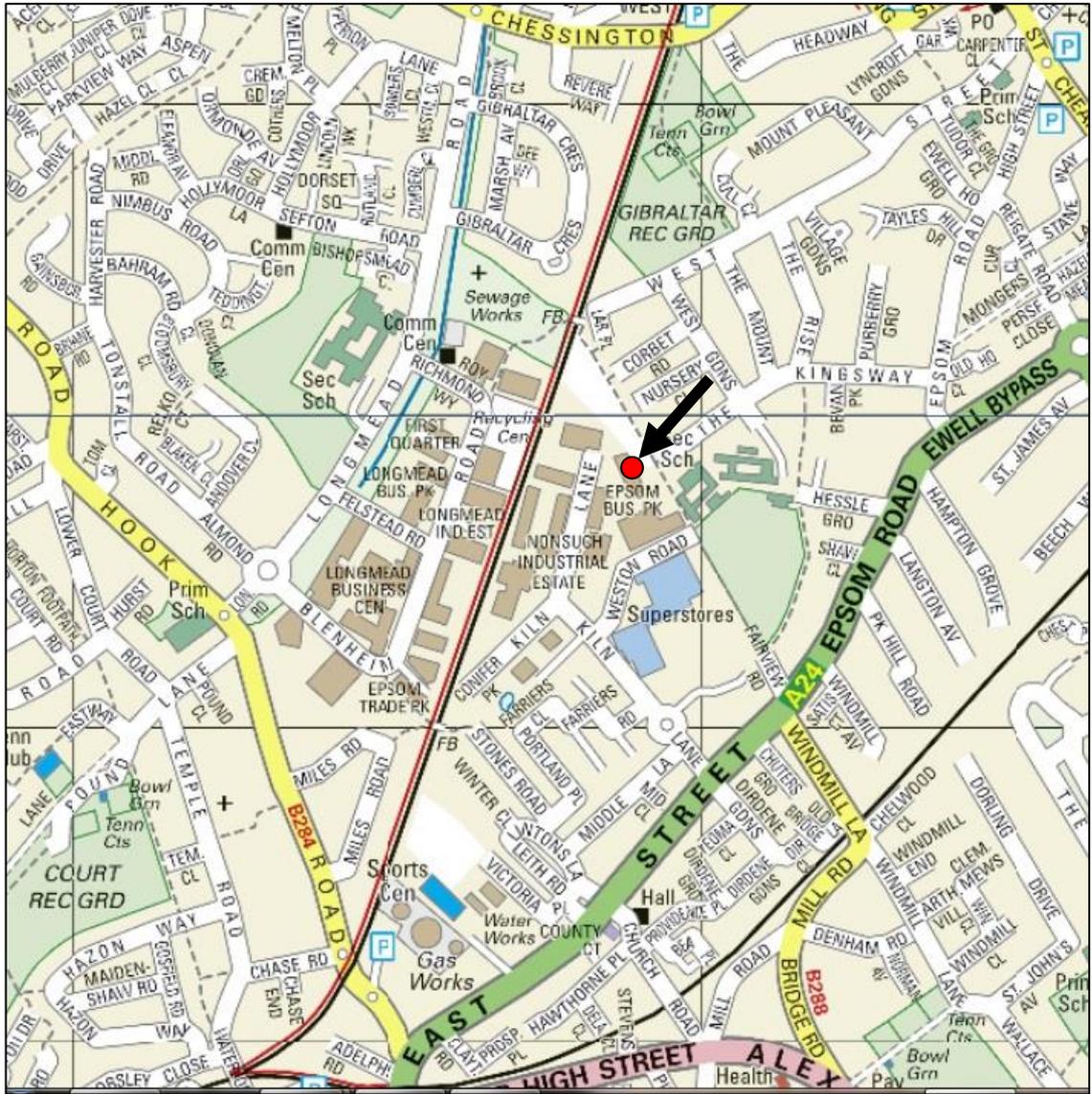
Legal Costs: Each party is to be responsible for their own costs in this transaction.

Viewing: Strictly by appointment through Joint Sole Agents

Centro Commercial Limited
020 8401 1000

Bridger Bell Commercial
01372 730 000

PROPERTY PARTICULARS



Code of Practice: Applicants should be aware that the Code of Practice for Commercial Leases in England and Wales strongly recommends you seek professional advice from a qualified Surveyor, Solicitor or Licensed Conveyancer before agreeing or signing a Business Tenancy Agreement. The Code is available through professional institutions or through the web site <http://www.leasingbusinesspremises.co.uk>.

Mid-Day Court 30 Brighton Road Sutton Surrey SM2 5BN

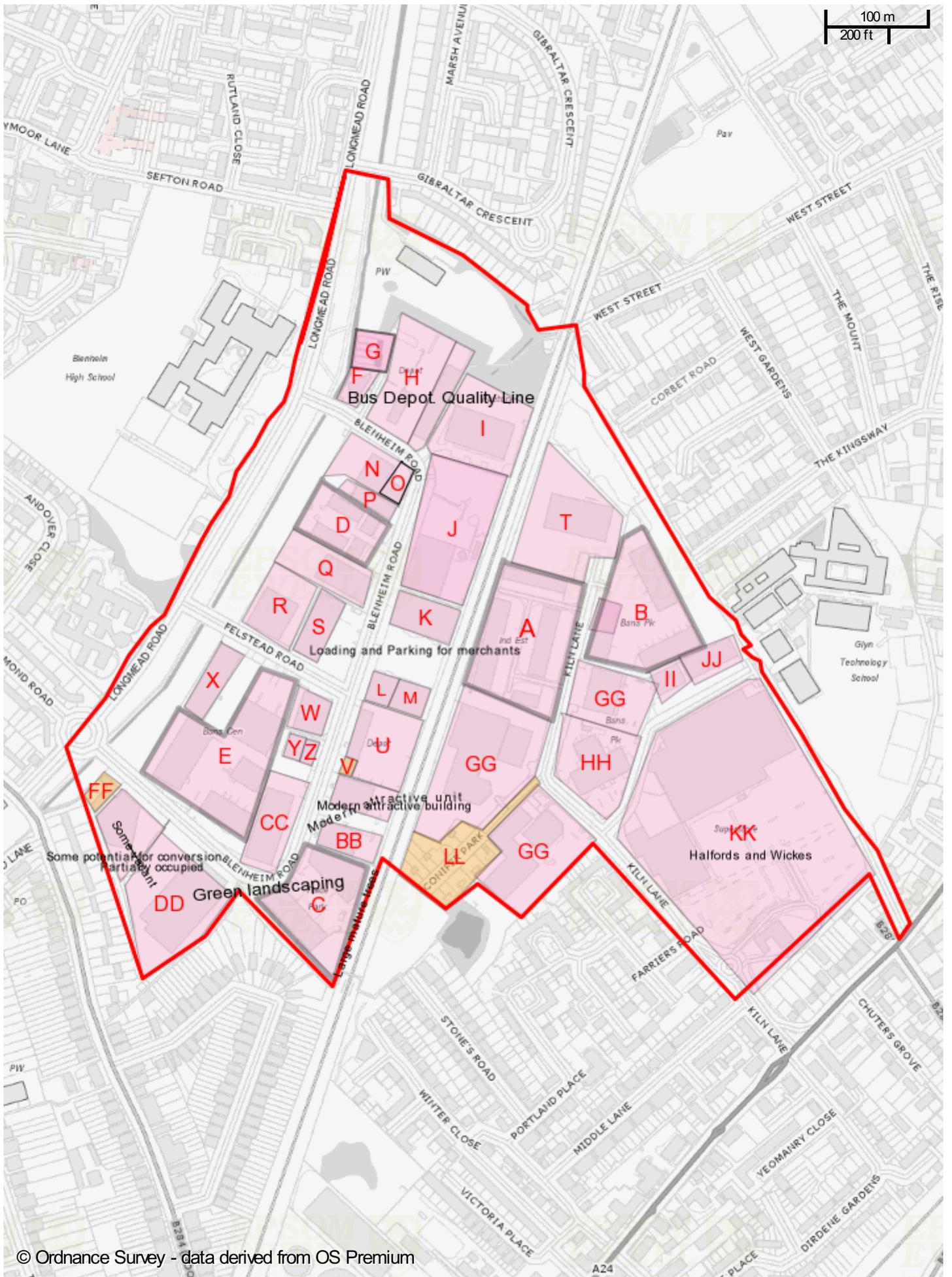
Centro Commercial Limited believe these particulars to be correct. However, measurements are approximate and some details are collected from external sources and cannot be guaranteed. Accordingly, neither Centro Commercial Limited nor the vendor whose agent they are can be liable in respect of any inaccuracy in these particulars or in any other information, written or oral, supplied to the intending purchaser. Any items quoted do not include VAT where applicable.

The property described in these particulars is subject to availability and to formal contract.

Think Property, Think Centro - RESIDENTIAL BLOCK MANAGEMENT - SALES - LETTINGS - NEW HOMES - COMMERCIAL AGENCY - CONSULTANCY - MANAGEMENT

Epsom & Ewell Borough Council
The Longmead and Nonsuch Industrial Estates Capacity Study

Annex 3
Spreadsheet of units and map



EEBC Map
Scale: 1:5000



Map Ref	Organisation	Address/ Freeholder or Leaseholder	2014 Tenure/ Lease info	Notes from site visit	Photo					
A	1-4 Norden Heating Supplies	Nonsuch Industrial Estate, Kiln lane	Picton property Freeholder 25 units leased to various tenants with leases ranging from 6 months to 10 years	1 unit to let (no 22)						
	5 The Tyre Store Ltd									
	6 Marcus Export Ltd									
	7 National blood Service									
	8 Electroco Ltd									
	9 Epsom All Class MOT Service Centre									
	10 Atkins Limited									
	11 Dunraven Manufacturing Ltd									
	12 CS Flooring Contractors									
	13 Star Sign Ltd									
	14 Freedom Flying Ltf									
	15 Marcus Export Ltd									
	16 Harris Carpentry									
	17 Four Seasons Blinds									
	18-19 Miller Autocare									
	20 Electric Center									
	21 Boyden & Co Ltd									
22 vacant										
23 TBS Applications Ltd										
24-25 Toolstation										
B	A1 The Amico Studio	Epsom Business Park, Kiln lane. Various freeholders including AXA	13- Griffield are freeholder and occupier. 14- Simon Smith Flowers are freeholder and occupier. 3,4 and 7 Trade Paints are the freeholders.	The Dialysis Centre is also on this Site. No vacant units and high intensity uses	Photo					
	A2 Reliable Fire Sprinkler Co									
	3 Trade Paints									
	4 FLG Services									
	5 Tucker French Plumping and Heating merchants									
	6 Exponent UK Ltd									
	7 Rowcolour Printing									
	8-9 European Process Plant Ltd									
	10-11 Target One Field Sports Ltd									
	12b IntraLAN Group PLC									
	13 Griffield Ltd									
	14 Simon Smith Flowers									
	C					1 HSS Hire	Epsom Trade Park, Blenheim Road	No info	large trees along the railway line and footpath through to residential	Photo
						2 Automatove Trade Supplies Ltd				
3 HPS heating Plumping Supplies Ltd										
4 Screwfix										
5&6 Storage King										

[Photo](#)

[Photo](#)

[Photo screwfix](#)

[Photo Storage King](#)

D	1-3 Stulz UK	First Quarter Business Park, Blenheim Road	Canada Life Investments freeholder for all 18 units	2 units to let	Photo
	4 Interactive Media Group				
	5 Direction Fire				
	6 Trafag Sensors and controls				
	7 Intrepid Group				
	8 & 9 Clover Environmental				
	10 MDSI Europe Ltd				
	11 Bidatask Ltd				
	12 Stego UK				
	13 To Let				
	14 Zestan UK				
	15 To Let				
	16 Metrel UK Ltd				
	17 Blenheim				
18 Fairlight Designs Ltd					
E	A1 Graham Plumbing and heating	Longmead Business Centre, Felstead Road		No vacant units. Large communal parking and turning area	Photo
	A2 Ford Retail Ltd				
	A3 Mould Growth Consultants Ltd				
	A4 Sartorius Mechantronics UK Ltd				
	B1 Ergonomic Solutions				
	B2 Majestic Solutions				
	B3 City Plumbing				
	C Addex Group				
	D1 Howdens Joinery				
	D2 Kitchens and Joinery				
F	Marial Arts Centre/ Boxing Club/ Youth Centre	The Stephen Woods Centre, Roy Richmond Way		Adjacent to sewage storm tanks. These uses are compatible with residential and the building if of lower quality than some newer buildings nearby. These uses may be easier to re-locate than manufacturing/ industrial uses.	Photo
G	Thames Water Sewage Storm Tanks	Blenheim Road		Not compatible with residential uses	Photo
H	Quality Line RATP Group- Bus garage/ Depot	Roy Richmond way		Was Epsom Coaches	Photo

[Photo
Stulz](#)

[Photo
Howdens](#)

I	Scotia Gas Networks	Roy Richmond way		Modern building that has had lots of recent investement	Photo
J	SCC Civic Amenity Site	Blenheim Road. SCC owned.		Not compatible with residential uses	
K	Hitchcock and King	Blenheim Road		This part of the estate serves three timber merchants and requires large turning and loading areas and large storage areas	Photo
L	Flooring Specialists	Blenheim Road			
M	Travis Perkins	Blenheim Road			
N	Kitchens and bathrooms	Blenheim Road			
O	MoT Centre	Blenheim Road			
P	Epsom Car Care Centre	Blenheim Road			Photo
Q	Accident Repair centre	Blenheim Road			
R	Allams Skoda	Felstead Road	Freeholder and Occupier		
S	Wolsley	Felstead Road			
T	Wilsons Bargain Buys	Kiln Lane			
U	Longmead Depot (EEBC)	Blenheim Road			
V	EEBC Temporary Accomodation	Blenheim Road			Photo
W	Joinery Showroom	Blenheim Road/ Felstead Road		More run down unit than most on the site, low density. If looking at the site on its own it may have some potential but small site adjacent to high intensity industrial uses	Photo
X	Shelley Motors	Felstead Road			
Y	WECS Tools	Blenheim Road			
Z	Tens care	Blenheim Road			Photo
AA	Photo-Me	Blenheim Road		Modern Attractive unit. This site may have more potential to be compatable as a residential mixed use site	Photo
BB	Awe 'state of the art' HQ	Blenheim Road		Modern Attractive unit. This site may have more potential to be compatable as a residential mixed use site	Photo
CC	Tchibo Coffee International Ltd	Units 7 and 8 Blenheim Road	Warehouse and Premises (VO)	Very large warehouse unit	Photo

DD	Ford	Blenheim Road			
EE	Blenheim House- various uses including King Fu and Book Co	Blenheim Road		Some vacant units here (1 or 2). This is a more B1 focused building with some potential for conversion or redevelopment- residential flats at Maritime Court next door.	Photo
FF	Maritime Court (residential)	Blenheim Road		Residential	
GG	Wilson's (Used cars)	Kiln Lane	50 years lease		
HH	Mercedes Benz	Kiln lane (The Pavillions).	New site at the Pavillions		Photo
II	Domex Appliances				
JJ	Capita			Offices (at first we thought these were vacant)	
KK	Sainsburys, Halfords and Wickes		Wickes is a tenant and lease expires 2034. Halfords expires 2029		
LL	Gypsy and Traveller Site	Conifer Park, Kiln Lane	SCC- pitches rented individually	Fully Occupied with additional pitches required over next 15 years.	

Epsom & Ewell Borough Council
The Longmead and Nonsuch Industrial Estates Capacity Study

Annex 4

Economic Growth Management
Study on behalf of Surrey County Council into the Kiln Lane Link (2014)

Responses from landowners/freeholders and major leaseholders on the Longmead and Nonsuch industrial estates when questioned as to their future aspirations for their sites.

Summary of responses:

Allams Motors (R): Business would consider adding another floor to add value to the property.

AXA (B): The organisation would consider redevelopment if they were able to act as the master planner or in collaboration with another party, or as part of a consortium. The properties are held in a long-term fund to meet the financial expectations of policyholders and over the course of the next few decades the fund will be closed in order to pay out to them.

Canada Life Investments (D): The estate has been purchased to provide income for a commercial property fund, the criteria for which dictates that income must derive from industrial property. It is emphasised that the site was not bought with any intention of redevelopment. Canada Life emphasised that the tenants are the priority. Should several units be vacant for a period of time, with no interest shown from the type of tenants the estate currently attracts, the organisation would willingly consider redevelopment for higher end employment use. It would need to be led by market demand, and meet the criteria of the commercial property fund.

Griffith Ltd (B): No plans to expand or relocate

Picton Property (A): Considered to be a very successful trading area with high demand.

Sainsburys: Some inner London stores do incorporate space for other business uses on top of the retail store

Trade Paints (3B): See the only option to expand would be vertically.

Wilsons (GG/ T): Wilsons admitted that their business, as with others in the motor trade, is 'space hungry', and consequently has also contemplated the idea of a multi-storey car park for display purposes, although it is not aware of any previous examples of this and therefore is unsure whether it is feasible.