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Mansfield District Council Employment Land Needs Update

Mansfield District Council

22 October 2025

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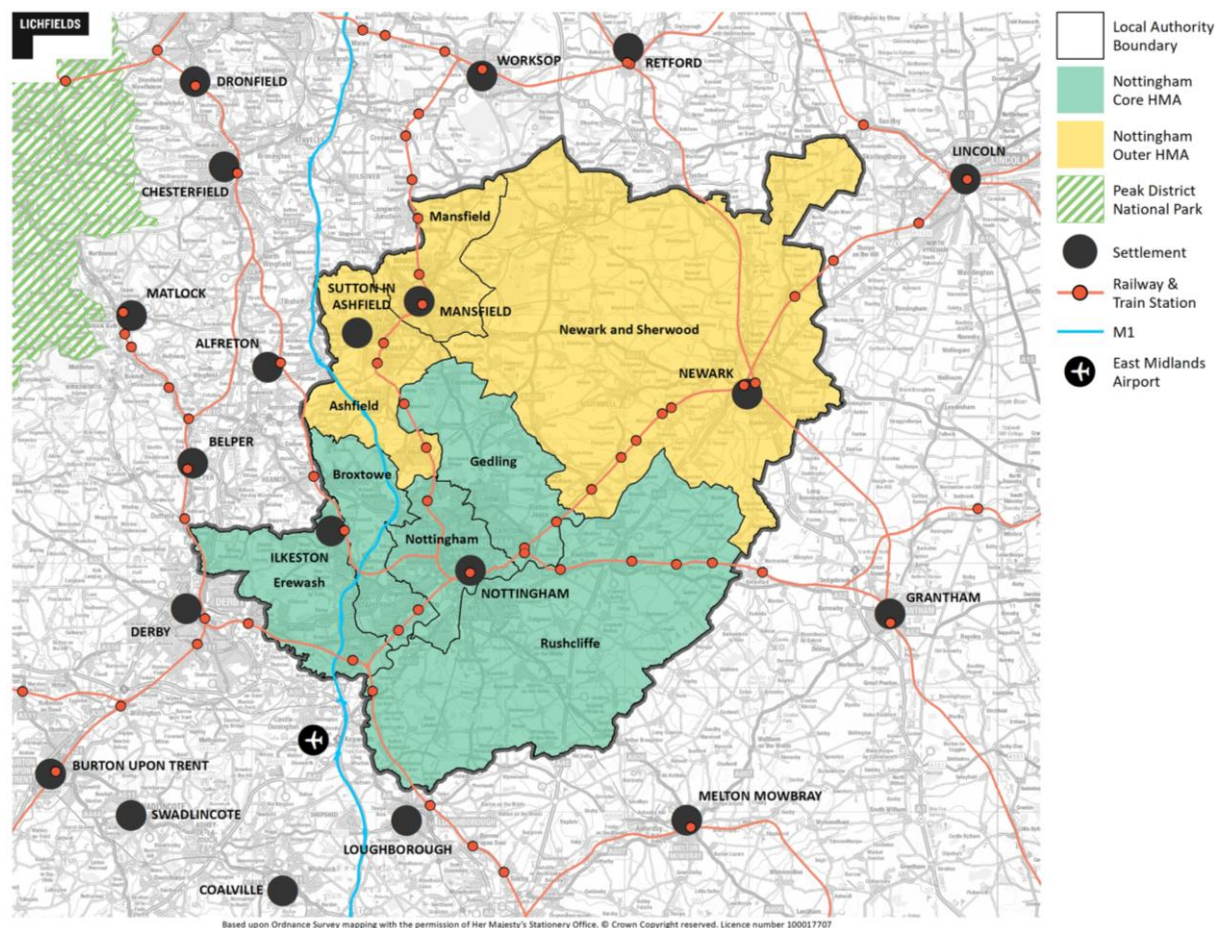
1.0 Introduction

- 1.1 In 2021 Lichfields was commissioned to undertake an Employment Land Needs Study [ELNS] covering the Nottingham Core Housing Market Area [HMA] and Nottingham Outer HMA. The purpose of this study was to assess the future economic development needs of the 8 authorities including Mansfield District up to 2038. The study informed the Nottingham Core HMA's review of the Aligned Core Strategies and preparation of new Part 1 Local Plans, as well as the Nottingham Outer HMAs Local Plan Reviews in due course. The study area is illustrated in Figure 1.1.
- 1.2 The overarching objective of the study was to provide the Commissioning Group with an up to date understanding of future requirements for employment land, at both the Functional Economic Market Area [FEMA] and constituent authority level, over the period 2018-2038 and provide recommendations about the quantity and quality of sites.
- 1.3 To this end, the study:
- 1 Provided an up-to-date and robust evidence base to inform options for employment growth (beyond total numbers) to underpin the land proposals in the Local Plan Reviews being undertaken by the 8 authorities;
 - 2 Set out the economic context which framed the ELNS including the dynamics of the commercial and industrial market;
 - 3 Assessed the requirement for specific sector-led economic growth relevant to the study area;
 - 4 Identified the future demand over the plan period 2018-2038, based on both past trends as well as economic and household projection forecasts within the context of the FEMAs and identifies where gaps exist in both quantitative and qualitative terms;
 - 5 Demonstrated linkages between the economic analysis and the emerging local housing need requirements and how it will be drawn together to inform the overall policy conclusions;
 - 6 Set out the December 2024 National Planning Policy Framework [NPPF24] and PPG; the Government's Industrial Strategy: Building a Britain fit for the future; as well as the D2N2 Local Enterprise Partnership's [LEP] Strategic Economic Plan Vision and other relevant strategies, including the Economic Recovery Report.
 - 7 Engaged with all relevant stakeholders including the D2N2, the Development Corporation, HS2, education providers, local business and business groups, the Chamber of Commerce developers, land promoters, and local property agents.
- 1.4 Since the report was published, the planning landscape has changed greatly, led by a new Labour Government and a substantially amended NPPF24 which has shifted the approach to be taken when planning for housing, commercial and industrial needs, including a new requirement to examine the needs of the 'modern economy'. New Planning Practice Guidance has also been issued.
- 1.5 The Council's Local Plan progress has also evolved, with Mansfield District Council's [MDC's] *Regulation 18 Mansfield District Local Plan Review Consultation (2025)* finishing on 13th July 2025. The timeline for the Local Plan specifies a Regulation 19 Local Plan

submission by Spring 2026, with a summer 2026 formal submission to the Planning Inspectorate.

- 1.6 In light of this new schedule, Lichfields has been asked by the Council to comprehensively update the 2021 ELNS from the perspective of Mansfield District to align with the requirements of the NPPF24 and accompanying PPG, as well as taking into account the recommendations of the Nottinghamshire Core & Outer HMA Logistics Study (August 2022). The focus is on the employment land needs of the District; the supply analysis has not been revisited as part of this ELN Update.
- 1.7 The Mansfield ELNA will therefore form a key part of the needs case underpinning the emerging Local Plan's strategic economic and employment policies over the emerging Plan period of 2023-2043.

Figure 1.1 Nottingham Core and Outer Sub-Regional Context



Source: Lichfields (2021): Nottingham Core HMA and Nottingham Outer HMA Employment Land Needs Study

Report Structure

- 1.8 This Mansfield ELNS Update is structured as follows:
- 2 **Background Policy Context:** setting out the latest national and local planning policy context along with the economic strategy for Mansfield.

- 3 **Socio-Economic Context:** examining macro and micro-economic trends and conditions.
- 4 **Commercial Property Market Signals and Intelligence.**
- 5 **Forecasting future economic growth needs and employment land requirements.**
- 6 **Analysing the Needs of the Modern Economy,** assessing the current prevalence of laboratories, gigafactories, data centres and digital infrastructure in Mansfield before analysing their growth potential.
- 7 **Demand / Supply Balance.**
- 8 **Conclusions and Recommendations,** bringing together and summarising the key findings and recommendations.

2.0 Background – Policy Context

Introduction

- 2.1 This section reviews the implications of the new December 2024 NPPF24 (as updated in February 2025) and the relevant updated sections of the PPG. It also provides commentary on the implications of Iceni’s 2022 Nottinghamshire Core & Outer HMA Logistics Study and other relevant policy / evidence base documents that have been produced since the 2021 ELNS was undertaken.

National Planning Policy Framework

- 2.2 The NPPF24 places a particular emphasis on sustainable development, including the provision of homes and employment land, through a process of:
- 1 Supporting strong, vibrant and healthy communities by ensuring that there is a sufficient number and range of homes to meet the needs of present and future generations;
 - 2 Fostering well-designed, beautiful and safe places that reflect current and future needs.
 - 3 Reviewing employment land allocations to ensure the supply meets identified needs;
 - 4 Proactively supporting sustainable economic development to help build a strong, responsive and competitive economy, by ensuring that sufficient land of the right types is available in the right places and at the right time to support growth, innovation and improved productivity; and by identifying and coordinating the provision of infrastructure; and,
 - 5 Encouraging the effective use of land by re-using land that has been previously developed (brownfield land), with a view to promoting regeneration.
- 2.3 It states that the purpose of the planning system is to contribute to the achievement of sustainable development, including the provision of homes, commercial development, and supporting infrastructure in a sustainable manner [§7].
- 2.4 Paragraph 11 of the NPPF24 retains the presumption in favour of sustainable development and refers to the expectation that plans should “*meet the development needs of their area*” and “*as a minimum provide for the objectively assessed needs for housing and other uses, as well as any needs that cannot be met within neighbouring areas, unless:*
- i *the application of policies in this Framework that protect areas or assets of particular importance provides a strong reason for restricting the overall scale, type or distribution of development in the plan area*7; or
 - ii *any adverse impacts of doing so would significantly and demonstrably outweigh the benefits, when assessed against the policies in this Framework taken as a whole*”.
- 2.5 Ultimately, the Council’s Local Plan will need up-to-date and comprehensive evidence to inform its judgements about the need for, and relative importance of employment land in its area, particularly in the face of continued pressure for release to other uses.

- 2.6 Section 6 of NPPF24 summarises how the planning system should help build a strong competitive economy:
- “Planning policies and decisions should help create the conditions in which businesses can invest, expand and adapt. 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.”* [§85]
- 2.7 The NPPF24 [§86] states that local planning authorities [LPAs] are required to ensure that Local Plan policies set out a clear economic vision and strategy which positively and proactively encourages sustainable economic growth, having regard to the national industrial strategy and any relevant Local Industrial Strategies [LIS] and other local policies for economic development and regeneration. They should set criteria, and identify strategic sites, for local and inward investment to match the strategy and to meet anticipated needs over the plan period, and seek to address potential barriers to investment, such as inadequate infrastructure, services or housing, or a poor environment. The NPPF24 also requires planning policies to be flexible enough to accommodate needs not anticipated in the plan and allow for new and flexible working practices and spaces to enable a rapid response to changes in economic circumstances.
- 2.8 The new NPPF24 expands paragraph 86 by including a new requirement for LPAs to *“pay particular regard to facilitating development to meet the needs of a modern economy, including by identifying suitable locations for uses such as laboratories, gigafactories, data centres, digital infrastructure, freight and logistics.”*
- 2.9 Paragraph 87, which requires planning policies and decisions to recognise and address the specific locational requirements of different sectors, is also expanded in the new NPPF24. Clause a) requires policies to make provision for *“clusters or networks of knowledge and data-driven, creative or high technology industries; and for new, expanded or upgraded facilities and infrastructure that are needed to support the growth of these industries (including data centres and grid connections)”*.
- 2.10 Paragraph 87b identifies a requirement to provide for storage and distribution operations at a variety of scales and in suitably accessible locations *“that allow for the efficient and reliable handling of goods, especially where this is needed to support the supply chain, transport innovation and decarbonisation”*.
- 2.11 Paragraph 87c sets out a new requirement to make provision for the *“expansion or modernisation of other industries of local, regional or national importance to support economic growth and resilience”*.

Planning Practice Guidance

- 2.12 On 6th March 2014 the Government launched the Planning Practice Guidance [PPG] web-based resource¹. This brought together many areas of English planning guidance into a new format linked to the NPPF24.
- 2.13 The PPG’s guidance on Economic Needs Assessments was last updated on 20th February 2019, with a high-level approach for assessing need for logistics space added later that year, on 22nd July. As such, it is unchanged from the version that the 2021 ELNS relied upon.

¹ <http://planningguidance.planningportal.gov.uk/>

Employment Land / Economic Policy

- 2.14 The methodology for undertaking economic needs assessments is not set out in the NPPF²⁴ but is instead left to the Housing and Economic Needs Assessment chapter of the PPG. The relevant section of the PPG addressing the calculation of objectively assessed employment land needs was updated on 20th February 2019 and 22nd July 2019.
- 2.15 It begins by setting out how strategic policy making authorities can prepare and maintain evidence about business needs. This would include liaising closely with the local business community, assessing:
- the best fit functional economic market area [FEMA];
 - the existing stock of land for employment uses within the area;
 - the recent pattern of employment land supply and loss - for example based on extant planning permissions and planning applications (or losses to permitted development);
 - evidence of market demand (including the locational and premises requirements of particular types of business) - sourced from local data and market intelligence, such as recent surveys of business needs, discussions with developers and property agents and engagement with business and economic forums;
 - wider market signals relating to economic growth, diversification and innovation; and
 - any evidence of market failure - such as physical or ownership constraints that prevent the employment site being used effectively².
- 2.16 In assessing future requirements for employment land, the PPG requires Plan-makers to consider:
- sectoral and employment forecasts and projections which take account of likely changes in skills needed (labour demand);
 - demographically derived assessments of current and future local labour supply (labour supply techniques);
 - analysis based on the past take-up of employment land and property and/or future property market requirements; and,
 - consultation with relevant organisations, studies of business trends, an understanding of innovative and changing business models; and monitoring of business, economic and employment statistics³.
- 2.17 The PPG also requires LPAs to take account of longer-term economic cycles in assessing this data, and to consider and plan for the implications of alternative economic scenarios.
- 2.18 It notes that the available stock of land can be compared with the particular requirements of the area so that 'gaps' and any over-supply in local employment land provision can be identified:

"It is important to consider recent employment land take-up and projections (based on past trends) and forecasts (based on future scenarios), and to identify instances where

² 2a-026-20190220

³ 2a-027-20190220

sites have been developed or sought for specialist economic uses. This will help to provide an understanding of the underlying requirements for office, general business and distribution space, and (when compared with the overall stock of employment sites) can form the context for appraising individual sites.⁴

2.19 The approach that would need to be undertaken to define the Council's employment land requirements would need to follow that set out in the PPG below⁵:

"When translating employment and output forecasts into land requirements, there are 4 key relationships which need to be quantified. This information can be used to inform the assessment of land requirements. The 4 key relationships are:

- Standard Industrial Classification sectors to use classes;*
- Standard Industrial Classification sectors to type of property;*
- employment to floorspace (employment density); and*
- floorspace to site area (plot ratio based on industry proxies).*

2.20 This is appropriate as the forecasting of employment land should be based on a number of reasonable scenarios that (in the words of the current PPG) are based on *"a range of data which is current and robust"*.

2.21 The PPG has also added in two sections on how authorities can assess need and allocate space for logistics⁶ and how specific locational requirements of specialist or new sectors can be addressed⁷.

2.22 Regarding logistics, the PPG states that where a need for such facilities may exist, strategic policy-making authorities should collaborate with other authorities, infrastructure providers and other interests to identify the scale of need across the relevant market areas. This can be informed by:

- "Engagement with logistics developers and occupiers to understand the changing nature of requirements in terms of the type, size and location of facilities, including the impact of new and emerging technologies;*
- analysis of market signals, including trends in take up and the availability of logistics land and floorspace across the relevant market geographies;*
- analysis of economic forecasts to identify potential changes in demand and anticipated growth in sectors likely to occupy logistics facilities, or which require support from the sector; and*
- engagement with Local Enterprise Partnerships and review of their plans and strategies, including economic priorities within Local Industrial Strategies."*

2.23 Authorities will also need to assess the extent to which land and policy support is required for other forms of logistics requirements, including the needs of SMEs and of 'last mile' facilities serving local markets. It states that a range of up-to-date evidence may have to be considered in establishing the appropriate amount, type and location of provision,

⁴ 2a-02920190220

⁵ 2a-030-20190220

⁶ 2a-031-20190722

⁷ 2a-032-20190722

including market signals, anticipated changes in the local population and the housing stock as well as the local business base and infrastructure availability.

- 2.24 Finally, the PPG states that when assessing what land and policy support may be needed for different employment uses, it will be important to understand whether there are specific requirements in the local market which affect the types of land or premises needed. It notes that:

“Clustering of certain industries (such as some high tech, engineering, digital, creative and logistics activities) can play an important role in supporting collaboration, innovation, productivity, and sustainability, as well as in driving the economic prospects of the areas in which they locate. Strategic policy-making authorities will need to develop a clear understanding of such needs and how they might be addressed taking account of relevant evidence and policy within Local Industrial Strategies. For example, this might include the need for greater studio capacity, co-working spaces or research facilities.

These needs are often more qualitative in nature and will have to be informed by engagement with businesses and occupiers within relevant sectors.”

The UK’s Modern Industrial Strategy

- 2.25 The UK Government released its Modern Industrial Strategy in June 2025⁸. This sets out the Government’s vision for unlocking economic growth. This is underpinned by:

- a long-term and stable outlook
- a renewed commitment to free and fair trade
- measures to ease the investor journey
- a strategic growth-focused state

- 2.26 As part of its mission for growth, the Industrial Strategy identifies eight growth driving sectors [IS-8] comprised of: advanced manufacturing, creative industries, clean energy, defence, digital technologies, financial services, life sciences, and professional business services.

- 2.27 The Industrial Strategy identifies several barriers to investment that it will seek to overcome as part of the growth mission and through the lens of promoting investment. This includes:

- Enhancing skills and increasing access to talent;
- Improving energy and infrastructure by tackling high electricity costs and investing in clean energy;
- Reduce regulatory barriers (including planning reform);
- Increase trade and support inward investment through proactive bringing forward more investible sites as part of Industrial Strategy Zones (which includes Investment Zones and Freeports); and
- Strengthen local business environment including funding, taxation and investment.

⁸ https://assets.publishing.service.gov.uk/media/68595e56db8e139f95652dc6/industrial_strategy_policy_paper.pdf

- 2.28 A core objective of the Industrial Strategy is to take a place-based approach which focusses on places with the greatest potential for growth sectors. Recognising where city regions, high-potential clusters, and strategic industrial sites exist.
- 2.29 Within the Strategy is a recognition that the East Midlands contains several IS-8 clusters including an Advanced Manufacturing cluster.
- 2.30 Whilst logistics is not named as an IS-8, it is recognised that enhancing access to transport and logistics will improve supply chain capabilities, resilience and improve the business environment for those operating within the IS-8.
- 2.31 In the next stage of development of the Industrial Strategy, the Government will prioritise sub-sectors within these broad sectors that meet their objectives and where there is evidence that policy can address barriers to growth. Targeted Sector Plans will be designed in partnership with business, devolved governments and regions, and other stakeholders.

Local and Sub-Regional Evidence Base

Irresistible to Investment: A Vision for Growth (2025)

- 2.32 In 2025, the East Midlands Combined County Authority [EMCCA] released its Vision for Growth setting out the region's plan for delivering economic transformation and long-term objectives.⁹ This set out a plan to create 100,000 new jobs, deliver 52,000 new homes, and add £4 billion to the region's economy.
- 2.33 To achieve this, the Vision for Growth looks to capitalise upon unique strengths such as three Investment Zone sites, the UK's only inland Freeport, former power station sites, and the Strategic Road Network including the M1.
- 2.34 There are seven growth strategies listed within the region's Growth Strategy Areas. This includes 'the Heartlands' which covers places such as Mansfield and Ashfield. Given the disparate size and nature of settlements in this area, it recognises that a one-size-fits-all strategy would not work and will instead undertake a 'Heartlands Process' that engages with communities and focusses on specific places.
- 2.35 Nevertheless, at this stage, the Vision for Growth recognises that there are key economic assets in the area including the Automated Distribution and Manufacturing Centre in Mansfield. As part of this, the Vision for Growth also lists a number of interventions which could help the area achieve growth including faster broadband, enhanced public transport, local business support, and better social infrastructure.
- 2.36 The Vision also sets out key outcomes that it intends to achieve, this includes:
- Support and unlock the region's clean energy innovation potential by leveraging existing infrastructure and expertise, drawing upon the region's history of energy production; and,
 - Drive growth in industry by supporting world-leading manufacturers, as well as smaller businesses, by supercharging skills, secure investment in key sites (including the

⁹ East Midlands Combined County Authority (2025): Vision for Growth

Freeport and Investment Zones) and create more opportunities in areas such as MedTech, professional, and financial services.

Mansfield District Local Plan 2013-2033 (2020)

2.37

In September 2020, Mansfield District Council adopted its Mansfield District Local Plan 2013-2033¹⁰. The Local Plan replaced all the remaining saved policies of the 1998 Mansfield District Local Plan and now forms part of the statutory development plan. The relevant policies relating to employment are set out below:

- **Policy S2 The Spatial Strategy** sets out the spatial strategy for the district including the settlement hierarchy approach to employment growth and the amount of employment land which will be provided (at least 41 ha between 2013 to 2033).
- **Policy E1 (Enabling economic development)** states that proposals for economic development will be supported, especially when they involve:
 - Major inward investment into the District;
 - The creation of substantial new employment, particularly with skilled jobs; and,
 - A contribution to the achievement of wider regeneration initiatives.

The Policy also states that major proposals are expected to be located on sites allocated as new employment areas or undeveloped land or vacant buildings within existing key or general employment areas but may also be appropriate on other sites subject to the provisions of Policy E4. The Policy also states that smaller proposals, including premises designed for business start-ups, will be supported in closer proximity to residential areas and as part of mixed-use schemes, subject to meeting policies relating to local amenity, pollution and land instability;

- **Policy E2 (Sites allocated as new employment areas)** outlines sites that are allocated as new employment areas;
- **Policy E3 (Retaining land for employment uses)** outlines that development proposals within the existing key or general employment areas and allocated employment areas will be supported if they fall within Use Class B1¹¹, B2 or B8. The Policy also states that alternative uses will be supported within these areas provided they meet certain criteria; and,
- **Policy E4 (Other industrial and business development)** supports employment development outside of existing key / general employment areas and allocated employment sites subject to meeting certain criteria.
- **Policy SUE1** allocates land at Pleasley Hill Farm as a strategic sustainable urban extension including the delivery of a minimum of 1.7ha (developable area) of mixed employment uses;
- **Policy SUE2** allocates land off Jubilee Way as a strategic sustainable urban extension including the delivery of a minimum of 1.6ha (developable area) extension to Crown Farm Way Industrial Estate;

¹⁰ Mansfield District Council (2020): *MDC Adopted Local Plan 2013-2033*

¹¹ On 1 September 2020, the Use Classes Order 1987 was significantly amended by Government. The former B1a, B1b and B1c use classes now fall under Class E(g).

- **Policy SUE3** identifies land at Berry Hill as a committed strategic urban extension including the delivery of a minimum of 18.8ha (developable area) of mixed employment uses.

2.38 The supporting text to Policy E2 states that the employment land supply will be met from a variety of sources including completions, extant planning permissions, vacant plots within protected key and general employment areas and new employment allocations. Table 6.3 of the Plan (reproduced as Table 2.1 below) sets out the contribution from various sources.

Table 2.1 Employment Land Provision

Plan Period Employment Land Target ha	Employment Land (ha)
Target	41*
Total amount of floorspace /employment land developed between 1/4/13 and 1/4/18	2.82
Loss of employment land 2013/2019	-0.98
Sites with planning permission at 31 March 2019	23.83
Land available on key and general employment areas	8.95
Local Plan allocations	17.95
TOTAL	52.57

Source: Mansfield District Local Plan 2020

* 38ha of B1c/B2 and B8 land and 3ha of employment land for B1a office space

2.39 The policies outlined above were informed by technical evidence provided in the Mansfield Employment Land Review [ELR] 2017 and Employment Land Technical Paper [ELT] 2018.

Regulation 18 Mansfield District Local Plan Review Consultation (2025)

2.40 Between 30th May and 17th July 2025, MDC consulted on its Regulation 18 draft Local Plan Review. Included in the consultation were revisions to a number of policies and a long list of potential sites which could come forward for new development. MDC will now use the feedback received, along with further assessments of all sites, to update the plan and to determine which sites should be included in its subsequent Regulation 19 Publication Draft Local Plan.

2.41 The Local Plan Review states that it will be a key tool for delivering the long-term regeneration of the Mansfield and Market Warsop urban areas including enhancement of the town and district centres with new shopping, leisure, housing and economic development, and improvements to the area's physical and social infrastructure.

2.42 Part of the Vision for Mansfield in 2043 is for businesses to have expanded and diversified using the connections with further education to become innovative, with value added jobs which are suited to the changed economy of the District. A broad range of employment sites and supporting infrastructure will have been delivered, including local incubation and starter units that will have enabled local businesses to grow.

2.43 The Local Plan Review has an important role to play in promoting economic growth by:

- attracting investment into the district by allocating a range of employment sites for development in different locations;
- protecting existing employment areas where appropriate; and
- ensuring that local businesses have the opportunity to expand and modernise.

2.44 Objective 1 of the Local Plan Review is to:

“Support economic growth and prosperity by promoting the regeneration of previously developed land and existing buildings, as well as identifying other sustainable areas, for job growth, services and new homes. In doing so, direct most development to the Mansfield urban area, including Mansfield Woodhouse, Forest Town and Rainworth, followed by Market Warsop, whilst seeking to mitigate against any significant adverse social, environmental and infrastructure impacts of development.”

2.45 Objective 2 aims to:

“Contribute to creating a stronger, more resilient local economy by bringing forward a diverse range of employment sites to reflect the changing economy and ensuring that residential areas are accessible to employment, education and training opportunities.”

2.46 *Policy S2: The Spatial Strategy* aims to enable housing, commercial and retail development during the period 2023 to 2043, including:

“b. Employment: safeguard important existing employment areas, identify sites to meet future economic development needs for employment land for at least xx ha of employment land between 2023 to 2043.”

2.47 The supporting text to this Policy states that the future employment land requirements of the District will be based on the findings of the update to the Nottingham Core HMA and Nottingham Outer HMA Employment Land Needs Study 2021. The evidence base will not split the employment land requirements between the Mansfield urban area and Warsop Parish and will set an employment land requirement for the whole District. Policy E2 will allocate future employment sites across the whole District, although it is anticipated that the majority of employment space requirements will be allocated within the Mansfield urban area as this is the most sustainable location.

2.48 It goes on to note that in relation to employment growth, consultation responses¹² generally favoured the provision of growth over the identified need for flexibility:

“Also mentioned was the need to carefully consider the link between employment and housing, as an increase in jobs can generate a requirement for additional housing. Some consultees stated that this should be as high as possible to ensure economic and housing delivery to regenerate the district, however it was also raised that this approach could increase unemployment and cause environmental harm if additional housing is provided but the jobs do not emerge. An oversupply of employment uses could also have consequences on the market. Due to the significantly higher housing target, it is unlikely that we would increase this further, although this will be confirmed by new and updated evidence.” [page 26]

2.49 Section 6 address Employment issues and seeks to develop a strong and thriving economy, improving employment opportunities for all skills and diversifying the economy. The Local Plan Review aims to assist with the creation of new jobs through:

- *“the allocation of land for employment uses that are accessible to proposed residential areas;*

¹² From an earlier Regulation 18 Issues and Opportunities Consultation MDC undertook in 2023, and not the 2025 Regulation 18 Mansfield District Local Plan Review Consultation

- *the protection of key and general employment areas and the promotion of vacant plots within these sites for economic development;*
- *supporting sustainable new economic development outside of these areas;*
- *promoting town centre regeneration;*
- *encouraging employers to recruit locally and invest in training schemes to upskill their work force;*
- *supporting wider service sector jobs, especially education and health;*
- *ensuring the district, its workforce and physical environment is attractive to new and existing local businesses wishing to diversify and expand; and,*
- *facilitating improvements to transport and telecommunications including broadband” [paragraph 6.7].*

2.50 It goes on to state that:

“It is important that the council can meet its employment land requirements to support economic growth and housing delivery over the plan period to 2043. To allow for the employment land requirements to be delivered, approximately xx hectares (ha) of employment land will be allocated within Policy E2. This will allow for flexibility if some employment sites take longer to come forward than expected. It will also allow for the fact that a number of sites within the key and general employment areas are not actively being promoted through the Housing and Economic Land Availability Assessment (HELAA) 2025.” [paragraph 6.11]

2.51 *Policy E1: Enabling Economic Development*, states that:

1. Proposals for economic development will be supported, especially when they involve:

- a. major inward investment into the district;*
- b. the creation of substantial new employment, particularly with skilled jobs; and*
- c. a contribution to the achievement of wider regeneration initiatives.*

2. Major proposals are expected to be located on sites allocated as new employment areas or on undeveloped land or vacant buildings within existing key or general employment areas but may also be appropriate on other sites subject to the provisions of Policy E4.

3. Smaller proposals, including premises designed for business start-ups, will be supported in closer proximity to residential areas and as part of mixed use schemes, subject to meeting policies P7 and NE3.

2.52 The supporting text to this Policy also states that the Local Plan Review will also consider the employment needs that will help facilitate a modern economy as set out in the NPPF24 (paragraph 86). The new employment opportunities will not only provide a range of prospects for the growing population, but also for existing residents.

2.53 Policy E2 allocates a number of new employment areas including a 3.45 ha extension to Ratcher Hill Quarry employment area [Site E2a]; a 2.2 ha site at Oakfield Lane, Market Warsop [Site E2b]; and the 9 ha Penniment Farm [Site E2c]. Policy E2 therefore provides a supply of land to deliver approximately 20ha. This is intended to provide choice and

flexibility to the market. More details on establishing the employment land requirements will be set out within an Employment Technical Paper.

2.54 Policy E3 aims to retain land for employment uses and identifies 22 existing key or general employment sites in the District where development proposals will be supported provided that the proposal falls within Use Class B2, B8 or E(g).

2.55 Policy E4 Other industrial and business development states that:

2 *“Development proposals within Use Classes B2, B8, E(g)(ii) and E(g)(iii) that are outside areas identified within Policies E2 and E3 will be supported where:*

a. the site lies within or on the edge of the Mansfield or Market Warsop urban areas or settlement boundaries;

b. the proposal is for the expansion of an existing business;

c. it would provide high quality employment floor space for an identified end user; or

d. it is for the redevelopment of established industrial or business land or premises.”

The Nottingham Core and Outer HMA Employment Land Needs Study (2021)

2.56 Lichfields carried out the Nottingham Core HMA and Outer HMA Employment Land Needs Study 2021 [ELNS] for the period 2018 to 2038 to inform the Nottingham Core HMA’s review of the Aligned Core Strategies and preparation of new Part 1 Local Plans, as well as the Nottingham Outer HMAs Local Plan Reviews. It provided the eight constituent Councils with an understanding of the economic picture of the area and the implications of employment growth on workforce and employment land requirements.

Supply

2.57 This study undertook 133 employment land site assessments of allocated or, in a few instances, potential employment sites, amounting to a very substantial 2,925.37 ha of land (gross) across the whole study area, of which 16 sites (totalling 21.71 ha net) were located in Mansfield District. It considered the spatial characteristics and quality of the existing and allocated sites across the 8 authorities and their suitability to meet future office, industrial and distribution development needs and their likely deliverability. All 16 of Mansfield’s sites were recommended either for retention/protection or allocation going forward.

Qualitative Market Overview

2.58 Based on consultations with agents, local businesses and stakeholders, the following qualitative issues were identified:

- The **rapidly rising demand for distribution floorspace**, the need for an increased supply of Class A office space (particularly within Nottingham City) and the opportunities for smaller urban centres as working patterns evolve and capacity becomes squeezed within the more traditional town centre office markets. The rapid shifts in the demand for distribution floorspace has essentially been an expedited continuation of past trends, although it has been accelerated by the essential requirements of the pandemic and associated national lockdowns.

- Agents stressed the scale of demand that existed within the market from a range of potential occupiers, from national scale to final mile distribution facilities. **The M1 corridor along the western arc of Nottingham was identified as the primary area of demand**, with distribution floorspace located around any junction from J28 in Ashfield running south to J24, highlighted as a key market ask from potential occupiers. To illustrate the scale of latent demand, one agent predicted that a further two developments on the scale of the East Midlands Gateway located at any major M1 junction within Greater Nottinghamshire may not be enough to satiate demand over the next decade. Demand for distribution floorspace along the A1 corridor is more subdued, although demand still exists here for smaller final-mile distribution units of which there remains a lack of supply.
- Property agents highlighted that whilst the nature of this demand has certainly been accelerated by recent market conditions, **opportunities have been missed within Greater Nottingham due to a lack of available employment sites over at least the past decade**. In this regard it was considered that projecting forward past trends would not adequately capture the need for sites that presently exists within the market.
- The preferred approach from both developers and occupiers is to **expand industrial parks at key transport intersections** wherever possible to avoid overloading the road network in urban locations and to allow for business expansion without locating away from existing workforces.
- Locations such as **business parks closer to urban areas with good access to the M1 were identified as secondary potential locations for development**, as skills availability becomes an increasingly important factor for occupiers due to the rapidly changing labour requirements within the industry.
- In terms of office floorspace requirements, discussions focussed particularly around the **lack of Grade A office space in Nottingham City**. Despite uncertainty over homeworking and the impact of Covid-19, agents suggested that the market was likely to recover strongly and that expanding businesses are being forced to look for office space in out-of-centre locations due to the lack of space in the City, which remains the most-in demand location.
- At the same time, there is **increasing demand for smaller, modern and more flexible office space** that can accommodate 30-50 employees from businesses in innovative sectors such as biotech and software. Agents reported increasing numbers of enquiries from hi-tech businesses looking to relocate from London and the South East due to rising rents and narrowing labour supply, presenting a real opportunity if adequate supply can be made available. This trend was manifesting itself in the conversion of older and larger office units into smaller modernised and flexible spaces for collaborative working. Alongside this, units for innovative businesses in enterprise parks and innovation hubs continue to be in high demand across the two HMAs.
- The business survey indicated that around **a quarter of respondents expected to increase levels of remote working and explore greater flexibility in working patterns for their staff over the long term**, with just under half expecting to move premises in the next 5 years. This would increase the demand for good quality, office space on flexible terms near to town centres in the outer districts as offices play an

increased role as gathering points rather than being needed for the whole workforce 5 days a week. In this sense, demand for smaller and more flexible units close to transport links and town centre amenities may increase across Greater Nottingham.

Employment Land Requirements

- 2.59 Moving onto future employment land requirements, the ELNS identified various scenarios for deriving employment land requirements based on the PPG, based on:
- 1 Baseline employment forecasts (**labour demand**), using Experian's Local Market Quarterly Forecasts for September 2020 (compared to the pre-Covid 19 March 2020 projection). This factored in Experian's latest assumptions regarding the negative economic impacts of the Pandemic and Brexit; it did not anticipate a third lockdown. This represented the starting point for assessing future business needs, but it is likely to be a pessimistic model. The baseline Experian March 2020 scenario mirrored Scenario 1, albeit it was undertaken before the full economic shock of the Covid-19 pandemic was fully realised. As a result, and for every district, the economic growth projections are significantly more optimistic, with a knock-on effect for the land requirements.
 - 2 Trending-forward **past jobs growth** experienced in the districts over the long term, from 1997-2018;
 - 3 **Regeneration-led** econometric model, which factors in the priority sectors targeted in the D2N2's "Spark in the UK's Growth Engine Strategic Economic Plan - 2019-2030". This refers to 11 priority sectors important to the D2N2 economy for different reasons and which require different interventions in order to effectively contribute to productivity growth. This resulted in a significant uplift over and above the baseline position. This scenario provided a theoretical assessment of potential future economic growth and does not take account of potential market demand or delivery factors. The ELNS stated that this scenario should be regarded as a yardstick of future economic potential in line with the LEP's policy aspirations rather than a prescriptive requirement for planning purposes.
 - 4 Estimated growth in the local **labour supply** and the jobs and employment space that this could be expected to support. This was based upon the Government's standard methodology for calculating housing need; and,
 - 5 Consideration of **past trends in completions** of employment space based on monitoring data collected by the Councils, and how these trends might change in the future. It was based on more robust and comprehensive data than was available at the time of the 2015 ELFS (hence greater weight could be attached as a consequence).
- 2.60 The ELNS noted that the ultimate judgement regarding the level of employment need that the 8 districts should plan for should not simply be shaped by a consideration of quantitative analysis. A range of qualitative factors should be taken into account, that would typically consider the quality and demand for existing premises, the spatial distribution of supply and demand for premises, and insights from commercial property agents and local businesses.
- 2.61 Mansfield District's net employment land needs (incorporating a 2-year flexibility factor) ranged from 8,555 sqm of office floorspace and 5.25 ha of industrial / warehousing land under the 2014-based SNPP labour supply scenario, up to 13,638 sqm office and 11.36 ha of

industrial land for the Regeneration scenario. The past take up rates for Mansfield suggested a much lower office need, of -17,865 sqm net, and a higher industrial land requirement of 12.62 ha).

- 2.62 The gross requirements increase the range to between 11,183 sqm and 42,686 sqm for office floorspace, and to between 18.94 ha and 26.31 ha for industrial land to 2038.

Table 2.2 Gross Floorspace Requirements for Mansfield District (including flexibility factor and losses) for 2018 to 2038

Scenario		Offices / R&D (sqm)	Light Industrial (ha)	General Industrial (ha)	Warehousing (ha)	Total Industrial (ha)
1) Experian September 2020 Baseline	Net	8,915	10.15	-2.95	0.11	7.30
	+ Flexibility Factor	11,206	10.64	-2.82	0.64	8.45
	+ Loss Replacement	40,254	15.53	-0.56	7.17	22.14
2) Experian March 2020 Baseline	Net	8,343	11.60	-2.16	1.53	10.97
	+ Flexibility Factor	10,634	12.09	-2.03	2.06	12.12
	+ Loss Replacement	39,682	16.98	0.23	8.60	25.80
3) Regeneration Scenario	Net	11,348	10.15	-2.95	3.02	10.21
	+ Flexibility Factor	13,638	10.64	-2.82	3.55	11.36
	+ Loss Replacement	42,686	15.53	-0.56	10.08	25.04
4) 2014-based SNPP	Net	6,264	8.49	-3.58	-0.81	4.11
	+ Flexibility Factor	8,555	8.98	-3.45	-0.28	5.25
	+ Loss Replacement	37,603	13.87	-1.19	6.26	18.94
5) Current SM (275 dpa)	Net	7,216	9.09	-3.35	-0.50	5.23
	+ Flexibility Factor	9,506	9.58	-3.23	0.03	6.38
	+ Loss Replacement	38,554	14.47	-0.97	6.56	20.07
6) Past Take Up Rates	Net	-20,155	4.91	1.28	5.29	11.47
	+ Flexibility Factor	-17,865	5.40	1.41	5.82	12.62
	+ Loss Replacement	11,183	10.29	3.67	12.35	26.31

Source: Lichfields' analysis. Rounding errors may mean sums do not add.

- 2.63 Regarding the need for strategic distribution space, the ELNS notes that as a relatively recent phenomenon, the needs of strategic (large scale) B8 Distribution uses are not easily revealed via the methodology recommended for forecasting employment land needs by the Government in the PPG.

"This is an issue for the 8 Nottingham Core/Outer HMA authorities, as with one or two notable exceptions, there has been a lack of strategic big box' B8 allocations that have come forward in recent years in the sub-region. As referenced in Section 5, commercial agents and logistics developers/operators have criticised the lack of large 'big box' B8 allocations that have come forward in recent years across the Greater Nottingham sub-region. According to agents, the availability of Grade A supply in the study area is at a record low, with vacancy rates very low throughout the sub-region and typically short void periods." [paragraph 9.18]

- 2.64 Given the scale and urgency of this issue, the ELNS recommended that the District Councils (potentially working with adjoining districts along the M1 Corridor) may wish to consider commissioning a further strategic study to quantify the scale of strategic B8 logistics need across the Core/Outer HMA and beyond that builds on the indicative suggestions set out above. This future study should seek to quantify the scale of strategic B8 requirements and potentially identify sites where this need should be allocated. Lichfields view was that the main focus of this future study should be along the M1 Corridor and A-roads near to the Motorway junctions.

Supply / Demand Balance

- 2.65 Based on data contained within the adopted Mansfield Local Plan, the ELNS reported that as of 1st April 2019, the District had a forward supply of 50.73 ha of employment land (excluding the 2.82 ha already developed over the plan period to date). This was an increase of 15.53 ha on the supply position on 31st March 2018 due to the inclusion of five large Local Plan allocations in the intervening period.

Table 2.3 Employment Land Provision in Mansfield District

Plan Period Employment Land Target ha 2013-2020	2019 Local Plan Employment Land (ha) Position	2018 AMR Employment Land (ha) Position
Local Plan Target	41*	n/a
Total amount of floorspace /employment land developed between 1/4/13 and 1/4/19	2.82	2.38
Loss of employment land 2013/2019	-0.98	-0.94
Sites with planning permission	23.83	24.65
Local Plan allocations	17.95	n/a
<i>Pleasley Hill Farm - SUE 1</i>	1.76	-
<i>Land off Jubilee Way - SUE 2</i>	1.6	-
<i>Ratcher Hill Quarry Employment Area - E2a</i>	3.45	-
<i>Oakfield Lane, Market Warsop - E2b</i>	2.2	-
<i>Penniment Farm - E2c</i>	9	-
Sites Available on Key and General Employment Areas	8.95	10.55
TOTAL Available as of 31st March 2019	50.73 ha	35.2 ha

Source: Mansfield District Local Plan 2020 / MDC Employment Monitoring Reports

*38ha of B1c/B2 and B8 land and 3ha of employment land for B1a office space

- 2.66 The ELNS compared estimated demand for employment space against all currently identified supply in Mansfield District, with the findings reproduced in Table 2.4. Against a total supply of 35.2 ha (benchmarked to 2018 for consistency), the indicative gross requirements were generally lower, even when office floorspace was converted to land through the application of a 40% plot ratio. Under the most optimistic Regeneration scenario, this equated to around 36 ha, which was a close fit with the 2018 supply position, although well below the higher 2020 position of 50.73 ha.

Table 2.4 Demand/Supply Balance of Employment Space 2018-2038 for Mansfield District

	Office / Industrial Supply as of 31 st March 2018	Need for Offices 2018-38 (sqm)		Need for Industrial / Distribution 2018-38 (ha)	
		Experian/Labour Supply Range	Past Take Up Scenario	Experian / Labour Supply Range	Past Take Up Scenario
Net	35.2 ha	8,555 – 13,638	-17,865	5.25 – 12.12	12.62
Gross		37,603 -42,686	11,183	18.94 – 25.80	26.31

Source: Lichfields' analysis / MDC

- 2.67 All of the sites that Lichfields appraised as part of the study were existing allocations or otherwise committed employment sites included in Table 2.4.
- 2.68 The ELNS concluded that if no new sites were forthcoming, this would indicate that to bring the supply back into balance (as of 2020), the Council may wish to consider providing a higher level of loss replacement, release some more employment sites from the portfolio, or import some of the need from adjoining districts which have lower levels of supply.

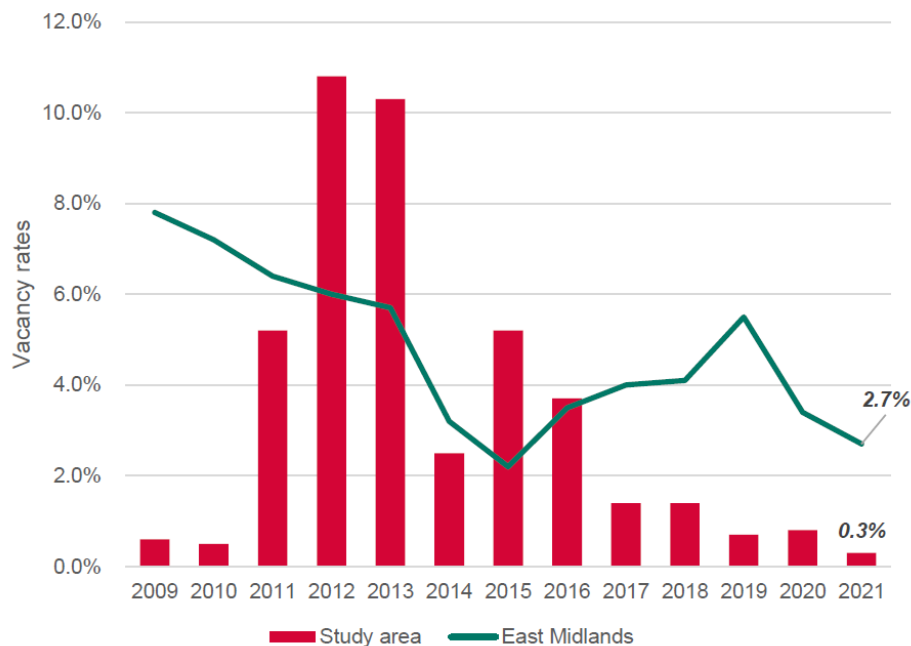
Conclusions and Policy Recommendations

- 2.69 The key demand/supply messages for Mansfield District were as follows:
- *“Against a total supply of c.35 ha in 2018 (rising to 51 ha in 2020), the indicative gross requirements are generally lower, even if office floorspace is converted to land through the application of a 40% plot ratio. However, under the most optimistic scenario (the Regeneration Scenario 3), this equates to around 36 ha, equal to the 2018 supply position (although it is well below the 2020 position). To bring this (current position) back into balance, the Council may wish to consider factoring in a higher level of loss replacement; or release some more employment sites from the portfolio; or import some of the need from adjoining districts which have lower levels of supply.”*

Nottinghamshire Core & Outer HMA Logistics Study (August 2022)

- 2.70 This study was commissioned by Nottinghamshire County Council on behalf of the same eight authorities comprising the Nottinghamshire Core and Outer Housing Market Area [HMA] including Mansfield. The purpose of this study was to understand the future demand for strategic warehousing and logistics facilities within the Study Area. This was to include forecasting future need, demand and growth in the strategic distribution/ logistics sector in the Study Area to 2040, as well as recommending a sound approach to sustainably plan for and manage logistics growth over the period to 2040.
- 2.71 The commercial market analysis noted that Nottinghamshire was one of the smaller industrial markets in the East Midlands by size of industrial inventory, with around 68 million sqft of stock overall (all unit sizes), but it has been growing rapidly in the last couple of years, with increased occupier demand and an increase in construction activity, particularly in distribution and logistics. The report noted that the Nottinghamshire market was home to numerous major occupiers from a range of sectors, with online giants Amazon occupying over 1.5 million sqft, locally based retailer Wilko in 1.3 million sqft and the likes of B&Q, Rolls Royce, Eddie Stobart and DHL also occupying large industrial spaces in Nottinghamshire (including Bassetlaw) [paragraphs 3.12 and 3.13].
- 2.72 The report noted that over the last 3 years, the study area had acquired c.2 million sqft of strategic warehousing floorspace, reaching 6.9m sqft in total. Whilst impressive, when indexed against the East Midlands’ performance over the last decade, the study area had actually grown its strategic warehousing stock at a similar proportion albeit from a smaller base. Vacancy rates of logistics units over 100,000 sq.ft in the study area were extremely low, at just 0.3%. Icení stated that this indicates a complete undersupply / failure of the market, with 5% considered the minimum for a functional market that allows for churn, choice and move ins. Since 2014 vacancy has been below this rate and since 2017 there had been essentially no space for large unit move-ins after pre lets.

Figure 2.1 Vacancy Rates for Logistics space over 100,000 sq.ft



Source: Icenl (2022): Nottinghamshire Core & Outer HMA Logistics Study, Table 3.8

- 2.73 The report noted that the ten-year average net absorption in the study area for large scale B8 units was 215,500 sqft or 19,400 sqm. For all large industrial units this rose to 290,000 sqft or 26,100 sqm. Most strategic warehousing projects were located along the M1 and in the outskirts of Nottingham, with two large schemes in Mansfield. The stakeholder consultation suggested that Green Belt land supply restriction in the M1 J25-27 area had thwarted delivery, putting pressure on other locations and forcing occupiers to accept less accessible locations. Junctions north of M1 J24 running to J28 are prime locations within the East Midlands in terms of location, accessibility and access to labour markets.
- 2.74 The report suggested that there was a difference between sites on the M1 and wider Nottinghamshire area, with the M1 prime territory for largest units. M1 spine and surrounds are primary target areas, 5km of a junction can be an occupier requirement (or trunk road). The A46 corridor did not have the same status particularly as it was not duelled yet, although some occupiers would consider this for deliverability potential. Manufacturers tend to be less focused on M1 connectivity and prefer labour proximity.
- 2.75 In terms of future supply in the study area, there were around to 215,000 sqm of unimplemented permissions across the study area and another 101,000 sqm of allocations therefore totalling **c.315,000 sqm of committed supply**. In addition, there was a future potential pipeline of a further 570,000 sqm including submitted applications and proposed allocations that could, without prejudice, increase the supply to a total 885,000 sqm [paragraph 5.5]. However, of this, **Mansfield only contributed 13,200 sqm** in its future pipeline, relating to Penniment Farm Unit 1.
- 2.76 To forecast future need for strategic logistics sites over the study area, the report analysed a range of scenarios including labour demand, replacement build, net absorption and growth rates. Table 2.5 summarises the outcomes of the models for future large scale logistics

requirements. This takes into account a margin of 5 years' historic completions.

Table 2.5 Range of modelled large scale logistics unit needs (sqm)

	Study Area 2021-40	Need with Margin
Labour demand	-51,000	135,000
Completions Annualised	707,000	893,000
2012-21 Net absorption (+ compensation)	554,500	731,400
2017-21 Net absorption (+ compensation)	927,300	1,113,300
TGRD Low	574,000	760,000
TGRD Central	744,000	930,000
TGRD High	1,084,000	1,270,000
Share of M1 J24-28	1,600,000	1,786,000
Increased delivery relative to Notts / L&L	1,300,000	1,486,000

Source: Icenl (2022): Nottinghamshire Core & Outer HMA Logistics Study, Table 9.1

- 2.77 The report recommended that the higher range estimates were most appropriate for seeking to determine the unconstrained logistics market requirements being 1,270,000 to 1,786,000 sqm:

“Given that some of the modelling techniques are more exploratory, and that Bassetlaw plays a role in absorbing some subregional needs, on balance it is recommended that the most appropriate range is 1,270,000 to 1,486,000 sqm. Taking into account the current strength of market indicators the recommendation is with the upper figure to be used for planning policy purposes.

*The recommended requirement for planning policy purposes is therefore **1,486,000 sqm or 425 ha** derived from a 0.35 plot ratio. This ratio is appropriate for the delivery of large new logistics parks, but through infill of existing development could fall to 372 ha using a 0.4 ratio. For scale, this is in the order of 3-5 large strategic logistics parks (for example with East Midlands Gateway granted consent in 2016 for 555,000 square metres although this is exceptionally large). Based on stakeholder feedback this requirement is broadly in line with market expectations.” [paragraphs 9.5-9.6]*

- 2.78 Table 2.6 summarises the demand / supply balance position. This firstly takes into account unimplemented permissions and allocations in the study area (of which Mansfield's contribution - as noted above - is just 13,200 sqm). A further position is included allowing for the draft allocations (Ashfield and Erewash) as well as the Freeport proposals (Rushcliffe). The residual need based on the confirmed pipeline is 1,171,000 sqm (335 ha), falling to **601,000 sqm (172 ha)** when taking into account draft allocations and permissions, should they be confirmed.

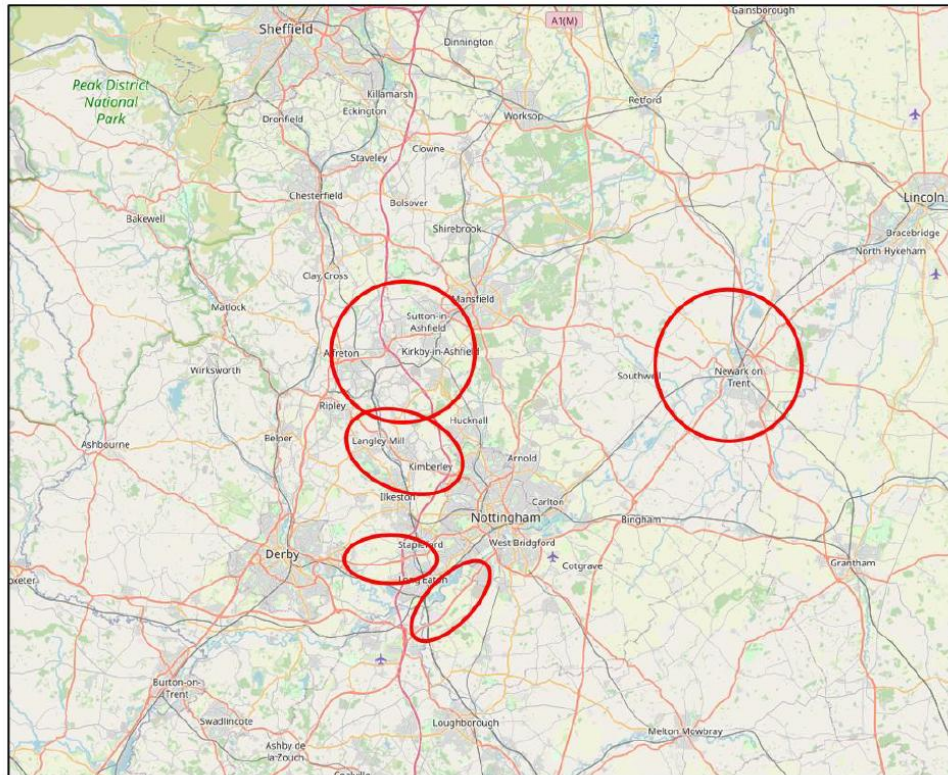
Table 2.6 Study area demand and supply balance

	Floorspace (sqm)	Land (ha, @35%)
Permissions and allocations	315,233	
Demand	1,486,000	
Residual Need	1,170,767	335
Future Pipeline	569,634	
Residual need incl. draft allocations, permissions and future pipeline	601,133	172

Source: Icení (2022): Nottinghamshire Core & Outer HMA Logistics Study, Table 9.2

- 2.79 This 172 ha residual need now falls to the order of one or more realistically two large logistics parks depending on the final status of emerging allocations and the Freeport. The report states that this falls to the lower end of stakeholder perspectives on the market requirement but does assume the delivery of significant developments across the study area most notably at South of Newark, allocations at J27 and Whyburn Farm in Ashfield, the New Stanton site in Erewash and at Ratcliffe on Sour power station.
- 2.80 The report then goes on to claim that some of the need is expected to be generated through the redevelopment of existing logistics or other large manufacturing units. It estimates that 10-20% of future needs could be generated this way which would see the **residual need fall to 137 ha – 155 ha.**
- 2.81 **This residual need now falls to the order of 2-3 large strategic logistics parks depending on the final status of emerging allocations and permissions [paragraph 14.21].**
- 2.82 Given this land shortfall, general broad areas across the study area where new strategic logistics sites should be located (Areas of Opportunity) were identified as follows:
- Area adjacent to M1 Junction 28 and 27 (Sutton in Ashfield, Alfreton, Kirkby in Ashfield and towards Hucknall albeit not all roads dualled notably A611 and A608)
 - Area adjacent to M1 Junction 26 (Langley Mill, Eastwood and Kimberley)
 - Area adjacent to M1 Junction 25
 - Area adjacent to A453
 - Area surrounding Newark (along A1 and A46)
- 2.83 As can be seen from Figure 2.2 overleaf, only a small portion of Mansfield District is located within any of these five Areas of Opportunity due primarily to its distance from the M1. A section of the south-western part of Mansfield is located within the ‘Area adjacent to M1 Junction 28 and 27’.

Figure 2.2 Areas of Opportunity



Source: Icenl (2022): Nottinghamshire Core & Outer HMA Logistics Study, Table 10.1

2.84

In order to ensure that there is a sufficient pipeline of sites across the Areas of Opportunity identified, the report recommended that new strategic sites should be identified and allocated in the following sequential order, namely:

- *“The extension of existing industrial / distribution sites. Site extensions should only be permitted where there is adequate road capacity serving the site and at adjacent motorway/dual carriageway junctions or capacity can be enhanced as part of any extension;*
- *Identifying suitable new strategic distribution sites on previously developed land which meet the site selection criteria; and*
- *Identifying suitable new strategic distribution sites on greenfield land which meet the site selection criteria.” [paragraph 14.24]*

D2N2 Recovery and Growth Strategy 2020

2.85

The Derby, Derbyshire, Nottingham and Nottinghamshire [D2N2] Local Enterprise Partnership [the LEP] produced a series of strategies in recent years, including a Recovery and Growth Strategy in 2020¹³. This sought to facilitate recovery from the impacts of Covid-19 and redress the area’s productivity lag. This would see it become one of the most productive areas of the country by:

- *“Supporting the retraining and reskilling of people to reduce the impact of unemployment on our workforce.*

¹³ https://d2n2lep.org/wp-content/uploads/2022/11/Recovery-Strategy-2020_V4_190121-compressed.pdf

- *Addressing the high proportion of low-skilled and low-earning jobs in D2N2, by upskilling more of the population more quickly.*
- *Ensuing that businesses have the access to co-ordinated support and funding that meets their needs for growth and drives long-term investment.*
- *Providing the skills and space required for businesses to scale and develop.*
- *Continuing to invest in and champion the benefits of innovation, research and development in supporting recovery and growth.”*

2.86 The Strategy also aimed to support the area’s businesses and help people prepare and prosper post-EU exit by opening up new markets for its most competitive businesses and showcasing our world leading sectors to attract investment. The LEP aimed to reduce the area’s reliance on carbon-intensive industries and drive economic growth through growth in clean and green industries, by:

- *“Utilising the closure of our carbon-emitting power stations as an opportunity to spearhead new zero-carbon energy systems and related business clusters.*
- *Decarbonising our housing chains, transport systems and our key carbon intensive sectors.*
- *Nurturing the growth of low and zero-carbon focused businesses.*
- *Using the impact of Covid-19 on other sectors to lead a reskilling programme to enable the growth of our low-carbon sectors.”*

Employment Land Needs of Adjoining Authorities

Ashfield

2.87 The Ashfield Local Plan is currently at examination; however, it has been paused whilst Ashfield District Council [ADC] await further instruction from their inspectors and will recommence later in the year.

2.88 In the Ashfield Local Plan 2023 to 2040: Regulation 19 Pre-Submission Draft, proposed *Strategic Policy S8: Delivering Economic Opportunities* sets out the amount of employment land needed between 2023 and 2040. It identifies a need for approximately 81 ha of employment land over the plan period (to 2040).

2.89 According to this, the employment need will be met within Ashfield District. When approached, the Council did not comment on whether this position had changed but did not identify any cross-border issues.

Gedling

2.90 Gedling Borough Council [GBC] is currently preparing a new single Local Plan with an Issues and Options Paper being consulted on between July and September 2025. The proposed Plan will cover the period 2023 – 2043. It is anticipated the new Local Plan will be published under Regulation 19 in March 2026 and submitted to PINS by December 2026, with adoption anticipated by Spring 2028.

- 2.91 The Local Plan will draw upon the evidence previously prepared for the Greater Nottingham Strategic Plan [GNSP]. GBC will continue to draw upon this where it relates to strategic matters in its Local Plan.
- 2.92 The previous Employment Land Supply produced for the GNSP identified an employment need of 23 ha between 2018 and 2038. Projecting this forward and taking into account completions, GBC anticipates a need of around 20 ha to 2043 (subject to confirmation as the Local Plan progresses).
- 2.93 Officers did note that the wider Greater Nottinghamshire area faces pressures for strategic scale logistics and distribution but stated that Councils across the area are committed to cooperating on this matter and will monitor it accordingly.
- 2.94 Council Officers considered that Gedling can meet its own needs in full within its own area.

Bolsover

- 2.95 Bolsover District Council [BDC] has undertaken a First Review of its Local Plan under Regulation 10A. The Planning Committee in February 2025 concluded that an update of the Local Plan for Bolsover District (2020) was required and BDC will commence plan-making work in June 2027.
- 2.96 An Economic Needs Assessment was carried out for Bolsover, North East Derbyshire and Chesterfield and published in 2025 which covered the period 2022-2044. Factoring in existing supply against demand for employment, this set out a net need for between -1.47 ha to 17.07 ha.
- 2.97 The study also advised on the scale of strategic logistics need within Bolsover, North East Derbyshire and Chesterfield. This recommended between 2 and 3 further strategic B2/B8 parks of at least 25 ha or 1 and 2 larger logistic parks of which one could be 50 ha or more in size.
- 2.98 BDC anticipated that the indigenous employment land needs could be met in full within Bolsover. However, the meeting of future strategic logistics needs will need to be considered by the relevant councils under the Duty to Cooperate.
- 2.99 BDC only identified one-cross boundary issue, with regards to the Pleasley Vale Regeneration Area. Should further sites be considered for future allocation, BDC Officers stressed that traffic impacts on the A617 should be considered.

Bassetlaw

- 2.100 Bassetlaw District Council adopted its Local Plan (covering the period 2020-2038) on 29th May 2024. This identified an employment need for 193.2 ha over the plan period, as well as 118.7 ha for sub-regional/regional logistics need.
- 2.101 Bassetlaw District Council did not identify any cross-boundary employment issues with Mansfield. However, the Council acknowledged that the Trent Valley Supercluster which will be hosted in Bassetlaw, will generate a number of jobs which may have an impact on Mansfield's labourforce.

Newark and Sherwood

- 2.102 Newark and Sherwood District Council [NSDC] will shortly begin consultation on its finalised draft Amended Allocations and Development Management DPD. The Council is also commencing work on its new Local Plan.
- 2.103 The most recent Employment Land Availability Study for the District identified a supply of 185.06 ha against a need of 83.10 ha. The Council considers there to be an ample supply of employment land throughout the District and anticipate its needs to be met in full within the District.

3.0 Socio-Economic Context

3.1 This section summarises evidence at a national, regional and local level to provide the economic and demographic context for this Employment Land Review Update [ELRU]. It reviews key indicators across a range of topics, including economic performance, business demography, labour market, population demographics and deprivation.

Economic Conditions and Trends

Labour Market Indicators

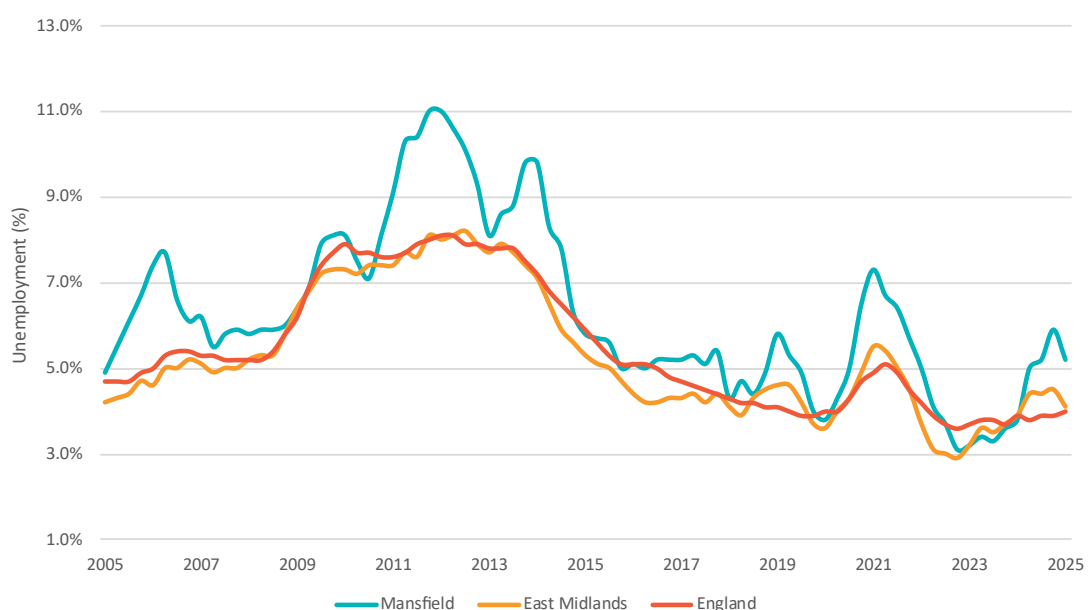
3.2 In the year to March 2025, 77.5% of Mansfield's population aged 16-64 were economically active, meaning they were in or actively seeking employment. This level of economic activity is lower than levels seen across the East Midlands (78.2%) and England (78.8%) over the same period.

3.3 Figure 3.1 illustrates the rate of unemployment in Mansfield, the East Midlands and England between 2005 and 2025. The most recent data (the year up to March 2025) indicates that 2,800 or 5.2% residents of working age were unemployed, which is higher than the regional and national rates of 4.1% and 4.0% respectively.

3.4 Unemployment levels have fluctuated considerably over the past 20 years, peaking at 11.0% around 2011 and spiking again (albeit at a lower level) around 2020, which reflects the impact of the Covid-19 pandemic, before falling and then rising again around the first quarter of 2024. The most recent figures indicate unemployment has started to decline slightly.

3.5 In general, the District has consistently exceeded the rate of unemployment seen both regionally and nationally, sometimes significantly so.

Figure 3.1 Unemployment Rate (2005 – 2025)

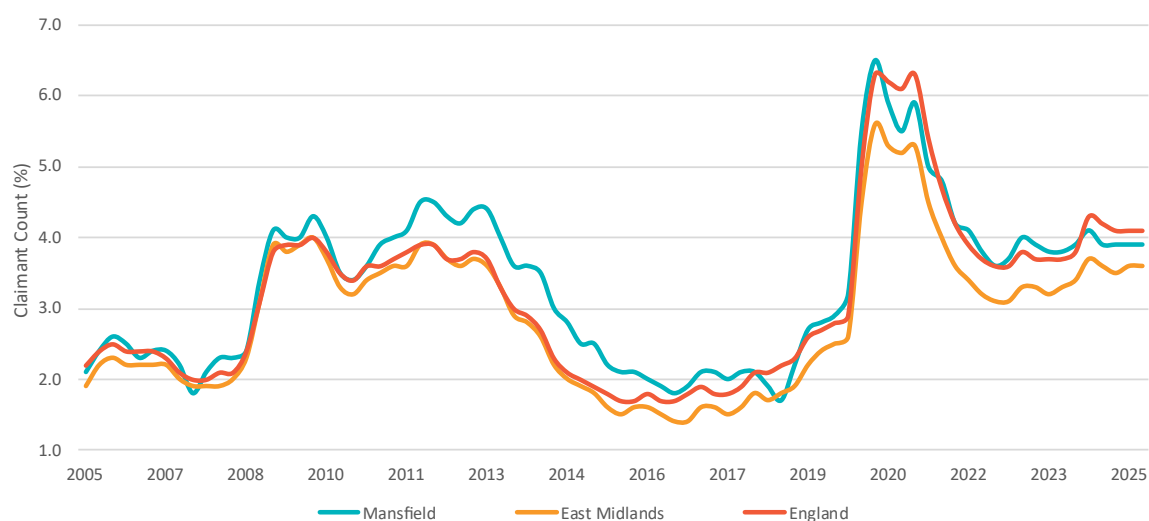


Source: ONS (2025): Annual Population Survey

3.6 Figure 3.2 presents the rate of benefit claimants amongst residents aged 16 – 64 in Mansfield District. Again, the number of claimants in the District have historically been above or more recently, in-line with the regional or national rates, with a few spikes above comparators notably the period 2011 – 2016.

3.7 The series clearly shows the impact of Covid-19, with the number of claimants rising from 2,185 or 3.2% in January 2020, to a peak of 4,470 or 6.5% in July 2020. This peak was above both the regional and national rates. Whilst rates have started to drop, standing at 2,725 or 3.9% in July 2025, they remain above pre-Covid levels.

Figure 3.2 Claimants as a proportion of residents Aged 16 -64 (2005 – 2025)



Source: ONS (2025): Claimant count by sex and age

3.8 As shown in Table 3.1, Mansfield has a median resident-based gross annual income (including people who live in Mansfield but do not necessarily work there) of £33,083 in 2024, which was lower than the East Midlands' median of £34,862 and equivalent national figure of £37,617. Similarly, the workplace-based median income in Mansfield (i.e. people who work in Mansfield but do not necessarily live there) was £32,614. This was still lower than the regional median income of £33,973 and national median income of £37,630. Resident-based incomes are higher compared to workplace-based median incomes which may suggest that people who live in the District commute outside to higher paid jobs. However, it would still suggest that both people who live and/or work in the District, continue to earn below both the wider region and national averages.

Table 3.1 Median gross annual resident and workplace based income (2024)

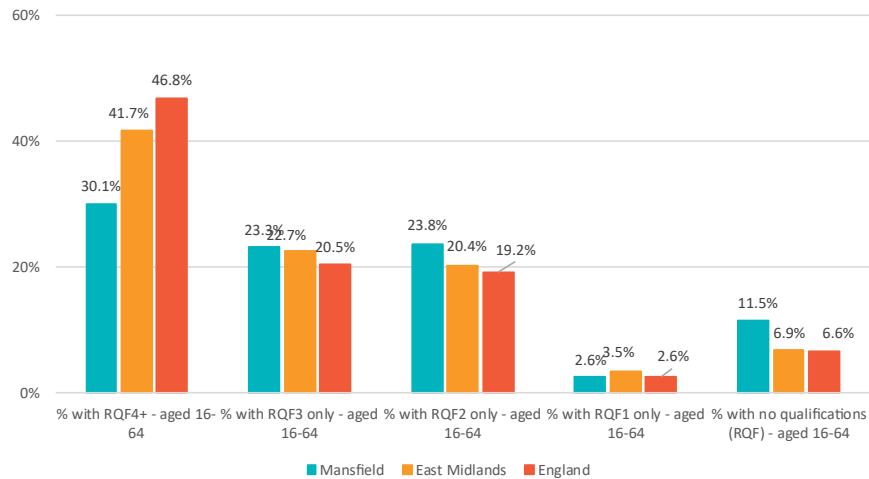
	Resident analysis	Workplace analysis
Mansfield	£33,083	£32,614
East Midlands	£34,862	£33,973
England	£37,617	£37,630

Source: ONS (2025): Annual Survey of Hours and Earnings

3.9 Figure 3.3 shows the share of the District's population aged 16 -64 with qualifications based on the Regulated Qualification Framework [RQF]. Overall, the District is relatively poorly educated compared to the East Midlands and England. Around 11.5% of Mansfield's

residents have no qualifications at all, compared to 6.9% regionally and 6.6% nationally. The District also has a significantly lower share of residents with level four and above RFQs (i.e. degree level or above) than the regional and national rates.

Figure 3.3 Qualification attainment for 16-64 year olds (2024)



Source: ONS (2022): Annual Population Survey

Business Demography and Enterprise

- 3.10 In 2024, there was a total of 3,245 enterprises based in Mansfield, which has grown by 985 (+43.6%) since 2014. This is a considerably higher rate of growth than across the East Midlands (+19.9%) and nationally (+21.5%) over the same period. This growth has been driven by a significant increase in the District’s micro business base, which grew by 965 or +50.4%.
- 3.11 As with the country as a whole, the business mix across the District is heavily skewed towards micro businesses (those with 0-9 total employees) comprising 88.8% of all companies. Around 9.6% of business are small enterprises (those employing between 10 – 49 employees) compared to 9.0% regionally and 8.7% nationally. The share of medium enterprises (50-249 employees) accounts for 1.4% of total businesses, comparable to the regional (1.6%) and national (1.6%) shares. The share of large firms in Mansfield is comparable, at 0.3% versus 0.4% regionally and nationally.

Table 3.2 Share of enterprises by size (2024)

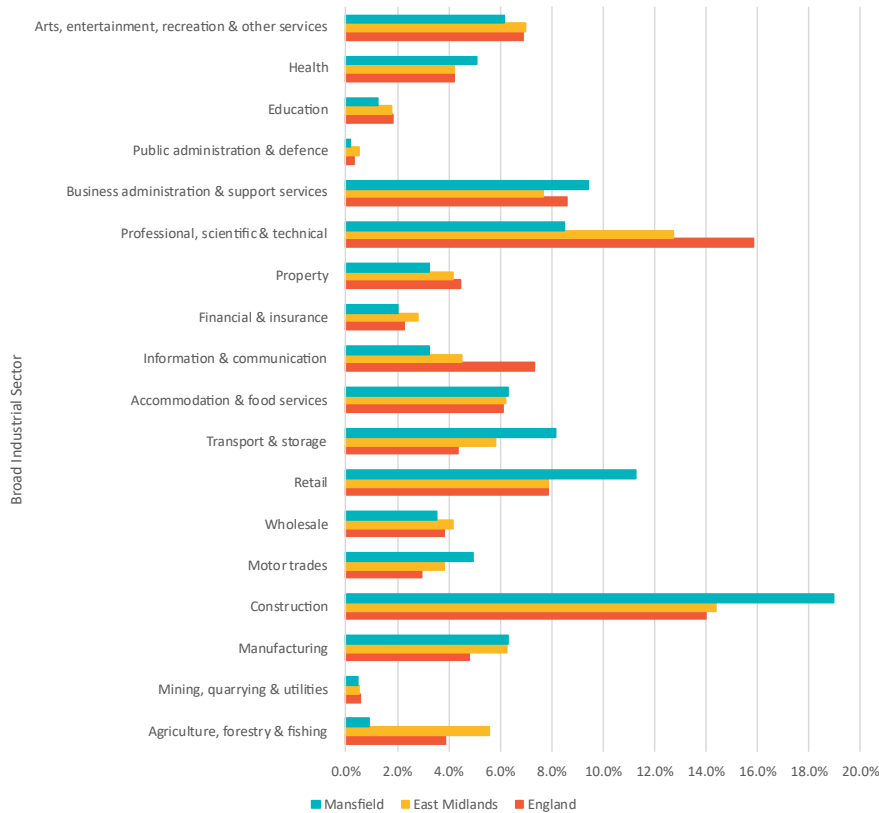
	Mansfield	East Midlands	England
Micro (0 to 9)	88.8%	88.9%	89.2%
Small (10 to 49)	9.6%	9.0%	8.7%
Medium-sized (50 to 249)	1.4%	1.6%	1.6%
Large (250+)	0.3%	0.4%	0.4%

Source: ONS (2025): UK Business Counts – enterprises by industry and employment size band

- 3.12 Figure 3.4 presents the share of enterprises in Mansfield, the East Midlands and England broken down by broad industrial sector. The highest proportion is within the construction sector, at 19.0% (615) of all enterprises in Mansfield. This is followed by the retail sector at 11.3% (365) of all businesses, followed by business administration comprising 9.4% (305).

- 3.13 Relative to the comparator areas, Mansfield has an under-representation of business in professional services, agriculture, and ICT.

Figure 3.4 Share of enterprises by Broad Industrial Sector (2024)



Source: ONS (2025): UK Business Counts – enterprises by industry and employment size band

Employment

- 3.14 Table 3.3 demonstrates that employment levels in Mansfield stood at around 45,125 people in 2023, increasing by around 9,125 or 25.3% over the last decade. This is double the rate of growth seen in the East Midlands (11.9%) and above even the growth seen nationally (15.4%).

Table 3.3 Employment by comparator region, 2013-2023

	2013 Employment	2023 Employment	Change	% Change
Mansfield	36,000	45,125	9,125	25.3%
East Midlands	1,982,000	2,218,000	236,000	11.9%
England	24,481,000	28,246,000	3,765,000	15.4%

Source: ONS (2024): Business Register and Employment Survey 2023 (numbers may not sum exactly due to rounding)

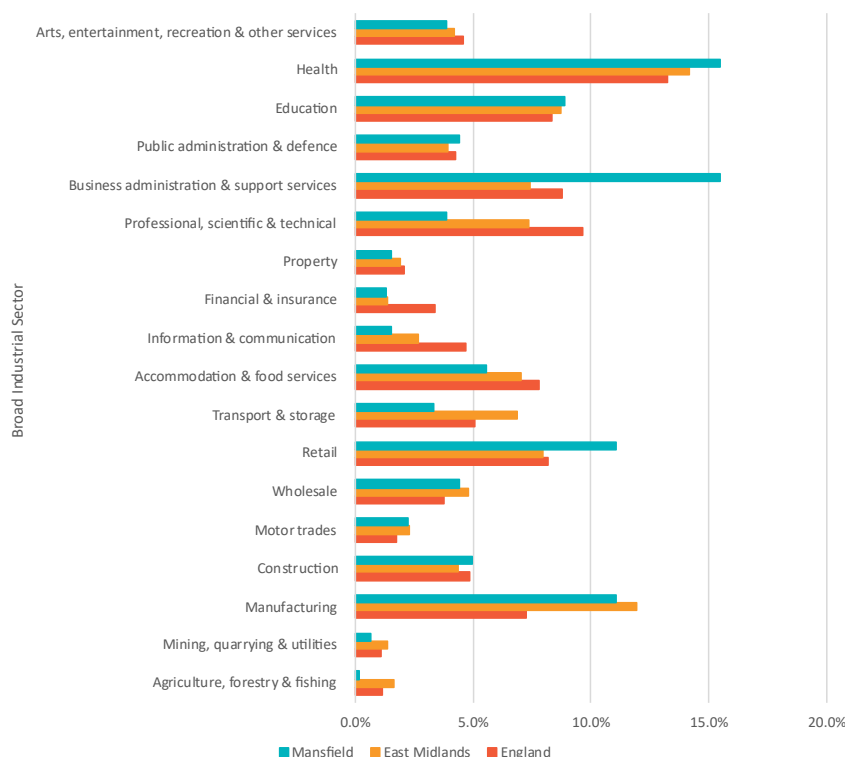
- 3.15 Mansfield had a job density of 0.74 jobs per person in 2023¹⁴. This is a rate below both the regional density of 0.79 and national rate of 0.87.

¹⁴ ONS (2023): Job Density, defined as the number of jobs in an area divided by the resident population aged 16-64.

3.16 Figure 3.5 illustrates the share of employees by broad industrial sector in Mansfield and the comparator areas. Despite the health sector comprising only 5.1% of all businesses in Mansfield, the sector employs 15.5% of workers – a higher rate than across the region (14.2%) and nationally (13.3%). Business administration is also a key source of employment in the District, employing 7,000 or 15.5% of workers. Equally, manufacturing remains an important source of employment, employing 11.1% of all workers, compared to 11.9% across the East Midlands and 7.3% across England.

3.17 Conversely, although the Construction sector companies comprise 19.0% of all businesses in Mansfield, the sector employs only 5.0% of the District's workers, suggesting that many of the companies within the sector are likely to be micro and small enterprises or sole traders.

Figure 3.5 Share of employees by broad industrial sector (2023)



Source: ONS (2024): Business Register and Employment Survey (2023)

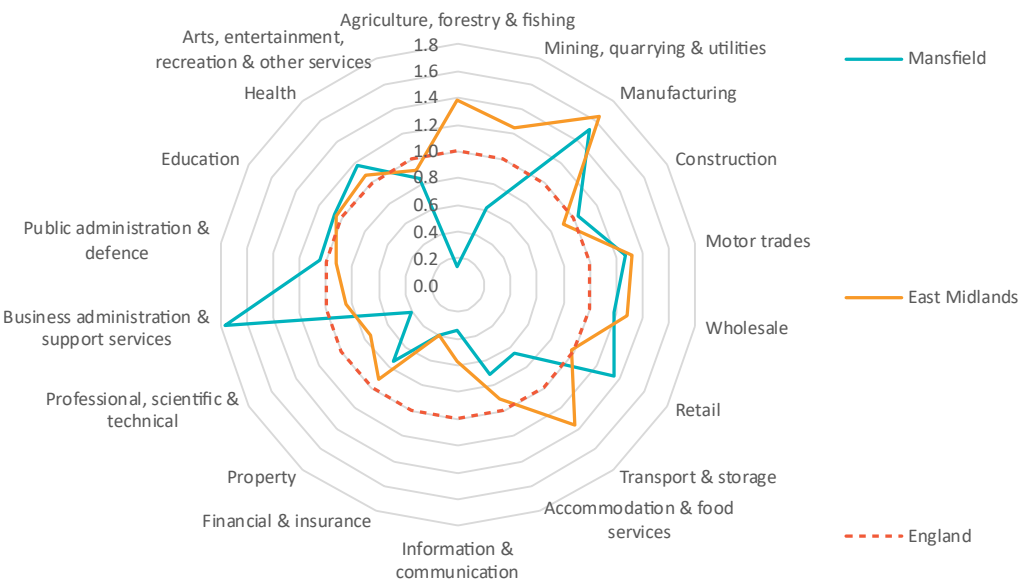
Location Quotient Analysis

3.18 Figure 3.6 assesses the District's current sectoral strengths using location quotients [LQs], which measure the proportion of employment in an industry at the District level relative to the national average.

3.19 A value above 1.0 denotes a higher local representation of a sector compared to the national average, whilst anything below 1.0 signifies an under-representation. In Figure 3.6, the LQs for Mansfield are shown using a blue outline with the national average shown in a red outline. The further the blue outline is from 1.0, the greater the extent of any over or under-representation.

- 3.20 The strength of Mansfield’s business administration sector is clear, with the sector having an LQ of 1.8 which means the District has 80% more employment in this sector than would be expected relative to the national average.
- 3.21 The District also has higher than expected representation in a number of sectors including manufacturing (1.5), retail (1.4) and motor trades (1.3). Meanwhile, there is an under-representation of sectors including agriculture (0.1), ICT (0.3), finance (0.4) and professional services (0.4).

Figure 3.6 Location Quotient Analysis, 2023

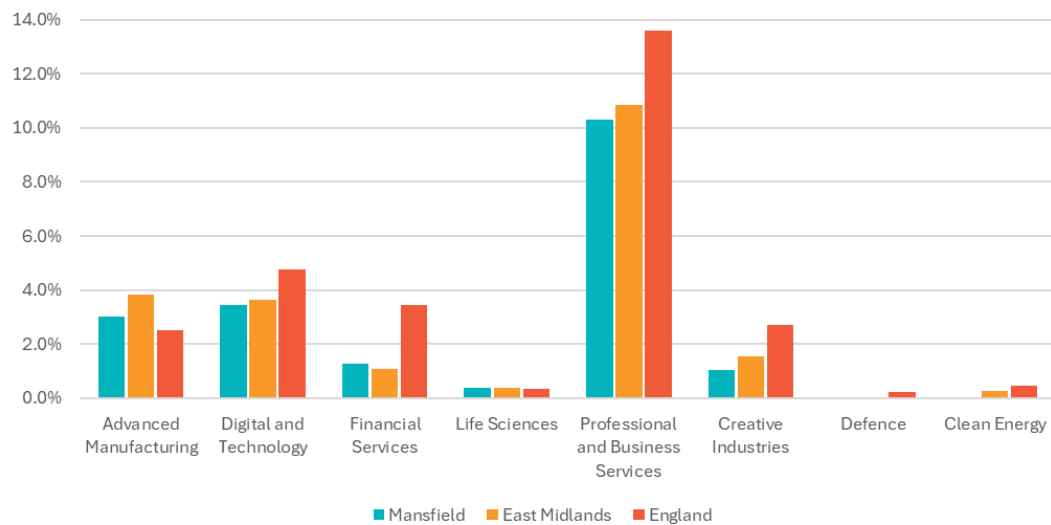


Source: ONS (2024): Business Register and Employment Survey (2023)

Industrial Sectors

- 3.22 Analysis by Lichfields identifies that, of the total employment in the District, Mansfield presently has 8,605 employees, or 19.5% of its total workforce, employed in the IS-8 sectors identified in the Government’s Industrial Strategy. This is below both the wider East Midlands (21.6%) and nationally (28.0%).
- 3.23 When broken down by the IS-8 sectors, Mansfield is under-represented in all of the priority IS-8 sectors compared to the wider region and nationally.

Figure 3.7 Mansfield Employment within IS-8 Sectors

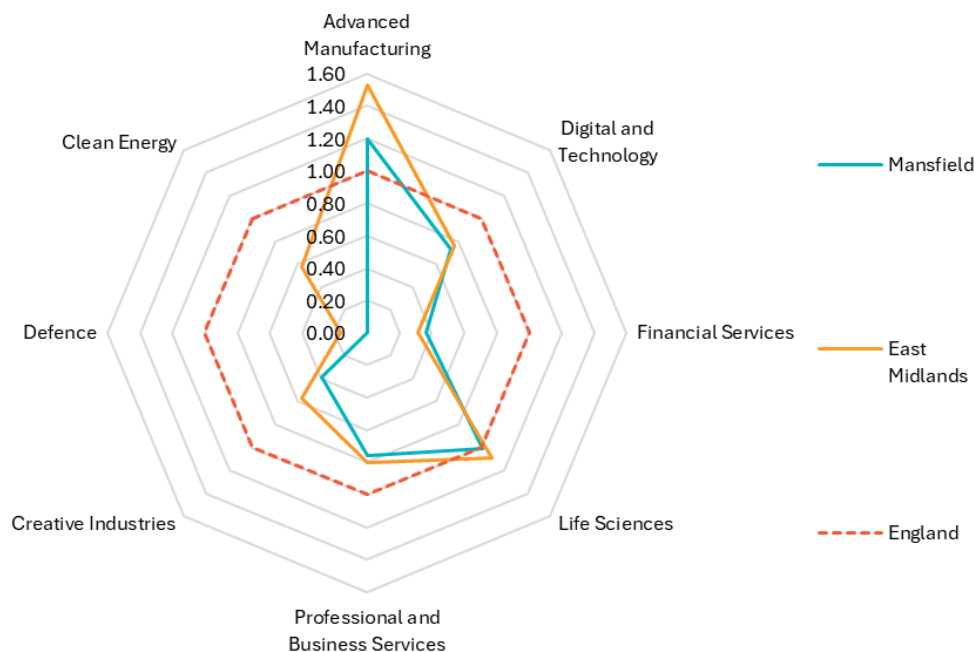


Source: ONS (2024): Business Register and Employment Survey (2023)

3.24

However, when looking at sectoral strengths using location quotients, it is evident that compared to the national average, Mansfield does demonstrate a higher concentration of employment within Advanced Manufacturing with a location quotient of 1.20. This indicates that Mansfield contains 20% more employment in this sector than would be expected relative to the national average. Whilst the East Midlands has an even higher location quotient at 1.53, together this illustrates the important role Mansfield and the wider region play in supporting the economic growth ambitions of the Industrial Strategy.

Figure 3.8 Location Quotient Analysis, 2023

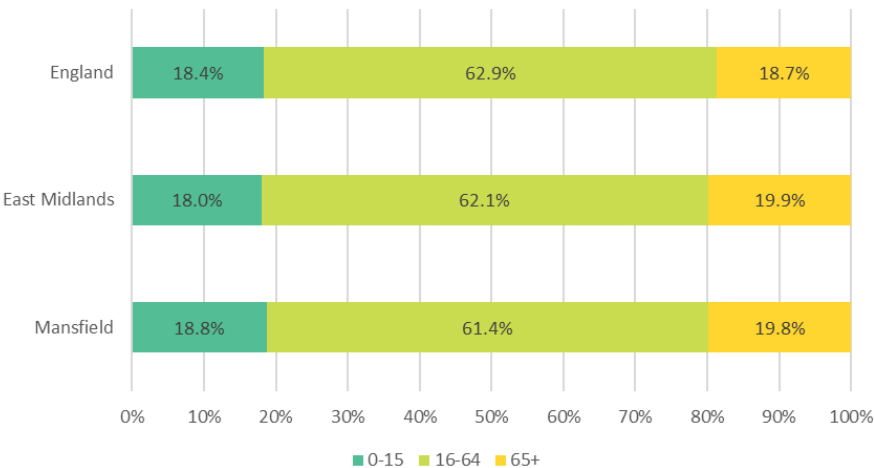


Source: ONS (2024): Business Register and Employment Survey (2023)

Population Demographics

3.25 According to the most recent ONS Population Estimates, Mansfield had a population of 113,138 in 2024¹⁵. Overall, Mansfield contains a slightly lower proportion of working-age residents (16-64), which comprises 61.4% of its population, compared to regional (62.1%) and national comparators (62.9%).

Figure 3.9 Mansfield and Comparator Areas Age Structure (2024)



Source: ONS (2025) Population Estimates

3.26 In the decade to 2024, Mansfield’s population increased by 6,624 people or 6.2%. This growth is below both the wider region (9.1%) and England (7.8%). In particular, Mansfield has encountered a modest growth in its working-age population which increased by just 1,677 residents (or 2.5%) which is more than half the rate of growth regionally (7.3%) and nationally (6.5%). However, the District has encountered a notably higher growth in its younger population (0-15) which increased by 1,958 or 10.2% compared to the region (6.8%) and is double the rate seen nationally (5.0%).

3.27 The number of older residents (65+) increased by 2,989 or 15.4% compared to 17.3% regionally and 15.5% nationally. Whilst the wider region saw a larger increase in its older population, the District’s pattern is therefore in-line with the national picture. Nevertheless, this still highlights that Mansfield, as with the wider region and country, has an ageing population.

3.28 In terms of the future demographic picture, the 2022-based Sub National Population Projections [SNPP] indicate that the population of Mansfield will increase to 119,760 by 2045. This represents a growth of 6,868 or 6.1% over the 20-year period 2025-2045. This is below the growth seen regionally (8.9%) and nationally (8.6%).

3.29 Despite seeing a notable increase in its younger population up to 2024, between 2025 and 2045, Mansfield is expected to see this age group decline by -2,623 or -13.1% compared to -8.5% and -6.1% regionally and nationally. The working-age population of Mansfield is expected to increase by 3,632 or 5.2%. This remains below the rate of growth seen across the wider region (6.9%) and nationally (6.6%).

¹⁵ ONS (2025) Population Estimates

- 3.30 The majority of Mansfield's growth over this period is likely to be in its older population (65+) which is set to rise to 28,798, an increase of 5,859 or 25.5%. This is over four-times the total rate of growth expected across the District. However, this still remains below the rate of growth that is forecasted regionally (29.9%) and nationally (29.7%). Nevertheless, this growth still points towards the ageing population of the District and the additional pressures this will place on Mansfield, as well as the importance of maintaining a strong working-age population to support local services.

Table 3.4 Population Growth for Mansfield and Comparator Areas (2025-2045)

	Mansfield		East Midlands	England
0-15	-2,623	-13.1%	-8.5%	-6.8%
16-64	3,632	+5.2%	+6.9%	+6.6%
65+	5,859	+25.5%	+29.9%	+29.7%
Total	6,868	+6.1%	+8.9%	+8.6%

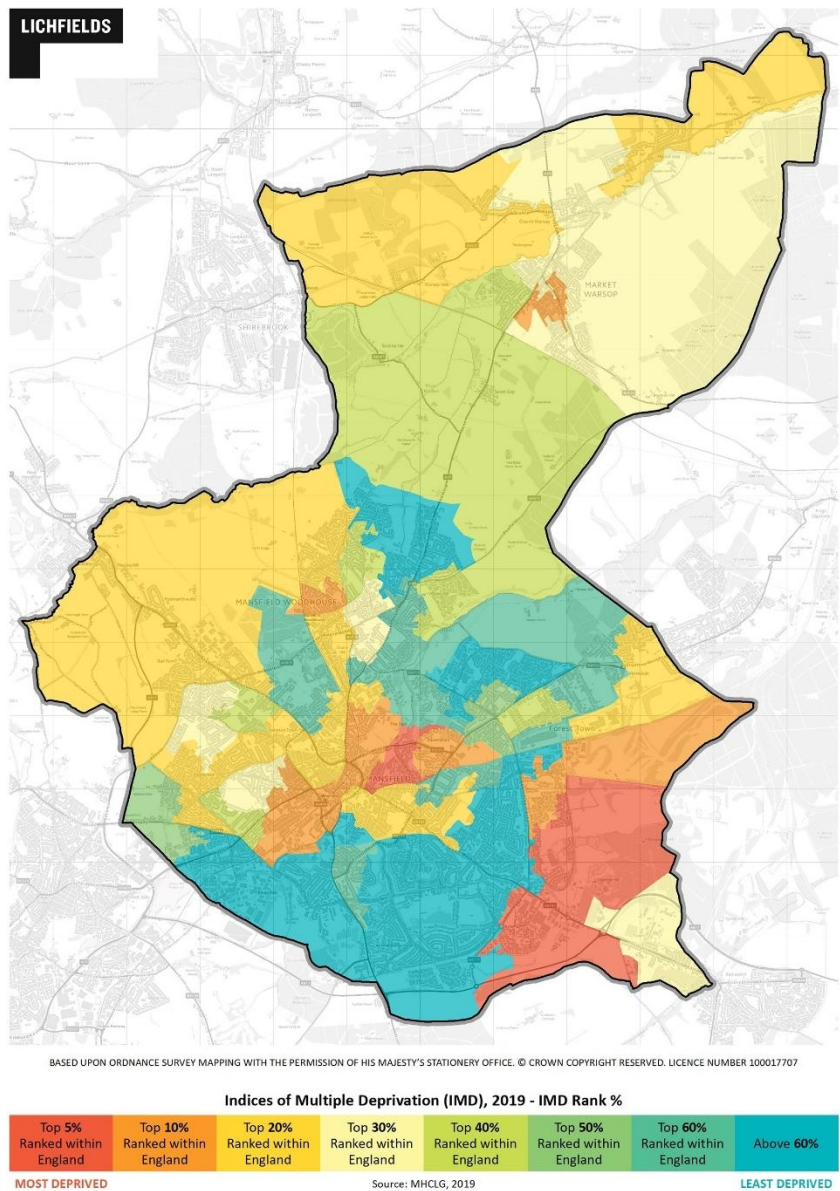
Source: ONS (2022) Population Projections

Deprivation

- 3.31 Deprivation at a local level is measured by the Indices of Multiple Deprivation [IMD], which uses several datasets to rank areas across seven sub-domains of deprivation that range from access to health services to income levels¹⁶. These categories are combined to produce an overall deprivation rank for each local authority in England. The IMD 2019 identifies that out of all 317 local authorities in England, Mansfield is ranked as being the 46th most deprived (based on 'rank of average rank'). It therefore ranks amongst the 20% most deprived authorities nationally.
- 3.32 Figure 3.10 illustrates deprivation across Mansfield by Lower-Layer Super Output Area [LSOA]. Around 40% of the District's LSOAs are located within the top 20% most deprived areas nationally. This is driven by high concentrations of deprivation in education, skills and training (52% of LSOAs), health (52% of LSOAs), and employment (51% of LSOAs).

¹⁶ Ministry of Housing, Communities and Local Government (DLUHC), Indices of Multiple Deprivation (2019)

Figure 3.10 Deprivation in Mansfield District, 2019



Source: DLUHC (2023): Index of Multiple Deprivation 2019

Summary

3.33

Overall, Mansfield demonstrates a mixed performance across a number of economic indicators. Whilst economic activity is similar to regional and national levels, the District faces persistently higher levels of unemployment, has a lower proportion of residents educated above degree-level and a larger base of people with no qualifications. This is reflected in the below-average resident and workplace salaries which sit below both comparators, with many having to commute outside the District for better paid jobs. There are also a number of parts of the District facing significant levels of deprivation, particularly driven by education, employment and health issues which can adversely impact the overall economic performance of an area.

4.0 **Commercial Property Market Signals and Intelligence**

Introduction

- 4.1 This section provides an updated overview of the current stock of employment space in Mansfield District, while summarising latest trends and changes to the supply of this employment space. The amount of employment land and floorspace has been considered across the three main types of employment uses (i.e., office [E(g)(i)(ii)], manufacturing [E(g)(iii)/B2], and warehousing & distribution [B8]).
- 4.2 It then provides an overview of the property market from a national and local perspective. It looks at the key office and industrial employment locations in the District and provides a view on rents and land values. This has been informed by a review of market trends and secondary data, as well as consultations with several stakeholders such as commercial agents and developers active in the District and the wider area, incorporating discussions from a Business Workshop held virtually in September 2025.
- 4.3 This analysis uses data from the following sources:
- 1 Commercial floorspace data from the ONS and various datasets from the Valuation Office Agency [VOA];
 - 2 Monitoring data on commercial space from Mansfield District Council;
 - 3 CoStar commercial property data; and,
 - 4 Discussions with a number of local agents and other commercial stakeholders.

Commercial Overview

Macro-Economic Drivers

- 4.4 Macro-economic trends exert a critical influence on the future performance of Mansfield's economy. These shape the level of demand for the sale of goods and services. In turn this affects business formation and survival, investment decisions, recruitment, wages and productivity.
- 4.5 The outbreak of Covid-19 and resulting pandemic developed rapidly with far reaching impacts on the economy and business across the country. The series of lockdown measures led to unprecedented shutdowns of large parts of the economy simultaneously, with effects being transmitted rapidly across all sectors. With the exception of a brief (albeit sharp) dip in the two quarters of 2021, Gross Domestic Product [GDP] has continued to rise (most noticeably since October 2023).

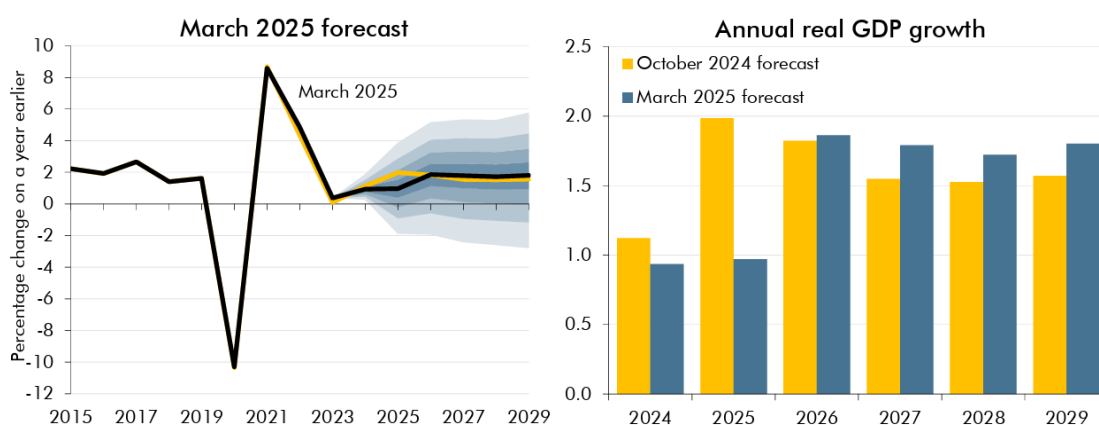
Figure 4.1 GDP Monthly Index, June 2007 – June 2025



Source: ONS (2025): GDP monthly estimate, UK: June 2025

- 4.6 The latest official figures from the ONS show that real GDP grew by 0.4% in June 2025, following a fall of 0.1% in May 2025. Across the quarter to June as a whole, real GDP is estimated to have grown by 0.3% compared with the three months to March 2025, although when compared with the quarter to June 2024, GDP was estimated to have increased by 1.1%.
- 4.7 The Office for Budget Responsibility's [OBR's] latest Economic and Fiscal Outlook [EFO] for March 2025 reported that the economic and fiscal outlook has become more challenging since the new Labour Government's 2024 Autumn Budget. This has been exacerbated by energy price rises across Europe and geopolitical uncertainty which has placed upwards pressure on defence spending and global trade restrictions.

Figure 4.2 Real GDP 2015 – 2029 (forecast)



Note: Successive pairs of lighter-shaded areas around our forecast represent 20 per cent probability bands.

Source: ONS, OBR

Source: OBR (2025): Economic and Fiscal Outlook (March 2025)

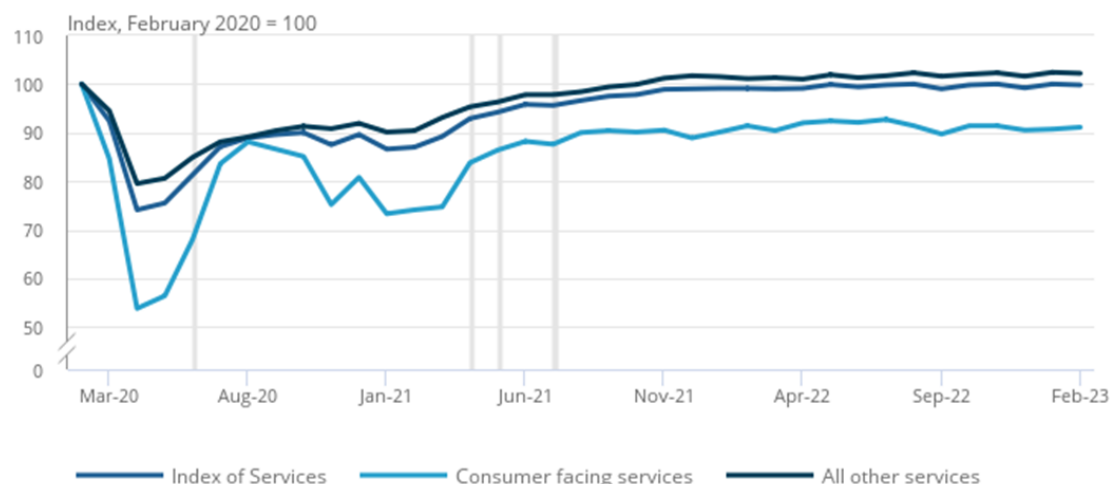
- 4.8 OBR forecasts anticipate that real GDP grew by 0.9% in 2024 which was 0.2 percentage points lower than anticipated in October forecasts. The OBR now expects a similar growth of 1.0% in 2025 which is half the 2.0% growth assumed in October. The main driving factors behind this difference is due to structural weakness in productivity which is expected to remain below the October forecasts and is not forecasted to return to the average levels seen before the global financial crisis until 2029.

- 4.9 The OBR states that both domestic and international uncertainty are largely behind challenges in GDP growth. Market expectations for interest rates remain particularly volatile due to ongoing uncertainty around the monetary and fiscal policy outlook.
- 4.10 Consumer Price Index [CPI] inflation is forecast to rise from 2.5% in 2024 to 3.2% in 2025 but then fall to 2.0% from mid-2026 onwards. Monthly CPI inflation is expected to peak at around 3.8% in July 2025. This is being driven by increases in the Ofgem price cap due to higher energy prices, higher food prices due to an increase in domestic costs, and the increase in regulated water bills from April 2025.

UK Industrial Sector Growth Prospects

- 4.11 According to ONS GDP data for March 2025, the Service sector's output increased by 0.4% in the latest quarter following a growth of 0.7% in the previous quarter. When compared to the same quarter a year ago, it is estimated to be 1.2% higher. The largest positive contributor to growth was ICT, which increased by 2.0%. Within this subsector, the largest contributor was from computer programming, consultancy and related activities, which grew by 4.1%. The largest decrease was in wholesale and retail (including motor trade) which declined by 0.9%.
- 4.12 The construction sector increased by 1.2% in the quarter to June 2025, with a growth of 0.3% in the month to June following a fall of 0.5% in May. The increase in monthly output in June 2025 came solely from an increase in repair and maintenance (up 1.2%), as new work decreased by 0.4%.
- 4.13 Production fell by 0.3% in the quarter to June 2025, although in the month to June 2025 it had grown by 0.7% following a fall of 1.3% in May. The growth in June was predominantly driven by manufacturing output which increased by 0.5% and electricity, gas, steam and air conditioning which increased by 3.3% (Figure 4.3).

Figure 4.3 Monthly index of services, March 2020 to February 2023



Source: ONS (2023): Monthly estimate of GDP, February 2023

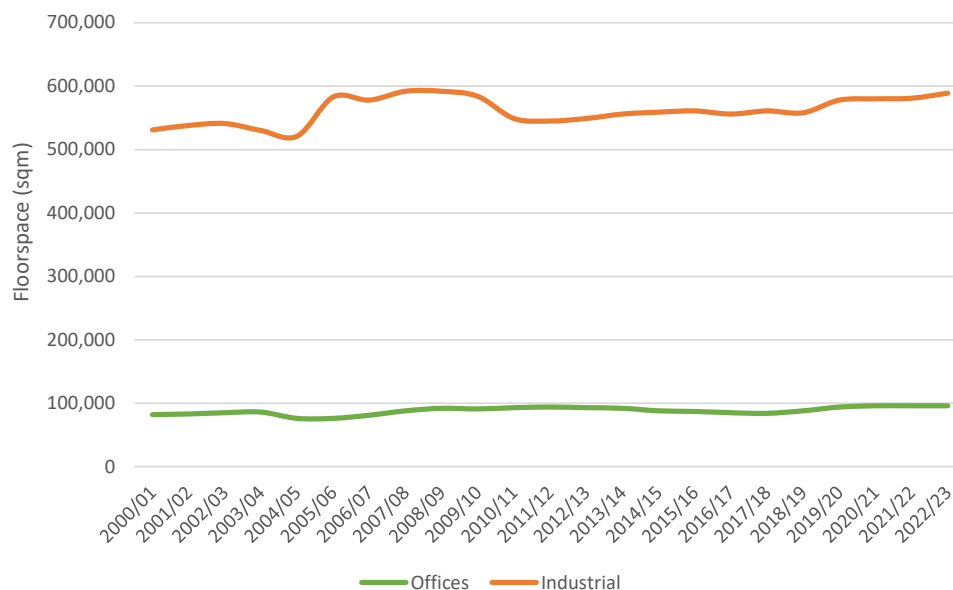
Employment Space

- 4.14 Figure 4.4 and Table 4.1 present data on industrial and office floorspace from the VOA. In total, Mansfield has 685,000 sqm of employment floorspace, of which approximately 86%

comprises factories/warehouses with the remaining 14% offices. Table 4.1 shows that over the period 2000/01 to 2022/23, commercial office space in Mansfield increased by around 14,000 sqm or 17% to reach 96,000 sqm, which remains the peak over the 23-year period. In comparison, the East Midlands and the UK saw increases in office floorspace of 18.4% and 4.4% respectively over the same period.

- 4.15 As for industrial floorspace, over the same time period this increased by 58,000 sqm or 11% to approximately 589,000 sqm in Mansfield District, compared to a similar increase of 12.5% across the East Midlands as a whole, whilst there was a decline of -2.1% nationally.

Figure 4.4 Stock of Employment Floorspace in Mansfield District 2000/01-2022/23



Source: Valuation Office Agency (2024): NDR Floorspace Tables

Table 4.1 Growth in Employment Floorspace (2000/01 – 2022/23)

	Office			Industrial		
	Floorspace (sqm)	Change (2001-2023)	% Change (2001-2023)	Floorspace (sqm)	Change (2001-2023)	% Change (2001-2023)
Mansfield	96,000	+14,000	+17.1%	589,000	+58,000	+10.9%
East Midlands	4,707,000	+730,000	+18.4%	42,766,000	+4,751,000	+12.5%
England and Wales	83,070,000	+3,529,000	+4.4%	337,762,000	-7,170,000	-2.1%

Source: Valuation Office Agency (2024): NDR Floorspace Tables

- 4.16 Furthermore, the overall distribution of office and industrial floorspace has remained relatively consistent over the period, with office floorspace comprising 13.4% of total floorspace in 2000/01, peaking at 14.7% in 2011/12, before falling back to 14.0% by 2022/23.

Spatial Distribution

- 4.17 Commercial property market data from CoStar provides insight on industrial and office floorspace. CoStar is an online commercial property database maintained by a team of market researchers which tracks in detail properties that appear on the market. Whilst this means that CoStar does not capture 100% of properties and floorspace as tracked by the VOA, it is considered as being reasonably accurate for larger properties and provides insight and market analysis that would not otherwise be available.
- 4.18 Regarding industrial floorspace, CoStar reports that there are a total of 339 industrial / distribution units across Mansfield District and 211 office units. Of the total floorspace in the District, 147,427 sqm or 19.5% is office floorspace whilst 609,367 sqm or 80.5% is industrial. Commercial agents were unsurprised that office stock comprised a low proportion of units and floorspace within the District, commenting that Mansfield is not typically seen as an office destination compared to neighbouring towns and cities such as Nottingham and, further to the north, Sheffield, which contain the vast majority of Grade A office floorspace across the wider sub-region.

Table 4.2 Commercial Floorspace in Mansfield

	Mansfield
Office	
Properties	211
Properties (%)	38.4%
Floorspace (sqm)	147,427
Floorspace (%)	19.5%
Industrial	
Properties	339
Properties (%)	61.6%
Floorspace (sqm)	609,367
Floorspace (%)	80.5%
Total	
Properties	550
Floorspace (sqm)	756,793

Source: CoStar Analysis (September 2025) / Lichfields Analysis

Quality of Premises

- 4.19 CoStar's star rating system uses market-tested criteria which allows for analysis of the quality of existing office and industrial stock. CoStar's criteria take account of architectural design, structures/systems, amenities, site/landscaping/exterior, and certifications. This analysis defines low quality properties as those rated 1-2 stars, average quality properties as those rated 3-stars and high-quality properties as those rated 4-5 stars.
- 4.20 Table 4.3 shows a breakdown of office and industrial properties in Mansfield by star rating against the regional comparator. The data indicates that the District's stock is heavily skewed towards lower-quality office premises, with 1-and-2 star premises accounting for 58.8% of total office stock compared to 50.1% across the East Midlands. Of note is the

absence of any 4-and-5 star quality office stock in the District compared to 1.3% of stock across the wider region.

- 4.21 The table also illustrates the quality of industrial properties across Mansfield. As with its office stock, the District also has a higher share of low-quality space, with 51.9% of properties rated 1-and-2 stars compared to 45.6% regionally. There are only three identified industrial units identified as 4-and-5 stars which are all located on Hamilton Way at Oakham Business Park. However, this only comprises 0.5% of industrial stock compared to 2.9% regionally.

Table 4.3 Quality of Properties in Mansfield and East Midlands

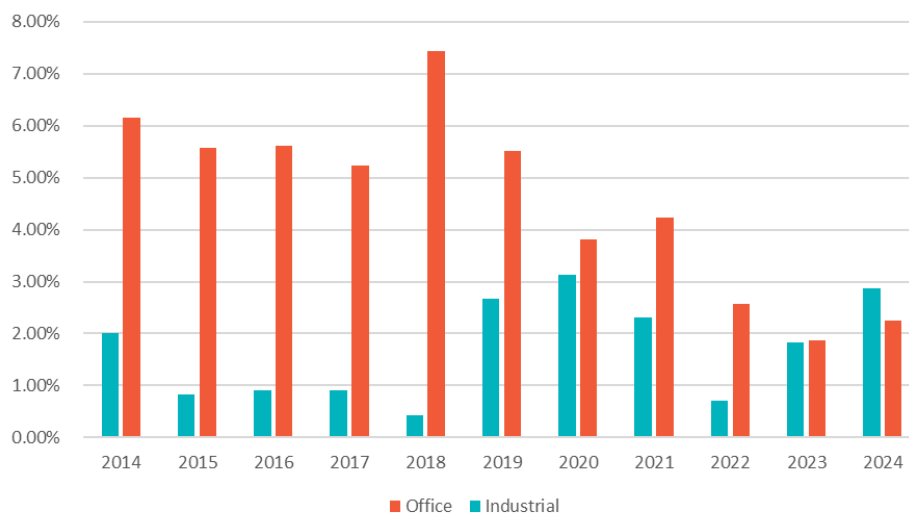
	Mansfield		East Midlands
	Properties	%	%
Office			
1 - 2 Star	124	58.8%	50.1%
3 Star	87	41.2%	48.6%
4 - 5 Star	0	0.0%	1.3%
Industrial			
1 - 2 Star	176	51.9%	45.6%
3 Star	160	47.2%	50.5%
4 - 5 Star	3	0.9%	3.8%
Total			
1 - 2 Star	300	54.5%	47.2%
3 Star	247	44.9%	49.8%
4 - 5 Star	3	0.5%	2.9%

Source: CoStar Analysis (September 2025) / Lichfields Analysis

Vacancy Rates

- 4.22 Data from CoStar shows that the latest yearly figures for vacancies in the office market across Mansfield stood at 2.26%. With the exception of 2023, this remains the lowest figure over the last decade and is around half the average vacancy rate over this 10-year period of 4.57%. Similarly, vacancy rate figures for the industrial market indicate a figure of just 2.86% in 2024. This is the highest vacancy rate figure since 2020, which was likely due to the Covid-19 pandemic, but is still very low.
- 4.23 Both the office and industrial market remain notably below the widely accepted standard figure of around 7.5-8% which is seen to represent a normal, or equilibrium, vacancy rate. When vacancy rates fall below this, particularly when substantially below, this restricts the level of churn available in the property market and creates challenges for new or existing businesses looking for premises to locate into or expand. Figure 4.5 demonstrates that vacancy rates have been consistently below this rule of thumb throughout the analysis period for both office and particularly, industrial floorspace.

Figure 4.5 Office and Industrial Vacancy Rates in Mansfield (2014 -2024)



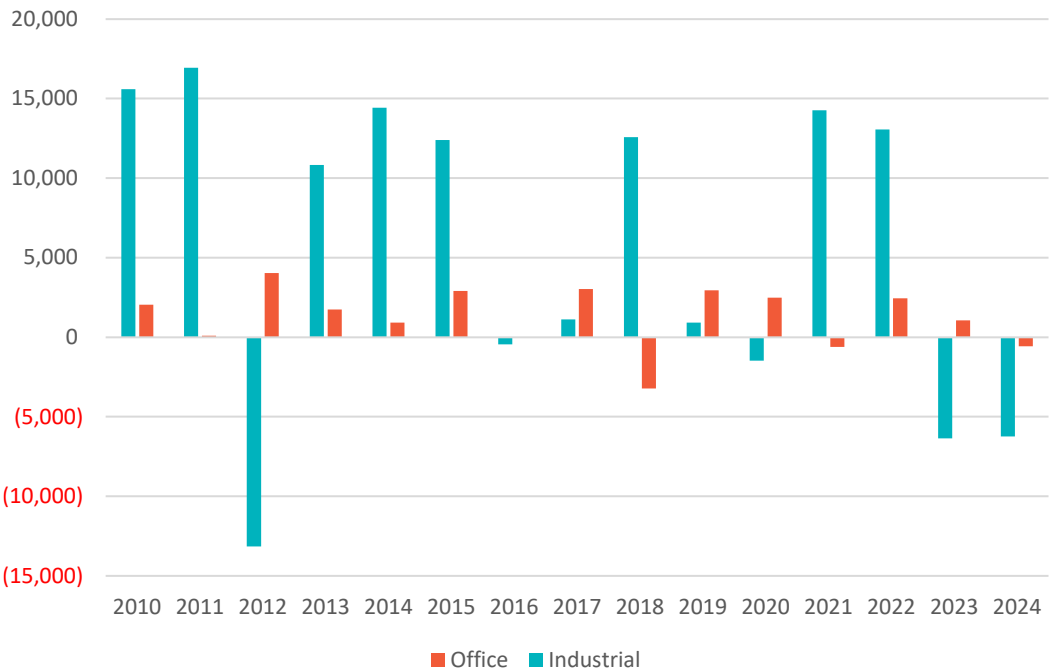
Source: CoStar Analysis (September 2025) / Lichfields Analysis

Net Absorption

- 4.24 Net absorption is a term often used in commercial real estate and relates to the total amount of floorspace that has been leased to an occupier, less the amount of floorspace that has been vacated, during a given time period. In general terms, when the net absorption rate is positive over the defined time period, this means that more floorspace has been leased than has been vacated (and vice versa where the net absorption rate is negative).
- 4.25 As shown in Figure 4.6, net absorption of office and industrial floorspace totalled 19,209 sqm and 84,441 sqm respectively over the 15 years to 2024. Whilst the most recent figures indicate negative net absorption for both office (-575 sqm) and industrial (-6,241 sqm) this conflicts with the 15-year average which saw positive net absorption levels of 1,281 sqm and 5,629 sqm for office and industrial uses respectively. However, since the pandemic in 2020, this figure has remained at a much lower annual average of 958 sqm and 2,652 sqm respectively.
- 4.26 2012 saw the highest level of net absorption for office floorspace in Mansfield, reaching 4,026 sqm and has fluctuated below these levels ever since with a low of -3,225 sqm in 2018. As noted above, net absorption levels for offices in the District have typically been lower since pandemic which is perhaps unsurprising as many office-based businesses across the country have adopted various degrees of remote working which is gradually seeing an adjustment in the total amount of office floorspace required due to rising levels of hot-desking and hybrid working.
- 4.27 This sentiment was shared by commercial agents who noted that Mansfield already had a smaller office market compared to other neighbouring towns and cities in the region, such as Nottingham and Leicester. With a 'flight to quality', many companies have reduced the floorspace required when operating in Mansfield when considering whether to renew or undertake new leases.

- 4.28 Regarding the industrial sector, the past two-years represent the lowest net absorption rate since 2012 (-13,151 sqm) with levels reaching a low of -6,351 in 2023. Commercial agents commented that Mansfield faces a challenge with a lack of available industrial units coming forward which means many businesses are unable to move or take on larger floorspace deals, restricting their growth potential and the number of businesses locating to the District (or indeed expanding and consolidating in the area).
- 4.29 Generally speaking, industrial real estate markets tend to have a positive net absorption rate over any prolonged length of time reflecting new build properties being developed. However, in instances where the vacancy rate is very low and virtually no industrial floorspace is available on the market and no sites are under construction, then it is more likely that net absorption will turn negative as potential occupiers are forced to move out of the study area in search of premises better suiting their needs (either from a quality, size or cost perspective).
- 4.30 This sentiment was expressed by local agents who complained that many local businesses were being forced into renting poor quality units which struggle with asbestos and poor environmental performance. One commercial agent noted that some industrial businesses are having to reconsider where they are located due to requiring a larger and higher quality unit which doesn't currently exist in the District. Whilst agents noted many businesses are keen to remain within the District due to its labour supply and local ties of their employees, there was concern that eventually businesses would have to reconsider their position if new sites were not provided.
- 4.31 Without new sites, companies would either be forced to remain in unsuitable units (particularly from a size or quality perspective), or be forced to leave the District. Agents highlighted that this meant many businesses were unable to undertake growth or expansion ambitions due to lack of suitable sites or premises available.

Figure 4.6 Office and Industrial Net Absorption in Mansfield District



Source: CoStar Analysis (September 2025) / Lichfields Analysis

Development Rates

Completions

4.32

Data on gross completions for the 15-year period 2011/12 to 2023/24 was analysed by Lichfields, based on the Council's Employment Monitoring Reports [EMRs] plus Council Officer's analysis for any missing years. Take up (i.e., completions) of land for employment development has been provided over this time period, broken down by Use Class and is set out in Table 4.4. Over this 13-year period, gross completions for office floorspace in Mansfield District amounted to 11,002 sqm, at an annual average of 846 sqm gross. Over the same time-period, 2.14 ha of light industrial land was developed, alongside 1.77 ha of B2 general industrial, 3.54 ha of B8 and 1.66 ha of Mixed Industrial / Warehousing land. This equates to 9.1 ha of industrial and/or warehousing land in total over the 13 years, at an annual average of 0.70 ha.

Table 4.4 Gross Employment Floorspace (sqm) / Land (ha) Developed across Mansfield District by Use Class (sqm) (2011/12-2023/24)

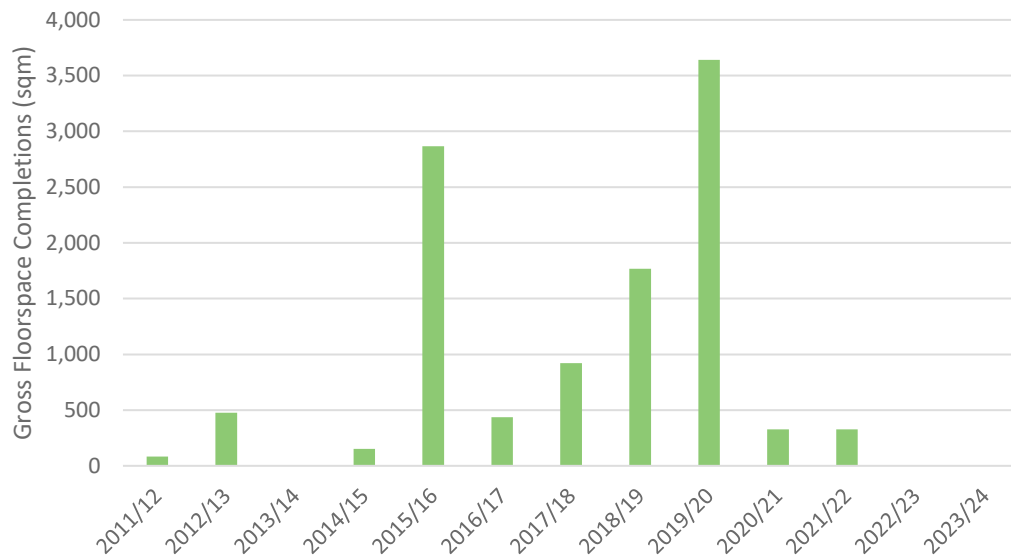
Year	Office (sqm)	Light Industry (ha)	B2 (ha)	B8 (ha)	Mixed Industrial / Warehousing (ha)	TOTAL Industrial / Warehousing (ha)
2011/12	84	0.00	0.00	0.02	0.69	0.71
2012/13	476	0.00	0.00	0.58	0.00	0.58
2013/14	0	0.00	0.12	0.27	0.00	0.39
2014/15	152	0.00	0.00	0.02	0.00	0.02
2015/16	2,865	0.51	0.12	0.00	0.00	0.63
2016/17	437	0.15	0.15	0.61	0.34	1.25
2017/18	922	0.04	0.02	0.03	0.00	0.09
2018/19	1,769	0.01	0.44	0.03	0.12	0.60
2019/20	3,642	1.38	0.12	1.18	0.00	2.68
2020/21*	328	0.01	0.10	0.10	0.00	0.21
2021/22*	328	0.01	0.10	0.10	0.00	0.21
2022/23	0	0.03	0.06	0.37	0.45	0.92
2023/24	0	0.00	0.54	0.23	0.06	0.83
Total	11,002	2.14	1.77	3.54	1.66	9.10
ANNUAL	+846	0.16	0.14	0.27	0.13	0.70

Source: MDC: Annual Monitoring Reports 2013/14 – 2023/24, Council Officers. *Data for 2020/21 and 2021/22 provided cumulatively in the EMR – in this Table it has been split 50:50.

4.33

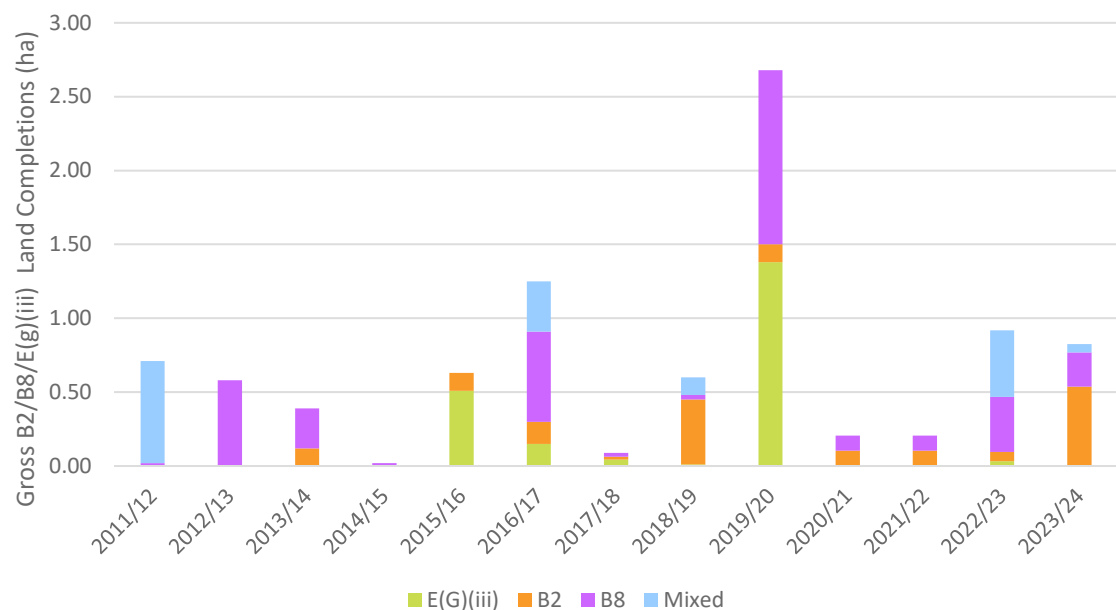
As can be seen in Figure 4.7, delivery of office floorspace has fluctuated over time and until 2019/20, had been on an upward trend, ranging from just 84 sqm in 2011/12 to a peak of 3,642 sqm in 2019/20. However, since that time very little office floorspace has come forward at all. As for industrial / warehousing land, a similar pattern can be observed in Figure 4.8, with a peak of 2.68 ha in 2019/20, followed by a drop off with just 0.83 ha coming forward for the most recent monitoring year. Just under a quarter of all industrial / warehousing land to come forward has comprised E(g)(iii), with 19% B2, 39% B8 warehousing, and the remaining 18% an unspecified mix of industrial / warehousing land.

Figure 4.7 Gross Annual Office Floorspace Completions in Mansfield District 2011/12 – 2023/24 (sqm)



Source: Mansfield Employment Monitoring Reports / MDC Officers 2025

Figure 4.8 Gross Annual B2/B8/E(g)(iii) Land Completions in Mansfield District 2011/12 – 2023/24 (sqm)



Source: Mansfield Employment Monitoring Reports / MDC Officers 2025

Losses

4.34

Employment Land losses are also recorded by MDC in its EMRs dating from 2011/12 to 2023/24, with further information provided by Officers where information is otherwise lacking. As shown in Table 4.5, a total of 24,616 sqm of office floorspace was lost to alternative uses over this time period, at an average of 1,894 sqm per year. The figure was lower for industrial / warehousing uses, with just 2.02 ha lost at an annual rate of -0.16 ha.

Table 4.5 Employment Floorspace / Land Lost across Mansfield by Use Class (sqm) (2011/12 – 2023/24)

Year	Office (sqm)	Light Industry (ha)	B2 (ha)	B8 (ha)	Mixed Industrial / Warehousing (ha)	TOTAL Industrial / Warehousing (ha)
2011/12	-413	0.00	0.00	0.00	-0.01	-0.01
2012/13	-463	-0.10	0.00	-0.02	-0.64	-0.76
2013/14	-2,878	-0.05	0.00	0.00	0.00	-0.05
2014/15	-9,475	0.00	0.00	0.00	0.00	0.00
2015/16	-414	0.00	0.00	0.00	-0.10	-0.10
2016/17	-1,151	0.00	0.00	0.00	-0.27	-0.27
2017/18	-3,976	-0.07	-0.10	-0.09	0.00	-0.26
2018/19	-247	0.00	-0.30	0.00	0.00	-0.30
2019/20	-358	0.00	0.00	-0.04	0.00	-0.04
2020/21*	-1,389	-0.01	-0.04	-0.03	0.00	-0.08
2021/22*	-1,389	-0.01	-0.04	-0.03	0.00	-0.08
2022/23	-2,290	0.00	0.00	0.00	0.00	0.00
2023/24	-172	-0.07	0.00	0.00	0.00	-0.07
Total	-24,616	-0.31	-0.48	-0.22	-1.02	-2.02
ANNUAL	-1,894	-0.02	-0.04	-0.02	-0.08	-0.16

Source: MDC Employment Monitoring Reports / Officers comments. *Data for 2020/21 and 2021/22 provided cumulatively in the 2022 EMR – in this Table it has been split 50:50.

4.35

Factoring in the losses to the gross completions, we can derive a net floorspace / land delivery rate over the past 13 years for Mansfield District. As shown in Table 4.6, this results in a total net loss of -13,614 sqm of office floorspace, or -1,047 sqm per annum. For industrial / warehousing uses, there was at least a positive net delivery rate in recent years, totalling 7.08 ha or 0.54 ha per annum.

Table 4.6 Net Employment Floorspace / Land Completions in Mansfield District by Use Class (sqm) (2011/12 – 2023/24)

Year	Office (sqm)	Light Industry (ha)	B2 (ha)	B8 (ha)	Mixed Industrial / Warehousing (ha)	TOTAL Industrial / Warehousing (ha)
2011/12	-329	0.00	0.00	0.02	0.68	0.70
2012/13	13	-0.10	0.00	0.56	-0.64	-0.18
2013/14	-2,878	-0.05	0.12	0.27	0.00	0.34
2014/15	-9,323	0.00	0.00	0.02	0.00	0.02
2015/16	2,451	0.51	0.12	0.00	-0.10	0.53
2016/17	-715	0.15	0.15	0.61	0.07	0.98
2017/18	-3,054	-0.03	-0.08	-0.06	0.00	-0.17
2018/19	1,522	0.01	0.14	0.03	0.12	0.30
2019/20	3,284	1.38	0.12	1.14	0.00	2.64
2020/21	-1,062	0.00	0.06	0.07	0.00	0.13
2021/22	-1,062	0.00	0.06	0.07	0.00	0.13
2022/23	-2,290	0.03	0.06	0.37	0.45	0.92
2023/24	-172	-0.07	0.54	0.23	0.06	0.75

Year	Office (sqm)	Light Industry (ha)	B2 (ha)	B8 (ha)	Mixed Industrial / Warehousing (ha)	TOTAL Industrial / Warehousing (ha)
Total	-13,614	1.83	1.29	3.33	0.64	7.08
ANNUAL	-1,047	0.14	0.10	0.26	0.05	0.54

Source: MDC Employment Monitoring Reports / Officers comments

Development Pipeline

4.36 According to the Council's most recent Employment Monitoring Report for 2023/24, as of 31st March 2024 there were four employment sites under construction; all of these developments were on previously developed land, and all were for industrial / warehousing uses. They comprise:

- Mason House, Unit 10a, Enterprise Road, Mansfield, for a 0.212 ha extension to an existing B2 Use;
- Units 4-7 Oakwood Road, Mansfield, a new development for 0.007 ha of E(g)(iii) light industrial land;
- Land adj 6 Sherwood Street, Mansfield Woodhouse, a new development for 0.088 ha of E(g)(iii) light industrial land; and,
- 89 Leeming Lane South, Mansfield Woodhouse, a new development for 0.003 ha of B8 warehousing land.

4.37 Within the District there are also 18 sites that currently have extant, live planning permissions. 14 sites have been identified as development on previously developed land and seven of the sites are located within a key / general employment area or are an employment allocation. The total amount of (net) floorspace and land is summarised below:

- Office floor space: -468 sqm;
- Industrial land space: 1.62 ha
- Total when converted to land (ha): 1.57 ha (note: some of the permissions result in a loss of employment land).

4.38 It includes the 1.74 ha of Land at Pleasley Hill Farm, Water Lane for Mixed Industrial development and a 0.047 ha extension to the existing Berry Hill Foods site at Enterprise Road for E(g)(iii) light industrial land.

Commercial Property Market and Stakeholder Engagement

4.39 Discussions were conducted with Commercial Property Agents during one-to-one telephone calls and at the Mansfield Developer Forum [MDF] workshop held with Lichfields and Council Officers to gain an understanding of the current characteristics of the District's commercial property market; the supply and demand of employment sites; and probable future trends.

- 4.40 Regarding the commercial market's overall performance in the last 12 months, agents stated that despite economic uncertainty, the market was performing positively with deals continuing to take place. However, it was noted that 2025 had been a quieter year compared to previous ones. This was not due to lack of demand necessarily, but nervousness from businesses regarding economic performance and caution following previous economic policy announcements (i.e. the increase in employers' National Insurance contributions). Whilst agents remained reasonably optimistic for 2026, it was emphasised that there was still some nervousness as businesses awaited the Chancellor's Autumn Statement announcements, which may mean that investors remain cautious for the remainder of 2025 and into the start of 2026.
- 4.41 Regarding industrial premises, agents noted that there remained strong demand from businesses for new units. In particular, agents and MDF stakeholders commented that the majority of demand was driven by manufacturing businesses rather than distribution as this was reflective of the local business base.
- 4.42 However, market activity was being restricted due to the poor quality of available premises and, just as importantly, a lack of available stock coming forward. Overall, agents found that there was strong level of demand for units up to 100,000 sq ft, with 'starter units' of 2,000 to 3,000 sq ft performing well amongst smaller businesses, as well as those up to 15,000 sq ft for most established local businesses. This sentiment was echoed by the MDF who reported that there was a shortage of units around 10,000 sq ft which often get taken up quickly with very few smaller units coming forward on sites.
- 4.43 Of those that are available, the majority of stock was regarded to be outdated and poor quality to meet business requirements, particularly in terms of environmental performance. Whilst this would typically not be attractive to prospective businesses, with many companies preferring more modern premises, due to the lack of these premises many businesses are forced to compete for outdated stock.
- 4.44 Viability issues were raised as a main reason a lack of new industrial premises were coming forward, as the speculative development market struggled in the face of land availability, rising build costs, and weakening market confidence. As a result, agents were seeing rising rents which they interpreted as reflecting the imbalance between supply and rising demand.
- 4.45 Due to the nature of Mansfield's industrial business base, which is largely local / indigenous businesses, many are unable to relocate far from their current premises or outside of the District due to the available labour supply. This means that if a business cannot access better quality or larger premises, they are constrained in their ability to grow. That said, one agent did note that they were aware of businesses who were actively looking for new premises and were willing to locate outside the District if they could not find a suitable unit in Mansfield. Similarly, the MDF commented that companies had reluctantly relocated to nearby towns such as Ashfield due to this issue. Whilst this allows businesses to capture some of their local labour force, it redirects the wider economic benefits away from MDC (i.e. business rates) and increases levels of out-commuting.
- 4.46 In terms of office space, agents indicated that this was a much smaller market in the District as Mansfield was not typically regarded as an office destination. Whilst some industrial businesses will have office functions within their sites, agents had noticed a shift post-Covid. Overall, agents were finding that there was an overall reduction in demand for office space. Where industrial units previously had office-based premises on-site, a number had shifted this towards remote-working or hot-desking due to a lack of need for office floorspace. In some cases, agents were aware of businesses using larger towns or cities,

such as Sheffield or Nottingham, to carry out office-related activity given the available labour supply in larger cities and the higher quality Grade A stock available.

- 4.47 Regarding popular sites and premise locations in Mansfield, agents expressed the view that many businesses do not necessarily focus on being located in Mansfield but rather base decisions on proximity to locations such as the M1 and key junctions such as Junctions 28 and 29a.
- 4.48 Looking forward, agents and MDF stakeholders commented that inward investment was coming forward in activity related to advanced manufacturing, engineering and construction. The MDF was seeing a growing role for aerospace, defence and the automotive industries (particularly in the wider supply chain), a trend that was also reiterated by commercial agents. This activity was expected to come forward from both multi-national organisations, such as Glenair and ITP Aero, through to smaller businesses. Whilst agents were complimentary of MDC's efforts to date, it was stressed that continued proactive and regular engagement with the private sector could see these opportunities grow further.

5.0 Forecasting Future Employment Needs

Introduction

- 5.1 This section considers Mansfield District’s future quantitative economic growth needs. It models a range of scenarios over the 20-year Plan period 2023 to 2043. These scenarios consider the need for office and industrial (i.e. manufacturing and warehousing) floorspace. The final requirements are specified in floorspace (sqm) for E Class office (incorporating R&D), and land (in hectares) for E-Class light industrial, B2 and B8 uses.
- 5.2 Whilst we have modelled the baseline forecast growth using Experian’s June 2025 econometric projections, we have also compared this more pessimistic model run with an Economic Growth scenario, as well as taking into account past delivery of employment space and the potential labour supply generated by housing growth scenarios in this report.
- 5.3 The forecast demand scenarios are based on a quantitative requirement and do not take into account qualitative factors that may influence the actual requirement.

Methodology

- 5.4 The Government’s Planning Practice Guidance [PPG] advises on how to calculate future employment land requirement. The PPG¹⁷ sets out that strategic policy making authorities will need to “*develop an idea of future needs based on a range of data which is current and robust, such as:*
- *sectoral and employment forecasts and projections which take account of likely changes in skills needed (labour demand)*
 - *demographically derived assessments of current and future local labour supply (labour supply techniques)*
 - *analysis based on the past take-up of employment land and property and/or future property market requirements*
 - *consultation with relevant organisations, studies of business trends, an understanding of innovative and changing business models, particularly those which make use of online platforms to respond to consumer demand and monitoring of business, economic and employment statistics.*
 - *Authorities will need to take account of longer-term economic cycles in assessing this data and consider and plan for the implications of alternative economic scenarios.”*
- 5.5 An aspirational ‘regeneration-led’ scenario has been included which takes into account additional demand that could be generated by key growth sectors, private sector developments and interventions.
- 5.6 The forecast employment land scenarios covering the 20-year Plan period from 2023 to 2043 are:
- 1 Baseline employment forecasts (**Labour Demand**), using Experian’s Local Market Quarterly Forecast for June 2025, which indicates a net workforce job growth of 4,500 over the plan period;
 - 2 An **Economic Growth** projection which considers in more detail the key growth sectors identified in the LEP’s Strategic Economic Plan [SEP] and Local Industrial

¹⁷ Planning Practice Guidance – Reference ID: 2a-027-20190220

Strategy. This scenario has been derived in conjunction with Mansfield District Council's Economic Development Officer [EDO].

- 3 A demographically-derived assessment of growth in the **Labour Supply**. This stage involves translating forecasts of population growth based on planned housing levels (495 dpa for the Standard Method) into numbers of working-age and economically active residents requiring jobs, splitting these into E(g)(i) and B Class jobs and then applying job/floorspace ratios as for the job-based estimate. It is based on outputs taken from the Council's Housing Needs Study (2025) which provided a range of sensitivity tests to translate housing growth to jobs based on changes to economic activity rates over time and commuting patterns; and,
- 4 **Past Take-Up** of employment land. The final scenario projects forward past annual take-up rates of employment land by type using Mansfield District Council's monitoring data, using longer term data (over the past 13 years) but avoiding distortions from constrained land supply or a few major developments. A second trend based analysis has involved trending forward net absorption rates over the same time period, using data from CoStar.

- 5.7 All these approaches reflect different factors and careful consideration needs to be given as to how appropriate each is to Mansfield's particular set of circumstances and policy aspirations. In addition, to be robust, the economic growth potential and likely demand for employment space needs to be assessed under different future sensitivities, to reflect lower or higher economic growth conditions arising in future.
- 5.8 The ultimate judgement regarding the level of employment need that the Council should plan for is not, therefore, simply shaped by a consideration of quantitative analysis. A range of qualitative factors should be considered, that would typically consider the quality and demand for existing premises, the spatial distribution of supply and demand for premises, and insights from commercial property agents and local businesses.
- 5.9 Experian econometric job forecasts were obtained by Lichfields to underpin this analysis. It should be emphasised that such forecasts tend to be most reliable at regional and national scales and consequently less so at the local economy level. Nevertheless, they provide a valuable input in respect of understanding future land needs by indicating the broad scale and direction of economic growth in different sectors.
- 5.10 It should also be noted that this ELR Update considers the 'indigenous' employment needs arising from economic and employment growth in Mansfield to 2043 and does not take specific account of other strategic/inward investment needs or requirements that may arise from other areas, other than to the extent that Mansfield has accommodated a share of these needs historically and accordingly they are reflected in the trends which inform the various forecasts within the assessment. This has already been undertaken by Icenl in its Nottinghamshire Core & Outer HMA Logistics Study (August 2022) and we do not update that analysis here.

Results

Scenario 1: Experian Baseline June 2025

- 5.11 Experian's model takes account of the existing economic structure of each Local Authority (broken down by economic sector) and the historical relationship between the regional performance of an industry and the performance observed at the Local Authority level. The forecasts of job growth by sector used here reflect recent trends and economic growth

projections at national and regional level, and how economic sectors in Mansfield have fared relative to the East Midlands region's growth in the past. They are not constrained by either labour supply or land availability.

Experian Scenario Assumptions: June 2025

"Data published by the Office for National Statistics (ONS) data confirmed that GDP for the UK grew by a mere 0.1% in Q4 2024, unchanged from the initial estimate. However, minor upward revisions from Q4 2023 to Q2 2024 underpin stronger growth for 2024 (1.1% versus 0.9%). Looking ahead, the UK is projected to see a similar performance in 2025, given elevated borrowing costs, geopolitical tensions, and rising inflation." [page 9]

"Data from the ONS showed that UK GDP grew by a robust 0.7% in Q1 2025. However, the economy is expected to post similarly weak annual growth in 2025 as in 2024, amid a range of domestic and global headwinds." [page 15]

"UK economic activity strengthened in Q1 2025, with services output rising by 0.7% and retail sales supported by strong real income growth. Production also expanded, led by a 1.1% rise in output and a rebound in manufacturing. However, construction stalled on the quarter, despite year-on-year growth. Consumer caution remains evident amid ongoing economic uncertainty." [page 15]

"Business sentiment remains subdued amid global trade uncertainty and domestic weakness. The UK S&P Flash Composite Purchasing Managers' Index [PMI] rose to 49.4 in May, up from 47.2, but remains in contraction. Services edged into growth at 50.2 from 49.0, while manufacturing slipped further to 45.1 from 45.4. Despite weaker order books manufacturing optimism improved slightly, while service sector confidence rebounded more strongly, supported by stabilising global financial conditions following recent rate cuts." [page 16]

"On the 26th March the Chancellor of the Exchequer Rachel Reeves delivered the 2025 Spring Statement against a challenging economic backdrop. The government remains steadfast to their fiscal rules, with no further changes announced to VAT, income tax, or employee National Insurance Contributions, necessitating tough decisions to balance the public finances. Economic growth has stagnated in recent months, prompting the Office for Budget Responsibility (OBR) to revise down their 2025 GDP forecast from 2% in October to 1% in March. The Treasury's minuscule fiscal headroom of £9.9bn by 2029-30, is unchanged since October, contingent on the measures announced today. Rising borrowing costs and geopolitical tensions complicate the situation further and given a weakened GDP outlook alongside stringent fiscal constraints, tax hikes in the Autumn 2025 Budget are a distinct possibility." [page 10]

Source: Experian UK Macro Economic Forecast June 2025

5.12 Before presenting the job growth outcomes from the scenarios it is worth highlighting in broad terms, limitations in how these were generated:

- 1 They are predominantly trend-based estimates projecting historic growth patterns into the future.
- 2 For the Experian projections, the population data that underpinned the modelling comprises the ONS 2023 Mid-Year Estimates [MYE] and the ONS 2022-based

population projections for England, with the regions and lower-level data using the 2018-based SNPP.

- 3 The forecasts do not consider policy influences and unforeseen impacts of individual business decisions.
- 4 There is not always a clear-cut relationship between employment change and employment land needs. Additional employment space may be required even if employment itself is falling; for example, if a manufacturing firm requires more space to enable greater automation and achieve job reductions through productivity gains.

5.13 Reflecting the greater than usual degree of uncertainty and variability attached to the most recent forecasts, they may need to be re-considered closer to the Local Plan examination stage depending on how the economic situation changes in the intervening period.

5.14 A detailed breakdown of the various projections is provided in Table 5.1 for Mansfield (and comparator areas). The Table indicates that the June 2025 Experian baseline workforce employment projections reported a period of sustained employment growth over the past decade or so. Between 2013 and 2023, Mansfield District's economy grew by 5,300 jobs, equal to a Compound Annual Growth Rate [CAGR] of +1.24%. This is a higher level of growth than the regional rate of 1.12 % over the same time period and also the UK-wide figure of 1.17%. However, it is much higher than the previous decade of 2003-2013, when the District only grew by 600 jobs.

5.15 Over the Plan period of 2023-2043, the June 2025 projections indicate that Mansfield's economy will grow by 4,500 jobs equal to a CAGR of 0.95%. Although this is below the regional and national growth forecasts, it nevertheless indicates a significant level of positive economic growth.

Table 5.1 Workforce Jobs Growth for Mansfield and comparator areas

	2003-2013		2013-2023		2023-2043	
	Net Job Growth	CAGR	Net Job Growth	CAGR	Net Job Growth	CAGR
Mansfield	600	0.15%	5,300	1.24%	4,500	0.95%
East Midlands	138,290	0.65%	260,180	1.12%	342,170	1.31%
United Kingdom	1,673,760	0.53%	4,015,490	1.17%	5,299,090	1.37%

Source: Experian UK Macro Economic Forecasts June 2025

5.16 Table 5.2 summarises those sectors expected to experience the largest absolute increases or decreases in employment for Mansfield over the Plan period. Experian projects a growth equal to 4,500 net jobs between 2023 and 2043, driven primarily by Residential Care & Social Work (+900); Education (+800); Construction (+700); Health (+600); Accommodation & Food Services (+500); Professional Services (+400) and Public Administration & Defence (+400). Job losses are predominantly concentrated in one sector – Administration and Support Services – which is projected to fall by 700 jobs over the next 20 years due to ongoing structural changes in the economy (with 100 job losses also in Other Private Services and Recreation).

Table 5.2 Job Change across Mansfield (2023 to 2043)

	2023	2043	Net Change
Accommodation & Food Services	2,500	3,000	+500
Admin & Supportive Services	6,700	6,000	-700
Agriculture, Forestry & Fishing	0	0	0
Air & Water Transport	0	0	0
Computing & Information Services	600	700	+100
Construction	3,300	4,000	+700
Education	4,400	5,200	+800
Extraction & Mining	0	0	0
Finance	600	700	+100
Fuel Refining	0	0	0
Health	2,200	2,800	+600
Insurance & Pensions	0	0	0
Land Transport, Storage & Post	1,200	1,200	0
Manufacturing	4,800	4,900	+100
Media Activities	0	0	0
Other Private Services	700	600	-100
Professional Services	1,900	2,300	+400
Public Administration & Defence	2,100	2,500	+400
Real Estate	700	1,000	+300
Recreation	1,400	1,300	-100
Residential Care & Social Work	4,400	5,300	+900
Retail	4,800	5,000	+200
Telecoms	0	0	0
Utilities	300	300	0
Wholesale	3,000	3,300	+300
TOTAL	45,600	50,100	+4,500

Source: Source: Experian (June 2025) / Lichfields' analysis

Key: **ORANGE** = Office/Industrial sector **GREEN** = Part Office/Industrial sector

- 5.17 In translating these jobs into employment land requirements, the analysis includes an allowance for jobs in other non-employment sectors that typically utilise industrial or office space, such as some construction uses, vehicle repair, courier services, road transport and cargo handling and some public administration activities. This is because a certain proportion of these jobs will occupy premises falling within the office/industrial sectors.
- 5.18 Using Experian's baseline forecasts (which are based to an extent on past trends and current representation across the industrial classifications relative to the national and regional averages), Table 5.3 indicates positive growth in E(g)/B-class jobs for Mansfield overall, equal to +1,879 between 2023 and 2043, with most of the growth in the non-B uses. There is, however, healthy growth in office-based activities (of 1,020) and to a lesser extent light industrial (+522), with limited growth of +129 in general industrial and +207 in B8 jobs.

Table 5.3 Forecast Employment Change in Mansfield 2023-2043 – Baseline Total Workforce Jobs

	Office*	Light Industrial**	B2 General Industrial***	B8 Warehousing****	Total Office / Industrial / Distribution Jobs	Other Jobs	Jobs in All Sectors
Mansfield	+1,020	+522	+129	+207	+1,879	+2,621	+4,500

Source: Experian June 2025 / Lichfields Analysis. Note: rounding means that sums to not always add.

*includes a proportion of public sector employment and administration & support services

**includes some manufacturing, vehicle repair and some construction activities

*** includes manufacturing and some construction/utilities

****includes elements of transport & communications sectors

- 5.19 To translate the resultant job forecasts into estimates of potential employment space it is necessary to allocate the level of employment change forecast for office, industrial, and wholesale / distribution uses as follows:
- 1 The office floorspace requirement is related to job growth / decline in the financial and business service sectors¹⁸;
 - 2 The light industrial floorspace requirement is related to job growth / decline in some manufacturing sectors, specialised construction activities and some wholesale trades¹⁹;
 - 3 The general industrial floorspace requirement is related to job growth / decline in most manufacturing sectors²⁰; and,
 - 4 The wholesale / distribution floorspace requirement is related to job growth / decline in the industrial sectors of wholesale and land transport, storage and postal services.²¹
- 5.20 Lichfields has translated the resulting figures into employment land projections using standard employment densities that have been applied to the forecast job change figures (based upon the latest Homes and Communities Agency [HCA]²² guidance on employment densities). These translate Full Time Equivalent jobs [FTEs] into workforce jobs, and plot ratios by use class.
- 5.21 For the purposes of this ELR Update it has been assumed that:
- 1 One general office workforce job requires 12.5 sqm of employment floorspace (Gross External Area [GEA]);
 - 2 One light industrial job requires 47 sqm of employment floorspace [GEA];
 - 3 One general industrial workforce job requires 36 sqm of employment floorspace [GEA]; and,
 - 4 One job per 65 sqm for general, smaller scale warehousing (assumed to account for around half of future space) and 1 job per 79 sqm for medium scale units (assumed to account for the remaining 50% of future space). Very few large scale/‘big box’ logistics units have been constructed in Mansfield in recent years.
- 5.22 The HCA Guidance takes account of recent trends in terms of the changing use of employment space, the main change being the more efficient utilisation of office space due

¹⁸ i.e. Majority of BRES Sectors 58-74, Office administration and support, some activities of membership organisations and a proportion of Public Administration and Defence

¹⁹ Some printing and recording media; manufacture of computer and electronic products; some manufacture of furniture and repair & installation of machinery & equipment; majority of Specialised Construction Activities, plus car repair.

²⁰ Remaining Manufacturing sectors, plus some construction and waste and remediation activities.

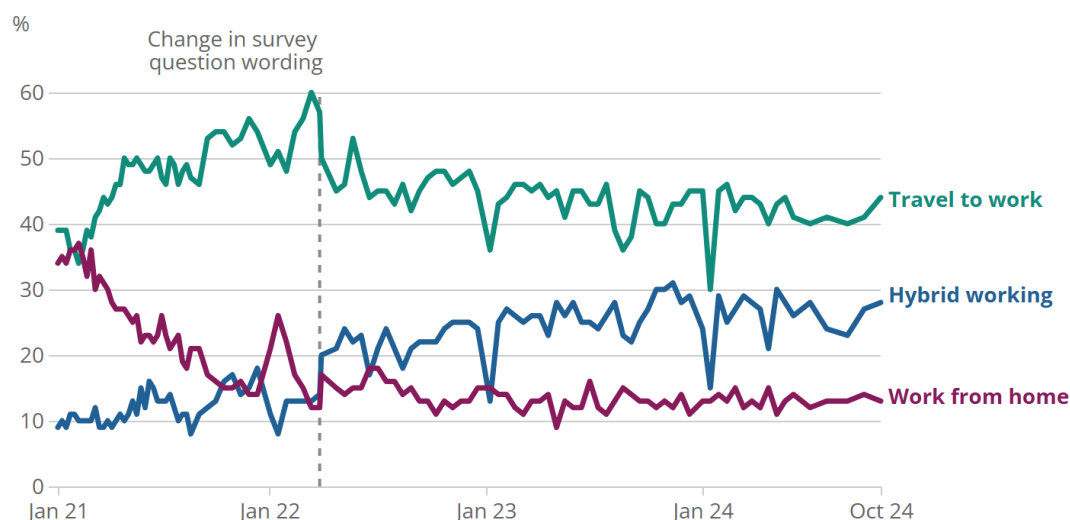
²¹ Wholesaling less car repairs retail car sales, plus post/couriers and land transport

²² HCA (November 2015): *Employment Densities Guide, 3rd Edition*

to increased flexible working and hot-desking. This has resulted in a decrease in the amount of floorspace per office worker compared to previous guidance.

- 5.23 The Covid-19 pandemic dramatically altered working patterns. Throughout 2022 the percentage of working adults reporting having worked from home varied between 25% and 40%, without a clear upward or downward trend, indicating that homeworking was proving resilient to pressures such as the end of lockdown restrictions and increases in the cost of living.
- 5.24 The ONS examined hybrid working almost five years after the start of the Covid-19 Pandemic in November 2024²³. It found that hybrid working appears to have increased since the pandemic nationally, with 13% of working adults working from home only; 28% stating that they followed a 'hybrid working' pattern (part travelling to work, and part at home). This has become the new normal for over a quarter of all workers, up from just 9% back in January 2021 (Figure 5.1).

Figure 5.1 Percentage of working adults by working arrangement, Great Britain, 7 January 2021 to 27 October



Source: Opinions and Lifestyle Survey from the Office for National Statistics (November 2024)

Illustration taken from ONS (11th November 2024): *Who are the hybrid workers?*

- 5.25 ONS concluded that hybrid working is here to stay, but for some workers more than others. ONS found that Managers, parents and over 30s were more likely to hybrid work than other employees. Of people surveyed between April 10 and 30 June 2024, 29% of workers aged 30 years and older followed a hybrid working pattern, compared with 19% for those aged 16 to 29 years old²⁴.
- 5.26 Another ONS survey from December 2023 (Business Insights and Conditions Survey) showed that businesses in the 'information and communication' industry had the highest share of hybrid working at 49%, closely followed by the 'professional, scientific and technical activities' industry at 42%. Industries with a low uptake of hybrid working included businesses operating in the 'accommodation and food service activities' industry and, more relevant for this ELR Update, manufacturing, construction and transportation

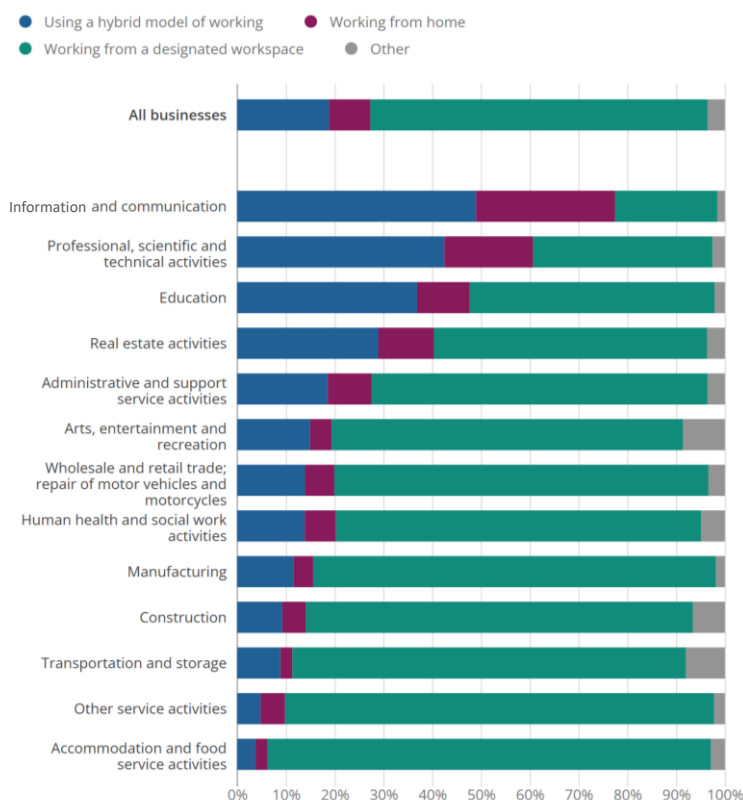
²³

<https://www.ons.gov.uk/employmentandlabourmarket/peopleinwork/employmentandemployeetypes/articles/whoarethehybridworkers/2024-11-11>

²⁴ Ibid

and storage (Figure 5.2).

Figure 5.2 Work location as a percentage of businesses not permanently stopped trading, broken down by industry (2023)



Source: Business Insights and Conditions Survey from ONS from 1 December 2023 to 31 December 2023

Illustration taken from ONS (11th November 2024): *Who are the hybrid workers?*

- 5.27 Many commentators are therefore suggesting that there will be a permanent shift towards home working and the greater flexibility this affords people, with the need for office space in particular falling significantly.
- 5.28 Whilst in our view it is quite likely that there will be some long-term shift in working patterns because of the pandemic, at the time of writing (September 2025) it is still too soon to say precisely how this will impact upon employment floorspace requirements. We therefore propose to retain the aforementioned job densities, particularly as the HCA work already factors in an element of home working / hot desking into the calculations. That said, we have explored the potential impacts of any future need for Covid/health related measures in the sensitivity testing at the end of this chapter.
- 5.29 An adjustment has also been made to reflect the fact that a proportion of employment floorspace will always be vacant. Many sources are now suggesting that a figure of around 7.5%²⁵ / 8% should be used to calculate the normal, or equilibrium vacancy rate. However, CoStar data indicates that as of 2024 very little office and industrial units are available in Mansfield with vacancy rates equalling 2.26% and 2.86% across office and industrial stock. These current levels of vacancy are one of the lowest rates seen in recent years, with the exception of 2023 which saw levels reduce to 1.87% for office and is below the 10-year average of 4.5%. Similarly, vacancy levels across industrial premises have historically been

²⁵ Welsh Government (August 2015): Practice Guidance – Building an Economic Development Evidence Base to Support a Local Development Plan

below 3% since 2014, with 2024 the highest vacancy rate since 2020. Nevertheless, the existing rate is still relatively low. Therefore, it is sensible to apply a degree of flexibility to allow for market fluctuations. Based on this data and discussions with local agents we have applied an 8% adjustment to the modelling as this represents a robust benchmark for an appropriate level of available floorspace going forward.

5.30 Where a reduction in jobs is forecast (e.g. for manufacturing), the associated amount of negative floorspace has been halved (in line with common methodological practice amongst ELRs undertaken elsewhere across the country), to reflect the fact that job decline at a particular company does not automatically translate into a comparable loss of floorspace, at least not in the short-medium term.

5.31 The resultant floorspace estimates are provided in Table 5.4. It indicates that there could be an overall net gain of office/industrial floorspace in Mansfield District of **61,412 sqm between 2023 and 2043**. This is driven by an increased demand for office, B8 and particularly light industrial, with a modest growth in demand for B2 general industrial floorspace.

Table 5.4 Forecast Net Floorspace Change (sqm) in Mansfield 2023-2043: Experian Baseline

	2023	2043	Net Requirement*
Office	76,010	88,764	+13,774
Light Industrial	115,591	140,136	+26,508
B2 General Industrial	190,400	195,027	+4,997
B8 Logistics	218,190	233,127	+16,132
Total Office / Industrial / Distribution	600,191	657,053	+61,412

Source: Experian June 2025 / Lichfields Analysis. Note, sums do not always add due to rounding.

*Factoring in an 8% vacancy allowance where the net requirement is positive

**Net requirement halved as the job growth is negative. No vacancy adjustment applied in such instances.

Scenario 2) Regeneration

5.32 An alternative job-based estimate of future needs was previously compiled which was termed the Regeneration Scenario. This was based upon the D2N2 SEP's '*D2N2 – the Spark in the UK's Growth Engine Strategic Economic Plan - 2019-2030*' which had moved away from job creation as a specific target and instead aimed to tackle the productivity gap in order to remain a competitive business location and to deliver long term prosperity.

5.33 To do this, the D2N2 LEP's SEP identified 11 priority sectors that are important to the D2N2 economy for different reasons and will need different interventions in order to effectively contribute to productivity growth. *"Our priory sectors are split into 2 categories, our Science and Innovation Core Sectors and our Opportunity Sectors. These sectors have been identified according to their degree of specialisation, tradeable 'clustering', concentration of employment or prospects for growth as described below."* [page 35]

Figure 5.3 Focus of Support: D2N2 Core and Opportunity Business Sectors by Business Types and Enabling Competencies

	Sector Analysis			Specialism ¹	Cluster ²	Jobs ³	Growth ⁴
Core	Transport Equip. Man.			✓	✓	✓	✓
	Food & Drink Man.			✓	✓	✓	✓
	Life Sciences			✓	✓	✓	✓
Opportunity	Creative & Digital				✓		✓
	Visitor Economy				✓		
	Logistics & ECommerce			✓	✓		✓
	Construction				✓	✓	✓
	Extractive Industries			✓	✓		
	Retail					✓	✓
	Health/Social Care					✓	✓
	Prof./Business Services				✓	✓	

Priority Sectors	Priority Science and Innovation Sectors			Priority Opportunity Sectors						High Employment Sectors	
	Transport Equipment Manufacturing	Food & Drink Manufacturing	Life Sciences	Creative & Digital	Visitor Economy	Logistics & Ecommerce	Construction	Mineral Products	Professional & Business Services	Retail	Health & Social Care
Characteristics	Large, highly specialised, growing & productive. Knowledge assets. Major OEMs	Specialised and forecast to intensify. Employment growth. Average productivity. Knowledge assets	Small but specialised & productive. Growth prospects. Knowledge assets	Rapid growth sector. Not specialised in D2N2. Digital highly productive.	Large employer. Low productivity but potential for growth. Not specialised in D2N2. Cultural assets	Large, specialised, growing. Average productivity but more productive in D2N2 than UK	Large, growing. Future growth. Average productivity & specialisation. Knowledge assets.	Locally specialised. Local supply chains. Low employment. Strategic resource for growth.	Small, but productive and growing. Data analytics assets.	High employment, low productivity. More productive in D2N2 than UK	High employment, low productivity. Large growth predicted
Key Actions	Supply chain support	Provision of high standard premises	Provision of high standard premises	Provision of high standard premises	Raise value of visitor spend	Availability of sites	Technical skills	Transport infrastructure	Provision of high standard premises	Digital skills & connectivity	Digital skills & connectivity
	Skills for digital manufacturing	Export support	Growth investment	Growth investment	Digital skills & connectivity	Technical skills	Digitalisation & MMC	Technical skills	Inward investment	Innovation adoption	Innovation adoption
	Link clusters to world class research	Link clusters to world class research	Link clusters to world class research	Leadership & management	International marketing & connectivity, HS2	Accommodation	HS2 construction	HS2 construction	HS2 connectivity	Town and City Centres	

Cross Sector Priorities	Science and Innovation: Enabling Competencies	Advanced Manufacturing & Engineering			To exploit our competitive advantages, we will work with business, universities and partners to	1. increase productivity through exploitation & adoption of new technologies & processes 2. Support the development and commercialisation of innovative products, goods & services 3. increase industry & research base links to accelerate commercialisation & innovation.
		Digital Technologies & Data				
		Energy & Low-Carbon Technologies Systems Integration				
Business Support Focus	Re-purpose D2N2 Growth Hub and support programmes to focus on productivity improvement across sectors through access to investment, digitalisation, innovation, leadership and management, high growth, exporting, innovation and skills support.					
						'Middle Band' Businesses with productivity around average
						High-Growth & Potential Scale-ups, potential scale-ups, and businesses with ambition to grow Major Manufacturers and other 'Anchor' Businesses Rolls-Royce, Toyota, Bombardier, Boots, Experian etc...

Source: D2N2 (2019): Strategic Economic Plan: The Spark in the UK's Growth Engine, Vision 2030

5:34 There remain considerable opportunities for growth in Mansfield. Discussions with Mansfield's Executive Mayor Andy Abrahams indicated that by 2035, Mansfield aims to contribute to the East Midlands Combined County Authority [EMCCA] Growth Plan by:

- Adding £1.5bn to the Heartlands Economy;
- Having at least 6,000 more people in sustained employment;
- Creating 100 higher level and degree apprenticeship opportunities every year;
- Creating fifty pathways to rewarding, skilled local careers and grow this by five every year;
- Contributing £500M to the Treasury to be invested in stronger public services;

5:35 Mayor Abrahams' view was that there was a significant opportunity for local business to expand their operations with the right investment and core focus.

5:36 For example, although located at the £100m innovation and technology park site on Lowmoor Road in nearby Sutton in Ashfield rather than Mansfield District, the Automated Distribution and Manufacturing Centre [ADMC] will be an international centre of excellence, providing access to the latest technologies and best practice in automated distribution. The Mayor considered that the proximity of Mansfield to the ADCM presented

considerable wider opportunities for the area going forward, as part of a regional/national centre of excellence for automation and distribution

5.37 Taking this into account, and following new discussions with MDC's Economic Development Officers who agreed that the previous approach still broadly aligned with the Council's economic growth aspirations, the relevant Experian sectors were again matched in line with the 3 core sectors and 8 Opportunity Sectors over the period 2023-2043.

5.38 This resulted in a net job growth of 5,758 in Mansfield District, over and above the +4,500 job growth in the Experian June 2025 baseline as follows:

Table 5.5 D2N2 Target Growth Sectors and SIC2 sectors

	D2N2 SEP Target Growth Sectors	Approximate Comparable Standard Industrial Classifications (Comparable Growth Rates 2023-2043 in Brackets)
CORE SECTORS	Transport Equipment Manufacturing	- Transport Equipment Manufacturing (Mansfield 0% / East Midlands +6.6% / UK +2.0%) - Machinery & Equipment Manufacturing (Mansfield 0% / East Midlands -19.1% / UK -23.3%)
	Food and Drink Manufacturing	Food, Drink & Tobacco Manufacturing (Mansfield 0% / East Midlands -5.2% / UK -7.4%)
	Life Sciences	Manufacture of Pharmaceutical Products (Mansfield 0% / East Midlands +4.1% / UK +6.3%)
OPPORTUNITY SECTORS	Creative & Digital	- Computing and Electronic Products Manufacture (Mansfield 0% / East Midlands -12.9% / UK -13.1%) - Computing and Information Services (Mansfield +16.7% / East Midlands +23.8% / UK +19.4%) - Media Activities (Mansfield 0% / East Midlands +9.6% / UK +18.3%) - Printing and Recording Media Manufacture (Mansfield -16.7% East Midlands -23.9% / UK -25.1%) - Telecoms (Mansfield 0% / East Midlands +7.5% / UK +3.0%)
	Visitor Economy	- Accommodation and Food Services (Mansfield +20.0% / East Midlands +12.0% / UK +18.2%) - Recreation (Mansfield -7.1% / East Midlands -6.5% / UK +14.6%)
	Logistics & eCommerce	- Land Transport, Storage & Post (Mansfield 0% / East Midlands +24.1% / UK +17.6%) - Wholesale (Mansfield +10.0% / East Midlands +7.2% / UK +4.0%)
	Construction	- Civil Engineering (Mansfield 0% / East Midlands +10.9% / UK 11.3%) - Construction of Buildings (Mansfield +22.2% / East Midlands +8.3% / UK +11.5%) - Specialised Construction Activities (Mansfield +21.7% / East Midlands +12.9% / UK +16.3%)
	Mineral Products (Extractive Industries)	Extraction and Mining (Mansfield 0% / East Midlands +11.2% / UK -4.9%)
	Professional and Business Services	- Administrative and Support Services (Mansfield -10.4% / East Midlands +1.9% / UK +14.4%) - Finance (Mansfield +16.7% / East Midlands +14.5% / UK +17.2%) - Insurance & Pensions (Mansfield 0% / East Midlands

		+14.5% / UK +17.2%) • Professional Services (Mansfield +21.1% / East Midlands +24.9% / UK +30.4%) • Real Estate (Mansfield +42.9% / East Midlands +42.9% / UK +26.6%)
	Retail	• Retail (Mansfield +4.2% / East Midlands +8.2% / UK 0.3%)
	Health and Social Care	• Health (Mansfield +27.3% / East Midlands +39.4% / UK +31.3%) • Residential Care and Social Work (Mansfield +20.5% / East Midlands +27.0% / UK +19.8%)

Source: Lichfields Analysis / MDC EDO / D2N2 SEP

5.39 The Table shows the percentage growth between 2023-43 for the East Midlands and the UK as a whole. We have applied the highest growth rate to the 3 Core Growth Sectors, and whichever is the higher of the District growth rate and the lowest of either the EM or UK figure for the Opportunity Sectors.

5.40 The adjustments to the Experian forecasts outlined above result in an increase in E/B-Class jobs in Mansfield of 2,285 (406 higher than the baseline). Table 5.6 summarises the forecast job growth in the Regeneration Scenario.

Table 5.6 Regeneration workforce job change in Mansfield District 2023-43

	Office*	Light Industrial**	B2 General Industrial***	B8 Distribution****	Total Office /Industrial/ Distribution Jobs	Other Jobs	Jobs in All Sectors
Mansfield	+1,238	+522	+148	+376	+2,285	+3,474	+5,758

Source: Experian / Lichfields' Analysis

* includes a proportion of public sector employment and administration & support services

** includes some manufacturing, vehicle repair and some construction activities

*** includes manufacturing and some construction/utilities

****includes elements of transport & communications sectors

5.41 These employment forecasts were then converted to floorspace requirements in the same manner as the Experian baseline forecast. The resulting forecasts are more optimistic in terms of office and general industrial job growth and particularly warehousing growth. These are set out in Table 5.7.

Table 5.7 Regeneration jobs based (net) employment space requirements in Mansfield District 2023-2043

	2023	2043	Net Requirement*
Office	76,010	91,484	+16,712
Light Industrial	115,591	140,136	+26,508
B2 General Industrial	190,400	195,744	+5,771
B8 Logistics	218,190	245,260	+29,235
Total Office / Industrial / Distribution	600,191	672,623	+78,227

Source: Experian June 2025 / Lichfields Analysis. Note, sums do not always add due to rounding.

*Factoring in an 8% vacancy allowance where the net requirement is positive

**Net requirement halved as the job growth is negative. No vacancy adjustment applied in such instances

Scenario 3) Labour Supply

5.42 It is also important to consider how many jobs, and hence how much employment space, would be necessary to broadly align with the forecast growth of the resident workforce in

Mansfield District. In contrast to the other approaches, this scenario focuses on the future supply of labour rather than the demand for labour. It estimates the number of new jobs that would be needed to align with the future working-age population, and how much employment space would be needed to accommodate these jobs.

- 5.43 This Scenario uses data provided to Lichfields by Justin Gardener Consulting [JGC] from the Council's Housing Needs Study [HNS] 2025. The HNS report studied the overall housing need set against the NPPF24 and the PPG – specifically the revised Standard Method for assessing housing need [SM3]. This indicates a need for **495 dwellings per annum** [dpa], based on taking 0.8% of the current stock (51,262 = 410) and an uplift for affordability of 21%.
- 5.44 The HNS took the housing need number and used demographic data (including ONS mid-year population estimates to 2023 and 2021 Census data) to calculate a bespoke population and household projection to look at the possible demographic implications of delivery of this number of homes each year from 2023 to 2043 (the end of the plan period).
- 5.45 Overall, the HNS projected that if the 495 dpa dwelling delivery were achieved over the 20 years 2023 to 2043, the District's population could increase to 126,887 residents (+ 14,796 people over the 20-year period, a 13% increase). According to JGC, this would result in a notable increase in the working-age population (16-64) of between 6,124 and 8,425, depending on whether the economic activity rates were kept constant (6,124) or gradually changed over time to reflect the Office for Budget Responsibility [OBR] – July 2018 (Fiscal Sustainability Report) (8,425).
- 5.46 JGC then converted the labour force into jobs by applying assumptions regarding commuting patterns, double jobbing and unemployment rates over time. The output of this exercise is six different job growth scenarios for the SM3 housing target, as summarised in Table 5.8:

Table 5.8 Jobs supported by demographic projections (2023-43) – Mansfield – SM3

		Total change in economically active	Allowance for double jobbing	Allowance for net commuting (= jobs supported)
OBR EAR	2021 commuting	8,425	8,803	7,256
OBR EAR	2011 commuting	8,425	8,803	7,467
OBR EAR	1:1 commuting	8,425	8,803	8,803
EAR No Change	2021 commuting	6,124	6,400	5,275
EAR No Change	2011 commuting	6,124	6,400	5,428
EAR No Change	1:1 commuting	6,124	6,400	6,400

Source: JGC (2025): Mansfield Housing Needs Study, Figure 24

- 5.47 This indicates that based on JGC's approach, the delivery of 495 dpa over 20 years could see a net increase in jobs of **between 5,275 and 8,803** depending on the assumptions applied concerning economic activity rates and net commuting patterns.
- 5.48 Lichfields has modelled the employment growth that might be expected to be sustained under a series of demographic projections aligned with the Government's standard methodology for calculating housing need, based on the upper and lower end of the job growth scale projected by JGC as follows:
- 1 SM3 (495 dpa) OBR EAR / 1:1 commuting: +8,803 net job growth 2023-2043;
 - 2 SM3 (495 dpa) EAR No Change / 2021 Commuting: +5,275 net job growth 2023-2043;

- 5.49 To translate this job growth into employment floorspace requirements, similar assumptions concerning vacancy rates and employment densities as per the Experian Baseline Scenario 1 forecasting work were applied to the job projections. It has been assumed that the projected employment split of office/ industrial and B8 jobs will mirror the Experian June 2025 projections in 2023 and 2043.

Table 5.9 Forecast Employment Change in Mansfield District 2023-2043 – Total Workforce Jobs

	Office	Light Industrial	B2 General Industrial	B8 Warehousing	Total Office / Industrial / Distribution Jobs	Other Jobs	Jobs in All Sectors
SM3 High Job Growth	+1,630	+778	+594	+486	+3,488	+5,315	+8,803
SM3 Low Job Growth	+1,130	+568	+212	+258	+2,168	+3,107	+5,275

Source: Source: Experian June 2025 / Lichfields Analysis. Note, sums do not always add due to rounding errors. Factoring in an 8% vacancy allowance where the net requirement is positive

- 5.50 Under these two upper and lower scenarios, addressing the future employment requirements of local residents of working age associated with the delivery of 495 dpa would result in a net requirement of between 72,389 sqm to 122,359 sqm of employment floorspace between 2023 and 2043 in Mansfield District depending on the assumptions regarding economically activity rates and commuting patterns. These results are presented in Table 5.10 and Table 5.11:

Table 5.10 Forecast Net Floorspace Change (sqm) in Mansfield 2023-2043: Labour Supply 495 dpa SM3 **High** Job Growth

	2023	2043	Net Requirement*
Office	76,010	96,387	+22,008
Light Industrial	115,591	152,172	+39,507
B2 General Industrial	190,400	211,777	+23,088
B8 Logistics	+218,190	+253,150	+37,757
Total Office / Industrial / Distribution	+600,191	+713,487	+122,359

Source: Source: Experian June 2025 / Lichfields Analysis. Note, sums do not always add due to rounding.

*Factoring in an 8% vacancy allowance where the net requirement is positive

Table 5.11 Forecast Net Floorspace Change (sqm) in Mansfield 2023-2043: Labour Supply 495 dpa SM3 **Low** Job Growth

	2023	2043	Net Requirement*
Office	76,010	90,137	+15,257
Light Industrial	115,591	142,303	+28,849
B2 General Industrial	190,400	198,044	+8,255
B8 Logistics	218,190	236,734	+20,027
Total Office / Industrial / Distribution	600,191	667,217	+72,389

Source: Source: Experian June 2025 / Lichfields Analysis. Note, sums do not always add due to rounding.

*Factoring in an 8% vacancy allowance where the net requirement is positive

Scenario 4) Past Trends

- 5.51 Because they reflect market demand and actual development patterns on the ground, in some situations long term completion rates of employment floorspace can provide a robust basis for informing future land needs, particularly where land supply or demand has not

been unduly constrained historically. However, the future demand picture may not necessarily reflect past trends and some adjustments may be needed.

Scenario 4a) Past Delivery

5-52 Monitoring data on past completions and losses was provided by the Council between 2011/12 and 2023/24, which is when the Council's most recent Employment Monitoring Report [EMR] was published. This covers 13 years of completions and losses data, with MDC Officers and earlier EMRs filling the gaps where necessary, as summarised in Section 4.0. Over the 13-year period 2011/12-2023/24, gross completions for office floorspace in Mansfield District amounted to 11,002 sqm, at an annual average of 846 sqm gross, whilst industrial land completions totalled 9.10 ha, or 0.70 ha per annum.

5-53 Removing losses over the same time period, the net completions figures came to -13,614 sqm for office (-1,047 sqm annually) and 7.08 ha (0.54 ha per annum) for industrial / warehousing uses. These figures, broken down by individual Use Class, are summarised in Table 5.12.

Table 5.12 Mansfield District Annual Average Take up / Losses of Employment Floorspace / Land, 2011/12-2023/24 (sqm / ha)

	Annual Gross Completions*	Annual Losses to alternative non B-Class uses	Annual Net Completions
E(g) (i) Office / E(g) (ii) R&D	846 sqm	-1,894	-1,047
E(g) (iii) Light Industrial	0.20 ha	-0.05	+0.155
B2 General Industrial	0.17 ha	-0.07	+0.109
B8 Warehousing	0.33 ha	-0.03	+0.281
Total E(g)(iii) / B2 / B8	0.70 ha	-0.16	+0.545

Source: MDC Employment Monitoring Reports / MDC Officers (2025) *Note: where MDC data only provided figures for 'Mixed industrial', this was redistributed across light industrial, B2 and B8 uses on a pro-rata basis

5-54 For the purposes of this scenario, we have trended forward this net annual figure over the 20-year plan period from 2023 to 2043. The data suggests that if past trends were replicated in future, then trending forward an annual requirement of 846 sqm of office floorspace would result in a gross requirement of +16,925 sqm, falling to -20,495 sqm if the substantial losses are factored in. As for industrial / warehousing land, a similar approach would result in a gross land requirement of +14.0 ha, falling to 10.9 ha net.

Table 5.13 Forecast Floorspace / Land Change (sqm / ha) in Mansfield 2025-2043: Past Development Trends

	Gross Requirement	Net Requirement
Total Office	+16,925 sqm	-20,945 sqm
Light Industrial	+4.02 ha	3.09 ha
B2 General Industrial	+3.33 ha	2.18 ha
B8 Logistics	+6.66 ha	5.62 ha
Total Industrial / Distribution	+14.00 ha	+10.90 ha

Source: MDC / Lichfields Analysis. Note, sums do not always add due to rounding.

5-55 This approach assumes that past trends of development would continue unchanged, which may not fully reflect the future trajectory of the local economy. The Past Trends scenario produces a net requirement substantially below all of the econometric models discussed above. These are, however, broadly in line with the net requirement of -20,155 sqm for

office floorspace, and +11.47 ha for industrial / warehousing land under the same scenario in the 2021 ELNS (albeit over a slightly different assessment period).

Scenario 4b) Past Net Absorption

- 5.56 An alternative model of past delivery can be derived using CoStar's net absorption data. This represents a measure of total space occupied, less the total space vacated over a given period of time²⁶.
- 5.57 Across the same period as the past development trends discussed above (13 years 2012-2024), CoStar recorded a positive net absorption rate for office space of 1,313 sqm per annum. In terms of industrial space, CoStar recorded an annual increase of 3,993 sqm, just under 1 ha.

Table 5.14 Mansfield District Net Absorption Rates, 2011/12-2023/24 (sqm / ha)

	Annual Net Absorption	20-year Projection	
		Floorspace (sqm)	Land (ha)*
E(g) (i) Office / E(g) (ii) R&D	1,313	26,263	n/a
Total E(g)(iii) / B2 / B8	3,993	79,858	19.96

Source: CoStar Summer 2025 / Lichfields Analysis. *40% plot ratio applied to translate floorspace to land

- 5.58 One view of future growth in Mansfield could therefore assume that these past trends will carry on into the future and as presented above, these would imply a positive net requirement of 26,263 sq.m of office space and 79,858 sqm / 19.96 ha of industrial space over the 20-year Plan period.

Estimating the Net Land Requirement

- 5.59 The next step involves translating floorspace into land requirements for industrial and warehousing uses. Land requirements have been calculated by applying appropriate plot ratio assumptions to the floorspace estimates:
- **Industrial/Warehousing:** a plot ratio of 40% was applied, so that a 1 ha site would be needed to accommodate 4,000 sqm of employment floorspace for all of the main industrial uses.
- 5.60 The resulting net land requirements for the labour demand and labour supply scenarios are set out in Table 5.15. The office net floorspace requirements range from a low of -20,945 sqm under the Past Trends scenario, up to +26,263 sqm with the Past Net absorption Trend. As for the industrial / warehousing land projections, these range from +10.90 ha (again, under the past trends scenario) up to +25.09 ha for the SM3 High Job growth scenario 3a. When compared to the (broadly) equivalent scenarios in Table 8.26 of 2021 ELNS for Mansfield District, it is apparent that the figures are very similar for the past delivery levels, moderately higher for the updated labour demand scenarios and very substantially higher for the two new labour supply scenarios, based as they are on a step change in housing delivery under SM3 with the substantial net increase in population that would entail.

²⁶ Note: Lease renewals are not factored into net absorption, hence the measure equates to the total floorspace occupied less the total space vacated per annum.

Table 5.15 Mansfield District net land requirements by labour demand and supply led scenarios (ha) 2023-43

Scenario	Offices (sqm)	2021 ELNS	Light Industrial	General Industrial (B2)	Warehousing (B8)	Total Industrial	2021 ELNS
1) Experian June 2025 Baseline	+13,774	+8,915	+6.63	+1.25	+4.03	+11.91	+7.30
2) Regeneration	+16,712	+11,348	+6.63	+1.44	+7.31	+15.38	+10.21
3a) SM3 High Job Growth	+22,008	+7,216	+9.88	+5.77	+9.44	+25.09	+5.23
3b) SM3 Low Job Growth	+15,257	+6,264	+7.21	+2.06	+5.01	+14.28	+4.11
4)a Past Delivery	-20,945	-20,155	+3.09	+2.18	+5.62	+10.90	+11.47
4)b Past Net Absorption Trend	+26,263	n/a	n/a	n/a	n/a	+19.96	n/a

Source: Lichfields Analysis. Note: Numbers may not sum due to rounding.

Flexibility Factor

- 5.61 To estimate the overall requirement of employment space that should be planned for in allocating sites, and to allow some flexibility of provision, it is normal to add an allowance as a safety margin for factors such as delays in some sites coming forward for development.
- 5.62 This margin, or flexibility factor, is a contingency adjustment, providing a modest additional land buffer so that supply is not too tightly matched to estimated demand, and so that shortages of land do not arise if future demand turns out to be greater than the forecasts. Such flexibility is sensible given the uncertainties in the forecasting process and the scope for delays in developing employment space.²⁷
- 5.63 The scale of the margin is a judgement call but tends to be reflective of the challenges in the local market based on past completions, ranging from 2 to 5 years. The former South-East England Planning Partnership Board [SEEPB] guidance on employment land assessments recommended an allowance that is equivalent to the average time for a site to gain planning permission and be developed, typically about two years.
- 5.64 Whilst five years is towards the upper end of the scale when it comes to a flexibility margin, given the success of emerging sectors, ambitious economic aspirations of MDC and the need to be consistent with the approach taken in the 2021 ELNS, we consider that in this instance **it is appropriate to allow for a safety margin equivalent to two years of net past take-up.** A gross figure has been used given the negative office floorspace figure and the very substantial peaks and troughs observed in the Council's data.
- 5.65 **A flexibility factor of 1,693 sqm of office floorspace, 0.31 ha light industrial land, 0.22 ha of B2 general industrial and 0.56 ha of B8 warehousing land has therefore been applied, as set out in Table 5.16.**

²⁷ This safety margin is separate from the consideration of the vacancy rate.

Table 5.16 Mansfield District Flexibility Factor

Uses	Average Annual Take-up	2-year Safety Margin Added (ha)
Office and R&D	846 sqm (gross)	1,693 sqm
Light Industrial	0.155	0.31
General Industrial	0.109	0.22
Warehousing	0.281	0.56
Total	0.545	1.09

Source: MDC / Lichfields' Analysis. Note: numbers may not sum due to rounding

- 5.66 Drawing together the results from each of the economic scenarios, the following table summarises the net land requirements across the Plan period factoring in 2-years of flexibility uplift. For the office floorspace scenarios, they range from -19,252 sqm (Past Development Trends), to +27,956 sqm (Past Net Absorption Trends). As for the industrial / B8 net requirements including flexibility, these range from +11.99 ha (Past development Trends) to +26.18 ha (SM3 High Job Growth).

Table 5.17 Net Land Requirements for Mansfield District (including flexibility factor) for 2023 to 2043 (ha)

		Offices / R&D (sqm)	Light Industrial (ha)	General Industrial (ha)	Warehousing (ha)	Total (ha)
1) Experian June 2025 Baseline	Net	13,774	6.63	1.25	4.03	11.91
	+ Flexibility Factor	15,467	6.94	1.47	4.60	13.00
2) Regeneration	Net	16,712	6.63	1.44	7.31	15.38
	+ Flexibility Factor	18,405	6.94	1.66	7.87	16.47
3a) SM3 High Job Growth	Net	22,008	9.88	5.77	9.44	25.09
	+ Flexibility Factor	23,701	10.19	5.99	10.00	26.18
3b) SM3 Low Job Growth	Net	15,257	7.21	2.06	5.01	14.28
	+ Flexibility Factor	16,950	7.52	2.28	5.57	15.37
4)a Past Delivery	Net	-20,945	3.09	2.18	5.62	10.90
	+ Flexibility Factor	-19,252	3.40	2.40	6.19	11.99
4)b Past Net Absorption Trend	Net	26,263	n/a	n/a	n/a	19.96
	+ Flexibility Factor	27,956	n/a	n/a	n/a	21.05

Source: Lichfields analysis

Convert Net to Gross Floorspace Requirements

- 5.67 While the net employment space requirements presented above represent the minimum recommended quantum of employment space to plan for in Mansfield District over the plan period, the Council will need to take a view on the extent to which additional space should be planned for over and above the net requirements, in order to allow for replacement of ongoing losses of employment space during its Local Plan period.
- 5.68 Determining an appropriate scale of re-provision is a judgement for MDC to make to align with its particular economic growth and strategic policy considerations. Nevertheless, there are a number of data sources that can be scrutinised to provide some guidance as to what an appropriate level of re-provision might be. These include identifying how much employment land is in the pipeline to be lost to alternative uses (from reviewing extant planning applications and Strategic Housing Land Availability Assessments [SHLAAs]); reviewing past trends and assessing whether this is likely to continue for the foreseeable future; and a 'rule of thumb' approach looking at the size of the local property market and

the extent to which there needs to be an element of replacement of a certain proportion of the current commercial/industrial stock to ensure that portfolio does not become increasingly obsolete.

5.69 The scale of loss replacement for Mansfield, alongside the other 7 Nottinghamshire Inner / Outer HMA districts, was assessed in detail in Appendix 1 of the 2021 ELNS. This concluded the following:

- “Mansfield: Past trends industrial losses appear low based on the size of the local economy (4,680 sqm pa based on 1% replacement, compared to 794 sqm based on past losses) and the fact that 3.89 ha of existing industrial land already has extant permission to be developed for alternative uses as of 31st March 2019. Conversely, the past trend of office losses looks to be on the high side which could suggest that a lower loss replacement could be appropriate. As of 2018/19, the amount of committed employment floorspace approved for change of use was 1,302 sqm of office and 3.89 ha of industrial land.
- It is recommended that to bring this back into balance, the mid-point of the past trends losses of 2,947 sqm and the 1% replacement of stock (5,432 sqm) is projected forward over the plan period. This equates to 4,189.5 sqm per annum (**split 1,452.4 sqm for office and 2,737.1 sqm for industrial / distribution**) and compares to the 16,862 sqm that is already in the pipeline to be lost from the employment land portfolio”. [ELNS 2021, pages 175-176]

5.70 We have updated this analysis as follows for Mansfield District.

Pipeline Losses

5.71 MDC Planning Officers provided details of potential losses of existing employment sites as of August 2025, all of which have extant planning permission for potential changes of use. These are summarised in Table 5.18 and suggest that up to **1,886 sqm** of existing employment floorspace could be lost across seven sites:

Table 5.18 Net Land / Floorspace with extant permission for Alternative Uses (ha)

Planning Reference	Site Name	Allocation?	Under Construction?	Employment Use (Current)	Floorspace to be lost (sqm)
2023/0427/COU	17 St John Street	N	N	E(g)(i)	-162
2022/0518/COU	Former ATS Eastern Ltd, Great Central Road	N	N	B8	-138
2024/0706/PNS COU	16 Regent Stret	N	Y	E(g)(iii)	-350
2021/0537/COU	Bromley Croft, Unit 1 Oxclose Lane	N	Y	E(g)(i)	-530
2024/0438/PNS COU	Community Point, 141 Newgate Lane	N	N	E(g)(i)	-9
2024/0255/COU	Delta House Kestral Road	N	N	E(g)(i)	-539
2025/0154/COU	Sycamore House, Sycamore Grove	N	N	B8	-158
TOTAL					-1,886

Source: MDC Officers August 2025

Past Trends

- 5.72 As summarised in detail in Section 4.0, MDC provided data stretching back to 2011/12. As can be seen in Table 4.5, the District lost 24,616 sqm of office floorspace over the 13-year period, at an average of -1,894 sqm per annum, whilst for industrial / warehousing land, some 2.02 ha was lost in total, averaging 0.155 ha per annum. The latter figure was split fairly evenly between light industrial and general industrial land, with comparatively little B8 warehousing land lost.

Table 5.19 Annual Net Office / Industrial Completion Rates for Mansfield District 2011/12-2023/24

	Average Annual Office Floorspace Losses (sqm)	Average Annual Industrial / Distribution Losses (ha)
Mansfield	-1,894 sqm	-0.155 ha

Source: MDC / Lichfields' Analysis

Churn

- 5.73 The aforementioned past trends data needs to be placed into context given the size of the respective economy, with an analysis needed as to whether the past losses generally reflect the size of each district's economy, and whether this should be adjusted to allow for a degree of refurbishment to prevent the portfolio becoming increasingly unattractive to the market.
- 5.74 An alternative approach is therefore to analyse the rate of 'churn', which would be equivalent to a proportion of Mansfield's existing stock per annum. A number of other ELRs have used a replacement figure of around 1% per annum²⁸, which would be the equivalent of the two HMA's entire stock being replaced over a period of 100 years. This has been acknowledged as a valid alternative approach (to adjusting for anticipated future losses) when translating net employment land needs into a gross planning requirement. A 0.5% replacement level would be the equivalent of the entire stock being replaced over 200 years. To put this into context, a widely used rule of thumb in the development industry suggests that high bay logistics units often have a much shorter shelf life of just 30-35 years before they become obsolete to modern distribution occupiers and require substantial refurbishment if not demolition and rebuild.
- 5.75 Other ELR studies²⁹ have noted that approximately 20% of historic completions have been achieved through (former) B-Use Class redevelopment (i.e. the re-use of formerly B-Use Class employment sites), with the remainder requiring new sites. This suggests that there will likely be a requirement for a high proportion of replacement activity on new sites to deliver new employment land supply to meet modern occupier needs.
- 5.76 Table 5.20 compares the rate of replacement needed for Mansfield District's office / industrial stock. It assumes that 0.5% / 1% of the existing commercial / industrial floorspace would be replaced per annum (based on the existing floorspace for each district using the latest Business Rates VOA data for 2023) and netting off a further 20% (assuming that 1 out of 5 sites will be recycled for employment use).

²⁸ See, for example, Lichfield District Council's Employment Land Review 2014 Update and work covering the areas of: The West of England Updated Employment Evidence (Bath & North East Somerset, Bristol, North Somerset and South Gloucestershire) November 2018; Greater Exeter Economic Development Needs Assessment (Devon County, East Devon, Exeter, Mid-Devon, Teignbridge and Dartmoor National Park) March 2017 and Dartmoor National Park Employment Land Review, January 2018.

²⁹ West of England Joint Spatial Plan Area Updated Employment Evidence (2018)

Table 5.20 Mansfield District Replacement Rate Analysis (2023)

	Annual Replacement at 1%	20-year replacement	Annual Replacement at 0.5%	20-year replacement
Office	768	15,360	384	7,680
Industrial & Warehousing	4,712	94,240	2,356	47,120
Total	5,480	109,600	2,740	54,800

Source: Lichfields analysis/VOA Business Floorspace (2024): Non-domestic Rating: Business Floorspace, 2023 (Tables FS3.1 and FS4.1)

- 5.77 The Table indicates that based on a 1% rate of replacement, there would be a need for 15,360 sqm of office floorspace to be replaced over the 20-year plan period, and 94,240 sqm of industrial floorspace, falling to 7680 sqm of office floorspace / 47,120 sqm of industrial floorspace if the replacement rate is reduced to 0.5% annually.

Conclusions on the Scale of Loss Replacement

- 5.78 As noted above, the 2021 ELNS concluded that Mansfield District should seek to replace 1,452.4 sqm of office and 2,737.1 sqm of industrial floorspace per annum.
- 5.79 This updated analysis has revisited the assessment based on a review of pipeline losses, past trends and churn. Table 5.21 indicates that past trends industrial losses appear very low based on the size of the local economy (4,712 sqm p.a. based on 1% replacement, compared to 676 sqm based on past losses) even though only 646 sqm of existing industrial land has extant permission to be developed for alternative uses as of August 2025 (which also appears very low). Conversely, the past trend of office losses looks to be on the high side which could suggest that a lower loss replacement could be appropriate.

Table 5.21 Mansfield District Loss Replacement Summary

	Pipeline Losses	Past Trends	Churn Analysis	Churn Analysis
	Total committed losses as of August 2025	Average Annual Losses	Annual Replacement at 1%	Annual Replacement at 0.5%
Office	1,240 sqm	1,894 sqm	768 sqm	384 sqm
Industrial & Warehousing	646 sqm	676 sqm*	4,712 sqm	2,356 sqm
Total	1,886 sqm	2,515 sqm	5,480 sqm	2,740 sqm

Source: Lichfields analysis/VOA Business Floorspace (2024): Non-domestic Rating: Business Floorspace, 2023 (Tables FS3.1 and FS4.1) / MDC data *Based on a 40% plot ratio

- 5.80 In line with the 2021 ELNS approach for Mansfield District, it is recommended that to bring this back into balance, the mid-point of the past trends losses of 2,515 sqm and the 1% replacement of stock (5,480 sqm) is projected forward over the plan period. This equates to **3,998 sqm per annum** (split 1,359 sqm for office and 2,639 sqm for industrial / distribution, derived on the basis of taking the average split across the four loss replacement scenarios in the Table above).
- 5.81 Over 20 years, this would see the replacement of **27,180 sqm of office floorspace and 52,780 sqm / 13.195 ha of industrial and warehousing space**.

Future Gross Employment Land Requirements for Mansfield District

5.82 In summary, the demand-led range of total gross land requirements to 2043, factoring in a 2-year margin of choice and loss replacement, results in the following demand projections for Mansfield (set out in full in Table 5.22).

5.83 The scenarios range from a low of 7,928 sqm office / 25.18 ha industrial (Scenario 4 Past Take Up) to the Scenario 3a SM3 High Job Growth figures of 50,881 sqm / 39.37 ha:

- 2 **Econometric demand-led projections: Office: 42,647 sqm–45,585 sqm; Industrial / Warehousing: 26.19 ha–29.66 ha;**
- 3 **Labour Supply projections: Office: 44,130 sqm–50,881 sqm; Industrial / Warehousing: 28.57 ha–39.37 ha; and,**
- 4 **Past Development Trends: Office: 7,928 sqm–55,136 sqm; Industrial / Warehousing: 25.18 ha–34.24 ha.**

Table 5.22 Mansfield District Gross Employment Land Requirements 2023-2043

		Offices / R&D (sqm)	Light Industrial (ha)	General Industrial (ha)	Warehousing (ha)	Total Industrial / Warehousing (ha)
1) Experian June 2025 Baseline	Net	13,774	6.63	1.25	4.03	11.91
	+ Flexibility Factor	15,467	6.94	1.47	4.60	13.00
	+ Loss Replacement	42,647	9.95	7.94	8.31	26.19
2) Regeneration	Net	16,712	6.63	1.44	7.31	15.38
	+ Flexibility Factor	18,405	6.94	1.66	7.87	16.47
	+ Loss Replacement	45,585	9.95	8.14	11.58	29.66
3a) SM3 High Job Growth	Net	22,008	9.88	5.77	9.44	25.09
	+ Flexibility Factor	23,701	10.19	5.99	10.00	26.18
	+ Loss Replacement	50,881	13.20	12.46	13.71	39.37
3b) SM3 Low Job Growth	Net	15,257	7.21	2.06	5.01	14.28
	+ Flexibility Factor	16,950	7.52	2.28	5.57	15.37
	+ Loss Replacement	44,130	10.53	8.76	9.28	28.57
4)a Past Delivery	Net	-20,945	3.09	2.18	5.62	10.90
	+ Flexibility Factor	-19,252	3.40	2.40	6.19	11.99
	+ Loss Replacement	7,928	6.41	8.87	9.90	25.18
4)b Past Net Absorption Trend	Net	26,263	n/a	n/a	n/a	19.96
	+ Flexibility Factor	27,956	n/a	n/a	n/a	21.05
	+ Loss Replacement	55,136	n/a	n/a	n/a	34.24

Source: Lichfields' analysis

5.84 As can be seen in Table 5.23, in general the office floorspace requirements are of a similar magnitude to the (broadly) comparable scenarios in the previous 2021 ELNS, whilst the

industrial / warehousing land requirements are significantly higher (with the exception of past trends), particularly for the labour supply scenarios (due to the step change in the housing requirement and the likely scale of inward migration this could bring into the area).

Table 5.23 Mansfield District Gross Employment Land Requirements 2023-2043 – Comparison between ELR and ELNS

2025 ELR Update			2021 ELNS		
	Offices / R&D (sqm)	Total Industrial / Warehousing (ha)	Nearest Comparable scenarios	Offices / R&D (sqm)	Total Industrial / Warehousing (ha)
1) Experian June 2025 Baseline	42,647	26.19	1) Experian September 2020 Baseline	40,254	22.14
2) Regeneration	45,585	29.66	3) Regeneration	42,686	25.04
3a) SM3 High Job Growth	50,881	39.37	5) Current SM (275 dpa)	38,554	20.07
3b) SM3 Low Job Growth	44,130	28.57	4) 2014-based SNPP	37,603	18.94
4)a Past Delivery	7,928	25.18	6) Past Take Up	11,183	26.31

Source: Lichfields' analysis

Reality Check

- 5.85 Clearly the levels of future demand for employment land projected by the various projections differ. The projections are largely trend-based; in particular, the past take up has been (at least partly) recorded during an unprecedented recession in the commercial market nationally. It is likely that the actual performance of Mansfield's economy and commercial property market will lie somewhere between the labour supply and econometric projections, with the past take up scenarios appearing very low and likely supply constrained.
- 5.86 To provide a clearer steer as to what level of growth Mansfield should be planning for, it is important to apply reality checks.

Replacement of Losses

- 5.87 The scenarios considered in the preceding paragraphs include an allowance for the replacement of losses in excess of past trends, but below the 1% replacement figure. This is considered appropriate, having regard to the scale and nature of historic losses and the lack of large-scale employment losses in the pipeline.

Post Covid Impact on Employment Densities

- 5.88 As set out earlier in this Report, it is accepted that the Covid-19 pandemic has dramatically altered working patterns, with the number of people working from home, either permanently or on a hybrid-working basis, rising significantly since lockdown. Many commentators are suggesting that this represents a permanent shift towards home working and the greater flexibility this affords people, with the need for office space in particular falling significantly. Examples could include the need for social distancing in terms of desk-

spacing and layouts, less sharing of desks, and more communal space. Conversely, the long term impact may actually be to increase densities, with a higher proportion of the workforce working from home, and rotating the use of desk space to minimise the number of people in the office at any given point in time, which may actually have the effect of increasing densities.

- 5.89 The modelling currently assumes that one general office workforce job requires 12.5 sqm of employment floorspace [GEA]. If employment densities were to decrease by 20%, to 15 sqm, then the land requirements would only increase by a maximum of 4,400 sqm (1.1 ha) overall. Conversely, if more people were to work from home but still come into the office a few days a week, perhaps to a smaller office but with a similar number of staff as before, and employment densities actually increased by 20% (to 1 job per 10 sqm), then this would reduce the level of employment land needed by a similar amount.
- 5.90 Either way, our view remains that it is likely that there will be some long-term shift in working patterns as a result of the pandemic, it is still far too soon to say what the scale of that change on home working is likely to be. The sensitivity test demonstrates that there would have to be a fairly profound shift in office employment densities to have a significant impact on the level of employment land needed overall.

6.0 Meeting the Needs of the Modern Economy

Introduction

- 6.1 The ‘modern economy’ forms part of the Government’s drive to achieve a greater quantum of commercial development in high-growth sectors. To achieve this, the NPPF24 now requires LPAs to proactively support and encourage the development of these sectors through the planning system, in both policy-making and decision-making.
- 6.2 In Paragraph 86c, the NPPF24 states that planning policies should:
- “...pay particular regard to facilitating development to meet the needs of a modern economy, including by identifying suitable locations for uses such as laboratories, gigafactories, data centres, digital infrastructure, freight and logistics.”*
- 6.3 Within the supporting NPPF24 consultation guidance and outcome³⁰, paragraph 3 of Chapter 7 defines the four “key industries” of the modern economy:
- Laboratories
 - Gigafactories (battery cell manufacturing plants)
 - Digital infrastructure (including data centres)
 - Freight and logistics
- 6.4 The modern economy is characterised by these four industries and their associated land uses. In terms of employment land implications, ‘digital infrastructure’ is taken to refer to data centres.
- 6.5 This section of the ELRU reviews the development potential for the ‘modern economy’ uses identified within the NPPF24. It considers the existing representation of these modern economy sectors in the District of Mansfield before subsequently reviewing their growth potential within the area and the extent to which their particular location drivers indicate potential for future growth and the associated planning policy implications.
- 6.6 The assessment within this report draws upon Lichfields’ specially designed framework, based on three stages of analysis:
- 1 Define the modern economy;
 - 2 Identify areas of growth potential; and
 - 3 Establish planning and delivery implications.
- 6.7 The modern economy sectors cannot necessarily be analysed using a conventional ‘predict and provide’ approach, or by using forecasts, owing to the often rapidly evolving nature of the need for space for the modern economy. As such, the framework applies a comprehensive approach that is sensitive to the individual attributes of each modern economy sector, acknowledging the synergies between these sectors and the wider local and national economy.

³⁰ MHCLG (2024) Consultation outcome: Proposed reforms to the national planning policy framework and other changes to the planning system. Available at: <https://www.gov.uk/government/consultations/proposed-reforms-to-the-national-planning-policy-framework-and-other-changes-to-the-planning-system/proposed-reforms-to-the-national-planning-policy-framework-and-other-changes-to-the-planning-system>

- 6.8 The framework pays particular attention to the comparative local advantages within individual sectors of the modern economy, recognising that the objective of development in the modern economy is to support the national growth agenda. As such, emphasis should be placed on development that supports modern economy sectors for which Mansfield District demonstrates strong existing supply and demand conditions, in addition to future growth potential.
- 6.9 This section therefore considers the existing representation of these sectors in Mansfield and reviews the extent to which there is potential for future growth within the area. The strategic requirements of planning for most of the modern economy sectors (except for laboratories which are included as a class E research and development use) could be considered to be in addition to the indigenous requirements for employment floorspace and land considered in Section 5.0.
- 6.10 This Section does not provide estimates of floorspace requirements for each of the ‘modern economy’ land uses, but instead provides an initial ‘scoping’ exercise by considering the existing representation of these sectors in Mansfield and reviews the extent to which their particular location drivers indicate potential for future growth and clustering.
- 6.11 **It should be noted that the needs of freight and logistics have already been considered separately in the Icen Report Nottinghamshire Core & Outer HMA Logistics Study 2022 and we have not sought to duplicate or update that analysis here.**

Defining modern economy industries

- 6.12 The modern economy as defined within the NPPF²⁴ relates to land uses rather than defined economic activities. For example, the activities conducted in a laboratory can vary greatly between ‘wet labs’ focusing on life sciences and pharmaceuticals and ‘dry labs’ specialising in computing and robotics.
- 6.13 While a focus on land use is appropriate for planning purposes, it needs to be ‘translated’ to typical industrial definitions to establish the existing footprint and growth potential of the modern economy in a particular area. Official statistics from the ONS and other government sources are primarily based on the 2007 Standard Industrial Classification (SIC 2007) system, and data from these sources are required to gain a deeper picture of prevailing conditions and for analysing industry forecasts.
- 6.14 Table 6.1 presents the SIC 2007 group definitions which are applied throughout this Section. These sectors represent a best-fit to the direct activities associated with the modern economy. It should be noted that no one data source will be able to provide a fully comprehensive view of the existing presence or future growth potential of the modern economy sectors. As such, these SIC definitions are applied to a range of datasets.
- 6.15 It is also important to establish upstream and downstream linkages and interdependencies within the modern economy supply chains. Identifying the presence of these activities is important to understanding the locational factors for modern economy businesses, as clusters do not solely relate to firms within the same sector, but also those within the wider industry supply chains. These supply chains are identified using input-output tables from

the ONS³¹ which show supply and use linkages between the outputs of different industries in the economy.

- 6.16 Within the Lichfields framework, industries that feed into the four modern economy industry groupings are defined as ‘Tier 2’ feeder industries to the modern economy. The Tier 1 sectors are provided in Table 6.1, and the Tier 2 sectors for each modern economy industry are shown in Appendix 1.

Table 6.1 Modern Economy Sectors

Industry	Sector (SIC 3-digit)
Laboratories	72.1: Research and experimental development on natural sciences and engineering
Gigafactories	27.2: Manufacture of batteries and accumulators 29.1: Manufacture of motor vehicles
Digital Infrastructure	63.1: Data processing, hosting and related activities; web portals
Freight	49.2: Freight rail transport 49.4: Freight transport by road and removal services 50.2: Sea and coastal freight water transport 50.4: Inland freight water transport 51.2: Freight air transport and space transport
Logistics	52.1: Warehousing and storage 52.2: Support activities for transportation

Source: Lichfields

Baseline Position

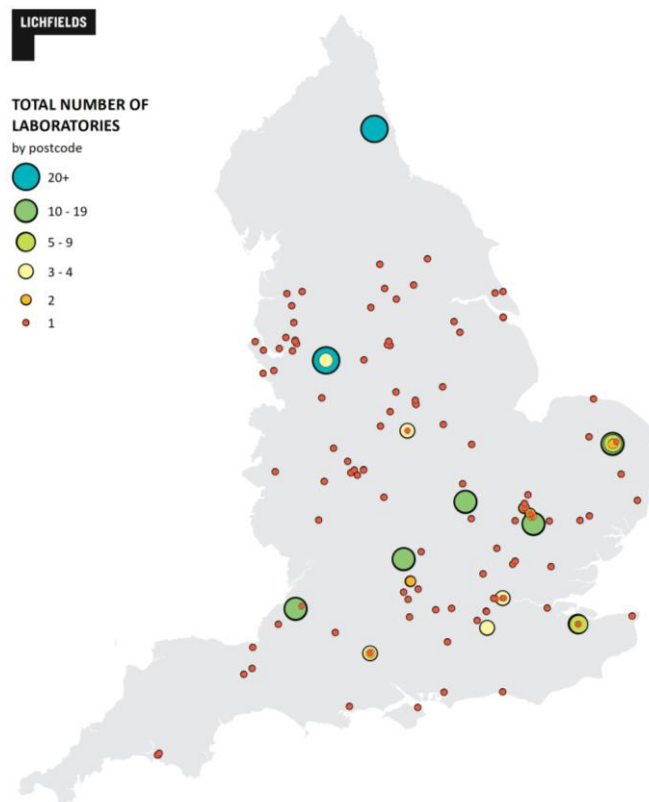
- 6.17 The factors influencing supply of, and demand for, the modern economy industries are not limited in their geographic scale: many factors are UK-wide, if not global. This section considers the key factors influencing demand for the individual modern economy sectors in turn, analyses the existing concentration and distribution of each sector and reveals the spatial interrelationships between them where relevant.
- 6.18 During discussions with key stakeholders, Mansfield was reported as having a significant creative cluster, with one of the largest creative agencies outside of London - Linney Group, based in Mansfield - alongside 400 other small and medium businesses across the broad spectrum of creative and digital sectors. The town has a cluster of successful businesses committed to the development of skills and young people with significant relationships with West Nottinghamshire College, for example the AF Switchgear academy and Glenair training schemes.
- 6.19 Although some of this applies to adjoining Ashfield, stakeholders considered that it was relevant to Mansfield to note that the Further Education Skills agenda growth will make the District more attractive to be invested in going forward. This is particularly relevant to advanced manufacturing, engineering and construction with a good mix of large multi-national organisations such as Glenair and ITP aero, large national organisations such as AF Switchgear, Van Elle through to smaller businesses. These companies provide specialist and advanced services to the defence, aero-space and automotive sectors. Many of the businesses within these sectors also specialise in precision engineering.

³¹ Office for National Statistics (ONS) (2025) UK input-output analytical tables: industry by industry

Laboratories

- 6.20 The laboratories sector can be broadly divided between ‘wet labs’ focusing on medicine, pharmaceuticals, and life sciences and ‘dry labs’ specialising in robotics, computing and related activities. The split of laboratory demand between wet and dry labs is in a state of flux. While London in particular has seen high demand for wet lab space in recent years³², advances in Artificial Intelligence [AI] technology have increased demand for dry lab spaces in the life sciences sector³³. Globally, demand for laboratories in the life sciences sector stems from a growing and ageing population in tandem with rapid technological and scientific advancement.
- 6.21 Figure 6.1 shows the locations of laboratories in England based on VOA rating list records. We note that the VOA list is not exhaustive and may exclude laboratories within the public or education sector, for example at hospitals and universities. This demonstrates the prevalence of the life sciences ‘Golden Triangle’ between Oxford, Cambridge and London. Other clusters are present in and around major university cities including Manchester, Bristol, Norwich and Newcastle and, nearer to Mansfield, Nottingham.

Figure 6.1 Location of laboratories in England



Source: VOA, 2023

- 6.22 There are only two recorded laboratories on the VOA rating list in Mansfield, although there are more facilities in the nearby City of Nottingham (4).

³² MedCity London (2024) London Lab Showcase: MedCity Report July 2024

³³ JLL (11 December 2024) From wet to dry: How AI is shaking up laboratory design. Available at: <https://www.jll.co.uk/en/trends-and-insights/investor/from-wet-to-dry-how-ai-is-shaking-up-laboratory-design>

- 6.23 As defined above, for the purposes of this ELRU, laboratory-related businesses fall within SIC group 72.1: *Research and experimental development on natural sciences and engineering*. Based on this definition, analysis of ONS IDBR (2024) data indicates that there are no Tier 1 laboratory-related businesses in Mansfield.

Gigafactories

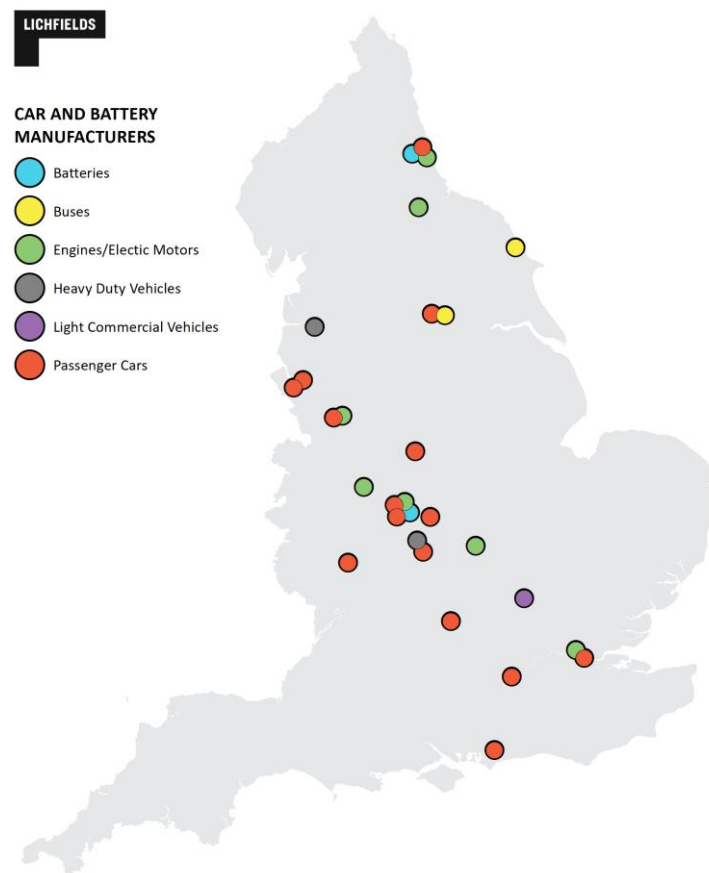
- 6.24 Gigafactories are large-scale manufacturing facilities for the production of batteries for electric vehicles [EVs]. The growth in demand for EVs in the UK has gained pace in recent years as we approach the 2030 phase-out date for new petrol and diesel vehicles³⁴.
- 6.25 Figure 6.2 shows the locations of car and car battery manufacturers in England. At present, the UK has just one operational gigafactory, located in Sunderland and owned by AESC, Nissan's EV battery partner. This facility opened in 2012 to produce batteries for the Nissan LEAF and covers a floor area of 25,000 sqm, with a production capacity of 1.8 GWh per year³⁵. There are three gigafactories due to open in 2025 and 2026, namely an additional AESC plant in Sunderland, Agratas in Somerset, and the UK Battery Innovation Campus in Coventry, taking UK capacity to approximately 66 GWh per annum. The new AESC gigafactory is to be significantly larger than the existing Sunderland site, with a capacity of 15.8 GWh per annum and covering an area of just under 200,000 sq.m.
- 6.26 The Faraday Institution estimates that the UK will require at least six gigafactories by 2030 and a further four by 2040 to meet forecast battery demand of 200GWh per annum³⁶, assuming an average plant capacity of 20 GWh per annum. As the demand for gigafactories is intrinsically related to the demand for EVs, many proposed gigafactories are located in established car manufacturing hubs. However, given the physical scale of gigafactories, this is not always the case: the Tata Group Agratas facility, supplying Jaguar Land Rover [JLR] and covering an area 35% larger than Wembley Stadium, is to be located at the Gravity Smart Campus in Somerset despite the nearest JLR plant being in Birmingham. This demonstrates that the scale and urgency of demand for batteries in the energy transition can spatially decouple gigafactories from car manufacturing plants.

³⁴ Department for Transport (6 January 2025) Written statement to Parliament: Phasing out the sale of new petrol and diesel cars from 2030 and support for zero emission vehicle (ZEV) transition. Available at: <https://www.gov.uk/government/speeches/phasing-out-the-sale-of-new-petrol-and-diesel-cars-from-2030-and-support-for-zero-emission-vehicle-zev-transition> [Accessed 1 April 2025]

³⁵ The Faraday Institution (2024) UK electric vehicle and battery production potential to 2040

³⁶ Ibid

Figure 6.2 Car and battery manufacturers in England (ACEA, 2025)



Source: ACEA, 2025

- 6.27 Analysis of IDBR data indicates that there are no Tier 1 gigafactory-related sectors located in Mansfield.

Digital Infrastructures

- 6.28 As defined above, for the purposes of this study, ‘Tier 1’ digital infrastructure businesses are those within SIC Group 63.1: data processing, hosting and related activities; web portals. As such, these businesses cover a range of activities, with some related to data centres while others are within the wider data processing and management sectors.
- 6.29 Data centres will form a key focus when planning to meet the future digital infrastructure needs of both businesses and consumers. Data centres are physical locations storing computing machines and related hardware³⁷. Increasing digitalisation and demands on cloud storage, coupled with the growing use of AI and other intensive computing processes, has led to a sharp rise in demand for data centres. Globally, data centre capacity is projected to grow by 15% in 2025, yet this will not be sufficient to meet growing demand³⁸.
- 6.30 Digital infrastructure is not dissimilar to conventional infrastructure networks, particularly in that the further data travels, the longer it will take; this is known as latency. As the primary sources of demand for data centres are businesses located in major cities, to

³⁷ AWS (n.d.) What is a Data Centre? Available at: <https://aws.amazon.com/what-is/data-center>

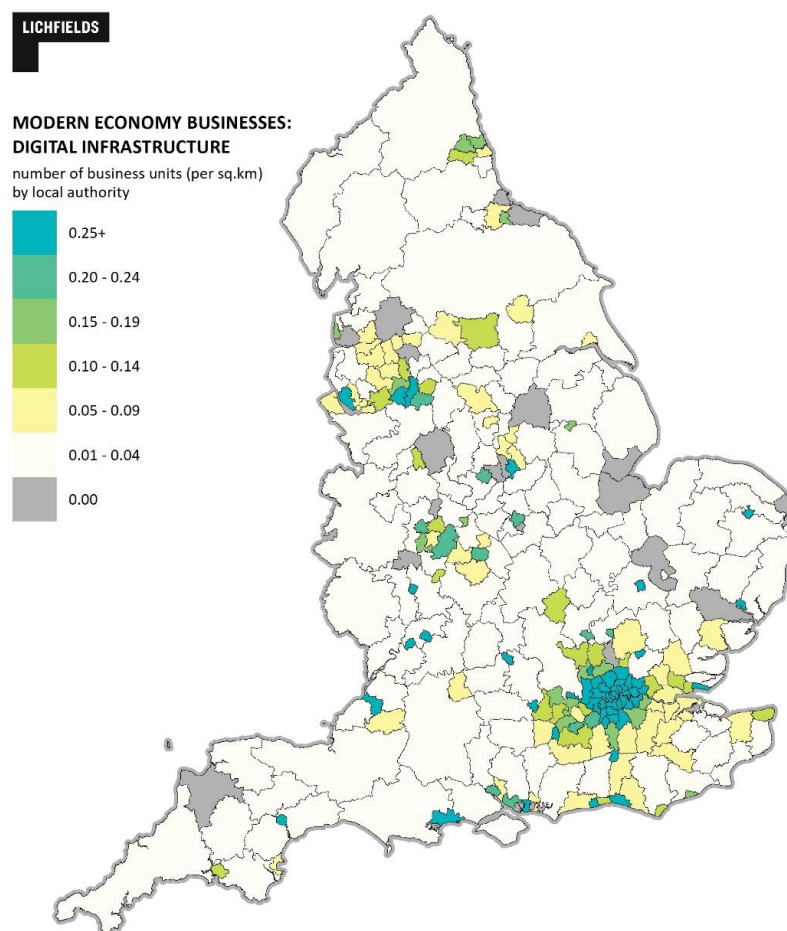
³⁸ JLL (2025) 2025 Global Data Center Outlook. Available at: <https://www.jll.co.uk/en/trends-and-insights/research/data-center-outlook>

minimise latency data centres will cluster within and around these cities; this clustering is also seen within the broader digital infrastructure sector.

6.31 Figure 6.3 illustrates the number of Tier 1 digital infrastructure business units per sq.km by local authority in England, based on data from the ONS. The dominance of London as the primary digital infrastructure hub in the country is apparent, while other clusters are emerging in the Manchester-Liverpool region and the West Midlands. Nottingham City has a strong cluster, with 0.34 digital infrastructure units per sq.km, whilst the Mansfield District has just 0.07 (5 units across 77 sq.km).

6.32 Cloud Service Providers rely on networks of data centres, which are locationally constrained by 'Availability Zones' formed of one or more data centres. Each Availability Zone has its own power supply to reduce the likelihood of simultaneous failure³⁹. This is a further factor influencing the spatial clustering of data centres at present and is particularly prevalent in Slough and East London, which are clearly a considerable distance away from the Mansfield District.

Figure 6.3 Tier 1 digital infrastructure business units per sq.km by local authority, England



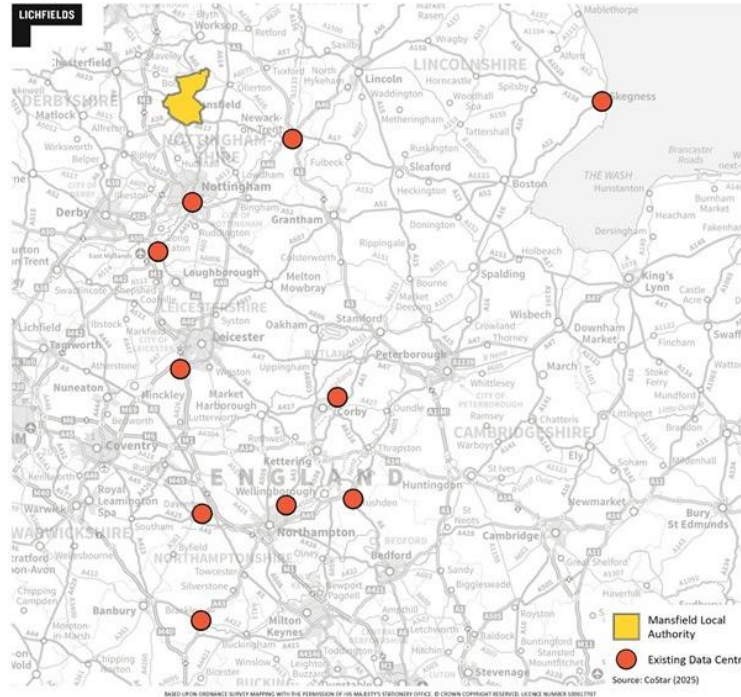
Source: ONS, 2024

6.33 The locations of existing data centres in Nottinghamshire and the wider East Midlands, as of September 2025, are shown in Figure 6.4. It indicates that there are currently no data

³⁹ CloudConstruct (n.d.) What is an availability zone? Available at: <https://cloudconstruct.co.uk/aws/what-is-an-availability-zone/>

centres in the Mansfield District; however, there are two data centres located close by, at Queens Drive in Nottingham and Jessop Close (Timico Data Centre) in Newark.

Figure 6.4 Existing data centres in Nottinghamshire and the wider East Midlands

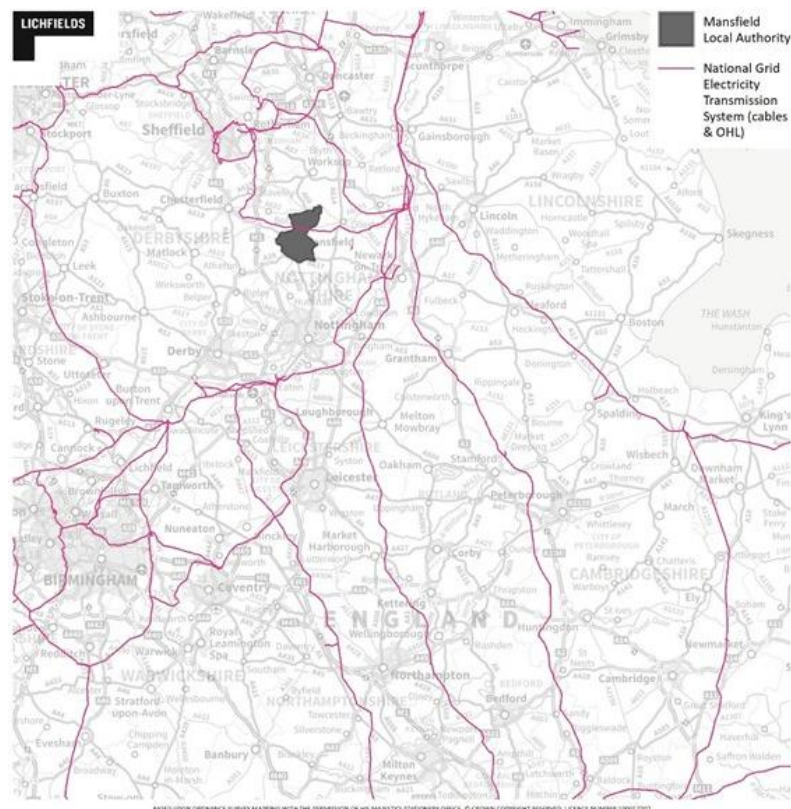


Source: CoStar 2025

6.34

Data centres, and the growing number of ‘hyperscale’ data centres, have significant space and power requirements that influence where demand is realised. The National Grid’s electricity transmission network, shown in Figure 6.5, demonstrates the proximity of Nottinghamshire’s key towns to the network, and particularly along the A46 and to the east and south of Nottinghamshire. One transmission system line passes directly through Mansfield District.

Figure 6.5 Electricity transmission network in Nottinghamshire and the wider East Midlands



Source: National Grid, 2025

Freight and Logistics

- 6.35 Demand for freight and logistics manifests itself in warehousing, storage and distribution centres, in addition to transport hubs and infrastructure. One key source of the growing demand for freight and logistics solutions is of course the rise of e-commerce, in part accelerated by the Covid-19 pandemic lockdowns. As a facilitator to other industries, and an established sector in its own right, the freight and logistics industry is both a growth enabler and a critical growth driver.
- 6.36 In terms of the modern economy, the role of freight and logistics' can be taken to relate to the next generation of warehousing and distribution centres. New 'smart' warehouses are powered by advanced robotics and AI, transforming supply chains and distribution networks, but also placing a new layer of requirements on the specification of class B8 spaces⁴⁰.
- 6.37 Demand for these facilities is spread across the country, with more acute demand at key transport interchanges. Unlike many other locations in Nottinghamshire, Mansfield is not particularly well connected to the national Motorway network, being around 8km from the nearest M1 junctions (28 and 29), although the A60, A38, A6191 and A617 pass through the District in addition to passenger rail connections. While there are no rail freight terminals within Mansfield, there are a number of rail-served logistics sites elsewhere in the East

⁴⁰ Ocado Intelligent Automation (2024) Warehouse Robots: Essential Guide to Modern Robotics in the Warehouse. Available at: <https://ocadointelligentautomation.com/insights/warehouse-robots>

Midlands, notably at DIRFT (Daventry), East Midlands Gateway (in North West Leicestershire) and the East Midlands Distribution Centre [EMDC] (also in North West Leicestershire). According to the Nottinghamshire Core & Outer HMA Logistics Study (August 2022), these rail freight-served logistics sites totalled 1.155 million sqm in 2022, whilst in addition, SEGRO Logistics Park Northampton received a Development Consent Order [DCO] in 2019, with permission to develop up to 468,000 square metres of rail-served floor space and is currently under construction, whilst proposals for Strategic Rail Freight Interchanges [SRFIs] at Hinckley (650,000 sqm) and Etwell (East Midlands Intermodal Park, 485,000 sqm) are being promoted by developers via the DCO process (albeit the Hinckley scheme was refused by the SoS on 11th March 2025, with limited progress to date at Etwell).

- 6.38 There are, however, some strategic distribution units either within Mansfield District or immediately beyond its boundaries. This includes Summit Park, located to the south of Mansfield District off the A617 between Ashfield and Mansfield towns. Phase 1 of Summit Park currently features a 1.75 million sq ft distribution warehouse occupied by Amazon and sits over the border in Ashfield District. Beside Summit Park is Oakham Business Park which is home to a range of over 40 businesses including Marston's drinks distribution centre and a range of other distribution, manufacturing and engineering companies.
- 6.39 A Full Planning Application [2024/0242/FUL] was submitted in July 2024 on behalf of Peveril Securities (who also delivered the adjacent Amazon warehouse at Summit Park I) for the development of land at 'Summit Park II' for B8 employment use with ancillary offices together with new access, ancillary gatehouse, landscaping and servicing. The application relates to **Building 2 at Summit Park II** and is located on 'Land To The North Of The A617 Sherwood Way South/South Of Bleak Hills Lane' in the Mansfield District, beside the existing Amazon warehouse.
- 6.40 The proposed development would feature one B8 warehouse building including ancillary offices of 48,774 sqm GIA, across a 15 ha site. Although it is a cross-boundary application with Ashfield District, the proposed layout indicates that most if not all of the new warehousing would be located in the Mansfield District, with landscaping, access and car parking over the border in the Ashfield District.
- 6.41 According to the Planning Statement accompanying the planning application:
- "The application submitted to Mansfield District Council and Ashfield District Council is a full one which seeks planning permission for one Use Class B8 building (incorporating ancillary offices) of circa 48,774 sq.m GIA. In addition to the proposed building, there will be appropriate staff and visitor car parking (401 spaces) together with HGV parking areas. A new access is proposed into the site off Sherwood Way South (Mansfield/Ashfield Regeneration Route) in the form of a proposed three-arm signal controlled junction with toucan pedestrian crossings provided on the site access arm. This access is proposed to be shared with a second employment unit - a separate full planning application for which has been submitted to Ashfield District Council. The proposed building would be located close to western boundary – beyond which lies Oakham Business Park - and the main loading/unloading area for HGVs would be on the building's eastern side. HGV access*

into and out of the service yard will be managed using a small gatehouse at the entrance/exit to the service yard.”⁴¹.

- 6.42 The Planning Statement that accompanied the application noted that a separate full planning application had also been submitted to Ashfield District Council for a distribution warehouse/light industrial unit (Use Class B8) of circa 15,997 sqm GIA together with new access, ancillary gatehouse, landscaping and servicing on land to the south. The access would be shared with the proposed Summit Park II distribution warehouse. This proposed warehouse unit is referred to as **Building 1 of Summit Park II**.
- 6.43 Moving on, and as summarised in Section 3.0 of this report, the **Nottinghamshire Core & Outer HMA Logistics Study** (August 2022) was commissioned by Nottinghamshire County Council on behalf of the 8 authorities comprising the Nottinghamshire Core and Outer Housing Market Area [HMA] including Mansfield in order to understand the future demand for strategic warehousing and logistics facilities within the Study Area.
- 6.44 To recap, whilst it found that Nottinghamshire is one of the smaller industrial markets in the East Midlands by size of industrial inventory, it has been growing rapidly in the last couple of years, with increased occupier demand and an increase in construction activity, particularly in distribution and logistics. The report noted that over the last 3 years, the study area has acquired c.2 million sqft of strategic warehousing floorspace, reaching 6.9m sqft in total. Vacancy rates of logistics units over 100,000 sq.ft in the study area are extremely low, at just 0.3%. Icení states that this indicates a complete undersupply / failure of the market, with 5% considered the minimum for a functional market that allows for churn, choice and move ins.
- 6.45 The report found that most strategic warehousing projects were located along the M1 and in the outskirts of Nottingham, with two large schemes in Mansfield. It suggested that Green Belt land supply restrictions in the M1 J25-27 area had prevented delivery, putting pressure on other locations and forcing occupiers to accept less accessible locations. Junctions north of M1 J24 running to J28 are prime locations within the East Midlands in terms of location, accessibility and access to labour markets.
- 6.46 Both Phases of Summit Park would be located within the broad Area of Opportunity referred to as “*Area adjacent to M1 Junction 28 and 27*” in the Nottinghamshire Core & Outer HMA Logistics Study (August 2022).
- 6.47 As set out in the Icení report, the overall unmet need across the wider area is for 1,486,000 sqm / 425 ha over the period 2021-2040. This is substantial, although given that the forward supply has the potential to be as high as around 885,000 sqm, the net requirement is much lower. It is also relevant to note that notwithstanding the application for logistics at Summit Park II currently under consideration, Mansfield District’s contribution to this forward supply is minimal, at just 13,200 sqm at Penniment Farm Unit 1.
- 6.48 The report concludes that the residual need for strategic logistics sites in the study area falls to 137 ha – 155 ha, equivalent to around 3-5 large scale logistics parks. Given this land shortfall, five general broad areas across the study area where new strategic logistics sites should be located (Areas of Opportunity) were identified. Only one is located close to Mansfield, “*Area adjacent to M1 Junction 28 and 27 (Sutton in Ashfield, Alfreton, Kirkby*

⁴¹ Carney Sweeney (June 2024): Planning Statement Employment Development Building 2, Summit Park II

in Ashfield and towards Hucknall albeit not all roads dualled notably A611 and A608)”, an area which includes a small portion of Mansfield District’s south-westernmost area (encompassing Summit Parks I and II).

6.49 Mansfield is around 8.5 km to the east of J28 of the M1 (accessed via the A38) hence the majority of the District could be considered a secondary logistics location compared to other parts of the County with better access/proximity to the M1. Nevertheless, it is noted that the southernmost part of the District does have better access linkages to the wider Strategic Road Network [SRN] and is in close proximity to a very large strategic distribution warehouse operated by Amazon, just across the border in the Ashfield District. As set out above, a full planning application has been submitted for Phase II of Summit Park in the Mansfield District (straddling the border with Ashfield) which proposes a new 48,774 sqm B8 logistics warehouse, with a separate application in for a c.16,000 sqm related warehousing scheme immediately over the border in Ashfield, demonstrating that demand exists for logistics in this part of the District at least.

6.50 **Given that other parts of the County appear to be more favourably located from a logistics perspective than Mansfield to contribute towards meeting this floorspace shortfall, it is likely that Mansfield District’s role will be more limited than elsewhere. However, that is not to say that it has no role whatsoever, and clearly there is market demand to deliver logistics units particularly in the southern reaches of the District on well located, sustainable sites.**

6.51 **It is understood that a Statement of Common Ground in relation to the Greater Nottingham Strategic Plan is currently circulating between the constituent LPAs regarding the potential distribution of this unmet logistics need. It recognises that within Mansfield District there are limited opportunities to deliver strategic distribution, but the area would contribute towards meeting non-strategic need. It will be for the Council(s) to agree the extent to which Mansfield should contribute significantly towards meeting that need moving forward.**

Existing Clusters and Supply Chain

6.52 Existing clusters also have an influence on the locational decisions of businesses within the modern economy industries. Clusters of firms in the same industry and of those within the supply chain or wider ecosystem enable actors to benefit from agglomeration economies (economic efficiencies from co-location).

6.53 The UK Innovation Clusters Map from the Department for Science, Innovation and Technology [DSIT] provides a useful tool for identifying clusters of modern economy sectors⁴². The industry groupings applied to the innovation clusters use Real-time Industrial Classifications [RTIC] from The DataCity⁴³ based on data from the IDBR, Innovate UK, and UK Research and Innovation [UKRI], among other sources.

⁴² Department for Science, Innovation and Technology (DSIT) (2024) The Innovation Clusters Map. Available at: <https://www.innovationclusters.dsit.gov.uk/>

⁴³ The Data City (n.d.) Available at: <https://thedatacity.com/>

- 6.54 The RTIC sectors relate to emerging industries that are not fully covered by the SIC system, last updated in 2007. RTICs are grouped into 48 ‘emerging’ sectors, including sectors for Artificial Intelligence, Advanced Manufacturing and Data Infrastructure that are separate from the broader SIC code they would typically be classified under. Table 6.2 considers the RTIC definitions relevant to the modern economy industries to identify existing innovation clusters in Nottinghamshire. In particular, DataCity identifies a significant number of firms in the life science industry, although proportionately Nottinghamshire has a higher level of turnover relative to the national level when it comes to e-commerce. However, all three clusters make a relatively small contribution to the overall national picture and it is likely that Mansfield has a comparatively small proportion of all three Modern Economy sectors of the Nottinghamshire total.

Table 6.2 Modern economy clusters within Nottinghamshire

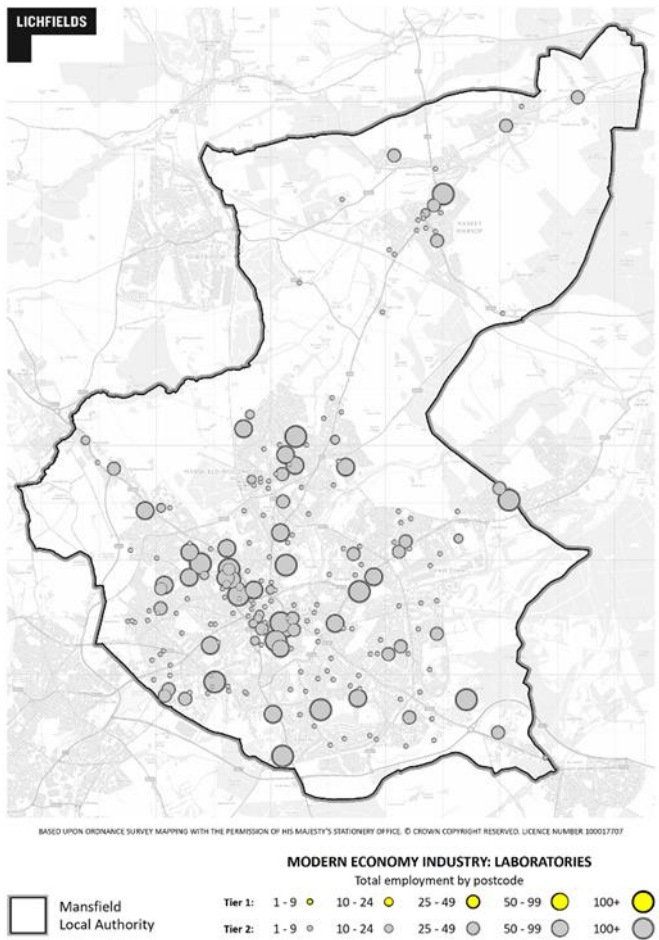
Cluster	Modern Economy Sector Match	Distinct Companies	Estimated Turnover	Share of UK Sector
Life Sciences	Laboratories	468	£616 million	0.57%
E-Commerce	Freight and Logistics	39	£93 million	1.10%
Artificial Intelligence	Digital Infrastructure	31	£221 million	0.88%

Source: DSIT (2024)

- 6.55 The type and location of clusters depends on the availability of resources (including land and labour) for the sector: ‘knowledge-intensive’ activities in the laboratories sector are more likely to require access to “*large and diverse labour pools and therefore concentrate in denser urban environments and occupy a smaller spatial footprint*”⁴⁴.
- 6.56 Meanwhile, gigafactories, data centres and logistics will require both land and skilled labour. Industries such as these, which require more space, “*are more likely to co-locate in suburban locations where office parks and manufacturing sites are more prevalent*”. This is similarly noted in the 2025 *Oxford to Cambridge: Science, Innovation and Technology Business Premises Study*⁴⁵, which highlights that Science, Innovation and Technology (SIT) businesses prefer to be located within clusters with high-quality, modern facilities and nearby amenities, in addition to good public transport accessibility.
- 6.57 However, the RTIC sector clusters do not capture all facets of the modern economy as set out within the NPPF24. SIC-based definitions – established earlier in this Section (and Appendix 1) – can be used to map both Tier 1 and Tier 2 supply chain businesses, as shown in Figure 6.6 to Figure 6.9. These maps reveal areas with a strong presence of businesses supporting the modern economy that are most prevalent in Mansfield, particularly in the centre of the District and to the north. It is important to note that only certain activities within these Tier 2 businesses, upstream or downstream, will be directly linked to the modern economy.

⁴⁴ DSIT (2024) Identifying and describing UK Innovation clusters, DSIT Research Paper No. 2024/001⁴⁵ Iceni Projects (2025) Oxford to Cambridge: Science, Innovation and Technology Business Premises Study, Oxford to Cambridge Pan-Regional Partnership

Figure 6.6 Tier 1 & 2 laboratory-related business units in Mansfield



Source: ONS IDBR, 2024

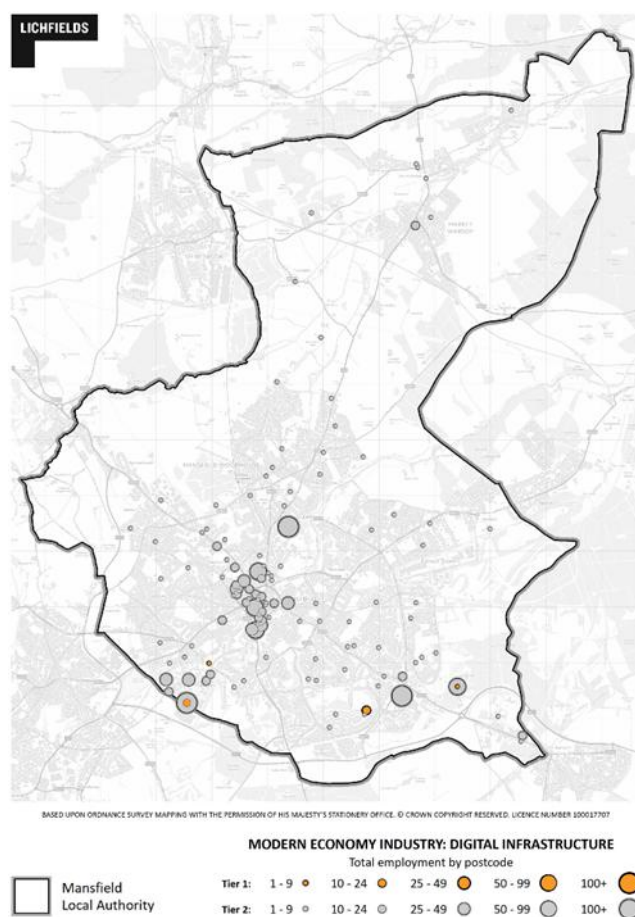
- 6.58 These figures also demonstrate the relative size of the firms within the modern economy supply chains in Mansfield; while business units in the digital technology supply chain are more likely to have just a handful of employees – with an average employment of 5 FTE – upstream and downstream firms in laboratory-related sectors are generally larger⁴⁶.
- 6.59 There are a range of activities across Mansfield that are dependent on, or feed into, scientific research and development. Shown in Figure 6.6, there are no significant Tier 1 **Laboratories** in Mansfield District; Tier 2 activities (of which there are many in the District) related to laboratories (and research, development and innovation more generally) include education; professional, scientific and technical activities; engineering, among others.
- 6.60 Many of the businesses identified within the Tier 2 laboratory-related sector in Mansfield specialise in engineering or educated-related activities. However, the majority of these businesses provide office-based and professional-related services rather than laboratories for research and development purposes.
- 6.61 The most prominent presence in Mansfield by employment is West Nottinghamshire College, a post-16 education facility and university-level college in Mansfield. The College

⁴⁶ ONS (2024) Inter-Departmental Business Register

includes the UK's first Gene Haas Centre for Advanced Manufacturing which specialises in Computer Numerical Control [CNC] Machine Automation manufacturing and engineering⁴⁷. Other prominent employers in the District include the Mining Remediation Authority, formerly the Coal Mining Authority; and BM Catalysts Ltd, a leading manufacturer of aftermarket hot end emissions products⁴⁸. However, it is worth noting that given the wider services provided by some of these sites, such as those at West Nottinghamshire College, a number of employees are unlikely to work in laboratory-related services.

6.62 Shown in Figure 6.7, firms within the **digital infrastructure** supply chain are clustered in Mansfield Town Centre. This is reflective of the office-based nature of these firms, with the most prominent businesses within the supply chain operating in management consultancy, accounting and auditing, and legal and patent-related businesses.

Figure 6.7 Tier 1 & 2 digital infrastructure business units in Mansfield



6.63 As the most established modern economy presence within Mansfield, there are many businesses within the wider **freight and logistics** supply chain. These are shown in Figure 6.8. Most prominently, these businesses are wholesalers, including of construction materials, machinery, and metals. Key logistic supply chain businesses also include those

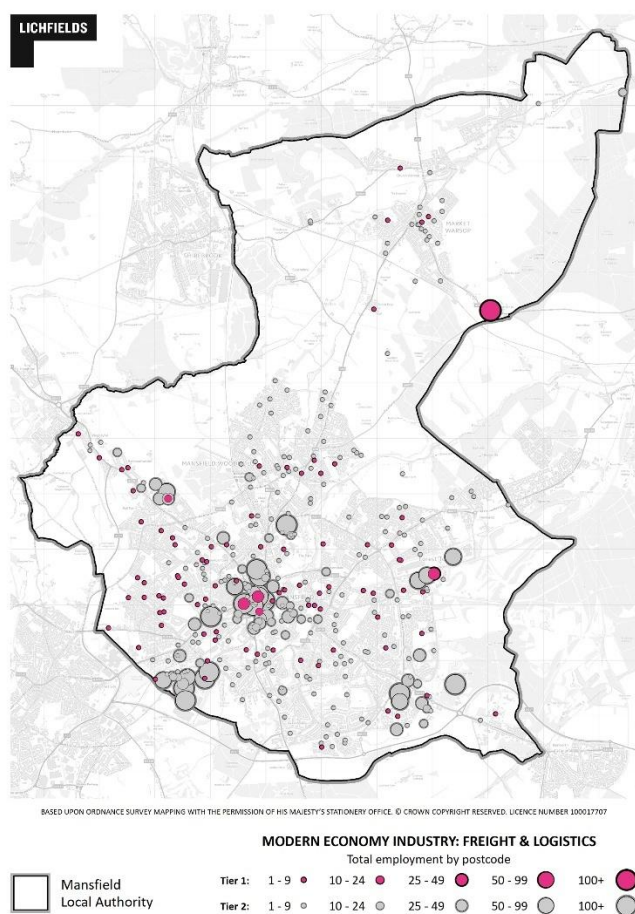
⁴⁷ [Gene Haas Centre for Advanced Manufacturing - West Notts College](#)

⁴⁸ [Manufacturer of aftermarket hot end emissions products](#)

related to packaging activities and business support services. These businesses are positioned towards the centre and south west of the District. The notable exception is the Bowring Transport Company, based at Windmill House Farm to the east of Warsop, on the A6075. Founded in 1974, Bowring Transport has grown from modest beginnings in livestock haulage to become one of the East Midlands' largest privately owned transport companies with a fleet of over 90 specialist heavy haulage vehicles for construction and agriculture and employing over 100 staff⁴⁹.

- 6.64 In general, however, Mansfield Districts relatively limited Tier 1 logistics capability is likely due to proximity to key road connections including the A60 and A617, as well as the main business parks, such as Oakham Business Park and Summit Park I (Amazon) just over the border in Ashfield.

Figure 6.8 Tier 1 & 2 freight and logistics business units in Mansfield



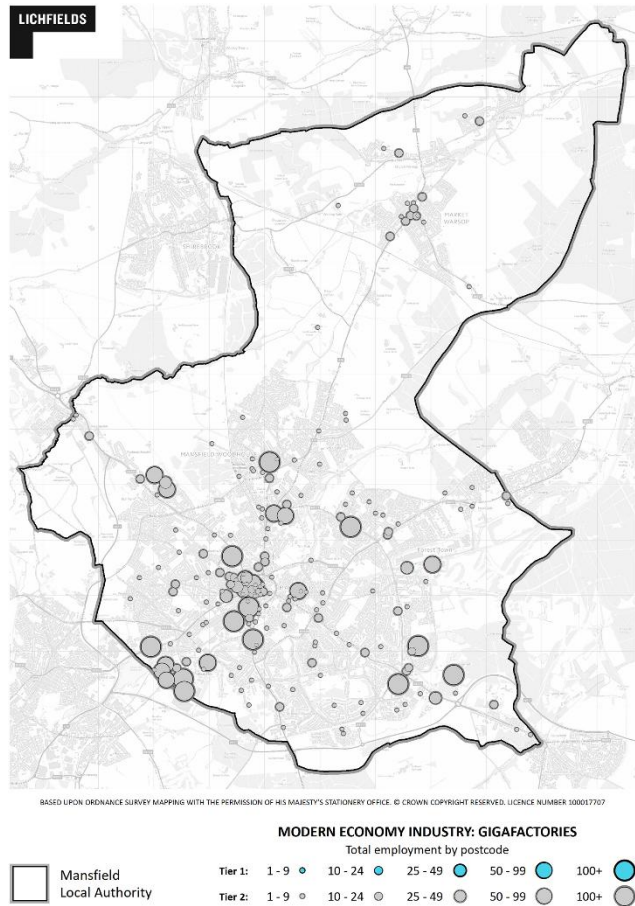
Source: ONS IDBR, 2024

- 6.65 As shown in Figure 6.9, there are no **Tier 1** businesses in Mansfield directly related to car and battery manufacturing (a proxy for **gigafactories**); however, there is an established wider supply chain ecosystem across the study area (Tier 2). Most predominant are firms

⁴⁹<https://bowringtransport.co.uk/about-us/about-bowring-transport/>

specialising in retail and computer consultancy and software development.

Figure 6.9 Tier 1 & 2 gigafactory-related business units in Mansfield



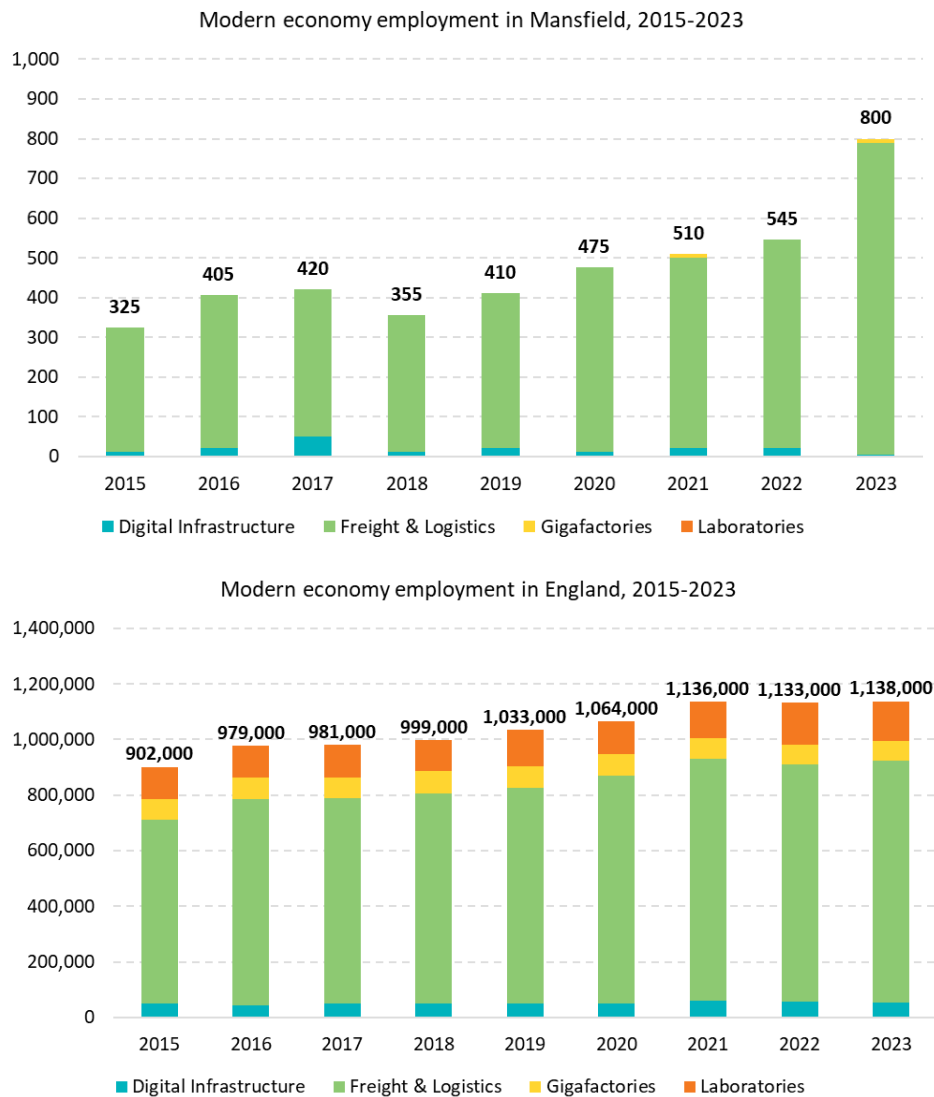
Source: ONS IDBR, 2024

Employment and Labour Supply

Historic Trends

- 6.66 Figure 6.10 shows employment in (Tier 1) modern economy industries, as defined above, in the Mansfield District and nationally between 2015 and 2023.
- 6.67 A total of 800 jobs, representing 1.8% of total employment in Mansfield, are within the broad modern economy industries. As shown, freight and logistics dominate the employment figures at both the Mansfield and national level, representing 98.1% of modern economy roles in Mansfield in 2023. Gigafactory-related employment, which as highlighted above is particularly limited within Mansfield and Nottinghamshire more generally, formed 1.3% of total modern economy jobs in the study area in 2023, while digital infrastructure accounted for a very modest proportion of 0.6% with no direct employment in laboratories.

Figure 6.10 Employment by modern economy industry by year, Mansfield and England



Source: ONS BRES, 2023

- 6.68 This distribution results from the nature of freight & logistics as a well-established industry across Nottinghamshire and within England more widely, in addition to the labour-intensity of their operations. Meanwhile, both data centres and gigafactory-related activities (i.e., EV battery manufacturing) are relatively new to the UK economy. While laboratories are not a new form of land use, the life sciences sector has seen increased interest in recent years but tends to be heavily concentrated in a handful of locations nationwide such as Cambridge, Manchester City, Greater London and Oxfordshire.
- 6.69 Overall, employment growth based in the modern economy industries in Mansfield (11.9%) significantly outstripped the average growth rate across all sectors over the period 2015-2023 (1.6%). The highest annual growth rate in Mansfield was seen in the freight and logistics sector, with employment rising 12.5% year-on-year over the period based on the sectors compound annual growth rate. This demonstrates the (perhaps surprisingly) high representation of, and demand for, the sector. This is in contrast to the national level,

where average annual freight and logistics employment growth was just 3.5% over the period.

- 6.70 Employment in gigafactory-related industries in Mansfield has typically remained around zero over this period; however, the latest figure for 2023 did indicate that 10 people were now employed in the sector in Tier 2 jobs. In the laboratory-related industries, the sector has seen no people employed in the sector. Those working in digital infrastructure-related industries in Mansfield decreased by -8.3% year-on-year to only 5 people employed in 2023.

Comparative Advantage

- 6.71 The modern economy uses are identified within the NPPF²⁴, and the growth sectors more broadly within the Industrial Strategy, for their ability to drive economic growth and development at the national level. When planning for the modern economy, it falls to local authorities to decide how they can take proactive decisions within the planning system that enable and facilitate the national growth agenda.
- 6.72 To maximise efficiencies, and hence the potential economic benefits, an area should assess its comparative advantage in providing for the modern economy industries, and in what form.
- 6.73 This requires consideration of the demand and supply conditions across the country to establish:
- a Where best to locate development for the distinct industries of the modern economy; and
 - b Which industries each local authority should be most proactively supporting.
- 6.74 This approach recognises that no area will be able to effectively support all modern economy industries – given their varying industrial, spatial and skills requirements – but that each area can take a proactive stance to support the modern economy in the sectors most aligned to their local economy.
- 6.75 To assess Mansfield’s potential to host modern economy industries, in addition to the research and analysis presented previously, Lichfields’ bespoke framework for planning for the modern economy has been applied. The framework brings together demand and supply factors to assess the relative suitability – the comparative advantage – of individual local authorities to host the modern economy industries, based on the definitions outlined above. In this instance, freight and logistics are considered separately, owing to their distinct development, infrastructure and labour requirements.
- 6.76 This draws on a range of data sources and mapping inputs including:
- the existing stock of data centres, laboratories and warehouses across England from the VOA and CoStar;
 - statistics on air and sea freight tonnage from the Department for Transport (DfT), and the locations of key rail freight interchanges from Network Rail;
 - the locations of motorway junctions as a proxy indicator for road freight; and
 - the locations of major car and battery manufacturing plants from ACEA.

- 6.77 This has been triangulated with data from the ONS, including UK business counts and Census 2021 occupations data as a proxy for skills.
- 6.78 The results of the framework correspond to a high-medium-low ranking of opportunity on both the demand-side and supply-side, which are brought together to provide an overall ranking out of all local authorities in England. Demand-side factors include the number of premises and business units in the industry per sq.km (as an indicator of existing demand), while the supply-side considers the labour skills profile and, for relevant industries, transport and freight linkages.
- 6.79 As shown in Table 6.3, Mansfield largely scores low-to-medium on both demand and supply conditions for most modern economy sectors, with the (perhaps surprising) exception of freight and logistics which scores high on demand relative to many other local authority districts in England. Overall, however, this results in low rankings, placing Mansfield overall in the bottom 30% of authorities at 245th on the Lichfields assessment.

Table 6.3 Comparative advantage of Mansfield in the modern economy industries

Modern Economy Industry	Demand conditions	Supply conditions	Overall ranking (/308 authorities)
Laboratories	Low	Low	Low – 303
Gigafactories	Low	Medium	Low – 221
Digital infrastructure	Low	Low	Low – 290
Freight & Logistics	High	Medium	High – 89
Modern Economy Industry	Demand conditions	Supply conditions	Overall ranking (245/308 authorities)

Source: ONS (2021) / Lichfields Analysis

- 6.80 As noted above, Mansfield does have a strong comparative advantage in freight and logistics. While both demand and supply conditions are favourable, the factors primarily influencing Mansfield's relative performance in freight and logistics are largely demand-side.
- 6.81 The demand score factors in both Mansfield District and the wider Mansfield Travel To Work Area [TTWA]. Mansfield's strong performance in freight and logistics is primarily attributable to the proportion of existing business units in the sector or related sectors which are currently in Mansfield, with freight and logistics-related business units comprising 7.1% of all business units in the District, and 5.7% when factoring into the wider TTWA. Whilst Mansfield is not near major freight terminals, analysis of IDBR data indicates that the District contains many businesses which operate within haulage, handling of goods, and transportation support services, as well as those in the supply chain which is largely firms operating within the wholesale of goods.
- 6.82 As noted above, perhaps the largest is Bowring Transport Company in the north east of the District off the A6075, which employs over 100 staff and is now one of the East Midlands' largest privately owned transport companies with a fleet of over 90 specialist heavy haulage vehicles for construction and agriculture. The District also contains Carlsberg & Marston Brewing, which employ relatively high numbers of people. In general, however, the vast majority of logistics-related firms based in Mansfield are small businesses, employing fewer than 5 people.

- 6.83 In general, Mansfield's relative lack of favourable demand and supply conditions for the other modern economy sectors place limits on its potential comparative advantage. This includes a low supply of existing laboratory units, which only comprise 0.3% of existing units in Mansfield and 0.4% in the wider TTWA. There is also a low supply of related-skills in the sector, with only 1.98% of existing occupations possessing the skills required, which rises to only 2.10% across the wider TTWA.
- 6.84 The District's lack of airport and rail freight terminals, as well as direct motorway connections limits its transport capabilities to support the gigafactory sector. Despite ranking 79th in terms of unconstrained land, these factors limit the District's supply potential and results in it having a low comparative advantage overall.
- 6.85 Finally, Mansfield has relatively weak comparative advantage across digital infrastructure which is predominantly due to the lack of related business units in the District which only contains 0.5% of units overall. This is unsurprising given there are no recorded existing data centres within the District. Whilst the District contains many characteristics of the skill set for the sector, it is still relatively low when compared to many other local authorities across England.

Industry Outlook

Laboratories

- 6.86 The short to medium term national outlook for the life sciences sector – the key industry most closely associated with (wet) laboratory space – is strong, with demand for space outstripping current available supply⁵⁰. Investor sentiment in the laboratory sector has been positive, buoyed by public sector support with the UK continuing to have the second-highest budget allocation for health R&D among comparator countries⁵¹.
- 6.87 CBRE estimates suggest that approximately 185,000 sq.m (2 million sq.ft) of laboratory space was to be delivered in 2024, primarily within the Cambridge-Oxford-London 'Golden Triangle'.
- 6.88 Meanwhile, Savills cites that R&D investment strategies are placing increased focus on technology development, including hardware and software, which is driving firms toward major cities – especially London – in order to tap into the existing labour pool at technology companies⁵². This is driven by the rise of AI and its applications in scientific research. However, in London and across the Golden Triangle, poor housing affordability is likely to constrain further the ability of life sciences and laboratory-based firms to attract skilled labour from elsewhere in the UK and overseas.
- 6.89 At the Mansfield level, Experian is conservative in its projections of employment growth in the pharmaceuticals sector (as the closest proxy to laboratories) between 2025 and 2045 with employment forecasted to be unchanged and remain at 300.

⁵⁰ CBRE (2023) UK Real Estate Market Outlook 2024

⁵¹ Office for Life Sciences (2024) Life sciences competitiveness indicators 2024: summary. Available at: <https://www.gov.uk/government/publications/life-sciences-sector-data-2024/life-sciences-competitiveness-indicators-2024-summary>

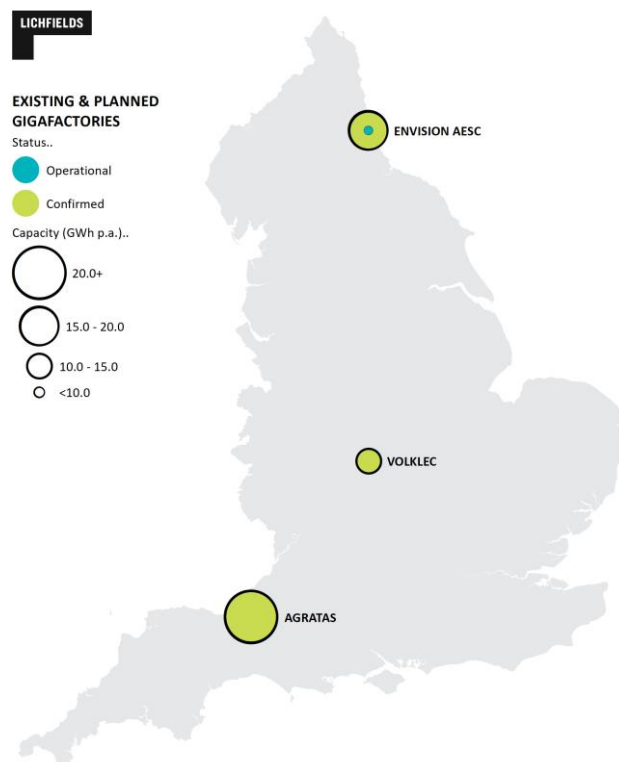
⁵² Savills (2024) Life Sciences: Trends & Outlook. Available at: https://www.savills.co.uk/research_articles/229130/359450-0

- 6.90 As demonstrated by the existing stock of laboratory-related premises and businesses within Mansfield, supporting the modern economy can take many forms. This can include conventional office units to host the operations or professional-related services of firms conducting scientific research, as well within education-related units which support development-related activity (such as the Gene Haas Centre for Advanced Manufacturing located within West Nottinghamshire College).

Gigafactories

- 6.91 The demand (and hence outlook) for gigafactories is closely linked to the EV market. AutoTrader's *Road to 2030* report highlights strong year-on-year growth in EV sales in the UK between 2019 and 2024, reaching 382,000 new EV registrations in 2024, up 21% on 2023⁵³. The UK is now the third-largest EV market globally by volume of transactions. However, at present battery manufacturing is not domestic, with the exception of the AESC (Nissan) plant in Sunderland.
- 6.92 As highlighted above, the Faraday Institution projects a need for domestic production capacity of 200 GWh per annum by 2040, compared to the UK's current capacity of just 2 GWh per annum⁵⁴.

Figure 6.11 Existing and confirmed future gigafactories in England



Source: Faraday Institution/Lichfields research

⁵³ AutoTrader (2025) Road to 2030. Available at: <https://autotraderroadto2030.co.uk/>

⁵⁴ The Faraday Institution (2024) UK electric vehicle and battery production potential to 2040

- 6.93 As shown in Figure 6.11, confirmed capacity is to be located in Sunderland and Somerset, while battery manufacturer Volklec has recently announced plans to begin producing batteries at the UK Battery Industrialisation Centre (UKBIC) near Coventry⁵⁵. Together, these three facilities would have a production capacity of just under 66 GWh per annum, however, this falls far short of the Faraday Institution's estimated required UK capacity of 110 GWh by 2030.
- 6.94 Nevertheless, this does not preclude Mansfield, or Nottinghamshire more generally, from participating in the gigafactory and EV ecosystem. The growth of the industry in the UK is not solely dependent on developing manufacturing plants but also on establishing the domestic supply chain, both upstream (e.g., raw materials and cell components) and downstream (e.g., recycling). Existing activity in the wider ecosystem within Mansfield is predominantly concentrated in-and-around Oakham Business Park, with firms such as Glenair designing and manufacturing parts within the aerospace, defence, industrial and commercial sectors. More widely, a number of firms located in the area also specialise in manufacturing and engineering, including tools, metalwork solutions, data cabling, and IT solutions.
- 6.95 To support the development of the gigafactory and electric vehicle industries at the national scale, Mansfield / Nottinghamshire should focus on how it can provide suitable employment land sites across office and light industrial uses. In particular, given its specific strengths and presence locally, supporting its manufacturing and engineering business base to work more closely within the gigafactory and EV ecosystem.

Data Centres

- 6.96 Projections of data centre market growth to 2030 range between 19% and 27% at the international level, with strong growth prospects for 2025 of 22% year-on-year in Europe^{56,57}.
- 6.97 AI places significant demand on data centre capacity – already taking up 25% of global data centre workloads – and is continuing to build momentum. It is estimated that approximately 70% of future demand is for data centres capable of hosting advanced AI, and by 2030 up to 65% of AI workloads will be hosted within 'hyperscale' data centres, primarily those belonging to Cloud Service Providers [CSPs].
- 6.98 While there is no established definition of a 'hyperscale' data centre, floorspace is typically not the defining metric: instead, data centres are often measured by their power consumption or cooling loads⁵⁸. Average data centre power consumption increases with demand, and as such, grid infrastructure has become a binding constraint on data centre development. According to RLB, the power density of data centres has doubled from 2kW per sq.m to 4kW per sq.m in recent years⁵⁹. Rising energy demand, and hence heat

⁵⁵ BBC News (26 February 2025) Battery firm announces gigafactory plan. Available at: <https://www.bbc.co.uk/news/articles/c4gdx4dg41o>

⁵⁶ McKinsey (2024) AI power: Expanding data center capacity to meet growing demand. Available at: <https://www.mckinsey.com/industries/technology-media-and-telecommunications/our-insights/ai-power-expanding-data-center-capacity-to-meet-growing-demand> [Accessed September 2025]

⁵⁷ CBRE (27 May 2025) Data Centre Take-up in Europe to Reach New Peak in 2025. Available at: <https://www.cbre.co.uk/press-releases/data-centre-take-up-in-europe-to-reach-new-peak-in-2025> [Accessed September 2025]

⁵⁸ Nicholson, R. (10 July 2024) Data centre growth seen in scaled schemes and retrofits. RCIS Journal. Available at: <https://www3.rics.org/uk/en/journals/construction-journal/data-centre-demand-retrofit.html>

⁵⁹ RLB (2024) Data Centre Trends Report 2024. Available at: <https://www.rlb.com/europe/insight/data-centre-trends-report-2024/>

generation, may also fundamentally alter the design of data centres in a shift to liquid cooling from conventional heating, ventilation and air conditioning [HVAC] systems.

- 6.99 The future of technology is fundamentally uncertain: there is extensive discourse surrounding whether the data centre as we know it today will soon become obsolete, or whether advances in technology will allow us to host the same workloads in significantly smaller spaces. The latter has already been reflected in the emergence of smaller ‘edge’ data centres, located close to end-users, designed to reduce latency and take the strain from hyperscalers⁶⁰. Common across the data centre sector is a need to plan against obsolescence, by ensuring facilities are built with a lifecycle approach and are suitable for retrofit⁶¹.
- 6.100 London and its surroundings represent one of the largest clusters of data centres, both nationally and internationally. London’s existing profile as the primary data centre hub nationally (particularly within the Slough-Hayes corridor and across East London) makes it a prime location for future investment in data centre development, due to the geographical clustering effects associated with data centre activity and associated infrastructure.
- 6.101 A review of local planning applications in Mansfield has identified no applications including the provision of a data centre or associated floorspace as of September 2025. In addition, analysis of data provided by CoStar indicates that there are no data centres which are under construction or proposed within the District.

Freight and Logistics

- 6.102 The sector has a considerable footprint across the national economy, contributing £185 billion to UK GVA. Logistics UK cites that *“with appropriate investment, policy changes and the right partnerships with government”*, the sector could add £7.9 billion per year to GDP by 2030 from productivity gains⁶².
- 6.103 BDO highlights the growing role of AI, digital and cybersecurity within the transport and logistics industry, which will optimise route planning, inventory management, and deliver cost savings, while also boosting the resilience of the industry⁶³. As a result, labour requirements within the sector are shifting, resulting in increased demand for higher-skilled, manager- and director-level roles. With regard to land use and development implications, e-commerce is set to continue to place emphasis on the speed of delivery, with ‘micro-fulfilment’ centres enabling same-day or faster deliveries.
- 6.104 Efficiency, reliability, resilience and environmental sustainability are key focuses of the ‘technology and data-enabled opportunities’ within the national Future of Freight long-term plan⁶⁴. Such an approach also aligns with paragraph 87b of the NPPF24, which requires planning policies and decisions to make provision for *“storage and distribution operations at a variety of scales and in suitably accessible locations that allow for the*

⁶⁰ JLL (2023) Why smaller data centers are taking off. Available at: <https://www.jll.co.uk/en/trends-and-insights/cities/why-smaller-data-centers-are-taking-off>

⁶¹ JLL (2024) Why data centers could hit obsolescence sooner than you think. Available at: <https://www.jll.co.uk/en/trends-and-insights/investor/why-data-centers-could-hit-obsolescence-sooner-than-you-think>

⁶² Logistics UK (11 June 2024) Logistics sector primed for future growth says Logistics UK. Available at: <https://logistics.org.uk/media/press-releases/2024/june/logistics-sector-primed-for-future-growth-says-log>

⁶³ BDO (2024) 2025 Predictions for the Transport and Logistics Industry. Available at: <https://www.bdo.co.uk/en-gb/insights/advisory/risk-and-advisory-services/2025-predictions-for-the-transport-and-logistics-industry>

⁶⁴ Department for Transport (DfT) (2022) Future of Freight: A long-term plan

efficient and reliable handling of goods, especially where this is needed to support the supply chain, transport innovation and decarbonisation”.

- 6.105 Further, retrofit and refurbishment activity would enable development in the freight and logistics sector to exploit significant cost savings on the low land values within Mansfield. Related to this, Nottinghamshire could become a candidate for micro-fulfilment centres to serve growing e-commerce sales and consumer demand for ever-faster fulfilment and delivery.
- 6.106 As discussed in Section 2.0, the Nottinghamshire Core & Outer HMA Logistics Study (August 2022) reported that Nottinghamshire’s logistics market has been growing rapidly in the last couple of years, with increased occupier demand and an increase in construction activity, particularly in distribution and logistics. CoStar reported that industrial occupier demand has surged to all-time highs in Nottingham in 2022. Distribution and third-party logistics firms have been particularly active in the market.
- 6.107 Nottinghamshire contains the national artery M1 corridor and forms the uppermost part of the ‘Golden Triangle’ being the national centre of the UK logistics market whereby many other parts of the UK can be reached in a 4hr drive time. The southern edge of Nottinghamshire extends towards Castle Donnington, East Midlands Airport and Gateway, where J24 of the M1 and the A50 interchange is a key logistics hub and national distribution logistics location. Moving north, much of the M1 Corridor is covered by Green Belt policy which restricts development. The Nottinghamshire Core & Outer HMA Logistics Study noted that Nottinghamshire has grown its strategic warehousing stock at a similar proportion to the rest of the East Midlands, albeit from a smaller base. Vacancies have continually decreased until reaching an all-time low of 0.3% in 2021. This figure indicates a complete undersupply / failure of the market, with 5% considered the minimum for a functional market that allows for churn, choice and move ins [paragraphs 14.6-14.8].
- 6.108 Key future messages from stakeholders reported in the study included the following:
- *“There are ongoing requirements for sites of 500,000 sqft - 1,000,000 sqft along the Nottinghamshire M1 for logistics and manufacturing however the lack of units means they are pushed out of the area – losing major economic growth opportunities.*
 - *Land supply restriction (Green Belt) in the M1 J25-27 area has completely thwarted delivery, putting pressure on other locations and forcing occupiers to accept less accessible locations.*
 - *Junctions north of M1 J24 running to J28 are prime locations within the East Midlands in terms of location, accessibility and access to labour markets.*
 - *There is a difference between sites on the M1 and wider Study Area, with M1 prime territory for largest units (which are not usually residential compatible). M1 spine and surrounds are primary target areas, 5km of a junction can be an occupier requirement (or trunk road).”* [paragraph 14.9]
- 6.109 However, whilst the report identifies a residual need for between 137 ha and 155 ha to 2040, the suggestion in the report was that new strategic logistics parks should be directed towards five Areas of Opportunity across Nottinghamshire, focused primarily along the M1 Corridor and Newark. The Mansfield District is partially located within one of these areas (Area adjacent to M1 Junction 28 and 27), although it only comprises a very small part to

the south west of the District. As noted above, a full planning application has been submitted for Phase II of Summit Park in the Mansfield District (straddling the border with Ashfield) which proposes a new 48,774 sqm B8 logistics warehouse, with a separate application in for a c.16,000 sqm related warehousing scheme immediately over the border in Ashfield, demonstrating that demand exists for logistics in this part of the District which falls within one of the Nottinghamshire Core & Outer HMA Logistics Study's Opportunity Areas.

- 6.110 Mansfield is therefore likely to be on the periphery of strategic logistics provision going forward due primarily to its location some way from the M1 junctions. It is not likely to take a significant share of the 137-155 ha (equivalent to 2-3 large strategic logistics parks) of unmet need as a consequence, but as noted above, that is not to say that it has no role whatsoever, and clearly there is market demand to deliver logistics units (notably small and mid-box in scale), particularly in the southern reaches of the District on well located, sustainable sites.

Conclusions

- 6.111 Following the new direction of national policy, the objective of this section of the ELRU has been to establish the current level of representation of the modern economy within Mansfield's economy, where the greatest growth potential lies, and how local economic growth and development can be supported. The Industry Outlook is as follows:

Laboratories

- There is strong industry and developer interest in the life sciences sector across the UK, driving demand for both wet and dry laboratory facilities, particularly within the 'Golden Triangle' between Cambridge, Oxford and London. The pharmaceuticals sector has a limited presence in Mansfield, with only two recorded laboratories located in the nearby City of Nottingham and no Tier 1 laboratory-related businesses identified by ONS IDBR data. Mansfield also ranks poorly in terms of both demand and supply-related conditions for attracting future laboratory businesses.

Gigafactories

- New gigafactory development have been confirmed in Sunderland and Somerset, as car manufacturers strike a balance between co-location with car manufacturing plants and the large space requirements for gigafactories. However, the capacity of these sites, in addition to the commencement of battery manufacturing at UKBIC in Coventry later in 2025, will fall well short of the projected national annual requirement for 2030⁶⁵.
- While development of a full-scale gigafactory is unlikely to be on the horizon for Mansfield owing to the constraints identified previously, the District does contain high levels of expertise and established presence within advanced manufacturing and engineering which could be harnessed to support the wider supply chain.

⁶⁵ DSIT (2024) The Innovation Clusters Map. Available at: <https://www.innovationclusters.dsit.gov.uk/>

Data Centres

- There are a growing number of data centres across London and the South East. However, there is a lack of data centre presence within Mansfield or the wider Nottinghamshire region, with no data centres identified as planned or under construction.

Freight and Logistics

- The Nottinghamshire Core & Outer HMA Logistics Study (August 2022) reported that Nottinghamshire's logistics market has been growing rapidly in the last couple of years, with increased occupier demand and an increase in construction activity, particularly in distribution and logistics. CoStar reported that industrial occupier demand has surged to all-time highs in Nottingham in 2022. Distribution and third-party logistics firms have been particularly active in the market. Nottinghamshire contains the national artery M1 corridor and forms part of the 'Golden Triangle' being the national centre of the UK logistics market whereby many other parts of the UK can be reached in a 4hr drive time.
- According to commercial agents, the report states that there are ongoing requirements for sites of 500,000 sqft - 1,000,000 sqft along the Nottinghamshire M1 for logistics and manufacturing however the lack of units means they are pushed out of the area – losing major economic growth opportunities. Land supply restrictions in the M1 J25-27 area has made delivery difficult in recent years, putting pressure on other locations and forcing occupiers to accept less accessible locations. Junctions north of M1 J24 running to J28 are prime locations within the East Midlands in terms of location, accessibility and access to labour markets.
- Whilst the report identifies a residual need for between 137 ha and 155 ha (equivalent to 2-3 large strategic logistics sites), the opportunity areas to meet that need focus primarily along the M1 Corridor and Newark. Mansfield is on the periphery of strategic logistics provision going forward due primarily to its location some way from the M1 junctions. Although there are some opportunities, particularly at the very south of the District around Summit Park, the District is unlikely to take a significant share of the unmet need as a consequence.
- Nevertheless, there is a Statement of Common Ground in relation to the Greater Nottingham Strategic Plan currently circulating between the constituent LPAs regarding the potential distribution of this unmet logistics need. It recognises that within Mansfield District there are limited opportunities to deliver strategic distribution, but the area would contribute towards meeting non-strategic need. It will be for the Council(s) to agree the extent to which Mansfield should contribute significantly towards meeting that need moving forward. Clearly there is market demand to deliver logistics units (notably small and mid-box in scale), particularly in the southern reaches of the District on well located, sustainable sites.

Policy Implications

- 6.112 In light of the update to the NPPF24, planning policy and decisions should consider Mansfield's role in supporting the modern economy, and the national growth agenda more

widely, through exploiting Mansfield's comparative advantages and associated economic growth potential.

- 6.113 As part of building a strong, competitive economy in Mansfield, planning policy could pay attention to the spatial and locational requirements of both established and emerging industries. It is already recognised that Mansfield has existing potential within manufacturing, healthcare and logistics.⁶⁶ Analysis of the modern economy has identified that Mansfield is well positioned to support further development of freight and, to a lesser extent, logistics. However, there is also the potential to support supply chain businesses within the laboratory sector with a notable presence of education, professional and engineering-related activities that make up Tier 2 laboratory.
- 6.114 In general, the above analysis indicates the economic importance of freight and logistics locally and suggests that MDC's planning policy should explicitly recognise this and proactively help to facilitate development to meet business needs within these modern economy sectors. Freight and logistics are sectors that provide critical infrastructure to allow other activities, including those within the modern economy, to take place. Therefore, supporting growth directly within these sectors may offer wider benefits to the District's economy.
- 6.115 Conversely, while growth in digital infrastructure, gigafactories and laboratory-related sectors at the national level is forecast to remain strong over the medium term at the national level, the current lack of activity in Mansfield, in addition to locational and physical constraints in terms of large data centres and gigafactories respectively, limits the District's comparative advantage in these sectors.
- 6.116 Facilities and infrastructure to support the freight and logistics industry should be recognised for their role as an enabler of growth in the local economy. As identified within the Nottinghamshire Core & Outer HMA Logistics Study, additional floorspace will be required across Nottinghamshire to support a range of businesses and to effectively serve consumers. The locations of these units will be influenced by transport accessibility, land supply and land availability. In relation to the modern economy, however, new strategic logistics provision is likely to be focused along the M1 Corridor and Newark, rather than the Mansfield District going forward. That is not to say that it has no role whatsoever, and clearly there is market demand to deliver logistics units (notably small and mid-box in scale), particularly in the southern reaches of the District on well-located, sustainable sites.
- 6.117 While the focus of this report has been primarily placed upon paragraph 86c of the NPPF24 regarding considering the needs of the modern economy, it is pertinent to consider paragraph 86d, which states that planning policies should "*seek to address potential barriers to investment, such as inadequate infrastructure, services or housing, or a poor environment*". As such, reducing any potential barriers to private sector investment in the modern economy, including planning constraints, infrastructure connections, and providing incentives, may form a central priority of Mansfield's emerging economic strategy and overarching policy landscape.
- 6.118 In summary, this report highlights the economic potential of Mansfield to leverage opportunities across the modern economy, with some comparative advantage in the freight

⁶⁶ [Key Sectors](#) | [We Are Mansfield](#) | [We Are Mansfield](#)

and logistics-related industries, primarily relating to smaller business with one or two very notable exceptions.

- 6.119 To meet the requirements of the NPPF²⁴, the plan-making process will need to consider how it can most effectively encourage these emerging sectors to grow further through the identification of suitable development sites. A combination of evidence, including a detailed review of land suitable for development, in combination with relevant economic evidence, could release land for the modern economy, in turn supporting economic prosperity at the local level. This will enable growth within the freight and logistics sector – and the District’s economy – by ensuring both the quantity and quality of the supply of premises for this sector can keep pace with the evolving requirements of industry over the next decade.

7.0 Demand/Supply Balance

Supply Overview

- 7.1 The previous ELNS relating to the Mansfield District (as well as the other Nottinghamshire HMA authorities) was undertaken in 2021. It referred to Table 6.3 of the adopted 2020 Mansfield District Local Plan, which set out the forward supply of employment land as of 1st April 2019. At that point in time, it indicated that the District had a forward supply of 50.73 ha of employment land (excluding the 2.82 ha already developed over the plan period to date). This represented an increase of 15.53 ha on the supply position on 31st March 2018 (35.2 ha) due to the inclusion of 5 large Local Plan allocations in the intervening period.

Table 7.1 Employment Land Provision

Plan Period Employment Land Target ha 2013-2020	2019 Local Plan Employment Land (ha) Position	2018 AMR Employment Land (ha) Position
Local Plan Target	41*	n/a
Total amount of floorspace /employment land developed between 1/4/13 and 1/4/19	2.82	2.38
Loss of employment land 2013/2019	-0.98	-0.94
Sites with planning permission	23.83	24.65
Local Plan allocations	17.95	n/a
<i>Pleasley Hill Farm - SUE 1</i>	<i>1.76</i>	<i>-</i>
<i>Land off Jubilee Way - SUE 2</i>	<i>1.6</i>	<i>-</i>
<i>Ratcher Hill Quarry Employment Area - E2a</i>	<i>3.45</i>	<i>-</i>
<i>Oakfield Lane, Market Warsop - E2b</i>	<i>2.2</i>	<i>-</i>
<i>Penniment Farm - E2c</i>	<i>9</i>	<i>-</i>
Sites Available on Key and General Employment Areas	8.95	10.55
TOTAL Available as of 31st March 2019	50.73 ha	35.2 ha

Source: Mansfield District Local Plan 2020 / MDC Employment Monitoring Reports

*38ha of B1c/B2 and B8 land and 3ha of employment land for B1a office space

- 7.2 We have revisited this analysis using the latest data provided by MDC Officers and using the latest 2024 Employment Land Monitoring report.
- 7.3 At the outset, it is important to note that the base date for this analysis is 2023, therefore the data should also factor in the delivery of employment land in the 2023/24 monitoring year. As set out in Section 4.0, Mansfield saw a net loss of **-172 sqm of office floorspace, and a net gain of 0.752 ha of industrial land (3,008 sqm of floorspace) over the past year.**
- 7.4 Going forward, the 2024 Employment Land Monitoring Report notes that there is currently a net gain of **0.31 ha** of industrial land currently under construction (as of 31st March 2024), across four sites as summarised in Table 7.2.

Table 7.2 Industrial land under construction in Mansfield District (2024)

Site name / Planning App Reference / Type	Use Class	Total under construction (ha)
Mason House, Unit 10a, Enterprise Road (2021/0663/FUL) / Extension	B2	0.212
Units 4-7 Oakwood Road, NG18 3HQ (2023/0430/FUL) / New Development	E(g)(iii)	0.007
Land adj 6 Sherwood Street, Mansfield Woodhouse (2020/0360/FUL) / New Development	E(g)(iii)	0.088
89 Leeming Lane South, Mansfield Woodhouse, NG19 9BD (2023/0275/FUL) / New Development	B8	0.003
TOTAL		0.31

Source: Mansfield District Council (2024) Employment Land Monitoring Report 2023/24, Table 8

7.5

As for extant planning permissions for employment land / losses of employment land to alternative uses, the 2024 Monitoring Report indicates that these total a net loss of 468 sqm of office floorspace across 5 live planning permissions (two of which would result in a net gain of floorspace, equal to 312 sqm, with the remaining three resulting in a loss of 780 sqm). It also indicates that there is a **net 1.624 ha of industrial land in the pipeline across 13 sites** (of which 4 would result in a net loss of land, totalling -0.311 ha, with the remaining 9 sites providing +1.309 ha) as summarised in Table 7.3.

Table 7.3 Live planning permissions in Mansfield District (2024)

Site name / Planning App Reference / Type	Use Class	Total net change (sqm / ha)
Land at Samuel Brunts Way (2022/0293/OUT) / New Development (Outline)	Office (E(g)(i))	+280 sqm
17 St John Street (2023/0427/COU) / Change of use	Office (E(g)(i))	-162 sqm
125 Moor Street, Mansfield (2020/0559/FUL) / New Development (Full)	Office (E(g)(i))	+32 sqm
31 Market Place (2021/0090/PNSCUO) / Change of use	Office (E(g)(i))	-88 sqm
Bromley Croft, Unit 1 Oxclose Lane (2021/0537/COU) / Change of use	Office (E(g)(i))	-530 sqm
TOTAL Office		-468 sqm
Land at Pleasley Hill Farm, Water Lane (2020/0169/OUT) / New Development (Outline)	Mixed Industrial	+1.74 ha
Savannah Trading, Maunside, (2023/0240/FUL) / New Development (Full)	B8	+0.06 ha
Robin Hood House, Strawberry Way, (2023/0458/COU) / Change of use	B8	0 ha
27 Ley Lane (2020/0353/FUL) / New Development (Full)	B2	-0.027 ha
Rear of 40a, Mansfield Road, Spion Kop (2020/0620/FUL) / New Development (Full)	E(g)(iii)	-0.03 ha
Plot 6 Mansfield Brick, Crown Farm Way (2020/0156/FUL) / New Development (Full)	B2	+0.022 ha
Easihire Ltd, Kestral Road (021/0736/FUL) / New Development (Full)	B8	+0.016 ha
Land at Maunside (2022/0359/COU) / Change of Use	Mixed Industrial	0 ha
Unit 1b, Brunt Street (2021/0132/FUL) / New Development (Full)	E(g)(iii)	+0.017 ha
52 Ratcliffe Gate (2023/0253/FUL) / New Development (Full)	Mixed Industrial	+0.033 ha

Site name / Planning App Reference / Type	Use Class	Total net change (sqm / ha)
Former ATS Eastern Ltd, Great Central Road, (2022/0518/COU) / Change of Use	B8	-0.014 ha
Berry Hill Foods, Enterprise Road (2022/0270/FUL) / Extension	E(g)(iii)	+0.047 ha
Linney Group Limited, Tw 4 Bellamy Road, (2024/0084/PNSDM)	B8	-0.24 ha NOTE: this relates to the prior approval for the demolition of an existing 2,348 sqm warehouse, to be replaced by an 8,293 sqm warehouse (see 2024/0083/FUL below)
TOTAL Industrial		+1.624 ha

Source: Mansfield District Council (2024) Employment Land Monitoring Report 2023/24, Tables 9 and 10

7.6

Although the 2025 version of MDC's Employment Land Monitoring Report was unavailable at the time of writing, officers provided a list of further commitments that remain extant as of August 2025. These are listed in Table 7.4 and, in addition to the seven sites with extant permission already recorded in the 2024 AMR (Table 7.3 above) **total 7,085 sqm (0.709 ha)** across four sites, two of which are for B8 and two for B2 industrial:

Table 7.4 Pipeline of commitments of employment land/floorspace and overall supply (in sqm), as of August 2025

Site Address	Planning App Ref	Allocation?	Under Construction	Use Class	Floorspace (sqm) / Land
Linney Group Limited, 4 Bellamy Road	2024/0083/FUL	E3m	Y	B8	5,945 sqm* / 0.595 (net)
Compound 8, Ratcher Hill Quarry	2024/0727/FUL	E2c	N	B8	440 sqm / 0.044 ha
Mansfield Brick, Crown Farm Way	2024/0679/FUL	E3j	N	B2	500 sqm / 0.05 ha
Alpa Uk Ltd, Hamilton Way	2024/0550/FUL	E3o	N	B2	200 sqm / 0.02 ha

Source: Mansfield District Council Planning Officers (August 2025).

*Note: according to the application form, this site would result in the loss of 2,348 sqm of existing GIA B8 floorspace (see 2024/0084/PNSDM in Table above), the development of 8,293 sqm and the resultant net gain of 5,945 sqm overall.

7.7

The 2024 Employment Land Monitoring Report also identifies a number of plots that are available on existing sites in key employment areas in the Mansfield District. As can be seen in Table 7.5, these 9 sites could potentially **provide a further 7.54 ha of employment land** over the coming years.

Table 7.5 Plots available in Key Employment Areas in Mansfield District (2024)

Site Name	Land Available (ha)
Oakham Business Park (Site A) – E3d	0.17
Oakham Business Park (Site B) – E3d	0.22
Crown Farm Industrial Estate (Site A) – E3j	2.77
Sherwood Oaks Business Park – E3b	1.68
Sherwood Business Park (Site A) – E3r	0.51
Sherwood Business Park (Site B) – E3r	0.27
Millennium Business Park (Site A) – E3c	0.32
Ransom Wood Business Park (Site A) – E3l	1.34
Ransom Wood Business Park (Site B) – E3l	0.26
Total	7.54

Source: Mansfield District Council (2024) Employment Land Monitoring Report 2023/24, Table 12

- 7.8 Alongside existing employment areas, allocated employment sites and other commitments, the Mansfield District Local Plan 2013-2033 also identified three sites specifically for employment use alongside three Sustainable Urban Extensions [SUEs], which were intended to deliver a mix of uses including employment land.
- 7.9 According to the latest 2024 Employment Land Monitoring Report (2024), the current state of play for these sites is as follows (Table 7.6):

Table 7.6 Employment Land Provision on Allocated Employment Sites /SUEs in Mansfield District (2024)

Plan Period Employment Land Target ha 2013-2020	Local Plan Employment Land (ha) Position	2024 Position	Comments
<i>Pleasley Hill Farm – SUE 1</i>	<i>1.76 ha</i>	1.74 ha	Outline application - 2020/0169/OUT granted (05/05/2023). Application includes 10.48 ha of employment / commercial land. Planning Statement specifies provision of 3,920 sqm Class E(g); 5,257 sqm B2 and 8,257 sqm B8 (17,434 sqm in total).
<i>Land off Jubilee Way - SUE 2</i>	<i>1.6 ha</i>	1.6 ha	Screening/scoping opinion - 2022/0552/SCOP (21/10/2022). It is noted that a hybrid application for this site has now been received by MDC (2025/0360/OUT) for: (a) full application for site restoration and remediation, landscaping, drainage, expansion of Mansfield rugby club, access improvements to Sherwood Forest Golf Club, engineering works including the creation of development platforms, point of access including the core spine road through the SUE and associated works and (b) outline application for up to 800 dwellings, up to 6 ha of employment, retail and commercial uses, neighbourhood centre, later living and residential institutions, land reserved for primary school, public open space, connectivity improvements and associated works.
<i>Land at Berry Hill Farm – SUE 3</i>	<i>18.8 ha</i>	17.2 ha	Outline application - 2010/0089/ST (17/04/2013) - application included 18.8 ha of employment land Masterplan (2017/0064/CON) shows employment land to be developed across multiple plots. Discharge of condition (2019/0479/CON) shows a revised masterplan with 17.2 ha of employment land. Housing aspect of this development is well underway and delivering; the employment side is expected to be delivered in later phases.

Plan Period Employment Land Target ha 2013-2020	Local Plan Employment Land (ha) Position	2024 Position	Comments
			<i>Note: the outline application for SUE3 has now lapsed.</i>
<i>Ratcher Hill Quarry Employment Area - E2a</i>	<i>3.45 ha</i>	3.45 ha	Application granted in October 2021 (2021/0347/FUL) for a 0.9 ha replacement coating plant. Delivery post 2025
<i>Oakfield Lane, Market Warsop - E2b</i>	<i>2.2 ha</i>	2.2 ha	No application yet submitted. Delivery post 2025.
<i>Penniment Farm - E2c</i>	<i>9.0 ha</i>	9.0 ha	The first phase of residential has been completed with further phases yet to come forward. An application was submitted for the employment aspect for this site and went to planning committee on 12 February 2024. The application was resolved to be granted planning permission subject to s106.

Source: Mansfield District Local Plan 2020 / MDC Employment Monitoring Report 2024

7.10 This indicates that as of 2024, the three SUEs could potentially deliver up to 20.54 ha of employment land, with a further 14.65 ha on the three employment allocations from the existing Local Plan (i.e. 35.19 ha in total).

7.11 Bringing all of these sources of potential employment land commitments/allocations together in Table 7.7 suggests that with a base date of 31st March 2023 (to match the emerging Local Plan's base date and that of the forecasting work), Mansfield District has up to **44.561 ha** of employment land available:

Table 7.7 Employment Land Supply in Mansfield District as of 31st March 2023

Source	Land Available as of 31 st March 2023 (ha)
Net Office floorspace completions 2023/24	-172 ha / -0.0172 ha
Net Industrial land completions 2023/24	+0.752 ha
Net Office land under construction (as of March 31 st 2024)	0.0 ha
Net Industrial land under construction (as of March 31 st 2024)	+0.31 ha
Extant Office planning permissions (Net)	-468 sqm / -0.0468 ha
Extant Industrial planning permissions (Net)	+2.573 ha*
Plots available in Key Employment Areas	+7.54 ha
Pleasley Hill Farm - SUE 1	n/a (1.74 ha already included in extant industrial planning permissions above)
Land off Jubilee Way - SUE 2	+1.6 ha
Land at Berry Hill Farm – SUE 3	+17.2 ha
Ratcher Hill Quarry Employment Area - E2a	+3.45 ha
Oakfield Lane, Market Warsop - E2b	+2.2 ha
Penniment Farm - E2c	+9.0 ha
TOTAL	+44.561 ha

Source: Mansfield District Council (2024) Employment Land Monitoring Report 2023/24, MDC Officers, Lichfield's Analysis. * Note: regarding the Linney Group Limited site (2024/0084/PNSDM and 2024/0083/FUL), the -0.24 ha in Table 7.3 has been excluded to avoid double counting, as the +0.595 ha figure in Table 7.4 has already netted this off.

7.12 The demand side assessment indicates that Mansfield District requires **between 27.17 ha and 52.09 ha** of employment land over the 20-year plan period to 2043 (translating the office floorspace to land for the purposes of this exercise by applying a plot ratio of 40%).

This is a higher and broader range than the need figures from the 2021 ELNS of 28.3 ha to 35.7 ha.

7.13

The forward supply of 44.56 ha would, in strictly quantitative terms, appear to be of a more than sufficient scale to meet all of these scenarios with the exception of the SM3 High Growth scenario, which would have a -7.53 ha shortfall, and also (albeit to a lesser extent) the Past Net Absorption scenario, which would have a -3.47 ha shortfall.

Table 7.8 Demand / Supply Balance in Mansfield District as of 31st March 2023

Demand Scenario	Office Requirement 2023-2043 (sqm)	Industrial / Warehousing Requirement (ha)	TOTAL (converting office sqm to ha)	Total Supply (ha)	Demand / Supply Balance (ha)
1) Experian June 2025 Baseline	42,647	26.19	36.86	44.56	+7.70
2) Regeneration	45,585	29.66	41.06	44.56	+3.50
3a) SM3 High Job Growth	50,881	39.37	52.09	44.56	-7.53
3b) SM3 Low Job Growth	44,130	28.57	39.60	44.56	+4.96
4)a Past Delivery	7,928	25.18	27.17	44.56	+17.39
4)b Past Net Absorption	55,136	34.24	48.03	44.56	-3.47

Source: Lichfields analysis / Mansfield District Council (2025)

7.14

It should be noted that this demand-supply balance analysis assumes that all outstanding planning permissions and the identified capacity on allocations will come forward in full during the Local Plan Review period. Any deviation from this assumption could potentially have an effect on the balance of space within Mansfield to 2043.

7.15

In addition, it is stressed again that the forecasting approach in this ELR Update has focused on indigenous employment land needs. An assessment of the need for strategic employment floorspace that serves a geographical area extending beyond the District's own boundaries was outside the scope of work. For example, this would include larger-scale strategic distribution needs serving the wider region, which has been addressed separately in Icen's 2022 Nottinghamshire Core & Outer HMA Logistics Study referred to above.

8.0 Conclusions and Recommendations

- 8.1 The ELRU has been undertaken to update the 2021 ELNS for Mansfield District. It is intended to align with the requirements of the NPPF24 and accompanying PPG, as well as taking into account the recommendations of the Nottinghamshire Core and Outer HMA Logistics Study (August 2022). The focus is on the employment land needs of the District over the period 2023-2043. The site-by-site supply analysis has not been revisited as part of this ELRU, although an overall figure of the Council's current portfolio of committed and allocated sites was provided, based on MDC's latest Monitoring data.
- 8.2 The key conclusions of the analysis are summarised below.

Future Employment Needs

- 8.3 Lichfields undertook a detailed analysis of employment land needs in the District, beginning with an overview of the current economic context, supported by discussions with key stakeholders and local commercial agents. Consultations with key stakeholders and agents highlighted that there was a shortage of available employment land available in the District, particularly of the type and quality required by industrial companies. This has forced many businesses into leasing poorer quality, older stock which restricts business growth and investment. Conversely, agents also noted that despite low vacancy rates for office space in the District there was limited demand for new commercial floorspace due in part to a sharp increase in levels of hybrid working, with a 'flight to quality' seeing many businesses either relocating out of larger towns or cities (notably Nottingham) or downsizing their floorplate.
- 8.4 Whilst general market activity was holding up in 2025 despite ongoing national economic uncertainty, agents feared that the market would continue to be slow until early-to-mid 2026, once businesses had re-assessed economic conditions post-budget.
- 8.5 This qualitative analysis was supplemented by an updated quantitative economic development needs assessment exercise. In line with the requirements of the PPG, Lichfields modelled a range of scenarios including:
- Baseline employment forecasts (**Labour Demand**), using Experian's Local Market Quarterly Forecast for June 2025;
 - An **Economic Growth** projection which considered in more detail the key growth sectors identified in the LEP's SEP and discussion with key stakeholders and the Council's EDO;
 - A demographically-derived assessment of growth in the **Labour Supply**. This stage involved translating forecasts of population growth based on planned housing levels (based on the Council's latest Housing Needs Study); and,
 - Consideration of **past trends** in completions of employment space based on monitoring data collected by the Council as well as net absorption rates from the CoStar database, and how these trends might change in the future.

8.6 In summary, the demand-led range of total gross land requirements to 2043, factoring in a 2-year margin of choice and loss replacement, results in the following demand projections for Mansfield District:

- 1 **Econometric demand-led projections: Office: 42,647 sqm–45,585 sqm; Industrial / Warehousing: 26.19 ha–29.66 ha;**
- 2 **Labour Supply projections: Office: 44,130 sqm–50,881 sqm; Industrial / Warehousing: 28.57 ha–39.37 ha; and,**
- 3 **Past Development Trends: Office: 7,928 sqm–55,136 sqm; Industrial / Warehousing: 25.18 ha–34.24 ha.**

Table 8.1 Mansfield District Gross Employment Land Requirements 2023-2043

		Offices / R&D (sqm)	Light Industrial (ha)	General Industrial (ha)	Warehousing (ha)	Total Industrial / Warehousing (ha)
1) Experian June 2025 Baseline	Net	13,774	6.63	1.25	4.03	11.91
	+ Flexibility Factor	15,467	6.94	1.47	4.60	13.00
	+ Loss Replacement	42,647	9.95	7.94	8.31	26.19
2) Regeneration	Net	16,712	6.63	1.44	7.31	15.38
	+ Flexibility Factor	18,405	6.94	1.66	7.87	16.47
	+ Loss Replacement	45,585	9.95	8.14	11.58	29.66
3a) SM3 High Job Growth	Net	22,008	9.88	5.77	9.44	25.09
	+ Flexibility Factor	23,701	10.19	5.99	10.00	26.18
	+ Loss Replacement	50,881	13.20	12.46	13.71	39.37
3b) SM3 Low Job Growth	Net	15,257	7.21	2.06	5.01	14.28
	+ Flexibility Factor	16,950	7.52	2.28	5.57	15.37
	+ Loss Replacement	44,130	10.53	8.76	9.28	28.57
4)a Past Delivery	Net	-20,945	3.09	2.18	5.62	10.90
	+ Flexibility Factor	-19,252	3.40	2.40	6.19	11.99
	+ Loss Replacement	7,928	6.41	8.87	9.90	25.18
4)b Past Net Absorption Trend	Net	26,263	n/a	n/a	n/a	19.96
	+ Flexibility Factor	27,956	n/a	n/a	n/a	21.05
	+ Loss Replacement	55,136	n/a	n/a	n/a	34.24

Source: Lichfields analysis

8.7 The scenarios range from a low of 7,928 sqm office / 25.18 ha industrial (Scenario 4 Past Take Up) to the Scenario 3a SM3 High Job Growth figures of 50,881sqm / 39.37 ha (noting that the Past Net Absorption Trend scenario has a slightly higher office floorspace requirement of 55,136 sqm, albeit a lower overall figure once the industrial requirement is included).

- 8.8 This ELRU has looked purely at indigenous employment land needs and has not considered the need for strategic logistics floorspace that serves a geographical area extending beyond the District's own boundaries, given this is already addressed by Icen's 2022 Nottinghamshire Core & Outer HMA Logistics Study.

Meeting the Needs of the Modern Economy

- 8.9 This report has sought to establish the current level of representation of the modern economy within the Mansfield economy, identifying where there is growth potential, and how local economic growth and development can be supported.
- 8.10 The NPPF⁶⁷ introduced the concept of planning for a 'modern economy' (Paragraph 86c), requiring planning policy and decisions to facilitate and enable development of laboratories, gigafactories, and digital infrastructure including data centres, to support the growth of the modern economy, in addition to recognising the evolving requirements of freight and logistics. Furthermore, the UK Industrial Strategy⁶⁸ sets out the growth-driving sectors (known as the IS-8) of the national economy, highlighting the importance of (among others) advanced manufacturing, digital and technologies, and life sciences, which align with the modern economy uses identified in the NPPF²⁴.
- 8.11 As part of building a strong, competitive economy in Mansfield, planning policy should focus on the spatial and locational requirements of both established and emerging industries. Within Mansfield, there is evidence of existing activity within freight and logistic-related sectors; however, the majority of this activity is within smaller Tier 2 supply chain businesses (with a handful of exceptions such as Bowring Transport). Although Mansfield is likely to remain a secondary freight and logistics location compared to other parts of Nottinghamshire with better access and proximity to the SRN, the District therefore continues to perform an important role for smaller businesses involved in the supply chain.
- 8.12 There are no large data centres or gigafactories within Mansfield, with limited activity in the wider Nottinghamshire area and no planned centres, and relatively limited activity within related sectors.
- 8.13 Our assessment therefore demonstrates a low level of comparative advantage relative to other English local authorities in most of the modern economy sectors, including laboratories, gigafactories and digital infrastructure. As noted above, there is a high comparative advantage in the freight and logistics sector, which is driven by demand factors and some level of comparative advantage in logistics, notwithstanding the challenge around motorway connectivity and the absence of any rail freight terminals or other major logistics hubs in the vicinity.
- 8.14 Facilities and infrastructure to support the freight and logistics industry should of course be recognised for their critical role as an enabler of growth in the local economy. However, given that other parts of Nottinghamshire are more favourably located from a logistics perspective than Mansfield to contribute towards meeting wider strategic needs, it is likely

⁶⁷ MHCLG (2024) National Planning Policy Framework. Available at: <https://www.gov.uk/government/publications/national-planning-policy-framework-2> [Accessed September 2025]

⁶⁸ DBT (2025) The UK's Modern Industrial Strategy. Available at: <https://www.gov.uk/government/collections/the-uks-modern-industrial-strategy-2025> [Accessed September 2025]

that Mansfield District's role may be more limited than elsewhere. That said, Mansfield will still have a role to play and there appears market demand to deliver logistics units predominantly in the southernmost reaches of the District on well located, sustainable sites.

- 8.15 A Statement of Common Ground in relation to the Greater Nottingham Strategic Plan currently circulating between the constituent LPAs regarding the potential distribution of this unmet logistics need. It recognises that within Mansfield District there are limited opportunities to deliver strategic distribution, but the area would contribute towards meeting non-strategic need. It will be for the Council(s) to agree the extent to which Mansfield should contribute significantly towards meeting that need moving forward.
- 8.16 In general, the industry outlook for the modern economy sectors at the national level is overwhelmingly positive, reflecting their capacity to drive long-term economic growth. There is evidence of strong demand for the outputs of all sectors nationally, which will have implications on the pattern of commercial and employment development across the country. Whilst the above position might not indicate that Mansfield is particularly likely, or will be well placed, to meet the needs of all of these industries in the short-to-medium term, it is nevertheless important that the Council adopt a pro-active, positive approach to planning for the modern economy and critical enabling development (i.e. infrastructure and housing).
- 8.17 Based on the findings of this report, it is concluded that the existing clusters or future growth potential of the modern economy sectors would not influence the existing Outer Nottingham FEMA. While some activities (such as the burgeoning data centres market), may encroach across into the existing FEMA boundary, it is not considered that future growth of these clusters would fundamentally alter Mansfield's economic geography.
- 8.18 Given the present economic uncertainty and rapidly evolving industrial drivers for the future, MDC's plan-making process will need to consider how it can most effectively encourage these emerging sectors to grow in future, albeit from a low base. A combination of evidence, including a detailed review of land suitable for development, in combination with relevant economic evidence, could release land for the modern economy in the longer term, in turn supporting economic prosperity at the local level.
- 8.19 While the focus of this report has been primarily placed upon paragraph 86c of the NPPF²⁴ regarding considering the needs of the modern economy, it is pertinent to consider paragraph 86d, which states that planning policies should "*seek to address potential barriers to investment, such as inadequate infrastructure, services or housing, or a poor environment*". As such, reducing any potential barriers to private sector investment in the modern economy, including planning constraints, infrastructure connections, and providing incentives, may form a central priority of Mansfield's economic strategy and overarching policy landscape in its emerging Local Plan Review.

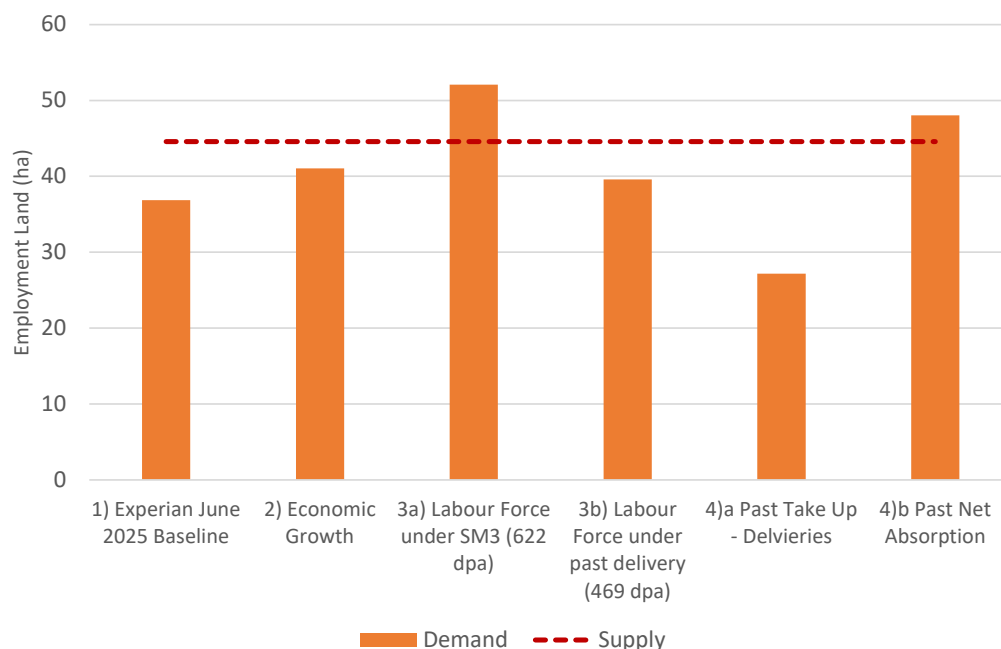
Demand / Supply Balance

- 8.20 An analysis of the existing and emerging employment pipeline comprising undeveloped allocations and employment sites with extant planning permission – with a base date of March 31st 2023 to align with the demand forecasting work – indicates that there is a total of 44.56 ha of employment land available in Mansfield District. The vast majority of this relates to industrial land, and includes 2.57 ha with extant planning permission, 7.54 ha

relating to plots available in Key Employment Areas, and 33.45 ha of undeveloped land across 6 existing allocations in the adopted Mansfield Local Plan.

- 8.21 The demand side assessment indicates that the Mansfield District requires between 27.17 ha and 52.09 ha of employment land over the 20-year plan period to 2043 (translating the office floorspace to land for the purposes of this exercise by applying a plot ratio of 40%). This is a higher and broader range than the need figures from the 2021 ELNS of 28.3 ha to 35.7 ha.
- 8.22 The forward supply of 44.56 ha would therefore, in strictly quantitative terms, appear to be of a more than sufficient scale to meet all of these scenarios with the exception of the SM3 High Growth scenario, which would have a -7.53 ha shortfall, and to a lesser extent, the Past Net Absorption scenario, which would have a -3.47 ha shortfall (Figure 8.1).

Figure 8.1 Demand / Supply Balance in Mansfield District 2023-2043



Source: Lichfields / MDC

- 8.23 The qualitative analysis has also indicated that there is a shortage of industrial and warehousing floorspace across the District. Should the Council aim to meet the employment space requirements outlined in Scenario 3a to more closely align employment requirements with increases in housing numbers, new industrial and distribution land would need to be identified to 2043.
- 8.24 In addition, it is reiterated that the forecasting approach in this ELR Update has focused on indigenous employment land needs. An assessment of the need for strategic employment floorspace that serves a geographical area extending beyond the District's own boundaries was outside the scope of work. For example, this would include larger-scale strategic distribution needs serving the wider region, which has been addressed separately in the Icen Nottinghamshire Core & Outer HMA Logistics Study referred to above. Any wider strategic B2/B8 requirements would be in addition to the localised needs set out above.

- 8.25 As identified within this ELRU, additional industrial and distribution floorspace will be required (at the upper end of the range) across Mansfield to support a range of businesses and to effectively serve consumers. The locations of these units will be influenced by transport accessibility, land supply and land availability. In relation to the modern economy, however, an emerging focus may be the retrofit of some of Mansfield's older class B8 stock, using technological improvements to drive efficiency gains and extend their lifespan, and in turn making best use of existing land.
- 8.26 More broadly, in considering which sites could be most suitable for allocation, the Council should ideally seek to identify a mix of locations across the District, and site opportunities that can support a mix of employment uses, to provide some flexibility and also to respond to market demand. Furthermore, policy should have regard to the needs of the modern economy, in particular the freight sector as Mansfield's primary comparative advantage (notwithstanding the commentary above regarding the District's more modest role relative to the other Nottinghamshire districts), to provide the foundations for future economic growth in the District.
- 8.27 To support delivery, future policy should also identify the need for infrastructure improvements across the Key Employment Areas and future allocations to support intensification opportunities on employment land where appropriate.

Appendix 1 Tier 1 and Tier 2 modern economy sector definitions

Industry	Tier 1 sectors	Tier 2 sectors (supply chain)
Laboratories	72.1: Research and experimental development on natural sciences and engineering	85.1: Pre-primary education 85.2: Primary education 85.3: Secondary education 85.4: Higher education 85.5: Other education 85.6: Educational support activities 62.0: Computer programming, consultancy and related activities 29.1: Manufacture of motor vehicles 29.2: Manufacture of bodies (coachwork) for motor vehicles; manufacture of trailers and semitrailers 29.3: Manufacture of parts and accessories for motor vehicles 70.1: Activities of head offices 70.2: Management consultancy activities 46.1: Wholesale on a fee or contract basis 46.2: Wholesale of agricultural raw materials and live animals 46.3: Wholesale of food, beverages and tobacco 46.4: Wholesale of household goods 46.5: Wholesale of information and communication equipment 46.6: Wholesale of other machinery, equipment and supplies 46.7: Other specialised wholesale 46.9: Non-specialised wholesale trade 84.1: Administration of the State and the economic and social policy of the community 84.2: Provision of services to the community as a whole 84.3: Compulsory social security activities 74.1: Specialised design activities 74.2: Photographic activities 74.3: Translation and interpretation activities 74.9: Other professional, scientific and technical activities n.e.c. 71.1: Architectural and engineering activities and related technical consultancy 71.2: Technical testing and analysis 73.1: Advertising 73.2: Market research and public opinion polling

Industry	Tier 1 sectors	Tier 2 sectors (supply chain)
Gigafactories	27.2: Manufacture of batteries and accumulators 29.1: Manufacture of motor vehicles	46.1: Wholesale on a fee or contract basis 46.5: Wholesale of information and communication equipment 46.6: Wholesale of other machinery, equipment and supplies 46.7: Other specialised wholesale 46.9: Non-specialised wholesale trade 64.1: Monetary intermediation 64.2: Activities of holding companies 64.3: Trusts, funds and similar financial entities 64.9: Other financial service activities, except insurance and pension funding 47.1: Retail sale in non-specialised stores 47.4: Retail sale of information and communication equipment in specialised stores 47.5: Retail sale of other household equipment in specialised stores 47.7: Retail sale of other goods in specialised stores 28.1: Manufacture of general purpose machinery 28.2: Manufacture of other general-purpose machinery 28.4: Manufacture of metal forming machinery and machine tools 28.9: Manufacture of other special-purpose machinery 53.1: Postal activities under universal service obligation 53.2: Other postal and courier activities 26.1: Manufacture of electronic components and boards 26.2: Manufacture of computers and peripheral equipment 26.3: Manufacture of communication equipment 26.4: Manufacture of consumer electronics 26.5: Manufacture of instruments and appliances for measuring, testing and navigation; watches and clocks 26.6: Manufacture of irradiation, electromedical and electrotherapeutic equipment 26.7: Manufacture of optical instruments and photographic equipment 26.8: Manufacture of magnetic and optical media 24.1: Manufacture of basic iron and steel and of ferro-alloys 24.2: Manufacture of tubes, pipes, hollow profiles and related fittings, of steel 24.3: Manufacture of other products of first processing of steel 25.1: Manufacture of structural metal products 25.2: Manufacture of tanks, reservoirs and containers of metal 25.3: Manufacture of steam generators, except central heating hot water boilers 25.5: Forging, pressing, stamping and roll-forming of metal; powder metallurgy 25.6: Treatment and coating of metals; machining 25.7: Manufacture of cutlery, tools and general hardware 25.9: Manufacture of other fabricated metal products 62.0: Computer programming, consultancy and related activities 49.1: Passenger rail transport, interurban 49.2: Freight rail transport 49.3: Other passenger land transport 49.4: Freight transport by road and removal services 49.5: Transport via pipeline

Industry	Tier 1 sectors	Tier 2 sectors (supply chain)
Digital Infrastructure	63.1: Data processing, hosting and related activities; web portals	70.1: Activities of head offices 70.2: Management consultancy activities 69.1: Legal activities 73.1: Advertising 73.2: Market research and public opinion polling 35.1: Electric power generation, transmission and distribution 63.9: Other information service activities 69.2: Accounting, bookkeeping and auditing activities; tax consultancy 81.1: Combined facilities support activities 53.1: Postal activities under universal service obligation 53.2: Other postal and courier activities 61.1: Wired telecommunications activities 61.2: Wireless telecommunications activities 61.3: Satellite telecommunications activities 61.9: Other telecommunications activities
Freight	49.2: Freight rail transport 49.4: Freight transport by road and removal services 50.2: Sea and coastal freight water transport 50.4: Inland freight water transport 51.2: Freight air transport and space transport	52.1: Warehousing and storage 52.2: Support activities for transportation 49.1: Passenger rail transport, interurban 49.2: Freight rail transport 77.1: Renting and leasing of motor vehicles 77.3: Renting and leasing of other machinery, equipment and tangible goods 19.1: Manufacture of coke oven products 19.2: Manufacture of refined petroleum products 49.3: Other passenger land transport 49.4: Freight transport by road and removal services 49.5: Transport via pipeline 51.1: Passenger air transport 51.2: Freight air transport and space transport 50.1: Sea and coastal passenger water transport 50.2: Sea and coastal freight water transport 50.3: Inland passenger water transport 50.4: Inland freight water transport 46.1: Wholesale on a fee or contract basis 46.2: Wholesale of agricultural raw materials and live animals 46.3: Wholesale of food, beverages and tobacco 46.4: Wholesale of household goods 46.5: Wholesale of information and communication equipment 46.6: Wholesale of other machinery, equipment and supplies 46.7: Other specialised wholesale 46.9: Non-specialised wholesale trade 78.1: Activities of employment placement agencies 78.2: Temporary employment agency activities 78.3: Other human resources provision 64.1: Monetary intermediation 64.2: Activities of holding companies 64.3: Trusts, funds and similar financial entities 64.9: Other financial service activities, except insurance and pension funding

Industry	Tier 1 sectors	Tier 2 sectors (supply chain)
Logistics	52.1: Warehousing and storage 52.2: Support activities for transportation	78.1: Activities of employment placement agencies 78.2: Temporary employment agency activities 78.3: Other human resources provision 64.1: Monetary intermediation 64.2: Activities of holding companies 64.3: Trusts, funds and similar financial entities 64.9: Other financial service activities, except insurance and pension funding 51.1: Passenger air transport 51.2: Freight air transport and space transport 49.3: Other passenger land transport 49.4: Freight transport by road and removal services 49.5: Transport via pipeline 68.1: Buying and selling of own real estate 68.2: Renting and operating of own or leased real estate 19.1: Manufacture of coke oven products 19.2: Manufacture of refined petroleum products 77.1: Renting and leasing of motor vehicles 77.3: Renting and leasing of other machinery, equipment and tangible goods 82.1: Office administrative and support activities 82.9: Business support service activities n.e.c. 35.1: Electric power generation, transmission and distribution

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