

City of Bradford MDC
**Employment Land Review:
Addendum 2026**
Final

Final | 14th September 2026



Edge Economics Ltd
Courtwood House
Silver Street Head
Sheffield S1 2DD
United Kingdom

www.economiccase.com

Contents

1	Introduction	3
2	Economic Update	4
3	Demand: Updated Employment Forecasts	11
4	Demand: Updated Land Requirement	15
5	Demand-Supply Balance	21
6	Conclusions	24

1 Introduction

1.1 Purpose of addendum

1.1.1 This 2026 addendum document provides additional and updated analysis to the Employment Growth Paper (EGP, February 2024) and Employment Land Review (ELR, March 2024). It can be read as an up-to-date standalone document on employment land need in Bradford. The EGP and ELR can however be referred to for further detail on the work previously undertaken.

1.1.2 In particular, the addendum:

- Considers the economic context in 2026;
- Utilises the latest econometric forecasts and historic take-up figures to estimate an updated land requirement;
- Presents results reflecting the updated plan period (2025-2043); and
- Provides a more detailed breakdown of E(g) requirements.

1.1.3 The analysis forms part of Bradford's new Local Plan evidence base.

1.2 Structure of this paper

1.2.1 The remainder of this paper is structured as follows:

- Section 2 – provides an economic update, both in terms of the national macro-outlook and local economic development in Bradford;
- Section 3 – explores the updated demand picture, utilising the latest econometric forecasts and historic take-up data; and
- Section 4 – outlines an updated estimate of the land requirement on the basis of the new forecasts and updated plan period;
- Section 5 – summarises the updated employment land demand-supply balance; and
- Section 6 – draws out the key conclusions.

2 Economic Update

2.1 National outlook

UK macroeconomic environment

2.1.1 The current UK macroeconomic environment is characterised by a combination of low economic growth and elevated inflation. Ongoing geopolitical tensions represent an element of increased risk, particularly in terms of trade policy uncertainty and energy market volatility linked to conflict in the Middle East.

2.1.2 The latest UK macroeconomic outlook analysis published by the Bank of England highlights rises in inflation as global energy prices and supply shocks filter through¹. Inflation currently sits well above the target of 2%. Economic growth is muted, with estimates being in the range of 0.1% to 0.2% per quarter. Labour demand is weak and the unemployment rate has been trending upwards (with the latest figure being 4.9%). Within the labour market, there is a significantly higher rate of unemployment in younger age groups – being 16.2% for those aged 16-24.

Political change and reindustrialisation policy

2.1.3 There is significant political change occurring at the UK level.

2.1.4 At the time of writing, Andy Burnham has recently become Prime Minister. His economic vision is centred on fiscal devolution with the transferring of spending powers and budgets out of Whitehall to local mayors and councils. This means that regional majors and local authorities are likely to receive consolidated long-term budgets rather than having to compete for central government funding pots.

2.1.5 The appointment of John Healey as Chancellor is expected to bring an emphasis on local growth and public control with northern hubs likely to see fast-tracked funding for regional transport networks, local bus/rail fare cuts and housing projects. In terms of industrial sectors, this appointment may be positive for activity related to defence, technology and manufacturing. The Chancellor will also be continuing to meet established fiscal Treasury rules.

2.1.6 A full detailed 10-year strategy is expected to be published later in 2026. A key part of the plan is the establishment of a 'No 10 for the North' department based in Manchester to execute a rebalancing of power away from Whitehall. Further economic policy directions are likely to be set out in the October 2026 budget.

2.1.7 This change of national leadership is potentially significant for Bradford's economic prospects. Reindustrialisation policy seeks to rebuild the UK's manufacturing capacity and move the country away from its heavy over-reliance on the financial and service sectors². Within this is a focus on high-

¹ Bank of England (2026), Monetary Policy Report – July 2026, 30 July 2026.

Bank of England – Monetary Policy Report, July 2026 and Office for National Statistics (2026), Labour market overview, UK: August 2026, 18 August 2026; House of Commons Library (2026), Unemployment in the UK: Economic indicators, 18 August 2026.

² PM statement to House of Commons: 1st September 2026, <https://www.gov.uk/government/speeches/pm-statement-to-the-house-of-commons-1-september-2026>

tech manufacturing, clean energy and local economic partnerships. Bradford’s well established manufacturing base and position in the North mean it is well placed to benefit from this shift in policy.

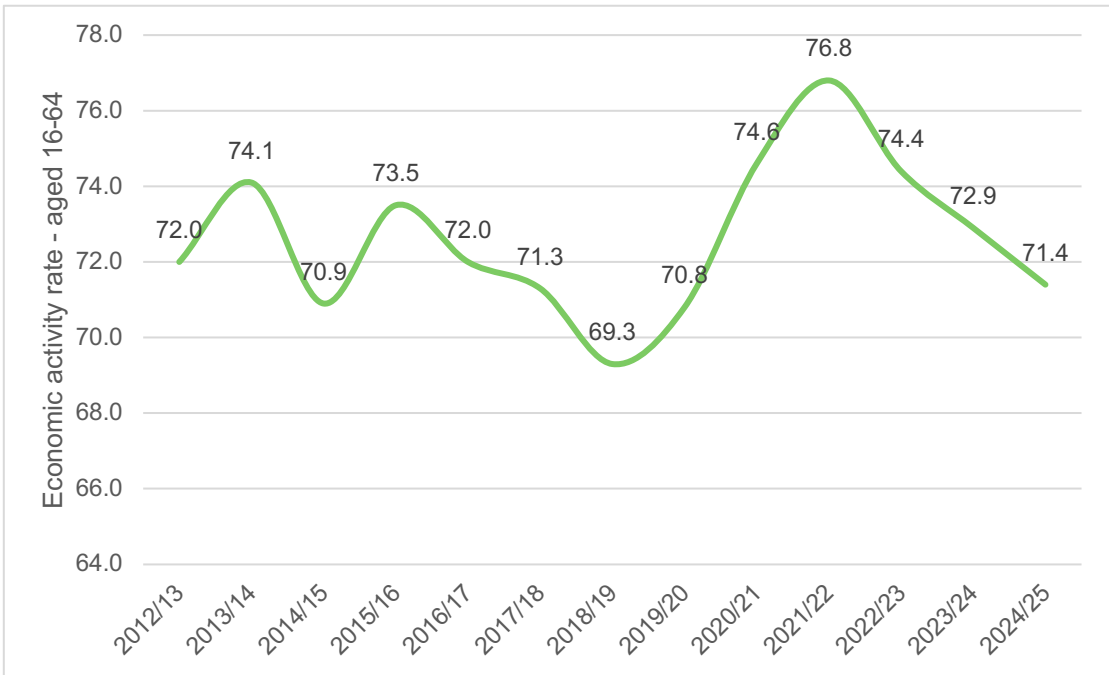
2.1.8 Noting some of the challenges in the youth employment market, Government has also set out measures to enable young people to develop careers through an increased focus upon technical education, training and apprenticeships³.

2.2 Local Economic performance – update

Economic activity rate (aged 16-64)

2.2.1 In the year to March 2025, Bradford had an economic activity rate of 71.4. Over the period 2012/23-2024/25, there have been fluctuations (with a low point in 2018/19) but the rate in 2024/25 is broadly the same as 2012/13 (71.4 in 2024/25, 72.0 in 2012/13). These rates remain lower than the national figures of 77.1% (2012/13) and 78.8% (2024/25). Information is detailed further within **Figure 2.1** below.

Figure 2.1: Economic activity 2012/13-2024/25, Bradford



Source: Annual Population Survey (APS), ONS.

Note – Years refer to Apr-Mar periods. Residence-based figures.

³ <https://www.gov.uk/government/news/government-invests-in-young-people-with-more-opportunities-close-to-home>

Headline employment

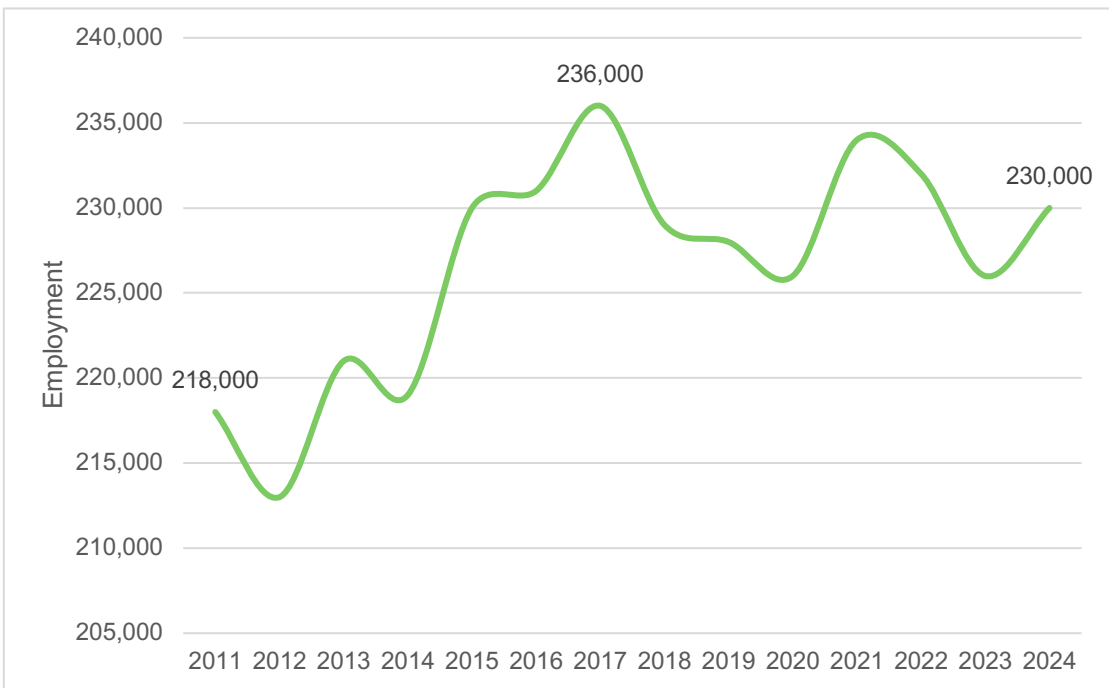
Total employment (from Jobs Density data)

2.2.2 The Total Jobs measure from Jobs Density data comprises employee jobs, self-employed, government-supported trainees and HM Forces. The number of jobs in an area is composed of jobs done by residents (of any age) and jobs done by workers (of any age) who commute into the area.

2.2.3 This shows in **Figure 2.2** that for the period 2011-2024, total employment in Bradford increased by around 5.5% (+12,000 jobs). A change of trend occurred in the period 2017-20. It is notable that in the final year of data available (2023-2024) there was an expansion in employment of around 1.8% (+4,000 jobs) from the previous year. Over the same period for England as a whole, total employment increased by 18.3%.

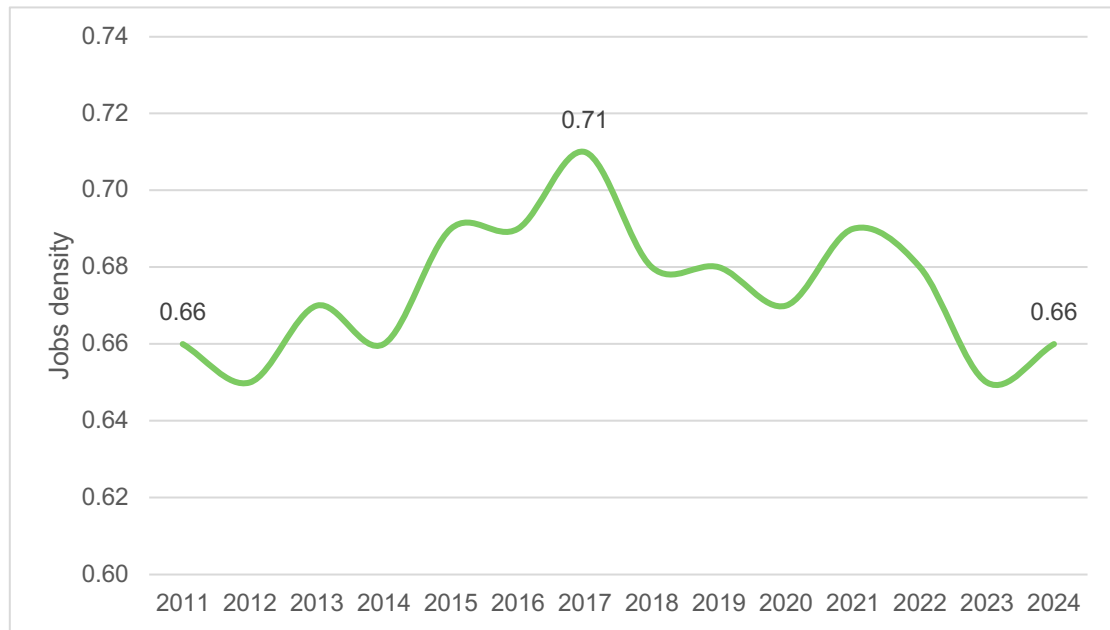
2.2.4 The Jobs Density measure is the number of jobs per resident aged 16-64. For example, a job density of 1.0 would mean that there is one job for every resident of working age. This also shows a change in trend at 2017 (0.71) and was broadly at the same level in 2024 as in 2011 (0.66). Increasing Jobs Density through more workplace job is a key factor in supporting higher levels of GVA and in turn GVA per head. Data for England indicates a job density of 0.78 in 2011 and 0.86 in 2024 – significantly above Bradford job density figures.

Figure 2.2: Total employment 2011-2024, Bradford



Source: ONS Jobs Density Statistics.

Figure 2.3: Jobs density 2011-2024, Bradford



Source: ONS Jobs Density Statistics.

2.3 City and Physical Change

2.3.1 The completion of the One City Park development in December 2023 is a key milestone in improving the quality of office space in Bradford City Centre. PwC is now an anchor tenant, helping to improve the perception of Bradford as an office location. This may contribute to supporting growth aspirations in terms of jobs growth in the Professional Services and related sectors.

2.3.2 The City Centre has also witnessed investment in the nearby new Norfolk Gardens as part of major infrastructure improvements, including active travel and a hybrid planning approval granted for City Village to help transform former retail space in the heart of the city for residential and supporting uses.

2.4 Further Regeneration and city transformation plans

2.4.1 There have been significant developments in regeneration plans and local economic policy since the EGP and ELR. In particular, these include:

- Bradford 2025-2035: Regeneration & Growth Plan;
- Southern Gateway Masterplan
- West Yorkshire Mass Transit Spatial Development Framework; and
- Integrated planning strategy for West Yorkshire.

Bradford Regeneration & Growth Plan 2025-2035

2.4.2 The Growth Plan sets out an agenda for how Bradford will grow over the next decade. It is structured around four drivers (culture, transport, skills and regeneration pipeline) and identifies seven growth accelerators:

- Southern Gateway;
- Bradford Rail;
- Mass Transit;
- City Village;
- Transforming Towns;
- Airedale Hospital; and
- Bradford Low Carbon Hydrogen.

2.4.3 These seven major initiatives sit at the core of the Growth Plan, driving change at faster pace and scale. Southern Gateway is being progressed to support long-term city centre growth, with City Village moving into delivery and pioneering a new city centre living offer. Plans for a new Bradford city-centre rail station (first phase of NPR) and a modern mass transit system (£2bn tram system linking Bradford and Leeds) are advancing to strengthen connections across the District. Investment is unlocking Bradford's towns, Airedale Hospital is progressing as a major £1bn health and innovation campus, and Bradford Low Carbon Hydrogen is driving clean energy and advanced manufacturing.

2.4.4 The Growth Plan sets out an ambition for Bradford to close the gap in performance with other UK Core Cities, in particular by growing the business base and improving productivity. It identifies both existing key sectors and opportunity sectors.

2.4.5 The three key sectors are:

- Advanced Manufacturing and Materials;
- Financial and Professional Services; and
- Food and Drink.

2.4.6 The opportunity sectors are:

- Digital and Technology;
- Culture and Creative Industries;

2.4.7 The following other important sectors are identified:

- Life Sciences;
- Green Economy; and
- Transport and Logistics.

2.4.8 Overall, the Growth Plan sets out an ambitious agenda for change and accelerating growth in Bradford. It seeks to build a knowledge-based, export-led economy powered by innovation and enterprise.

Southern Gateway Masterplan

2.4.9 Southern Gateway is a 126-hectare site located to the south of Bradford City Centre. It is one of the UK's largest regeneration sites. A master planning exercise is underway to progress enabling work to support future delivery, aligned with rail investment and Mass transit.

2.4.10 Southern Gateway seeks to open up space for new homes, local businesses, community facilities and green spaces - creating the conditions for growth. At its core are two landmark transport investments (i) a new city centre rail station as part of the Bradford Rail Programme and (ii) the Bradford to Leeds tram scheme through West Yorkshire Mass Transit. It will support delivery of the District's core priorities – supporting people into opportunity, raising productivity and creating high-quality spaces.

2.4.11 In total, it is estimated that Southern Gateway will contribute 5,000 new homes, 23,000 jobs, £1.12bn in annual GVA uplift and 440,000 sqm of new office space. It is however a large project with four phases of growth and accordingly it will take a number of years (into 2060's) for full delivery and economic benefits to accrue. Over time, the delivery of Southern Gateway may require the relocation of existing businesses. As well as enabling a more efficient use of land, this may provide an opportunity to improve the quality of business space for those businesses.

West Yorkshire Mass Transit Spatial Development Framework (SDF)

2.4.12 The West Yorkshire Combined Authority (the Combined Authority), working with partners, is proposing a transformative Mass Transit network to deliver improved connectivity, economic growth, and housing growth across the region. This has culminated in the development of a joint Development Plan Document (DPD).

2.4.13 The SDF DPD features a vision with a series of supporting strategic objectives together with policies on the principle of support for Mass Transit; delivering mass transit within an integrated transport network; promoting transit-orientated development; high-quality placemaking and design; sustainable design and climate change / resilience; enhancing the natural environment; safeguarding mass transit routes and sites and supporting delivery through local plans. At the time of drafting the SDF is at the formal Regulation 19 consultation stage.

Integrated planning strategy for West Yorkshire

2.4.14 The West Yorkshire Combined Authority (WYCA), in partnership with the region's five local authorities, is also preparing an integrated planning strategy. This comprises of two components: (i) the Spatial Development Strategy (SDS) and (ii) the West Yorkshire Infrastructure Strategy (IS).

2.4.15 Within the early-stage West Yorkshire planning framework, Bradford serves as a primary regional growth hub, integrating its city-wide regeneration strategy with the overarching SDS and the new Mass Transit system.

2.5 Implications

2.5.1 Planning for employment land in Bradford must balance the challenging UK economic outlook with recent stronger employment growth and plans for transformational growth at the local level, plus help tackle engrained local economic challenges.

2.5.2 The delivery of major transport infrastructure investments and city-centre transformation through Southern Gateway will be influential in Bradford's future economic performance – including development of its business base, productivity and job creation.

2.5.3 The implication is a significant period of transition – in terms of the shape of employment and housing delivery and in the industrial base. In planning for employment land, it will be crucial to consider the types of sectoral growth that will be supported through these urban transformation plans (as identified in the Bradford Growth Plan).

2.5.4 In terms of office space, a clear post-covid era has now become established at a national level. There are less losses of office space occurring and a trend toward premium grade floorspace in sustainable locations. There is also a demand for more flexible workspace, with easy in and out terms.

2.5.5 The emphasis of national economic policy also means allowing for growth in R&D and industrial uses is important, the latter being supported through a policy of reindustrialisation and the geopolitical environment.

3 Demand: Updated Employment Forecasts

3.1 Overview

3.1.1 This section updates the employment forecasts using the same approach as applied in the ELR.

3.2 ELR (March 2024) forecast and scenarios

3.2.1 The ELR (March 2024) utilised the Experian REM December 2022 econometric forecast of employment to consider the plan period at the time of the reporting of 2023-2041. In order to consider a range of potential outcomes for growth, two higher growth scenarios were also analysed. In line with the findings of the EGP (February 2024), additional growth was concentrated in the Health, Information & Communications, Professional, Scientific & Technical and Transport & Storage sectors.

3.2.2 For easy reference, **Table 3.1** sets out these scenarios and their respective implications for annual average employment change in the plan period 2023-2041. The mid-point of the two higher growth scenarios is also illustrated.

Table 3.1: Scenarios based on econometric forecasts (ELR, March 2024)

Scenario	Change in total employment, 2023-2041
	Annual average
Baseline forecast (REM)	1,111
Higher growth scenario REM+ (Lower)	1,346
Mid-point - Higher Growth Scenario	1,514
Higher growth scenario REM+ (Upper)	1,682

Note – REM refers to the REM forecast (December 2022). Total workforce jobs.

3.3 Updated forecast and scenario

3.3.1 The latest REM release (February 2025) has since been analysed for the new plan period (2025-2043). This release is consistent with the Experian November 2024 UK macro forecast and provides a new baseline forecast.

3.3.2 The latest REM forecast indicates a significantly higher level of employment growth than the previous baseline REM in the ELR – with an annual average of **1,628 jobs** compared with 1,111 jobs. This may reflect several factors, including settling of the modelling after the Covid-19 Pandemic and Brexit and updates to the model.

3.3.3 This level of growth lies between the mid-point (1,514) and upper bound (1,682) of the Higher Growth Scenario in the ELR. The ELR recommended an aggregate land requirement based on the range between the lower (1,346) and upper bounds (1,682) of the Higher Growth Scenario. Accordingly, this addendum does not seek to construct a new scenario based on a level of growth in excess of this level.

3.3.4 It is however considered appropriate to develop a new scenario based on an alternative distribution of growth across industrial sectors – reflecting changing national economic policy and the emphasis of the Growth Plan for Bradford. This is referred to as the **Alternative Scenario**. This scenario increases jobs in following sectors to align with 2024 ELR Higher Growth Mid-Point Scenario:

- Information and Communications
- Professional and Other Private Services

3.3.5 Additional jobs are also added to the Transport & Storage sector (but with the level still below that in the 2024 ELR Higher Growth Mid-Point Scenario) and the Manufacturing sector (reflecting significant emphasis in recently announced national economic policy).

3.3.6 These increases are offset by a reduction in growth in public services (which was considered significantly above trend), thereby maintaining aggregate total jobs change at the same level as the latest REM baseline forecast.

3.3.7 **Table 3.2** presents the forecast average annual change in employment under the new baseline forecast and Alternative Scenario, which equates to the same annual average figure.

Table 3.2: Scenarios based on latest REM forecast (Addendum, 2026)

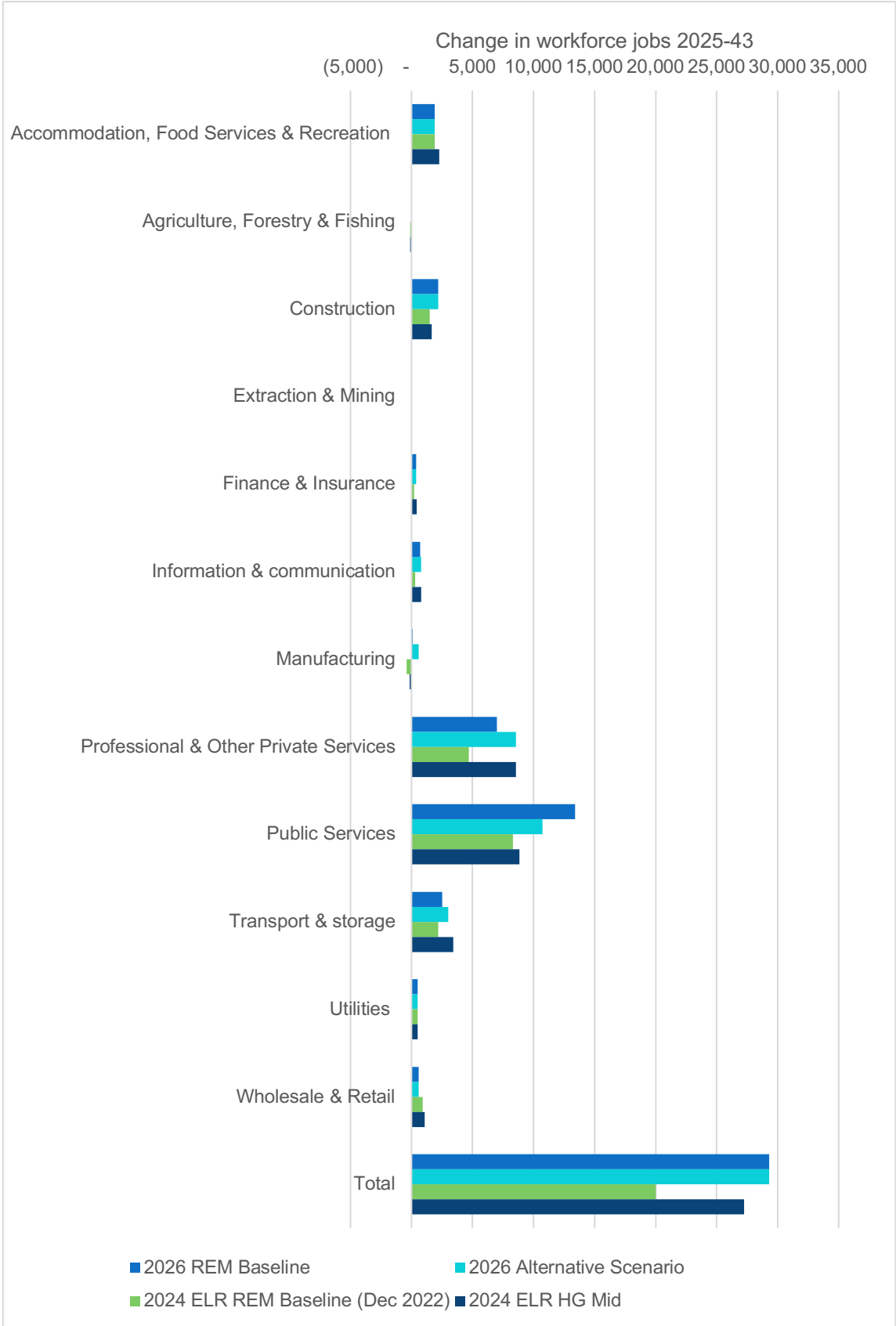
Scenario	Change in total employment, 2025-2043
	Annual average
Baseline forecast (REM)	1,628
Alternative Scenario	1,628

Note – REM refers to the REM forecast (February 2025). Total workforce jobs.

3.3.8 For comparison, **Figure 3.1** illustrates employment change by sector for the baseline forecast and Alternative Scenario alongside the ELR REM baseline and Mid-point Higher Growth Scenario.

3.3.9 In terms of the latest baseline REM forecast, there are some differences in the structure of employment change. The latest baseline REM forecasts a small expansion in the Manufacturing sector whereas the ELR Mid-Point Higher Growth forecast a small contraction. It also forecasts a larger expansion in the Construction and Public Services sectors, and less expansion in the Professional & Other Private Services sector.

Figure 3.1: Additional employment growth by sector – Addendum 2026 scenarios vs. ELR 2024 scenarios



Note – ELR figures relate to 2023-2041 period.

3.4 Implications

3.4.1 The latest baseline REM forecast indicates a level of employment growth that lies between the mid-point and upper bound of the ELR Higher Growth Scenario. The ELR recommended an aggregate land requirement based on the range between the lower and upper bounds of the Higher Growth Scenario. Accordingly, in this addendum the latest baseline REM forecast along with the **Alternative Scenario** is taken forward in estimating an updated land requirement. The **Alternative Scenario** reflects changing national economic policy and the emphasis of the Growth Plan for Bradford.

4 Demand: Updated Land Requirement

4.1 Overview

4.1.1 This section of the report updates the estimated land requirement using the same approach as applied in the ELR. It considers both the updated econometrics forecasts and the most up to date historic take-up data from the Council. The commercial property market analysis and business survey in the ELR remain relevant wider evidence in planning for need.

4.2 Econometric forecasts (labour demand)

ELR (March 2024) estimates

4.2.1 On the basis of the econometric forecasts at that time, the ELR estimated a gross land requirement. This estimate allowed for changing working practices toward more home-based and hybrid working patterns. For ease of reference, the results are shown in **Table 4.1** and **4.2**.

Table 4.1: Gross land requirements (ha) with working practices adjustment, 2023-2041 (ELR, March 2024)

Scenario	Gross land (Ha)			
	Office E(g)	Industrial B2	Storage or Distribution B8	Total
Baseline (REM)	11.0	-1.5	39.0	48.5
Higher Growth (REM+) - Lower	14.3	1.2	47.0	62.4
Mid-point - Higher Growth Scenario	16.2	2.1	57.8	76.1
Higher Growth (REM+) - Upper	18.2	3.0	68.6	89.7

Note – figures include rounding.

Table 4.2: Gross land requirements, with working practices adjustment, annual average (ha), 2023-2041 (ELR, March 2024)

Scenario	Gross land (Ha) - Annual average			
	Office E(g)	Industrial B2	Storage or Distribution B8	Total
Baseline (REM)	0.6	-0.1	2.2	2.7
Higher Growth (REM+) - Lower	0.8	0.1	2.6	3.5
Mid-point - Higher Growth Scenario	0.9	0.1	3.2	4.2
Higher Growth (REM+) - Upper	1.0	0.2	3.8	5.0

Note – figures include rounding.

Updated estimates

4.2.2 The econometric forecast-based estimate of the land requirement is firstly updated using the latest baseline REM forecast. This considers the new plan period, 2025-2043.

4.2.3 **Tables 4.3 and 4.4** below show the updated land requirement. To add further granularity, this estimate includes breakdown of E(g) use classes.

Table 4.3: Gross land requirements (ha) with working practices adjustment, 2025-2043

Scenario	Gross land (Ha)				
	Office E(g)(i)	R&D E(g)(ii)	Industrial E(g)(iii)/B2	Storage or Distribution B8	Total
Baseline (REM)	14.6	2.4	3.6	37.5	58.1
Alternative Scenario	14.6	3.6	8.1	44.5	70.8

Note – figures include rounding.

Table 4.4: Gross land requirements, with working practices adjustment, annual average (ha), 2025-2043

Scenario	Gross land (Ha) – Annual average				
	Office E(g)(i)	R&D E(g)(ii)	Industrial E(g)(iii)/B2	Storage or Distribution B8	Total
Baseline (REM)	0.8	0.1	0.2	2.1	3.2
Alternative Scenario	0.8	0.2	0.4	2.5	3.9

Note – figures include rounding.

4.2.4 Overall, the results from the economic forecasting indicate a gross employment land requirement over the plan period of **58.1 ha to 70.8 ha**. This equates to an annual average of +3.2 ha to +3.9 ha.

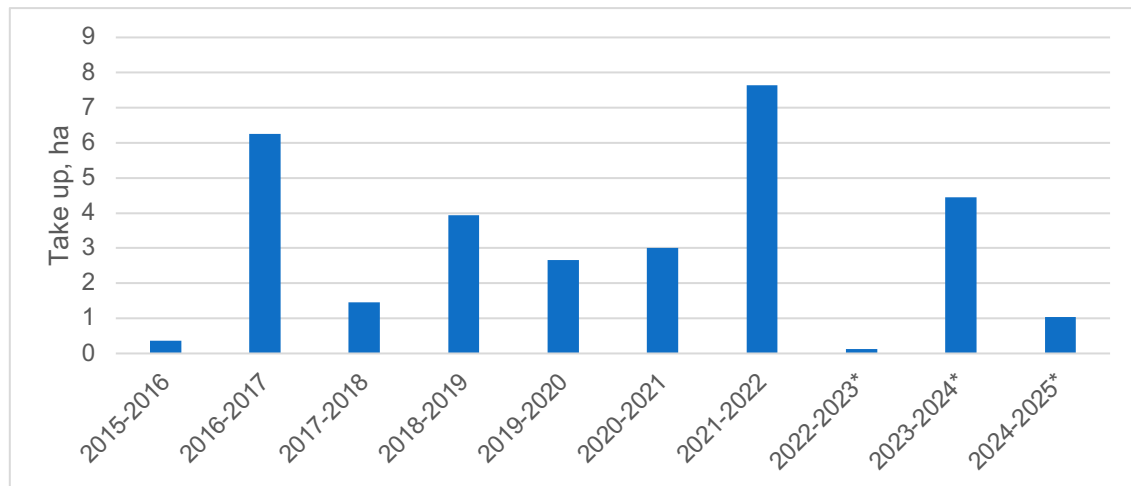
4.2.5 These results include a 20% margin allowance and adjustment for changing working practices.

4.3 Historic take-up

Updated estimates

4.3.1 **Figure 4.1** shows the annual take-up of employment land (all types) over the period 2015-2025. This shows significant variation year to year, with particularly pronounced higher figures in 2016/17, 2021/22 and 2023/24. Taking the 10-year period 2015-2025, the average annual take-up figure is 3.1ha. Taking the most recent 5-year period 2020-2025, the average figure across this period is 3.3ha.

Figure 4.1: Employment land take-up (ha), 2015-2025



Source: Using Council data.

4.3.2 **Table 4.5** shows the detailed breakdown of take-up by use-class for each year. In the peak years (2016/17, 2021/22 and 2023/24), the majority of this take up was B8 (2016/17) and B2 space (2021/22 and 2023/24).

Table 4.5: Historic take-up by use-class, 2015-25

Year	Net Take Up (Ha)*	Take Up (sqm)					Total Take Up (sqm)
		Office E(g)(i)	R&D E(g)(ii)	Industrial Processes E(g)(iii)	General Industrial B2	Storage or Distribution B8	
2015-2016	0.36	0	0	1,800	0	0	1,800
2016-2017	6.25	1,534	0	1,741	1,723	18,074	23,072
2017-2018	1.45	285	0	4,056	5,904	86	10,331
2018-2019	3.93	1,517	40	1,200	11,950	6,576	21,283
2019-2020	2.66	1,771	0	4,232	1,668	1,730	9,401
2020-2021	3.01	180	0	2,600	4,916	4,095	11,791
2021-2022	7.64	1,460	0	482	20,944	1,902	24,788
2022-2023*	0.12	-948	0	0	2,131	85	1,268
2023-2024*	4.45	7,648	60	-311	11,997	2,041	21,435
2024-2025*	1.04	624	150	-2,866	3,213	1,400	2,521
Total 2013-2023	30.91	14,071	250	12,934	64,446	35,989	127,690
*Includes losses							

Source: Council data.

4.3.3 **Table 4.6** shows the aggregate split of take up by use-class using 10-year (2015-25) and 5-year (2020-25) time periods. This shows that B2 accounted for the largest proportion of take-up for both periods, with this growing as a proportion in the most recent 5 years. Comparing the 10 year and 5-year periods also shows that the E(g)(i) take-up has increased as a proportion of total take-up while B8 has decreased.

Table 4.6: Aggregate take up by use-class, sqm

Period	Office E(g)(i)	R&D E(g)(ii)	Industrial Processes E(g)(iii)	General Industrial B2	Storage or Distribution B8	Total
10-year						
Total	14,071	250	12,934	64,446	35,989	127,690
% of total	11.0%	0.2%	10.1%	50.5%	28.2%	100%
Annual average	1,407	25	1,293	6,445	3,599	12,769
5-year						
Total	8,964	210	-95	43,201	9,523	61,803
% of total	14.5%	0.3%	-0.2%	70.0%	15.4%	100%
Annual average	1,793	42	-19	8,640	1,905	12,361

Source: Using Council data. Figures rounded.

4.3.4 **Table 4.7** projects these average annual historic rates forward over the plan period. This suggests that if past trends were replicated in the future, this suggests a net overall land requirement of between 58.1ha and 61.3ha. For industrial land requirements this equates to between 39.8ha (10-year long term average) and 44.3ha (5-year short-term average).

Table 4.7: Net land requirement based on historic take-up, ha

Historic take-up average	Net land requirement (ha), 2025-2043				
	Office E(g)(i)	R&D E(g)(ii)	Industrial E(g)(iii)/B2	Storage or Distribution B8	Total
Long-term (10-year)	2.9	0.1	39.8	18.5	61.3
Short-term (5-year)	3.7	0.2	44.3	9.8	58.1

Source: Using Council data. Figures rounded.

4.3.5 This approach assumes that past trends of development continue unchanged and may not fully reflect changes in the economy. It should be noted that no adjustment for changing working practices and E(g) demand has been made.

4.3.6 To estimate a gross land requirement, the same steps are applied as with econometric forecasts. The results are provided in **Table 4.8**.

Table 4.8: Gross land requirements (ha), 2025-2043

Historic take-up average	Gross land requirement (ha), 2025-2043				
	Office E(g)(i)	R&D E(g)(ii)	Industrial E(g)(iii)/B2	Storage or Distribution B8	Total
Long-term (10-year)	3.5	0.2	47.8	22.2	73.6
Short-term (5-year)	4.5	0.3	53.2	11.8	69.7

Source: Using Council data. Figures rounded.

4.4 Summary of requirement

4.4.1 In summary, the total range of total gross land requirements based upon econometric forecasts and historic take-up for 2025-2043 are detailed below in **Table 4.9**.

Table 4.9: Summary of results

	Net requirement (ha)	Margin (ha)	Gross requirement (ha)	With working practices adjustment
Econometric forecasts (labour demand)	53.8 – 65.4	10.5 – 11.7	64.4 - 77.1	58.1 – 70.8
Historic take-up (LT)	61.3	12.3	73.6	n/a
Historic take-up (ST)	58.1	11.6	69.7	n/a

4.5 Implications

4.5.1 On the basis of the latest updated econometric forecasts, the estimated gross employment land requirement over the plan period is 58.1 ha to 70.8 ha. This equates to an annual average of +3.2 to +3.9 ha.

4.5.2 For reference, this compares with an estimated requirement of 48.5 ha to 89.7 ha in the ELR (March 2024). It is noted that although forecast annual average jobs growth in the new baseline REM (and Alternative Scenario) (1,628) is higher than the Mid-point Higher Growth Scenario in the ELR (1,514), the estimated land requirement is lower. This results from a different sectoral growth pattern.

4.5.3 It is recommended that the Council plan toward the upper end of this range, reflecting the shape of sectoral change in the **Alternative Scenario**. Further, given the shift in national economic policy, we could encourage sufficient flexibility to accommodate the potential for greater R&D activity.

4.5.3 **Table 4.10** and **Table 4.11** provide a summary of ranges plus a likely defined **Hybrid Scenario** following discussions with the Council and based upon report findings:

Table 4.10: Options for Gross Land Requirements

Scenario	Gross land (Ha)				
	Office E(g)(i)	R&D E(g)(ii)	Industrial E(g)(iii)/B2	Storage or Distribution B8	Total
Econometric forecasts (labour demand)	14.6	2.4 – 3.6	3.6 – 8.1	37.5 – 44.5	58.1 – 70.8
Projecting forward historic take-up	3.5 – 4.5	0.2 – 0.3	47.8 – 53.2	11.8 – 22.2	63.3 – 80.2

Note – figures include rounding. E(g)(i) requirement includes working practices adjustment. The range presented for projecting forward historic take-up reflects a combination of the ST and LT figures.

4.5.4 In considering the implications of these findings, it is important to adhere to the requirements of PPG which states that local authorities should

develop an estimate of future employment land requirements by taking into account a range of qualitative and quantitative forecasts and data sources.

4.5.5 As noted in the ELR, it is recognised that the econometric forecast-based approach only generates a small need for E(g)(iii)/B2 space. This arises since growth according to these forecasts is focussed in the Professional Services sector and related sectors, and sectors associated with distribution type uses. It is also important however to take into due consideration of local economic and commercial market intelligence – including that obtained through engagement of local agents, businesses and economic development stakeholders. In particular, this highlights strong demand for B2 space and a need to provide a sufficient supply of suitable sites to enable existing established industrial businesses – including in the manufacturing sector - to grow in the future. This space also needs to be in the right locations, providing choice in the key settlements and near existing business clusters.

4.5.6 Given the recent shift in national economic policy toward reindustrialisation, we would add further emphasis on the importance of ensuring sufficient E(g)(iii)/B2 space – and planning for an additional allowance for B2.

4.5.7 Table 4.11 summarises the final recommendations for a land requirement based on a likely defined **Hybrid Scenario**.

Table 4.11: Recommendations for Gross Land Requirements

Scenario	Gross land (Ha)				
	Office E(g)(i)	R&D E(g)(ii)	Industrial E(g)(iii)/B2	Storage or Distribution B8	Total
Hybrid Scenario	14.6	3.6	47.8	44.5	110.5

Note – figures represent an alternative scenario based on labour demand and historic take-up in the case of industrial.

5 Demand-Supply Balance

5.1 Quantitative demand-supply balance

5.1.1 On the demand-side, the estimated requirement is in the range of 58.1 ha to 110.5 ha (including an adjustment for changing working practices). As stated earlier, it is recommended that Bradford's employment land requirement in the plan period 2025-2043 is aligned with upper end of this range.

5.1.2 On the supply side, the latest supply position indicates an aggregate supply of 101.6 ha.

5.1.3 Considering the balance, there is a surplus of land in the **Baseline Scenario** and **Alternative Scenario**. In the **Hybrid Scenario** there is a small shortfall.

Table 5.1: Demand-supply balance (ha), 2025-2043

	Demand-supply balance		
	REM Baseline	Alternative Scenario	Hybrid Scenario
Employment Land Requirement (ha)*	58.1	70.8	110.5
Estimated Employment Land Supply	101.6	101.6	101.6
Surplus (+) / Shortfall (-)	+43.5	+30.8	-8.9

*including adjustment for changing working practices. Figures are rounded

5.1.4 Examining the balance by use class, there is a surplus of E(g)(iii)/B2 land in the **Baseline Scenario** and **Alternative Scenario** whilst supply and demand are broadly balanced in the **Hybrid Scenario**. For other use classes in the **Hybrid Scenario** there is small surplus of E(g)(ii) space and small shortfall in E(g)(i) and B8 space. There is potential for at least some of this shortfall to be addressed through intensification of land use.

Table 5.2: Demand-supply balance by use class (ha), 2025-2043

Scenario	Demand-supply balance									
	Baseline (REM)					Alternative Scenario				
	Office E(g)(i)	R&D E(g)(ii)	Ind E(g)(iii)/ B2	Stor& Dist B8	Total	Office E(g)(i)	R&D E(g)(ii)	Ind E(g)(iii)/ B2	Stor& Dist B8	Total
Employment Land Requirement (ha)*	14.6	2.4	3.6	37.5	58.1	14.6	3.6	8.1	44.5	70.8
Estimated Employment Land Supply	9.9	7.4	47.0	37.3	101.6	9.9	7.4	47.0	37.3	101.6
Surplus (+) / Shortfall (-)	-4.7	+5.0	+43.4	-0.2	+43.5	-4.7	+3.8	+38.9	-7.2	+30.8
Scenario	Demand-supply balance									
	Hybrid Scenario					J				
	Office E(g)(i)	R&D E(g)(ii)	Ind E(g)(iii)/ B2	Stor& Dist B8	Total					
Employment Land Requirement (ha)*	14.6	3.6	47.8	44.5	110.5					
Estimated Employment Land Supply	9.9	7.4	47.0	37.3	101.6					
Surplus (+) / Shortfall (-)	-4.7	+3.8	-0.8	-7.2	-8.9					

Note – figures include rounding. Figures do not include additional supply through intensification of land use.

5.2 Qualitative demand-supply balance

5.2.1 Even if a deficit of balance is not identified, there are several qualitative factors which may mean that additional land is required. These include to:

- Address specific gaps in the provision of particular types of premises;
- Improve choice;
- Improve quality;
- Balance the spatial distribution of employment sites; and
- Economic growth and sectoral strategies.

5.2.2 In the office market, analysis in the ELR established that whilst existing availability is good in terms of scale there is potential to improve quality in order to attract new occupiers to Bradford. Engagement indicated that a higher quality offer and critical mass is needed in Bradford to attract occupiers. Leeds is in close proximity and is currently dominant in this market. Ensuring an adequate supply of quality office space with access to amenities in the city centre will be important in supporting growth aspirations in terms of jobs growth in the Professional Services and related sectors.

5.2.3 Since the ELR, a clear post-covid era has now become established. There are less losses of office space occurring and a trend toward premium grade floorspace in sustainable locations. There is also a demand for more flexible workspace, with easy in and out terms.

5.2.4 In the industrial market, the findings of engagement as part of the ELR indicate that it will be important to ensure sufficient supply of sites in the key settlements to facilitate the growth of existing indigenous businesses. Many of these businesses have been long established in their locations with established local labour pools. Without suitable premises for expansion, there may be a loss of these businesses from the District or constrained growth in these businesses. Agents indicate that proximity to key traffic corridors (e.g. motorways) is the most cited characteristic that occupiers were looking for. Ensuring the availability of sufficient allocations around the M606 was highlighted. Areas with a higher level of small manufacturing businesses (<20 employees) – for example, Airedale – are also important. Relocating even 10 miles or so away may be too far for existing skilled staff. Sufficient provision of land in these locations is crucial for small business expansion.

5.2.5 Since the ELR, the emphasis of national economic policy also means allowing for growth in R&D and industrial uses is particularly important.

6 Conclusions

- 6.1 This Addendum comes at a time of significant transition – both in national economic policy and in local economic strategy. Whilst this can be seen as positive for Bradford, there is considerable uncertainty over the sectoral shape of growth over coming years.
- 6.2 Overall, the results based on the latest econometric forecasts indicate a gross employment land requirement over the plan period of 58.1 ha to 70.8 ha. This equates to an annual average of +3.2 ha to +3.9 ha. These represent the **Baseline Scenario** and **Alternative Scenario**. A **Hybrid Scenario** has also been developed following discussions with the Council. This takes into account both the econometric forecasts and historic take-up of industrial land. **In the Hybrid Scenario, the estimated requirement is 110.5 ha (equating to an annual average of +6.1 ha).**
- 6.3 The updated analysis indicates that there is a surplus of employment land overall in the **Baseline Scenario** and **Alternative Scenario**. In the **Hybrid Scenario** there is a small shortfall.
- 6.4 On an individual use class basis, the supply and demand of E(g)(iii)/B2 land is broadly balanced in the **Hybrid Scenario**. For other use classes in the **Hybrid Scenario** there is small surplus of E(g)(ii) space and small shortfall in E(g)(i) and B8 space. There is potential for at least some of this shortfall to be addressed through intensification of land use.
- 6.5 For E(g)(i), provision of high-quality locations in Bradford City Centre is increasingly important. The emphasis on growth in the key sectors identified in the Growth Plan provides a driver for transformation of the city over time. This is coupled with major strategic transport investments that are expected to be delivered during the plan period. It is also noted that greater intensification of development in the city may mean that floorspace requirements can be met by a smaller quantum of land.
- 6.6 Alongside this, ensuring sufficient flexibility to accommodate E(g)(ii) R&D related activity will be important. Given the recent shift in national economic policy toward reindustrialisation, we would add further emphasis to our recommendation in the ELR to plan for an additional allowance for E(iii)/B2 space (over the demand indicated by econometric forecasts).
- 6.7 For B8 space, we would urge caution in respect of the level of demand indicated by the econometric forecasts. This far exceeds both long-term (10-year) and short-term (5-year) historic take-up trends. The short-term historic take-up trend also sits at around 50% of that in the long-term trend – indicating downward trend in demand more recently. Decisions on the provision of B8 space should also be made taking into consideration the role of Bradford for this type of space versus other locations in the wider Leeds City Region.
- 6.8 On a general level it is also recommended that allocations ensure sufficient opportunity for economic clustering rather than providing a dispersed portfolio of sites. This will help to support both existing mature manufacturing clusters – for example, in Airedale - as well as the developing knowledge-based services in the City Centre.