Kirklees Employment Land Study

July 2025

Turley

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Our reference
01331

July 2025

Executive Summary

1. Kirklees Council ('the Council') has commissioned Turley in partnership with Aspinall Verdi to prepare an Employment Land Study (ELS) for the district.

2. The ELS adheres to national policy in providing up-to-date evidence to support the preparation of a new Local Plan, by determining future economic development needs after accounting for the latest employment forecasts, commercial property market signals and the findings of a business survey undertaken in late 2024. While the context for such studies is always evolving, this report has drawn upon the latest information available during the period in which it was prepared, from November 2024 to July 2025, particularly accounting wherever possible for the UK's Modern Industrial Strategy and the Kirklees Inclusive Economy Strategy which were both adopted towards the end of this period. These respectively affirm the Government's clear ambition to grow the economy and outline the existing specialisms in Kirklees – in textiles, advanced precision engineering and health innovation for instance – that will allow the district to play an important role in supporting this agenda, aided by infrastructure investment.

Evolving economic profile

3. The report presents an up-to-date overview of the Kirklees economy, highlighting:

   - **Enduring functional relationships with other parts of the Leeds City Region** (LCR) with a growing majority of the district's residents working in this area. It also supplies the labour that fills most of the jobs that currently exist in Kirklees, albeit the district's residents alone fill around three quarters of these jobs.

   - **Kirklees' success in creating an average of 932 jobs per annum** over the decade to 2023, growing employment levels at an average rate of 0.6% per annum but lagging behind the LCR and country as a whole in this regard, while also falling short of the current Local Plan's ambition of creating some 1,278 jobs per annum over the period to 2031. Performance has also been variable within Kirklees, as although the northern part of the district continues to offer the most jobs it appears to have been creating them at only around half the rate of the south and Huddersfield.

   - **The particular success of five sectors in driving employment growth**, these being manufacturing and human health – which both continue to rank amongst the three largest employers – as well as accommodation and food services; administrative and support services; and transportation and storage. A substantial number of jobs have contrastingly been lost in the wholesale and retail sector, albeit it does still remain the district's largest in employment terms.

   - **The growing business base of Kirklees**, with numbers having increased faster than seen regionally or nationally if slightly lagging behind the LCR. This appears to have been driven by large businesses that have either grown to this size or been attracted from elsewhere, since there has been less growth in the number

of medium-sized businesses employing 50-249 people. The vast majority of businesses do though remain micro in scale, employing fewer than ten people.

- **Rising economic participation** amongst the working age population of Kirklees, with unemployment having also more than halved since the start of the current plan period in 2013. Residents appear to be increasingly qualified with more having degrees or equivalents and fewer having no qualifications.

Changing property market

4. The report subsequently reviews the commercial property market in Kirklees, confirming that:

- **There remain important distinctions between different parts of the district.** North Kirklees is characterised by its connectivity to both the M1 and M62, proximity to the latter also benefitting Huddersfield alongside its strong public transport links that are currently being upgraded. South Kirklees has a more rural character with much of its employment stock more isolated from existing markets and the strategic road network.

- **The offices, industrial premises and warehouses on offer in different parts of Kirklees also vary.** South Kirklees has the least and its stock is generally smaller, aside from its relatively large warehouses. North Kirklees has not only the most premises but also the largest, on average, albeit Huddersfield does offer only slightly fewer and both its warehouses and offices also tend to be slightly larger. The district as a whole does though generally offer premises that are smaller than those typically found within the LCR.

- **Availability rates have generally reduced over the last decade** but do tend to be higher in North Kirklees and in offices in Huddersfield.

- **There has been fluctuation in the amount of industrial space leased in Kirklees**, as well as in the average amount of space typically taken by occupiers, signifying a volatile market that is likely influenced by wider economic conditions. Lettings have been broadly split between the three market areas since 2013, but South Kirklees has recently been meeting a greater share of demand at the apparent expense of North Kirklees. The latter area has though still been responsible for more than half of the industrial *space* taken up, as businesses there have increasingly tended to lease larger premises.

- **There has likewise been fluctuation in the office market**, albeit with a general reduction in the total amount of space being leased. Businesses have generally been favouring smaller premises, possibly due to downsizing or a shift towards more flexible space arrangements. North Kirklees does though appear to have bucked this trend, with the average business having taken over twice as much over the last five years as their contemporaries five years prior. This is despite the area having accommodated an increasingly small share of the district's lettings.

- **The district's existing businesses have made most of the enquiries** received by the Council since March 2019, with the residual third representing potential inward investments. Land and property in Huddersfield has most often been sought but almost as many businesses would have located anywhere in Kirklees, this being particularly prevalent for businesses operating in certain sectors.

Estimating future need

5. The report proceeds to quantify the demand for employment land and floorspace that could be generated in Kirklees over the emerging plan period, using the approaches suggested in Planning Practice Guidance (PPG) – each of which have their own strengths and limitations – and drawing upon the latest available evidence.

6. The use of employment forecasts is encouraged by the PPG, and the Council has agreed with neighbours in the LCR to account for the Regional Econometric Model (REM) in developing their respective Local Plans. The latest iteration suggests that around 12,100 jobs will be created in Kirklees between 2024 and 2043, equivalent to circa 637 jobs per annum, with this not only being around half the number targeted by the current Local Plan (1,278pa) but also nearly a third short of the historic trend over the last decade (932pa). Realisation of this forecast would though improve the historic trend for certain sectors, such as distribution and construction, albeit while bringing job losses in a manufacturing sector that has recently grown.

7. While the REM has long been used in Kirklees and the wider LCR, any such forecast has inherent limitations making it wise to undertake sense checks. It has been established that none of the other leading forecasting houses envisage more jobs being created in Kirklees, with Oxford Economics and Experian forecasting a comparable level of job growth (as would be expected of the latter, where its forecasts ultimately underpin the REM). The other forecasts do though have differing views on the outlook for individual sectors, envisaging the loss of more manufacturing jobs but the creation of more jobs in distribution; financial and business services; other services; and information and communication. There would still remain a marked slowing in the sectors that have recently created the most jobs in Kirklees, namely financial and business services; accommodation and food services; transport and storage; and manufacturing. If these sectors were to keep creating jobs at the recent rate, a specially created variant of the REM suggests that some 1,463 jobs could be created annually in Kirklees, totalling some 27,800 over the emerging plan period (2024-43).

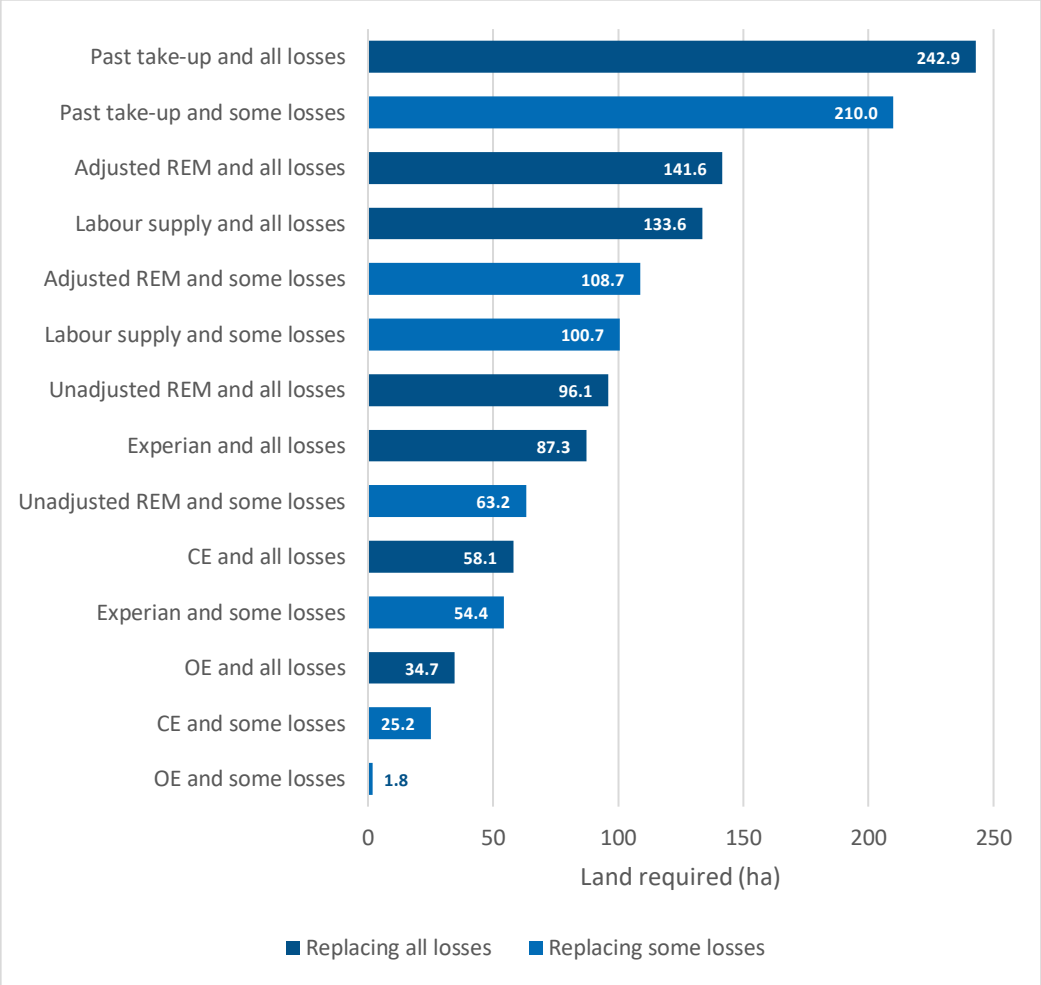
8. The PPG also requires labour supply to be taken into account, and this can be reasonably based on demographic modelling from the Strategic Housing Market Assessment (SHMA) which estimates how the population of Kirklees could change if the minimum housing need suggested by the standard method is met. This indicates that between 1,002 and 1,639 jobs could be supported annually, depending on future household formation rates, with this range notably framing the highest of the estimates introduced above and surpassing all others.

9. Having introduced a range of scenarios, the report proceeds to estimate the land that could be needed to accommodate the number and profile of jobs forecast in each one, by assigning jobs to different types of premises and estimating the amount of space

needed per job. Outcomes have also been compared to a projection of the take-up that the Council has recorded in Kirklees during the current plan period, as recommended by the PPG.

10. This process produces an extremely broad range, with its unique profile of jobs suggesting that **as little as 1.8ha of land** could be needed to support the forecast from Oxford Economics if it is assumed that losses continue at the recent rate and are partially replaced. Conversely, if all are replaced and past take-up continues at the rate seen since 2013, then **some 242.9ha of employment land** could be needed, with even this a potentially conservative estimate where it assumes that offices are developed at relatively high densities.

Figure 1: Total Employment Land Needed by Scenario (hectares; 2024-43)

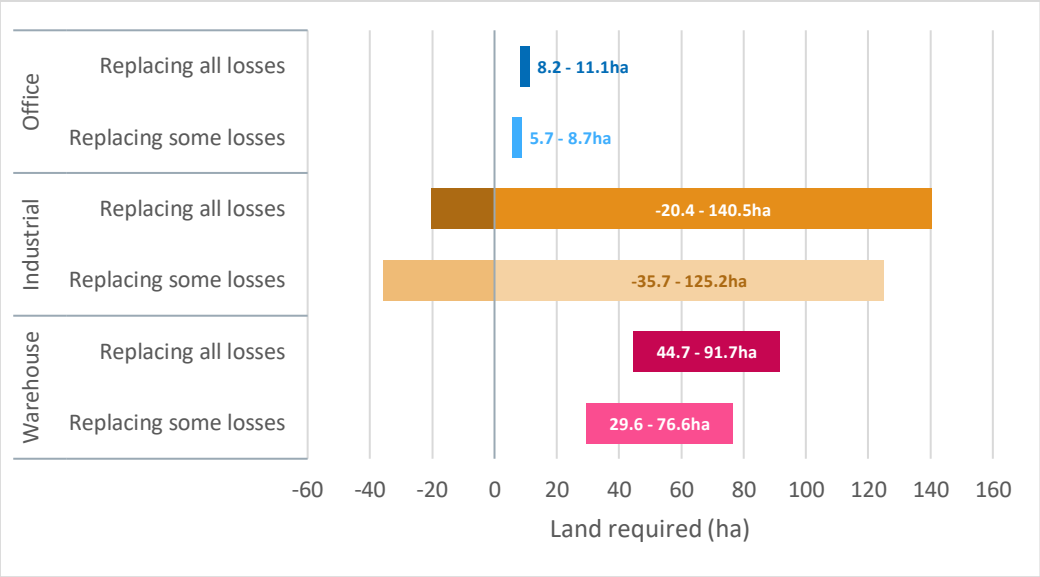


Source: Turley analysis

11. Ranges generally narrow when focusing on particular types of employment land. Circa **5.7-11.1ha** of land suited to offices is implied to be needed – rising up to **41.7ha** if allowance was also made for lower density office schemes – and **29.6-91.7ha** of warehousing land could also be needed. There is a much wider range for industrial land, with some scenarios implying an **oversupply of up to 35.7ha** and others suggesting that **up to 140.5ha of additional land** could be needed. This reflects

uncertainty around whether jobs will be lost, as expected by some forecasting houses, or take-up instead continues at the relatively healthy rate seen in Kirklees.

Figure 2: Range of Employment Land Requirements by Property Type (2024-43)



Source: Turley analysis

Supply of employment land

12. The Council has identified a total of 116 sites for assessment by Aspinall Verdi (AV). Most represent vacant land within the Priority Employment Areas (PEAs) defined by the current Local Plan, but 27 have been drawn from its Employment Land Supply Review (ELSR) and 15 are existing allocations from the current Local Plan.

13. The sites collectively offer **circa 140.31ha** of net developable land, over half of which is in North Kirklees with this area generally offering larger sites than is typical in the district even if the average site is still smaller than in Huddersfield. South Kirklees has sites that are only around half as large, on average.

14. Removing the few sites that AV have found to no longer be available slightly reduces the overall supply, to **circa 138.66ha**.

15. This land is identified as having the potential to accommodate various uses, albeit most is found to be suited to mixed-use schemes. Such developments could offer office space, supplementing the relatively small amount of land (2.66ha) suited only to this use.

16. AV have worked with the Council to develop a criteria-based scoring system that ranks each site based on its likely attractiveness to the market, factoring in market conditions, physical factors and sustainability. This suggests that only around 16ha of land is classed as 'very good' although just over 95ha more is classified as 'good', meaning that a large share of the land supply ranks positively. A further 21ha is deemed 'average'. Sites in North Kirklees and particularly Huddersfield tended to score

highest, whereas sites in South Kirklees – and particularly its ELSR sites – generally received lower scores.

17. A relatively large number of sites (46) – mostly from the ELSR or in PEAs – are classed as 'poor' or indeed 'very poor' but their relatively small size means that this is true of little more than 8ha of the identified land. This nonetheless shows the limitations of these small sites in meeting occupier requirements and satisfying demand within the market.

18. Only three sites offer more than 10ha and could thus be arguably viewed as strategic in nature, albeit AV consider only the largest – an existing 35ha allocation off Leeds Road in Dewsbury – to be truly strategic in scale. The other two such large sites are an existing allocation (in Cleckheaton) and a PEA that is in single ownership but deemed too far from the strategic road network. The portfolio of sites that could respond to future strategic needs and accommodate those seeking larger units close to the strategic road network is therefore relatively modest.

19. AV also caution that much of the supply, and particularly the better scoring sites, could face delays in coming forward due to development constraints or the slow progression of detailed planning applications. This could affect existing sites' ability to respond positively to the scale and profile of need that is identified in this report.

Supply-demand balance

20. The identified supply appears unlikely to meet the uppermost estimates of need developed in this report, in a purely quantitative sense, with the potential for **a deficit of up to 102.6ha** if past take-up continues and all losses are replaced. Even this could be a slight underestimate when removing the few sites that AV report as no longer being available.

21. There would though be **at least a quantitative surplus** in other scenarios, to varying degrees. This could be up to 43.7ha if only half of all losses are replaced in the labour supply scenario, for example, or up to 31.6ha based on the adjusted REM, albeit in the latter case this would entirely evaporate if the aim was instead to replace all losses.

22. This does assume that all sites will come forward, which clearly may not be the case given the poor quality of some – particularly within existing PEAs – and the deliverability challenges faced by others. There is consequently a prospect that any surplus will be smaller and deficit more pronounced, with the Council advised to further explore the likelihood of this occurring by developing a high-level trajectory estimating whether and when sites will come forwards. Consideration should also be given to whether land is distributed in such a way as to align with its spatial strategy and meet demand in different parts of Kirklees, including in rural areas. This can be expected to particularly vary in respect of offices, with a mix of smaller co-working spaces and premium flexible workspaces likely to be needed – the latter in North Kirklees and especially Huddersfield – despite the well-documented changes seen in the sector over recent years.

23. Qualitative factors should also be considered. The National Planning Policy Framework (NPPF) now emphasises the importance of meeting the needs of the '*modern*

economy', for instance, with Kirklees' strength in manufacturing and the growth potential of its life sciences sector potentially translating into a need for not only industrial space but also warehouses and laboratories, possibly close to the university and/or other businesses operating in these sectors. Logistics is also central to the modern economy, typically – though not always – requiring larger sites close to the motorway network which do appear to be lacking in Kirklees. Data centres, also referenced in the NPPF – and currently absent from Kirklees – likewise need to be in particular locations to power them.

1. Introduction

1.1 Kirklees Council ('the Council') commissioned Turley in partnership with Aspinall Verdi to prepare an Employment Land Study (ELS) for the district.

1.2 The ELS is intended to provide an up-to-date evidence base to support the Council's preparation of a new Local Plan, by determining future economic development needs after accounting for the latest employment growth forecasts and commercial property market signals. It is important to note that the study has been undertaken at a point in time, drawing on the latest information available during the period in which it was prepared (November 2024 – July 2025). It is recognised that local and national economies are subject to changing macro global factors as well as policy directions, which cannot be foreseen. The conclusions set out must be viewed in this context.

1.3 The study has been prepared alongside the Council's development and publication of an Inclusive Economy Strategy, which replaced the previous Kirklees Economic Strategy (2019-2025) when it was formally adopted towards the end of the reporting period in July 2025. To augment the analysis of published datasets a survey of local businesses was undertaken in November 2024, and the insights gained – summarised in **Appendix 1** – have informed the analysis and conclusions.

1.4 The ELS has been prepared in accordance with the latest Planning Practice Guidance (PPG) and the identified methodology for determining future economic development needs[1].

1.5 In accordance with the National Planning Policy Framework (NPPF) it has sought to assess the employment land and floorspace needs of local businesses and wider opportunities for development to support economic growth[2].

1.6 The UK's Modern Industrial Strategy was published towards the end of the reporting period, in June 2025, but consideration has been given to its ambition and objectives, particularly regarding the needs of a modern economy within Kirklees and the representation of what it views as key growth sectors within the district.

1.7 Recognising the geographic make-up of Kirklees specific attention has been given to the needs of businesses in the more rural areas of the district, as well as larger existing employment centres.

1.8 In identifying the need for employment floorspace and land, the approach seeks to capture the typologies set out in the following Use Classes:

- E(g)(i): office space and E(g)(ii): research and development space.

[1] https://www.gov.uk/guidance/housing-and-economic-development-needs-assessments

[2] Ministry of Housing, Communities and Local Government (December 2024) National Planning Policy Framework, paragraph 85

- E(g)(iii): light industrial space and B2 general industrial which typically comprises factory and manufacturing space.

- B8 storage and distribution including warehouses, wholesale and distribution.

Spatial overview

1.9 The Council's recently published Inclusive Economic Strategy – reviewed further in section 2 – identifies that Kirklees is strategically located at the heart of the UK and the centre of the Leeds, Manchester and Sheffield City Region triangle. It is noted as having excellent transport networks, which include:

- Easy access to the M62, M1 and A1;

- Direct rail links to Manchester and Leeds in 30 minutes, through to London in two hours;

- Manchester and Leeds Bradford airports within 45 minutes, and direct trains to Manchester Airport; and

- Seaports at Liverpool, Hull, Immingham and Teesport within two hours.

Figure 1.1: Kirklees' Position within the Northern Region



Source: Kirklees Council, Inclusive Economic Strategy

1.10 The district also has a number of geographic distinctions, where the Council also identifies that:

- It is the third largest metropolitan district in England

- Huddersfield is the 10th largest town in the UK

- 11% of Kirklees is within the Peak District National Park

Figure 1.2: Introducing Kirklees



1.11 The above have important consequences for the shape and profile of the local economy which are recognised throughout this report.

Report structure

1.12 The report is structured as follows:

- **Section 2: Policy Context**
- **Section 3: Economic Profile**
- **Section 4: Property Market Review**
- **Section 5: Need Scenarios**
- **Section 6: Employment Land Supply**
- **Section 7: Supply and Need Implications**

2. Policy Context

2.1 This section reviews relevant policy from the national to local level.

National

2.2 Since its election in July 2024, the Government has been clear in its view that '*sustained economic growth is the only route to improving the prosperity of our country and the living standards of working people'*[3]. It has stated that its *'central mission'* is to '*restore economic growth'* and it also aims to deliver the infrastructure that the country needs[4].

2.3 It has established an aim *'for the highest sustained growth in the G7 – with more people in good jobs, higher living standards, and productivity growth in every part of the United Kingdom'*[5].

2.4 In setting the milestone for measuring progress, it has arguably retained the essence of the previous Government's commitment to "levelling up" by acknowledging that *'growth must be felt by everyone, everywhere, so we will track GDP per head at both a regional and national level to drive prosperity across the United Kingdom'*[6].

2.5 In this context, it affirms that *'the main route to higher living standards is through good, productive jobs, stable employment, and a thriving business environment, and we believe that growth must be felt in every nation and region'*[7].

2.6 In setting out its approach to realising this mission, the Government has stated that it will, *inter alia*:

- Work in partnership with businesses, creating the right conditions for investment through the UK's Modern Industrial Strategy (considered below);
- Work with devolved governments and partner with mayors to develop local growth plans to give them the tools needed in areas like adult education, skills and employment support;
- Drive innovation, investment and the adoption of technology; and
- Help people get a job, stay in work, and progress in their careers, with good employment opportunities across the country. This is to be supported by the newly established Skills England and the Industrial Strategy Advisory Council, along with a reformed jobs and career service.

[3] MHCLG (August 2024) Proposed reforms to the National Planning Policy Framework and other changes to the planning system

[4] Speeches by the Chancellor, The Rt Hon Rachel Reeves MP, on 5/8 July 2024

[5] https://www.gov.uk/missions/economic-growth

[6] *Ibid*

[7] *Ibid*

2.7 The delivery of the mission to kickstart economic growth is also predicated on the Government achieving a commitment to "rebuild Britain". The Treasury clearly anticipates that '*the government's housing targets, coupled with investment in supporting infrastructure, will remove barriers to economic growth'*[8].

National Planning Policy Framework

2.8 The Government quickly expressed an intention to '*reform*' the NPPF shortly after its election, in order to '*kickstart economic growth*'[9]. It launched a consultation on proposed reforms within weeks[10].

2.9 Following this consultation, the Government implemented wide-ranging and ambitious reforms to the NPPF in December 2024, with the primary aim of increasing housebuilding in England[11]. The Office for Budget Responsibility (OBR) expects these changes to increase gross domestic product by 0.2% by 2029-30 – adding £6.8 billion to the economy – and by over 0.4% in 2034-35[12].

2.10 The Government has been clear to set out that changes to the NPPF are just a first step in its ambitious package of reforms to get Britain building again, secure affordable quality homes for all and drive economic growth.

2.11 With the objective of enabling economic growth, the 2024 NPPF continues to align with the preceding version in setting a clear expectation that '*planning policies and decisions should help create the conditions in which businesses can invest, expand and adapt*'[13]. It similarly continues to confirm that:

> *"Significant weight should be placed on the need to support economic growth and productivity, taking into account both local business needs and wider opportunities for development. The approach taken should allow each area to build on its strengths, counter any weaknesses and address the challenges of the future. This is particularly important where Britain can be a global leader in driving innovation, and in areas with high levels of productivity, which should be able to capitalise on their performance and potential"*[14]

2.12 The 2024 NPPF introduces a direct expectation that regard be given to the UK's Modern Industrial Strategy in the development of planning policies[15]. It also expects

[8] HM Treasury (January 2025) 10 Year Infrastructure Strategy Working Paper – A Cross-Government Plan for Infrastructure, page 1

[9] Speech by the Chancellor, The Rt Hon Rachel Reeves MP, on 8 July 2024

[10] MHCLG (August 2024) Proposed reforms to the National Planning Policy Framework and other changes to the planning system

[11] MHCLG (December 2024) National Planning Policy Framework

[12] HM Treasury (March 2025) Spring Statement, p2

[13] Paragraph 85 of the 2024 NPPF replicates (with the exception of a deletion of a footnote) paragraph 83 of the 2023 NPPF

[14] *Ibid*

[15] Paragraph 86 (a) of the 2024 NPPF

policies to identify strategic sites for local and inward investment to match the strategy and to meet anticipated needs over the plan period[16].

2.13 The 2024 NPPF also adds a direct reference to the '*modern economy*' reflecting the Industrial Strategy, requiring planning policies 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"[17]

2.14 It also adds further clarification on the expectations of planning policies and decisions to '*recognise and address the specific locational requirements of different sectors*'. It adds the following clarification on the different sectors to be provided for, noting this is not a closed list:

- 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);

- 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; and

- The expansion or modernisation of other industries of local, regional or national importance to support economic growth and resilience[18].

2.15 Acknowledging the rural nature of parts of Kirklees it is also noted that the 2024 NPPF continues to support a prosperous rural economy. Paragraph 88 identifies that policies and decisions should enable, inter alia:

- *"the sustainable growth and expansion of all types of business in rural areas, both through conversion of existing buildings and well-designed, new buildings"*; and

- *"the development and diversification of agricultural and other land-based rural businesses"*

The UK's Modern Industrial Strategy

2.16 The Industrial Strategy sets out the Government's plan to create the conditions necessary for the companies of the future to emerge, invest and deliver transformative growth. It identifies eight sectors ('the IS-8') – listed below and shown in Figure 2.1 – which it considers have the highest potential, and the frontier industries at their leading edge that support these sectors, to increase national productivity, strengthen

[16] Paragraph 86(b) introduces the following change from the 2023 iteration: *set criteria, ~~or~~and identify strategic sites…*

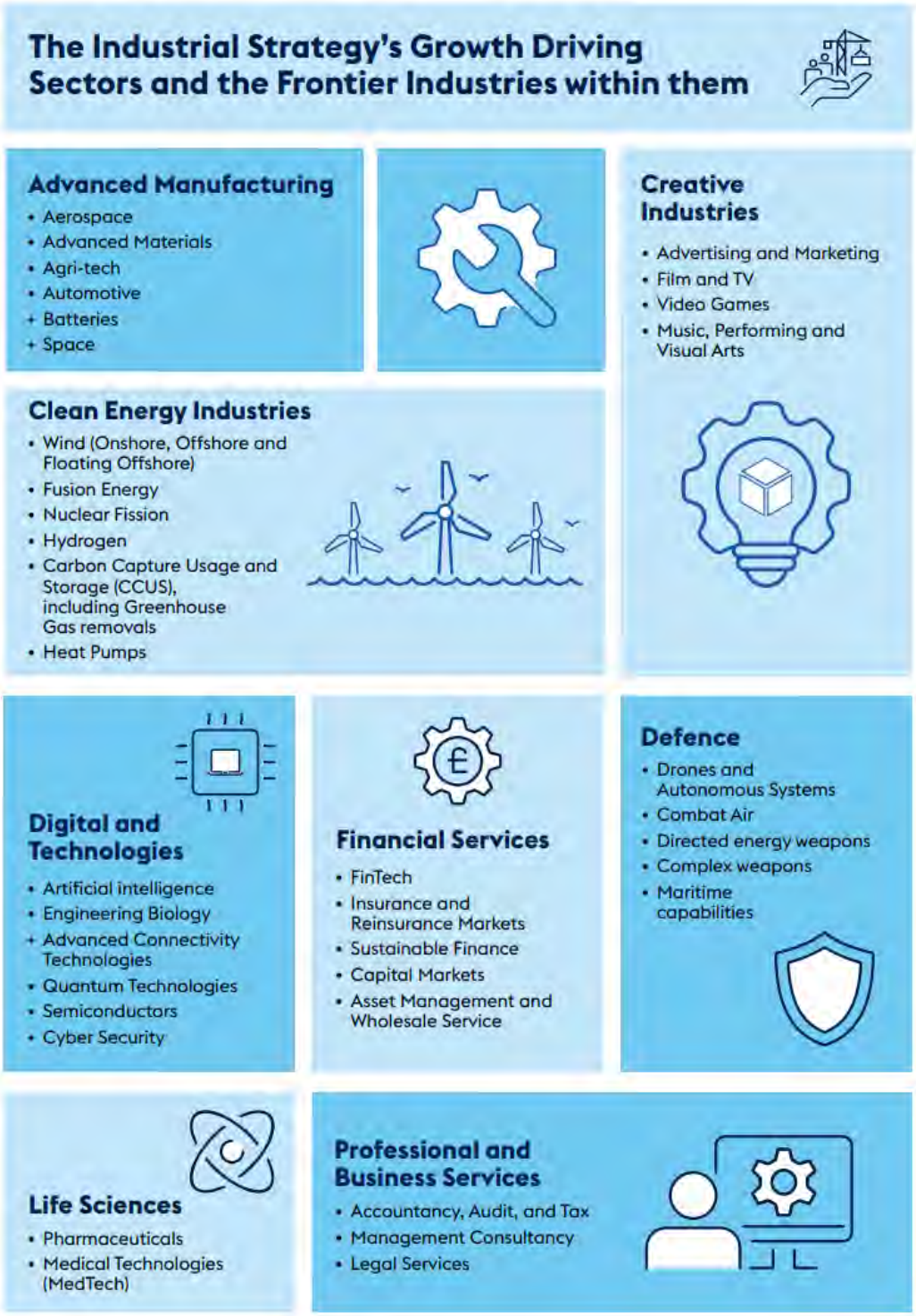
[17] MHCLG (December 2024) National Planning Policy Framework, paragraph 86c

[18] *Ibid*, paragraph 87

the UK's economic security and resilience and support the country's environmental goals and the transition to net zero.

- Advanced Manufacturing;
- Clean Energy Industries;
- Creative Industries;
- Defence;
- Digital and Technologies;
- Financial Services;
- Life Sciences; and
- Professional and Business Services.

Figure 2.1: The Industrial Strategy's Growth Driving Sectors and the Frontier Industries within them



Source: UK's Modern Industrial Strategy, page 116

2.17 The Industrial Strategy confirms that the Government will enable investment and growth in city regions and clusters across the UK where the IS-8 are based. In this regard specific reference is made to connecting and supporting a growth corridor

across the northern city regions. This includes *'developing investible opportunities across the North'*[19].

Regional

Leeds City Region Statement of Common Ground

2.18 In March 2020 the Council, along with the other constituent authorities in the Leeds City Region (LCR), signed a Statement of Common Ground (SoCG). This included commitments to a range of actions on strategic issues related to inclusive growth and employment affecting the LCR. The following requirements are of particular relevance to this study:

- To take into account the LCR and York, North Yorkshire and East Riding Strategic Economic Plans and emerging Local Industrial Strategies in preparing Local Plans
- To take account of economic forecasts from the Regional Econometric Model (REM) in undertaking modelling for Local Plans
- Plan for 35,700 net additional jobs above baseline job growth projections to 2036 in the LCR, as a shared ambition identified in the LCR Strategic Economic Plan (SEP)
- Ensure that Local Plans drive employment growth in the 16 employment growth areas as identified in the LCR SEP. These include mixed use sites and the Enterprise Zones (EZs) of York, Leeds (Phase 1 Leeds City Region EZ) and the 10 sites across the five West Yorkshire districts which are located along key arterial routes of the M1, M62 and M606 corridors (Phase 2 Leeds City Region EZ).

Leeds Economic Partnership Strategic Economic Plan

2.19 The Leeds Economic Partnership SEP sets out four strategic priority areas to guide business growth and economic prosperity across the region:

- Strategic Priority One: Growing Business
- Strategic Priority Two: Skilled People, Better Jobs
- Strategic Priority Three: Clean Energy and Environmental Resilience
- Strategic Priority Four: Infrastructure for Growth

2.20 The SEP identifies that Kirklees has a number of assets including world leading engineering and textile businesses and cutting-edge innovation and creative businesses. It also identifies a number of local key assets for improving economic performance, with these including the regeneration of Huddersfield and North Kirklees through the provision of space for business to grow.

2.21 The SEP designated several areas within Kirklees as Spatial Priority Areas for employment growth. These included allocations in the Local Plan, noting that

[19] UK Government, Department for Business and Trade (June 2025), The UK's Modern Industrial Strategy, page 110

developments have been completed on Lindley Moor West and Moor Park, Mirfield since the SEP was published:

- Lindley Moor East and Lindley Moor West (MXS3 – Land south of, Lindley Moor Road, Lindley)
- Moor Park, Mirfield (MXS6 – Land at Slipper Lane, Leeds Road)
- Chidswell (MXS5 – Lees House Farm, Leeds Road, Dewsbury; and MXS7 – Land east of Leeds Road, Chidswell)
- Cooper Bridge (ES9 – Former Cooper Bridge Waste Water Treatment Works, Leeds Road)

LCR Strategic Employment Evidence – Land and Property

2.22 In 2021, Hatch Consulting published a report on commercial property market trends in the LCR along with the interventions needed to support economic growth across this area. The report identified a demand for small and affordable office spaces from small to medium enterprises and businesses serving local markets. On the industrial market, the report identified a requirement in Kirklees for small industrial units along providing up to 10,000sqft and grow on space (10,000-50,000sqft) and access to research and development and higher education institutions for more innovative subsectors.

2.23 In terms of warehousing the report identified a need for large flat sites with access to the road network, as well as high-quality space on the M62 corridor between Brighouse and the A1(M) with the observation that sites in the northern part of Kirklees can deliver these requirements.

2.24 The report recommends that Kirklees Council prioritises the expansion of existing industrial estates to provide grow on space for existing businesses. There is also a recommendation that large sites close to the motorway network should be prioritised.

West Yorkshire Combined Authority Local Growth Plan (2025 – 2035)

2.25 The West Yorkshire Combined Authority (WYCA) Local Growth Plan (LGP) is aimed at tackling the barriers – investment, skills and connectivity – that are identified as holding back growth in West Yorkshire.

2.26 It recognises the scale of the challenge, identifying that if the UK is to achieve its national growth ambitions it needs West Yorkshire to drive up productivity growth. It suggests that closing the output gap with the UK would mean 18,000 additional businesses, 53,000 more people with Level 4 qualifications, 40,000 more jobs, and £3.2 billion more investment each year.

2.27 In response to this challenge it identifies the potential to add £26 billion to regional GVA over its ten year lifetime, referencing the latest iteration of WYCA's REM which is also drawn upon by section 5 of this report. It states that *'closing the productivity gap will require growth in sectors of the economy where West Yorkshire has existing*

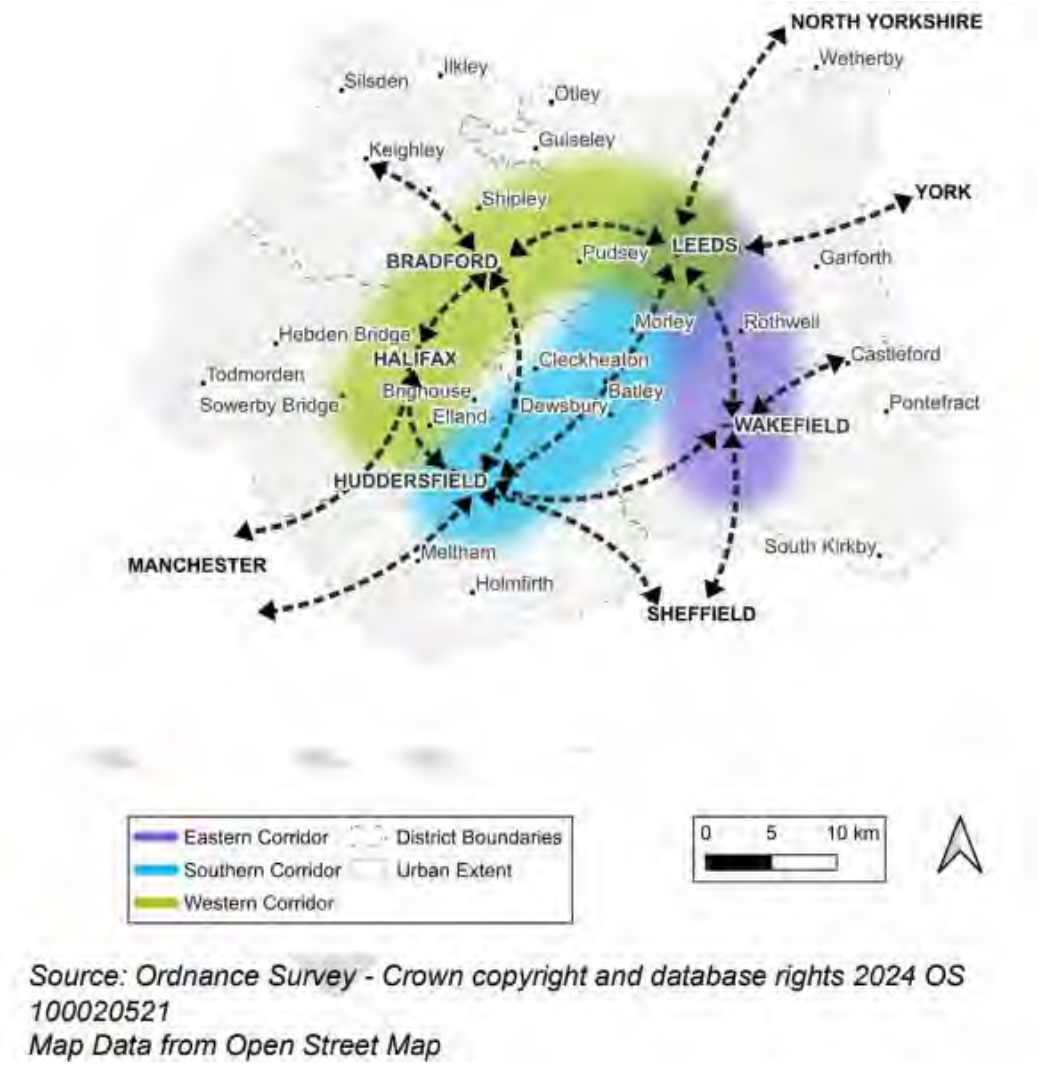
specialisms, alongside the emergence of new opportunities from within specialist sectors"[20].

2.28 The LGP describes Kirklees as having:

"…high-performing manufacturing and engineering sectors, with above-average productivity within sector specialisms such as textiles and chemicals. Kirklees is home to the University of Huddersfield, with leading strengths in health, materials and rail"[21]

2.29 It identifies three Corridors of Opportunity, illustrated in the following plan. This includes the 'Southern Corridor' which includes Kirklees and stretches from Leeds to Dewsbury and Huddersfield and on to Greater Manchester and South Yorkshire.

Figure 2.2: West Yorkshire Corridors of Opportunity



Source: Ordnance Survey - Crown copyright and database rights 2024 OS 100020521
Map Data from Open Street Map

Source: WYCA LGP, Figure 3.1, page 29

2.30 The LGP identifies the Southern Corridor as being centred on the major urban extensions of Dewsbury Riverside and Leeds Southbank, which in the future will be

[20] WYCA (2025) West Yorkshire Local Growth Plan, p21

[21] *Ibid*, p24

connected via mass transit. Investment in the corridor is also noted as sitting alongside the £11 billion Transpennine Route Upgrade. Along with investment in Dewsbury the LGP identifies that:

"Huddersfield has a strong asset base and major regeneration plans such as the Station to Stadium Enterprise Corridor masterplan. This includes the University of Huddersfield's National Health Innovation Campus and significant development opportunities within the wider corridor, such as the Gas Works Street site – both of which are part of the West Yorkshire Investment Zone"[22]

2.31 The LGP sets out five high level priorities for growth:

- **Unlocking growth in priority sectors** – creating an important interface with the sector-focused Industrial Strategy, the LGP identifies digital and tech, financial and professional services, health and life sciences, advanced manufacturing and engineering – including textiles, chemicals, food and drink, green economy, modern methods of construction – and the creative industries as key regional opportunities to drive growth. It specifically identifies that with regards to textiles Kirklees has the highest level of employment of any UK district, with the Textile Centres of Excellence in Huddersfield delivering industry training throughout the UK. It also identifies that Future Fashion Factory, supported by the University of Huddersfield and the University of Leeds, supports innovation across the textiles and fashion industry to enable the shift to more circular economies.

- **Enabling all businesses to succeed** – details how public/private sector support for businesses will be developed; support for alternative business models and promoting good business practices including the Fair Work Charter.

- **A region of learning and creativity** – this sets out how West Yorkshire's education and training system will be enhanced, including new technical pathways; improving the transition between different stages of education/learning; boosting the availability of early years childcare provision and increasing employer investment in skills.

- **Transport and connectivity** – this sets out WYCA's plans to develop a mass transit network, initially focused on connecting Bradford with Leeds and Leeds with the White Rose shopping centre; development of a deregulated, franchised bus network across West Yorkshire; and highlights the importance of rail infrastructure investment including the Transpennine Route Upgrade and Penistone Line.

- **Supporting thriving places** – acknowledging that vibrant places drive economic growth, as referenced above the LGP identifies a series of Corridors of Opportunity that seeks to strengthen connectivity between the core city of Leeds and the adjoining communities; the 'Southern Corridor' extends from Leeds South Bank to include the major Dewsbury Riverside housing site,

[22] *Ibid*, page 32

Dewsbury Town Centre and the Station to Stadium Enterprise Corridor in Huddersfield.

West Yorkshire Plan

2.32 WYCA published the West Yorkshire Plan in 2023. This includes the following key missions:

- Mission 1: A prosperous West Yorkshire – an inclusive economy with well paid jobs
- Mission 2: A happy West Yorkshire – great places and healthy communities
- Mission 3: A well-connected West Yorkshire – a strong transport system
- Mission 4: A sustainable West Yorkshire – making lives greener
- Mission 5: A safe West Yorkshire – a region where all can flourish

WYCA Manufacturing Task Force

2.33 Further to the above Plan, WYCA has also focused on a number of economic drivers. This includes the establishment of the WYCA Manufacturing Task Force which sets out the aspirations for the future of this sector, aiming to boost its strength and attractiveness through elevated investment to improve productivity. Specific reference is made within the paper to the existence of manufacturers in Kirklees that are operating in the area of manufacturing low carbon products.

WYCA Spatial Priority Areas

2.34 WYCA has also published a prospectus identifying a range of Spatial Priority Areas (SPAs) across West Yorkshire[23]. This includes the following of relevance:

- Huddersfield Town Centre – covering around 58 ha providing key retail, employment, leisure and higher education opportunities. The Huddersfield Blueprint is identified as setting out the vision and ambitions for the town centre up to 2031.
- 'Station to Stadium' Enterprise Corridor – this connects Huddersfield Train Station, the University and the Accu Stadium and is identified as acting as a key gateway into the town, with the National Health Innovation Campus (NHIC) of the University of Huddersfield at its heart. Designated as one of only eight Investment Zones throughout England, it is specifically referenced in the LGP.
- Cooper Bridge – located between Huddersfield and Mirfield with the allocated site identified for employment, housing and mixed-use allocations.
- Dewsbury – identified as a key regeneration priority with the Dewsbury Town Investment Plan taking forward the Dewsbury Blueprint and providing a 10 year plan for the town.

[23] West Yorkshire Spatial Priority Areas (SPAs)

- Dewsbury Riverside Urban Extension – identified as a key site within the North Kirklees Growth Zone, which is identified as a priority area for housing growth in the Leeds City Region Strategic Economic Plan.

- Batley – identified as another key regeneration priority area and forming part of the wider North Kirklees Growth Zone SPA cluster.

- Manchester Road / Blackmoorfoot Road Corridor – formed from a cluster of housing and mixed-use sites and located to the south-west of Huddersfield.

- Woodhouse Garden Community / Bradley Garden Village – located on the border of Kirklees and Calderdale and intended to form a garden community.

Local

Kirklees Local Plan

2.35 The Kirklees Local Plan was adopted on 27 February 2019. It establishes an ambition to deliver approximately 23,000 jobs over the plan period from 2013 to 2031. The Plan stipulates that this translates into an employment land requirement of 175 hectares.

2.36 In considering supply the Local Plan identified that:

- Since its base date (1st April 2013) **28 hectares** had been taken up

- Approximately **15 hectares** was subject to planning permission i.e. commitments which was windfall (land not allocated in the previous development plan)

- There were **7 hectares** supply from previous permissions (on land not allocated for employment or mixed use)

- There were also established business and industrial sites, deemed as Priority Employment Areas (PEAs). These were largely developed but included parcels of vacant land. The Plan did not consider these sites to be prime, being neither allocated nor in receipt of planning permission, but they constituted a further potential **48 hectares**. Policy LP8 protected these PEAs and sought to safeguard them for employment uses.

- A series of employment sites were allocated that provided large areas of undeveloped land, in locations that were considered to be well placed to take advantage of established business corridors with good access to the workforce, public transport and motorway junctions. These totalled **95 hectares** and included a large allocation of some 35ha close to Chidswell and the motorway network. Aside from a circa 11ha site in Cleckheaton all the other allocations were less than 10ha.

- There was a total of **193 hectares** of employment land, when summing the above, suggesting an oversupply of 18 hectares. This was identified as ensuring a degree of flexibility.

2.37 Several of the allocations included the release of Green Belt land. In this regard the Inspector's report confirmed that:

"Green Belt releases would enable the Council to meet local needs for economic growth and its aspirations for the delivery of some 23,000 additional jobs over the Plan period. Additional large sites, particularly in strategic locations in the north of the district, would help to boost the manufacturing and engineering sectors and make an important contribution to the economy of the wider region and in meeting the aims of the LCR SEP"[24]

The objectively assessed need for employment land

2.38 The Council's Employment Technical Paper, produced in 2017, explains the approach that was taken to generate the job target and its associated employment land requirement.

2.39 As referenced in the current Local Plan, the target was drawn from the Kirklees Economic Strategy (KES) which set a central target to achieve an employment rate that was at or around 75% by 2020. The Paper explains that 75% was selected as it was the highest rate Kirklees had achieved in recent history, being recorded prior to the 2007 credit crunch. It was identified that achieving this ambition would require the realisation of major development opportunities in the district. Specific reference was also made to anticipated growth in the engineering and manufacturing sector, recognising Kirklees locational specialism in the sector (accounting for 17% of jobs in 2013). The KES identified a target to see employment in the sector increase to 29,000 by 2020 aligned with stronger GVA growth, with this suggesting a net increase of some 3,500 jobs.

2.40 Several specific physical investments are also identified as supporting growth including assets such as the 3M BIC Innovation Centre; the Textile Centre of Excellence; the Media Centre; the Globe Mill Technology Centre; and the National Process Manufacturing Centre.

2.41 The Paper highlights that where the Council initially undertook a modelling exercise that involved applying employment rates to the population projections and making allowances for commuting, the Regional Econometric Intelligence Unit (REIU) raised concerns with the robustness of this approach. Following their recommendations the Council used the REM – developed by Experian – to apply integrated adjustments that allowed for the Council's growth ambitions. In reflecting the ambitions of the KES the modelling also assumed more realistic timescales for achieving growth ambitions, with these pushed out to 2031 rather than 2020. Three scenarios were run, which generated alternative job growth outputs:

- Scenario 1: Baseline (trend) jobs forecast without intervention – 14,820 full-time equivalent (FTE) jobs

- Scenario 2: Meeting the KES objective of 75% employment rate and generating 3,500 jobs by 2031 in manufacturing and engineering sectors – 23,200 FTE jobs

[24] Kirklees Council Kirklees Local Plan, Inspector's Report 30 January 2019, paragraph 94

- Scenario 3: Achieving an 80% employment rate and generating 3,500 jobs by 2031 in manufacturing and engineering sectors Economic Strategies – 32,900 FTE jobs

2.42 As noted earlier the target of 23,000 jobs is identified in the Local Plan, aligning with Scenario 2. This was translated into a land requirement of 175 hectares using assumptions for the Yorkshire and Humber region that were derived from a 2010 study by Roger Tym and Partners[25] (RTP; *'Planning for Employment Land, Translating Jobs into Land*'). These included:

- B1(a) office – 16 sqm of building floorspace per worker, and 6,000 sqm of building floorspace per hectare of land, and

- B1(b), B1(c), B2 and B8 – 67 sqm of floorspace per worker, and 3,500 sqm of floorspace per hectare.

2.43 Within the Paper the employment land calculation summary includes a 10% flexibility allowance, applied to the employment land requirement once completions and commitments had been allowed for. It is not apparent that this flexibility allowance was specifically retained in the Local Plan, albeit as noted above a degree of overprovision was made. The Inspector's report confirms in this regard that:

"As further allocations would be likely to involve the release of Green Belt land, I consider it represents an appropriate balance between meeting employment needs and protecting the Green Belt. On-going monitoring will take place, and if there is future undersupply it could be dealt with by Plan review. The submitted Plan includes a 10% flexibility allowance, but I consider that a specific figure is not necessary when an oversupply of 18 hectares is demonstrated"[26]

2.44 While the Local Plan's requirement for employment land was based on an employment demand methodology, the Council did also consider historic take-up. Within its submissions to the Local Plan Examination, it reported that an average of circa 9.7ha of employment land had been taken up between 2004 and 2015, suggesting a need for 174.6ha if extrapolated over the plan period[27]. This evidently aligned closely with the outcome of the demand scenario (c.175ha). Significantly though, the Council also identified in its evidence that take-up had been historically suppressed by the relatively limited supply of large and strategically significant sites, with the last two significant UDP employment allocations being granted permission, such that a more significant need for employment land was acknowledged as a possibility.

[25] The Local Plan Inspector's Report (30 January 2019) confirmed at paragraph 90 with reference to the use of the Roger Tym Report assumptions: *'Although the Homes and Communities Agency has produced more recent figures, they are nationally based. I therefore conclude that the jobs density assumptions applied in the Plan are reasonable*'

[26] Kirklees Council Kirklees Local Plan, Inspector's Report 30 January 2019, paragraph 96

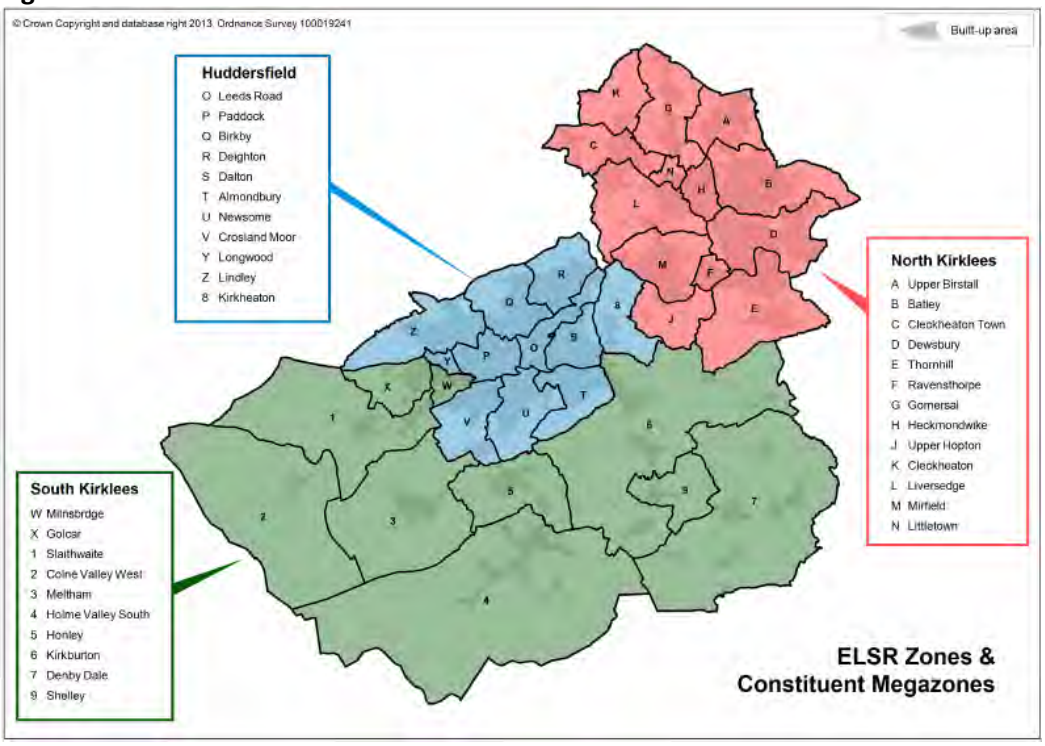
[27] Kirklees Council Employment Technical Paper (2017), paragraph 6.3 and Table 3

Kirklees Market Areas

2.45 The Council's monitoring of employment land supply has been disaggregated to reference three economic market areas. These are shown on the following map and are:

- North Kirklees
- Huddersfield
- South Kirklees

Figure 2.3: Kirklees market areas



Source: Employment Land Supply Review, 2019

2.46 The Employment Technical Paper references that these geographies were validated within the Kirklees Employment Market Strength Assessment, which was produced in 2015 and also identified their different functions.

2.47 These functions were captured within the Technical Paper which in summary identified the following defining characteristics and roles:

- **North Kirklees**: The proximity to key motorway junctions of the M62 (J25-27) provides an opportunity to attract strategic demand from both regional and national occupiers for manufacturing particularly in high value-added textiles, design and engineering sectors. The flat topography of the area is identified as also presenting opportunities for the delivery of larger sites.

- **Huddersfield**: The established hub for the service sector and the main location for office uses. Huddersfield's proximity to the M62 (J24) is also identified as an

important driver as is the scale of the resident population in the town and associated amenities.

- **South Kirklees**: This area is identified as aligning with Kirklees Rural sub-area and generally accommodates smaller scale businesses and smaller operational requirements catering for local demand.

Kirklees Inclusive Economic Strategy (2025)

2.48 The Kirklees Inclusive Economic Strategy (KIES) is framed as a partnership strategy with the stated aim of aligning with the UK's Modern Industrial Strategy and WYCA's LGP.

2.49 It recognises the opportunities presented through investment in strategic transport infrastructure, observing that the TransPennine Route Upgrade and the planned improvements to the Penistone Line will increase access to job opportunities and widen the talent pool for local businesses. In line with several of the strategies introduced above it recognises Kirklees' existing specialisms in textiles, advanced manufacturing and precision engineering, aspiring to be '*known for*' these strengths in 2030. The same ambition is stated for health and life sciences. This reflects the Council's evidence base summarised in more detail below.

2.50 Recognising the importance of the emerging Local Plan to support growth ambitions the KIES specifically references that:

"The new plan will create opportunities for development of new businesses and industrial premises, in the right places, to address this demand, and support an even greater rate of job creation"[28]

2.51 The KIES establishes an objective to upskill its residents and confirms that:

"In line with the Get Britain Working White Paper we aspire to achieving an economic activity rate of 80% and setting a trajectory to create 27,800 additional jobs by 2043 – the life of the refreshed local plan"

2.52 It is observed that this ambition draws upon evidence set out within this report and its underlying evidence.

Economic Sector Showcases

2.53 The Council has developed showcases in areas of specialism related to the advanced manufacturing capabilities and clustering of local businesses. This recognises that there are currently 30,000 people working in the sector in Kirklees and that this is growing. Businesses are attracted by the relatively affordable cost of commercial property (rental costs up to 23% cheaper than competitor advanced manufacturing locations in England) and a skilled workforce noting investment in the University of Huddersfield and the location of the National Physical Laboratory in Huddersfield as well as the 3M Buckley Innovation Centre. The showcase sectors are:

[28] Kirklees Inclusive Economic Strategy (2025), page 20

- **Advanced Precision Engineering**: Kirklee has one of the largest concentrations of component manufacturing in the UK and four times the national average industry concentration for machinery and equipment manufacturing.

- **Textiles**: Kirklees accommodates 360 market-leading textile businesses across the region and there is a skilled textiles workforce of 10,000 in West Yorkshire.

- **Health Innovation**: Kirklees has industry clusters of next generational medical devices and the manufacture of medical tools and instruments. The Council also identifies that there exist a wealth of business incentives and support programmes driven by the University of Huddersfield's new £250m National Health Innovation Campus and West Yorkshire Life Sciences Investment Zone.

Aspire, Achieve, Include: The Kirklees Post-16 Employment and Skills Plan 2022-2025

2.54 This Plan sets out how the Council, working with partners, will support and invest in the local employment and skills system over the next three years. It recognises the importance of the higher and further education on offer within the district, which includes the University of Huddersfield – with around 20,000 students – as well as Greenhead College, Huddersfield New College and Kirklees College.

Summary

2.55 A review of policy and strategy from the national to local level shows a consistently clear ambition to support economic growth.

2.56 Kirklees has an important role to play in supporting the sub-regional and national growth agendas which is recognised in its own up-to-date economic strategy. The strategies are clear in identifying the existing specialisms within Kirklees from which it will be important to build. These include the textiles sector and advanced precision engineering which align with the national support given to the advanced manufacturing sector. Reference is also made to the emerging health innovation specialism, again aligning with the life sciences national growth sector.

2.57 Investment in transport infrastructure and the positive impacts anticipated in enabling and supporting economic growth is also a key feature of local and sub-regional strategies. The inclusion of Kirklees within the defined Southern Growth Corridor affirms the role it is intended to play in capitalising on this investment.

3. Economic Profile

3.1 This section profiles the Kirklees economy considering influencing drivers including demographics and the local labour force.

3.2 In presenting the analysis it recognises the distinct geographies within Kirklees drawing spatial comparisons and benchmarking performance against sub-regional, regional and national comparators.

3.3 Where it is appreciated that the local economy is shaped by external factors over time the analysis seeks to understand trends over a reasonable historic period. This is important in order to appraise forward projections of potential growth in subsequent sections of the report.

Enduring functional relationships

3.4 The Inspector examining the current Local Plan acknowledged in 2019 that Kirklees forms part of the '*wider functional economic area*' of the LCR[29].

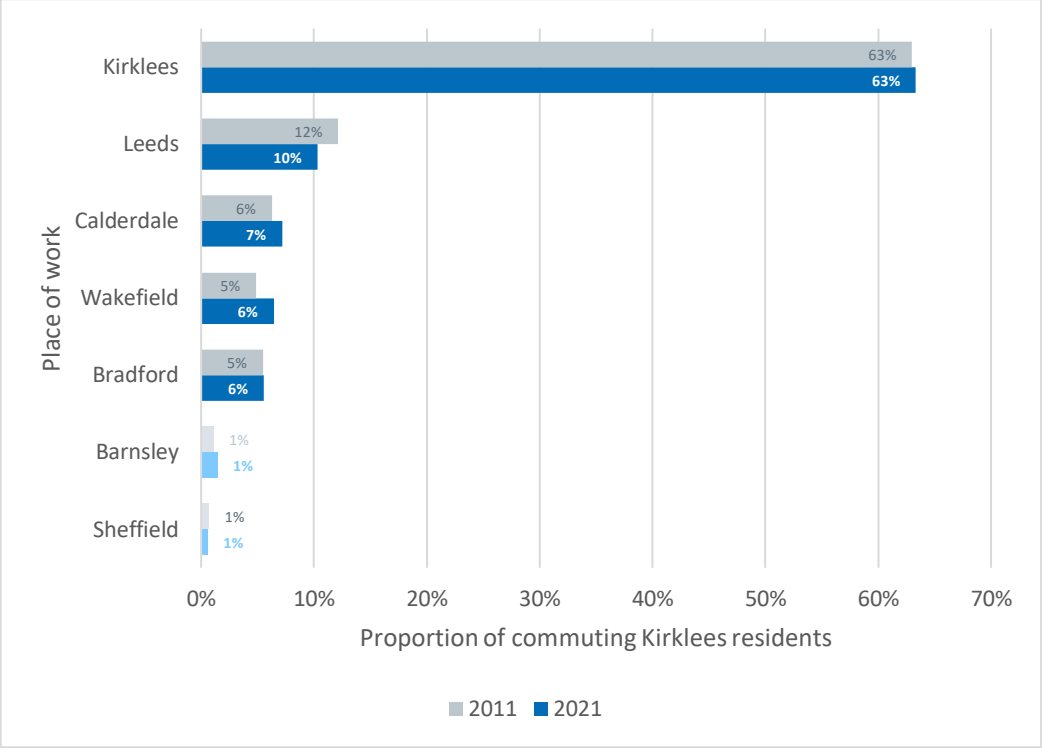
3.5 Relationships with its contemporaries in this area – namely Bradford, Calderdale, Leeds and Wakefield – unsurprisingly appear to have endured in the years since, according to the 2021 Census which will have undoubtedly been influenced by the COVID-19 pandemic but still provides the most recent comprehensive insight into commuting patterns.

3.6 While 40% of Kirklees residents were working from home or had no fixed place of work as of the 2021 Census – up from 16% a decade earlier – some 93% of those that did commute remained within the LCR. This represents a slight increase from 2011, when this was true of 92% of all commuting residents.

3.7 Leeds remained the most common destination beyond Kirklees itself – which continued to retain almost two thirds (63%) of residents travelling to work – but there was a slight reduction in the proportion travelling to the city, potentially reflecting its offer of jobs that could be done from home during this stage of the pandemic. This modest reduction was more than offset by slight increases in the proportion of residents commuting to Calderdale, Wakefield and Bradford, which served to increase the overall proportion remaining in the LCR.

[29] Planning Inspectorate (January 2019) Report on the Examination of the Kirklees Publication Draft Local Plan, paragraph 87

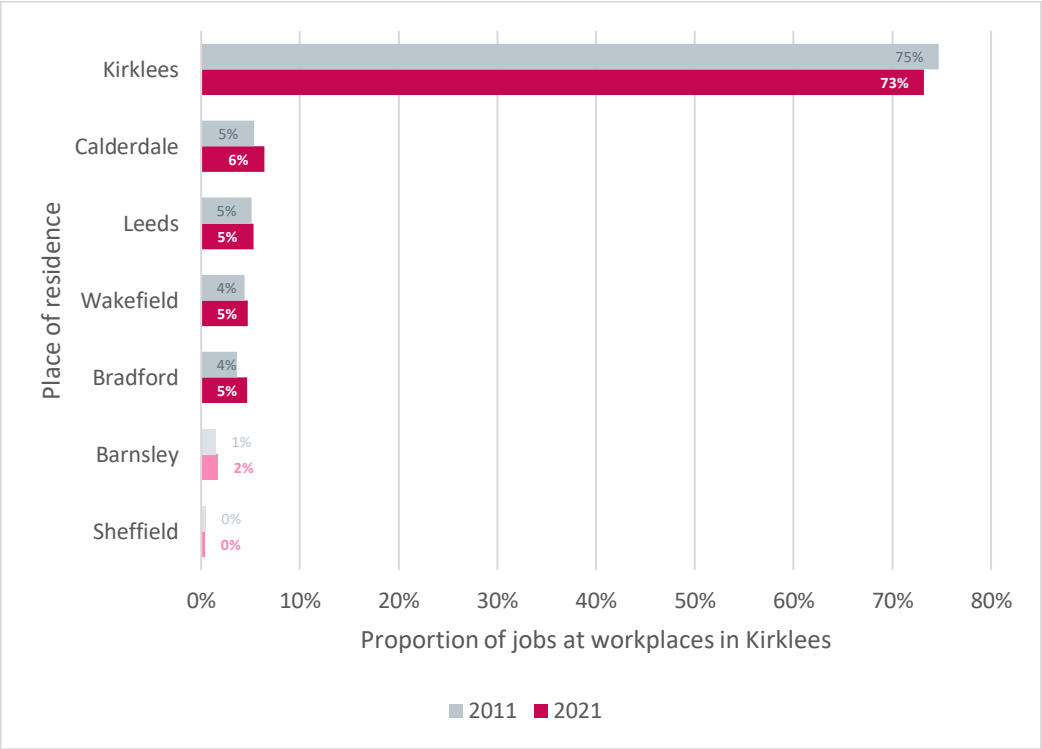
Figure 3.1: Main Places of Work for Commuting Residents of Kirklees (2011/21)



Source: Census 2011; Census 2021

3.8 Kirklees itself also continued to draw labour from throughout the LCR to fill most of the jobs that existed at workplaces in the district as of the 2021 Census, albeit while continuing to fill around three quarters with its own residents. Only 6% of jobs were taken by people living outside of the LCR, down only slightly from 7% in 2011. This is broadly consistent with the findings of the business survey summarised at **Appendix 1**, with a majority of responding businesses saying that Kirklees residents filled at least three quarters of their roles.

Figure 3.2: Main Places of Residence for People Employed at Workplaces in Kirklees (2011/21)



Source: Census 2011; Census 2021

3.9 There does appear to have been some variability between the market areas introduced at the earlier Figure 2.3[30]. Employed residents of North Kirklees, who were not working from home, were the least likely to have remained within the district even if around half did stay within North Kirklees itself. Fewer than a third of those living in South Kirklees commuted to a workplace in that area, with more having travelled elsewhere in the district. This area notably relied most on the district's residents to fill its jobs, contrasting with North Kirklees where roughly a third were filled by people travelling in from other authorities.

[30] Best fitting middle super output areas (MSOAs) to the geographies historically defined by the Council

Table 3.1: Commuting Patterns by Market Area (2021)

Area	Jobs filled by area's residents	Jobs filled by other residents of Kirklees	Commuting residents working in area	Commuting residents working elsewhere in Kirklees
Huddersfield	48%	77%	49%	69%
North Kirklees	56%	67%	49%	58%
South Kirklees	49%	82%	31%	67%

Source: Census 2021

Employment growth

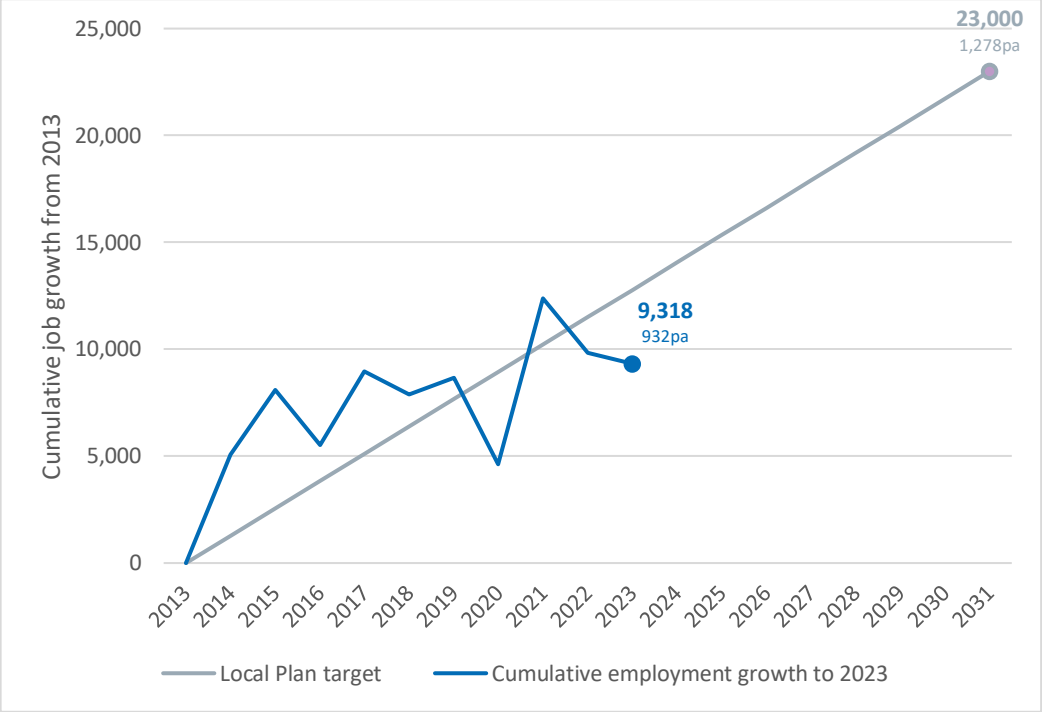
3.10 Nearly half (47%) of the businesses that responded to the survey reported their workforce to have grown over the previous year, with 36% indicating that their workforce had remained the same size.

3.11 As '*the official source of employee and employment estimates by detailed geography and industry*', the Business Register and Employment Survey (BRES) helps to understand the impact of such decisions on overall employment levels in Kirklees[31]. It draws upon a wide range of information to provide publicly available estimates of employment, including employees and working business owners, which can be tracked over time. It therefore provides a reasonable basis for measuring the success of the Local Plan to date, where the previous section explained that this aimed to create 23,000 jobs between 2013 and 2031.

3.12 BRES data indicates that circa 9,318 jobs have been created throughout Kirklees between 2013 and 2023, the last year reported at the time of writing. While this represents around 41% of the additional jobs targeted, it does suggest that growth would need to accelerate for the target to be met. An average of circa 1,278 jobs per annum would need to be created over the whole plan period to achieve it, whereas only 932 – roughly 27% fewer – are reported to have actually been created each year on average during its initial decade to 2023.

[31] https://www.ons.gov.uk/surveys/informationforbusinesses/businesssurveys/businessregisterandemploymentsurvey

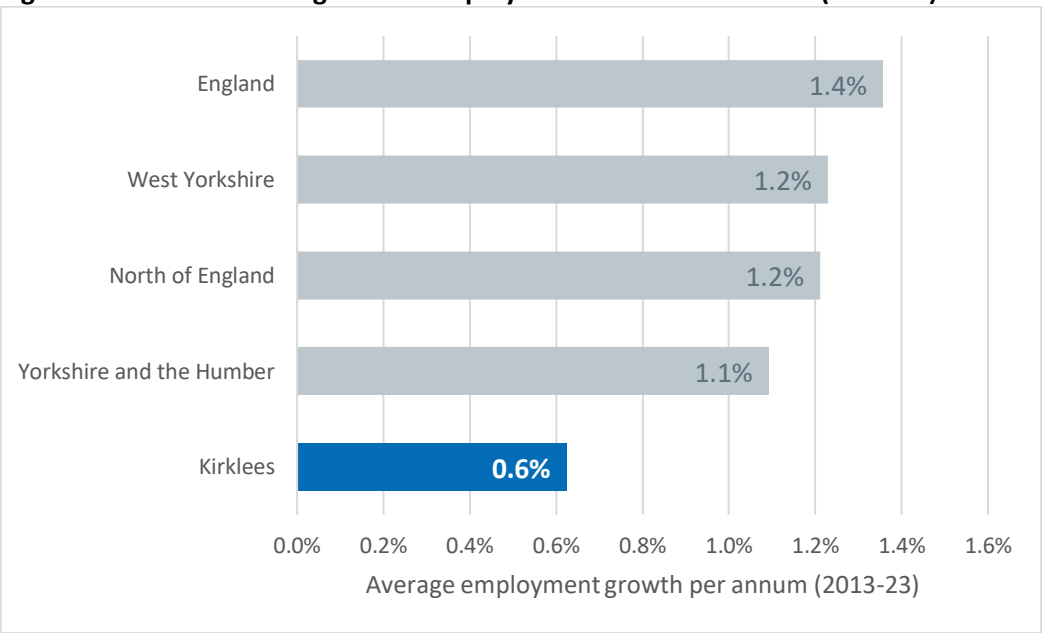
Figure 3.3: Employment Growth to 2023 vs. Local Plan Target



Source: BRES; Turley analysis

3.13 Creating an average of around 932 jobs per annum since 2013 is equivalent to growing employment levels in Kirklees by an average of 0.6% each year. This is around half the rate of growth concurrently seen across West Yorkshire and the North of England, and even further short of the growth seen nationally as shown by Figure 3.4.

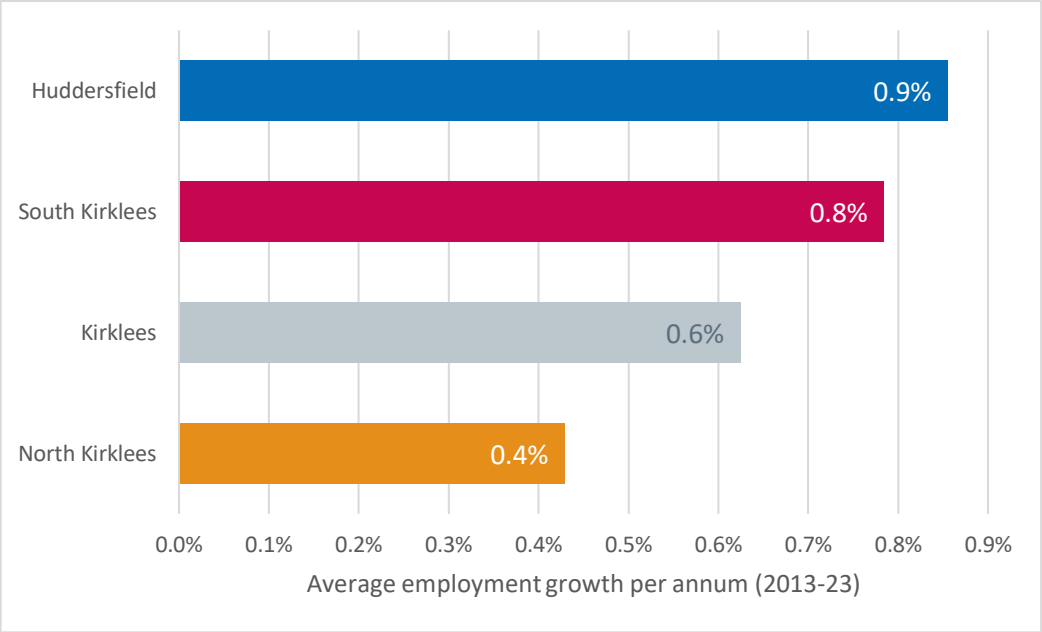
Figure 3.4: Benchmarking Rate of Employment Growth in Kirklees (2013-23)



Source: BRES; Turley analysis

3.14 The rate of employment growth has varied in different parts of Kirklees, as can be explored using the defined market areas. Huddersfield and South Kirklees appear to have both outperformed the wider district, creating jobs at a faster rate but still falling behind the wider areas shown above. North Kirklees has contrastingly seen a slower rate of growth.

Figure 3.5: Comparing Employment Growth Rates within Kirklees (2013-23)



Source: BRES; Turley analysis

3.15 Despite having created proportionately fewer jobs in recent years, North Kirklees does continue to offer the greatest number of jobs, with 69,181 having been reported in 2023. Huddersfield offers around 4% fewer (66,141) while South Kirklees has less than half as many (26,038).

Employment growth by sector

3.16 BRES data can also be broken down by sector, to separate those that have created jobs in Kirklees from others that have seen job losses. Table 3.1 overleaf indicates that five sectors have each created an average of 200 jobs per annum since 2013. This included, in manufacturing and human health, two of what were then – and indeed remain – the largest employers in proportionate terms. It is though apparent that the outright largest sector, namely wholesale and retail trade, has seen some 300 jobs lost annually on average during the current plan period, such that it is now responsible for a smaller proportion of all jobs in Kirklees.

Table 3.2: Change in Employment by Sector[32] (2013-23)

Sector	% of all employment in 2013	**Average annual change 2013-23**	**% of all employment in 2023**
Manufacturing	15%	+200	**15%**
Human health & social work	14%	+200	**14%**
Accommodation & food services	5%	+200	**7%**
Administrative & support services	5%	+200	**6%**
Transportation & storage	4%	+200	**5%**
Public administration & defence	3%	+100	**4%**
Real estate activities	2%	+100	**2%**
Other service activities	1%	+50	**2%**
Financial & insurance activities	1%	+25	**1%**
Education	11%	0	**10%**
Professional, scientific & technical	6%	0	**6%**
Construction	5%	0	**5%**
Information & communication	2%	0	**2%**
Arts, entertainment & recreation	2%	0	**2%**
Agriculture, forestry & fishing	1%	0	**1%**
Mining & quarrying	0%	-5	**0%**
Electricity, gas, steam & air con	0%	-8	**0%**
Water supply & sewerage	1%	-30	**0%**
Wholesale & retail trade	21%	-300	**18%**

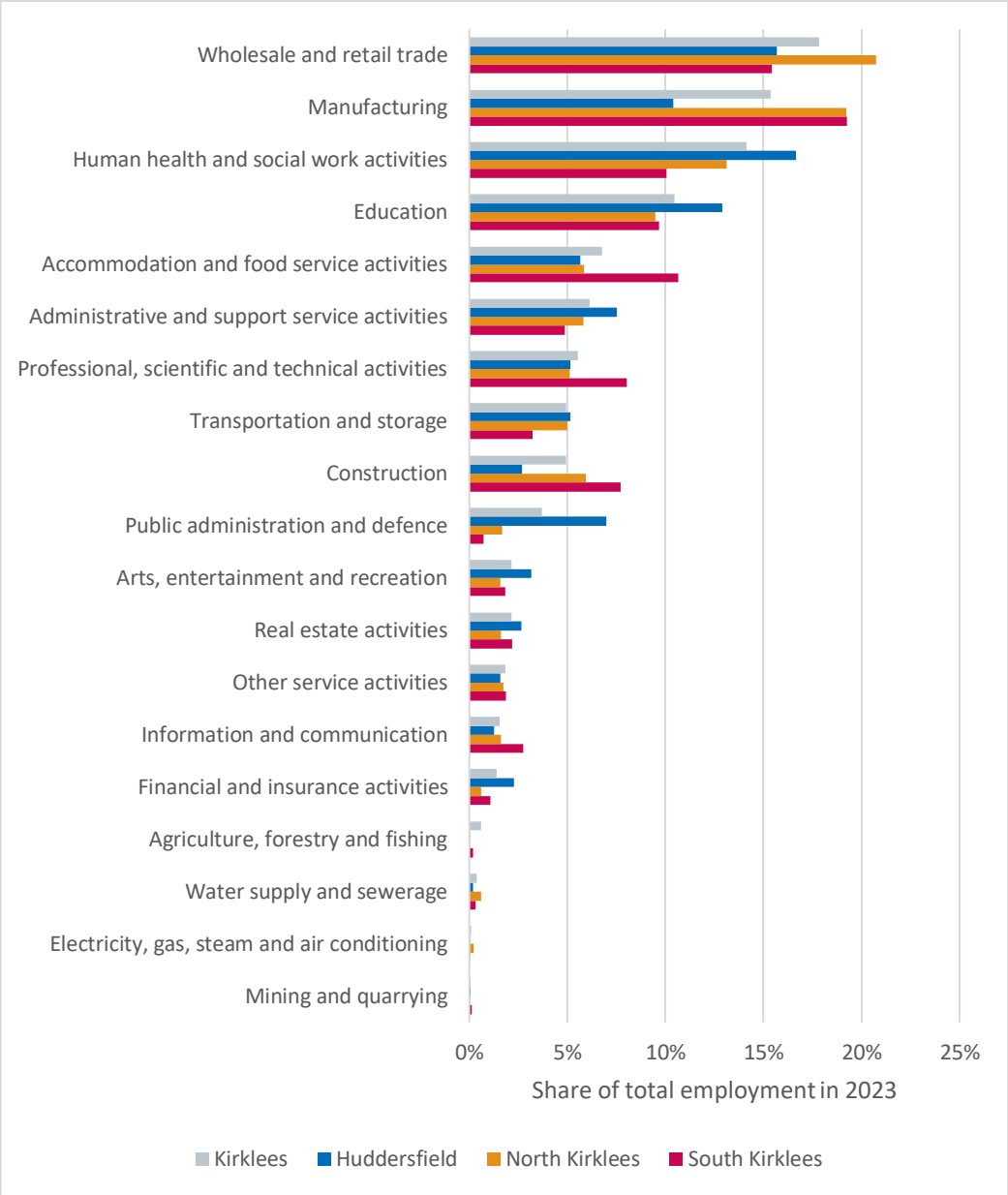
Source: BRES; Turley analysis

3.17 While wholesale and retail trade does remain the largest sector, in proportionate terms, this once again varies in different parts of Kirklees. Other sectors are more prominent in both Huddersfield and South Kirklees, reflecting strengths in human health and manufacturing respectively. North Kirklees does mirror the wider district with its wholesale and retail sector being its largest employer, but manufacturing is much closer behind than it is across the district as a whole. Huddersfield is also notable for having a relatively large education sector reflecting the location of the University of Huddersfield, whereas South Kirklees can be seen to have a relatively large number of

[32] While reported by BRES, the sectors capturing "activities of households as employers" and "activities of extraterritorial organisations and bodies" have been omitted as they are reportedly responsible for zero jobs in Kirklees

jobs in accommodation and food; professional scientific and technical activities; and construction.

Figure 3.6: Comparing the Proportionate Size of Sectors within Kirklees (2023)



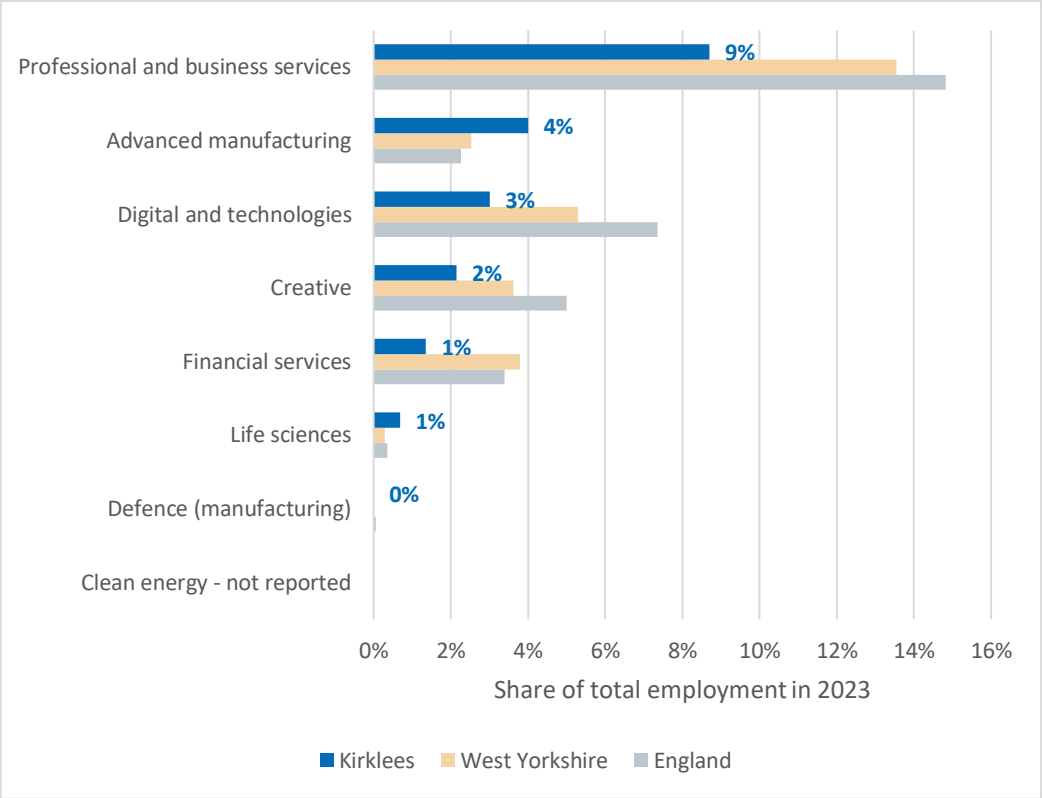
Source: BRES; Turley analysis

3.18 With the previous section having introduced the UK's Modern Industrial Strategy that specifically identified a number of growth driving sectors – known as the IS-8 – it can be observed that these sectors are collectively responsible for as little as a fifth (20%) of all jobs in Kirklees, according to BRES[33]. This places the district in the lower 30% of all authorities when measuring the proportionate representation of the IS-8. It can though be seen to have strengths in some of the individual sectors, offering more jobs in

[33] Department for Business and Trade (June 2025) Industrial Strategy Sector Definitions List. This should be treated as a minimum figure where it uses Standard Industrial Classifications that the Government accepts as being '*too restrictive*' to capture clean energy and most defence activities, aside from manufacturing

advanced manufacturing and to a lesser extent life sciences than West Yorkshire or the country as a whole.

Figure 3.7: Comparing Representation of IS-8 (2023)



Source: BRES; Turley analysis

Business base

3.19 UK Business Counts published by the Office for National Statistics (ONS) provide an indication of change in the profile of businesses in Kirklees, over the plan period to 2024[34]. This is based on "local units" which can be individual sites within a larger enterprise.

3.20 This data suggests that the overall number of local business units in Kirklees has grown by 3,275 over the plan period to date (2013-2024). This represents growth of circa 23%, approaching the 24% increase experienced across West Yorkshire and exceeding that recorded in Yorkshire and the Humber (20%) and the North of England as well as England as a whole (both 22%).

3.21 Where comparable sub-authority data is only available from 2016[35] analysis has been undertaken over this shorter 8-year period to 2024 to explore changing trends across the three sub-areas. This shows that Huddersfield experienced growth of circa 8.5%, similar to North Kirklees (8.1%), albeit South Kirklees performed much more poorly only experiencing a 1.9% growth. It is of note that over this period both Huddersfield

[34] ONS (2024) UK Business Counts
[35] Data at MSOA level is only available from 2016 onwards.

and North Kirklees outperformed the average across West Yorkshire, which saw growth of 6.8%, itself broadly similar to the growth across the North (6.1%) and higher than across Yorkshire and the Humber (5.4%) and England as a whole (5.8%).

3.22 Table 3.3 looks at the authority level and considers the breakdown in the change of businesses by the size of business. This suggests that the divergence from regional and national trends is mostly attributable to a more modest growth in medium businesses within Kirklees, suggesting that growth in this size of business is that which drives overall change in business numbers. Kirklees, West Yorkshire and Yorkshire and the Humber saw lesser growth in the number of such businesses, at 3%, 5% and 6% respectively, than recorded across the North England (10%) or England as a whole (9%).

3.23 Kirklees did, however, see relatively significant growth in large businesses (adding circa 5 businesses of this size, representing growth of 8%), which exceeded that recorded in all other comparator geographies apart from England as a whole (which recorded 10% growth). This provides a useful indicator as to the attractiveness of the district for investment by larger businesses.

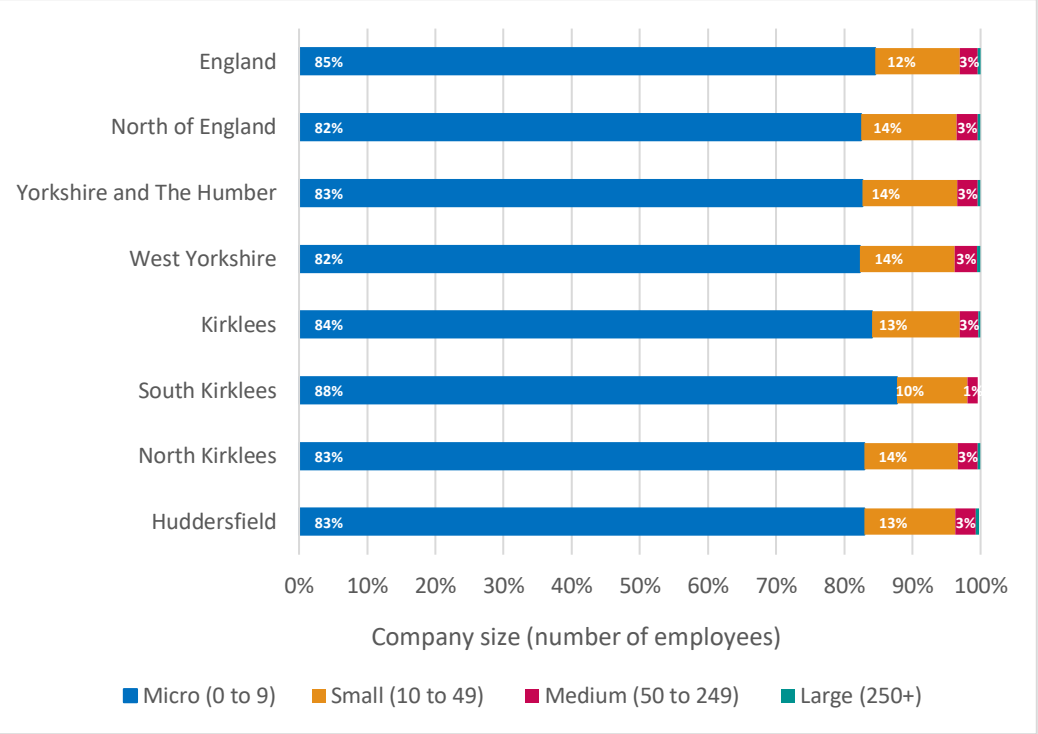
Table 3.3: Change in business base by number of employees (2013-24)

Area	Micro 0 to 9 employees	Small 10 to 49 employees	Medium 50 to 249 employees	Large 250+ employees	**Total**
Kirklees	21%	7%	3%	8%	**19%**
West Yorkshire	22%	10%	5%	2%	**19%**
Yorkshire and the Humber	19%	8%	6%	4%	**17%**
North of England	20%	8%	10%	5%	**18%**
England	20%	9%	9%	10%	**18%**

Source: UK Business Counts; Turley analysis

3.24 As of 2024, the profile of businesses in Kirklees remains broadly in line with that of West Yorkshire, and indeed that recorded across the wider geographies. Fewer than one in five businesses throughout the district employ more than ten employees as shown in Figure 3.8. It is also noted that a similar profile is replicated across each of the three sub-areas, albeit South Kirklees is more distinct in showing the highest proportion (88%) of micro businesses (those employing less than 9) and subsequently a smaller proportion of larger businesses, recording no businesses classified as 'large' (250+ employees).

Figure 3.8: Size of businesses as of 2024 (% of total)

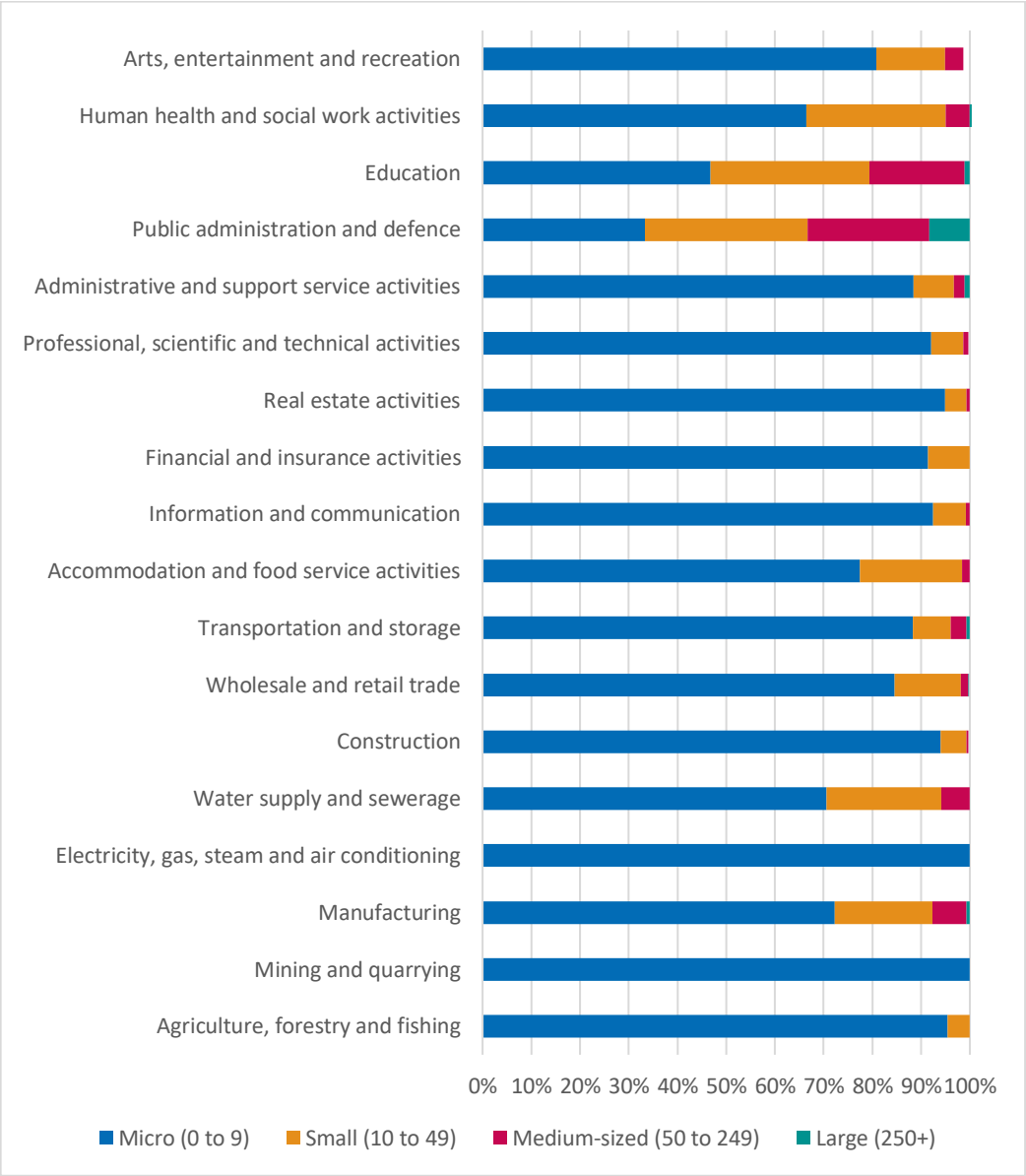


Source: UK Business Counts

3.25 This is considered further for the district as a whole in Figure 3.9, which breaks down for each sector the profile of business sizes. This shows that the larger public sectors of education, public administration & defence and human health and social work, have the largest proportion of non-micro businesses.

3.26 It is interesting to observe that of the "private" sectors it is only manufacturing, administrative and support services and transportation and storage that are recorded as having any large businesses, employing more than 250 people. Again manufacturing and accommodation and food services as well as arts, entertainment and recreation stand out for having higher proportions, excluding the more public or utility sectors, of small and medium sized businesses. It is separately noted that businesses within the professional, scientific and technical sectors in Kirklees are predominately micro, with nearly all other businesses in the sector classified only as small.

Figure 3.9: Comparing the Proportionate Size of Businesses by Industry within Kirklees (2024)

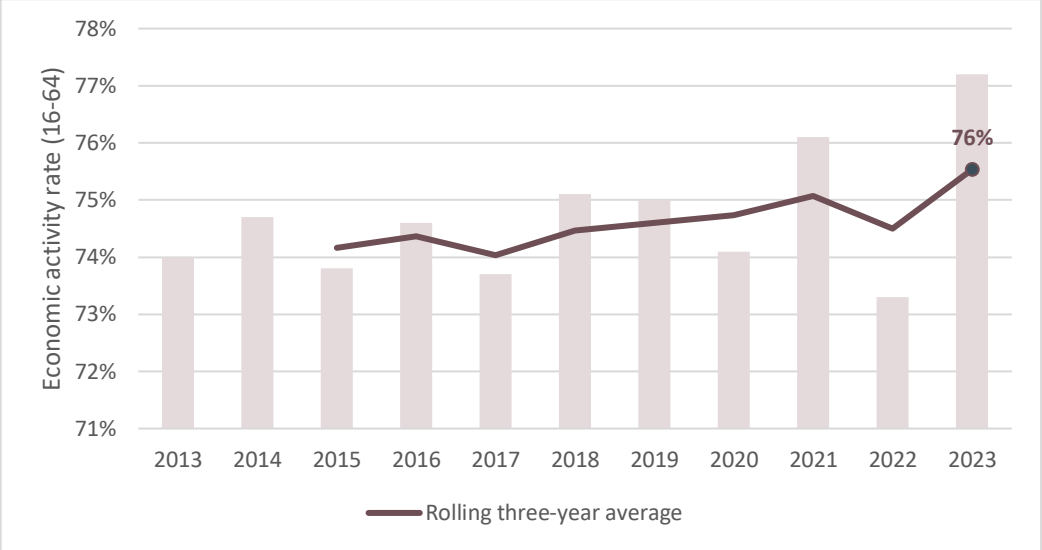


Source: UK Business Counts

Resident labour force

3.27 The resident labour force of Kirklees appears to have responded to the job growth that has occurred in the district. While the Annual Population Survey (APS) is inherently volatile, a smoother three-year rolling average suggests that a growing proportion of the working-age population – aged 16 to 64 – have been economically active.

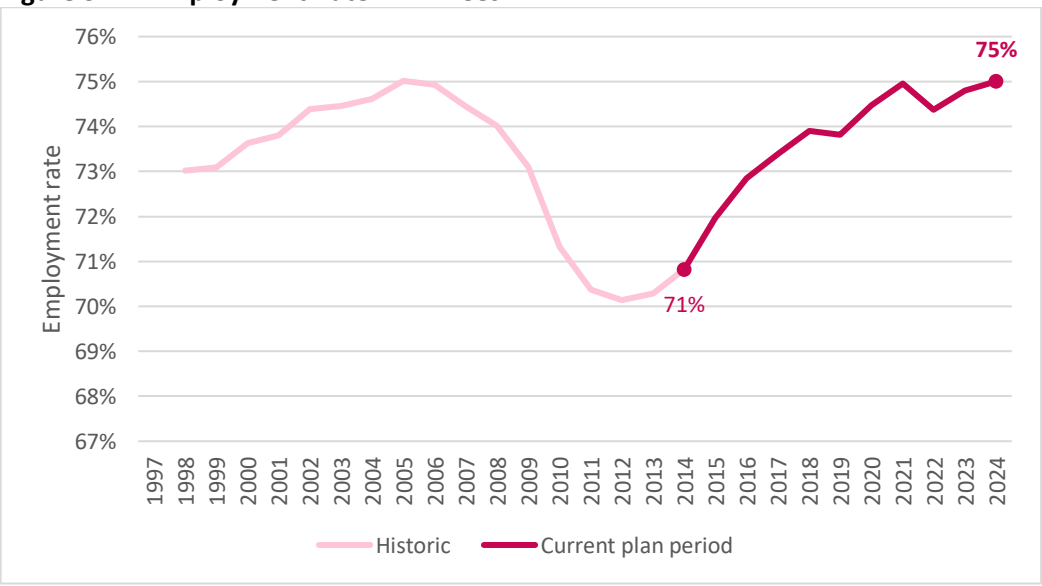
Figure 3.10: Economic Activity Rate amongst Working Age Residents of Kirklees



Source: APS; Turley analysis

3.28 This general trend is also shown in the REM, which reports on the *employment* rate as a slightly different measure that establishes the number of adults aged 16 or above who are in work. This suggests that there has been a strong recovery from the low recorded at the start of the plan period, to the point where 75% of adults are reportedly in work as of 2023. This notably achieves the target set by the current Local Plan, as introduced in section 2.

Figure 3.11: Employment Rate in Kirklees



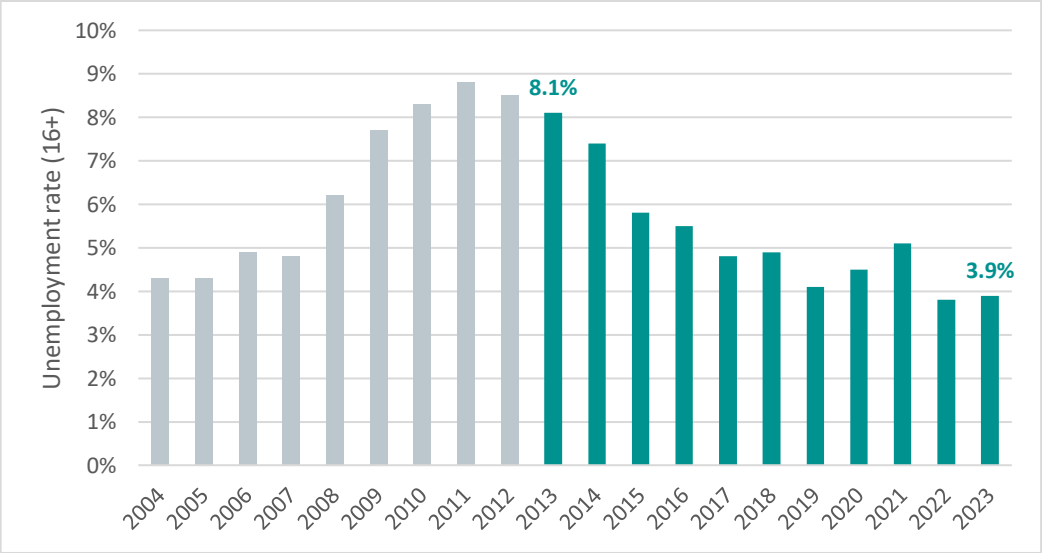
Source: REM

3.29 Model-based estimates of unemployment, developed by the ONS to measure the number of unemployed residents as a proportion of all economically active adults[36]

[36] ONS (2024) Model-based estimates of unemployment

(16+) also indicate an improvement. The unemployment rate in Kirklees is reported to have more than halved over the plan period, falling from around 8% in 2013 to circa 4% in 2023 which is the last complete year reported at the time of writing. The latter represents the second-lowest rate of unemployment for almost two decades, having been bettered only in 2022.

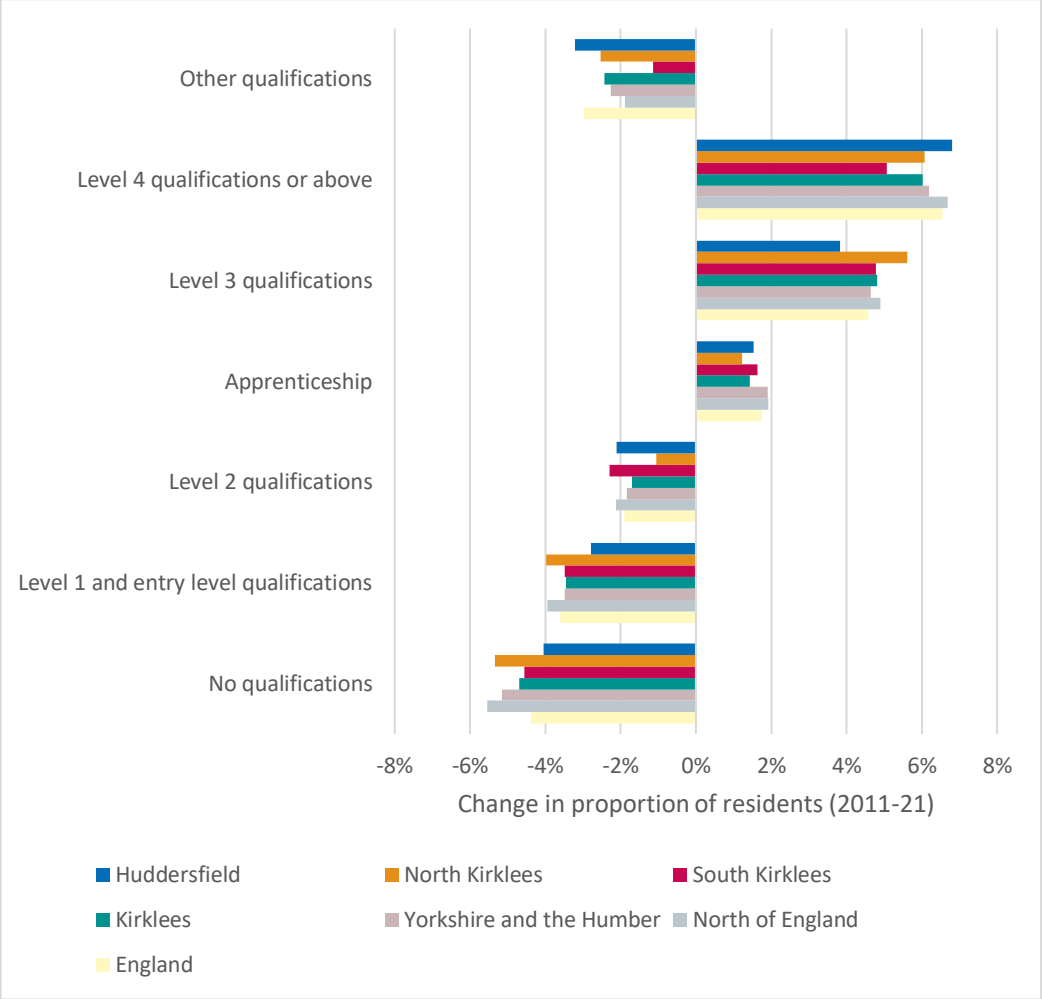
Figure 3.12: Unemployment Rate in Kirklees (2004-23)



Source: ONS

3.30 Educational attainment and skills within Kirklees and its sub-markets also appear to have improved over the plan period to date, even if this is only available from the Census which reports on a slightly different period (2011-21). Figure 3.13 shows that there has been an overall shift towards higher qualification levels, in line with trends seen elsewhere. The proportion of people with no qualifications and lower-level qualifications (Level 1 and Level 2) has declined consistently, with "No qualifications" dropping by 4–6% across regions. Conversely, there has been a notable increase in Level 3 and especially Level 4 qualifications or above, with the latter rising by 5–7% in most areas, indicating a significant upskilling of the population. Apprenticeships have seen modest growth (1–2%), while the proportion of people with other qualifications has declined slightly.

Figure 3.13: Change in Residents' Highest Level of Qualification (2011-21)



Source: ONS

Summary

3.31 Kirklees evidently continues to share a functional relationship with other parts of the LCR, with the proportion of commuting residents remaining in this area having slightly increased from 92% to some 93% over the decade to 2021. While all but a quarter of jobs are filled by its own residents, the district also continues to draw labour from other parts of the LCR. North Kirklees stands out in this regard since a third of its jobs are filled by people living outside the district, and some 42% of its commuting residents travelled elsewhere.

3.32 Kirklees has been successful in creating new employment opportunities over recent years. Some 9,318 jobs are reported to have been created over the decade to 2023, equating to approximately 932 jobs per annum or an average growth rate of 0.6% per annum.

3.33 Whilst this represents a growing economy it has notably fallen short of the target of the adopted Local Plan, where its ambition of creating 23,000 jobs over 18 years translates into an average of 1,278 jobs per annum. The rate of growth has also fallen

behind comparator geographies with West Yorkshire experiencing twice as much growth on a proportionate basis (1.2%) despite itself lagging behind the country as a whole (1.4%). In line with sub-regional and local strategies reviewed in section 2 this emphasises the importance of increasing the performance and resilience of the local economy if it is to bridge this sustained gap.

3.34 The rate of growth has equally not been uniform within the district itself. Huddersfield and to a lesser extent South Kirklees have performed better, averaging 0.9% and 0.8% per annum respectively, but still lag behind West Yorkshire. North Kirklees has performed more poorly having grown employment levels by only 0.4% per annum on average over this period, albeit while continuing to offer the greatest number of jobs in absolute terms.

3.35 Analysis of the individual sectors of the economy at the district level reveals that five sectors have made a more significant contribution to growth in terms of employment. These include manufacturing and human health, which both remain amongst the three largest employers in proportionate terms. Other strongly performing sectors include accommodation and food services, administrative and support services and transportation and storage. In contrast a pronounced number of jobs were lost in wholesale and retail trade, albeit it still remains the largest sector in proportionate terms.

3.36 The growth in job numbers has also been mirrored in a growth of business units, with an additional 3,275 recorded over the plan period to date (2013-24). This represents a rate of growth which outpaces the national average and the regional averages but is slightly lower than that seen across West Yorkshire. It is interesting to note that in contrast to employment growth within Kirklees it is South Kirklees which performed poorest over the period for which comparable data is available (2016-24).

3.37 Kirklees has seen relatively modest growth in the number of medium sized businesses, which contrastingly appear to have been driving growth at the regional and national level. The district has though performed comparatively well in growing its representation of large businesses, presumably either by attracting new businesses of this scale to locate in Kirklees or facilitating the growth of medium sized businesses into this category. It remains the case in Kirklees, in line with wider geographies, that the vast majority – more than four in every five businesses – are classified as 'micro' (less than 9 employees). Outside of utilities and public sector it appears to be the manufacturing and accommodation and food service sectors which see greater proportions of larger businesses.

3.38 In supporting the growth of the local economy Kirklees has positively seen the proportion of economically active working age residents increase, standing at just over 77% in 2023 and improving on 74% in 2013. In parallel unemployment has continued to fall, recorded at only 3.9% in 2023, which is notably lower than the 8.1% recorded at the start of the plan period in 2013. It is equally positive to see that the labour force has shown clear evidence of upskilling with residents becoming increasingly likely to have degree-level qualifications, with fewer having no qualifications.

4. Property Market Review

4.1 This section provides a commercial market review of Kirklees, with an emphasis on highlighting and understanding the variation within the district. Market insight is provided by Aspinall Verdi and complemented by an analysis of a range of market signals using secondary datasets. Further insights have been obtained via a business survey, summarised at **Appendix 1**.

Property market context

4.2 North Kirklees is well placed for the motorway network which includes the M62 and M1 and predominantly consists of B2 and B8 uses. There are well established business clusters to the south and east of Dewsbury. The employment areas off J26-27 of the M62 provide the most suitable locations for storage and distribution operations.

4.3 Huddersfield is identified as well placed to take advantage of its close proximity to J23–25 of the M62. Public transport is also strong in the general area with Huddersfield being the main public transport hub for bus and rail, with the Transpennine Route Upgrade and upgrades to Huddersfield Bus Station strengthening this role. Huddersfield is home to some of the district's advanced manufacturing companies and creative industries, some of which continue to grow.

4.4 The A62 corridor is of strategic significance to the Council's employment growth aspirations. Improvements have recently been made to both alleviate congestion and improve air quality, and a second phase is planned at Cooper Bridge to further enhance this important corridor.

4.5 South Kirklees is seen as significantly different and consists of much smaller towns and settlements separated by large expanses of Green Belt. In general, and particularly in the west, much of the employment stock has formed along the river valley bottoms.

4.6 Much of the employment stock here is more isolated in terms of proximity to existing markets and the strategic road networks and is less accessible by public transport.

4.7 The M62 corridor (J25-27 in particular), the Leeds Road corridor, and to a lesser extent the Wakefield Road corridor in the south-east of the district, represent key strategic locations and are important assets for Kirklees.

4.8 One of the most important aspects of larger, more strategic, requirements is proximity to the M62. Cleckheaton and Birstall are examples of areas that benefit from their proximity to the M62 but are not driven by it, being established locations in their own right.

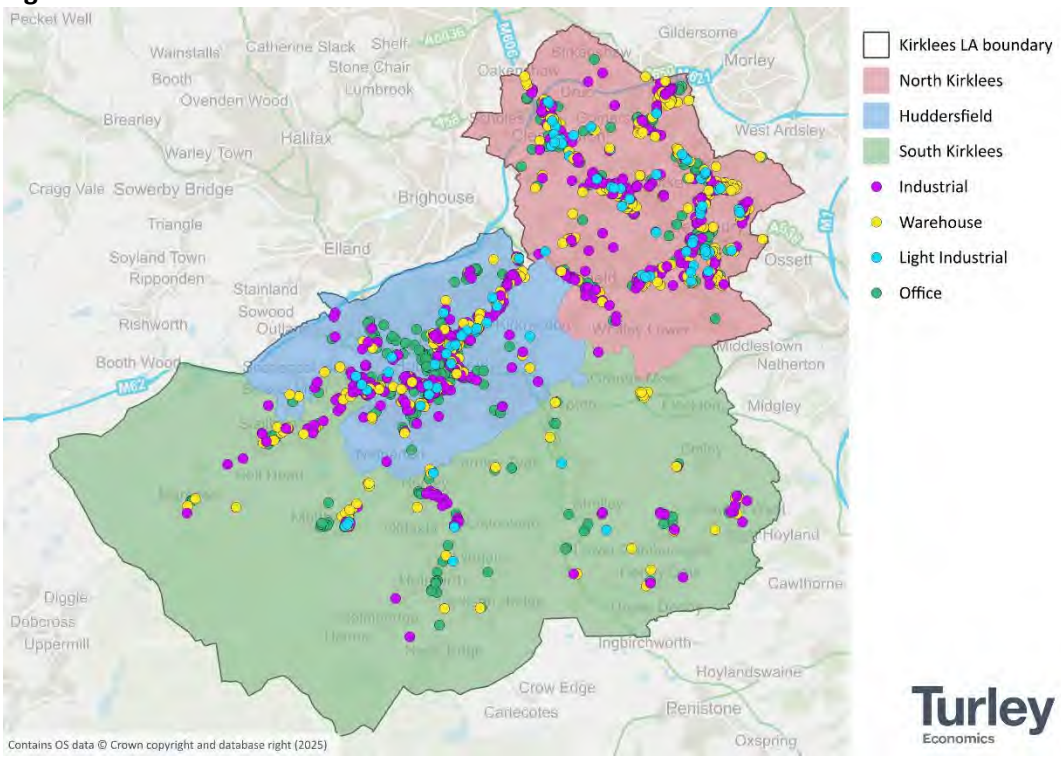
4.9 In respect of the industrial sector, Cleckheaton, Batley, Dewsbury and Birstall are all considered solid locations, along with the M62 corridor. South Kirklees is considered rural and therefore caters more appropriately for local yet indigenously important demand. Whilst the M1 is a valuable asset for the east side of Kirklees, its proximity to the remainder of Kirklees limits its impact.

Understanding Kirklees' offer

4.10 CoStar's commercial property database allows the existing stock of offices, industrial premises and warehouses in Kirklees to be profiled in more detail.

4.11 Figure 4.1 shows the location of each such building recorded by CoStar. It highlights proximity to key road links and clustering in larger settlements. The rural nature of South Kirklees is apparent in this regard with a much lower density of commercial stock in this area.

Figure 4.1: Kirklees' Stock of Premises



Source: CoStar; Turley analysis

4.12 Table 4.1 provides a further summary, confirming that South Kirklees offers only around half as many commercial premises as Huddersfield, which in turn has less than North Kirklees. The latter tends to offer the largest spaces, albeit this does change when focusing on particular types of property. While North Kirklees and Huddersfield have the largest industrial premises (2,899sqm and 2,587sqm respectively), it is Huddersfield that offers the largest offices and South Kirklees where warehouses are the largest on average.

Table 4.1: Commercial Floorspace Stock in Kirklees, 2025

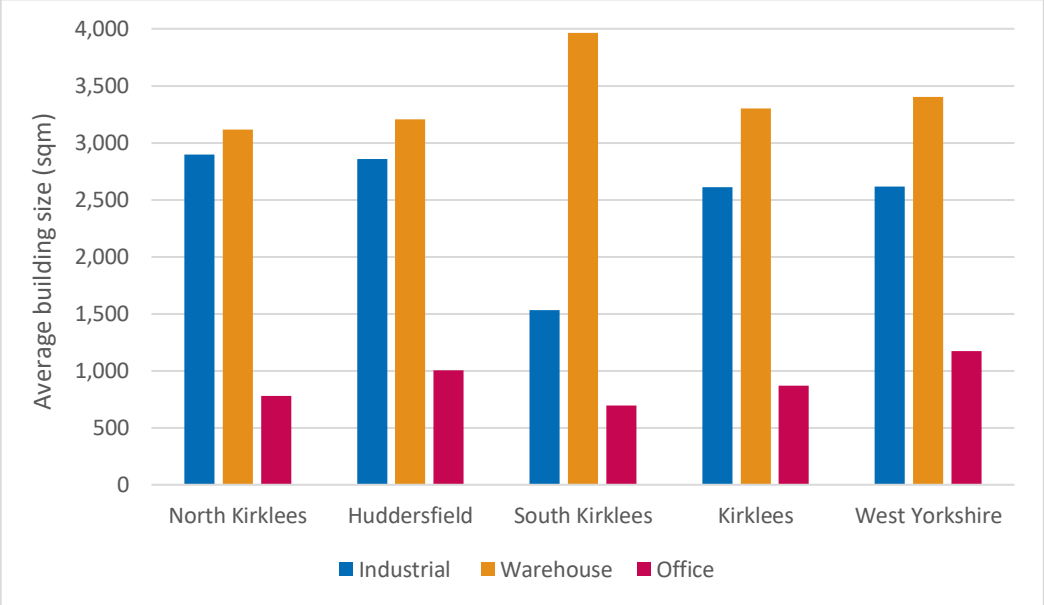
Area	Properties	Floorspace (sqm)	Size of average building (sqm)
North Kirklees			
Industrial	274	794,349	2,899
Warehouse	211	657,589	3,117
Office	205	160,307	782
All types	690	1,612,246	2,337
Huddersfield			
Industrial	196	559,949	2,857
Warehouse	121	388,012	3,207
Office	243	244,543	1,006
All types	560	1,192,504	2,129
South Kirklees			
Industrial	117	179,508	1,534
Warehouse	77	305,250	3,964
Office	87	60,631	697
All types	281	545,389	1,941
Kirklees			
Industrial	588	1,534,164	2,609
Warehouse	409	1,350,852	3,303
Office	535	465,481	870
All types	1,532	3,350,498	2,187

Note: Industrial figures are exclusive of warehouses for illustrative purposes. Figures for warehouses are presented separately.

Source: CoStar; Turley analysis

4.13 The average commercial property in Kirklees is generally of a comparable size to those in West Yorkshire, although certain types of premises can be smaller. Notably, office spaces in Kirklees average 870 sqm, rising only to 1,006sqm in Huddersfield specifically, with either falling below the West Yorkshire average of 1,175 sqm to suggest a prevalence of smaller-scale offices in the district. Similarly, industrial premises in Kirklees (2,609 sqm) align with the regional average (2,613 sqm), suggesting that industrial building sizes are broadly consistent across the region. However, when examining Kirklees internally, South Kirklees lags behind significantly at just 1,534sqm, suggesting that the industrial activity here is either more constrained by space or oriented toward smaller-scale operations. In contrast, South Kirklees stands out with the largest warehouse properties, at 3,964sqm, significantly above both the Kirklees (3,303sqm) and West Yorkshire averages (3,400 sqm).

Figure 4.2: Comparing size of commercial property in Kirklees and West Yorkshire



Source: CoStar; Turley analysis

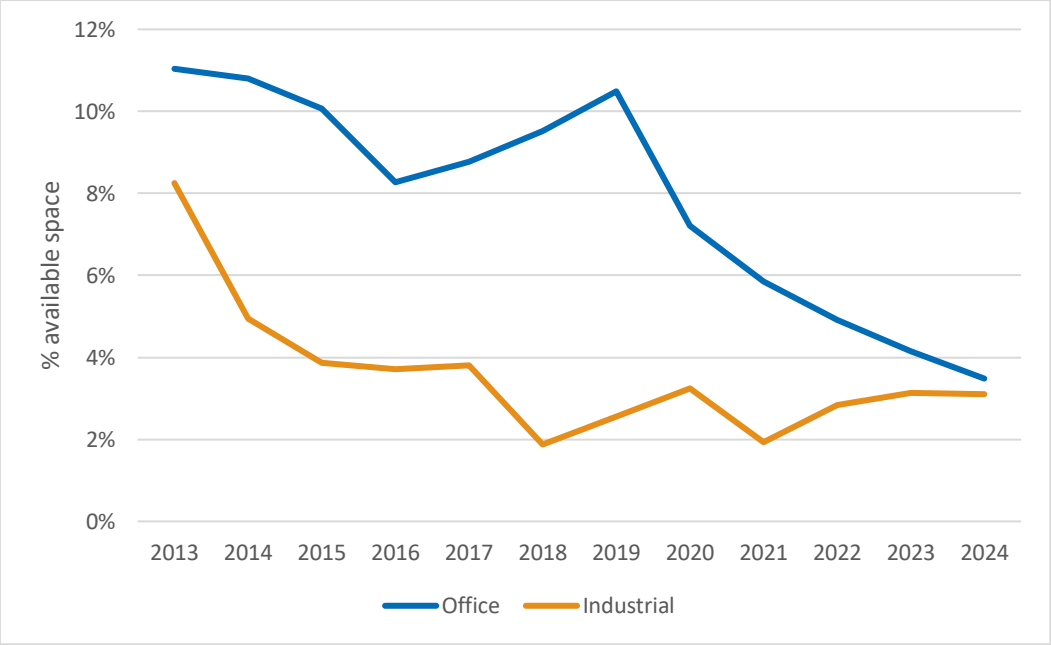
4.14 CoStar also records the amount of space that is currently available, which reveals important variations within Kirklees even if it should be recognised that certain spaces have been on the market for some time. North Kirklees has the highest overall availability (4.3%), driven by strong levels in industrial (4.7%) and office (6.9%) space, suggesting capacity for manufacturing and office growth. Huddersfield stands out for its high office space availability (16.8%), notably above the district average (12.4%) but it has very limited industrial (0.2%) and warehouse (1.5%) space available. South Kirklees shows the lowest overall availability (3.3%) and has no available industrial space, indicating either high occupancy or limited stock. Its warehouse (3.3%) and office (9.0%) availability are moderate.

4.15 The availability rate for both offices and industrial premises – the latter unavoidably including warehouses[37] – has generally declined over the period from 2013 to 2024,

[37] Note: Warehouses are here included within the figures for industrial premises, as separate availability data for warehousing units is not available.

reflecting tightening supply, potentially losses and possibly increasing occupancy rates across both sectors. For industrial premises, availability dropped from 8% in 2013 to a more stable range of 2-4% from 2015 onwards, suggesting consistent demand and a relatively well-utilised industrial property stock. In contrast, office space availability started higher at 11% in 2013-2014, indicating a more oversupplied or underutilised market. Although availability remained around 10% through 2019, it began to decline more noticeably from 2020 onward, reaching just 3% in 2024.

Figure 4.3: Availability rates for industrial and office premises in Kirklees from 2013 to 2024



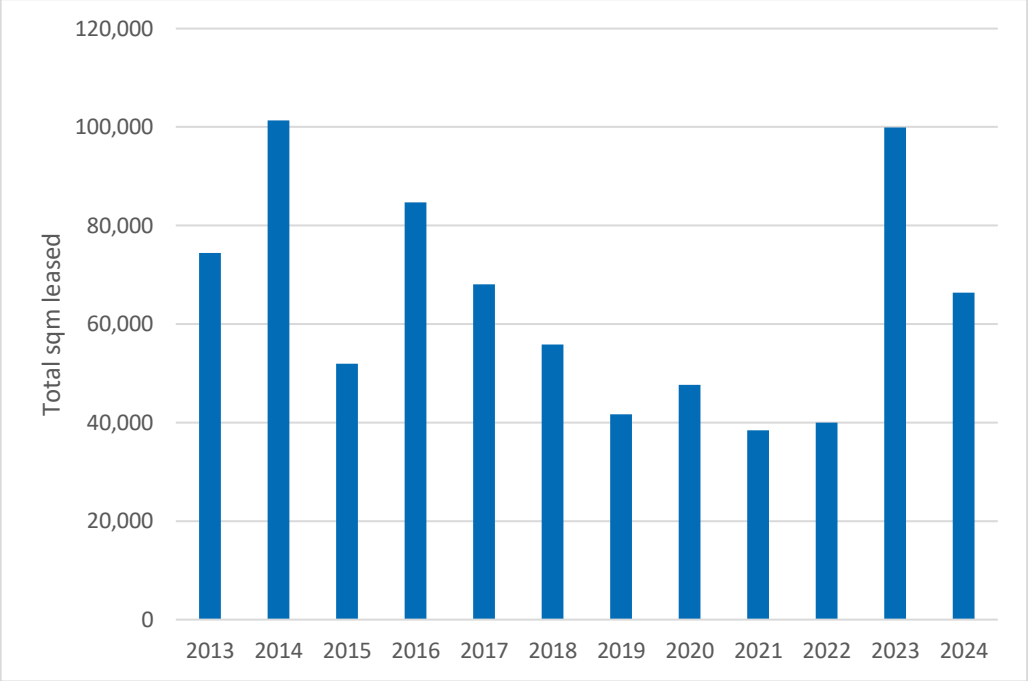
Source: CoStar; Turley analysis

Market activity

4.16 CoStar separately reports on the amount of commercial space that has been leased in Kirklees over the current plan period to date.

4.17 This is initially summarised for industrial premises, again including warehouses, at Figure 4.4 overleaf. This reveals that there has been fluctuation in the amount of industrial space leased each year. The peak was in 2014 when over 100,000 sqm was leased, and although this subsequently more than halved it rebounded strongly in 2016 and again in 2023. Despite these spikes, the general trend was downwards from 2016 to 2022, followed by another notable increase before dropping again in 2024. Although it declined in the following years, the amount of space let remained substantially higher than in the early years of the plan period.

Figure 4.4: Total industrial space leased per year (2013 – 2024)

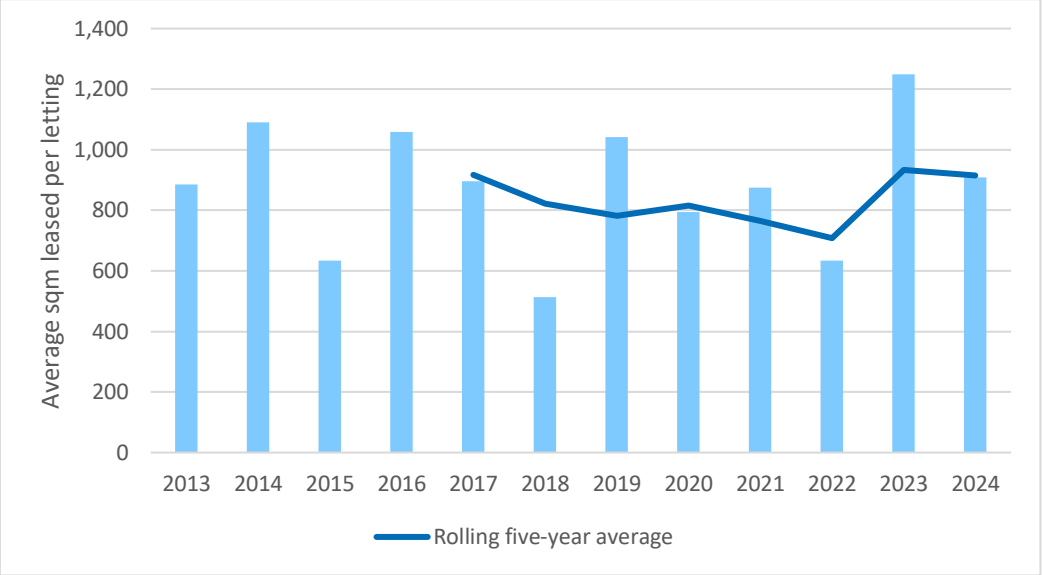


Source: CoStar; Turley analysis

4.18 The average amount of space leased per transaction similarly varied considerably, as shown at Figure 4.5 overleaf. Notable peaks occurred in 2014 (1,090 sqm), 2016 (1,058 sqm), 2019[38] (1,043 sqm), and especially in 2023, which reached the highest average of the period at 1,250 sqm. In contrast, significant dips were observed in 2015 (634 sqm), 2018 (513sqm) and 2022 (also 634 sqm). These fluctuations suggest a volatile market, influenced potentially by changing economic conditions, availability of industrial space and varying demand over the years. The rolling five-year average does though potentially reveal that there was a favouring of increasingly small premises up to 2022, which subsequently reversed.

[38] This was the year in which the fewest leases were recorded

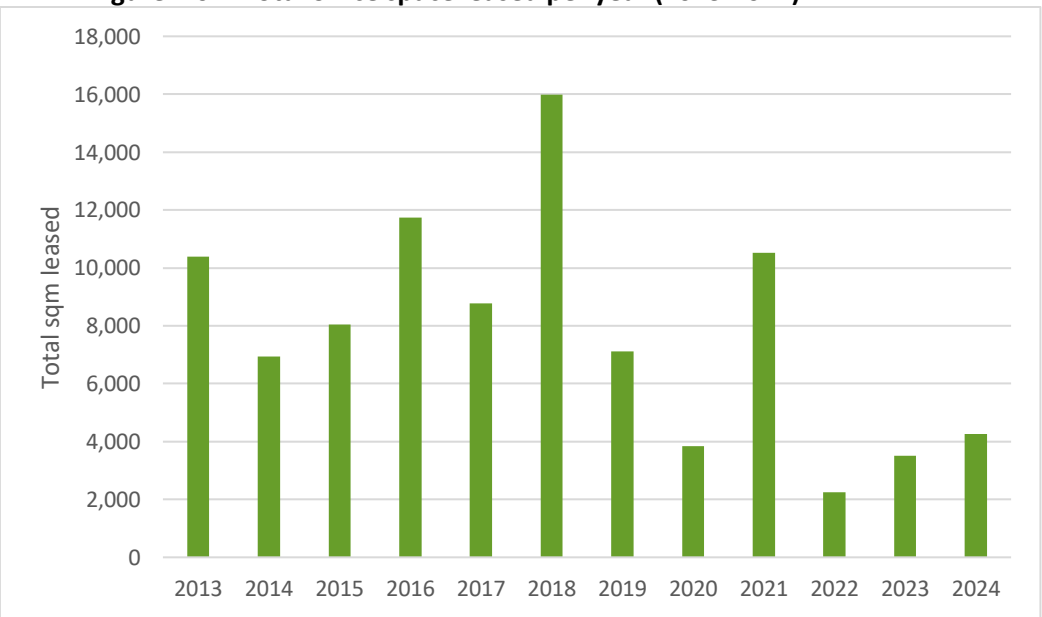
Figure 4.5: Variation in the average amount of industrial space leased (2013-2024)



Source: CoStar; Turley analysis

4.19 Office space leasing shows a pattern of sharp fluctuations, with no sustained growth trend. Activity was relatively strong early in the plan period, with peaks in 2016 (11,727 sqm) and especially in 2018, which marked the highest level at 15,989 sqm. However, after 2018, the data reveals a notable decline, particularly in 2020 (3,838 sqm), 2022 (2,246 sqm) and 2023 (3,516 sqm), likely reflecting changing work patterns such as the shift toward remote or hybrid working arrangements. Although there was a moderate rebound in 2021 (10,521 sqm) and a slight increase in 2024 (4,255 sqm), the overall trend post-2018 suggests a reduced demand for office space.

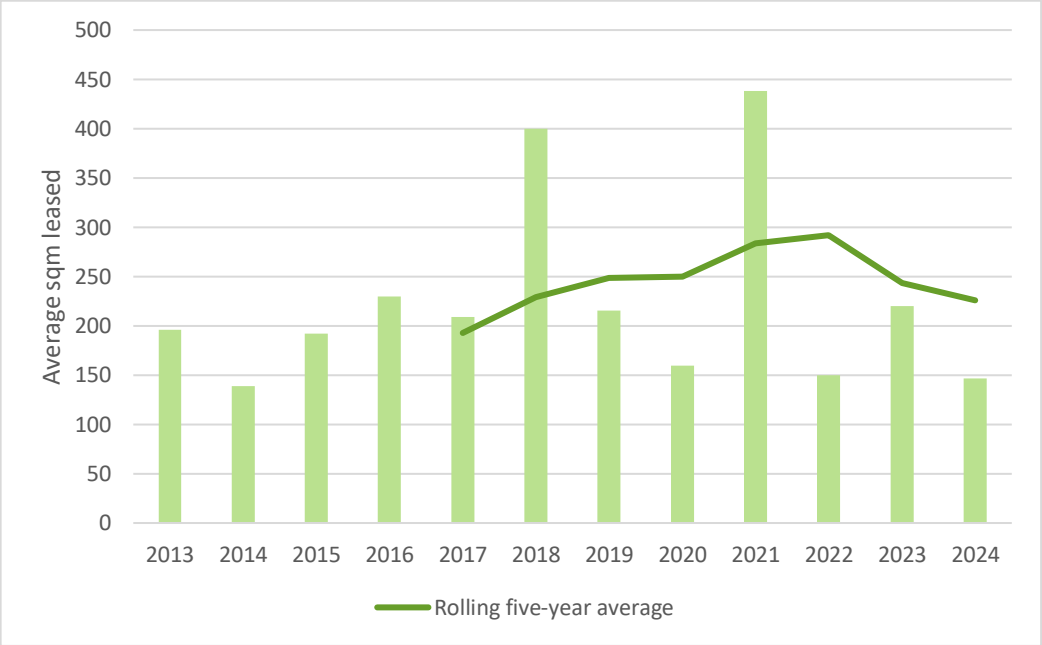
Figure 4.6: Total office space leased per year (2013-2024)



Source: CoStar; Turley analysis

4.20 The trend in the average amount of office space leased aligns with the above, showing significant volatility. While the early years (2013-17) showed moderate averages between 139 and 230 sqm, there were notable spikes in 2018 (400 sqm) and 2021 (438 sqm), with this serving to increase the average amount of space taken over rolling five-year periods. However, as with the overall trend shown above, the average letting shrank in size again after 2021, with the average occupier taking only 147 sqm by 2024 – nearly half the average over five years to 2022. This suggests that not only is less office space being leased overall, but the nature of leases has also shifted in favour of smaller units, possibly due to downsizing or businesses opting for more flexible space arrangements.

Figure 4.7: Variation in the average amount of office space leased (2013-2024)

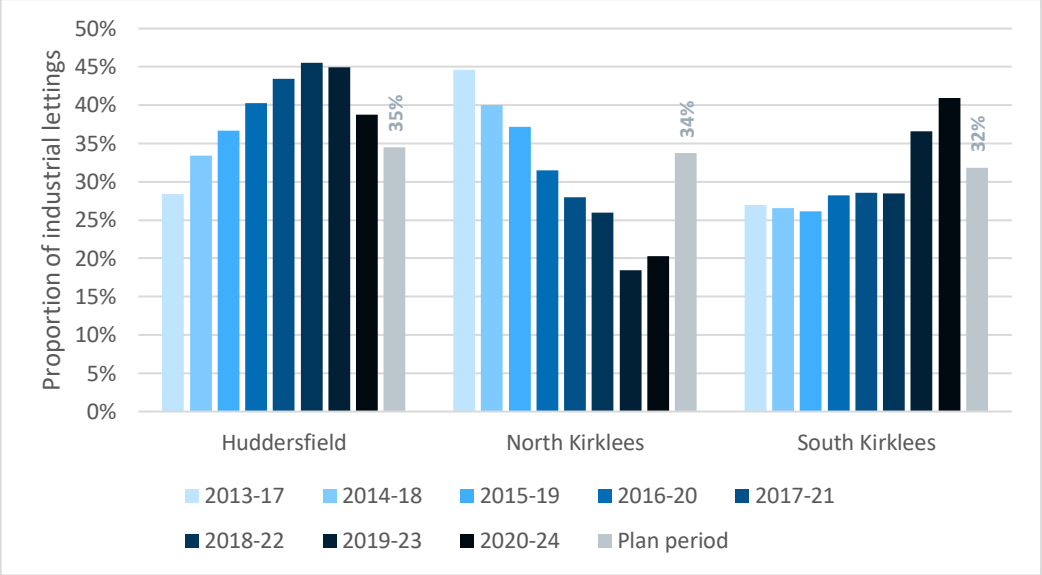


Source: CoStar; Turley analysis

4.21 While the above relates to the entirety of Kirklees, the same data can also be used to understand differences between the three market areas.

4.22 Each appears to have recorded a broadly comparable number of industrial lettings over the current plan period to date, albeit with Huddersfield having the largest share (35%). This has though evolved during this time, as shown when reviewing trends over rolling five-year periods at Figure 4.8 to smooth annual volatility. South Kirklees can be seen to have latterly accommodated a growing proportion of all industrial lettings whereas increasingly few have been in North Kirklees.

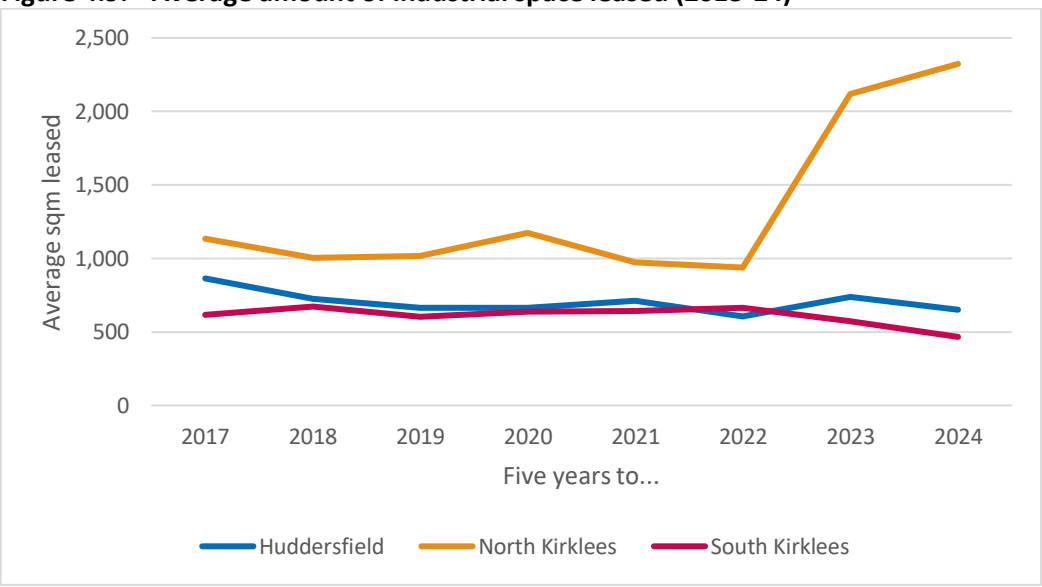
Figure 4.8: Changing spatial distribution of industrial lettings in Kirklees (2013-24)



Source: CoStar; Turley analysis

4.23 North Kirklees has though still been responsible for more than half (51%) of the industrial *space* taken up during the current plan period, as businesses there have increasingly tended to lease larger premises than has been the case elsewhere. The amount of industrial space being taken by each business has also recently risen in North Kirklees, when again using rolling five-year averages at Figure 4.9 to smooth volatility. The amount of industrial space being taken in South Kirklees has contrastingly fallen, being more stable in Huddersfield.

Figure 4.9: Average amount of industrial space leased (2013-24)

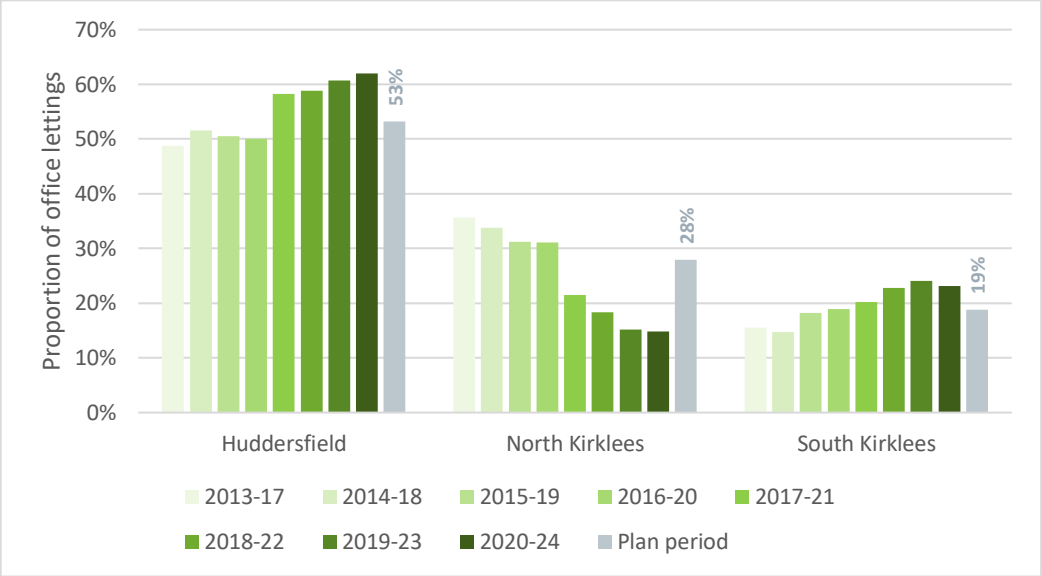


Source: CoStar; Turley analysis

4.24 Turning to offices, Huddersfield can be seen to have played a particularly key role in meeting demand for this type of space during the current plan period, being responsible for slightly more than half (53%) – though a latterly greater proportion – of

all office lettings. While North Kirklees is the next most popular destination, recording 28% of all office lettings, it has accounted for barely half as many – only 15% – over the last five years. South Kirklees has steadily increased its share, in contrast.

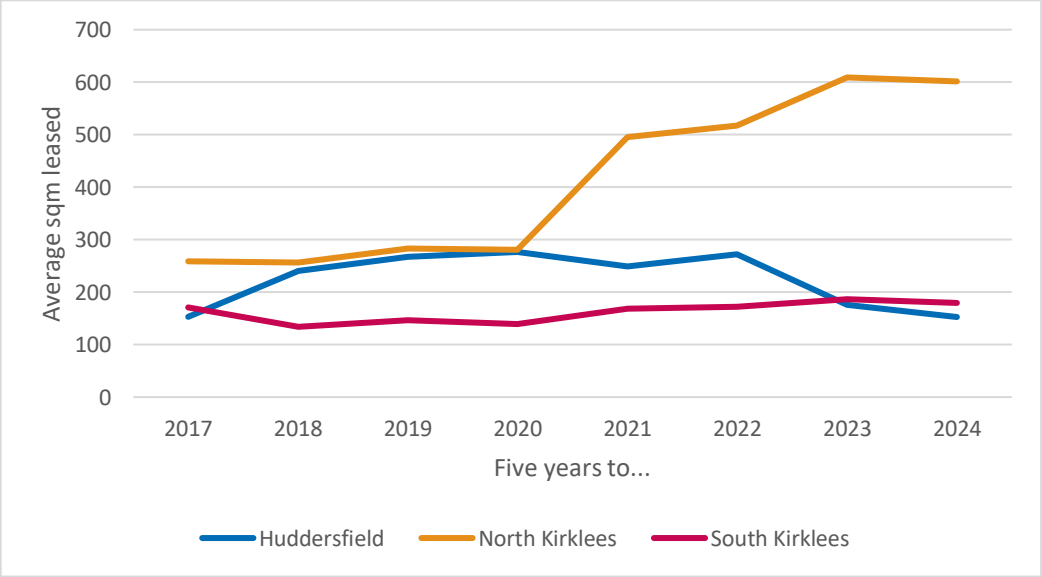
Figure 4.10: Changing spatial distribution of office lettings in Kirklees (2013-24)



Source: CoStar; Turley analysis

4.25 A slightly smaller proportion (47%) of the office *space* leased in Kirklees has been in Huddersfield, with North Kirklees more prominent according to this measure is a sign that businesses take more space in this area. This has again been rising during the plan period, with the average letting involving over 600sqm of space over the last five years – over three times more than in South Kirklees or Huddersfield, where the average letting has contrastingly become smaller.

Figure 4.11: Average amount of office space leased (2013-24)



Source: CoStar; Turley analysis

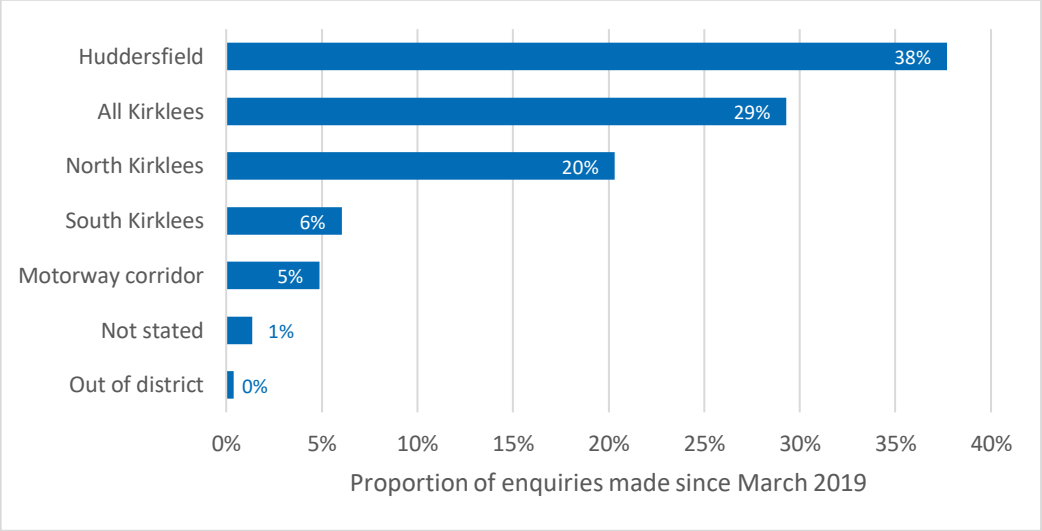
Enquiries

4.26 While the above has summarised lettings recorded by CoStar, the Council possesses further insight into demand in the form of land and property enquiries.

4.27 Since monitoring began in March 2019, through to June 2025, a total of 512 enquiries are believed to have been made, over two thirds (68%) originating from existing businesses already based in Kirklees with the remainder representing inward investment[39]. Over a fifth of these enquiries (112) are believed to have been active when this data was shared.

4.28 Enquiries have been most often made for land and property in Huddersfield, but almost as many have sought space anywhere in the district. Around one in five enquiries have been for spaces in North Kirklees, which is over three times the number that relate to South Kirklees.

Figure 4.12: Distribution of enquiries by geography

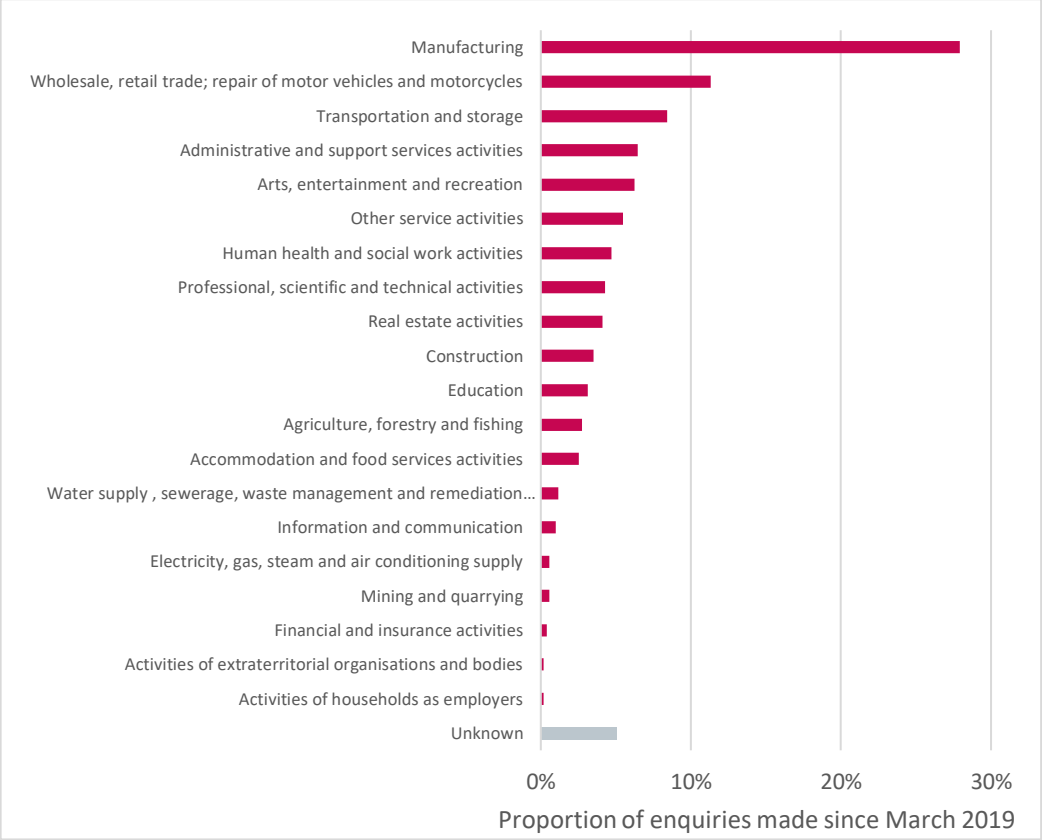


Source: Council records

4.29 The Council also records the broad sector in which businesses making enquiries operate, albeit this is not always known. Circa 28% have been manufacturers, while a further 11% were operating in the wholesale and retail trade.

[39] Either businesses new to Kirklees or foreign

Figure 4.13: Enquiries by broad sector



Source: Council records

4.30 Huddersfield was preferred over North or South Kirklees by the enquiring businesses operating in all but three of the sectors stated above[40]. Half of the sectors did though see a greater proportion seeking land or property anywhere in the district, rather than in a specific location.

Table 4.2: Preferred location of enquiring businesses by sector

Sector	Enquiries	All Kirklees	Huddersfield	North Kirklees	South Kirklees	Other
Manufacturing	**143**	20%	30%	28%	11%	10%
Wholesale & retail	**58**	36%	41%	21%	0%	2%
Transportation & storage	**43**	30%	37%	19%	5%	9%
Administrative & support	**33**	18%	48%	21%	6%	6%

[40] Enquiries relating to the information and communication sector were evenly distributed between the three areas, while the two enquiries from financial and insurance businesses respectively sought space in Huddersfield and North Kirklees. "Activities of households as employers" was the other outlier, with the single enquiry seeking space anywhere in the borough

Sector	Enquiries	All Kirklees	Huddersfield	North Kirklees	South Kirklees	Other
Arts, entertainment & recreation	**32**	25%	53%	13%	9%	0%
Other service activities	**28**	36%	32%	29%	4%	0%
Human health & social work	**24**	46%	42%	13%	0%	0%
Professional, scientific & technical	**22**	5%	64%	18%	9%	5%
Real estate activities	**21**	52%	38%	5%	0%	5%
Construction	**18**	39%	33%	17%	6%	6%
Education	**16**	19%	38%	31%	6%	6%
Agriculture, forestry & fishing	**14**	64%	21%	0%	14%	0%
Accommodation & food services	**13**	46%	38%	8%	8%	0%
Water supply & sewerage	**6**	50%	33%	0%	0%	17%
Information & communication	**5**	20%	20%	20%	0%	40%
Mining & quarrying	**3**	67%	33%	0%	0%	0%
Electricity & gas	**3**	67%	33%	0%	0%	0%
Financial & insurance activities	**2**	0%	50%	50%	0%	0%
Households as employers	**1**	100%	0%	0%	0%	0%
Extraterritorial organisations	**1**	0%	100%	0%	0%	0%
All sectors	**486**	**30%**	**38%**	**20%**	**6%**	**6%**

Source: Council records

Summary

4.31 Kirklees offers a range of offices, industrial premises and warehouses, many of which are clustered in larger settlements and/or along key transport corridors such as the M62 and M1. South Kirklees has the least and its premises are generally smaller, with the exception of its relatively large warehouses. North Kirklees has not only the most premises but also the largest, on average, albeit Huddersfield offers only slightly fewer and its warehouses and particularly offices also tend to be slightly larger. Even these do though remain smaller than is typical in West Yorkshire.

4.32 Availability rates have generally reduced over the last decade, though tend to be higher in North Kirklees and in Huddersfield's offices.

4.33 There has been fluctuation in the amount of industrial space leased in Kirklees, and in the average amount of space typically taken by occupiers, with this signifying a volatile market that has potentially been influenced by wider economic conditions. The lettings recorded since 2013 have been relatively evenly split between the three market areas,

though South Kirklees has been recently meeting a greater share of demand at the apparent expense of North Kirklees. The latter area has though still been responsible for more than half of the industrial *space* taken up, as businesses there have increasingly tended to lease larger premises than their counterparts elsewhere.

4.34 There has likewise been fluctuation in the office market, albeit with a general reduction in the total amount of space being leased. Businesses have generally been favouring smaller premises, possibly due to downsizing or a shift towards more flexible space arrangements. North Kirklees does though appear to have bucked this trend, with the average business having taken over twice as much space over the last five years as their contemporaries five years prior. This is despite the area having accommodated a smaller share of the district's lettings.

4.35 The Council's monitoring suggests that around two thirds of enquiries, back to March 2019, have been from existing businesses already based in Kirklees with the remainder being inward investments. They have most often sought land and property in Huddersfield but almost as many would have located anywhere in Kirklees, and this was particularly prevalent for businesses operating in certain sectors. Circa 28% of all enquiries have come from manufacturing businesses and a further 11% operated in the wholesale and retail trade.

5. Need Scenarios

5.1 This section seeks to quantify the amount of employment land needed in Kirklees over the period that is being covered by the new Local Plan (2024-43). It outlines an approach that is considered to adhere to the current PPG by using '*a range of data which is current and robust*'[41]. It suggests use of employment forecasts, more demographically derived labour supply techniques and analysis of past take-up. This guidance was not updated when the NPPF was revised in December 2024, and it is fundamentally unchanged from that which was in place when the current Local Plan and its informing evidence base – introduced in section 2 – were produced.

5.2 In undertaking the assessment, it is recognised that different approaches naturally have individual strengths and disadvantages. Economic forecasts, for instance, take account of anticipated changes to the performance and composition of the local economy but require assumptions to translate estimates of job growth – themselves uncertain – into further estimates of gross floorspace and land requirements. A past take-up approach, in contrast, is directly based on actual delivery of employment land and development but is by its nature constrained by historic trends which themselves cannot account for future changes to the local economy nor investments beyond what has happened in the past. No single scenario should therefore be viewed as definitive, and a degree of interpretation will be necessary in taking this evidence forwards.

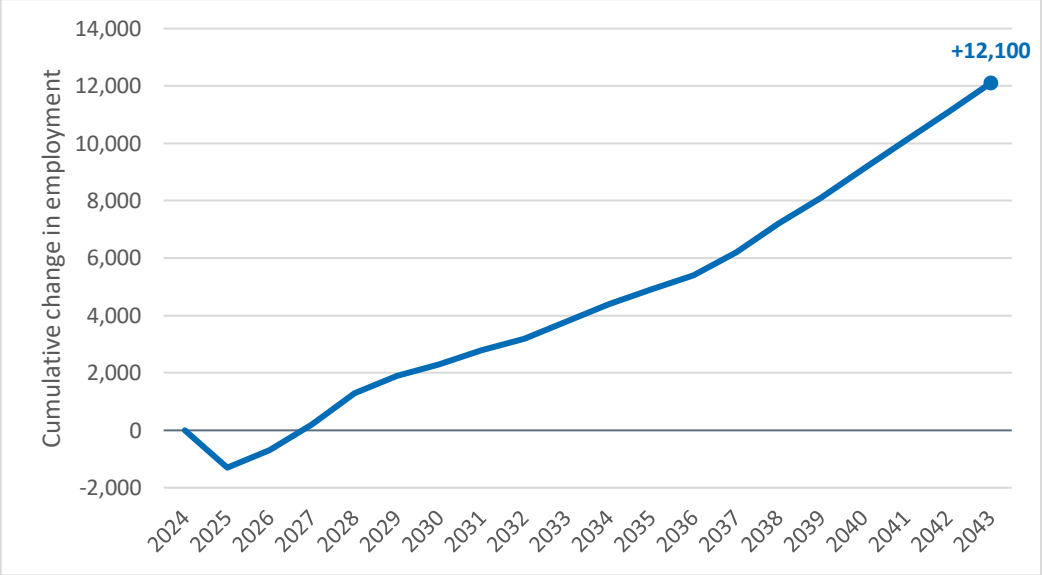
Introducing the Regional Econometric Model

5.3 Section 2 noted that authorities in the LCR have agreed, via a Statement of Common Ground signed in March 2020, to account for economic forecasts from the REM in developing their respective Local Plans. This indeed was previously the approach of the current Kirklees Local Plan, adopted in February 2019.

5.4 The REM is however regularly updated, with WYCA providing the latest version to inform this study in late 2024. It currently forecasts the creation of circa 12,100 jobs in Kirklees, in total, over the new plan period (2024-43). This assumes an initial decline, to 2026, before growth resumes and indeed then accelerates beyond 2036.

[41] PPG Reference ID 2a-027-20190220

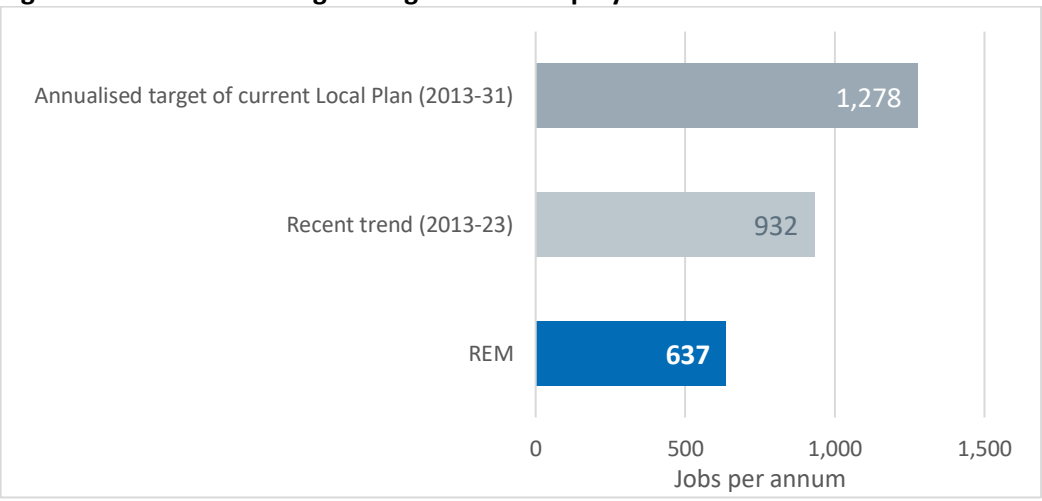
Figure 5.1: Cumulative Change in Employment Forecast by REM (2024-43)



Source: REM

5.5 The forecast would see an average of around 637 jobs created annually in Kirklees, which is not only around half the number targeted by the current Local Plan (1,278pa) but is also nearly a third short of the historic trend over the last reported decade (932pa; 2013-23).

Figure 5.2: Benchmarking Average Annual Employment Growth

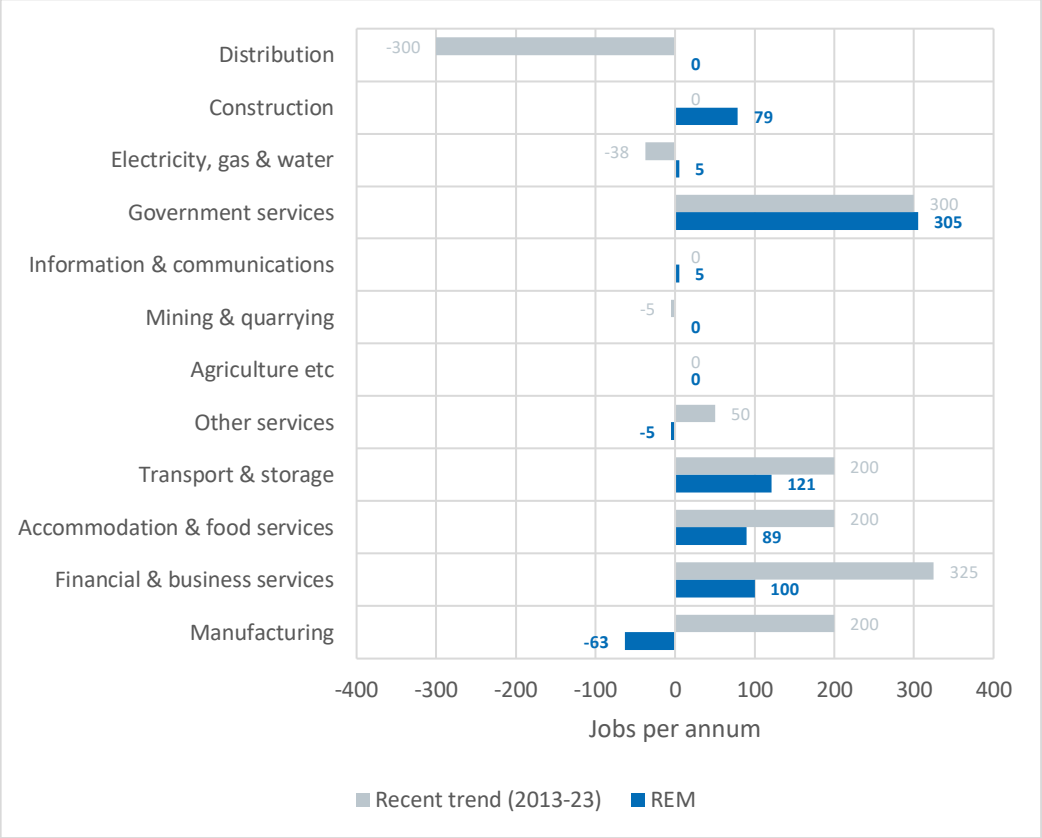


Source: BRES; REM; Turley analysis

5.6 Realisation of this forecast would though improve the historic trend for some individual sectors, most notably distribution – capturing wholesale and retail – which has typically lost 300 jobs per annum over the last decade but is forecast to stabilise under the REM. The construction sector is forecast to create around 79 jobs per annum, having been generally stable over the last decade, with modest growth also expected in the electricity, gas and water sector that has recently lost jobs. More modest improvements are forecast in three other sectors, namely Government services, information and communication and mining and quarrying. Other sectors are

contrastingly not forecast to sustain their recent growth, with the greatest divergence in manufacturing which is forecast to lose around 63 jobs per annum despite having created 200 jobs annually on average over the last decade. The recent rate of job growth in the financial and business services sector is also forecast to slow by over two thirds, while more than halving in the accommodation and food services sector and also slowing in transport and storage.

Figure 5.3: Comparing Historic Trend to REM Forecast by Sector



Source: REM; BRES; Turley analysis

Comparing to other baseline forecasts

5.7 While the REM has long been used in Kirklees and the wider LCR, it is important to appreciate that any such forecast has inherent limitations, requiring careful and critical consideration.

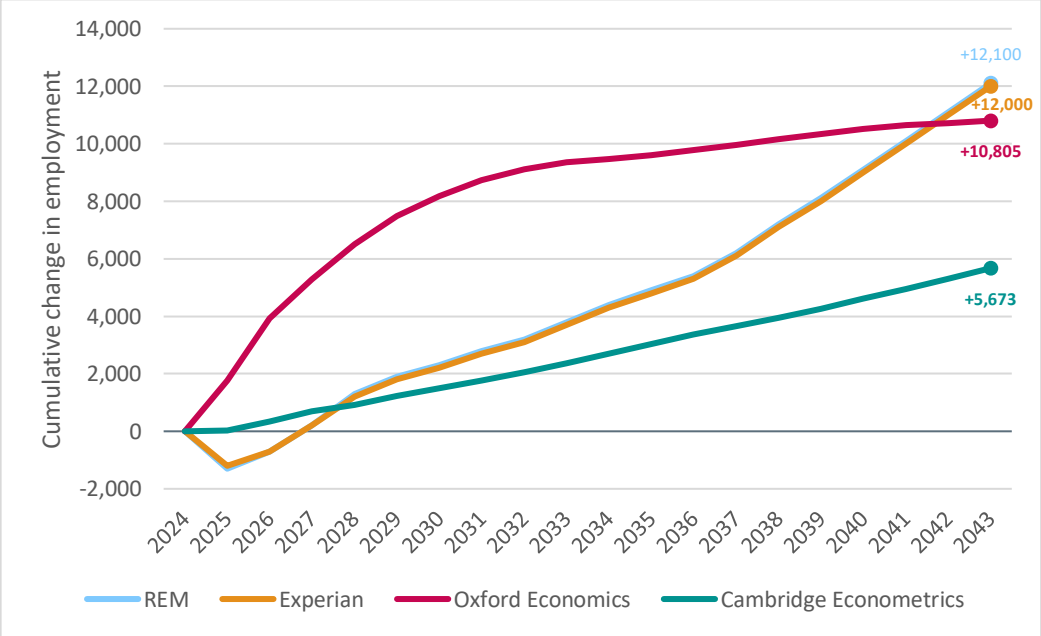
5.8 Forecasters themselves acknowledge that their "top-down" methodologies often do not fully recognise defining features of individual economies, including local specialisms and associated growth opportunities. Employment growth in specific sectors can also be significantly influenced by the forecasters' views on the national economy in particular.

5.9 While the REM is managed regionally, for the LCR, it is understood to remain based on a national and indeed global economic model developed by Experian. It is therefore still considered wise to undertake '*sense checks*' given that comprehensive studies

elsewhere have shown that even '*state-of-the-art techniques*' can result in projections of employment growth that fall '*below the actual outturn by a significant margin*'[42].

5.10 One such check can compare the job growth envisaged by the REM with the views of other forecasters, namely Cambridge Econometrics (CE) and Oxford Economics (OE) as well as to the standard quarterly forecast produced by Experian[43]. Comparing the REM to the latter does indicate that minimal adjustments have been made, at least for this baseline scenario, and it also shows that both the REM and the Experian forecast envisage more jobs being created in Kirklees over the new plan period than is anticipated either by CE or OE. The latter does forecast only slightly fewer – around 10,805 in total – and is notably more optimistic than the REM over the short-term, before gradually becoming less so. CE envisages a steadier rate of growth, but forecasts the creation of less than half as many jobs as the REM.

Figure 5.4: Comparing REM to Comparable Baseline Forecasts



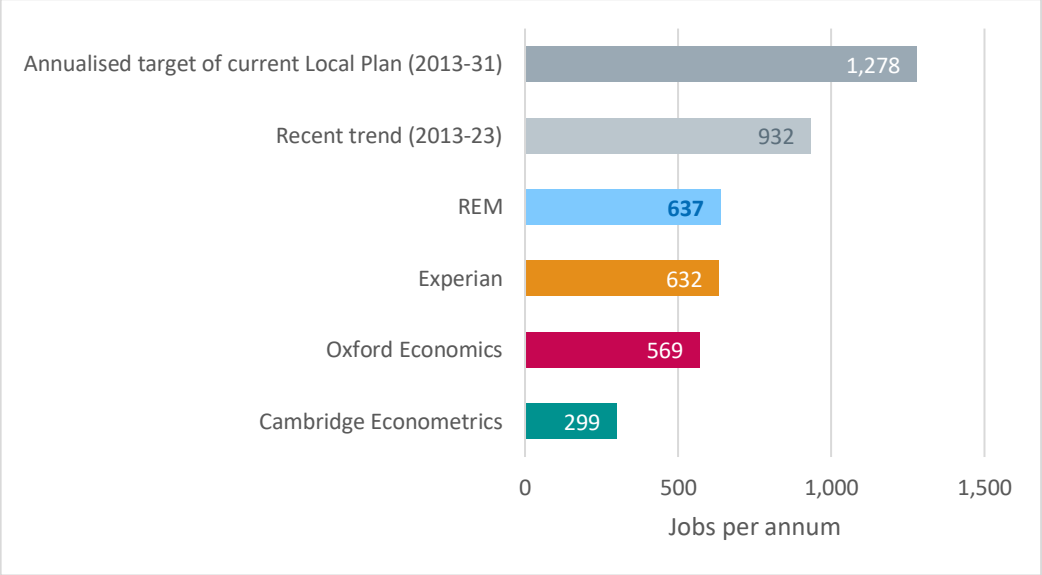
Source: REM; Experian; OE; CE; Turley analysis

5.11 This means that – in common with the REM – none of these alternative baseline forecasts would sustain the rate of job growth seen historically in Kirklees, nor come any closer to the target set by the current Local Plan.

[42] Cambridgeshire and Peterborough Independent Economic Review, final report (September 2018)

[43] Experian's June 2024 quarterly forecast was the latest available when this analysis was undertaken. Forecasts purchased from Cambridge Econometrics and Oxford Economics were respectively produced in April and July 2024

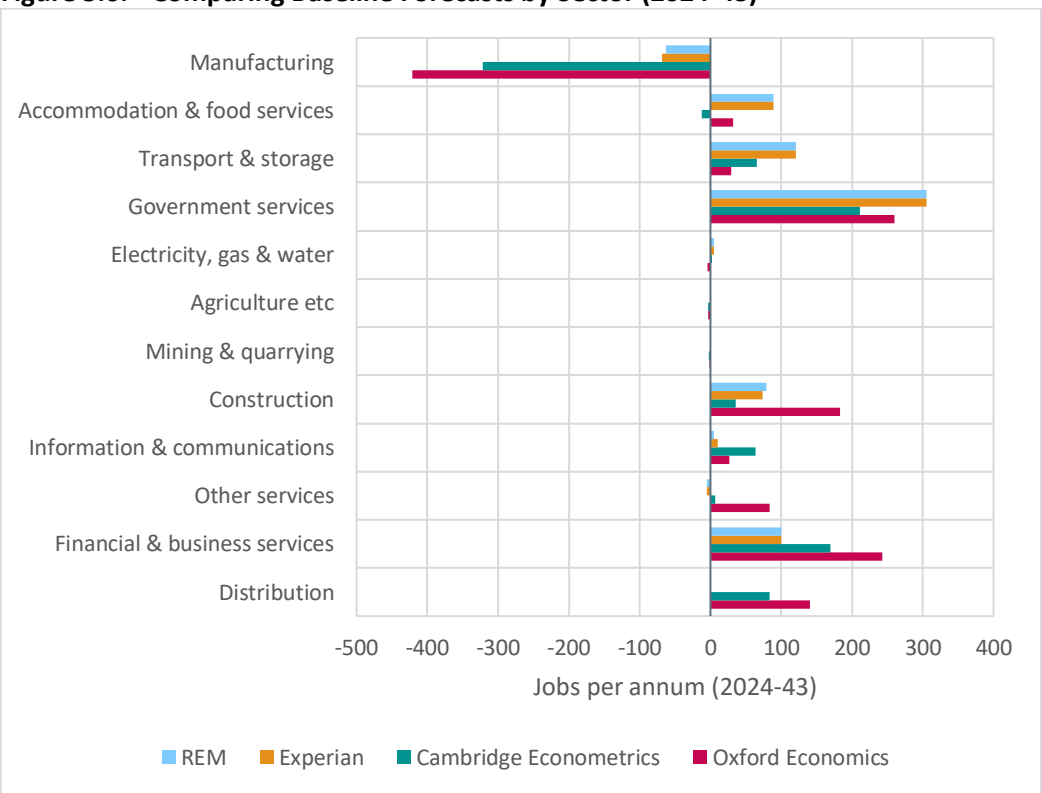
Figure 5.5: Benchmarking Average Annual Employment Growth



Source: REM; Experian; OE; CE; Turley analysis

5.12 The alternative forecasts do though have differing views on the outlook for individual sectors. Both CE and OE envisage the loss of far more manufacturing jobs than the REM, or indeed the standard Experian forecast. They anticipate the creation of fewer jobs in accommodation and food services; transport and storage; and Government services, albeit the latter does remain the main driver of growth in every scenario. CE and OE are contrastingly more optimistic on distribution; financial and business services; other services; and information and communications.

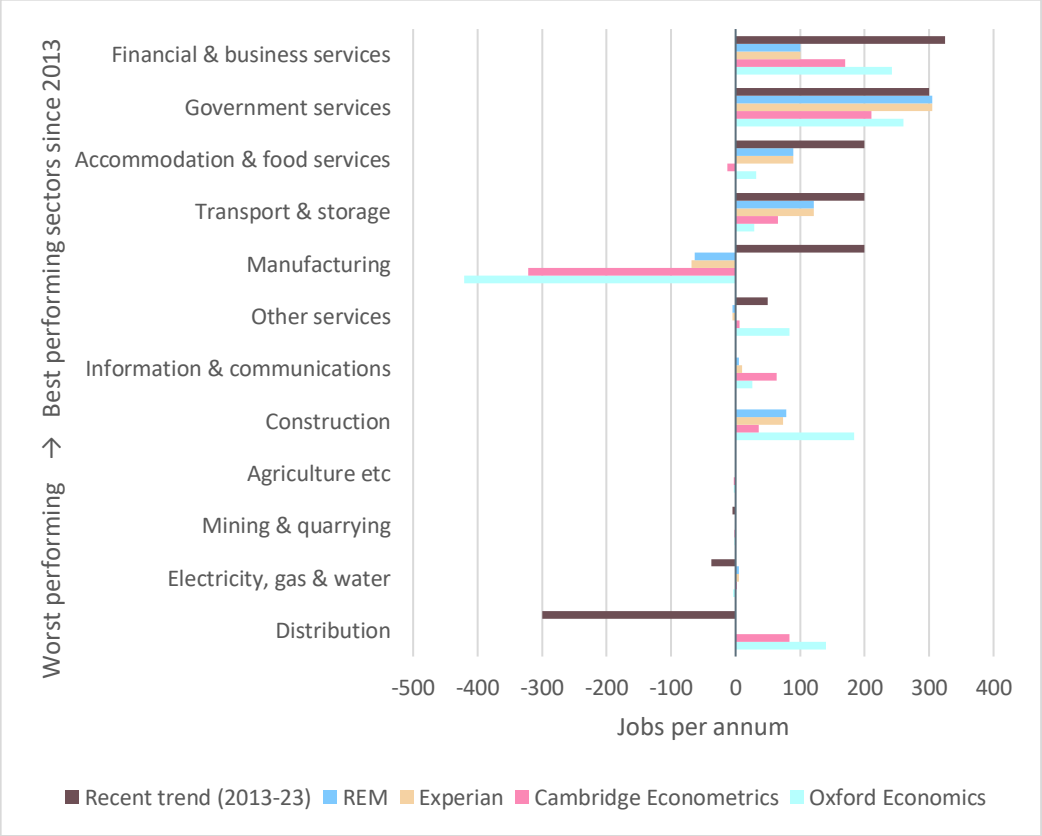
Figure 5.6: Comparing Baseline Forecasts by Sector (2024-43)



Source: REM; Experian; OE; CE; Turley analysis

5.13 These differing views can be helpfully set, once again, in the context of recent trends in Kirklees. This reveals for instance that none of the forecasts expect the financial and business services sector to keep creating jobs at the rate seen recently, with this also being true of the accommodation and food services; transport and storage; and manufacturing sectors. They also do not expect further job losses in distribution, of the kind seen over the last decade.

Figure 5.7: Comparing Sectoral Outlooks to Recent Trend



Source: REM; Experian; OE; CE; Turley analysis

5.14 The above provides a further means of checking the validity of the REM as a baseline, in the context both of past trends and alternative forecasts. It suggests that there could be grounds to:

- **Allow for more job creation** in those sectors that have recently driven growth, so that this can be more effectively sustained. With the REM already broadly continuing the recent trend in Government services, such an approach could be reasonably taken for financial and business services; accommodation and food services; transport and storage; and manufacturing. Improving the outlook for the latter especially would also help to align with the KIES, since three of the four

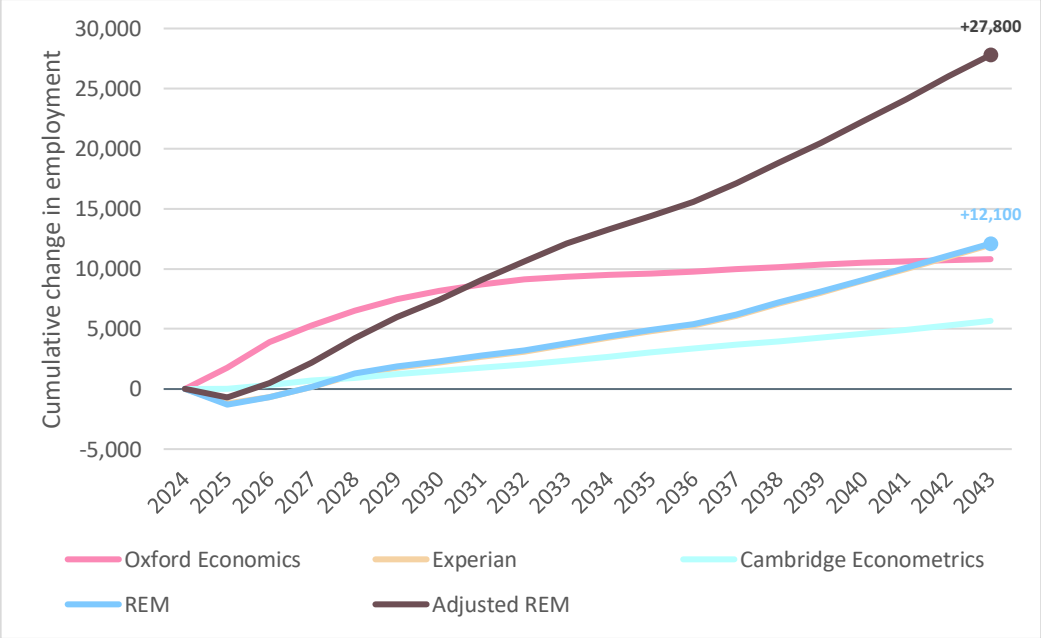
sectors specified in its vision[44] – plus part of the other[45] – sit within the manufacturing sector.

- **Remain aligned to the REM** in two of the sectors where OE and CE are more optimistic, specifically construction and information and communications, because neither are reported to have created jobs over the last decade and this optimism may therefore be misplaced.

- **Likewise align with the REM's forecast for the distribution sector**, where this broadly balances the negative recent trend with the optimism of the other forecasts.

5.15 In light of these conclusions, WYCA have developed a variant of the latest REM to allow for a continuation of the job growth recently seen in the four noted sectors, over the period to 2043[46]. Figure 5.8 shows that this would have a substantial impact, bringing over twice as many jobs – some 27,800 in total or 1,463 per annum – when compared to the unadjusted REM.

Figure 5.8: Introducing the Adjusted REM Forecast



Source: WYCA; REM; Experian; OE; CE; Turley analysis

[44] Advanced manufacturing; precision engineering; and textiles

[45] The "life sciences" part of the health and life sciences sector, referenced in the vision of the KIES, overlaps with the broader manufacturing sector according to the definition used by the Government's Office for Life Sciences. Health, as the other part of this priority sector, sits within the "Government services" sector which the REM already expects to broadly keep creating jobs at the recent rate

[46] Financial and business services; accommodation and food services; transport and storage; and manufacturing

Considering labour supply

5.16 In addition to employment forecasts, the PPG also recommends developing '*demographically derived assessments of current and future local labour supply*'[47].

5.17 With the Council in the early stages of developing a new Local Plan, there is a clear logic to basing such a scenario on the minimum need for housing that it will be aiming to meet[48]. This is derived through a standard method that the Government updated in December 2024[49].

5.18 While its outcome is subject to change, the standard method currently suggests that a minimum of 1,873 dwellings per annum will be needed in Kirklees[50].

5.19 Demographic modelling – introduced in the accompanying Strategic Housing Market Assessment (SHMA) – shows how such a level of housing provision over the period from 2024 to 2043, in combination with behavioural changes, could grow the labour force and support job creation[51].

5.20 It suggests that **between 1,002 and 1,707 jobs** could be supported annually, depending on the rate at which individuals of different ages are assumed to form households and the extent to which any recent worsening is assumed to improve[52].

5.21 Even the lower of these estimates would represent more jobs than envisaged either by the unadjusted REM or any of the other baseline forecasts. The upper estimates would also surpass the job growth envisaged by the *adjusted* REM (c.1,463pa) albeit with this seemingly dependent on the rate at which different groups form households, which is clearly uncertain as is the behaviour of the labour force with the modelling believed to have made relatively cautious assumptions on economic participation especially.

5.22 This suggests that there is merit to a labour supply scenario which cautiously estimates how provision in line with the standard method could lead to a level of job growth within the range suggested by the other scenarios considered to this point. This does though require assumptions to be made around the distribution of jobs by sector, which have been derived from the adjusted REM for illustration.

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[47] PPG Reference ID 2a-027-20190220

[48] MHCLG (December 2024) National Planning Policy Framework, paragraph 61

[49] *Ibid*, paragraph 62

[50] This has risen since the standard method was revised in December 2024, with a need for 1,840 dwellings per annum implied at that point

[51] This report applies the economic activity, unemployment and commuting assumptions made in the SHMA but also allows for people holding more than one job ('double jobbing') based on the long-term trend recorded in Kirklees by the Annual Population Survey. The SHMA makes clear that it does not make such adjustment, which is necessary to convert its '*employment outputs to a job growth projection*'.

[52] The SHMA applies household formation rates derived both from the latest 2022-based household projections – released in October 2025 – and from the earlier 2014-based projections that have continued to be widely used, having been retained in the former standard method. Variants are presented for each to allow for a gradual return to higher rates of household formation amongst younger groups that have become less likely to form them, as affordability has worsened

Understanding associated land requirements

5.23 The PPG continues to describe four key relationships that must be considered when translating employment forecasts into land requirements, as follows[53]:

- **Standard Industrial Classifications (SIC) sectors to use classes.** This requires assignment of jobs to land use categories, isolating those requiring conventional employment land which accommodates offices, industrial space and warehouses;
- **SIC sectors to types of property.** This estimates the proportion of jobs that are likely to require each type of property;
- **Employment to floorspace, based on employment density**. This uses published evidence to first estimate, and then aggregate, the amount of floorspace needed to accommodate each additional employee; and
- **Floorspace to site area, using a plot ratio**. This final step considers the amount of land that may be required to accommodate new floorspace.

5.24 These relationships are considered in turn below to establish the floorspace and land that may be required to accommodate the job growth envisaged in the various scenarios introduced in this section.

Sectors to use classes

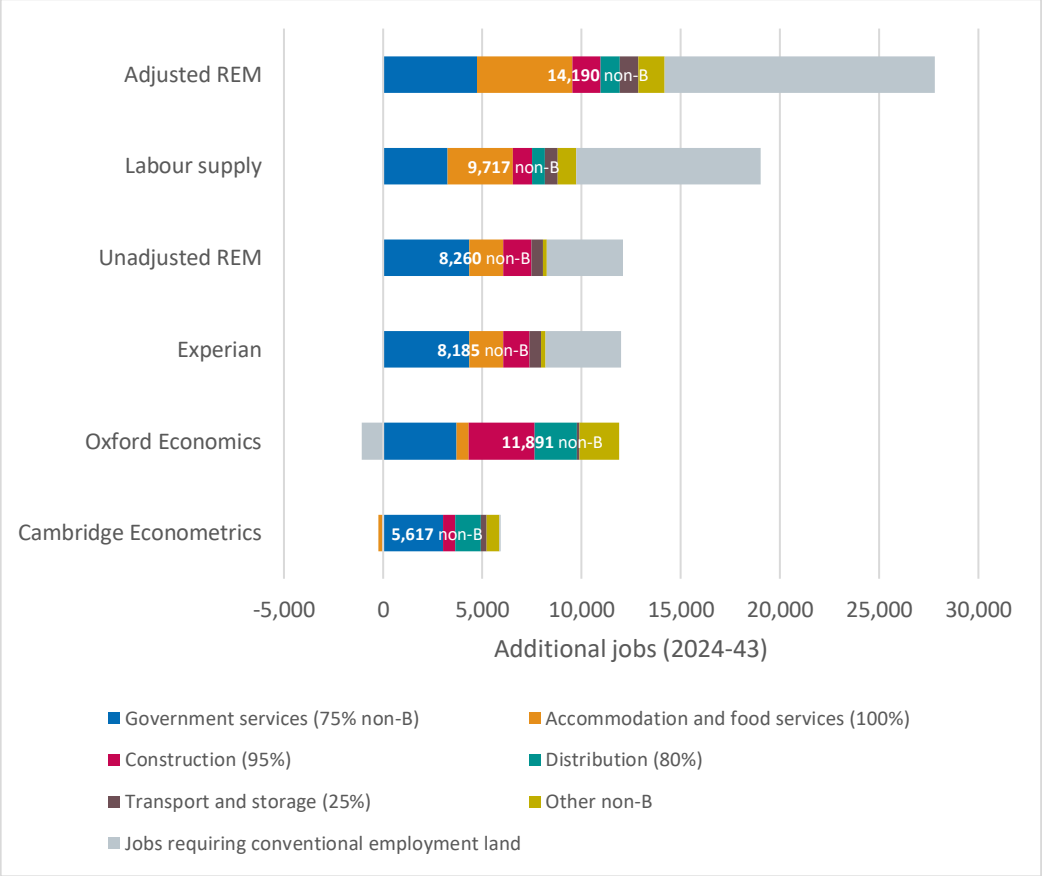
5.25 While this report has considered employment growth across all sectors, it is widely recognised that only certain sectors generate a need for conventional employment land, as distinct from other premises such as shops, schools and hotels. It is therefore necessary to isolate jobs in sectors that are unlikely to require offices, industrial premises and warehouses, so that they can be excluded from this assessment.

5.26 **Appendix 2** details the assumptions that have been indicatively made at this stage, based on best practice and experience of similar studies.

5.27 Applying these assumptions to the various scenarios suggests that at least 57% of new jobs may not require the kind of employment land considered in this report. This is driven in most cases by Government services, only a quarter of which are assumed to require offices with the remainder assumed to be in settings like schools and health centres. Accommodation and food services is the main driver in the labour supply scenario, as in the adjusted REM from which it is derived, with all such jobs assumed to be based in hotels, cafes and restaurants for example.

[53] PPG Reference ID 2a-030-20190220

Figure 5.9: Additional Jobs Assumed Not to Require Employment Land (2024-43)



Source: Turley analysis

5.28 It is assumed, as shown above, that as many as 14,190 new jobs in Kirklees will be created but not accommodated on traditional employment land. With this implying an additional need that is necessarily excluded from the remainder of this assessment, the Council is advised to consider how such growth can be accommodated, via existing or new strategies.

Sectors to property types

5.29 Building upon the above, it is necessary to consider the type of properties that may be required to accommodate jobs created in each sector. The assumptions made in this regard are set out in **Appendix 2** and are again based on best practice.

5.30 When aggregating the outcomes for individual sectors, there is implied to be a particular need for offices which are assumed to accommodate as many as 7,945 jobs. Fewer jobs are assumed to require warehouses and most scenarios envisage a reduction in the number of jobs requiring industrial space. The labour supply scenario and the adjusted REM, on which it is based, are the only scenarios that anticipate growth in the number of jobs requiring industrial premises.

Table 5.1: Jobs Requiring Space on Conventional Employment Land (2024-43)

Job	Office	Industrial	Warehouse	**Total**	Other
Adjusted REM	7,945	2,250	3,415	**13,610**	14,190
Labour supply	5,440	1,541	2,338	**9,319**	9,717
Unadjusted REM	3,240	-1,080	1,680	**3,840**	8,260
Experian	3,320	-1,170	1,665	**3,815**	8,185
Cambridge Econometrics	4,882	-5,504	678	**56**	5,617
Oxford Economics	5,790	-7,197	321	**-1,086**	11,891

Source: Turley analysis *Note: figures may not sum due to rounding*

Employment to floorspace

5.31 The next stage considers the amount of floorspace needed to accommodate each additional employee.

5.32 Section 2 explains that the existing Local Plan converted its own job target to an employment land requirement using assumptions that were derived from a study completed for Yorkshire and the Humber by RTP in 2010[54]. This was favoured over equivalent national research that was completed by the former Homes and Communities Agency[55] (HCA) in 2015, to the satisfaction of the examining Inspector whose report of January 2019 described this approach as '*reasonable*' where the '*more recent figures*' were '*nationally based*'[56].

5.33 Six further years have passed since this conclusion was reached, meaning that it has now been 15 years since the regional evidence was produced. While even the HCA analysis is now ten years old – remaining the most recent such study of its kind – this is at least known to have reflected the '*latest industry 'norms' of how space is planned, developed and utilised*' up to 2015, particularly considering the implications of technological improvements, the evolution of new forms of workspace and sectoral activity[57]. It also acknowledged what was viewed as '*a significant rise*' in homeworking, driven by '*growth in self-employment, improved broadband connectivity, property prices, commuting distances and efficiency and cost savings*'[58]. It naturally does not capture subsequent evolution, accelerated in places by the pandemic, but it is still considered a more reliable basis for this assessment in the ongoing absence of similarly comprehensive research at both the regional and national level.

5.34 In order to convert the job growth summarised at Table 5.1 into floorspace, the various employment densities that the former HCA produced for different types of offices,

[54] Roger Tym and Partners (2010) Planning for Employment Land, Translating Jobs into Land

[55] Homes and Communities Agency (2015) Employment Density Guide, third edition

[56] Planning Inspectorate (January 2019) Report on the Examination of the Kirklees Publication Draft Local Plan, paragraph 90

[57] Homes and Communities Agency (2015) Employment Density Guide, third edition, paragraphs 1.3 and 1.5

[58] *Ibid*, paragraphs 3.36-3.38

industrial premises and warehouses have been respectively aggregated and averaged as follows:

- **Office** – general office (corporate; professional services; public sector; technology; media and telecoms; finance and insurance) and call centres;
- **Industrial** – light industrial, industrial and manufacturing; and
- **Warehouse** – regional distribution and "final mile" distribution centre.

5.35 The published densities notably measure floorspace in different ways, so they have all been converted to consistently measure the gross external area (GEA) which is considered the most appropriate basis for calculating employment land requirements[59]. The regional figures that have previous been used in Kirklees are also presented for context, after also being converted in the same way.

Table 5.2: Employment Densities (sqm GEA per full-time equivalent employee)

Area	Office	Industrial	Warehouse
HCA	**13.3sqm**	**44.8sqm**	**73.5sqm**
RTP	19.3sqm	70.4sqm	70.4sqm

Source: HCA; Turley analysis *Note: figures may not sum due to rounding*

5.36 It is important to note that employment densities are applied on the basis of full-time equivalent (FTE) jobs, rather than *total* jobs which have been the focus to this point. While the baseline Experian forecast and both versions of the REM also report on FTE jobs, providing a basis also for the labour supply scenario that is based on the latter, it has been necessary to convert both the OE and CE forecasts which do not report FTEs. This has been based on the unadjusted REM, taking an average of the implied ratios between workforce and FTE jobs in each sector in 2024 and 2043 to account for forecast change.

5.37 Applying employment densities to these estimates of future change in FTE employment, at Table 5.3, provides an indication of the amount of additional employment floorspace that could be required to support future job growth in Kirklees. It suggests that there would be a requirement for additional offices and warehouses in every scenario, albeit varying in scale. All but the adjusted REM and the labour supply scenario imply a negative requirement for industrial space, of a scale that also makes the combined need for all types of employment space negative in three scenarios and only marginally positive in another.

[59] For offices, a 15% uplift has first been applied to convert net internal area (NIA) to gross internal area (GIA) with a further 5% uplift applied to convert GIA to GEA. For industrial premises, a 5% uplift is applied to convert NIA to GIA, with a further 5% uplift then converting GIA to GEA. No conversion is necessary for warehouses given that the published employment density is based on GEA

Table 5.3: Implied Need for Employment Space (GEA; 2024-43)

Need	FTE Jobs/Floorspace	Office	Industrial	Warehouse	**Total**
Adjusted REM	FTE jobs	5,700	810	1,350	**7,860**
	Floorspace (sqm)	75,710	36,295	99,225	**211,230**
Labour supply	FTE jobs	4,521	643	1,071	**6,235**
	Floorspace (sqm)	60,054	28,790	78,706	**167,550**
Unadjusted REM	FTE jobs	2,715	-1,260	280	**1,735**
	Floorspace (sqm)	36,062	-56,459	20,580	**183**
Experian	FTE jobs	2,345	-1,710	90	**725**
	Floorspace (sqm)	31,147	-76,623	6,615	**-38,861**
Cambridge Econometrics	FTE jobs	3,801	-5,044	464	**-779**
	Floorspace (sqm)	50,482	-226,023	34,138	**-141,403**
Oxford Economics	FTE jobs	4,456	-6,596	107	**-2,033**
	Floorspace (sqm)	59,190	-295,567	7,899	**-228,478**

Source: HCA; Turley analysis *Note: figures may not sum due to rounding*

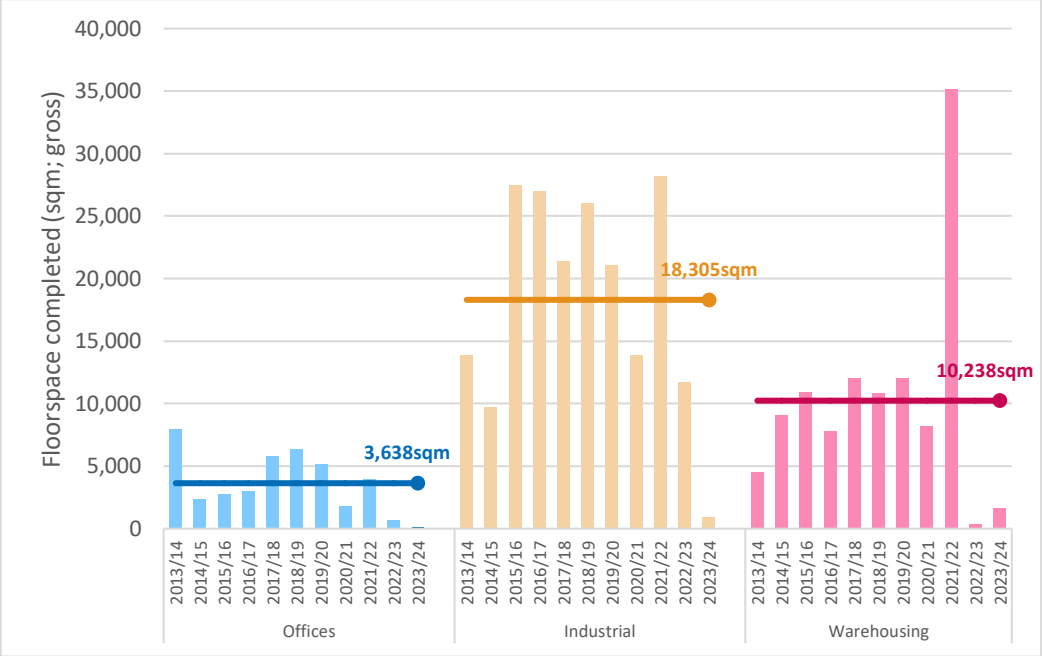
Considering past take-up

5.38 The PPG suggests that '*analysis based on the past take-up of employment land and property*' can also provide an indication of future needs[60]. This is measured by floorspace and separates completions from losses, making this an appropriate point to consider the former where the latter are considered for all scenarios later in this section.

5.39 The Council's monitoring indicates that circa 32,180sqm of employment space has been completed on average each year during the current plan period to date (2013-24). Over half of this space (57%) has been industrial in nature, with Figure 5.10 showing that such premises were developed at a reasonably steady rate between 2015 and 2022 before slowing. Nearly a third (32%) has been warehousing, which was again developed at a relatively steady rate until 2021 before spiking in the subsequent year (2021/22) and then reducing to a very low level. A smaller amount of office space has been developed, peaking in the first year of the current plan period (2013/14) and also being relatively high over the three years prior to the pandemic, with much less office space appearing to have been developed in three of the four years reported since. While the Council previously believed that take-up over the period to 2015 had been suppressed by a lack of sites – as noted in section 2 – the rate of development can be seen to have subsequently risen across all types of premises, such that this is less likely to have been an issue in all but the most recent years.

[60] PPG Reference ID 2a-027-20190220

Figure 5.10: Completed Employment Space in Kirklees (2013-24)



Source: Council monitoring; Turley analysis

5.40 A continuation of the trends seen between 2013 and 2024 would see some 611,418sqm of employment space developed throughout Kirklees over the new plan period (2024-43). This is nearly three times more than suggested even by the highest of the scenarios developed in this section. This can be largely attributed to industrial space, nearly ten times more of which could be needed if past take-up continues than in even the adjusted REM scenario. Nearly twice as much warehousing space is also implied to be needed in such a scenario.

Table 5.4: Extrapolation of Past Take-up vs. Other Scenarios (sqm; 2024-43)

Past take up / Scenarios	Office	Industrial	Warehouse	**Total**
Past take-up	**69,113**	**347,786**	**194,519**	**611,418**
Adjusted REM	75,710	36,295	99,225	211,230
Labour supply	60,054	28,790	78,706	167,550
Unadjusted REM	36,062	-56,459	20,580	183
Experian	31,147	-76,623	6,615	-38,861
Cambridge Econometrics	50,482	-226,023	34,138	-141,403
Oxford Economics	59,190	-295,567	7,899	-228,478

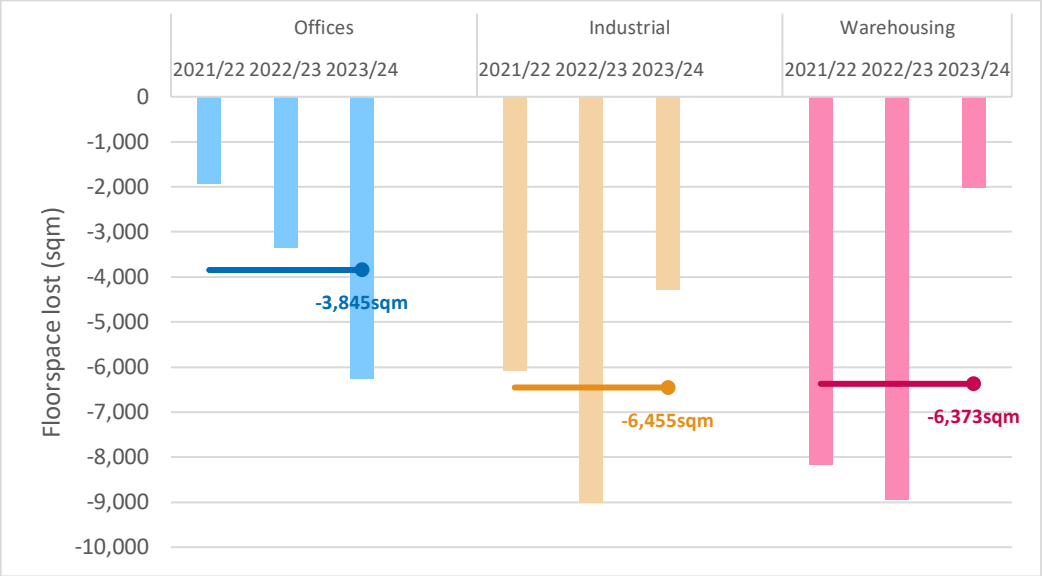
Source: Turley analysis *Note: figures may not sum due to rounding*

Allowing for losses

5.41 The Council also records how existing employment space has been lost to other uses, albeit only over the last three years (2021-24). Circa 16,673sqm is reported to have been lost annually in this time, most often being industrial or warehousing space, albeit

it can be noted that less of both has been lost in the last reported year (2023/24). Roughly 40% less office space has been lost on average, but the amount has increased over the three-year period for which data is available.

Figure 5.11: Employment Space Lost to Other Uses in Kirklees (2021-24)



Source: Council monitoring; Turley analysis

5.42 Some 316,787sqm of employment space could be lost over the new plan period if the recent trend continues, equivalent to around 9% of the existing stock outlined at the earlier Table 4.1. There is though no guarantee that space will continue to be lost at this rate, as it could be the case that much of the district's obsolete and redundant stock has been redeveloped over recent years leaving less such space to be lost in future.

5.43 It is ultimately for the Council to judge how much space is likely to be lost over the plan period, potentially with the benefit of further years' data, and to decide how much of it needs to be replaced. This can be achieved by adding to the floorspace requirements calculated to this point, with Table 5.5 providing an indication of how the replacement either of all losses or half of them ('some losses') would affect the previously reported figures.

Table 5.5: Impact of Replacing All Losses or Half (sqm; 2024-43)

Impact	Office	Industrial	Warehouse	Total
Replacing all losses	**+73,061**	**+122,639**	**+121,087**	**+316,787**
Past take-up	142,175	470,425	315,606	928,205
Adjusted REM	148,772	158,934	220,312	528,017
Labour supply	133,116	151,428	199,793	484,337
Unadjusted REM	109,123	66,180	141,667	316,970
Experian	104,209	46,016	127,702	277,927
Cambridge Econometrics	123,543	-103,384	155,225	175,384
Oxford Economics	132,251	-172,928	128,986	88,309
Replacing some losses	**+36,531**	**+61,319**	**+60,544**	**+158,394**
Past take-up	105,644	409,106	255,062	769,812
Adjusted REM	112,241	97,614	159,769	369,624
Labour supply	96,585	90,109	139,250	325,944
Unadjusted REM	72,593	4,860	81,124	158,576
Experian	67,678	-15,304	67,159	119,533
Cambridge Econometrics	87,012	-164,703	94,682	16,991
Oxford Economics	95,720	-234,248	68,443	-70,085

Source: Turley analysis *Note: figures may not sum due to rounding*

Allowing for choice and flexibility

5.44 In order to plan positively for future employment growth, it is widely considered best practice to add a margin of choice and flexibility. This additional space provides businesses and developers with a reasonable choice of sites, and allows for delays in them coming forward. Without such a buffer, any delay of this nature risks constraining job growth due to a shortage of available space.

5.45 Establishing such a margin is not an exact science and instead requires a degree of judgement. Having reflected on best practice, it is considered reasonable to apply an allowance equivalent to five years' supply, based on the average rate of development during the current plan period to date. This adds a buffer of circa 160,900sqm to each of the previously calculated estimates, as shown at Table 5.6 overleaf.

Table 5.6: Allowing for Choice and Flexibility (sqm; 2024-43)

Choices	Office	Industrial	Warehouse	Total
Buffer equal to 5 years' take-up	**+18,188**	**+91,523**	**+51,189**	**+160,900**
Past take-up and all losses	160,362	561,948	366,795	1,089,105
Past take-up and some losses	123,832	500,628	306,251	930,711
Adjusted REM and all losses	166,959	250,456	271,501	688,917
Labour supply and all losses	151,303	242,951	250,982	645,237
Adjusted REM and some losses	130,429	189,137	210,958	530,523
Labour supply and some losses	114,773	181,632	190,439	486,843
Unadjusted REM and all losses	127,311	157,702	192,856	477,870
Experian and all losses	122,397	137,538	178,891	438,826
CE and all losses	141,731	-11,861	206,414	336,284
Unadjusted REM and some losses	90,780	96,383	132,313	319,476
Experian and some losses	85,866	76,219	118,348	280,433
OE and all losses	150,439	-81,406	180,175	249,208
CE and some losses	105,200	-73,181	145,871	177,890
OE and some losses	113,908	-142,725	119,632	90,815

Source: Turley analysis *Note: figures may not sum due to rounding*

Floorspace to site area

5.46 The amount of land that could be required to accommodate such quantities of floorspace can also be estimated. Unlike with employment densities, there remains no official guidance on the plot ratios that should be used in such calculations, with the default assumption typically that industrial premises and warehouses are single storey units occupying 40% of their plots. While it is often assumed that offices take a similar form, especially in business parks, it can also be reasonable to assume a more intensive use of the plots that are available for such uses, given that some office schemes can be expected in higher density urban areas. In the absence of official guidance, a ratio of 150% is considered a reasonable assumption in this context, generally allowing for configuration over multiple storeys with a two-storey office filling three quarters of its plot or a three-storey office occupying half of its plot for example. The Council should though be aware that a greater quantum of land would be needed to accommodate new floorspace where lower density development prevails, and indeed this is considered as a sensitivity later in this section.

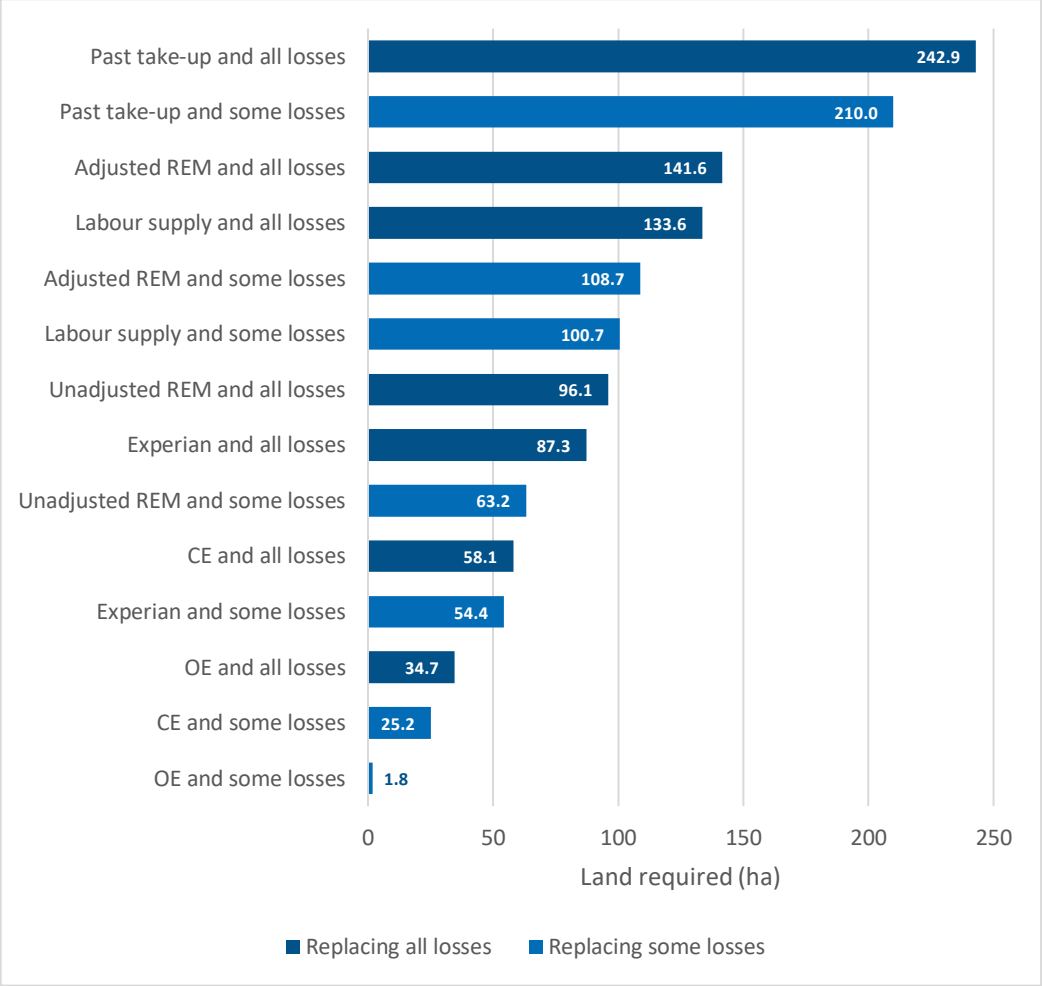
Table 5.7: Implied Need for Employment Land (hectares; 2024-43)

Need	Office	Industrial	Warehouse	**Total**
Past take-up and all losses	10.7	140.5	91.7	**242.9**
Past take-up and some losses	8.3	125.2	76.6	**210.0**
Adjusted REM and all losses	11.1	62.6	67.9	**141.6**
Labour supply and all losses	10.1	60.7	62.7	**133.6**
Adjusted REM and some losses	8.7	47.3	52.7	**108.7**
Labour supply and some losses	7.7	45.4	47.6	**100.7**
Unadjusted REM and all losses	8.5	39.4	48.2	**96.1**
Experian and all losses	8.2	34.4	44.7	**87.3**
Unadjusted REM and some losses	6.1	24.1	33.1	**63.2**
CE and all losses	9.4	-3.0	51.6	**58.1**
Experian and some losses	5.7	19.1	29.6	**54.4**
OE and all losses	10.0	-20.4	45.0	**34.7**
CE and some losses	7.0	-18.3	36.5	**25.2**
OE and some losses	7.6	-35.7	29.9	**1.8**

Source: Turley analysis *Note: figures may not sum due to rounding*

5.47 Figure 5.12 overleaf further illustrates how the overall need for employment land varies between the scenarios. It shows that a continuation of past take-up, with the replacement even of half of all losses, would generate the greatest need for employment land at over 210ha. The adjusted REM and labour supply scenarios are then reasonably closely aligned, at circa 137-142ha or 101-109ha if only half of all losses are replaced. These scenarios aside, no other suggests a need for more than 96ha of employment land, with the OE forecast notably suggesting that there is only a marginal need (c.2ha) even if half of all losses are replaced.

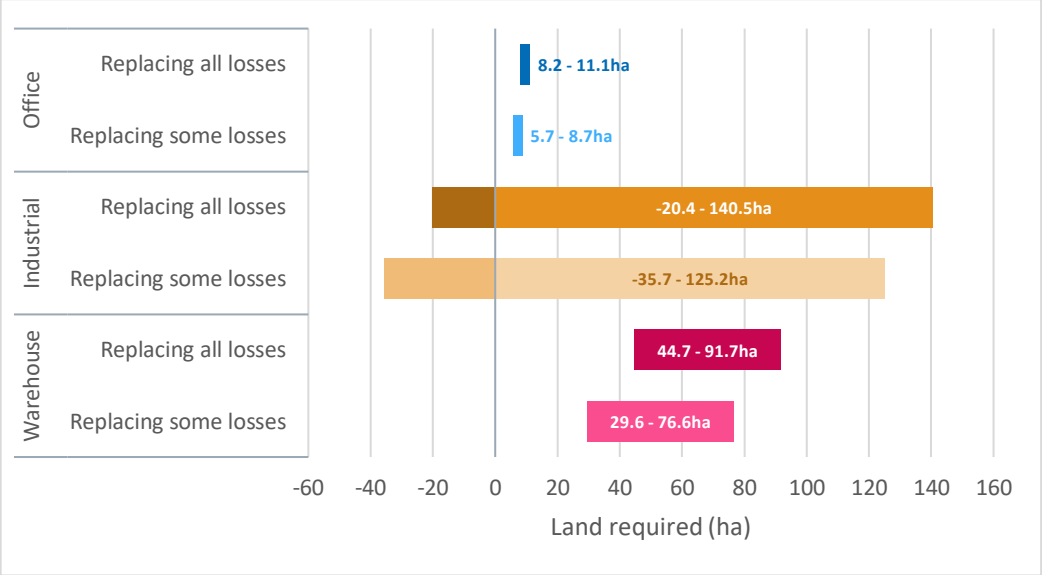
Figure 5.12: Total Employment Land Needed by Scenario (hectares; 2024-43)



Source: Turley analysis

5.48 Figure 5.13 overleaf breaks down the above to show the ranges implied for offices, industrial premises and warehouses. It confirms that there is a consistently positive requirement for both offices and particularly warehouses, with the range implied for the former also being relatively narrow. The range is much wider for industrial premises, with some scenarios – specifically those linked to forecasts from CE and OE – suggesting an oversupply and others, particularly those based on past take-up, indicating that up to 140.5ha of further land is needed.

Figure 5.13: Range of Employment Land Requirements by Property Type (2024-43)



Source: Turley analysis

Acknowledging uncertainties

5.49 Any assessment of the need for employment land can produce only broad estimates, which are sensitive to the underlying assumptions that are necessarily made.

5.50 This sensitivity is particularly illustrated when considering office land. As noted earlier, this assessment has specifically allowed for relatively high-density office development but it is still acknowledged that a range of office schemes could be conceivably developed in Kirklees, potentially including business parks that would have lower densities. This prospect naturally introduces uncertainty around the amount of land that might be needed to deliver a fixed amount of office space.

5.51 Given this uncertainty, it can be noted from Table 5.8 that assuming a lower plot ratio for offices (40%) – thereby aligning with the assumptions made for warehouses and industrial premises – would increase the amount of land needed to accommodate offices by a factor of 3.75. This would effectively widen the ranges presented for offices at Figure 5.13, suggesting that as much as 41.7ha of land suited to offices could be needed over the plan period and that up to 272.3ha of employment land could be needed in total.

Table 5.8: Impact of Lower Plot Ratio for Offices

Impact	Core assumptions			Assumed lower density		
	Industrial/ warehouse	Offices	Total need	Offices	**Total need**	Extra land needed
Past take-up and all losses	232.2	10.7	242.9	40.1	**272.3**	+29.4
Past take-up and some losses	201.7	8.3	210.0	31.0	**232.7**	+22.7
Adjusted REM and all losses	130.5	11.1	141.6	41.7	**172.2**	+30.6
Labour supply and all losses	120.0	9.6	129.5	35.9	**155.8**	+26.3
Adjusted REM and some losses	100.0	8.7	108.7	32.6	**132.6**	+23.9
Unadjusted REM and all losses	87.6	8.5	96.1	31.8	**119.5**	+23.3
Labour supply and some losses	89.5	7.1	96.6	26.7	**116.2**	+19.6
Experian and all losses	79.1	8.2	87.3	30.6	**109.7**	+22.4
CE and all losses	48.6	9.4	58.1	35.4	**84.1**	+26.0
Unadjusted REM and some losses	57.2	6.1	63.2	22.7	**79.9**	+16.6
Experian and some losses	48.6	5.7	54.4	21.5	**70.1**	+15.7
OE and all losses	24.7	10.0	34.7	37.6	**62.3**	+27.6
CE and some losses	18.2	7.0	25.2	26.3	**44.5**	+19.3
OE and some losses	-5.8	7.6	1.8	28.5	**22.7**	+20.9

Source: Turley analysis *Note: figures may not sum due to rounding*

Summary

5.52 This section has sought to quantify the demand for employment land and floorspace that could be generated in Kirklees over the emerging plan period, using the approaches suggested in the PPG and drawing upon the latest available evidence. It is important to recognise that each approach has strengths and limitations, and none should be viewed as definitive with a degree of interpretation necessary.

5.53 The use of employment forecasts is encouraged by the PPG, and the Council has agreed with neighbours in the LCR to account for the REM in developing their respective Local Plans. The latest iteration suggests that around 12,100 jobs will be created in Kirklees between 2024 and 2043, equivalent to circa 637 jobs per annum which is not only around half the number targeted by the current Local Plan (1,278pa) but is also nearly a third short of the historic trend over the last decade (932pa). Realisation of this forecast would though improve the historic trend for certain sectors, such as distribution and construction, albeit while bringing job losses in a manufacturing sector that has recently grown.

5.54 While the REM has long been used in Kirklees and the wider LCR, any such forecast has inherent limitations making it wise to undertake sense checks. This section has established that none of the other leading forecasting houses envisage more jobs being created in Kirklees, with Oxford Economics and Experian forecasting a comparable level of job growth (as would be expected of the latter, where its forecasts ultimately underpin the REM). The other forecasts do though have differing views on the outlook for individual sectors, envisaging the loss of more manufacturing jobs but the creation of more jobs in distribution; financial and business services; other services; and information and communication. Even in these scenarios there would though remain a marked slowing in the sectors that have recently created the most jobs in Kirklees, namely financial and business services; accommodation and food services; transport and storage; and manufacturing. If these sectors were to keep creating jobs at the recent rate, a specially created variant of the REM suggests that some 1,463 jobs could be created annually in Kirklees, totalling some 27,800 over the emerging plan period.

5.55 The PPG also requires labour supply to be taken into account, and this can be reasonably based on demographic modelling from the Strategic Housing Market Assessment (SHMA) which estimates how the population of Kirklees could change if the minimum housing need suggested by the standard method is met. This indicates that between 1,002 and 1,639 jobs could be supported annually, depending on future household formation rates, with this range notably framing the highest of the estimates introduced above and surpassing all others.

5.56 Having introduced a range of scenarios, this section has proceeded to estimate the land that could be needed to accommodate the number and profile of jobs forecast in each one, by assigning jobs to different types of premises and estimating the amount of space needed per job. As recommended by the PPG, outcomes have also been compared to a projection of the take-up recorded in Kirklees during the current plan period, as recorded by the Council. This produces an extremely broad range, with its unique profile of jobs suggesting that **as little as 1.8ha** of land could be needed to support the forecast from Oxford Economics if it is assumed that losses continue at the recent rate and are partially replaced. Conversely, if all are replaced and past take-up continues at the rate seen since 2013, then **some 242.9ha** of employment land could be needed, with even this a potentially conservative estimate where it assumes that offices are developed at relatively high densities. **Up to 272.3ha** could be needed if lower density office development prevails.

5.57 The ranges are generally narrower when focusing on particular types of employment land. Circa 5.7-11.1ha of land suited to offices is implied to be needed – rising up to 41.7ha if allowance was also made for lower density office schemes – and 29.6-91.7ha of warehousing land could also be needed. There is a much wider range for industrial land, with some scenarios implying an oversupply of up to 35.7ha and others suggesting that up to 140.5ha of additional land could be needed. This reflects uncertainty around whether jobs will be lost, as expected by some forecasting houses, or take-up instead continues at the relatively healthy rate seen in Kirklees.

6. Employment Land Supply

6.1 This section summarises a review of the current employment land supply in Kirklees which has been independently undertaken by Aspinall Verdi. It accounts for the evidence presented in the previous section with regards the future economic development needs arising from local economic forecast growth and the Council's policy objectives. It also includes consideration of the characteristics and quality of existing and undeveloped employment sites across the study area, based on a list of sites provided by the Council.

Overview of assessed sites

6.2 The analysis is informed by Aspinall Verdi's assessment of the 116 sites identified by the Council. These include:

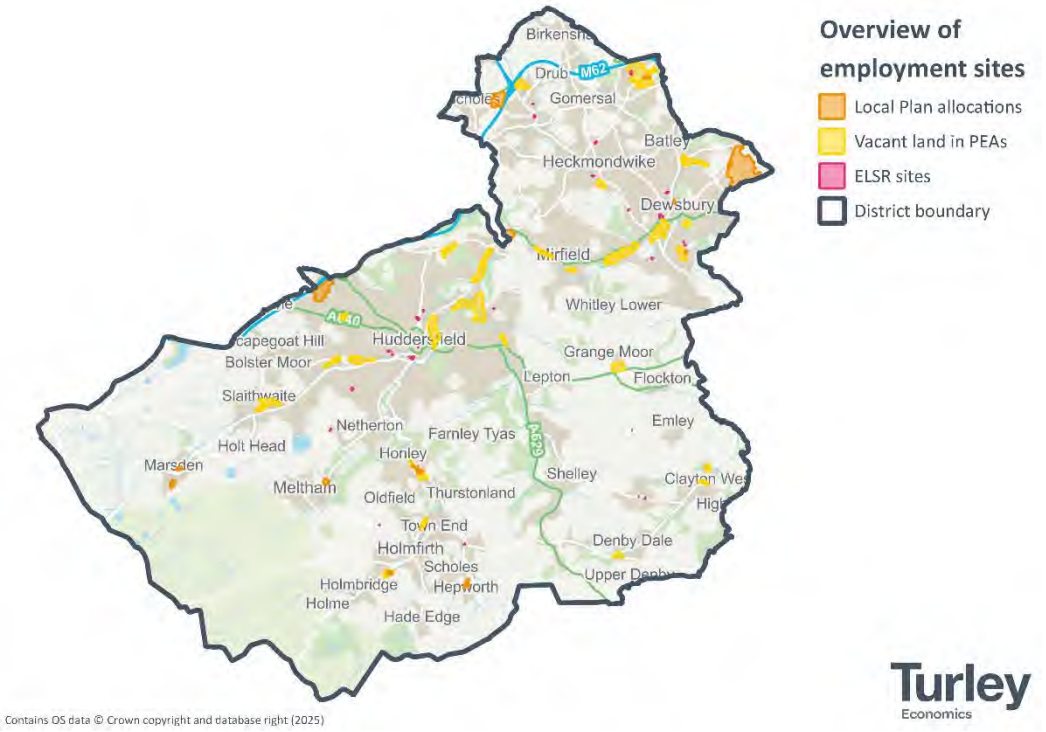
- **Sites from the Employment Land Supply Review (ELSR)** – the Council has actively monitored the identified supply of employment sites (non-allocations) following the adoption of its Local Plan. It has removed sites which were completed or archived before 2021/22, and retained others that are yet to have been fully developed. These sites include those which have commenced development and/or have planning permission as well as those which do not.

- **Local Plan allocations** – these sites are existing allocations in the adopted Kirklees Local Plan.

- **Vacant land in Priority Employment Areas (PEAs)** – as explained in section 2 the adopted Kirklees Local Plan identified a series of PEAs. Sites which the Council believed to have vacant land remaining have been assessed. It is noted that the assessment undertaken by Aspinall Verdi confirmed a number of these have subsequently been developed out, or are assessed as being unsuitable to accommodate future development, and this is therefore highlighted where necessary.

6.3 The location of these sites is shown at Figure 6.1 overleaf, which also provides a breakdown between the four categories above.

Figure 6.1: Employment Sites Overview



Source: Turley / Aspinall Verdi, 2025

Existing supply of employment land

6.4 The Council has provided net site areas for each of the 116 sites. Table 6.1 breaks down the existing supply into the three categories, showing a total supply of 140.36ha of employment land. This represents a notable reduction from the supply of 193ha that was reported at the time of the Local Plan's adoption, as referenced in section 2. This reflects the take-up of land as detailed in the previous section.

Table 6.1: Existing supply of employment land

Source	Total net site area (ha)	%
Local Plan allocations	70.9	51%
Vacant land in Priority Employment Areas (PEAs)	63.45	45%
Employment Land Supply Review (ELSR)	5.96	4%
Total	**140.31**	**100%**

Source: Turley / Aspinall Verdi, 2025

6.5 It is apparent from the above that Local Plan allocations account for just over half (51%) of the Council's identified supply, providing 70.9ha of land in total. This has reduced from the 95ha of allocated land identified in the adopted Plan, positively showing that a proportion of this land has been successfully taken-up. It is noted, however, that a large amount remains undeveloped.

6.6 The other significant component of supply is the vacant land in PEAs, representing 63.45ha and 45% of the supply. It is noted that this exceeds the 48ha of land identified from these areas in the adopted Local Plan, with this reflecting the Council's identification of additional land within these areas in the intervening period.

6.7 In assessing the sites Aspinall Verdi have provided a commercial view on the type of employment that would be most likely on each site. The outcome of this exercise is shown at Table 6.2.

Table 6.2: Potential employment typology

Potential **use**	Total net site area (ha)	%
Mixed	125.32	89%
Industrial / warehouse	11.08	8%
Office	2.66	2%
Other / non-identified	1.25	1%
Total	**140.31**	**100%**

Source: Turley / Aspinall Verdi, 2025

6.8 It is evident that the vast majority of land, some 90%, is identified by Aspinall Verdi as being suited to a mix of employment uses. This is symptomatic of the nature of much of the land whereby it is formed either by small sites located in employment areas with an existing mix of employment uses, or larger allocations that can respond to market demand to accommodate a range of different commercial floorspace.

6.9 It is noted that only 2.66ha of land is specifically identified as being most likely to be suitable for office space[61].

Identified losses to existing supply

6.10 Following site visits and an appraisal of available information, Aspinall Verdi identified that there were a small number of sites where development had completed and thus there was no longer an opportunity to provide new commercial space. Further sites were also identified as having been 'sterilised' for the future delivery of commercial floorspace either permanently or over a reasonable period of time as a result of, for example, the Trans Pennine Route upgrade or the development of a temporary waste recycling centre. These sites – all categorised either as ELSR sites or vacant land in PEAs – collectively offered only 1.65ha but do therefore need to be removed from the supply, leaving a residual remaining supply of 138.66ha[62]. The following table confirms the effect of removing these sites from the supply.

[61] This includes 6 sites: PEA3 / PEA46 / PEA80 and ELSR sites: 1 Ramsden Street (AV 14), Land north of Folly Hall Mill (AV 18), WG & R Communication Ltd, Blackmoorfoot Road (AV 19)

[62] These sites are: Priority Employment Areas - PEA40 / PEA7 / PEA80, they also include ELSR sites: Jagger Hill Farm (AV 24), Land to the east of 105 Heckmondwike Road (AV 7), Nickerson Chemicals Ltd (AV 10), The Chartist 74 Commercial Road (AV 3)

Table 6.3: Existing supply of employment land accounting for AV identified losses

Existing supply	Total net site area (ha)	%
Employment Land Supply Review (ELSR)	5.6	4%
Local Plan allocations	70.9	51%
Vacant land in Priority Employment Areas (PEAs)	62.16	45%
Total	**138.66**	**100%**

Source: Turley / Aspinall Verdi, 2025

Assessment methodology

6.11 Aspinall Verdi's assessment provides a quantitative understanding of the employment land supply, as well as a qualitative assessment. To inform the latter Aspinall Verdi have worked with the Council to develop a criteria-based scoring proforma – outlined at **Appendix 3** – which enables a ranking of each site's performance taking into account market insight along with other factors affecting their likely attractiveness to the market. In summary Aspinall Verdi have assessed each site based on:

- **Market signals** – this considered the scale of the development opportunity on the site, evidence of current market appeal to national and international companies or perceived future appeal to such occupiers, the potential for a clustering effect (or existing evidence thereof) recognising the emphasis placed on this within the UK's Modern Industrial Strategy and an indicator of current demand with regards occupancy levels or perceived market demand judged by Aspinall Verdi.

- **Physical signals** – this considered the prominence of the site based on its accessibility via the road network and the quality of the external environment of the site with regards its setting.

- **Sustainability signals** – this considered the site's strategic access as judged by its proximity to a strategic road junction and/or more local road junction and the nature of access accounting for congestion. Consideration was also given to walkability to public transport and services, the proximity to urban areas and access to labour and services.

6.12 Whilst sites were scored and assigned to a broad Red Amber Green (RAG) spectrum based on the above framework it is recognised that there is a necessary degree of judgement in the scoring process. On this basis Aspinall Verdi applied judgement based on their qualitative assessment of their suitability and market attractiveness drawing on the input information, their market knowledge and additional qualitative information including that which was gathered through site visits.

6.13 It is important to acknowledge that the assessment is based on a consideration of current conditions and the intrinsic qualities of each site. The scoring of sites would be

subject to change in the future reflecting the evolution of the market and/or other factors. It should be noted that scoring of the sites is not intended to represent a Sustainability Appraisal, and also that no viability work has been undertaken to inform the assessment.

6.14 The assessment outlined below covers all of the sites assessed by Aspinall Verdi as shown in Table 6.1. Sites suggested as no longer being available to form part of the current supply, discounted at Table 6.3, are still included in this exercise for completeness.

Overview of the site assessment results

6.15 Table 6.4 profiles the 116 sites based on their overall scores.

Table 6.4: Existing supply of employment land by score

Site score	Number of sites	Total net site area (ha)	% of land*
35+ (Very good)	6	16.14	12%
30-34 (Good)	29	95.38	68%
25-29 (Average)	35	20.72	15%
20-24 (Poor)	33	6.88	5%
13-19 (Very poor)	13	1.19	1%
Total	**116**	**140.31**	**100%**

Source: Turley / Aspinall Verdi, 2025 ** rounded and therefore do not sum*

6.16 The above shows that a large amount (80%) of the employment land available in Kirklees is classified as 'very good' or 'good'. It is important to note that the significant majority are in the latter category with only circa 16.1ha classed as 'very good'. There is also an important distinction with regards the number of sites where less than a third (30%) fall in these categories and over a third are classified as 'poor' or 'very poor'. This reflects the nature of the sites as many of those that received this grade were smaller in scale, as explored further below.

ELSR sites

6.17 It is evident from the above that whilst there are 27 ELSR sites their combined site area forms a relatively modest proportion of the overall supply. These sites do though represent an immediate supply of land and it is noted that five are deemed as having commenced and a further 13 are categorised by the Council as having an active planning permission. This suggests a risk that this supply will be further eroded in the short to medium term.

6.18 Table 6.5 overleaf provides an overview of the sites, showing their ranking by Aspinall Verdi.

Table 6.5: Assessment of ELSR sites

Ref.	Name	Net site area (ha)	Rank
22	Land adj 60, Northgate, Cleckheaton, BD19 3NB	0.46	**33**
23	Heckmondwike Depot, Beck Lane, Heckmondwike, WF16 0JZ	0.20	**33**
4	Land to the east of, Ocado, Dark Lane, Birstall, Batley	0.58	**32**
18	Land north of, Folly Hall Mill, Chapel Hill/Manchester Road, Huddersfield	0.97	**32**
14	1, Ramsden Street, Huddersfield	0.01	**31**
19	WG & R Communication Ltd, Blackmoorfoot Road, Crosland Moor, Huddersfield	0.26	**30**
13	75 Bradford Road, Huddersfield	0.83	**28**
15	Land at, Allen Row, Paddock, Huddersfield	0.19	**28**
11	Six Lane Ends Public House, Six Lane Ends, Heckmondwike, WF16 9DQ	0.31	**25**
16	The Triangle, 11, Market Street, Huddersfield, HD1 4RN	0.10	**25**
17	Elf Forklifts Ltd, Alder Street, Huddersfield	0.05	**25**
10	Nickerson Chemicals Ltd, Mill Street East, Dewsbury	0.13	**24**
5	Spenbeck Business Park, Balme Road, Cleckheaton	0.17	**24**
8	Vulcan Works, HB Food Services, Vulcan Road, Eightlands, Dewsbury	0.53	**24**
25	Thorncliffe Farm Shop, 1, Westfield Lane, Emley Moor, Huddersfield, HD8 9SZ	0.01	**24**
27	Firths Yard, 25, Mill Road, Dewsbury, WF13 2TG	0.14	**24**
2	Glendale Mills, Sheffield Road, New Mill, Holmfirth	0.14	**23**
9	Land North of 3, Forge Lane, Dewsbury	0.32	**23**
24	Jagger Hill Farm, Jagger Hill, Kirkheaton, Huddersfield, HD5 0QZ	0.08	**23**
21	Firths Yard, Mill Road, Dewsbury, WF13 2HP	0.10	**22**
12	Greenside Jonery Works, School Street, Oakenshaw, Cleckheaton	0.05	**21**
6	Land at George Street, Dewsbury	0.05	**18**
7	Land to the east of, 105, Heckmondwike Road, Dewsbury	0.01	**17**
20	Moor End Farm, Moor Street, South Crosland, Huddersfield	0.08	**17**
3	The Chartist, 74, Commercial Road, Skelmanthorpe, Huddersfield, HD8 9DT	0.14	**16**
1	Moorgate Farm, Moor Lane, Netherthong, Holmfirth	0.03	**13**
26	18, Commercial Road, Skelmanthorpe, Huddersfield, HD8 9DA	0.02	**12**

Source: Turley / Aspinall Verdi, 2025

6.19 The above suggests that across the ELSR sites there are no 'very good' classified sites and only six sites, totalling 2.47ha, are classed as 'good'. Land North of Folly Hall Mill alone accounts for almost 1ha of this total. Most sites are classified as 'average' and six are 'poor' or 'very poor', albeit these are all notably small sites such that they collectively total only a third of a hectare (0.33ha).

Local Plan allocations

6.20 Whilst relatively limited in number, the Local Plan allocations form a significant proportion of the overall supply. Several are no longer considered to represent potential employment land by the Council, reflecting their take-up or change of use. The assessment of the remaining allocations identified by the Council is summarised at Table 6.6 overleaf.

Table 6.6: Assessment of Local Plan Allocations

Site ref.	Name	Net site area (ha)	**Rank**	Market overview and AV observations
32	ES9: Former Cooper Bridge Waste Water Treatment Works, Leeds Road, Mirfield	4.26	**35**	AV confirm that whilst the site has not progressed (noting original allocation was 4.26ha) it represents a very commercially attractive location with good access to the M62. It is understood that the site is currently subject to an outline application which proposes delivery of B8 floorspace to accommodate the expansion of an existing local business. It is acknowledged though that delivery challenges remain, recognising the site's use as a former waste waterworks along with several known site constraints. Subject to the outcome of the planning process AV note that these delivery challenges could limit the site's capacity to contribute to the supply of commercial floorspace in the immediate term but recognise through the strong scoring the market potential of the site.
38	MXS3: Land south of Lindley Moor Road, Lindley, Huddersfield	6.30	**35**	AV confirm that whilst the eastern part of the site remains undeveloped it is a strong employment site to accommodate a mix of commercial floorspace, including warehousing and industrial units acknowledging reasonable proximity to the strategic road network. The site has seen the complete development of the western side and secured planning permission for these types of uses on the remaining undeveloped eastern plot, albeit it is understood that revisions to the permission are likely to be sought.

Site ref.	Name	Net site area (ha)	**Rank**	Market overview and AV observations
30	ES5: Land to the north, Crossroad Commercials Ltd, Pheasant Drive, Birstall, Batley	1.82	**34**	Whilst the site has not progressed (noting originally allocated for 1.82ha) AV conclude that it remains a comparatively strong site and is located within an established industrial area with good access to distributor roads. It is understood that the site has been held by existing owners to accommodate potential future business expansion that would provide additional floorspace but means that it would not be available for wider occupation. Whilst the timing of development is determinant on the basis on the existing owners plans it is at this point in time not considered to provide an immediate contribution to supply.
31	ES6: Land to the north and west of, The Royds, Whitechapel Road, Cleckheaton	10.68	**34**	AV observe that whilst the site has not progressed (originally allocated for 10.68ha) this represents a potentially high-quality employment site, recognising proximity to the M62 and potential to secure access. There are acknowledged site constraints which will impact on viability and limit the ability of the site to provide immediate provision of floorspace. It is understood that there is potential for the net developable area to be greater than that reflected in the current allocation, albeit this will need to be determined through a full consideration of potential site mitigation measures to respond to identified constraints.
39	MXS7: Land east of, 932-1110 Leeds Road, Shaw Cross/Woodkirk, Dewsbury	35.00	**33**	This is the largest of the Local Plan allocations and remains wholly undeveloped. It is a mixed-use allocation and AV consider that it represents a strong employment site where it has reasonable access to the strategic road network. It is noted that the potential mix of employment uses will need to be carefully planned to mitigate the site's proximity to existing residential areas and planned housing.

Site ref.	Name	Net site area (ha)	**Rank**	Market overview and AV observations
36	MXS5: Lees House Farm, Leeds Road, Dewsbury	1.09	**32**	This employment site represents a plot within a much larger urban extension. It has relatively strong proximity to the strategic road network. However, AV observe that the relatively small size of the site and its proximity to planned housing would limit its commercial market appeal. The higher value associated with residential uses is an important consideration in the context of acknowledged deliverability challenges.
37	ES11: Land at Spinksmire Mill, Huddersfield Road, Meltham, Holmfirth	3.24	**30**	This allocation has not progressed (3.24ha being originally allocated) with a planning application having expired over five years ago. AV consider that the site offers the potential to continue to appeal to smaller local businesses and potential office occupiers noting the proximity to residential development, including recently delivered new homes.
29	ES4: Land south of Tilcon Coal Yard, Bretton Street, Dewsbury	0.83	**29**	The site remains un-developed (allocated for 0.83ha) but is understood to have been resurfaced, being currently in use as a storage yard, with a planning application recently submitted for a two storey circa 2,550 sqm gross industrial unit (Use Class E(g)(iii). It is located within an established industrial area with reasonable access to a distributor road and therefore continues to offer potential for new employment floorspace.
35	ES13: Land north-east of Bottoms Mill, Woodhead Road, Holmfirth	1.12	**29**	The site remains undeveloped (allocated for 1.12ha) and AV note that whilst it is in an established location for employment uses there is more limited market demand. It is suggested as remaining a reasonable site to accommodate local businesses albeit there are recognised deliverability challenges impacting on delivery.
28	ES3: Land to the north-east of 1-3 Greaves Road, Dewsbury	0.68	**27**	The site remains undeveloped (allocated for 0.68ha) but AV note that it is in an established employment area with access and could appeal to local businesses.

Site ref.	Name	Net site area (ha)	**Rank**	Market overview and AV observations
33	ES10: Former Brook Motors Playing Fields, New Mill Road, Brockholes	1.26	**27**	The site remains undeveloped (allocated for 1.26 ha), albeit the Council's engagement with the landowners has identified that they remain keen to develop the site and AV note it is in an established employment area with front access to a distributor road and could accommodate a reasonably sized unit, albeit in an area of comparatively lower market demand. The distance from the strategic road network means that it is more likely to appeal to local businesses and there are recognised deliverability challenges.
34	ES12: Land west of, Honley Business Centre, New Mill Road, Honley	2.37	**27**	The site remains undeveloped with AV observing that whilst it in an established employment area it has limited connections to the strategic road network and is not close to a larger settlement limiting its market demand. It is understood that an area of land has recently been sold with the intention for commercial development to progress, however, no application has been submitted at the time of writing and AV note that deliverability is likely to be affected by market demand.
40	MXS10: Bank Bottom Mills, Mount Road, Marsden, Huddersfield	1.13	**26**	Given the nature of the existing building AV note that viability challenges will impact deliverability, albeit the site has good access to the proximate town centre and rail station. If the site is developed it is identified as being more likely to deliver workspaces and incubator units.
41	MXS11: New Mills, Brougham Road, Marsden, Huddersfield	0.85	**26**	This site is like the above albeit it is understood that £5.6m of funding has been awarded to support its redevelopment with a planning application progressing. AV believe that if viability challenges are overcome there is the potential to accommodate smaller businesses within small workspaces albeit the demand would need to be assessed.

Site ref.	Name	Net site area (ha)	**Rank**	Market overview and AV observations
42	MXS12: Dobroyd Mills, Hepworth Road, Hepworth, Holmfirth	0.27	**20**	The Council have identified that the former mill building has been demolished but AV consider the current state of the site and surrounds likely to create viability challenges and limit demand. They observe that there would likely be limited market demand for the types of units able to be developed in this location and any demand would be generated locally, acknowledging that the Council has recorded historic interest in the site from local businesses.

Source: Turley / Aspinall Verdi, 2025

6.21 The 15 Local Plan allocations form a significant proportion of the supply, as noted earlier. It is though evident from the above that there is significant variation in the size of the allocations. Over half of the supply (35ha) is concentrated on Land East of 932-1110 Leeds Road, with Land to the north and west of the Royds the only other site offering at least 10ha. In the case of the latter, Aspinall Verdi observe that whilst it could perform more of a 'strategic' role to service larger needs its scale, based on the assessed net area, currently limits the provision of larger units that are more often accommodated on such sites. It is understood that the gross area at 24ha could potentially accommodate larger uses and therefore the potential exists, subject to a justified increase to its developable area, to contribute to meeting the needs of larger users.

6.22 Looking at the qualitative assessment a reasonable proportion of the land is classed as 'good' or 'very good'. However, many of the allocations that score more highly are not anticipated to provide new floorspace in the short to medium term, due to recognised development constraints and limited evidence of live planning applications. This means that immediate demand is primarily directed to sites performing less well, although these generally have less prominent positions or do not have the same access to the strategic road network.

6.23 Those allocations scoring lowest include several conversions or sites which are relatively far from the strategic road network. While Aspinall Verdi observe that these sites could accommodate local demand, there are identified deliverability challenges which will affect whether they will be available to accommodate investment and business growth. It is also understood that where sites are in proximity to residential areas, including new homes, development value and limited market demand suggests a degree of flexibility may be appropriate in enabling development to progress.

Priority Employment Areas

6.24 As set out in section 2, the Local Plan includes 48ha of land located in Priority Employment Areas (PEAs). The Council assessed this supply in October 2016 within a Local Plan Methodology Paper. In identifying this supply of land, the focus was on existing employment sites within which available land should be protected from non-employment uses, especially where this supply of land could assist in delivering the economic objectives of the LCR SEP and the KES and where there was evidence of loss to other competing uses (primarily housing). Sites were identified based on their previous designation within employment typical urban areas (ETUAs) and the Employment Land Supply Review (ELSR) as well as a visual desk-based study.

6.25 The identified PEAs were scored based on several criteria considering their strategic alignment with economic objectives, the age of properties, internal site arrangements, constraints such as flooding and neighbouring uses as well as their accessibility to motorway junctions.

6.26 Where the Local Plan Inspector confirmed their inclusion within the identified supply of employment land, the relative limitations of this source of land to meet business needs was identified in the Council's hearing statement for the examination. This reflected the Council's view that:

"This potential supply would be suitable for business and industrial use; but with a limited market appeal, due to size restrictions and in some instances land locking making this element of the supply suitable for expansion of neighbouring businesses only. In view of this, the Council has not allocated the undeveloped parcels of land within Priority Employment Areas but felt it prudent to still acknowledge its development potential as windfall"[63]

6.27 The assessment of the 74 current PEAs with vacant land remaining is summarised at Table 6.7. It is important to note that these represent a relatively substantial proportion of the overall supply, reflecting the Council's continued identification of PEAs subsequent to the allocation of the Local Plan. It is though the case that the overall contribution of the PEAs to the total supply is significantly affected by the inclusion of a single site (PEA12) which is identified by the Council as being over 20ha. This site is in single ownership and whilst its distance from the strategic road network is noted it is classified by Aspinall Verdi as 'good' due to the opportunity it presents as a larger site to accommodate local business growth.

[63] Kirklees Local Plan Examination MIQs Council Response Matter 6 – Employment needs and delivery, paragraph 1.9

Table 6.7: Assessment of PEAs with vacant land remaining

Site ref.	Local Plan ref.	Name	Net site area (ha)	Rank
97	PEA8	Land North of, Sicame Electrical, Leeds Road, Huddersfield	0.31	**36**
106	PEA3	Phase 11a, Bradley Business Park, Old Lane/ Bradley Road, Bradley, Huddersfield	0.71	**36**
108	PEA12	Land E of River Colne, Syngenta, Leeds Road, Huddersfield	1.88	**35**
109	PEA12	Land South of River Colne, Syngenta, Leeds Road, Huddersfield	2.68	**35**
68	PEA46	Phase III, Centre 27 Business Park, Bankwood Road, Birstall, Batley	0.83	**34**
92	PEA51	Land East of Interchange, Whitehall Road, Cleckheaton	1.21	**34**
107	PEA3	Bradley Business Park, Longbow Close, Bradley, Huddersfield	0.03	**34**
110	PEA12	Land NE of Briery Bank, Syngenta, Leeds Road, Huddersfield	0.68	**34**
111	PEA12	Land W of Dalton Bank Road, Syngenta, Leeds Road, Huddersfield	20.42	**34**
66	PEA46	Centre 27, Gelderd Rd, Birstall, Batley	0.87	**33**
91	PEA51	Land East of, Stubs Beck Lane, Cleckheaton	0.74	**33**
59	PEA1	Land to the south of, Tandem Industrial Estate, Tandem Way, Fenay Bridge, Huddersfield	0.45	**32**
67	PEA46	Mars Complimentary Petcare Europe, Oakwell Way, Birstall, Batley	4.36	**32**
84	PEA32	Land East of Bretfield Court, Bretfield Court, Dewsbury	0.62	**32**
102	PEA16	Gas Works Private Car Park, Gasworks Street, Huddersfield	2.80	**32**
103	PEA16	Land north of, Kirklees College Manufacturing Centre, Turnbridge Road, Huddersfield	0.60	**32**
54	PEA82	Honley Works, Brook Hanson Ltd, Brockholes Rd, Honley, Huddersfield	2.04	**31**

Site ref.	Local Plan ref.	Name	Net site area (ha)	Rank
57	PEA87	Land between Unit 2 and Warehouse, Jubilee Way, Grange Moor, Huddersfield	0.43	**31**
60	PEA87	Land North of Wakefield Road, Jubilee Way, Huddersfield	2.48	**31**
65	PEA68	Land South of Hartcliffe Mills, Barnsley Road, Denby Dale, Huddersfield	2.27	**31**
70	PEA46	Land North-East of Ocado, Dark Lane, Birstall, Batley	0.11	**31**
101	PEA16	Land west of, Gas Club, Gasworks Street, Huddersfield	0.13	**30**
49	PEA83	Thongsbridge Mills, Units 1,2 & 3, Huddersfield Road, Thongsbridge, Holmfirth	1.04	**29**
50	PEA83	Land south of, 274, Woodhead Road, Thongsbridge, Holmfirth	0.72	**29**
82	PEA37	Land West of Centurion House, Thornhill Road, Dewsbury	0.51	**29**
98	PEA7	Land north east of, C J Antich & Sons, Station Road, Bradley, Huddersfield	1.04	**28**
53	PEA84	Land North of, Bottoms Mills, Woodhead Road, Holmfirth	0.40	**28**
71	PEA43	Rest Assured, Grange Rd (North), Batley	0.62	**28**
78	PEA37	Land West of, Calder Bank Mills, Calder Bank Road, Dewsbury	0.31	**28**
79	PEA37	Land North of, Calderbank Mills, Calderbank Road, Dewsbury	0.29	**28**
83	PEA29	Land North of, 9, Cardwell Terrace, Savile Town, Dewsbury	0.98	**28**
87	PEA34	Land West of, Chem Waste Ltd, Low Mill Lane, Ravensthorpe, Dewsbury	0.79	**28**
55	PEA80	Riverside Works, Woodhead Road, Honley, Huddersfield	0.52	**27**
80	PEA37	Land West, Former Ancor Mills, Webster Hill, Dewsbury	0.06	**27**
116	PEA22	Land East of Crosland Road, Crosland Road, Oakes, Huddersfield	0.05	**27**
117	PEA22	Land West of Merrie England, New Hey Road, Oakes, Huddersfield	0.13	**27**

Site ref.	Local Plan ref.	Name	Net site area (ha)	Rank
96	PEA38	Land North of Elite Hand Carwash, Huddersfield Road, Mirfield	0.25	**26**
113	PEA77	Land East of, 22, Britannia Road, Milnsbridge, Huddersfield	0.54	**26**
114	PEA72	Land North of Royal Terrace, Crow Lane, Milnsbridge, Huddersfield	0.83	**26**
56	PEA82	Land North-East of Hope Bank Works, Woodhead Road, Honley, Holmfirth	0.24	**25**
58	PEA1	Tandem Industrial Estate, Mikron Ltd, Tandem Way, Waterloo, Huddersfield	0.26	**25**
77	PEA37	Land South of, 2, Webster Hill, Dewsbury	0.11	**25**
81	PEA37	Land off, Webster Hill, Dewsbury	0.22	**25**
99	PEA7	Land south west of, Bradley Nursery, Leeds Road, Bradley, Huddersfield	0.55	**25**
118	PEA61	Land adj (2 of 2), Spa Fields Industrial Estate, Spa Fields, Slaithwaite, Huddersfield, HD7 5BB	0.26	**25**
119	PEA61	Land adj (1 of 2), Spa Fields Industrial Estate, Spa Fields, Slaithwaite, Huddersfield, HD7 5BB	0.34	**25**
52	PEA84	Land East of, Market, Woodhead Road, Holmfirth	0.52	**24**
61	PEA67	Wesco Aircraft Ltd, Park Mill Way, Clayton West, Huddersfield	0.15	**24**
69	PEA46	Dransfield Cabinets Ltd, Unit 4, Norquest Industrial Park, Birstall, Batley	0.04	**24**
72	PEA43	Land East of, Soothill Business Park, Soothill Lane, Batley	0.23	**23**
75	PEA43	Land North of Soothill Business Park, Soothill Lane, Soothill, Batley	0.11	**23**
76	PEA27	Thomas Chadwick & Sons, Sands Lane, Dewsbury	0.39	**23**
89	PEA56	Land rear of Spen Vale Works, Spen Vale Street, Heckmondwike	0.13	**23**
93	PEA40	Land South of, Gill Bridge Works, Lowlands Road, Mirfield	0.10	**23**
104	PEA18	Brittannia Mills, Stoney Battery Road, Crosland Moor, Huddersfield, HD1 4TL	0.39	**23**

Site ref.	Local Plan ref.	Name	Net site area (ha)	Rank
105	PEA18	DLT, Stoney Battery Road, Huddersfield	0.04	**23**
112	PEA77	Habasco International Ltd, Bank House Lane, Milnsbridge, Huddersfield	1.05	**23**
62	PEA66	Plot 3 at, Park Mill Colliery, Colliers Way, Clayton West, Huddersfield	0.10	**22**
63	PEA66	Land North of Park Mill, Colliers Way, Clayton West, Huddersfield	0.67	**22**
64	PEA66	Land South of Victoria Court, Colliers Way, Clayton West, Huddersfield	0.24	**22**
74	PEA43	Land South-East of Quantum House, Mill Forest Way, Soothill, Batley	0.08	**22**
46	PEA63	Lees Mill, Lees Mill Lane, Slaithwaite, Huddersfield	0.08	**21**
47	PEA63	Land North-East of, River Dene, Lees Mill Lane, Slaithwaite, Huddersfield	0.18	**21**
48	PEA63	Land West of, River Dene, Lees Mill Lane, Slaithwaite, Huddersfield	0.10	**21**
51	PEA83	Land rear of, Pickwick Mills, Huddersfield Road, Holmfirth	0.08	**21**
88	PEA56	Land at, Cater Lane, Off Spen Vale Street, Heckmondwike, WF16 0NQ	0.12	**21**
94	PEA40	Former Works, Station Road, Mirfield	0.08	**21**
73	PEA45	Land South of Batley Station, Back Station Road, Batley	0.20	**19**
85	PEA35	Land West of Greenwood Lock House, Off Low Mills Lane, Ravensthorpe, Dewsbury	0.06	**19**
86	PEA35	Land South-East of JMHC Logistics, Off Low Mills Lane, Ravensthorpe, Dewsbury	0.03	**18**
95	PEA40	Land North of Mirfield Station, Station Road, Mirfield	0.22	**18**
115	PEA73	Land at, Stanley Mills Business Park, Britannia Road, Milnsbridge, Huddersfield	0.14	**17**
90	PEA56	Land South-East of Concept Business Park, Spen Vale Street, Heckmondwike	0.07	**16**
100	PEA7	Land south-west of, PBSC Ltd, Bradley Junction Industrial Estate, Leeds Road, Bradley, Huddersfield	0.14	**16**

6.28 There is evidently a broad spread of sites based on Aspinall Verdi's scoring. It is important to note that less than a third (22) of the PEAs receive a 'good' or 'very good' rating, with this representing a total of circa 46.65ha of supply. In contrast over a third (28) of the sites are scored as 'poor' or 'very poor'.

6.29 Where the overall scoring provides a helpful comparative analysis Aspinall Verdi are clear to identify through the site assessments that on the whole the sites continue to offer the opportunity to provide new employment floorspace. In many cases the small nature of sites, surrounding uses, access issues or the fact that sites are only suitable for the expansion of the current business means that they do not provide a reasonable market proposition to accommodate much of the demand for new floorspace considered in section 5. Indeed, they have considerable limitations, in the majority of cases, in providing an attractive proposition for the types of businesses categorised as within growth sectors and as part of the NPPF referenced '*modern economy*'.

6.30 Looking at the size profile provides an insight in this regard where it is the case that there are only 12 sites which are larger than 1ha, with this including the 20ha site referenced above.

Geographic distribution

6.31 The identified supply of employment sites has been disaggregated by the three economic market areas in Table 6.8.

Table 6.8: Distribution of employment land by economic market area

Employment land	North Kirklees		Huddersfield		South Kirklees		Total	
	No.	Area (ha)	No.	Area (ha)	No.	Area (ha)	No.	Area (ha)
ELSR sites	13	3.05	9	2.57	5	0.34	27	5.96
Local Plan allocations	7	54.36	1	6.30	7	10.24	15	70.90
Vacant land in PEAs	31	14.74	18	33.03	25	15.68	74	63.45
Total	**51**	**72.15**	**28**	**41.90**	**37**	**26.26**	**116**	**140.31**

Source: Turley / Aspinall Verdi, 2025

6.32 North Kirklees is responsible for the largest share of sites in the employment land supply (44%) and for more than half of the overall land supply (51%) in a sign that its sites are slightly larger than average[64]. Most are vacant sites within existing PEAs but these are typically small, averaging only 0.5ha which is nearly half the size of the average such site in Kirklees (0.9ha). The area has seven existing allocations, matching the number in South Kirklees but being over five times larger on average (7.8/1.5ha). North Kirklees also has 13 ELSR sites but these are again very small, each averaging only 0.2ha.

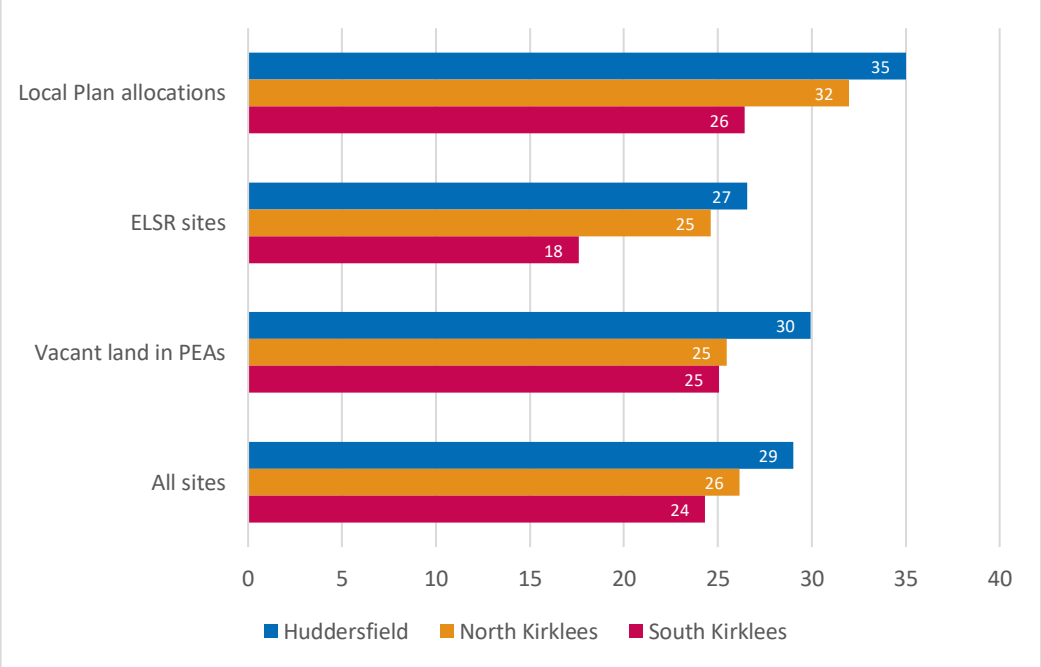
[64] The average site in North Kirklees is circa 1.4ha in size, slightly behind Huddersfield (1.5ha) but above the borough average (1.2ha) which is lower due to the prevalence of smaller sites in South Kirklees (0.7ha)

6.33 South Kirklees has around a quarter less employment sites than North Kirklees, but around two thirds less land due to their relatively small size. The vast majority – some 68% – are vacant sites within existing PEAs, each offering an average of 0.6ha which is roughly a third lower than the average throughout the district (0.9ha).

6.34 Huddersfield has the fewest employment sites of the three market areas, with most again being vacant sites within existing PEAs. These sites do though tend to be around twice as large as the district average (1.8/0.9ha) and the area is also characterised by its larger remaining allocation (6.3/4.7ha) and ELSR sites, even if the latter continue to be small with each averaging only 0.3ha.

6.35 The quality of sites in each area can also be broadly understood using the scores attributed by Aspinall Verdi. Figure 6.2 calculates an average for each category of land in each market area. This suggests that Huddersfield generally has the highest scoring sites, with an average score of 29 which is only just short of 'good' according to the criteria set out at Table 6.4. Sites in South Kirklees contrastingly received an average score of 24, classed as 'poor', primarily due to its ELSR sites which were typically ranked as 'very poor'. Existing allocations in Huddersfield received the highest score in the district, albeit this does relate only to a single site that is classed as 'very good'. Existing allocations also scored highly in North Kirklees, outperforming other land in this area which generally classed as or approaching 'good'.

Figure 6.2: Average site scores by category and market area



Source: Turley / Aspinall Verdi, 2025

Summary

6.36 The review of the existing supply of employment sites in Kirklees by Aspinall Verdi has identified that they have a combined net area of **140.31ha**. Over half of this land is in North Kirklees, with this area generally offering larger sites than is typical in the district

albeit with the average site still smaller than in Huddersfield. South Kirklees has sites that are only around half as large, on average.

6.37 Removing a small number of sites identified by Aspinall Verdi as no longer available reduces the overall supply by a modest 1.65ha, to **138.66ha**.

6.38 This land is identified as having the potential to accommodate various uses, albeit in terms of site area the majority is classified as being suited to mixed use schemes. Only 2.66ha is identified as suitable principally for offices, albeit it is recognised that space of this kind could also be delivered on those sites suited to mixed uses.

6.39 In considering the quality of the existing supply identified by the Council, only around 16.14ha is classified as 'very good' based on the assessment undertaken by Aspinall Verdi. Just over 95ha is though classed as 'good', such that approximately 80% of the assessed land receives a positive score. A further circa 21ha is classed as 'average'. Sites in North Kirklees and particularly Huddersfield tended to score highest, whereas sites in South Kirklees – and especially its ELSR sites – generally received lower scores.

6.40 A relatively large number of sites, notably small in size, are classed as 'poor' or indeed 'very poor'. A total of 46 sites fall in these categories, representing approximately 40% of all sites, whilst representing only just over 8ha of employment land. These include ELSR sites and current PEAs. In the case of the latter of the 74 current PEAs sites 28 fall within these categories. This highlights the limitations of these small sites in meeting occupier requirements and satisfying demand within the market.

6.41 Indeed, of all sites only three are larger than 10ha and could thus be reasonably viewed as 'strategic' in scale. Two of these are existing allocations, with only the largest (Land East of 932-1110 Leeds Road) deemed by Aspinall Verdi as truly strategic in scale, based on the current assessed net developable area. The other is a PEA (PEA12) that is in single ownership but not sufficiently close to the strategic road network to be deemed able to accommodate strategic market demand but recognised as a 'good' site able to meet the demands of local businesses potentially. This represents a comparatively modest portfolio of sites to respond to future strategic needs and accommodate those occupiers looking for larger units close to the strategic road network.

6.42 Finally, Aspinall Verdi's assessment highlights that much of the supply and in particular those sites scoring more positively, have limited potential to provide an immediate supply of floorspace where there are acknowledged development constraints or a lack of progress in detailed planning applications, or they have been identified as likely to more suitable to accommodate business expansion. This again represents an important consideration with regards to the capacity of the identified sites to respond positively to the scale and profile of need identified in the previous section.

7. Supply and Need Implications

7.1 This section commences by undertaking a quantitative balancing exercise, drawing from the analysis presented in sections 5 and 6 of this report. While it aligns with that analysis in focusing solely on Kirklees, it is acknowledged that the district's position within West Yorkshire – and the functional relationships that section 3 shows have been sustained – will also influence demand, as well as being an important consideration in evaluating supply.

7.2 Qualitative considerations are then taken into account to reflect:

- The extent to which the Council's current identified supply meets the needs of the modern economy. This recognises the stated economic ambitions and objectives of the Council and the contribution of identified growth sectors within the overall assessment of need. Aspinall Verdi provide their commercial market insights to occupier requirements within these sectors of the economy.

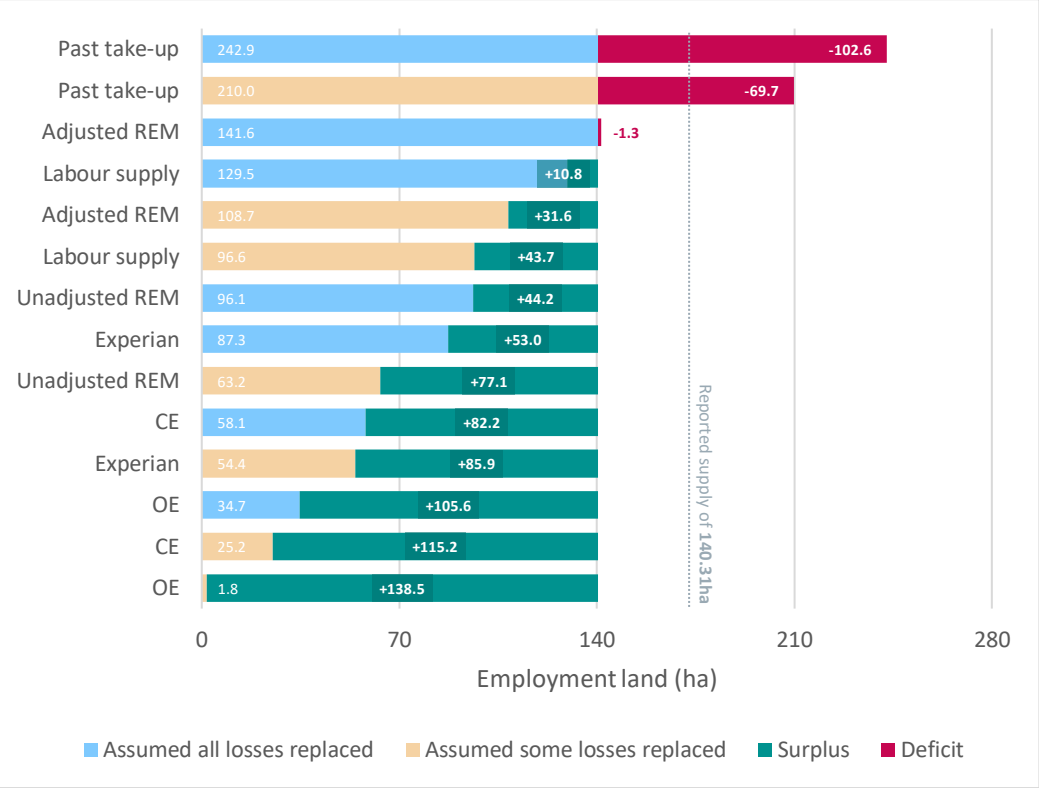
- How the demand for office space specifically has changed following the COVID-19 pandemic and the implications this has for the provision of office floorspace within town centres and on other sites across the district.

- The needs of the rural economy, recognising the extent to which parts of Kirklees are defined as rural and the specific requirement of the NPPF to support these areas so as to ensure a prosperous growing economy.

Quantitative balance

7.3 Figure 7.1 overleaf presents an initial quantitative comparison between the demand for employment land – estimated in section 5 – and the reported supply, set out in section 6. The latter uses the figures presented in Figure 6.1 and therefore includes a small amount of land, less than 2ha, that Aspinall Verdi have suggested is no longer available for employment use. The deficit of supply compared to the uppermost estimates of demand should therefore be viewed as a minimum, where it is likely to be slightly larger and will continue to increase where land is taken up and developed.

Figure 7.1: Supply-Demand Balance



Source: Turley analysis, 2025

7.4 The above supply-demand balance analysis assumes that all the identified potential current supply capacity comes forward over the forecast period, with the size of any surplus reducing – and deficit increasing – if this does not materialise. This is important as it is evident from AV's market assessment of the supply that there are some sites where deliverability is identified as being potentially challenged by viability or other constraints. This reinforces the importance of identifying a supply which builds in sufficient flexibility to enable choice within the market. Building on the work undertaken by AV it is recommended that the Council considers the benefits of producing a delivery trajectory, particularly focusing on larger sites, to establish a clearer picture as to how the available supply could respond to market demand over five-year intervals of the plan period. This would require careful monitoring where it would be influenced by market demand factors as well as the progress of sites through the planning system.

7.5 It is also important to acknowledge that the supply of land is not distributed evenly between the three market areas, as shown in the earlier Table 6.8. The Council will need to consider the spatial distribution of supply in the context of its spatial strategy and the relationship with other infrastructure (including housing) as well as market demand within each area. This needs to recognise the requirements of businesses across the district to grow and expand whilst also acknowledging where interest in future investment, accounting for locational requirements, is concentrated.

7.6 Finally, the analysis of supply in section 6 highlighted that a relatively large number of sites within the identified supply, notably small in size, are classed as 'poor' or indeed

'very poor'. A total of 45 sites fall in these categories, representing almost 39% of all sites, albeit amounting to only around 10ha of employment land. These include ELSR sites and current PEAs, with 27 of the 74 current PEAs falling within these categories. The capacity of these sites to respond to market demand is evidently more limited and the simple supply-demand balance needs to be considered in this context as the Council identifies an appropriate supply of employment land through emerging planning policy. The role of PEAs in this regard is considered further in the final part of this section.

Meeting the needs of the modern economy

7.7 The NPPF includes a requirement to plan for development that meet the needs of a '*modern economy*'. As referenced in section 2, it 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"[65]

7.8 Consideration is therefore given below to those sectors of the modern economy which are of most relevance to Kirklees. This accounts for the review of the Council's economic strategies as well as the work undertaken to forecast future employment growth. Although specific sectors are discussed, this is not intended to preclude the potential advancement of other parts of the modern economy in Kirklees and it will be important for the Council to monitor its local economy to understand other investment interest and opportunities and consider its supply of employment land to accommodate emerging needs.

Advanced manufacturing and life sciences

7.9 The analysis in the preceding sections has highlighted the existence of manufacturing specialisms within Kirklees, noting the resilience of businesses and their potential to generate future employment opportunities, including those likely to be of greater economic value paying higher wages. This is expressly set out within the KIES which acknowledges existing specialisms in textiles, advanced manufacturing and precision engineering.

7.10 Similarly, the analysis has identified the potential to see future investment and growth in life science businesses within Kirklees, with this also specifically identified in the KIES. In this context the importance of the southern corridor of opportunity identified by WYCA is also noted, running as it does through Kirklees and being identified as a geographic area of focus that includes the University of Huddersfield's National Health Innovation Campus and significant development opportunities.

7.11 The above have been factored into the development of the adjusted REM forecast, described in section 5, which includes a positive adjustment for the manufacturing sector. Table 5.1 shows that this forecast, which also applies positive adjustments for three other sectors – some of which are considered below – generated elevated floorspace needs across all types of uses (i.e. offices, industrial and warehouses).

[65] MHCLG (December 2024) National Planning Policy Framework, paragraph 86c

7.12 The commercial requirements of businesses in the manufacturing life science sectors are likely to evolve but along with traditional requirements for industrial floorspace are also likely to generate needs for warehouse floorspace as well as other more niche requirements for laboratory space, which as noted above falls within the NPPF's suggestions of accommodating the modern economy. This recognises that some businesses operating in this part of Kirklees' modern economy will require a blend of floorspaces. The capacity to accommodate more bespoke requirements – like proximity to clusters of existing businesses in these sectors and key economic drivers such as the university and its existing facilities – will require careful consideration by the Council in its identification of an appropriate supply of employment land. Where appropriate this could include the identification of sites able to accommodate a campus style development, integrating industrial manufacturing space along with office-based flexible workspaces in a high-quality environment that would be attractive to new business investment as well as providing grow on space for existing businesses in Kirklees.

Logistics

7.13 The growing demand for logistics floorspace has been well-documented and has manifested physically across England in the growth of large-scale logistic hubs along the strategic road network. In the context of the modern economy, it is understood that the Government sees a continued and evolving demand for warehouses which increasingly integrate advanced robotics and AI.

7.14 Section 2 noted that in recent years work undertaken for the entire LCR has identified the importance and need for large sites close to the motorway network to respond to demand for larger logistics facilities.

7.15 Furthermore, as with the advanced manufacturing sector, the forecasts introduced in section 5 of this report made positive adjustments for the transport and storage sector to produce the adjusted REM scenario. This served to increase the forecast need for warehousing space, with this also reflected in an identified significant need for floorspace within the past take-up scenarios reflecting the recent demand for such space.

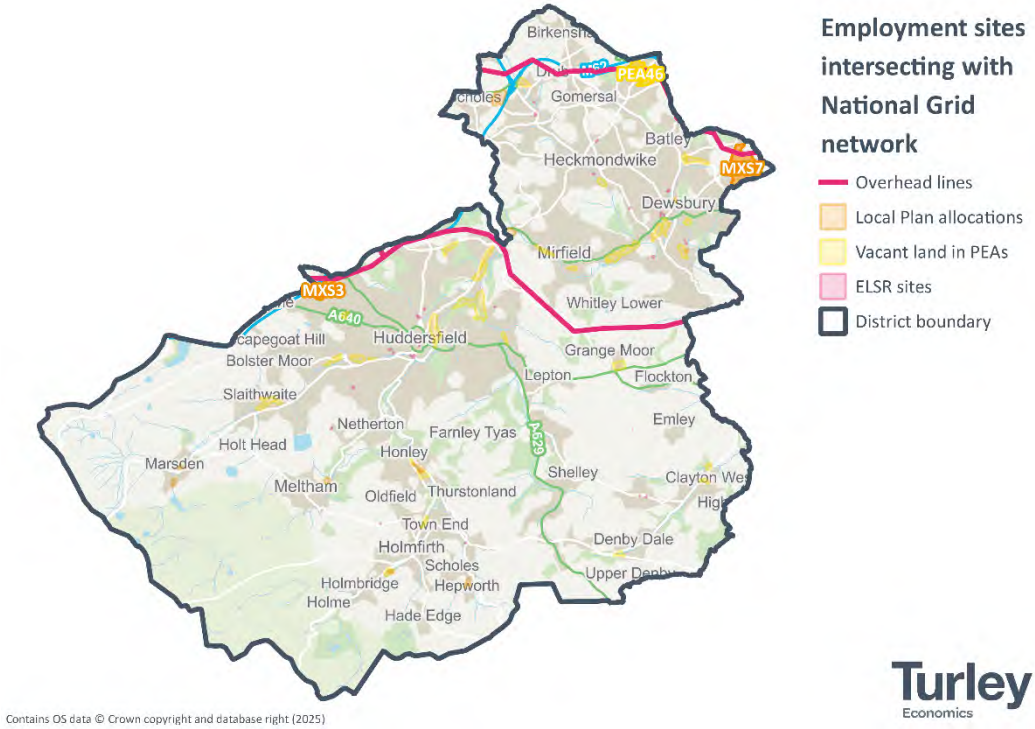
7.16 The analysis of existing supply reveals the limited number of large sites which are also close to and accessible from the motorway network. It is recommended, in line with the findings of the LCR work, that additional land is required that offers the potential to accommodate strategic scale logistics development along the motorway network in Kirklees, so as to respond to the identified demand and opportunities in this sector of the local economy. It is noted that the requirements of this sector are broad and not limited to large footprints and it is therefore important that sufficient choice and flexibility is also ensured for the full range of operator requirements.

Data centres / digital infrastructure / giga factories

7.17 It is acknowledged that this is a rapidly evolving sector of the economy and therefore the demand and requirements of the sector will continue to evolve.

7.18 Data centres – none of which are believed to currently exist in Kirklees[66] – are widely acknowledged to have significant power requirements which impact on where demand can be realised. This makes it relevant to consider how the location of the identified sites relates to the National Grid's electricity transmission system. Figure 7.2 shows that only three sites lie on the paths of the overhead lines that traverse Kirklees. Two are existing allocations – respectively offering 35ha of land east of Leeds Road in Chidswell (MXS7) and circa 6.3ha south of Lindley Moor Road to the west of the district – while the other is the PEA of Oakwell Industrial Estate (PEA46) which is believed to offer circa 6.3ha across various plots, each no more than 4.4ha in size. It is unclear whether even the largest of these three sites could accommodate the larger data centres that are now being brought forward elsewhere, but there is also scope for smaller so-called '*edge*' facilities that are '*located close to the end users to minimise latency*', which observers expect to become more important with the adoption of AI[67]. The limited number of suitable sites suggests that the Council should remain open to alternative sites in optimal locations that could meet any market demand for data centres.

Figure 7.2: Employment sites intersecting with the National Grid network



Source: Turley analysis

7.19 There are currently no gigafactories within Kirklees, with only one currently operational throughout the entirety of England in Sunderland. There are three further gigafactories known to be in the pipeline, these being located in Sunderland (a second battery plant adjacent to the existing facility), Somerset (Agratas are under construction with a 40 GWh gigafactory) and Coventry (planning permission secured for the West Midlands

[66] https://www.datacenters.com/locations/united-kingdom

[67] House of Commons Library (August 2025) Data centres: planning policy, sustainability, and resilience, p10-11

Gigafactory)[68]. The demand for gigafactories has often been aligned with the acceleration of the electrification of transport, with this representing an important determining factor behind this pipeline of schemes. Moving forward and recognising the wider application of related technologies and growing demand it is reasonable to assume that proximity to the automotive industry may not be an exclusive locational requirement. This recognises relationships to the renewables sector as well as potentially data centres. At this point in time, however, there is no specific locational demand identified as driving a requirement for such a facility in Kirklees. That is not to preclude a future need being identified.

A changing office market

7.20 It has been widely reported that the office market across the UK has experienced considerable change over recent years. The evolution of workspace strategies of businesses is being shaped by the acceleration and sustaining of hybrid-working as well as new disrupters including, but not limited to, the rise of AI.

7.21 Where there are important distinctions between the office markets of large cities and economies and smaller towns, such as the main office locations in Kirklees (Huddersfield and to a lesser extent Dewsbury), there are general trends of relevance which include a move away from a desire for rigid office leases and a growing requirement for flexible space that better aligns with workforce requirements[69]. There has similarly been an elevation in the expectations of businesses and their employees as to the experience that being in the office provides, with this an important consideration in attracting talent and improving productivity in a hybrid working model.

7.22 Looking specifically at Kirklees it is noted that the business survey found a strong orientation towards business expecting their employees to work from their premises. While responses are acknowledged to have been skewed towards manufacturing businesses rather than office-based employers, it is telling that nearly all (84%) stated that employees were expected to work from their premises every day. Only 9% said that staff were asked to spend a specific number of days working from the premises rather than at home, and 7% indicated that staff had the flexibility to decide where they wanted to work. None of the responses indicated that staff were able to exclusively work from home. This strongly implies that service-based businesses, as well as those operating in manufacturing or logistics, require a physical floorspace presence within the district and that this will continue over a reasonable time-horizon.

7.23 Whilst the above indicates a sustained demand, the analysis in section 4 – specifically at Figure 4.6 – showed a notable decline in the total amount of office space leased annually in Kirklees since 2018. Figure 4.7 also showed a general trend towards the leasing of smaller office units, with this likely to reflect the above evolving requirement for more flexible and efficiently used spaces. With regards spatial distinctions it is evident that Huddersfield is the main office location, accounting for slightly more than

[68] UK electric vehicle and battery production potential to 2040 – Faraday Report UK Gigafactory Outlook 2024

[69] A range of publications by leading commercial agents were available at the time of writing document changing requirements and expectations. One such example includes: The Evolving Landscape of the UK Office Market: Navigating a New Era

half of all office lettings since 2013, with its share also increasing in recent years. Whilst responsible for a notably smaller share South Kirklees was also seen to have been broadly increasing its share of office lettings. Interestingly where North Kirklees saw its share of lettings fall Figure 4.11 did show a unique trend towards larger office spaces being leased in this market area, potentially due to certain businesses still requiring out of town office premises with larger floorplates. This is though believed to account for only a relatively small proportion of the identified supply, as although AV deemed only 21 sites to be adjacent to a town, district or local centre[70] – all but two considered suitable for offices or a mix of uses – they collectively offered some 90.02ha of land, making them responsible for nearly two thirds (64%) of the overall supply.

7.24 Where the forecasting of future demand identifies that there will continue to be a requirement for 5.7-11.1ha of land to accommodate office uses – rising if assumed that a proportion require lower density office schemes – in reviewing the available supply only 2.71 ha of land was identified by AV as being specifically appropriate for offices. It is recognised that office floorspace could come forward on other sites identified as appropriate for a mix of uses but it is nonetheless recommended that the Council ensures that there is land responding to the differing needs of the sector, including:

- Premium flexible workspaces within Huddersfield as the main focus of office leasing activity. This also recognises the potential positive impacts on demand arising from the Transpennine Route Upgrade, referenced in section 2, which will potentially elevate the attractiveness of Huddersfield to complement the city-centre office markets of Leeds and Manchester to which connections will be improved;

- Smaller co-working / flexible office floorspaces within smaller employment centres (including but not limited to Batley, Cleckheaton, Holmfirth and Heckmondwike) and across the district to accommodate local and indigenous business demand. This should consider existing premises and potential conversions as well as opportunities to accommodate proportionate floorspace within residential development schemes; and

- Capacity to accommodate larger floorplate offices, notably within the North Kirklees market area, reflecting recent leasing activity and to ensure choice remains for those businesses requiring such space.

Meeting the needs of the rural economy

7.25 Throughout this report it has been acknowledged that Kirklees includes distinct spatial markets. The South Kirklees market area, in particular, is characterised by its predominantly rural character. Commercial floorspace and employment locations within this sub-area, whilst notably less than the other market areas, is also more disparate and less connected to the strategic transport network. This is characteristic of a more rural-based economy.

[70] Receiving the maximum score of five in the last of the criteria specified at **Appendix 3**

7.26 There is a national policy imperative to support the rural economy[71] and the businesses located in the rural parts of Kirklees represent an important component of the overall economy. It can though be observed from the business survey that of those looking to relocate in the next five years only 6% wanted to be within a rural location. Whilst modest this still indicates that there is a demand and need from businesses in rural parts of Kirklees. Planning policies will therefore need to continue to ensure that there is sufficient choice to enable future expansion and accommodate new businesses seeking rural premises.

7.27 The analysis in section 4 highlighted that South Kirklees had the lowest overall availability (3.3%) of commercial floorspace, with no available industrial space at the time the analysis was undertaken. This represents a potential challenge for businesses looking for new space.

7.28 While the earlier Table 6.8 indicates that the more rural South Kirklees has a greater number of employment sites than Huddersfield (37/28) they tend to be less than half as large, meaning that they collectively offer less land (26.26ha/41.90ha). AV also consider a greater proportion to be in remote locations away from services or residential areas, or not easily accessible with limited access to local services and regular public transport[72]. Some 86% also scored poorly in respect of public transport, being at least a ten minute walk from a main bus route, train station or cycle lanes, surpassing the equivalent figure for Kirklees (71%).

7.29 Noting the above the Council is encouraged to ensure that employment policies in its emerging Local Plan are sufficiently flexible to enable the identification of additional employment land which is identified as being required to accommodate the needs of existing rural businesses or which can attract investment and generate employment that provides sustainable opportunities for existing rural communities.

Priority Employment Areas

7.30 As explained in section 2 the adopted Local Plan included PEAs as part of the overall supply of available employment land. These provided circa 48 hectares of land at the point of adoption. The Plan was clear to recognise that these did not represent prime locations with regards to market demand and they were instead primarily formed of small parcels of land within existing employment areas.

7.31 As documented in section 6, AV have undertaken a comprehensive assessment of the current portfolio of PEAs, noting that the evolution of these employment areas and the Council's monitoring of vacant land has proceeded to account for new space as well as the take-up of land. This identified that there had been an increase in the supply of land within the PEAs, such that 74 individual sites collectively provided circa 63.45 ha of land at the time of assessment. It is understood that the classification of land by the Council through its active monitoring of existing employment areas will continue to

[71] Paragraphs 88 and 89 of NPPF (2024) establish support for a prosperous rural economy.

[72] 14% of sites in South Kirklees received a score of one or two in the last of the tests set out at Appendix 3, considering proximity to urban areas

impact on this figure where development will reduce the available supply and there is a possibility that sites are allocated within a future Local Plan.

7.32 It is important to acknowledge that the vast majority of PEAs continue to be small in size, with more than 80% of the sites being 1 ha or smaller. It is similarly important to recognise that a third (23) of the PEAs received a 'good' or 'very good' rating from AV, representing circa 47ha of supply. In contrast over a third (28) were scored as 'poor' or 'very poor'.

7.33 Furthermore, whilst AV have identified that in the vast majority of cases the sites do continue to offer the potential to accommodate additional floorspace it is also true that their location, access or size limits their attractiveness or capacity to accommodate the type of floorspace sought by the market.

7.34 While at least some of the PEAs could offer a potential source of supply to respond to identified needs, caution must be exercised in assuming that they can meaningfully contribute towards the identification of a market facing supply which can respond to immediate identified needs. The Council should continue to review the sites which are included within the PEAs potentially shortlisting those which are of a scale (larger than 1ha), score comparatively well (good or very good) and are not constrained by way of ownership (e.g. identified for business expansion purposes) to be included as part of the supply against which demand can be measured. This is not to suggest that those PEAs not included in this shortlist could not come forward and provide new floorspace, given that they could in many cases contribute for instance towards meeting the rural needs described above, but would rather ensure that the choice of available land is not exaggerated.

7.35 In progressing employment policies, it will be important that the Council continues to emphasise the need to make better use of existing employment areas, but in recognising the limitations of many of the PEAs, the potential for new employment land allocations should not be constrained.

Appendix 1: Business Survey Summary

Introduction and Local Economic Context

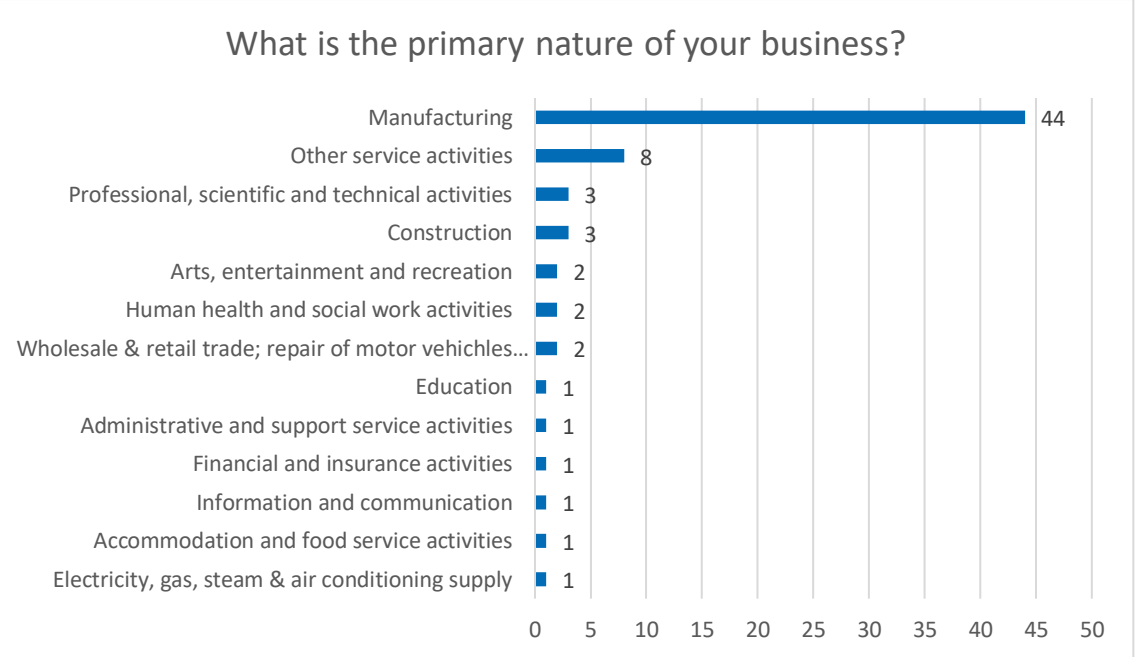
An online survey was created in October 2024 and distributed by the Council based on its records of local businesses.

The survey attracted responses from a range of businesses of different sizes, and in various sectors. There was a total of 70 completed responses, with the vast majority (48, or c.70%), solely operating from Kirklees. A further 21 businesses (30%) are based in multiple locations, but with their headquarters in Kirklees, and only one business operates in multiple locations, with their headquarters outside of the district.

The majority of businesses that responded (54, or 77%) are long established, having been in operation for more than ten years, with only one business operating for less than a year. A total of 11 businesses (16%) were running between five and ten years, and four businesses (6%) have been operating in Kirklees between one and five years.

The highest number of responses (44, or 63%) were received from manufacturing based businesses. This is followed by eight responses by 'other service activities' businesses (11%), and then those in the construction industries and professional, scientific and technical activities (both three responses, or 4%). In terms of those who responded to the survey, the vast majority were understood to hold senior positions within their respective businesses, being managers, directors, or owners.

Figure A1.1: Survey responses categorised by business sector

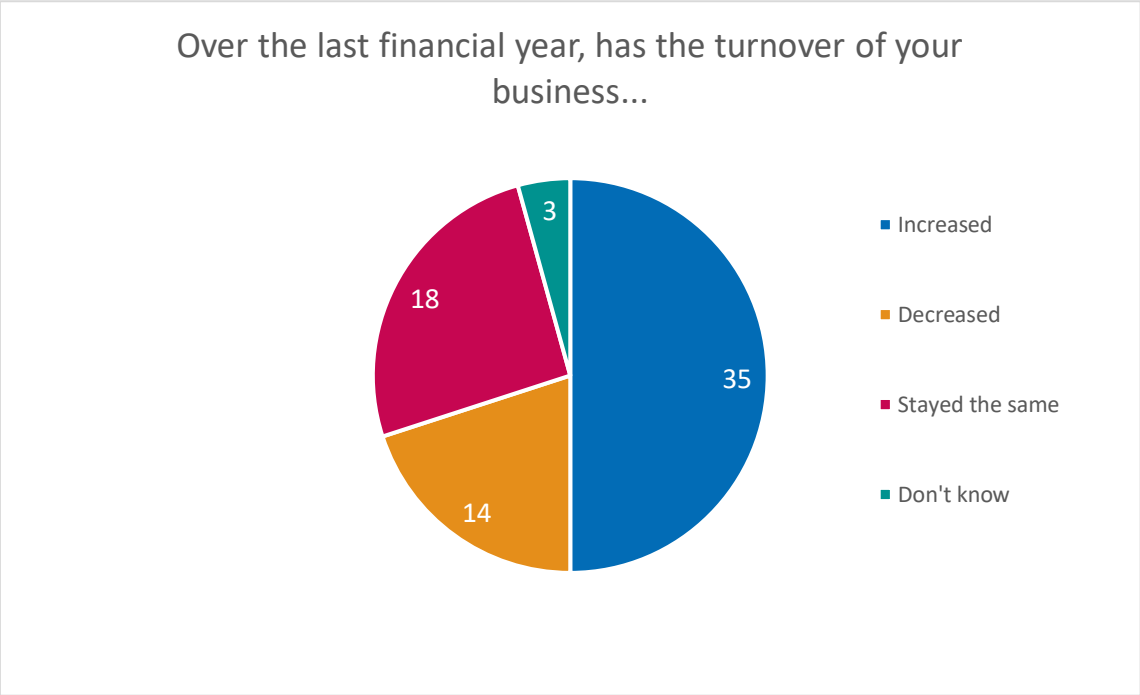


Performance

Current Performance

A number of businesses experienced challenges over the course of the last year, with 20% of respondents (14 businesses), reporting that their turnover had reduced, with a further 25% stating that this had remained the same (18 responses). However, others experienced growth, with 50% of businesses reporting that their turnover had increased over the course of the year (35 responses).

Figure A1.2: Reported change in turnover over the last 12 months

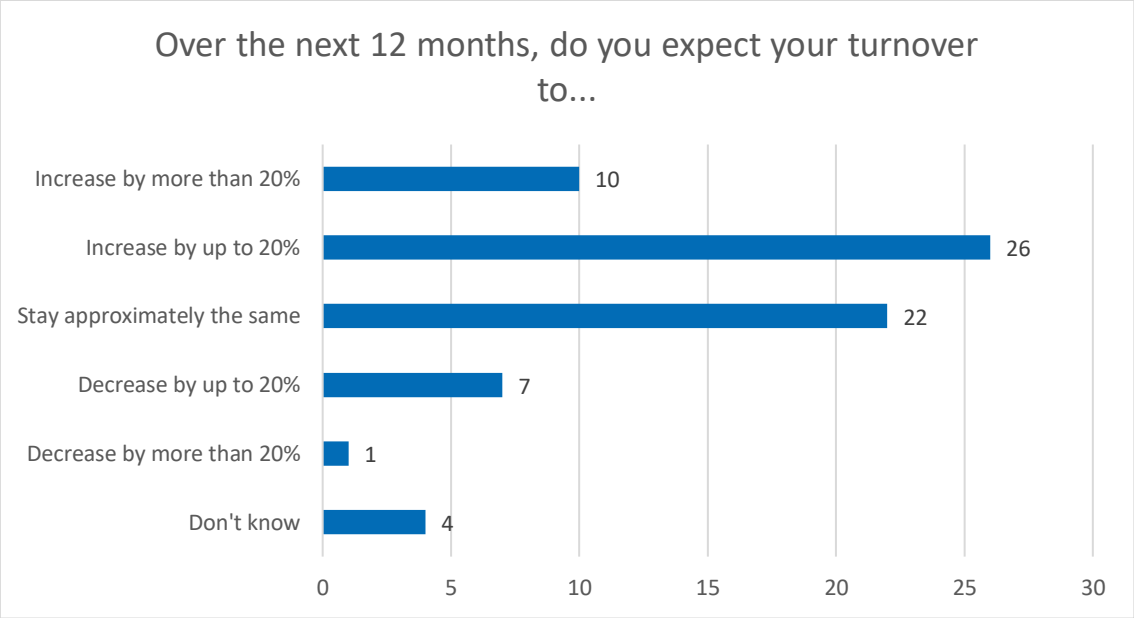


Future Financial Outlook

The majority of businesses indicated a positive outlook for the next year. Approximately 37% of businesses (26) indicated that they thought their business turnover would increase by up to 20%, with a further 14% (ten businesses) reporting that they anticipated this to rise by over 20%. A third of responses indicated that turnover would remain the same (22 businesses, or 31%).

There were some businesses who were more hesitant about future growth prospects, with 10% of responses (seven businesses) reporting that they thought this would reduce by up to 20%, and one business predicted that their turnover would reduce significantly over the next 12 months (by more than 20%).

Figure A1.3: Future turnover forecast over the next 12 months



Premises

Current Premises

Approximately a third of businesses operate from an industrial unit, with a further 27% running their operations from a factory, and 17% within an office in Kirklees. Smaller proportions stated that they operate from warehouse units (10%), serviced offices (3%) or retail units (1%).

In terms of the size of their premises, there was a fairly even distribution of responses across the different categories. There were slightly more responses from businesses in medium to large sized sites, with the most popular being between 201-500 sqm (19%), followed by 2,001-5,000 sqm (16%) and larger than 9,000 sqm (16%). This aligns with the fact that most businesses who responded to the survey are within the manufacturing sector.

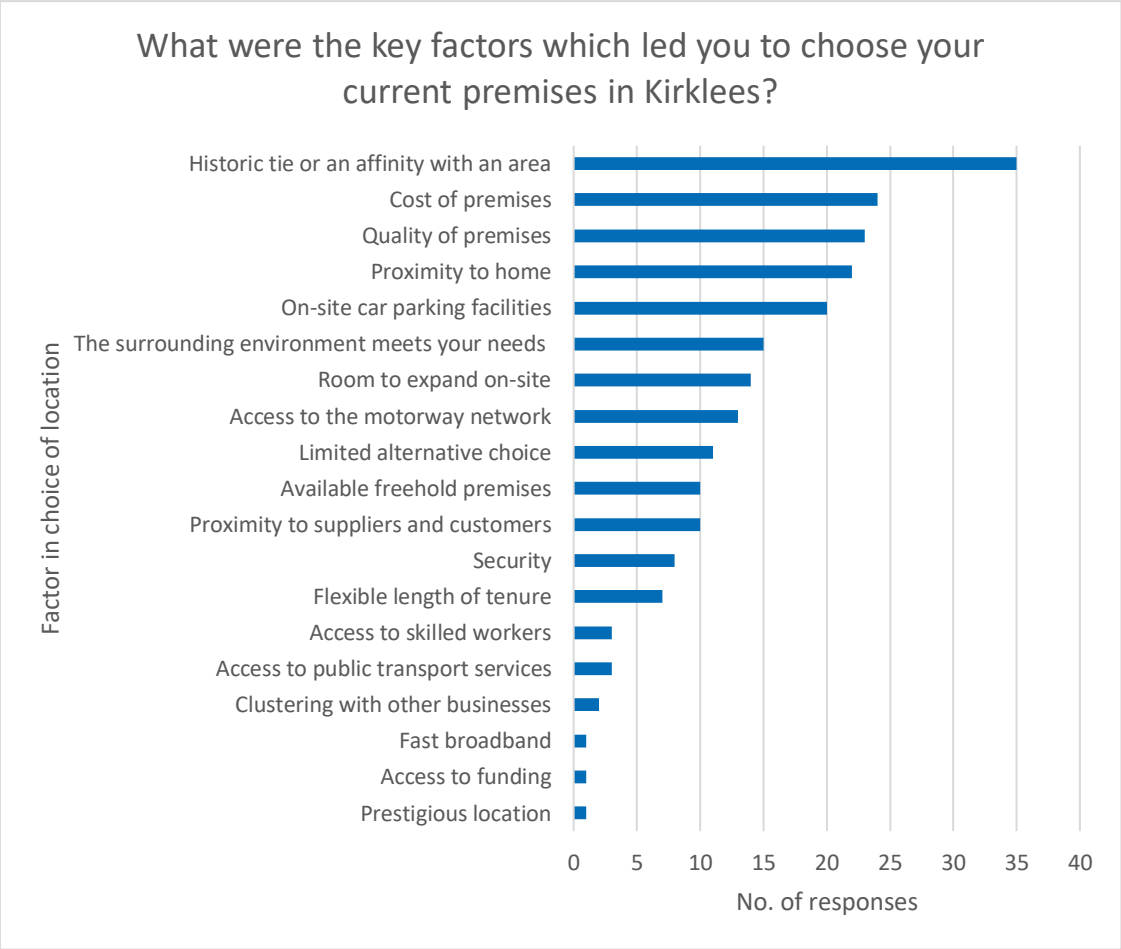
Table A1.1: Business premises size

Premise Size (sqm)	Under 100	101-200	201-500	501-1,000	1,001-2,000	2,001-5,000	5,001-9,000	Larger than 9,000
Number of responses	5 (7%)	7 (10%)	13 (19%)	9 (13%)	8 (11%)	11 (16%)	6 (8%)	11 (16%)

Over half of businesses were located on an industrial estate (51%), followed by 23% in another part of an urban area, and then 10% within an office business park. Fewer businesses were located in a town centre (6%) and only 1% operated from home.

The key factors which led to businesses choosing their current premises in Kirklees were reported to be historic tie or an affinity to the area (50% of respondents selected this option), cost (34%), quality (33%) and proximity to home (31%).

Figure A1.4: Key factors in choice of location



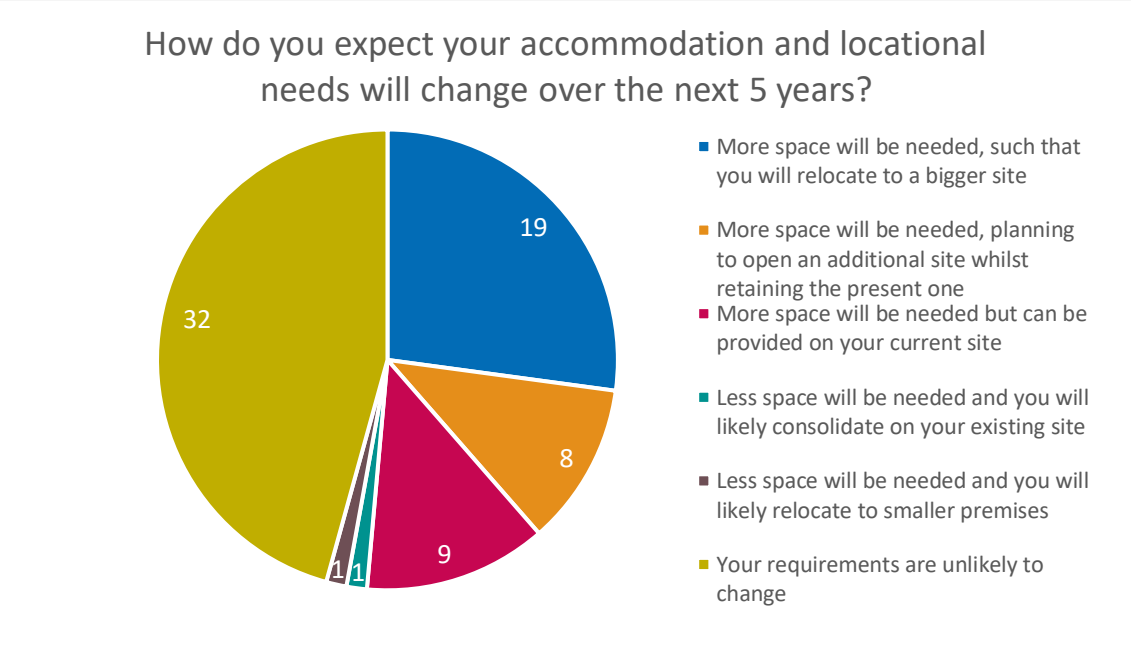
The vast majority of respondents were satisfied with their current accommodation, with 67% (47 businesses) agreeing that these facilities met their business needs. Of the 26% (or 18 businesses) which were dissatisfied, the main reasons cited were that the premises were not large enough (26%), there was a lack of expansion space (21%) and insufficient car parking (21%). Other popular responses were that the current premises had inflexible layout/design and that they felt there was an insufficient supply of skilled labour within the proximity (both 14%).

Future Premises Requirements

When asked how they expected accommodation and locational needs to change over the next five years, most foresaw that their requirements were unlikely to change (46%). However, just over a quarter anticipated needing to relocate to a bigger site as more space would be required (27%), others thought more space would be needed, but this could be provided on their existing site (13%) and some required more space, but were planning to open an additional site, whilst retaining their existing one (11%).

Only two businesses thought they would need less space, with one indicating they were likely to consolidate operations on the existing site, and the other stating they expected to relocate to a smaller premises. No responses indicated that they would forego their commercial site and encourage employees to work from home.

Figure A1.5: Future business premises requirements



In terms of the specific requirements for space, there was a range of interest, the most popular being between 2,001-5,000 sqm (13%), followed by premises of 501-1,000 sqm (9%), then sites of 1,001-2,000 sqm (7%). Five businesses also expected to require larger premises, of over 9,000 sqm in the next five years.

Of those who were unsure that their future needs could be facilitated within the district, the most common concerns were that there was a lack of sites with suitable expansion land (14%), or there were no premises currently available which met their requirements (also 14%). Other businesses felt that there was poor access to public transport services (9%), the sites offered were poor value for money (9%), there were no 'oven-ready' sites (7%) or concerns that their future accommodation would be disconnected from skilled labour supply (7%).

In terms of specific future requirements for their business, the most common requests raised were being in close proximity to motorways, as well as being easily accessible for both clients and employees.

Future Premises Location

Of those looking to relocate to a new site, in terms of the type of space which was anticipated to be required over the next five years, most respondents (23%) were looking for industrial units, followed by factory facilities (9%) and then 6% stated that office based accommodation would meet their requirements.

Most of these businesses looking to relocate in the next five years stated that they would prefer to be located on an industrial estate (26%), with only 6% wanting to be within a rural

location, 4% at another urban location, 3% on a business park and only 1% within a town centre.

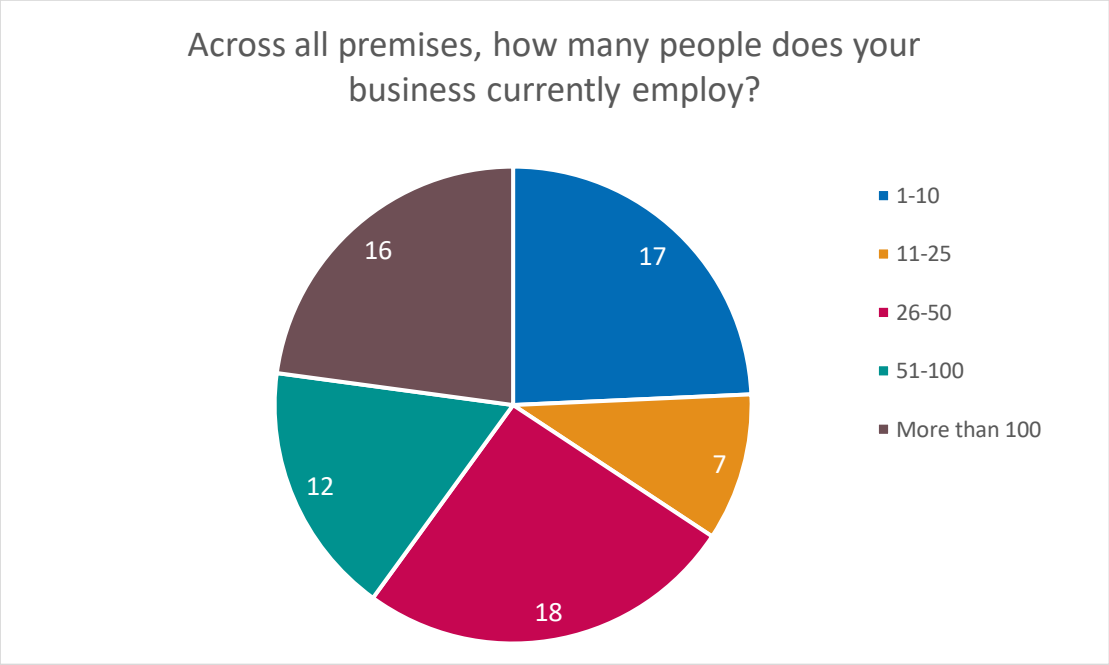
Half of the businesses surveyed (35, or 50%) felt their future accommodation needs could be facilitated within the district, agreeing that there is a sufficient supply of sites available locally. Only 4 businesses (6%) disagreed with this, suggesting that they would need to look outside of the Local Authority boundary to meet their needs. Just over a third of respondents (31 businesses, or 34%) indicated that they didn't know, or the question was not applicable to their needs.

Employees

Current workforce

A total of 17 responses (24%) stated that their business employed between 1-10 employees across all premises (a micro business). A further 7 (10%) had between 11-25 employees and approximately a quarter (18, or 26%) employed between 26-50 people (defined as a small business). A further 12 (17%) had between 51-100 employees and 16 (23%) had a workforce of over 100 (classified as medium-large businesses)[73].

Figure A1.6: Number of employees per organisation



When asked how many people their Kirklees based business employs, the majority (29%), reported between 1-10 people. A further 9% employed 11-25 people within Kirklees and 26% employed between 26-50 people. There are also a number of larger businesses, with 20% reporting that they had between 51-100 employees on their Kirklees site and 17% had more than 100 employees locally.

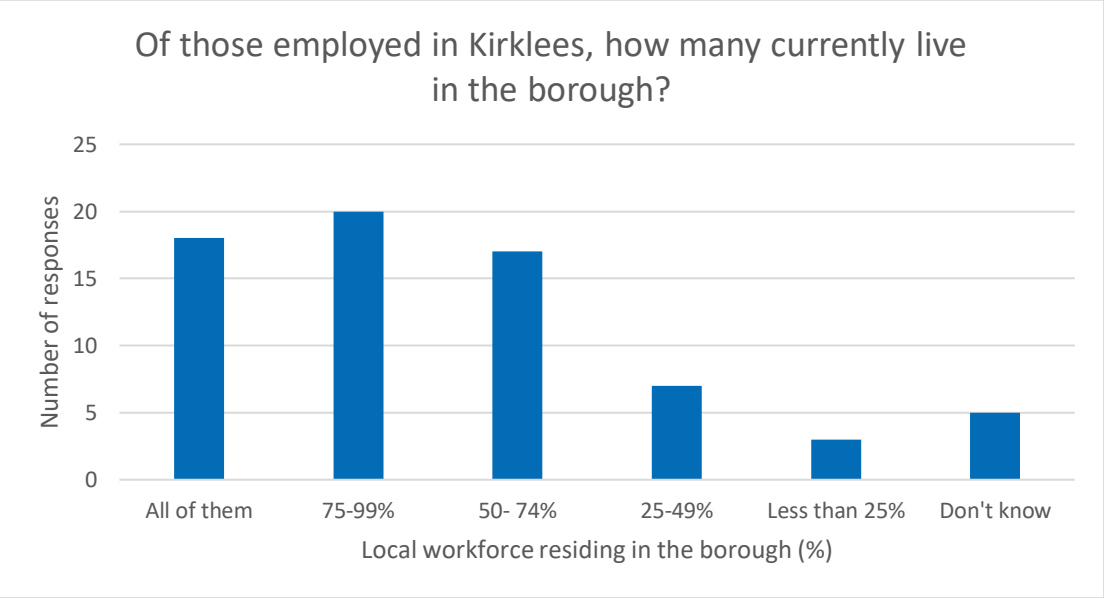
[73] Micro enterprises are defined as being those with fewer than 10 employees), Small enterprises (10-49 employees), Medium sized enterprises (50-249 employees), and large enterprises are those with more than 250 employees.

Nearly half of businesses (47%) reported that their workforce had grown within the last year and 36% of respondents stated that their workforce had remained the same. Approximately 17% of respondents experienced a reduction in the number of employees over the last 12 months.

In terms of positions which have been difficult to recruit, many businesses stated that they had struggled to fill more technical or specialist roles, such as engineers, welders or technicians.

The majority of businesses also predominately had a local workforce. Of those who responded, 26% stated that their entire workforce was made up of residents who live within Kirklees. A further 29% said that at least three quarters of their workforce were residents of the district and approximately a quarter fed back that between half and three quarters of their employees were local. Only 10% of responses stated that between a quarter and half of their employees were based in Kirklees, and only 4% reported that their workforce was made up of less than 25% local residents.

Figure A1.7: Proportion of the local workforce residing in the district



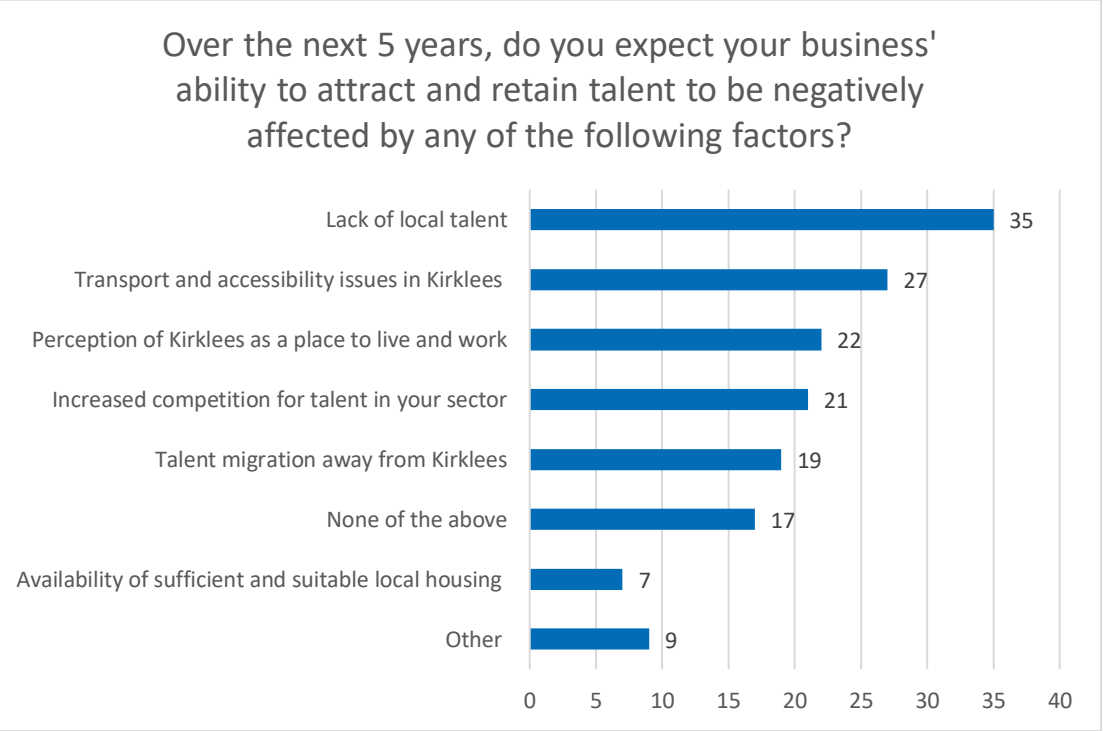
Future workforce requirements

Over the course of the next five years, 43% of businesses expected their workforce to increase by up to 20%, with 15% anticipating their workforce to grow by over 20%. Just under a third of respondents thought their number of employees would remain the same (30%), with only 1% of businesses foreseeing that their workforce size would reduce over the coming years.

Following restrictions imposed as a result of the COVID-19 pandemic, many businesses asked employees to work from home, and since, a pattern of virtual working has been adopted by many businesses across the country. However, when asked where employees work from, nearly all (84%) stated that employees were expected to work from their premises every day. Only 9% said that staff were asked to spend a specific number of days working from the premises vs home, and 7% feedback that staff had the flexibility to decide where they wanted to work. None of the responses indicated that staff were able to exclusively work from home.

When asked which factors were perceived to pose the greatest risk for attracting and retaining talent over the next five years, half of respondents (50%) indicated that they felt this would most likely be caused by a perceived lack of local talent to meet their needs. This was followed by transport and accessibility issues within the district (39%), the perception of Kirklees as a place to live and work (31%) and the increased competition for workforce talent within their respective sector (30%). Others indicated that this was likely to be caused by talent migration away from Kirklees (27%) and availability of sufficient and suitable local housing (10%).

Figure A1.8: Factors affecting future recruitment and retainment



Business support requests

When asked how Kirklees Council could support businesses in the future to find new accommodation facilities, the most common responses were:

- Financial support, such as funding support/grants and a review of business rates requirements;
- Provision of advice, such as raising awareness of local sites on offer (both premises or land), assisting with the planning process, or assistance with recruiting apprentices;
- Protecting more land within the Local Plan process for employment use; and
- Improving town centre areas by encouraging investment/improved public realm;

Summary

Overall, most businesses expressed a positive opinion about their operations within Kirklees, the key points being:

- Most businesses within the manufacturing sector and are well established locally, being in operation for more than ten years;
- Half of those who responded experienced growth in their turnover over the course of the last year. However, approximately 20% experienced a reduction, and turnover remained the same for a quarter of businesses. Over half of businesses thought that their turnover would increase again over the next 12 months;
- A third of businesses who responded to survey currently operate from an industrial unit and over a quarter run their operations from a factory;
- The key factors which led to businesses choosing their current premises were their historic tie to the area, cost and quality of their sites as well as proximity to home;
- Nearly three quarters of businesses were satisfied with their current premises and agreed that this met their needs. Most didn't expect to need to move over the next five years, but for those who did, they expected to need to relocate to a larger site, most of which felt could be facilitated within Kirklees district. Only two business anticipated downsizing to a smaller premises;
- The most popular requests for future sites were within industrial estates;
- Most businesses reported that their workforce had grown within the last year (46%), the majority of which were residents of Kirklees district. Over half of those surveyed expected their workforce to grow further over the next five years;
- Nearly all businesses surveyed expected their employees to work from their premises everyday, rather than working from home.

Appendix 2: Sector to Use Class Matrix

Sector	Offices	Industrial	Warehousing	Non-B
Agriculture etc	0%	0%	0%	100%
Mining & quarrying	0%	0%	0%	100%
Manufacturing	0%	90%	10%	0%
Electricity, gas & water	0%	0%	0%	100%
Construction	0%	0%	5%	95%
Distribution	0%	0%	20%	80%
Transport & storage	0%	0%	75%	25%
Accommodation & food services	0%	0%	0%	100%
Information & communications	80%	0%	0%	20%
Financial & business services	90%	0%	0%	10%
Government services	25%	0%	0%	75%
Other services	0%	0%	0%	100%

Appendix 3: Aspinall Verdi Site Assessment Criteria

Market signals	Score
Development opportunities	
Space for expansion / new buildings without having to re-develop / demolish existing buildings	5
Capacity to significantly expand / extend / intensify existing buildings on site as they are still appropriate / suitable for the site	4
Area(s)/site(s) with existing building(s) that have the potential to be redeveloped	3
Limited space for minor extension(s) to existing buildings	2
No space to expand / opportunity sites within / adjacent to the site	1
Nature of existing occupiers	
High level of national and international companies	3
Limited presence of national and international companies	2
No national or international companies, exclusively Kirklees based	1
Clustering effect	
A large cluster of high tech / value businesses providing for specific niche or sector in the market	4
A large cluster of low tech / value businesses	3
A small cluster of related businesses	2
The site is a single building with no clustering effect	1
Vacancy levels	
90 - 100% occupancy	5
80 - 90% occupancy	4
60 - 80% occupancy	3
40 - 60% occupancy	2
Less than 40% occupancy	1
Less than 25% occupancy	0
Physical signals	Score
Prominence	
Visible from the major road network	5
Visible site on a main road or prominent estate	4
On a main road or prominent estate, but concealed away from view	3

Market signals	Score
Visible from a minor road or estate	2
Accessible from a residential road with no visible entrance	1
External environment	
Excellent quality environment	5
High quality environment	4
Average quality environment	3
Below average quality environment	2
Poor quality environment	1
Sustainability signals	Score
Strategic access	
Within 1 km of a strategic road junction	5
Within 2 km of a strategic road junction	4
Within 3 km of a strategic road junction	3
Over 3 km from junction or access and / or through constrained / local roads / or through city/town centre or residential areas	2
Over 5 km from junction or access and / or through constrained / local roads / or through city/town centre or residential areas	1
Local access	
Direct access to strategic road network	5
Easy access to strategic road network with no congestion hotspots on route	4
Site only has one congestion hotspot on route to the strategic road network	3
Site has multiple congestion hotspots on route to strategic road network	2
The site is either: directly adjacent to a congestion hotspot and has multiple hotspots on route to strategic road network or; its main access route(s) are unsuitable for the type of traffic it takes and has multiple congestion hotspots on route to strategic road network	1
Public transport	
Within a 3 min walk of main bus route, train station or cycle lanes	4
Within a 10 min walk of main bus route, train station or cycle lanes	3
Greater than a 10 min walk of main bus route, train station or cycle lanes	2
No services within close proximity	1
Proximity to urban areas and access to labour and services	
Adjacent to a city, town, district or local centre; good pedestrian access residential areas and regular public transport	5

Market signals	Score
Near to a city, town, district or local centre; good pedestrian access residential areas and regular public transport	4
Easy site access to a city, town, district or local centre; and with reasonable access to local services and regular public transport	3
City, town, district or local centre is not easily accessible with limited access to local services and regular public transport	2
Remote site, no services or residential areas in the vicinity	1

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