

Employment Land Review

Manchester City Council

Report

April 2025

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1.0 INTRODUCTION

- 1.1 This **Employment Land Review** has been prepared by BE Group and LM6 on behalf of Manchester City Council.
- 1.2 This study is to review the City's range of strategic employment locations, employment allocations and areas and advise Council on whether these sites should be retained, removed or altered in the current review of the Manchester Local Plan. The study builds on existing policies and studies undertaken in the City and Greater Manchester area, including Places for Everyone and the available Strategic Regeneration Frameworks for key employment areas within the City.

Methodology

- 1.3 Primary and secondary research techniques have been used in undertaking this review, including conversations with commercial agents, site inspections and reviewing national, sub-regional and local reports and strategies relevant to this study.
- 1.4 A sectoral employment analysis has been undertaken, which highlights current strengths in the City, including subarea differences. This has been compared with the Greater Manchester strengths identified in the Places for Everyone.
- 1.5 The review of the employment areas has focused on areas outside of the City Centre and has included a review of relevant policies for the sites, a critique of current uses and developments, an assessment of opportunities and recommendations as to potential uses over the forthcoming planning period. The review has assessed the Core Strategy's Strategic Employment Locations and the Unitary Development Plan's (UDP's) Economic Improvement Areas in detail. The employment allocations saved from the UDP have had a higher-level review.
- 1.6 The supply of employment land has been critiqued compared to the forecast demand in the Places for Everyone. This includes commentary and recommendations as to the need for further employment land to be made available.

2.0 POLICY CONTEXT

- 2.1 The following policy documents provide the overall context within which this employment analysis has been undertaken. Policies and strategies specifically relevant to certain employment locations have been referenced in the sections that address those areas.

National Planning Policy Framework (NPPF), December 2024

- 2.2 The framework set out planning policies for England and the ways in which they can be applied. The NPPF has been updated with the change of government in 2024, including new direction on development, particularly regarding driving housing growth.
- 2.3 The NPP introduction states that it “provides a framework within which locally-prepared plans can provide for housing and other development in a sustainable manner.” The NPPF must be taken into account when developing local authority development plans and is a material consideration in planning decisions.
- 2.4 Chapter 6 ‘Building a Strong, Competitive Economy’ states that “planning policies and decisions should help create the conditions in which businesses can invest, expand and adapt. Significant weight should be placed on the need to support economic growth and productivity, taking into account both local business needs and wider opportunities for development.” The chapter outlines how planning policies should support economic growth including through having a clear vision and strategy, identifying strategic sites, meeting the needs of the modern economy, addressing barriers to investment and incorporating flexibility.
- 2.5 Planning policies and decisions should account for locational requirements of different sectors, including making provision for
- a) 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);
 - b) 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

- c) the expansion or modernisation of other industries of local, regional or national importance to support economic growth and resilience.” (para 87)
- 2.6 Guidance for the use of land for employment, and other sites, is contained in Chapter 11 on ‘Making Effective Use of Land.’ “Strategic policies should set out a clear strategy for accommodating objectively assessed needs, in a way that makes as much use as possible of previously-developed or ‘brownfield’ land.”
- 2.7 Para 127 encourages reallocating land where there is no reasonable prospect of an application coming forward for the allocated use. Specifically Local Planning Authorities should:
- “As part of plan updates, reallocate the land for a more deliverable use that can help to address identified needs (or, if appropriate, deallocate a site which is undeveloped)
 - In the interim, prior to updating the plan, applications for alternative uses on the land should be supported, where the proposed use would contribute to meeting an unmet need for development in the area.”
- 2.8 “Local planning authorities should also take a positive approach to applications for alternative uses of land which is currently developed but not allocated for a specific purpose in plans, where this would help to meet identified development needs. In particular, they should support proposals to ... use retail and employment land for homes in areas of high housing demand, provided this would not undermine key economic sectors or sites or the vitality and viability of town centres, and would be compatible with other policies in this Framework.” (para 128).

Greater Manchester

Places for Everyone Joint Development Plan, March 2024

- 2.9 This document was prepared in response to the withdrawal of the Greater Manchester Strategic Framework (GMSF), following Stockport Council’s withdrawal from the process. The Places for Everyone is a joint Local Plan between Bolton, Bury, Manchester, Oldham, Rochdale, Salford, Tameside, Trafford and Wigan, setting out strategic housing and employment need to 2039 across the authorities and ensuring there is an appropriate supply of land to deliver that need.

2.10 The Joint Development Plan outlines a vision for Greater Manchester as ‘to make Greater Manchester one of the best places in the world to grow up, get on and grow old’. To meet this vision, the Plan outlines ten strategic objectives, which are:

1. Meet our housing need
2. Create neighbourhoods of choice
3. Playing our part in ensuring a thriving and productive economy in all parts of Greater Manchester
4. Maximise the potential arising from our national and international assets
5. Reduce inequalities and improve prosperity
6. Promote the sustainable movement of people, goods and information
7. Playing our part in ensuring that Greater Manchester is a more resilient and carbon neutral city-region
8. Improve the quality of our natural environment and access to green spaces
9. Ensure access to physical and social infrastructure
10. Promote the health and wellbeing of communities.

2.11 While several of these strategic objectives have relevance to employment land and jobs, the most pertinent objective is objective three. The Plan commits the local authorities to ensuring that there is adequate development land to meet employment needs, prioritise the use of brownfield land, ensure diversity of employment sites and premises and promote the development of high value clusters in key sectors such as:

- Advanced manufacturing
- Digital and cyber
- Health innovation, including life sciences
- Low carbon goods and services
- Business, financial and professional services
- Logistics.

2.12 Policy JP-Strat2: City Centre states that the role of the City Centre will be strengthened considerably. The City Centre will be a priority for investment in development and infrastructure, “enabling it to compete effectively at the international level for investment, businesses, skilled workers, residents and tourists.” Places for Everyone outlines an indicative expanded City Centre boundary (see Figure 4.3 of PfE).

- 2.13 The Places for Jobs section of the document states that economic growth is central to the overall strategy for Greater Manchester. It refers to Greater Manchester's Local Industrial Strategy (reviewed below) and Places for Everyone is aligned with this. Greater Manchester's is a key economic node for the UK, providing one-fifth of the population, jobs and economic output of the North of England and having a bigger economy than Wales and Northern Ireland. It is second only to London in attracting foreign direct investment.
- 2.14 The Places for Everyone outlines the sources of land supply across Greater Manchester for offices (Table 6.1 of the report) and industrial and warehousing (Table 6.2), which are replicated below. These figures for Manchester have guided the production of this employment land study.

Table 1 – Places for Everyone Office Land Supply 2022-2039

District	Existing Brownfield Supply 2022-2039 (sqm)	Existing Greenfield Supply 2022-2039 (sqm)	Existing Mixed Supply 2022-2039 (sqm)	Places for Everyone Allocations (sqm)	Total 2022-2039
Bolton	56,780	3,447	10,512	-	70,739
Bury	1,177	-	-	-	1,177
Manchester	1,873,445	128,484	3,306	64,500	2,069,735
Oldham	67,093	-	14,905	-	81,998
Rochdale	19,753	81,249	-	-	101,002
Salford	309,102	-	-	-	309,102
Tameside	20,110	570	-	-	20,680
Trafford	190,661	33,000	-	-	223,661
Wigan	-	2,055	-	-	2,055
Places for Everyone	2,538,122	248,805	28,723	64,500	2,880,150

Source: Places for Everyone, Table 6.1

Table 2 – Places for Everyone Industry and Warehouse Land Supply 2022-2039

District	Existing Brownfield Supply 2022-2039 (sqm)	Existing Greenfield Supply 2022-2039 (sqm)	Existing Mixed Supply 2022-2039 (sqm)	Places for Everyone Allocations (sqm)	Total 2022-2039
Bolton	195,913	115,295	8,653	386,000	705,861
Bury	10,725	6,859	-	591,000	608,584
Manchester	37,838	12,855	-	0	50,693
Oldham	83,171	-	59,031	136,720	278,922
Rochdale	137,572	203,311	-	244,000	584,883
Salford	224,862	3,454	-	320,000	548,316
Tameside	59,867	52,489	1,716	160,000	274,072
Trafford	414,439	-	26,115	103,365	543,919
Wigan	83,125	303,579	33,117	60,500	480,321
Places for Everyone	1,247,512	697,842	128,632	2,001,585	4,075,571

Source: Places for Everyone, Table 6.2

2.15 Policy JP-J3 (Office Development) states that the region will provide at least 2,019,000 sqm of office floorspace over the period 2022-2039, more than half of which would be provided in the City Centre. Policy JP-J4 (Industry and Warehousing Development) states that the region will provide at least 3,513,000 sqm of industrial and warehousing floorspace over the same period.

2.16 Based on this requirement, a methodology was proposed to in the **Proposed Employment Requirement Calculation** paper, which calculated a floorspace requirement of 1,450,895 sqm of office space (72 percent of the total) and 77,896 sqm of industrial and warehousing floorspace (2 percent of the total) for Manchester.

Greater Manchester Transport Strategy 2040, January 2021 update

2.17 The Greater Manchester Transport Strategy sets out the region's long-term vision and ambition for transport. The Strategy is to meet the stated vision to have 'world class connections that support long-term, sustainable economic growth and access to opportunity for all'. The Strategy states that the transport system not only should support the needs of travelling customers, but that the 'transport system needs to help the local economy to flourish and prosper, and our residents to contribute to and benefit from that prosperity'. The transport system must connect people to opportunities and help create better places, reduce car and goods vehicles dominance and support new development and regeneration.

2.18 The Strategy outlines Principles to apply to improving Greater Manchester's transport system, which are:

- Integrated
- Inclusive
- Healthy
- Environmentally responsible
- Reliable
- Safe and secure
- Well maintained and resilient

2.19 Ambitions and Policies within each Principle are outlined in the Strategy. Of particular note for this Employment Land Review work are the following:

Policy 4: 'We will work with developers to ensure that new developments are accessible by sustainable modes, and to reduce transport emissions and impacts on the highway network.'

Policy 7: 'As we plan our transport network, we will support the creation of a more inclusive economy for GM by considering how best to improve the prospects of people living in deprived communities - including by ensuring that more people can access jobs, education, skills training and childcare.'

Policy 16: 'We will work with partners to support a rapid transition towards low emission vehicles in Greater Manchester, including developing a clear strategy on the Electric Vehicle Charging Infrastructure network required to provide greater confidence to residents and businesses to invest in electric vehicles.'

Policy 19: 'We will work, including through the GM logistics forums, to improve journey times and reliability for deliveries, and to reduce the environmental impact of logistics.'

Policy 20: 'We will ensure our streets are welcoming and safe spaces for all people, enabling more travel on foot, bike and public transport while creating better places that support local communities and businesses.'

Policy 29: 'We will expand the coverage and capacity of our rapid transit network (Metrolink, Rail and Bus Rapid Transit), to deliver improved connectivity to employment and other opportunities within the city-region.'

Policy 30: 'Working with partners, we will develop a rail network with the capacity, reliability, speed, resilience and quality to support growth in the Northern economy and extend the benefits of HS2 and Northern Powerhouse Rail throughout Greater Manchester.'

- 2.20 The Strategy recognises that Greater Manchester has an extensive public transport network though many locations are poorly serviced. Access to employment, services and leisure facilities is difficult without a car. In particular, major out-of-town employment areas, especially those with 24/7 operations, are difficult to service with a bus network. 'There is a need to improve access to existing and any future additional large scale out-of-centre employment areas by public transport, active travel links and measures such as car club /cycle hire as well as using behaviour change interventions to make people aware of their travel options.'

Greater Manchester Local Industrial Strategy, June 2019

- 2.21 This document states that it is an ambitious strategy 'designed to deliver an economy fit for the future, with prosperous communities across the city-region and radically increased productivity and earning power.' The Strategy aims to:

- 'set Greater Manchester up to be a global leader on health and care innovation - creating new industries and jobs, improving population health and extending healthy life expectancy
- position Greater Manchester as a world-leading city-region for innovative firms to experiment with, develop and adopt advanced materials in manufacturing
- build on Greater Manchester's position as a leading European digital city-region; enable the digitalisation of all sectors; and capitalise on the links between digital and creative industries that feed internationally significant clusters in broadcasting, content creation and media, and maximise growing assets in cyber security
- achieve carbon neutral living in Greater Manchester by 2038, by launching the UK's first city-region Clean Growth mission.'

- 2.22 Specific strategies in sectors are identified in the Local Industrial Strategy, including in health innovation, advanced materials and manufacturing, digital, creative and media and clean growth.

- 2.23 The Strategy recognises the significant variation in places within the city-region and thus directs Greater Manchester's local authorities to develop a local response to the Local Industrial Strategy, to identify key opportunities and barriers in each locality and

ensure coordinated implementation. 'The city-region will also take an integrated place-based approach to bringing forward strategic regeneration proposals in town centres and strategic sites, which integrate investment in land remediation, housing transport and other infrastructure to create sustainable employment locations.'

Manchester

Core Strategy 2012 to 2027

- 2.24 The Core Strategy was adopted in July 2012 and is the key document guiding growth in the City. It outlines a vision for Manchester by 2027 (section 4) and spatial objectives (section 5) to reach that vision. These spatial objectives are detailed in the subsequent sections of the Core Strategy.
- 2.25 Policy SP1 outlines the spatial principles to guide growth of Manchester, including that the Regional Centre (City Centre and surrounds) will be the focus for economic and commercial development, retail, leisure and culture, alongside high-quality living. The growth of Manchester Airport will be a second hub of economic activity for the City.
- 2.26 The Delivery Strategy within the Core Strategy sets a target of 65 percent of new employment land to be provided in the Regional Centre.
- 2.27 Policy EC1 states that a minimum of 200 ha of employment land will be developed between 2010 and 2027, including:
- Offices (B1a) – 140 ha
 - Research and development and industry (B1b, B1c, B2) – 25 ha
 - Distribution and warehousing (B8) – 35 ha
- 2.28 Policy EC1 also guides the distribution of this employment land, with the key locations for major employment land growth being:
- Regional Centre
 - City Centre – 33 ha
 - City Centre Fringe (including Strangeways, Collyhurst, Ancoats, New Islington and Manchester Science Park) – 25 ha
 - Central Park and Eastlands – 65 ha
 - Manchester Airport and the surrounding area – 50 ha

- 2.29 Policies for specific areas are detailed in the Core Strategy and these have been referenced later in this study as the specific areas are reviewed.

Investing in Success: An Economic Strategy for Manchester

- 2.30 Investing in Success is the Economic Strategy for Manchester and outlines a vision for Manchester's economy to contribute to UK's GDP and provide the best possible opportunities for Manchester's residents. The Economic Strategy identifies and discusses enablers of growth, including housing, transport, infrastructure, skills, enterprise and labour, investment, density and innovation. The Strategy notes that the City Centre is an "exemplar of high-value activity, where tradeable services – particularly in finance and other knowledge-intensive sectors – are clustering." It is noted in the Strategy that the economic scale of the City Centre is not proportionate to its potential, with a lower proportion of regional employment compared to London's centre.
- 2.31 The expansion of the City Centre is seen as crucial for fostering economic growth. While development is happening in the City Centre, "to accommodate the influx of high-value firms and skilled workers, the city needs to make strategic decisions regarding land use, balancing commercial, residential, and retail spaces effectively. The city centre will need to expand outward and upward, utilising land on the fringes for more productive purposes, and retrofitting existing buildings where possible."
- 2.32 It outlines five priorities to achieve the vision, which are detailed in the table below:

Table 3 – Economic Strategy: Five Priorities

Priorities	Comments
1. Use Investment and development to drive inclusive growth	<p>This priority recognises that the city centre is the focus for growth with good connectivity and it is important that the city centre is well connected to other employment nodes in the city region. Commitments of the Council include:</p> <ul style="list-style-type: none"> • 'Expanding the city centre and adding high-density commercial and residential space in appropriate locations • Protecting the unique economic function of the city centre as Greater Manchester's productive core • Ensuring that new developments adjacent to the city centre maximise their economic potential in terms of scale, quality and density • Ensuring that large-scale redevelopment projects outside of the city centre include economic assets that help new and existing neighbourhoods to thrive, such as the Southern Arc area comprising Manchester Airport, Airport City, Wythenshawe Civic Centre and Wythenshawe Hospital

Priorities	Comments
	<ul style="list-style-type: none"> • Maintaining Manchester's position as the most attractive UK destination for foreign direct investment outside of London, and increasing the volume of investment into Manchester businesses and property • Creating a framework for new development to ensure all major projects become inclusive exemplars economically, socially and environmentally, both in construction and in their end use, including creating good-quality employment paying the Real Living Wage • Creating and maintaining a development prospectus for new and existing investors in Manchester.'
2. Nurture thriving, productive and innovative sectors	<p>This priority looks to attract investment into high growth and productive sectors, to facilitate wider economic benefits. However, it is also important to support all sectors, including the foundational economy. Additional commitments of the Council are:</p> <ul style="list-style-type: none"> • 'Utilising levers and incentives, such as Investment and Growth Zones, to attract businesses and ensure they fully engage with existing support structures such as via enhanced training/recruitment, infrastructure or networking • Growing and promoting current and future knowledge-intensive sectors, such as AI, Cyber, FinTech and genomics • Building and expanding potential clusters of businesses at places such as North Manchester General Hospital and Wythenshawe Hospital • Fully mapping and promoting Manchester's innovation ecosystem to new businesses and investors • Growing the green economy by capitalising on investments in zero carbon to attract and retain innovative businesses.'
3. Develop world-class infrastructure, places and talent	<p>This priority focuses on the enablers of growth in Manchester. Infrastructure development is a key part of this and there is a need to improve transport and digital connectivity throughout the city. Social infrastructure investment is also required and the need to improve skills and attracting and retaining highly skilled workers. Additional commitments of the Council are:</p> <ul style="list-style-type: none"> • 'Developing and maintaining an understanding of Manchester's physical and social infrastructure needs and the volume of infrastructure investment required over the next decade • Ensuring that new development includes the right social, transport, energy and digital infrastructure • Increasing housing density in well-connected places • Working with TfGM to implement the Bee Network to connect more people to employment and training opportunities via sustainable and active travel • Creating well-managed neighbourhoods that are attractive to and affordable for highly skilled workers • Continuing to improve the city's vibrancy and liveability via investment in culture, sport and green spaces'
4. Transition to a zero-carbon and resilient economy	<p>This priority focuses on Manchester's commitment to being a zero-carbon city by 2038. This includes opportunities in the green economy, but it is also important that the most productive and highest growth industries are as sustainable as possible. Additional commitments of the Council are:</p> <ul style="list-style-type: none"> • 'Developing a Manchester standard for net-zero construction via the Local Plan, which incorporates both the construction and operation phases • Developing a climate-change risk and vulnerability assessment and Manchester Adaptation Plan to ensure that the city and its infrastructure are resilient to current and future climate-change impacts.

Priorities	Comments
	<ul style="list-style-type: none"> Increasing the amount of community and democratically owned businesses in Manchester.'
5. Include more people in economic opportunity	<p>This priority recognises the need to ensure that opportunities are available to all residents, including young people. Connecting residents to good quality jobs will improve prosperity and address poverty. Additional commitments of the Council are:</p> <ul style="list-style-type: none"> 'Connecting investors and new businesses in the city with the ecosystem of support for our residents, to help ensure that employment and training opportunities created are accessible Creating Community Economic Development Plans in neighbourhoods affected by largescale regeneration and development Working to understand the economic potential of other neighbourhoods and district centres, and how we can better connect communities to the cumulative benefits of growth in Manchester Maximising the social value of largescale development projects on local communities and the wider city, including commitments to good-quality employment and paying the Real Living Wage Capitalising on our UNICEF Child Friendly City status to develop the next generation of talent, with a focus on 16 and 17-year-olds and connecting businesses to schools Developing new ways to measure prosperity in Manchester.'

Source: Investing in Success: An Economic Strategy for Manchester

Our Manchester Strategy – Forward to 2025 (2021 reset)

2.33 The original Our Manchester Strategy 2016-2025 set out the priorities for Manchester to put Manchester in top-flight of world cities by 2025. The reset document in 2021 was prepared at the halfway stage of Strategy period, recognising that significant progress had been made and that the covid pandemic had substantially changed the environment. The reset document was based on extensive public consultation and feedback. The reset retained the Vision for Manchester to be a top-flight city by 2025, and to achieve this the update highlighted a renewed focus for Manchester on:

- **'Our young people** – providing investment, support, opportunity and hope for the future of the city.
- **Our economy** – fulfilling opportunities for our residents as we create and attract a talented, globally competitive and diverse workforce.
- **Our health** – tackling physical and mental inequalities and ensuring fair access to integrated services.
- **Our housing** – creating a choice of housing in liveable neighbourhoods across all the city.
- **Our environment** – pioneering zero-carbon solutions and improving green spaces.

- **Our infrastructure** – creating active, integrated, affordable and green transport, as well as better digital connections.’

2.34 Manchester’s priorities in achieving this are:

- **A Thriving and Sustainable City** – Manchester will ensure that its communities are vibrant and diverse, with a strong, inclusive and innovative economy.
- **A Highly Skilled City** – Manchester’s young people will have access to good-quality education to ensure they are work-ready. All residents will be supported to learn, progress, upskill and retrain.
- **A Progressive and Equitable City** – Manchester will strive to create a truly equal and inclusive city and improve physical and mental-health outcomes.
- **A Liveable and Zero-Carbon City** – Manchester will create sustainable, safe, resilient and cohesive neighbourhoods and will achieve its zero-carbon ambition by 2038.
- **A Connected City** – Manchester will increase walking and cycling and continue to develop its integrated public transport system. Manchester will become a digitally inclusive city, including better digital infrastructure, access to technology and strong digital skills.

Manchester Unitary Development Plan

2.35 Manchester’s Unitary Development Plan (UDP) was adopted in 1995 and while it has since been superseded by the Core Strategy (adopted 2012) as the key development plan instrument, several of the policies within the UDP were retained, including City-wide and area-specific policies. The retained area-specific policies are the most relevant to this Employment Land Review work and these have been reviewed in the chapters on specific employment areas later in this report.

Strategic Regeneration Frameworks

2.36 Manchester City Council has been preparing Strategic Regeneration Frameworks for its key locations, though are at varying stages of completion. Where completed, these have been reviewed in the area-specific chapters of this report. Consultations with the teams preparing the Frameworks have been undertaken, as well as feedback on the analysis. The Strategic Regeneration Frameworks will provide guidance on the mix, scale and phasing of employment development in each area.

3.0 SECTORAL ANALYSIS

Introduction

- 3.1 This section provides a summary of the socio-economic characteristics of Manchester in comparison to Greater Manchester, as appropriate. It brings together several data sources including Census, Business Register and Employment Survey (BRES) and ONS data to create profiles of the locations.

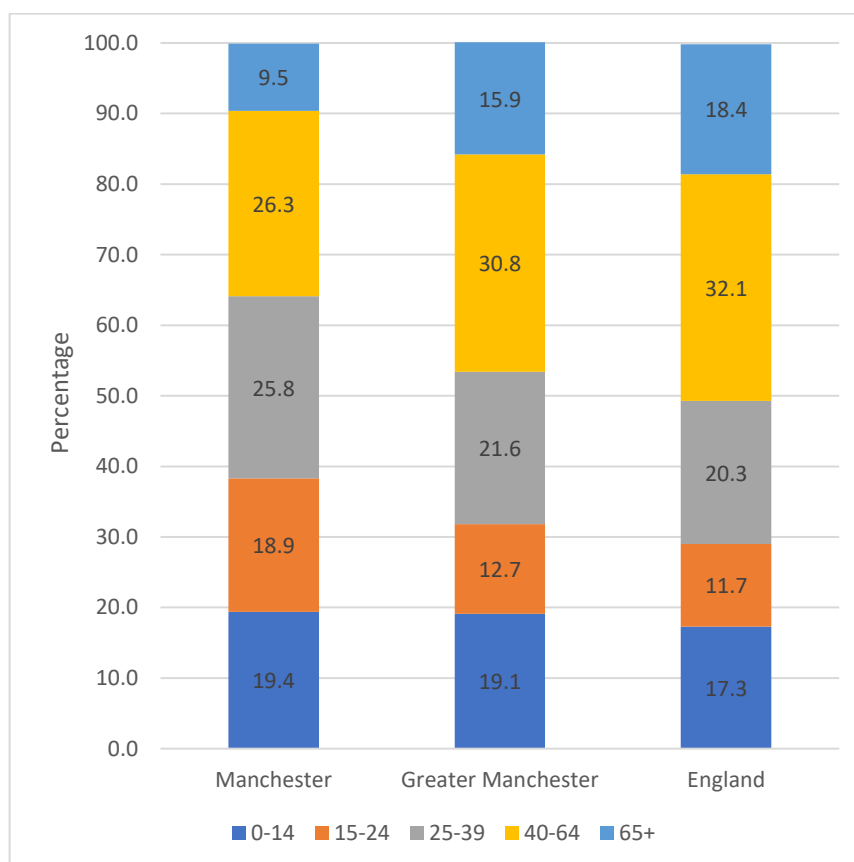
Demographic assessment

- 3.2 The population of the Manchester City local authority area was estimated to be 550,600 (2021 ONS population estimates). This was 19 percent of the Greater Manchester total. In 2011 the population of Manchester stood at 503,127. The increase in population to 2021 represents an 9.43 percent increase.

Age Profile

- 3.3 Figure 1 provides the age profile of Manchester in comparison with Greater Manchester and England, based on the data of the 2021 Census. This shows that Manchester had a noticeably younger population than the comparator areas with 38.3 percent of the population under 24 years or under and 25.8 percent aged 25-39 years. Only 9.5 percent of the population was 65+ years, compared to wider averages of 15.9-18.4 percent in Greater Manchester and England.
- 3.4 This population age profile shows that Manchester has a very strong representation of people of a working age, with 71.0 percent of the population aged 15-64 years, compared to 64.1 percent of England's population. This will be an attractive demographic feature of the population for prospective businesses and investors looking at Manchester as a business location.

Figure 1 – Population Age Profile



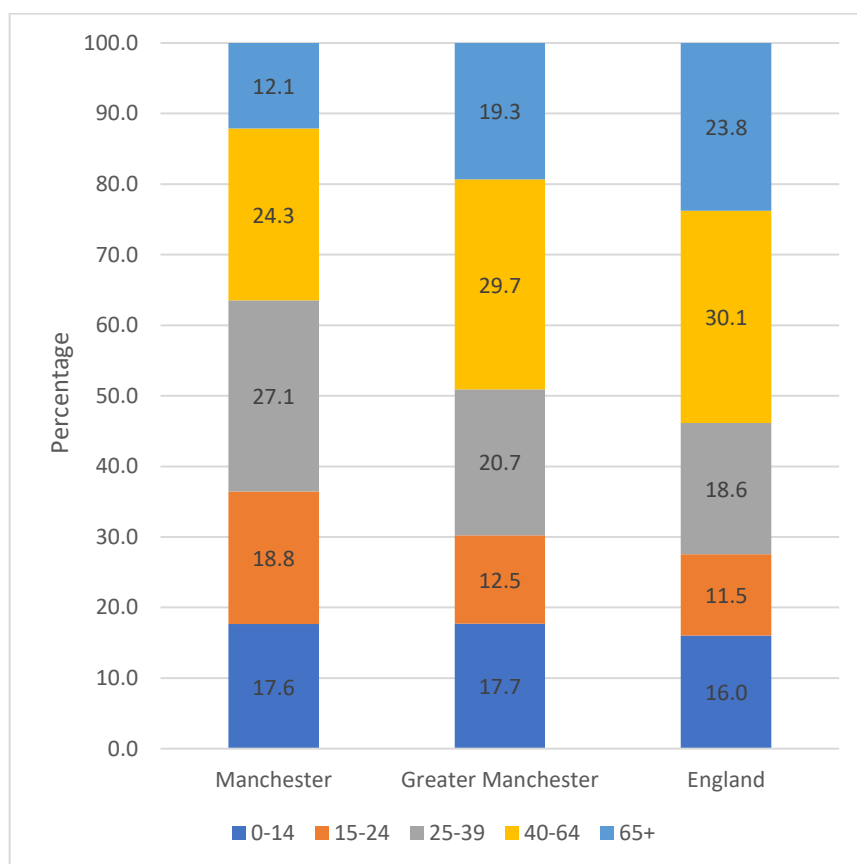
Source: ONS 2021 Census

* numbers may not add to 100.0 due to rounding

Projected Population Change

- 3.5 The population of Manchester is projected to grow to 593,497 persons by 2040 (ONS 2018-based population projections), which represents a growth of 6.7 percent on 2021 levels. The bulk of the growth in population is anticipated to be in the 65+ age group, which is consistent with other areas throughout the UK as the population ages and fertility rates continue to decline. However, as seen in the figure below, Manchester is still expected to have a significantly younger population profile than the Greater Manchester and England levels. Importantly, the working age population of Manchester is expected to remain relatively buoyant at 70.2 percent of the population (-0.8 percentage points on 2021 levels), which is higher than for the comparator areas, which area also anticipated to see larger decreases in the percentage of the population being of a working age (Greater Manchester (-2.1 percentage points) and England (-3.9 percentage points)).

Figure 2 – Projected Population Age Profile, 2040



Source: ONS 2018-based population projections

* numbers may not add to 100.0 due to rounding

Skills

- 3.6 Table 4 below shows the National Vocational Qualifications (NVQ) levels attained by the working age population of Manchester, compared with levels attained in Greater Manchester and England as of 2021. Individuals with NVQ4+ Qualifications, equal to degree level, made up the greatest proportion of Manchester's population. Manchester's proportion of highly qualified people, 45.1 percent was slightly above the national and regional averages of 43.2-39.1 percent. Manchester's proportion of residents with NVQ3 qualifications is also slightly above the wider averages.
- 3.7 However, it is also noted that the proportion of those with no qualifications is higher in Manchester (10.4 percent) than in Greater Manchester (8.3 percent) and England (6.4 percent). Therefore, while there are significant numbers of highly qualified people within the City, there are also significant numbers of people without any formal qualifications, which would have implications for access to employment. This range of qualification levels is recognised in Investing for Success (Manchester level) and

Places for Everyone (Greater Manchester level) and the need for economic growth and opportunities to be available to everyone.

Table 4 – Qualifications Attained (percentage)

Level of Attainment	Manchester City (%)	Greater Manchester (%)	England (%)
NVQ4+ and above	45.1	39.1	43.2
NVQ4+ and above	61.6	57.9	61.4
NVQ4+ and above	71.7	76.3	78.1
NVQ4+ and above	81.1	85.9	87.7
Other qualifications	8.5	5.7	5.9
No qualifications	10.4	8.3	6.4

Source: ONS Annual Population Survey, Jan 2021-Dec 2021

Employment Growth

- 3.8 The following section uses Business Register and Employment Survey (BRES) data to measure sectoral employment composition in Manchester. It should be noted that BRES data represents a sample survey of local employment, with figures rounded. As it is a national survey, smaller area information is subject to larger percentage errors and should be seen as representing broad trends only.
- 3.9 As of 2022 Manchester provide a total of 426,000 jobs. Figure 3 compares the growth of employment in Manchester with Greater Manchester and England (1,423,000 at 2022), over the 2018-2022 period with 2018 as the base year.
- 3.10 The Manchester area has had positive employment growth over the observed period, retaining jobs and employment for individuals during the 2020 Covid-19 pandemic which shows that the Greater Manchester region had a decline in employment, more in line with national trends. Growth for Manchester and the regional and national comparators has been at a similar rate since 2020.

Figure 3 – Growth of Employment (indexed 2018=100.0)



Source: BRES, 2024

- 3.11 Places for Everyone includes forecasts for Greater Manchester to 2039. The baseline scenario forecasts an additional 100,000 jobs in Greater Manchester above 2018 levels. An accelerated growth assumption suggests that Greater Manchester could increase jobs by approximately 170,000 above 2018 levels. Places for Everyone states that the majority of employment growth is expected in Salford, Manchester and Trafford.
- 3.12 The following table summarises the sectoral employment and growth rates in Manchester, Greater Manchester and England since 2018.
- 3.13 In 2022, professional, scientific and technical activities was the largest sector in Manchester, in terms of employment, with 59,000 jobs (13.8 percent). furthermore, this was also the sector which experienced the greatest absolute increase in employment between 2018-2022, gaining 11,000 workers in the five-year period.

Table 5 – Employment Change in Manchester, Greater Manchester & England, 2018-22

Sector	Manchester				Greater Manchester	England
	Jobs 2018	Jobs 2022	Change	Jobs change %	Jobs change %	Jobs change %
Agriculture, forestry and fishing	150	20	-130	-87	-40	0
Mining and quarrying	30	200	170	567	71	0
Manufacturing	11,000	12,000	1,000	9	-5	-3
Electricity, gas, steam etc	400	500	100	25	-58	-22
Water supply; sewerage, etc	800	1,000	200	25	0	9
Construction	8,000	9,000	1,000	13	19	8
Wholesale and retail trade	51,000	45,000	-6,000	-12	-8	-4
Transportation and storage	30,000	26,000	-4,000	-13	-16	8
Accommodation and food service activities	36,000	37,000	1,000	3	16	11
Information and communication	17,000	24,000	7,000	41	37	13
Financial and insurance activities	18,000	18,000	0	0	-2	1
Real estate activities	8,000	12,000	4,000	50	13	15
Professional, scientific and technical activities	48,000	59,000	11,000	23	37	10
Administrative and support service activities	49,000	50,000	1,000	2	-1	6
Public administration and defence	17,000	23,000	6,000	35	18	13
Education	39,000	40,000	1,000	3	2	0
Human health and social work activities	45,000	53,000	8,000	18	24	8
Arts, entertainment and recreation	7,000	7,000	0	0	-3	1
Other service activities	8,000	8,000	0	0	13	4
Total	393,380	424,720	31,340	701	115	78

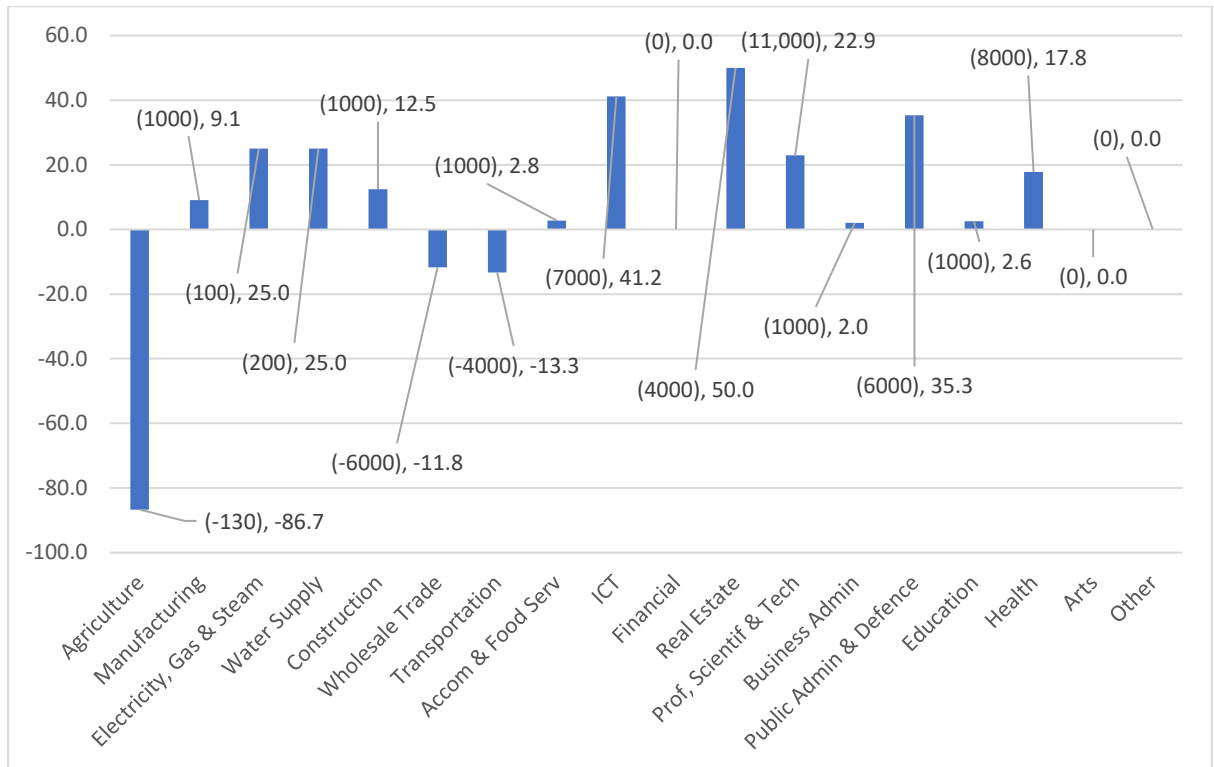
Source: BRES, 2024

- 3.14 Other large sectors in Manchester, in terms of employment numbers, include health (53,000 jobs) administrative and support service (50,000), and wholesale and retail trade (45,000 jobs). This highlights the functions of Manchester as a core services centre.

Growth and Decline of Sectors

- 3.15 Overall total employment in both Manchester and Greater Manchester increased between the years 2018-2022 by 31,340 and 94,850 jobs respectively. Figure 4 illustrates the percentage change in employment in Manchester, Greater Manchester and England.

Figure 4 – Sectoral Change in Employment, 2018-22 (percentage growth, excluding mining)



Source: BRES, 2024

*Number in brackets is number of businesses which were gained/lost

- 3.16 Large sectoral gains in employment were in the professional, scientific and technical services (+11,000 jobs, 22.9 percent), health (+8,000 jobs, 17.8 percent) and information and communication (+7,000 jobs, 41.2 percent) sectors. Excluding the mining sector, the real estate sector had the largest percentage increase (50.0 percent). Apart from health, these sectors are predominantly in E(g) office uses, although some of the professional, scientific and technical sector may take other unit types. Therefore, this has significant implications for employment floorspace demand.
- 3.17 Large sectoral declines were experienced in the wholesale and retail trade sector (-6,000 jobs, -11.8 percent) and the transportation sector (-4,000 jobs, -13.3 percent) over this period. Both of these sectors have a proportion of their jobs in industrial/ warehousing units, though the significant majority of the wholesale and retail sector is within retail units and transportation jobs are on a mix of warehousing units and drivers that may have no fixed employment unit associated with the job. Therefore, this has some implications for industrial/ warehousing land and premises demand in

Manchester. Offsetting this, there has been positive growth of 1,000 jobs in manufacturing

3.18 The private office sectors are:

- Information and communication technologies
- Business administration
- Professional, scientific and technical services
- Real estate activities
- Financial and insurance activities.

3.19 These sectors all saw employment growth between 2018 and 2022, except for financial and insurance activities which was estimated to be stagnant through this period. Therefore, overall there has been growing numbers in office-based sectors in Manchester.

3.20 Manufacturing, the key occupant of B2 general industry space, grew in employment in Manchester by an estimated 1,000 jobs (+9 percent) during this period, compared to small percentage declines in Greater Manchester (-5 percent) and England (-3 percent). Employment in manufacturing across the country has generally seen declines over several years as the economy continues to move towards a more serviced based economy. Growth in manufacturing in Manchester shows significant resilience in this sector, particularly over a period of significant wider economic instability.

Location Quotients

3.21 Location Quotients (LQ) are a measure of an area's specialisms within the local economy, relative to a regional or national comparator (in this case, England). Table 6 summarises the LQs for Manchester's sectors for 2022. LQs are a measure of an area's specialisms i.e. if a certain sector is more prevalent in the area than in the country as a whole. A score of 1.00 shows a sector performing at the same level as seen in England and a LQ above 1.00 infers that there is a higher concentration of employment in that sector in the local area, compared to the concentration in England as a whole.

3.22 The table also shows the growth rate in employment in each sector between 2018 and 2022. This data can highlight sectors that are more predominant in employment in

Manchester and that are growing faster than other sectors and thus represent strong sectors in the City.

- 3.23 For Manchester, sectors such as information and communication, real estate and professional, scientific and technical activities have a good degree of specialism in Manchester and are growing significantly.

Table 6 – Sectoral Location Quotients and Growth Rates

Industry	Manchester percentage change 2018-2022	Location Quotients	Total Employment
Agriculture	-86.67	0.01	20
Mining and quarrying	566.67	0.64	200
Manufacturing	9.09	0.38	12,000
Electricity	25.00	0.35	500
Water supply	25.00	0.33	1,000
Construction	12.50	0.44	9,000
Wholesale and retail trade	-11.76	0.75	45,000
Transportation and storage	-13.33	1.20	26,000
Accommodation and food service	2.78	1.10	37,000
ICT	41.18	1.19	24,000
Financial and insurance	0.00	1.27	18,000
Real estate activities	50.00	1.48	12,000
Professional, scientific and technical	22.92	1.48	59,000
Administrative and support service	2.04	1.28	50,000
Public administration and defence	35.29	1.25	23,000
Education	2.56	1.10	40,000
Health	17.78	0.95	53,000
Arts	0.00	0.70	7,000
Other industries	0.00	0.94	8,000

Source: BE Group analysis of ONS BRES data, 2024

- 3.24 Real estate activities and the professional, scientific and technical sectors had the highest degree of specialism compared to England with an LQ of 1.48 each, in addition to this total employment in the professional and scientific sectors was the largest. Sectors of financial and business administration also were high in LQ at 1.27 and 1.28 respectively.
- 3.25 Table 7 looks at an in-depth breakdown of the LQ of the professional, scientific and technical sectors. The LQ of Manchester compared to England illustrates the high concentration of office, professional and tech sectors in comparisons to Greater

Manchester. The high LQ of 2.09 and 2.24 can be seen in the legal and accounting activities. Conversely, the low LQ of 0.50 and 0.24 can be seen in the scientific research and development subsector. This has significant implications for development proposals that are targeting a strong scientific base for the focus of the development and suggests that recruitment may need to come from a wide area.

Table 7 – Location Quotients of Professional, Scientific and Technical Subsectors

Profession, Scientific and Technical Subsector	Manchester number of jobs, 2022	Greater Manchester number of jobs, 2022	England number of jobs, 2022	LQ (Man to Eng)	LQ (GM to Eng)
Information service activities	900	2,000	80,000	0.72	0.48
Financial service activities, except insurance and pension funding	10,000	17,000	406,000	1.57	0.80
Insurance, reinsurance and pension funding, except compulsory social security	2,250	6,000	83,000	1.72	1.38
Activities auxiliary to financial services and insurance activities	7,000	17,000	418,000	1.07	0.78
Real estate activities	12,000	26,000	520,000	1.47	0.95
Legal and accounting activities	23,000	82,000	699,000	2.09	2.24
Activities of head offices; management consultancy activities	15,000	30,000	799,000	1.19	0.72
Architectural and engineering activities; technical testing and analysis	13,000	31,000	480,000	1.72	1.23
Scientific research and development	1,250	2,000	159,000	0.50	0.24
Advertising and market research	4,500	8,000	173,000	1.65	0.88
Other professional, scientific and technical activities	2,500	8,000	170,000	0.94	0.90
Office administrative, office support and other business support activities	16,000	35,000	523,000	1.95	1.28

Source: BE Group analysis of BRES, 2024

- 3.26 The following table breaks down the manufacturing sector into different subsector classifications. Overall, manufacturing had a low LQ of 0.39 (meaning the proportion of employment in manufacturing in Manchester is only 39 percent of that across England). However, this is not uniform throughout the manufacturing sector in Manchester, as seen in the table below. Manufacturing of wearing apparel, beverages and electrical equipment are more in line with England averages.

Table 8 – Manufacturing Location Quotients in Manchester

Sector	Manchester number of jobs, 2022	Greater Manchester number of jobs, 2022	England number of jobs, 2022	LQ (Man to Eng)	LQ (GM to Eng)
Manufacture of food products	3,500	23,000	338,000	0.66	1.30
Manufacture of beverages	500	900	33,000	0.96	0.52
Manufacture of tobacco products	0	0	150	0.00	0.00
Manufacture of textiles	500	6,000	45,000	0.71	2.54
Manufacture of wearing apparel	300	700	19,000	1.00	0.70
Manufacture of leather and related products	0	15	7,000	0.00	0.04
Manufacture of wood and of products of wood and cork, except furniture; manufacture of articles of straw and plaiting materials	75	2,500	70,000	0.07	0.68
Manufacture of paper and paper products	150	2,500	43,000	0.22	1.11
Printing and reproduction of recorded media	175	3,000	67,000	0.17	0.85
Manufacture of coke and refined petroleum products	0	75	6,000	0.00	0.24
Manufacture of chemicals and chemical products	800	7,000	75,000	0.68	1.78
Manufacture of basic pharmaceutical products and pharmaceutical preparations	15	450	35,000	0.03	0.25
Manufacture of rubber and plastic products	800	9,000	129,000	0.39	1.33
Manufacture of other non-metallic mineral products	200	2,000	85,000	0.15	0.45
Manufacture of basic metals	250	1,750	53,000	0.30	0.63
Manufacture of fabricated metal products, except machinery and equipment	500	14,000	254,000	0.13	1.05
Manufacture of computer, electronic and optical products	400	4,000	88,000	0.29	0.87
Manufacture of electrical equipment	900	3,500	59,000	0.97	1.13
Manufacture of machinery and equipment n.e.c.	500	6,000	159,000	0.20	0.72
Manufacture of motor vehicles, trailers and semi-trailers	600	2,500	126,000	0.30	0.38
Manufacture of other transport equipment	250	3,000	109,000	0.15	0.52
Manufacture of furniture	175	2,500	74,000	0.15	0.64
Other manufacturing	600	2,500	60,000	0.64	0.79

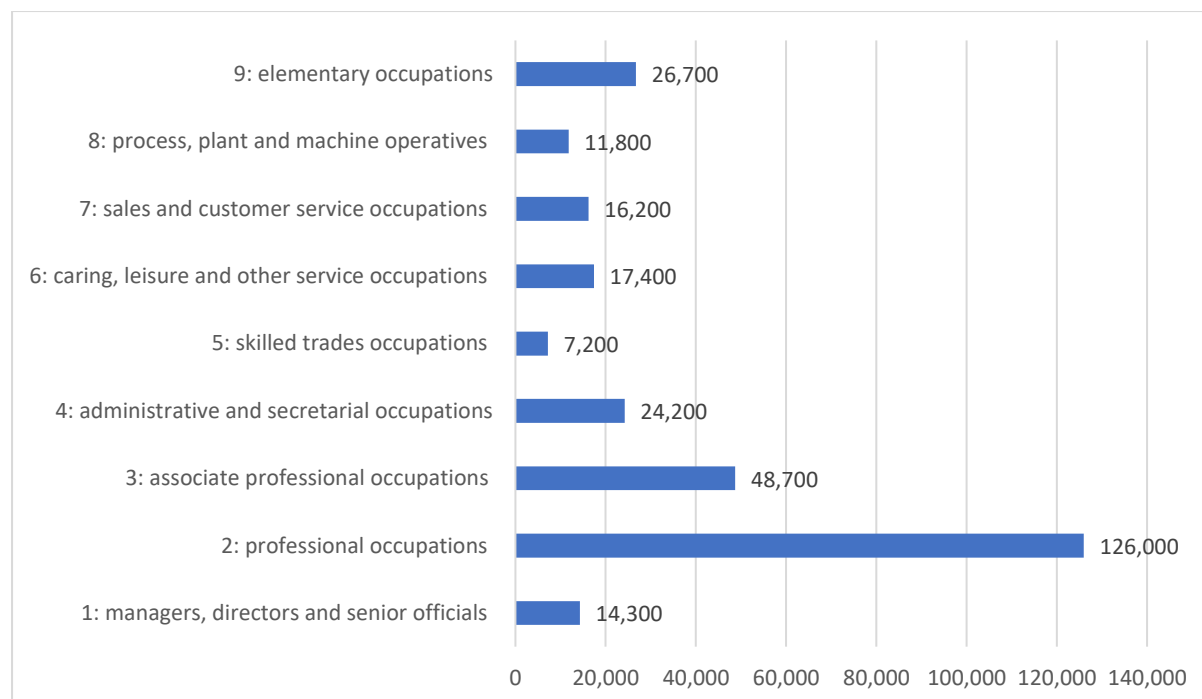
Source: BE Group analysis of BRES, 2024

Employment by Occupation

- 3.27 Figure 5 below shows the split of employment by occupation of residents in Manchester over October 2022 - September 2023. Those in professional occupations made up for 42.8 percent of the workforce, the highest proportion in Manchester, which is in line with the sectoral data provided above. Associate professional occupations made up for 16 percent of the workforce, the second highest in Manchester.

3.28 By comparison, professional occupations comprised 29.3 percent of occupations in Greater Manchester and 27.3 percent of occupations in England, which further highlights Manchester’s role in providing high-skilled occupations.

Figure 5 – Number of Workers by Occupation, Manchester



Source: Annual Population Survey, 2024

3.29 This highly skewed workforce to professional and associate professional occupations is reflective of Manchester’s position centrally located within the wider Greater Manchester area and the pre-eminence of the City Centre in the regional economy. This skewed nature of the residential workforce has implications for the types of jobs in demand but also the availability of locally residing labour for businesses in Manchester.

Number and Size of Businesses

3.30 ONS data identified that as of 2023 there were 23,385 VAT registered businesses operating in Manchester.

3.31 89.2 percent of businesses in England employed less than ten people (micro businesses) and 8.8 percent of businesses were classified as small (10-49 employees). Manchester broadly followed the national pattern, albeit with proportionately more small businesses against micro firms. Table 9 shows that 86.8

percent of businesses in Manchester employed less than ten people, while those registered as small businesses totalled 10.6 percent. On the larger businesses, there were 125 identified as having more than 250 employees. Businesses with more than 50 employees are significantly proportionally more represented in Manchester than in Greater Manchester and England.

Table 9 - UK Business Counts, 2023

Employment Size band	Manchester		Greater Manchester	England
	number	percent	Percent	percent
Micro (0 to 9)	19,815	86.8	88.4	89.2
Small (10 to 49)	2,440	10.6	9.5	8.8
Medium-sized (50 to 249)	450	3.7	1.6	1.6
Large (250+)	125	0.5	0.4	0.4
Total	22,835	100	100	100

Source: ONS, 2024

- 3.32 The total number of businesses can also be broken down by industry sector, as seen in Table 10.
- 3.33 The wholesale and retail sector accounted for the highest number of businesses in Manchester, 4,725 or 20.7 percent of businesses. This compares with this sector providing some 10.6 percent of jobs in the area, suggesting that this sector is comprised of many entities providing small numbers of jobs each (e.g. small retail outlets). The professional, scientific and technical sector accounted for the second largest number of businesses in Manchester at 18.4 percent of all local firms.

Table 10 – Business Counts by Sector, Manchester City

Industry	Number	Change 2018-22 (number)	Change 2018-22 (percentage)
Agriculture, forestry and fishing	25	0	0
Mining and quarrying	0	0	0
Manufacturing	745	10	1.4
Electricity, gas, steam	30	-10	-22.2
Water supply, sewerage, etc.	50	5	12.5
Construction	1,800	185	12.0
Wholesale and retail trade	4,725	-1,745	-24.7
Transportation and storage	955	60	6.3
Accommodation and food service	1,790	300	20.3
Information and communication	1,760	-40	-2.2
Financial and insurance	470	-15	-3.0
Real estate activities	1,255	150	13.8
Professional, scientific and technical	4,195	85	2.0
Administrative and support service	2,005	225	12.6
Public administration and defence	5	0	0
Education	400	75	22.7
Human health and social work	1,140	10	0.9
Arts, entertainment and recreation	565	80	17.6
Other activities	915	150	20.3

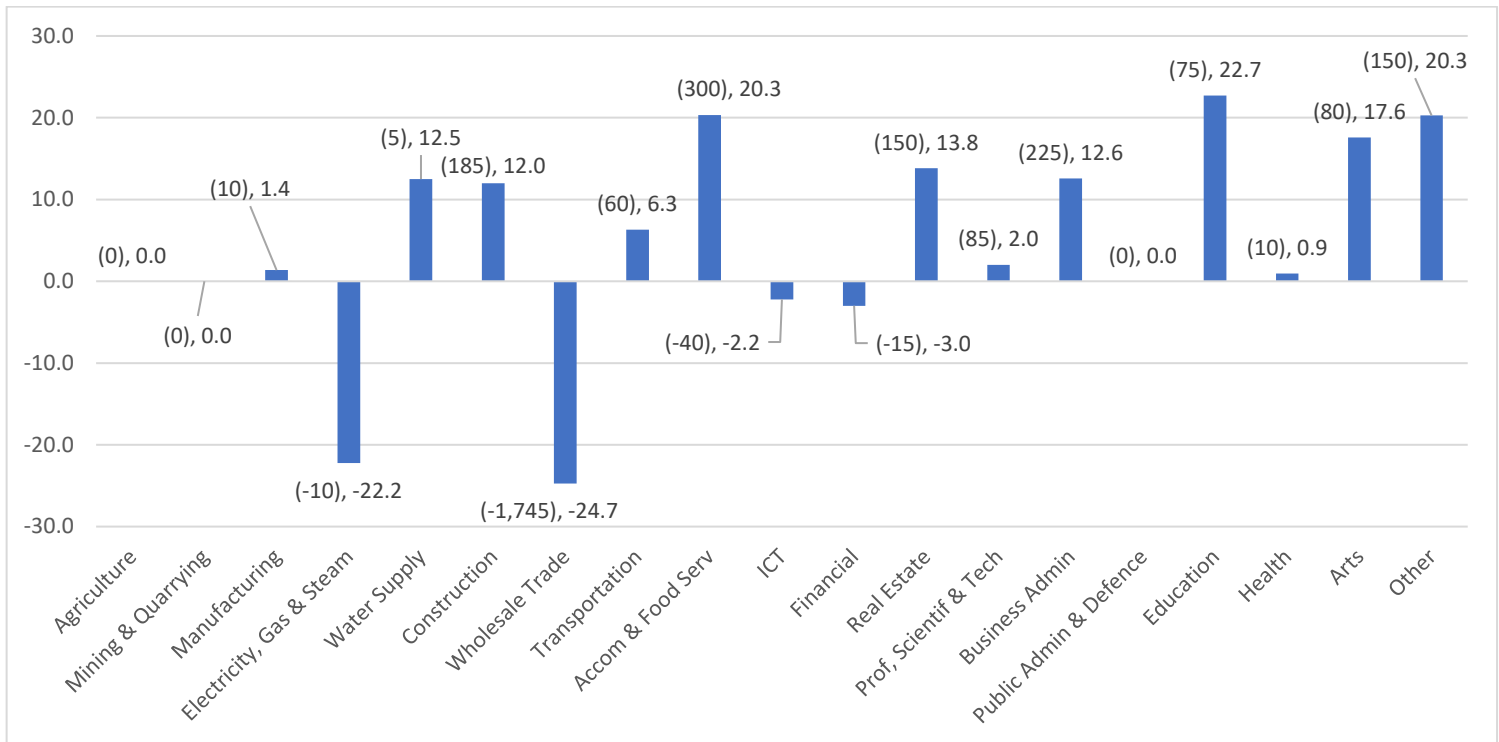
Source: ONS UK Business Counts, 2024

*Figures are rounded to 5 or 0 for anonymity of businesses in low amount.

Business change by sector

- 3.34 Figure 6 illustrates how the total number of businesses within each sector has fluctuated between 2018-2022. 2022 data is used here in order to allow a comparison between employment growth and business growth. Employment growth numbers come from BRES data, the latest of which is 2022.

Figure 6 – Business Count by sector 2018-2022



Source: Business Counts, 2024

*Number in brackets is number of businesses which were gained/lost

- 3.35 As with the jobs growth, the private office sectors had some of the biggest gains in business numbers, notably the business administration and the real estate sectors, meanwhile ICT and financial sectors lost businesses.
- 3.36 The wholesale and retail trade lost businesses and had the biggest loss over the time period, although remained the sector with the largest number of registered businesses overall in Manchester.
- 3.37 In comparison to the employment growth, the reduction of wholesale and retail trade sector in Manchester is consistent with the loss of employment. Most employment is within the retail sector, and the reduction can be attributed to factors such as Covid19, the overall pressures on the retail sector in recent years and the threat of online retailing. These pressures are observed throughout the nation.
- 3.38 Comparing the change in jobs and business numbers illustrates the following key trends:

- The Manchester area has good growth within the office economy, however the ICT sector has the least growth over the observation period.
- The wholesale and retail sector lost the most number of employees and businesses, a negative trend, which is consistent with the trends observed in England, though remains the largest sector in terms of business numbers.
- Manufacturing employment grew by about 1,000 jobs in Manchester, bucking national trends; however the number of manufacturing businesses grew by only 10 over the same period, suggesting growth is likely to be in the larger businesses.

Size of the Economy

- 3.39 Manchester's economy is the largest within the Greater Manchester area. Manchester's gross value added (GVA) was estimated by the ONS to be £28.38 billion in 2022, which represents some 34.8 percent of the GVA within Greater Manchester. Manchester's GVA has increased 47 percent since 2012, compared to 31 percent growth for Greater Manchester as a whole. The proportional growth in Manchester was the second highest in Greater Manchester, with only Salford (52 percent) growing at a faster rate over this period.
- 3.40 Manchester's GVA in 2022 of £28.38 billion is also the largest local authority GVA in the North West, significantly larger than surrounding areas, with Liverpool City the second largest economy at £15.04 billion in 2022. Manchester's GVA comprises 14 percent of the North West economy.
- 3.41 The table below summarises the growth of GVA throughout Greater Manchester and highlights the importance of Manchester in the region's economic growth. The following graph illustrates the growth.

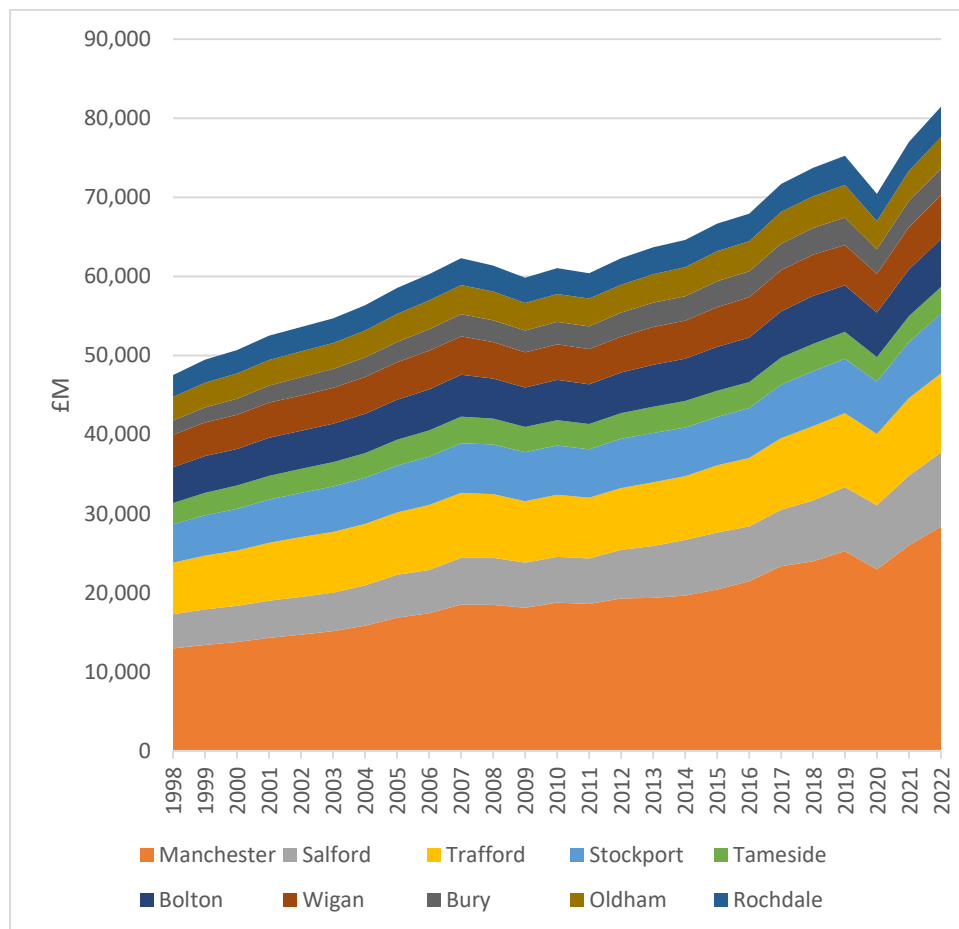
Table 11 – GVA Growth in Greater Manchester (£M)

Local Authority	GVA 1998 (£M)	GVA 2002 (£M)	GVA 2007 (£M)	GVA 2012 (£M)	GVA 2017 (£M)	GVA 2022 (£M)
Bolton	4,502	4,797	5,268	5,157	5,832	6,049
Bury	1,817	2,292	2,798	3,035	3,315	3,351
Manchester	12,961	14,708	18,495	19,255	23,363	28,380
Oldham	2,291	3,302	3,688	3,500	4,051	4,000
Rochdale	2,773	3,077	3,391	3,385	3,507	3,847
Salford	4,325	4,759	5,916	6,153	7,141	9,365
Stockport	4,852	5,604	6,284	6,244	6,754	7,593
Tameside	2,698	3,036	3,359	3,226	3,435	3,349
Trafford	6,519	7,560	8,225	7,833	9,058	9,973
Wigan	4,101	4,474	4,883	4,530	5,226	5,556
Greater Manchester	46,839	53,609	62,307	62,318	71,682	81,463

Source: ONS – Regional Gross Value Added

* Chained volume measures, 2019 money value

Figure 7– GVA Growth in Greater Manchester (£M)



Source: ONS – Regional Gross Value Added

* Chained volume measures, 2019 money value

Earnings by Place of Residence and Work

- 3.42 Table 12 shows that the earnings of the residents in Manchester when measured by place of work (£602), was lower than the Greater Manchester and England medians.

Table 12 – Earnings of Residents

Area	Gross Median Weekly Pay, £ (Analysis by place of work)	Gross Median Weekly Pay, £ (Analysis by place of residence)
Manchester	602.2	597.6
Greater Manchester	652.5	574.9
England	648.2	648.2

Source: ONS

- 3.43 When measuring the gross median weekly pay by place of residence, Manchester's median of £597.6 was slightly higher than Greater Manchester average but less than England's average.

Benefit Claimant Count

- 3.44 The following table provides a summary of the claimant counts in Manchester for October 2024 (not seasonally adjusted). As can be seen, the rate of claimant count is higher than for North West and Great Britain. This is further evidence that, while Manchester is a significant economic powerhouse and provides a wide range of employment types, there remains significant disparity in the workforce. Further provision of accessible employment options in Manchester would help to address this disparity.

Table 13 – Benefit Claimant Count

Age Group	Manchester		North West	Great Britain
	No.	%	%	%
All aged 16+ years	27,440	7.2	4.7	4.3
Aged 16-17	30	0.2	0.2	0.2
Aged 18-24	4,635	5.6	6.3	5.4
Aged 25-49	17,200	8.2	5.6	4.9
Aged 50+	5,575	7.1	3.1	3.2

Source: Nomis, ONS, 2024

- 3.45 The data shows that the most marked difference in percentages between Manchester and the wider comparator areas was in the 50+ years age group, with over double the

percentage in this age group claiming benefits compared to the North West and British averages.

Summary

- 3.46 This socio-economic and sectoral analysis has highlighted Manchester's preeminent economic position within the wider regional economy. Manchester has a high proportion of its population of a working age, which is projected to continue throughout the planning period. Manchester also has a large surrounding population within Greater Manchester upon which to draw workers and generate economic activity.
- 3.47 Manchester has a workforce mix that is highly skewed towards professional services, reflecting the economic strength of the City Centre within the region. However, this is not uniform for all professional services, with the scientific research sector relatively small compared to regional and national averages. This has implications for the development schemes looking to establish a scientific hub – there is a relatively lower economic base upon which to build, but also a market gap that could be exploited.
- 3.48 The manufacturing sector is relatively small in terms of proportional employment in Manchester, though has grown in employment numbers in recent years. The manufacturing subsectors of wearing apparel, beverages and electrical equipment seemed to be manufacturing strengths within the City, although only to levels comparable to the national averages.
- 3.49 Manchester is the main economic driver in Greater Manchester, accounting for over one-third of GVA output in the region. The City's GVA growth rate over the last decade has been higher than for Greater Manchester as a whole and second only to Salford. However, it is also recognised that Manchester has a higher rate of benefit claimants than the regional and national averages. Therefore, while there is considerable economic strength in Manchester, not all residents are benefiting from this.

4.0 PROPERTY MARKET CONTEXT

- 4.1 This chapter provides an overview of the office and industrial property markets in Manchester, based on published data and interviews with commercial agents active in the City.

Overview

- 4.2 Manchester City Centre is the primary node for employment for Greater Manchester and a key location for corporate enterprises in the national economy. Its excellent connectivity, substantial mass of employment spaces and major civic, education and cultural institutions means that it commands the prime occupiers and developer interest.
- 4.3 While traditionally an industrial powerhouse, Manchester's role has evolved over many decades with traditional manufacturing uses being pushed to fringe areas in Greater Manchester, or lost to more competitive areas, and employment within Manchester evolving to a more services-based economy. However, there remain significant industrial nodes within the City, including in City Centre fringe locations that are a product of the industrial heritage. Some of these remaining older industrial nodes have older built stock in need of renewal.

Office Market

Overview

- 4.4 The office market throughout the UK was significantly impacted by the pandemic and the imposed workplace restrictions, with office-based workers the main sector of the workforce able to continue working from home throughout the pandemic restriction periods. This led to many businesses reorienting how they operate, with continued home based and hybrid working arrangements post-pandemic. Such changes in workplace practices have impacted upon demand for office space, with businesses reassessing their size needs with for a hybrid workforce. However, there is also a desire from businesses to bring workers back into the office as much as possible and office spaces that are attractive to workers and well-connected are more likely to achieve this objective.
- 4.5 Therefore, the market is seeing growth in demand for smaller floorspaces, with high to very high amenities and fitout, that are well serviced by transport and surrounding

facilities. Therefore, city centre locations are well-positioned to take advantage of this trend, whereas traditional business park nodes are less so.

- 4.6 Manchester City Centre has seen continued office growth in recent years, including substantial developer interest for new build schemes to service solid occupier demand and significant refurbishment of existing office stock to Grade A quality in order to meet modern market expectations and environmental standards. However, developer interest in office nodes away from the City Centre is much more muted, with some UDP allocations being undeveloped for many years.
- 4.7 Another overarching trend in the office market is the substantially increasing costs of development, including land, materials, energy and labour costs. This has been a consequence of global supply chain issues and energy cost spikes in recent years. While construction inflation has moderated, with the annual inflation rate to March 2024 being 1.5 percent (ONS Construction price indices), compared to 8.9 percent for the previous 12-month period, construction costs remain a significant constraint for new development schemes, particularly offices. Further to this, the increasing expectation of high-quality premises and energy efficient buildings are putting additional pressures on development costs.
- 4.8 Prime office locations, which are in better market positions to charge higher rents, are better able to make development schemes viable, compared to more price-sensitive locations. Therefore, once again city centre locations, compared to business park locations are more attractive to the developer market at present.
- 4.9 Energy performance certificate (EPC) regulation changes to come into force in 2027 and 2030 will have impacts on the commercial property market and push landlords to improve the energy efficiencies of their buildings in order to be able to lease them out. In 2027, commercial buildings will need to have a minimum of a C rating in order to be leased and by 2030 commercial buildings will need a minimum of a B rating. Many older premises do not comply with these ratings and therefore will require significant refurbishments in order to remain available to the market for commercial space.
- 4.10 The take up of office floorspace in 2023 in Manchester was 942,000 sqft (87,500 sqm), which was 14 percent below the five-year average (1,095,000 sqft/ 102,000 sqm) (Knight Frank). The take-up in Q1 2024 was also below average at 179,000 sqft (16,600 sqm), though Q2 was significantly higher than the corresponding period in

2023 (90 percent higher at 332,000 sqft) and has pushed the first half of 2024 above the five-year average (Savills).

- 4.11 Radius Data Exchange information on office transactions shows that only 3 percent of transactions over the last five years were for sales, with the overwhelming number of transactions of office units being leasehold. About 87 percent of transacted floorspace in the last five years occurred in the City Centre.
- 4.12 Reflecting the move to smaller floorplates, Knight Frank reports that average office deal size in Manchester in 2023 was 4,260 sqft (396 sqm), which was the lowest since 2014.

City Centre

- 4.13 Manchester City Centre is the pre-eminent office market in Greater Manchester and the North West. It benefits from a substantial critical mass of office workspaces, excellent multi-modal public transport connectivity, high market profile, planning support at all levels and long-term corporate occupiers. The location of the University of Manchester and Manchester Metropolitan University at the edge of the City Centre has driven innovation and entrepreneurship, encouraging investment in digital technology, life sciences, creative, biotechnology and advanced materials. Significant investments in these sectors include the Sister scheme (a partnership between Bruntwood SciTech and the University of Manchester), the growth of the digital and creative hub at Circle Square and the location of the UK Biobank at Manchester Science Park.
- 4.14 The greatest concentration of jobs in Greater Manchester is in the City Centre and immediate surrounding areas. The Greater Manchester Independent Prosperity Review (2019) reported that the Regional Centre (extending to Salford Quays and Sportcity) has about one in five jobs within Greater Manchester. Furthermore, its growth in employment has out-performed regional averages. The City Centre workforce is anticipated to continue to increase by about 65,000 jobs to 2040 to about 315,000 jobs. This requires substantial further investment in workplaces to provide for this growth.
- 4.15 The primacy of the City Centre in the region and its recent growth are reflected in rent levels being achieved for new schemes. Prime rents in the City Centre in 2023 were

£43/sqft and have risen to £45/sqft in 2024. The City Centre has a significant price point premium over other areas in Manchester and the broader region.

4.16 Some key deals have occurred in 2024, including:

- BNY (Bank of New York Mellon Corporation) securing a substantial 200,000 sqft (18,600 sqm) building as a single occupier at 4 Angel Square, NOMA
- Arm leasing 68,860 sqft (6,400 sqm) at 1 St Michael's
- Cubo letting 59,000 sqft (5,500 sqm) at No. 1 Spinningfields
- Atkins letting 38,000 sqft (3,500 sqm) at 3 Piccadilly Place
- Gilbanks leasing 22,900 sqft (2,100 sqm) at 1 St Michael's
- DAC Beachcroft taking 13,200 sqft (1,200 sqm) at Landmark

4.17 The BNY in Q3 2024 is a very large deal for the City Centre market, with Savills forecasting that it will allow the Manchester market to reach a post-covid annual peak of about 1.2 million sqft by the end of the year. The DAC Beachcroft move from larger offices in Spinningfields is an example of a move to smaller, but very high-quality premises, to allow for flexibility for its workforce and to meet sustainability goals. The Arm deal represents an example of an innovative, high-technology business expanding their presence in the City Centre, as they are a leading microchip designer.

4.18 Schemes currently under construction or in planning in the City Centre include:

- **Circle Square:** the first two buildings have been constructed and are operational, with No. 3 Circle Square expected to open in 2025. Close to the universities, Circle Square is a digital technology, creative and innovative hub.
- **NOMA:** hub in the north of the City Centre near to Manchester Victoria Station. Several office buildings are built and operational, including new build and refurbished spaces. The BNY deal takes 4 Angel Square to be completed in 2026 and the main component of new build space in this area.
- **Sister (formerly ID Manchester):** joint venture between Bruntwood SciTech and the University of Manchester. Research and innovation space, the first building opened in September 2024 (Renold Building), which is a 110,000 sqft incubator for start-ups. The Sister scheme will ultimately comprise some 4 million sqft of office, research and innovation space and provide specialist workspace for digital tech, health innovation, biotechnology, advanced materials, and manufacturing.

- **Mayfield:** brownfield regeneration site alongside Manchester Piccadilly Station to comprise leisure, office and residential uses beside Mayfield Park. The scheme is a public private partnership between Manchester City Council, Transport for Greater Manchester, LandSec, U+I and LCR. Office elements have not begun construction, but reportedly to comprise some 2.3 million sqft of office space.
- **Enterprise City (St John's):** media and creative hub comprising about 560,000 sqft of new build and refurbished space.
- **St Michael's:** phase one is fully let and phase two is under construction, to include some 72,000 sqft of office accommodation, as well as a five-star hotel and serviced apartments.

4.19 The 2024 deals and the projects under construction represent considerable confidence in the Manchester City Centre market, including recognition nationally and globally. However, it has been noted by commercial agents that further significant schemes are not in the pipeline to provide for the next phase of growth in the market. There is the potential for there to be constraints in the market about 2027 as the under-construction schemes are taken up and further stock does not become available.

4.20 Manchester City Council recognise the need for continued growth of the City Centre, including enabling substantial growth of employment workspaces to maintain and enhance the City Centre's pre-eminent role. As such, the City Council have proposed to expand the City Centre boundaries.

Office Agent Comments

4.21 Comments from commercial office agents in the market include:

- Manchester has massively changed over the past 20 years in terms of its office market and is a sophisticated and vibrant market now.
- The City Centre office market is not a single market, with new emerging developments having their own identity, market and character – e.g. Spinningfields, Circle Square, Embankment, New Bailey, NOMA areas.
- Take up in the City Centre is generally churn of occupiers, with businesses increasing or decreasing their floorplate needs.
- There is a clear trend for premises that provide improved energy efficiencies and help businesses meet net zero targets. New builds that minimise

embedded carbon in the build, fitout and usage of the buildings are in high demand.

- The City Centre still has an attractive, 'cool' image that helps to attract and retain labour. Furthermore, the city's global profile via football and its universities is a key attractive feature.
- Viability issues remain a concern, even for prime products. Currently the market is at rents of £43/sqft, though will need to move to about £50/sqft to make high-quality new builds viable.
- The Ring Road around the City Centre is somewhat of a perception barrier for the office market, though this is softening.
- Overall take-up of floorspace has lessened in recent times, though the number of transactions is about the same. Businesses are taking smaller floorplates post-pandemic.
- Coming changes to EPC regulations will impact on older stock, some premises will not be lettable unless they improve their EPC rating. This is a significant concern for the secondary and tertiary office markets and does not appear to be being addressed by landholders.
- Rent growth is occurring but for secondary and tertiary markets, which are more price-sensitive there are issues in charging sufficient rent to fund refurbishments and energy improvements.
- Some conversions of offices to residential is occurring in the market.
- Lab space is an increasingly important part of the office sector and needs to be supported.
- Generally, there is a movement to quality, while floorspace sizes are decreasing, quality demand is increasing.
- Opportunities for tech businesses in and around Wythenshawe with excellent fibre capacity.
- Fibre is incredibly important for businesses and a key initial question in assessing alternative premises. There are significant geographic differences in Manchester in terms of fibre network and further investment is needed.
- South Manchester has remained relatively steady in terms of office take-up over the last decade, but City Centre has seen strong growth, albeit this has tapered recently. Overall, this trend of stronger growth in the City Centre and steadiness in South Manchester is expected to continue.

- Mayfield, ID Manchester (now Sister) and Circle Square are likely to be the main areas of office interest in near term. Following these areas, there would need to be significant masterplanning of further areas to provide for next wave of office stock.
- Manchester is still limited by east-west transport options to connect to Liverpool and Leeds.

Industrial Market

- 4.22 The industrial/warehousing market throughout the UK performed significantly better than the office market through the pandemic period. While office space was impacted by homeworking and hybrid working, the manufacturing and logistics sectors remained operating throughout the pandemic period. Furthermore, the logistics market saw a significant spike in demand as more retailing was undertaken online. While this trend has moderated, the post-pandemic retail environment includes an increased share of spend online, which has implications for demand for logistics and warehousing units.
- 4.23 The industrial market in Manchester saw an increase in vacancy rates through 2023 to 6.7 percent, though this remains relatively low and is anticipated to have peaked (Savills).
- 4.24 Radius Data Exchange information on industrial transactions (lettings and occupational sales) shows that some 419,000 sqm of industrial floorspace was transacted in Manchester over the last five years (average of 84,000 sqm). The bulk of this is churn of existing stock.
- 4.25 Manchester's industrial take-up levels returned to more moderate levels, following strong take up during the pandemic period. Manchester's industrial take-up has been limited by the lack of premises in the market, particularly the lack of high-quality spaces. Similar to the office market, the Grade A stock has seen the most interest in the market, with a clear movement towards quality of premises.
- 4.26 Comments from industrial agents in the market include:
- There is market interest in building industrial units speculatively in the North West, with sufficient interest in the small to mid-size markets.
 - There is an increasing expectation for units with EPC A and BREEAM Excellent ratings.

- There is a significant shortage of high-quality industrial units in the market, particularly for SMEs.
- Have not seen urban logistics demand providing 'last mile' logistics, but this could occur with an increasing residential population in and around the City Centre. The market could emerge to having hubs on the edge of the City Centre to the residential and worker populations.
- There has been difficulty securing funding for projects over the past year.
- Typically, institutional investors are looking at projects in excess of 5 acres for a minimum build of about 90,000 sqft. Smaller projects are unlikely to secure institutional investment and would need to source funding elsewhere.
- Canmoor's Lowry Park scheme in Central Park has seen encouraging interest in the smaller units. Expected to achieve rents from £11.50-17/sqft depending on size.
- There remains consistent and good demand for industrial premises in Manchester, with the lack supply, particularly quality premises limiting take-up. However, the market has cooled in 2024, with some voids increasing and more incentives required to secure tenants.
- Industrial demand has not been impacted in the same way as the office sector, with the industrial sector remaining resilient. However, increased build costs are also impacting on the developer appetite in the industrial sector.
- Rents achieved for smaller stock (<2,000 sqft) are about £6-8/sqft for second hand stock and £10/sqft for quality premises.

5.0 EMPLOYMENT LAND ASSESSMENT APPROACH

- 5.1 The following chapters review the key employment nodes within Manchester to identify potential further employment growth opportunities within each area. The growth opportunities analysis focuses on E(g), B2 and B8 uses.
- 5.2 Each area has been assessed from policy, spatial and market perspectives. The policies and strategies relevant to each area have been reviewed, with the implications for the area highlighted. The assessment has had regard to any masterplanning or strategic intent for the sites. The review provides commentary on the current functions and performance of each employment area and the distribution of uses and spatial differences within the boundary. Key subareas have been identified and reviewed, identifying opportunities for development, regeneration potential and specific sites for growth.
- 5.3 The review provides commentary on the development potential for each area, including the scale of land that could be developed for employment uses. This land could be greenfield land, derelict brownfield land or brownfield land that is currently being used, but over the course of the planning period could be redeveloped. Where appropriate, indicative floorspace estimates of potential reuses of land have been provided, based on potential development densities and having regard to Council's Employment Land Supply database. Development densities can vary substantially, particularly in large cities. For standard industrial estate and business park areas, densities of about 4,000 sqm/ha have been adopted. However, higher densities have been adopted in near-city centre locations or areas that support a higher concentration of uses, recognising that employment floorspace provision in such locations is likely to be predominantly multi-storey office space.
- 5.4 Sites that have been reviewed are:

Core Growth Areas

- Holt Town Strategic Regeneration Framework Area
- Eastlands Strategic Employment Location
- Central Park Strategic Employment Location

Inner Areas

- Strangeways Economic Improvement Area
- North Manchester General Hospital

Southern Areas

- Airport City Strategic Employment Location
- University Hospital South Manchester Strategic Employment Location
- Roundthorn Economic Improvement Area
- Sharston Economic Improvement Area

5.5 In addition to the above, the retained Unitary Development Plan Employment Allocations have been reviewed at a higher level to ascertain the potential for further employment land redevelopment opportunities from these sites.

6.0 HOLT TOWN NEIGHBOURHOOD DEVELOPMENT FRAMEWORK AREA

Relevant Policy Documents

- 6.1 The following table provides the summaries of the relevant policies and documents specific to Holt Town.

Table 14 – Policies and Documents – Holt Town

Document	Comments
Places for Everyone Joint Development Plan	<p>Holt Town is located within Places for Everyone's Core Growth Area within Greater Manchester, centred on the City Centre but also extending to Central Park and Sportcity and Etihad campus in the east and Trafford Park and Port Salford in the west. The document identifies this area as of a huge scale and diversity of economic and residential opportunities, which is accessible from Greater Manchester and wider.</p> <p>Policy JP-Strat1 states that the economic role of the Core Growth Area will be protected and enhanced, supporting major growth in the number of jobs. 'Complementary to, but not at the expense of, its economic function it will see a significant increase in the number and range of homes in areas with good connections to employment, training and education facilities.'</p> <p>The western part of the Holt Town Neighbourhood Development Area is within the expanded City Centre boundary within Places for Everyone (Policy JP-Strat2). This policy states that the 'City Centre will continue to provide the primary focus for business, retail, leisure, culture and tourism activity in Greater Manchester, but the increasingly important residential role of the City Centre will be expanded. Development will generally be high density.'</p>
Manchester Core Strategy 2012 to 2027	<p>The Core Strategy identifies Holt Town as part of the broader Strategic Housing Location (Policy H2), which is the 'key location for new residential development throughout the plan period'.</p> <p>It also identifies the western areas of Holt Town as part of the broader City Centre Fringe area in Figure 8.2 City Centre and Fringe.</p>
Holt Town A New Woodland Town in the City – Neighbourhood Development Framework, 2025	<p>The Holt Town Neighbourhood Development Framework (NDF) was approved in January 2025, following the consultation period closing in September 2024. The vision for Holt Town in the NDF is to 'regrow the community like a woodland' with the narrative of the NDF vision presented in terms of the components of a woodland, including:</p> <p>Roots: 'Holt Town's regeneration will reconnect this part of Manchester, bridging key areas. It will embed social value, retain heritage assets where possible, and aim to meet net zero targets.'</p> <p>Ground: 'Holt Town will create sustainable public spaces with enhanced biodiversity and infrastructure. It will promote low car usage, prioritise pedestrians, and integrate community and culture.'</p> <p>Understorey: 'A low-carbon town which includes a diverse range of lower-rise homes. It will promote economic growth with homes varied tenure and lower density family homes, supported by social infrastructure'. It will aim to deliver 4,500 homes, promote economic growth with mixed-use spaces and low-scale development.</p> <p>Canopy: "A creative approach to roofscapes that embraces the full potential for amenity, energy production and rainwater management.</p>

Document	Comments
	<p>Holt Town will celebrate its roof lines, creating views and vistas through careful distribution of scale, “ Emergent: ‘Holt Town is aiming for an appropriate density and scale. Higher density developments will be sensitively placed in areas where a greater density of accommodation could lead to a more generous contribution to public realm and/or the renewal of heritage assets’. This will help ensure a pedestrian-friendly environment.’</p> <p>Importantly for this Employment Land Review, the vision for the NDF promotes economic growth through mixed-use spaces and low-scale development, while envisioning some 4,500 additional homes, reflecting the overall scale and intend mix for Holt Town.</p> <p>The Objectives within the NDF provide further detail on the overall intents for Holt Town, including the provision of about 30,000 sqm of commercial space, generating about 1,500 jobs. This is to support the creative and entrepreneurial sectors and could also accommodate a variety of businesses at different scales, supporting ground floor active frontages, live-work spaces, and smaller format office floorspace, with a cluster established to incubate embryonic businesses and encourage economic agglomeration.</p> <p>The NDF envisages Holt Town as a pioneering mixed-use, residential-led neighbourhood. Of the 4,500 new dwellings, the aim is for 20% affordable homes.</p> <p>A variety of uses are proposed, enhancing Holt Town’s “existing ecosystem of businesses and its network of creative and social enterprises.” Opportunities include the clustering of commercial and creative uses along the area called the Ridge, along the southern edge of the canal.’</p> <p>The NDF identifies five character areas for Holt Town – Plateau, Ridge, Terraces, Embankment and Valley. The existing and potential employment issues and opportunities for each of these areas are discussed later in this chapter.</p>
Holt Town Neighbourhood Development Framework – Draft Baseline Report, Turley	<p>This report informed the development of the NDF. It assessed the socio-economic, housing, business, retail and social infrastructure baseline conditions to highlight the drivers for change within Holt Town. The report includes opportunities for potential growth, that could be realised through the Neighbourhood Development Framework, including:</p> <ul style="list-style-type: none"> • Opportunity for a mix of housing types to support a young and dynamic population close to the City Centre, but also to enable households to stay for longer as their housing needs change • Capacity analysis suggested that Holt Town could provide 4,682 homes comprising 9,362 residents • Some 3,000 sqm (gross) of retail and F&B uses could be supported • Opportunity for a diverse range of growing and highly productive commercial uses, including retention of existing businesses, nurturing the creative industries cluster, digital and tech, small scale office accommodation, financial and professional services, hybrid office/lab and net zero tech • Foundational retail, healthcare and education • Land analysis suggested that about 26,000 sqm of new employment space could be provided.

Document	Comments
Eastlands Regeneration Framework, 2019 Update	<p>This Regeneration Framework has now been superseded by the NDF, though it does still provide context on the evolution of the planning in this area. The study stated that the robust economic growth in the Eastlands area, as well as the significant growth in business startups, was driving demand for new commercial floorspace. Holt Town was named, alongside Ancoats and New Islington, as an area that is ‘becoming increasingly established as locations for small, medium and large-scale creative, digital and tech-based companies’</p> <p>It was also stated that ‘There are emerging demands for space within the area not only for small businesses throughout the creative technology sector but new demand from larger businesses which can sustain new commercial development in the Eastlands area.’</p> <p>The study gave some contextual information regarding Holt Town, stating ‘Holt Town has experienced significant growth in the reuse of existing mill and light industrial space to support the growth and expansion of businesses who operate within the creative, digital and tech sector. The pricing of these buildings has been key to attracting these businesses.’</p>

Source: BE Group commentary on above documents

Spatial Overview

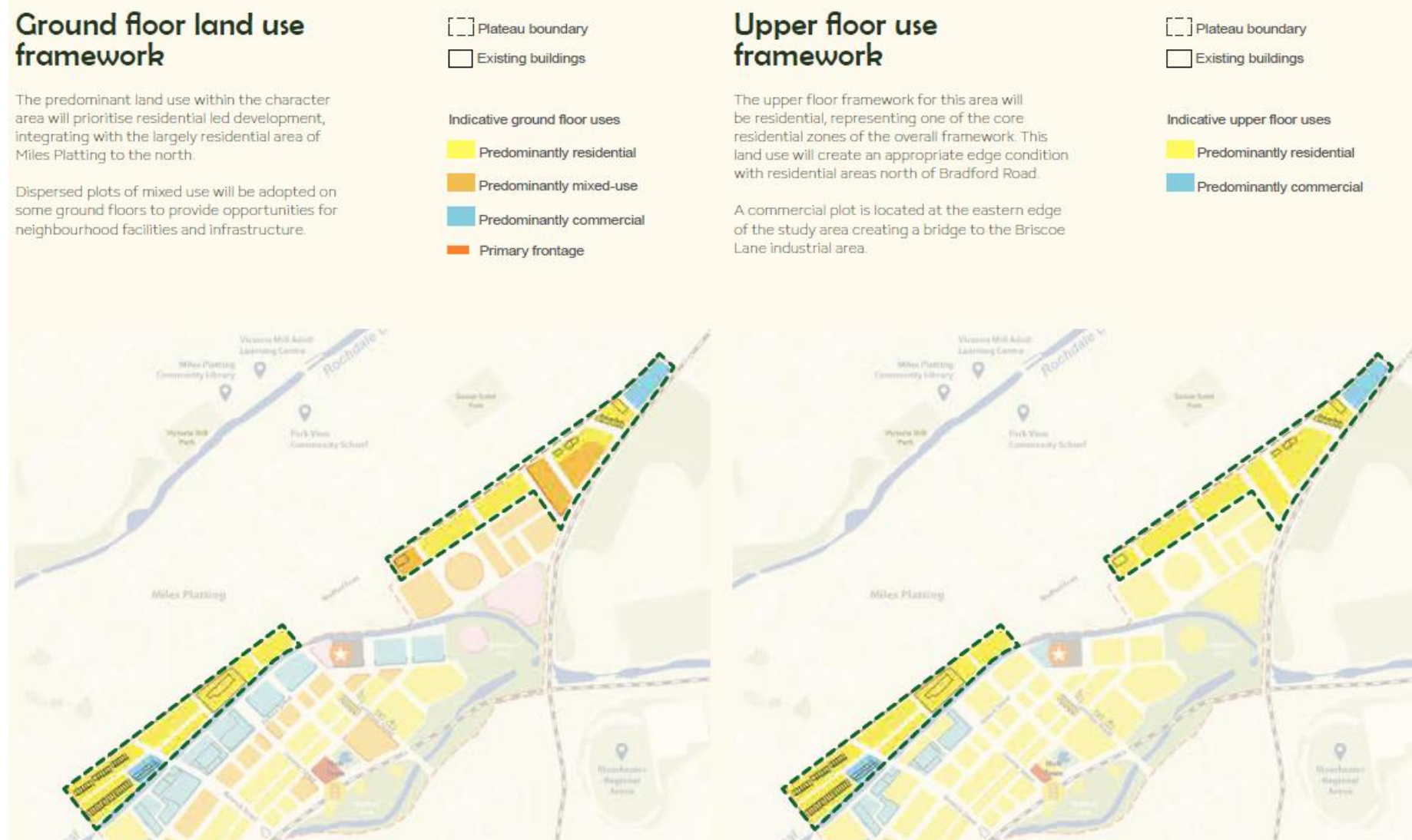
- 6.2 Figure 8 illustrates the character areas identified in the NDF, with Figures 9 to 12 illustrating the indicative use types for each character area throughout Holt Town for the ground and upper floors.

Figure 8 – Holt Town Character Areas – Neighbourhood Development Framework



Source: Holt Town A New Woodland Town in the City – Neighbourhood Development Framework, 2025 (Figure 36)

Figure 9 – Holt Town Neighbourhood Development Framework – Plateau Illustrative Uses



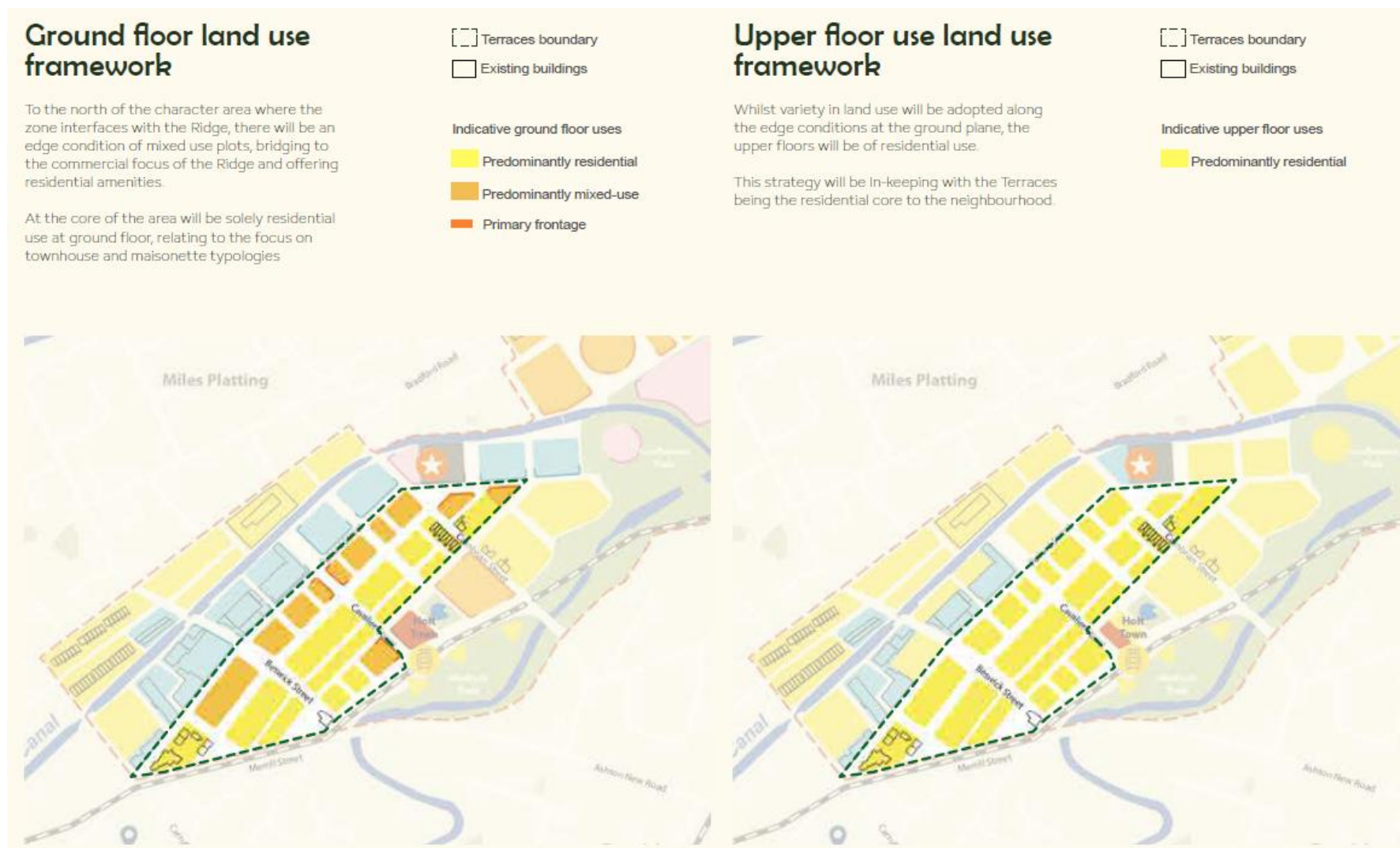
Source: Holt Town A New Woodland Town in the City – Neighbourhood Development Framework, 2025 (Figures 42 and 43)

Figure 10 – Holt Town Neighbourhood Development Framework – Ridge Illustrative Uses



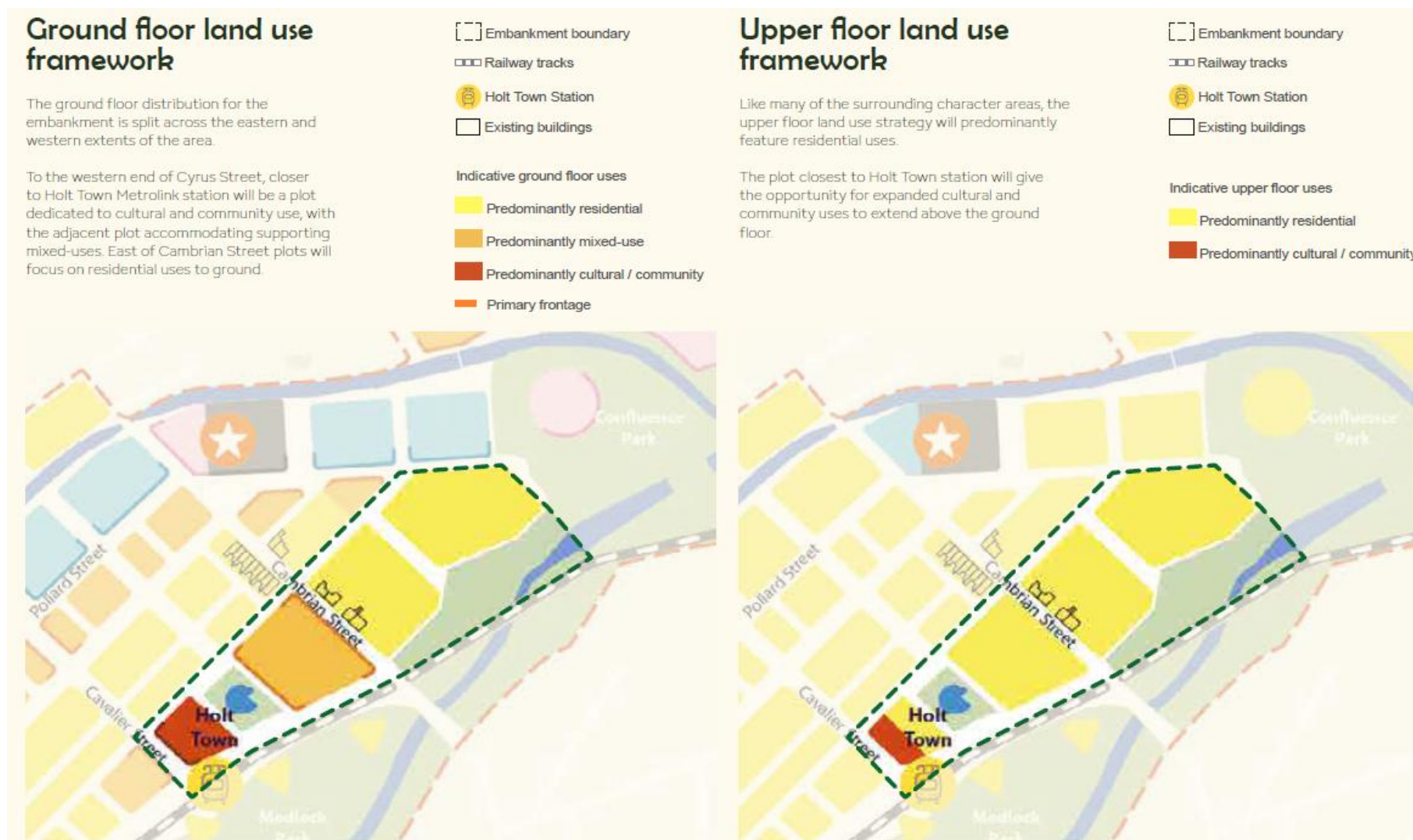
Source: Holt Town A New Woodland Town in the City – Neighbourhood Development Framework, 2025 (Figures 51 and 52)

Figure 11 – Holt Town Neighbourhood Development Framework – Terraces Illustrative Uses



Source: Holt Town A New Woodland Town in the City – Neighbourhood Development Framework, 2025 (Figures 61 and 62)

Figure 12 – Holt Town Neighbourhood Development Framework – Embankment Illustrative Uses



Source: Holt Town A New Woodland Town in the City – Neighbourhood Development Framework, 2025 (Figures 71 and 72)

- 6.3 Holt Town comprises a mix of employment locations, including repurposed mills, basic and moderate industrial units, temporary units and outdoor storage. It is attracting occupiers seeking affordable employment spaces in a location that is in close proximity to the centre of Manchester. The area has a number of statutory listed buildings lining Ashton Canal. These mills are distinguishing features of the area that are a reminder of Manchester's historic cotton and textile industries.
- 6.4 Hope Mill and Wellington Mill are examples of these buildings and the spaces within are being renewed to provide small workshop and studio spaces for Holt Town's thriving creative cluster. Additionally, Pollard Yard, a provider of workspaces within renovated shipping containers, has proven popular with creative businesses and with low rents (£1.5-£2/sqft or £16-22/sqm) can encourage start up and small businesses in the creative sector to the area.
- 6.5 From a review of current occupiers and their nominated Standard Industrial Classification (SIC) codes within Companies House, it is evident that within Holt Town's creative cluster, businesses involved in visual and audio media production are particularly prevalent, along with makers of handmade products including ceramics, textiles and cosmetics and operators of e-commerce businesses. Artistic uses include the Hope Mill Theatre boasting a capacity of 145 seats along with an offer of rehearsal rooms. Other arts studio spaces are found elsewhere within Hope Mill and also Wellington House.
- 6.6 The Boohoo Group is the largest employer in the area, with the office headquarters for PrettyLittleThing located within Wellington Mill and offices for BoohooMAN across the road in 20 Pollard Street. This is a significant asset to the area which should be maintained and built upon.
- 6.7 The focus of the creative sector, including the Boohoo Group, is along Pollard Street and Pollard Street East.
- 6.8 The area also includes a significant number of residential dwellings, close to central Manchester including a mix of apartment blocks and terraced housing of varying age and quality. There has been recent interest in the area from the residential market with permission being granted in April 2022 for the delivery of 277 apartments within and adjacent to Brunswick Mill. A tram stop is located within Holt Town, which would increase the attractiveness of the area for residents and businesses.

- 6.9 To the east of Cambrian Street, Holt Town has more basic industrial uses including a number of motor trade operators along with plots in use for outdoor storage while further north-east there is a disused gasworks along with a mixture of B-class and residential uses.
- 6.10 Holt Town does have some good key plots of vacant, undeveloped land that constitute strong development prospects, though unlikely that all would be for employment uses. Additionally, Holt Town has a high proportion of land ownership by Manchester City Council, giving the Council the leverage to drive redevelopment of the area.

Employment Land

- 6.11 The table overleaf provides an assessment of the five character areas identified within the Holt Town Neighbourhood Development Framework. The table looks at these areas in terms of existing employment, intents proposed within the NDF and employment opportunities consistent with the NDF.

Table 15 – Holt Town Use Classes

Description	Use Class	Number of Properties
Warehouse/Storage	B8	98
Factory/Manufacturing/Light Industrial	B2/E(g)(iii)	48
Office	E(g)(i)	81
Retail	E(a,b)	9
Fast Food Outlet/Takeaway	Sui generis	1

Sources: Nimbus using Ordnance Survey data, 2024

* excluding non-classified and ancillary uses (e.g. bus shelters, electricity sub-station, etc.)

Table 16 – Employment Land Assessment, Holt Town

Site Name/ Address	Baseline Employment Land (ha)	Description	Constraints	Planning Applications/ Permissions	Development Opportunities	Realistic Employment Land Supply, ha	Recommendations
Plateau	From NDF (approx. areas): Predominantly commercial: GF: 0.4 ha UFs: 0.4 ha Predominantly mixed-use: GF: 0.8 ha UFs: 0	Identified in the NDF as defining ‘the transitional character of the strip of land nestled between Bradford Road and the Ashton Canal. It has the potential to invite a sequence of lower-rise buildings that enhance the relationship with Miles Platting and nurture a harmonious interface along Bradford Road.’ This area includes Brunswick Mill and adjacent vacant land on the north bank of Ashton Canal, which has planning permission for a mixed-use development. Alongside this site are older workshops and outdoor storage, which given its canalside location could also see regeneration.	Listed buildings	Brunswick Mill site gained permission (130395/LO/2021) in April 2022 for the refurbishment of Brunswick Mill to provide 153 apartments and 20,981 sqft of commercial space including workspaces, retail and community uses. The same application also saw permission granted on the vacant plot, for 2 new apartment blocks, providing 124 apartments and 1,584 sqft of commercial space	The NDF’s intent for this character area is for a predominantly residential area. Any commercial uses are likely to be supporting the residential characteristics of this area and not focused on employment uses.	Sites for near-term intensification: 0.63 ha (part of Brunswick Mill site for commercial uses) 0.3 ha west of Brunswick Mill for more intensive uses. Remaining areas to be developed in longer term in accordance with NDF.	The older workshops and outdoor storage uses would need to be accommodated elsewhere, with opportunities elsewhere in East Manchester, if possible.
Ridge	From NDF (approx. areas): Predominantly commercial: GF: 3.2 ha UFs: 0.7 ha Predominantly mixed-use: GF: 2.7 ha UFs: 0	The NDF identifies the Ridge as the focus of commercial activities in Holt Town. The document states that the Ridge is the ‘bridge between the City Centre and Sportcity and the Etihad Campus. It is the heart of businesses, creativity and entrepreneurship at Holt Town. Enhancements to the canal towpath and improved access to the waterfront create opportunities for residents and visitors to re-engage with the water.” This area includes a cluster of creative and artistic uses in former mill and more modern units, as well as some more traditional industrial premises.	Listed buildings	Ancoats Works site received approval (122809/FO/2019) in 2019 for BooHoo Group to build 65,000 sqft of office space for their PrettyLittleThing HQ. However, these plans have since been shelved as the BooHoo backed Kamani Property Group along with	The NDF states that this ‘location is an opportunity to deliver high-density commercially led uses that build upon the existing character of the southern side of the Ashton Canal.’ Importantly, the creative cluster, particularly supporting the textiles sector, should be supported and enhanced. This cluster has emerged	Sites for near-term intensification: 0.77 ha at Pollard Yard potential for near-term intensification. Remaining areas to be developed in longer term in	Council and other stakeholders should work with current businesses to understand future space needs and means of retaining creative enterprises, including through incubator spaces, shared spaces, low-cost studios and workshops.

Site Name/ Address	Baseline Employment Land (ha)	Description	Constraints	Planning Applications/ Permissions	Development Opportunities	Realistic Employment Land Supply, ha	Recommendations
		<p>Some regeneration and repurposing of the mills has occurred in this area, including Phoenix Mill converted to small workspace units, Hope Mill as a creative and theatre hub, Spectator Mill and adjacent uses as workshops, gym and textiles merchants and Wellington Mill used for offices, workshops, event spaces, light industrial, serviced offices and studios.</p> <p>There is a strong creative cluster in this area, predominantly textiles-based but also arts and performance. This creative cluster is multifaceted and includes manufacturing, studios, offices and performance/event space.</p> <p>Temporary/modular uses are evident at Pollard Yard, providing shipping containers as a creative workshop hub, which is seeing good occupancy levels.</p>		Capital and Centric have applied for the development of 183 apartments and 10 duplexes on site, with the application approved.	<p>in this location due to the inexpensive and interesting spaces and proximity to the City Centre. Development and regeneration of this area should not price out the existing occupiers and use types.</p> <p>This sector would require a variety of spaces, including studios, workshops, offices, shared spaces and start-up spaces.</p>	accordance with NDF.	
Terraces	<p>From NDF (approx. areas):</p> <p>Predominantly commercial: 0</p> <p>Predominantly mixed-use: GF: 2.0 ha UFs: 0</p>	The NDF states that this area 'establishes an opportunity to deliver a compact, tight-knit fabric of low-rise typologies that blend living and working and address the need for family housing in proximity to the City Centre.' This area currently includes a mix of industrial areas, green space and small commercial uses. The industrial and commercial uses are generally low-rise, older stock and would be incompatible with a regenerated area in line with the NDF vision.		No significant redevelopment applications or permissions	<p>Commercial uses proposed within the NDF are for ground floor uses as part of a mixed-use scheme. This commercial is likely to be not limited to traditional E(g) or B-class employment, but more likely to be predominantly other E-class business opportunities. There would be some opportunities for very small scale E(g) or clean workshop units.</p> <p>Older existing uses east of Cambrian Street appear to be in most urgent need of renewal and regeneration,</p>	Mixed-use areas to be developed in longer term in accordance with NDF.	Council and other stakeholders should work with current businesses to identify alternative locations for industrial workshops, if possible.

Site Name/ Address	Baseline Employment Land (ha)	Description	Constraints	Planning Applications/ Permissions	Development Opportunities	Realistic Employment Land Supply, ha	Recommendations
					though this area still provides an existing economic function. Opportunities for alternative locations for small scale industrial workshops and operations should be provided in near proximity in East Manchester, if possible.		
Embankment	From NDF (approx. areas): Predominantly commercial: 0 Predominantly mixed-use: GF: 0.5 ha UFs: 0	The NDF identifies the Embankment as occupying 'the site of the former Holt Town Reservoir and defines a notable and singular transition between the Valley and the Terraces. There is an opportunity to craft a memorable and inviting arrival moment opposite the Holt Town Metrolink station, with the possibility to site a new cultural hub and establish an enhanced area of open space which could potentially be home to a community lido. Further east, a sequence of mid- to higher rise buildings could step up towards Confluence Park.' Similarly to the existing employment uses in the Terraces area, this area currently includes a mix of industrial areas, green space and small commercial/retail uses. The industrial and commercial uses are generally low-rise, older stock and would be incompatible with a regenerated area in line with the NDF vision.		No significant redevelopment applications or permissions	The NDF does not anticipate employment opportunities in this area.	0	Council and other stakeholders should work with current businesses to identify alternative locations for industrial workshops, if possible.
Valley	From NDF (approx. areas): Predominantly commercial: 0	The NDF identifies this area as forming 'a unique opportunity to enhance and reinvent the riparian landscape of the River Medlock and deliver a significant ecological and recreational link between the City Centre and SportCity and the Etihad Campus.'	Flood zone	No significant redevelopment applications or permissions	Not anticipated for employment opportunities in this area.	0	Not recommended for employment opportunities.

Site Name/ Address	Baseline Employment Land (ha)	Description	Constraints	Planning Applications/ Permissions	Development Opportunities	Realistic Employment Land Supply, ha	Recommendations
	Predominantly mixed-use: 0						

Development Potential

- 6.12 The following section provides a summary of the regeneration and development potential of Holt Town.
- 6.13 Overall, there is an opportunity to build on and expand the creative and artistic cluster in Holt Town and the NDF should look to support and enhance this cluster. The core of this cluster is either side of the Ashton Canal and this should be further enhanced to provide a higher intensity of creative uses in a range of workspaces. Businesses would benefit from improvements to digital infrastructure envisaged in the NDF, which would support creative and growth sectors.
- 6.14 Brunswick Mill and neighbouring sites provides opportunities for intervention in the near term, given its high-profile location, scale and potential for a catalytic development to spur further interest in Holt Town. The employment components of the scheme should be appropriate for start-ups, microbusinesses and growth businesses in the creative sector, including workshop, office, studio and shared spaces. Further intensification of uses along Pollard Street/Pollard Street East should enhance the employment and creative nature of this area.
- 6.15 A variety of residential uses are envisaged in the NDF and would be appropriate for a regenerated Holt Town to create a vibrant, eclectic environment. However, it is important that the delivery of the vision of the NDF does not preclude the creative sector that is currently a defining feature of the existing Holt Town economy. This sector has emerged here because of the interesting and inexpensive spaces available, and this should still be supported.
- 6.16 Existing basic industrial operations in this area, while unattractive, are forming a key part of the Holt Town economy and employment mix. Some of these operations are incompatible with the development intents outlined in the NDF. It is important that these businesses continue to have opportunities to operate in East Manchester to serve their local markets.
- 6.17 Existing operators in Holt Town are attracted to the area for its low rental price points in a location near to the City Centre. Redevelopment of units is likely to lead to an expectation of developers/landholders for a significant step change in rent levels. This may force out some occupiers. This can be minimised through encouraging innovative

and low-cost building styles for the employment uses, including shared spaces, refurbishments and modular builds.

- 6.18 While probably not an area of interest for institutional investors, there is an opportunity for private and smaller developers to acquire in-fill locations at Holt Town to drive forward the regeneration of the area and provide characterful products.
- 6.19 The proposed expansion of the City Centre has the potential to benefit fringe areas, such as Holt Town, making them more attractive as a work and living destination.
- 6.20 The ultimate employment floorspace yield of this area is subject to significant uncertainty, despite the planning guidance of the NDF. Prior to the development of the NDF, Council's Employment Land Supply database estimated an employment floorspace supply of some 32,120 sqm for Holt Town.
- 6.21 The below table provides a summary of the potentially floorspace capacity for commercial and mixed-uses within Holt Town, though this should be seen as indicative only and the roll out of the NDF would respond to market needs, including scale of development. While some of the mixed-use floorspace could be taken up by uses classified as traditional office (Eg(i)) occupiers, it is assumed for this report that the mixed-use spaces are for retail, food and beverage, services and leisure uses and that the office space is entirely within the commercial space.

**Table 17 – Summary of Development Areas: Holt Town Neighbourhood
Development Framework Area**

Location	Gross Area for Commercial (ha)	Gross Area for Mixed-use (ha)	NDF Provisions	Height	Estimate of Commercial Floorspace Capacity (sqm)	Estimate of Mixed-use Floorspace Capacity (sqm)
Plateau	0.4 (all multi-storey)	0.8	Commercial 3-5 storeys; GF only for mixed-uses		8,000	4,000
Ridge	3.2 (including 0.7 ha multi-storey)	2.7	Commercial from up to 5 to up to 22 storeys; GF only for mixed-uses		47,500	13,500
Terraces	0.0	2.0	GF only for mixed-uses		0	10,000
Embankment	0.0	0.5	GF only for mixed-uses		0	2,500
Valley	0.0	0.0			0	0
Total Area	3.6	5.0			55,500	30,000
Floorspace Estimate from Employment Land Supply					32,120 sqm	

Sources: BE Group analysis of sites; Employment Land Supply database, 2023

7.0 EASTLANDS STRATEGIC EMPLOYMENT LOCATION

Relevant Policy Documents

- 7.1 The following table provides the summaries of the relevant policies and relevant documents specific to Eastlands (Sportcity). As seen in the policy documents, the broad focus of the Eastlands Strategic Employment Location is for major sports and leisure and thus of less relevance to this study looking at employment (E(g), B2, B8) uses.

Table 18 – Policies and Documents – Sportcity and Surrounding Area

Document	Comments
Places for Everyone Joint Development Plan	<p>Places for Everyone identifies the Etihad Campus as part of the broader Core Growth Area within Greater Manchester, centred on the City Centre but also extending to Central Park and Sportcity and Etihad campus in the east and Trafford Park and Port Salford in the west. The document identifies this area as of a huge scale and diversity of economic and residential opportunities, which is accessible from Greater Manchester and wider.</p> <p>Policy JP-Strat1 states that the economic role of the Core Growth Area will be protected and enhanced, supporting major growth in the number of jobs. 'Complementary to, but not at the expense of, its economic function it will see a significant increase in the number and range of homes in areas with good connections to employment, training and education facilities.'</p>
Manchester Core Strategy 2012 to 2027	<p>Policy EC7 covers the Eastlands Strategic Employment Location, including the City of Manchester Stadium (Etihad Stadium), Eastlands District Centre, Velodrome and the Openshaw West site. 'This location is suitable for a major sports and leisure visitor destination with complementary commercial, retail and hotels.' Significant development has occurred in this area since the publication of the Core Strategy, including the development of the Openshaw West site for further football facilities, the Co-op Live music venue and supporting leisure and sporting facilities.</p> <p>The Core Strategy identifies the Collar Site, to the east of the stadium, with additional land to the north and west. The Core Strategy identifies this as an area for leisure, recreation and entertainment venue of national significance (which has now largely been realised with the opening of the Co-op Live venue). Developments that are predominantly tourism/leisure focused will be supported. The Strategy states that on development sites to the north and west, 'development of complementary commercial uses will be supported, particularly to accommodate economic activities associated with the growth of Manchester City Football Club.'</p>
Eastland Regeneration Framework, 2019 Update	<p>The document outlined the vision for the Sportcity and Etihad Campus, stating the ambition to drive forward the development of a globally competitive sport, leisure and recreation offer.</p> <p>Also, part of the vision was becoming the 'home of global and national sports organisations which can thrive and develop global best practice. In doing so the Etihad Campus can become the home to new sports related businesses in a new "Sports-Tech" cluster for the city-region.'</p>

Document	Comments
	<p>Within the 'New Opportunities' section of the Framework, plans are outlined for Sportcity. The zone encompasses the existing Regional Athletics Centre, the indoor training centre, the National Squash Centre and the Regional Tennis Centre as well as the Edwin Road Industrial Estate. The document states that this area of the campus could accommodate higher education and support facilities, though this has yet to be finalised.</p> <p>A need was identified to accommodate the office space demands of sporting National Governing Bodies (NGBs) who wish to relocate to Sportcity. Land adjacent to the National Squash Centre was identified as a potential location, though are now located in the House of Sport within the national Squash Centre. The NGBs would join the existing National Cycling Centre, National Taekwondo Centre, National Speedway Stadium, Regional Basketball, Squash and Tennis Centres and the Rugby Football League. Further NGBs are interested in locating to this area.</p> <p>Another opportunity area identified in this report is 'The Etihad Campus (now Sportcity) Commercial Zone' which encompasses the perimeter of the Etihad Stadium to the north and east, including the large car parks and gasholder and the north as well as the Tesla car showroom and Manchester City's Stadium Shop in the west. Here, commercial and employment space will be allowed to come forward.</p> <p>Alongside the Sport Tech ambitions, there is a long-term ambition to continue to deliver a destination for leisure and recreation. One such opportunity includes the 20,000 plus spectator indoor arena. 'This and other facilities including a multi-plex cinema, an expanded food and beverage offer, and hotel development are seen by investors and operators being potentially viable propositions given the changing and growing market for entertainment activities.' Much of this has now come to fruition with the opening of Co-op Live, hotel under construction and experiential/leisure facilities, though the cinema is no longer being pursued.</p>
UDP Extant Policies – Area 4 East Manchester	EM11 identifies Sportcity as integral to the regeneration of East Manchester, creating a focus for activity and regeneration. EM11 highlights permitted uses including international sports facilities, District Centre, commercial development residential and mixed-use development and pedestrian, cycle and Metrolink connections. Much of this has since come forward, including further sports facilities, the District Centre, commercial and leisure uses and transport connections.

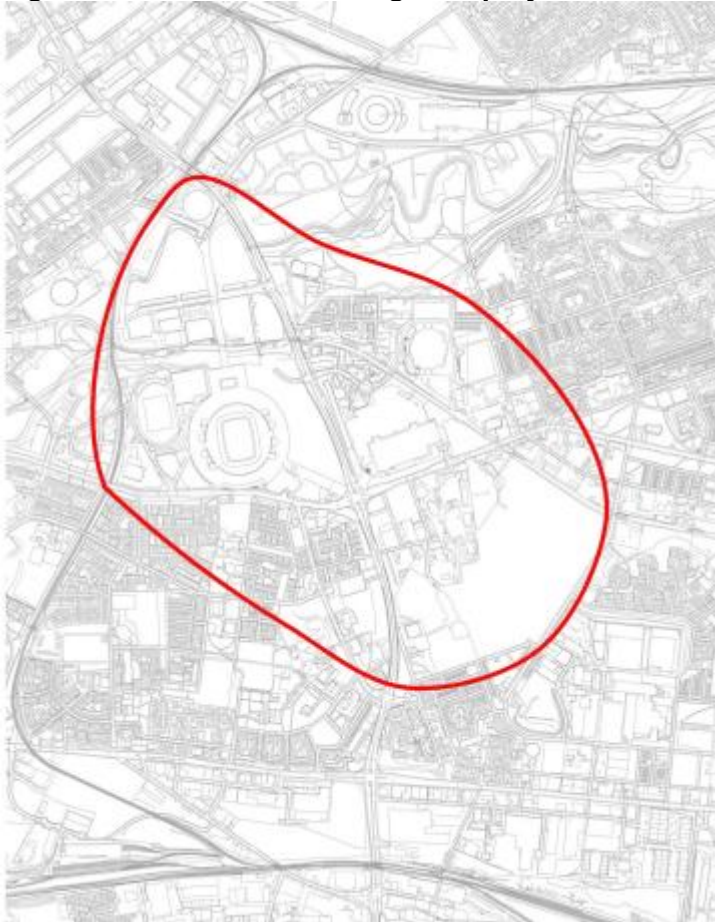
Source: BE Group commentary on above documents, 2024

- 7.2 The focus of this Strategic Economic Location will continue to be sporting and broader leisure and entertainment uses. Any E(g), B2 or B8 employment uses will be ancillary to these core uses, supporting the sporting and leisure infrastructure. Of key relevance to this study will be the regeneration of the Edwin Road Industrial Estate for the Sport and Innovation Zone and the potential employment elements of that site.

Spatial Overview

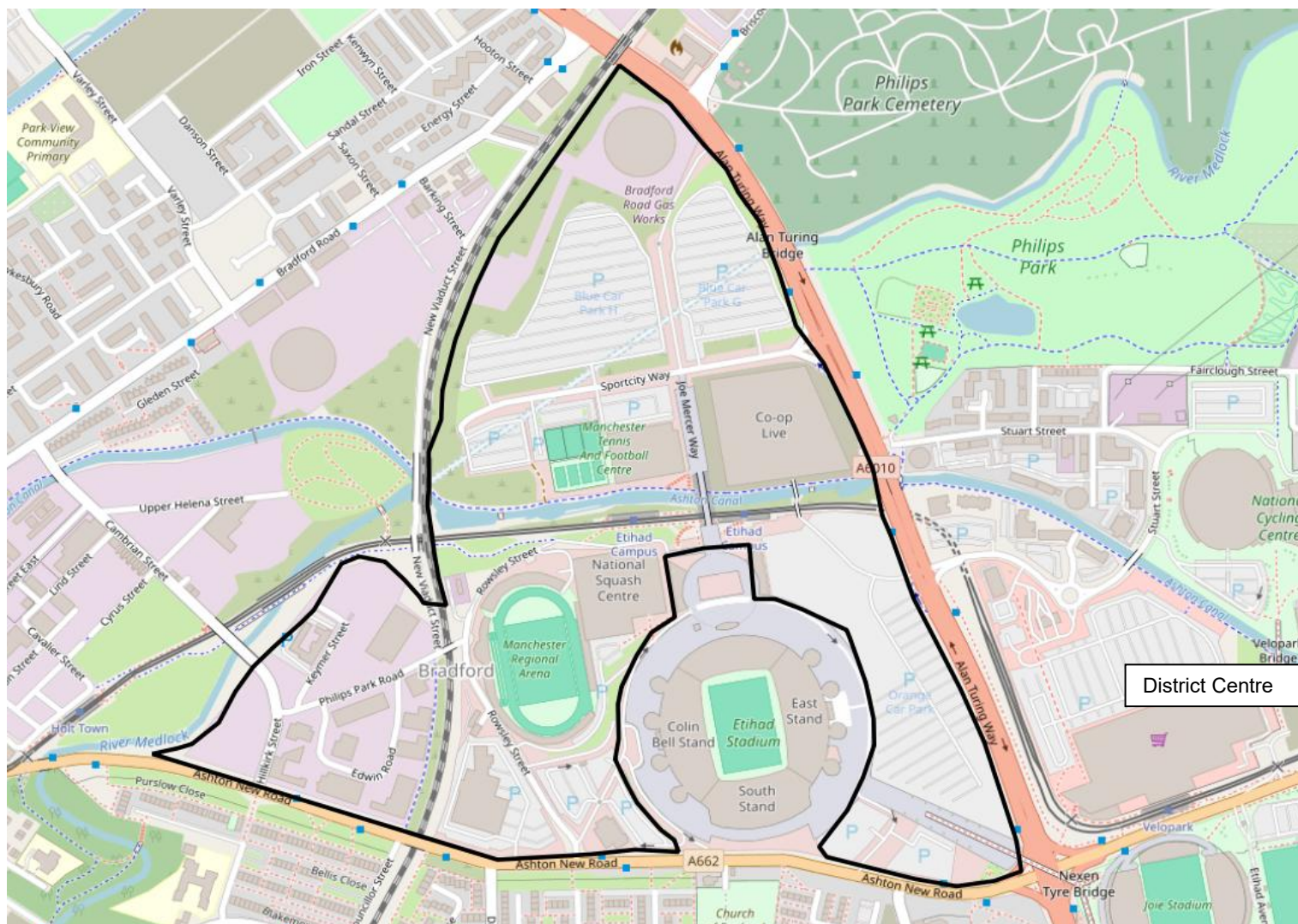
- 7.3 The Eastlands Strategic Employment Location boundary as identified in the Core Strategy is illustrated below, followed by an illustration of the surrounding areas that potentially could comprise some commercial and employment uses.

Figure 13 – Eastlands Strategic Employment Location identified in Core Strategy



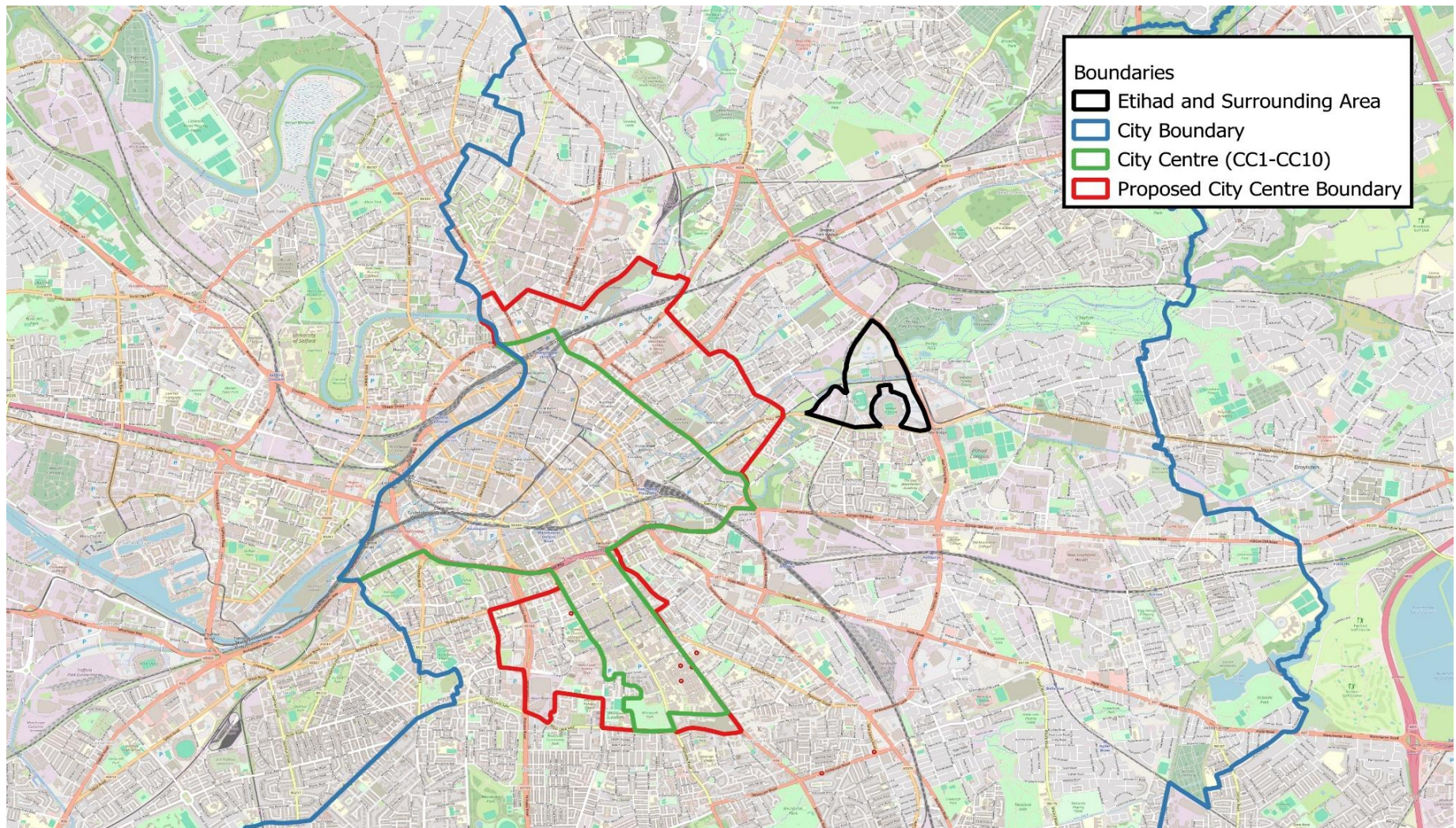
Source: Core Strategy (Figure 8.5)

Figure 14 – Sportcity and Surrounding Area



Source: BE Group, 2024

Figure 15 – Sportcity in Manchester Context




Source: BE Group and MCC, 2024



- 7.4 Sportcity is a large, nationally significant sports and leisure complex, with excellent access to transport options, including Metrolink, bus and significant car-parking. The focus of this node is Etihad Stadium (home of Manchester City Football Club), but the sports facilities are substantially broader than this, encompassing land on either side of Alan Turing Way (A6010) and including multiple sports, including football, cycling, tennis, squash, taekwondo and basketball. The City Football Academy is also located within this hub.
- 7.5 The opening of the Co-op Live venue provides a substantial opportunity to expand the range of leisure events at the campus and establish the area as not only a nationally significant sporting hub but also a globally significant music and entertainment area. With a seating capacity of 23,500, the Co-op Live is Europe's largest indoor arena.
- 7.6 Areas of consideration for employment uses for this study are on the western side of the A6010 surrounding Etihad Stadium, including the existing Edwin Road Industrial Estate and the former gas holder sites in the north, which are examined below.
- 7.7 Other employment nodes, such as Central Park and Holt Town (both assessed elsewhere in this document) are nearby and represent a broader corridor of economic functions within the Eastlands Strategic Employment Location. Importantly, these have significantly different functions to Sportcity and have the potential to accommodate further office and industrial employment uses that would be less appropriate for Sportcity.

Employment Land

- 7.8 The following provides an analysis of the relevant subareas within the Eastlands Strategic Employment Location.

Table 19 – Employment Areas within Eastlands Strategic Employment Location

Site Name/ Address	Baseline Employment Land, ha	Description	Constraints	Planning Applications/ Permissions	Development Opportunities	Realistic Employment Land Supply, ha	Recommendations
Land And Buildings on the North East Side of Ashton New Road Beswick (Edwin Road Industrial Estate)	5.19	 <p>This site is the Edwin Road Industrial Estate in the south-west of Eastlands which is made up of several light industrial units with occupiers including MCC (Library and Specialist Markets functions), Classic Football Shirts and a number of motor trade operators. The industrial estate has small, basic to moderate quality units, providing floorspace for SMEs in a high profile location. To the north of Edwin Road is the premises of the Manchester Equipment and Adaptation Partnership with more matchday parking for Manchester City FC to the rear. Finally, an office premises of Commsec, suppliers of security services, is located in the west of the site.</p>	Car parking currently in use on matchdays	No planning applications/permissions	<p>Some of this site in the north has a low intensity of development and could accommodate further uses.</p> <p>The Edwin Road Industrial Estate is under performing as an industrial asset and has been identified within the Eastlands Regeneration Framework (2019) as a Sport & Innovation Zone. The Council own the majority of the freehold and will masterplan the area for future development that would support the wider Sport and Leisure uses of Sportcity.</p> <p>If the Sport and Innovation Zone proposal is not brought forward, on-going commercial employment uses of this site would be appropriate, although an improvement and refurbishment programme of older units should be undertaken within the estate.</p>	0	Support the development of the Sport and Innovation Zone on this site.

Site Name/ Address	Baseline Employment Land, ha	Description	Constraints	Planning Applications/ Permissions	Development Opportunities	Realistic Employment Land Supply, ha	Recommendations
		Overall, this area appears incongruous alongside Sportcity and would not represent the highest use of this site.					
Land on the South West Side of Alan Turing Way	16.19	 <p>Manchester City Council own majority while National Grid Twenty Seven Limited own 4 ha. Northern section of the Sportcity contains a disused National Grid gasholder, large car parks used by Manchester City FC on match day, the Manchester Football and Tennis Centre and the recently opened multi-purpose events venue Co-op Live.</p>	<p>Possible ground contamination from previous uses</p> <p>Car parking currently in use on matchdays</p> <p>Walkways for pedestrian access to both the stadium and the proposed events venue run through the site</p>	The National Grid received prior approval (134295/DEM/2022) for the demolition of the gasholder and associated buildings and infrastructure in the most northerly section of the site. Demolition and remediation is on-going.	<p>The below sites are currently being marketed on behalf of National Grid. Remediation work has been undertaken on these sites, including removal of gas infrastructure (on-going). The two larger sites are likely to be mixed-use schemes, with the smaller site likely to be oriented towards leisure, tourism or sporting facilities. Commercial uses are likely to be retail or food and beverage uses, though there may be opportunities for offices or small-scale workshops as ancillary uses.</p> 	6.42 ha currently being marketed, including 2.51 ha in the Eastlands Strategic Employment Location and 3.91 ha on the adjacent site.	Work with landholder of National Grid sites (upon sale) to encourage a broad mix of uses on site and a high-quality development scheme. Low priority for E(g), B2, B8 uses.

Development Potential

- 7.9 There are relatively limited development opportunities for E(g), B2 or B8 uses within the Eastlands Strategic Employment Location.
- 7.10 The Edwin Road Industrial Estate has been earmarked in the Eastlands Regeneration Framework as part of the Sport and Innovation Zone. The Council own the majority of the land within this area and will masterplan the site to support the Sport and Innovation Zone. Of relevance to this study is ensuring that the existing industrial businesses within the estate have sufficient options nearby in which to relocate. If businesses are looking to upgrade the quality of their premises, there are significantly more limited modern options, with Lowry Park a rare example of a new build option for businesses nearby. This increases the importance of encouraging the rejuvenation of these other nodes (discussed in those chapters) in providing a broader array of modern employment units for businesses.
- 7.11 If the Sport and Innovation Zone proposal does not proceed, there would still be a need to renew this estate, given the modest quality of premises. A refurbishment programme is recommended to reinvigorate the estate, though a more comprehensive redevelopment for alternative industrial units is not recommended, given that there is likely to be on-going interest to absorb the site into the broader campus.
- 7.12 The National Grid sites currently being marketed are likely to be mixed-use developments. There may be an opportunity for office space as part of this broader mix of uses, with an opportunity to attract businesses looking to be near to the sporting campus (either for business or prestige reasons). However, this is likely to be an ancillary part of any scheme.
- 7.13 Council's Employment Land Supply database identified the potential for some 45,000 sqm of office space within this area. However, the Sport and Innovation Zone, if proceeding, will not provide additional office floorspace available to the wider market. Other opportunities for employment-led floorspace are very limited and thus for the purposes of this report, it is assumed that the Strategic Employment Location would not provide additional office floorspace.

8.0 CENTRAL PARK STRATEGIC EMPLOYMENT LOCATION

Relevant Policy Documents

- 8.1 The following table provides the summaries of the relevant policies and relevant documents specific to Central Park.

Table 20 – Policies and Documents – Central Park

Document	Comments
Places for Everyone Joint Development Plan	<p>Places for Everyone identifies Central Park as part of the broader Core Growth Area within Greater Manchester, centred on the City Centre but also extending to Central Park and Etihad campus in the east and Trafford Park and Port Salford in the west. The document identifies this area as of a huge scale and diversity of economic and residential opportunities, which is accessible from Greater Manchester and wider.</p> <p>Policy JP-Strat1 states that the economic role of the Core Growth Area will be protected and enhanced, supporting major growth in the number of jobs. 'Complementary to, but not at the expense of, its economic function it will see a significant increase in the number and range of homes in areas with good connections to employment, training and education facilities.'</p>
Manchester Core Strategy 2012 to 2027	<p>Policy EC6 of the Core Strategy identifies Central Park as a Strategic Employment Location suitable for 60 ha of employment uses. The policy states that a range of employment uses will be encouraged across the whole of the site, including B1(b and c) (now E(g)ii and iii), B2, B8, sui generis and ancillary commercial services. B1(a) (now E(g)i) is to be supported north of Oldham Road.</p> <p>The policy identifies creative and media and manufacturing as key sectors for this area. The commentary states that it offers the potential for accommodation that suits existing sectors and knowledge-based industries. The commentary also states that given the transport advantages of the site, it is the most suitable for out of city centre offices.</p> <p>It is noted that since the publication of the Core Strategy, there has been one office completion at Central Park, north of Oldham Road (One Central Park), with significant market changes since 2012 meaning that out of city centre office developments have been more limited than anticipated.</p>
UDP Extant Policies – Area 4 East Manchester	<p>EM5 covers the Central Park subarea of East Manchester. It states that development will be permitted for a high-quality business park comprising B1, B2 and B8 uses. It notes that B8 uses will only be permitted if it is demonstrated that no harm will come to the location of knowledge-based industries, B1 and B2 uses.</p> <p>EM5 states that Central Park offers a number of opportunities for developers including:</p> <ul style="list-style-type: none"> • 'a range of sites to suit businesses within the service and specialist manufacturing sectors, from incubators and start up units to larger businesses requiring flexible business space;

	<ul style="list-style-type: none"> • a highly accessible location with good public transport links including the planned Oldham/Rochdale Metrolink extension, allowing greater penetration of the Business Park by a range of modes of transport; • close proximity to the City's Universities, the City Centre and other initiatives taking place in East Manchester; and • prestigious high profile gateway locations including development parcels at the Oldham Road/Hulme Hall Lane junction.'
Central Business Park Way Forward, 2017 – Committee Report	<p>This document describes Central Business Park as a 'key employment location and sub-regional economic asset comprising a number of undeveloped parcels of land set within a high quality environment.'</p> <p>The Council acquired 39 acres of undeveloped land there at the end of March 2016. The Council also acquired Central Park (North) within the Park to undertake a programme of redevelopment to ensure it is attractive to the target market of digital and creative sectors. 'This will offer grow on space for occupiers of the Sharp Project as well as space for larger more mature companies operating in this sector.'</p> <p>Central Park offers fully serviced plots as well as 'high quality infrastructure, an excellent environment and high quality neighbouring office development'</p> <p>The document contains a plan which states that the Park has 16.735 of developable land.</p>

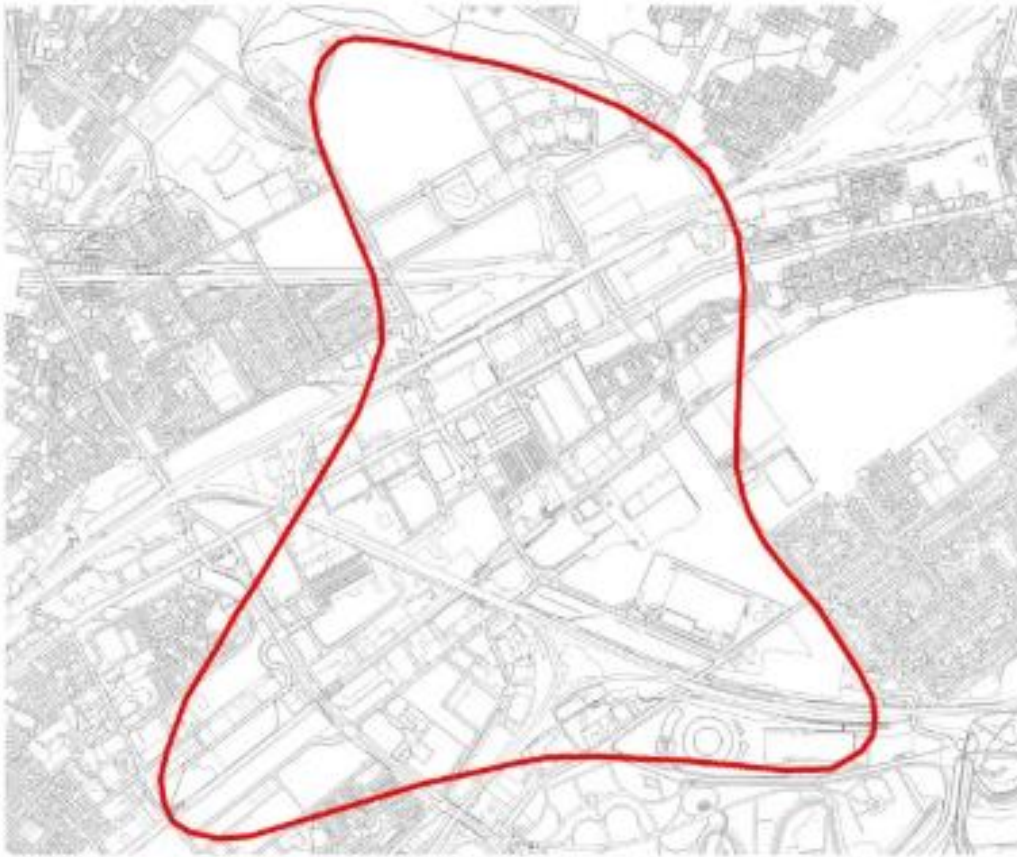
Source: BE Group commentary on above documents, 2024

- 8.2 Therefore, Central Park has significant recognition at the regional and city levels for its economic function, connectivity to the City Centre and ability to play a role as part of a substantial wider economic corridor that is well connected.

Spatial Overview

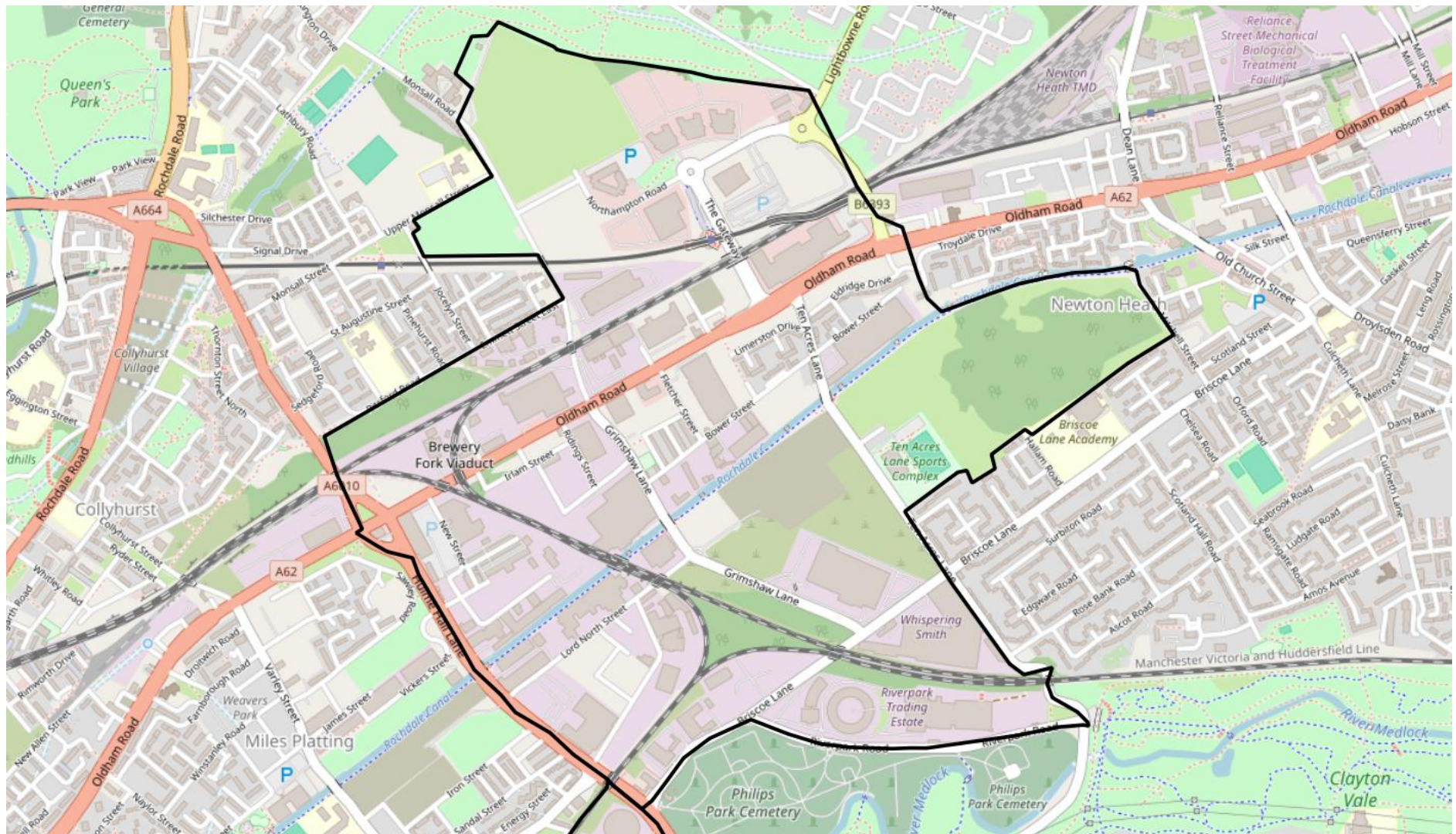
- 8.3 The Central Park area as identified in the Core Strategy is illustrated below (Figure 16), which is not based on plot area boundaries. Overleaf, the boundary illustrated (Figure 17) has been prepared based on the boundary identified in the UDP and provided by Council. However, this UDP boundary may require updating to reflect current market realities and plans.

Figure 16 – Central Park Strategic Employment Location identified in Core Strategy



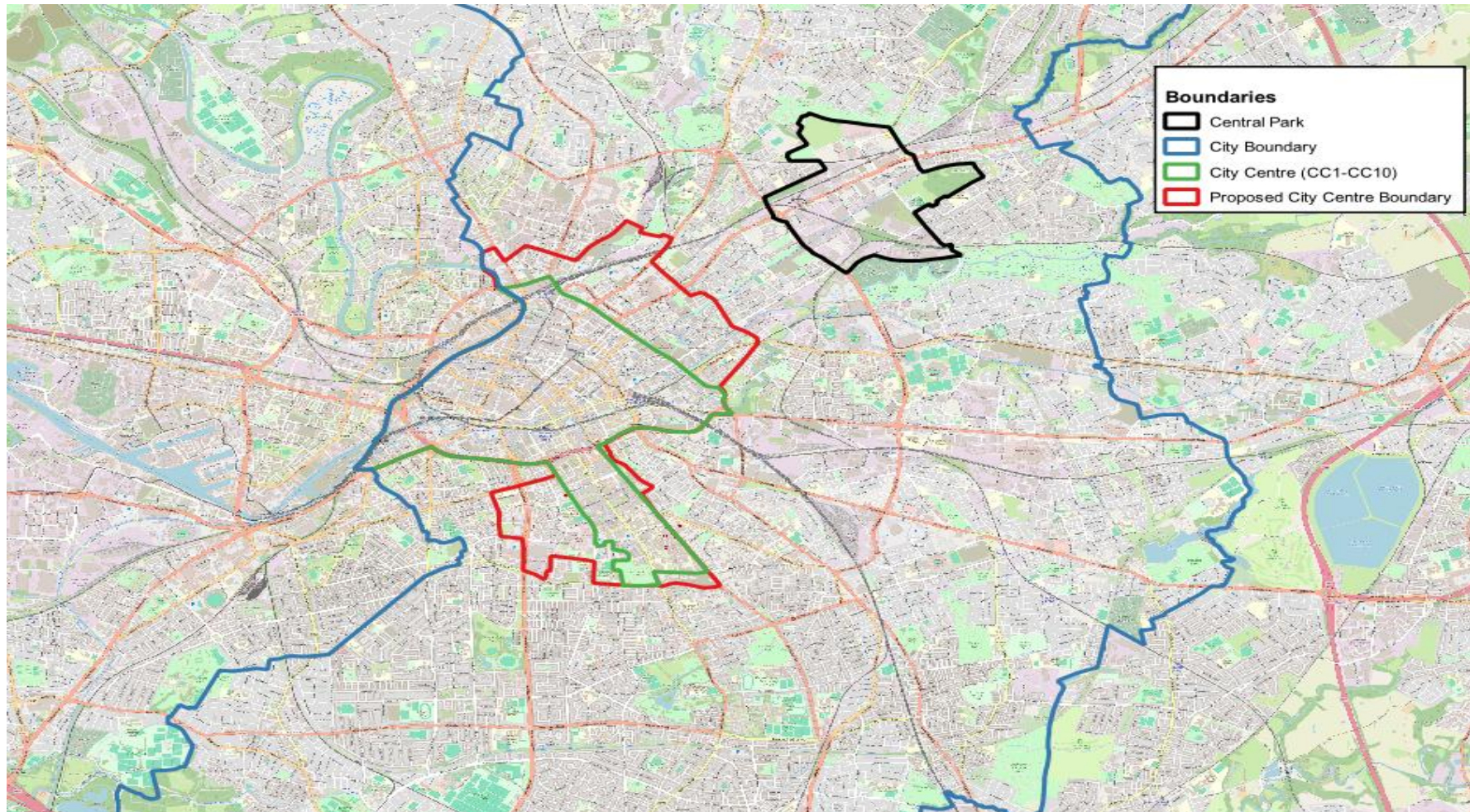
Source: Core Strategy (Figure 8.4)

Figure 17 – Central Park – UDP Boundary



Source: UDP Proposals Map, MCC, 2024

Figure 18 – Central Park in Manchester Context



Source: BE Group and MCC, 2024


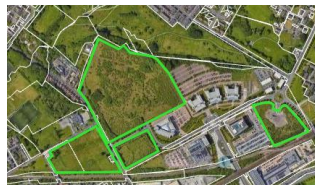
- 8.4 The Central Park Strategic Economic Location is a diverse area on either side of Oldham Road (A62), which is a key arterial connecting the City Centre to the north-east of Greater Manchester. The Strategic Economic Location is also well-served by the Metrolink network (in the north of the site) and buses.
- 8.5 Central Park (North) is a business park to the north of Oldham Road and is a significant office campus, comprising high-quality office buildings and larger occupiers, including Greater Manchester Police and Fujitsu. Buildings comprise of large floorplates and are a mix of single-occupier and multi-let buildings. There remain some serviced but undeveloped plots within this area, as well as existing office buildings that are underoccupied. The business park has an attractive boulevard, landscaping and art installations to position itself as a high-quality office location.
- 8.6 At the gateway location to the business park but separated from the remainder of Central Park (North) by the Metrolink corridor, is the Sharp Project, which is a mixed space for digital media, television and film production. Spaces include offices, studios and stages for flexible hiring and leasing arrangements across about 20,000 sqm of floorspace. Arbeta is a digital and tech-focused serviced office building in the north-west of the business park which offers communal workspaces, desks, office suites and large workspaces on a flexible basis. Together with larger occupiers such as Fujitsu, these assets provide a hub for digital and creative uses, though this is somewhat muted by the prominence of the Greater Manchester Police buildings in the centre of business park.
- 8.7 Despite the quality and key assets of the business park, there has been very limited development activity in recent years, as the market has moved away from large and corporate occupiers moving to out-of-city locations. While development activity in the City Centre has continued, this location as Manchester's premium out-of-centre location has stalled. Viability constraints for new build office developments outside of the City Centre are considerable and are limiting market interest. It is noted that Fujitsu has vacant space in its holdings which it is looking to dispose.
- 8.8 The uses along Oldham Road are a disparate mix of trade services, light industrial, offices, highway services and older residential dwellings. The high traffic flow along Oldham Road means that business have very good visibility to passing trade, but it does reduce the amenity of the area. This corridor is not functioning as a single entity and does not link well with the remainder of the Strategic Employment Location.


- 8.9 South of Oldham Road is a mix of new and old industrial areas, residential uses and green space. The Manchester Victoria and Huddersfield rail line bisects this area, though there are not rail stations within or nearby to this node that would service it. This does impact on perceptions of movement and layout of existing uses within this area. Lowry Park is a major regeneration project within this node and the first phase is nearing completion. This is an industrial and logistics scheme that will provide about 40,600 sqm of space upon full development. Marketed by Canmoor as providing prime last mile industrial space, this scheme will be available on a leasehold basis at £15-17/sqft for smaller units and £11.50-13/sqft for larger units.
- 8.10 The Lowry Park site was a former foundry works, which was closed in 2017 and demolished. This scheme shows the potential for viable regeneration works of older, units into modern employment schemes, retaining the core employment functions of the site, but in units that meet the needs of modern occupiers.
- 8.11 Other industrial uses south of Oldham Road are older units, providing basic to moderate accommodation and outdoor storage options. There appear to be further opportunities for regeneration of this area for modern employment uses over coming years, though this would require significant site amalgamation to enable it to occur at scale.
- 8.12 There are some pockets of residential throughout the Strategic Employment Location, including alongside and surrounded by industrial uses. These represent areas with strong potential for conflicts between neighbouring uses, with residents having potential for nuisances (e.g. noise, air quality, traffic) and businesses being limited in their operations. This potential conflict would need to be monitored and managed.
- 8.13 Surrounding the Strategic Employment Location is a range of residential areas, including some pockets of deprivation and unemployment. The broad range of uses in the Strategic Employment Location (manufacturing, logistics, office-based, creative) are important in providing nearby employment opportunities for the local community and this should be protected and enhanced.



Employment Land


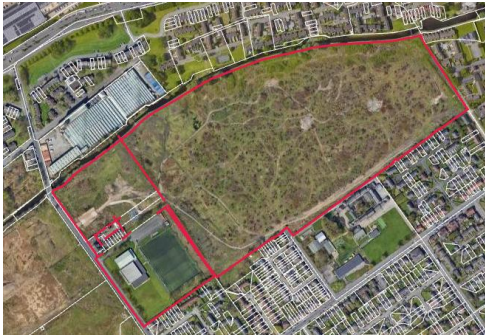
- 8.14 The following provides an analysis of subareas within Central Park, including identifying areas for potential redevelopment and significant planning applications and permissions.


Table 21 – Employment Areas within Central Park Strategic Employment Location



Site Name/ Address	Baseline Employment Land, ha	Description	Constraints	Planning Applications/ Permissions	Development Opportunities	Realistic Employment Land Supply, ha	Recommendations
Land and Buildings on the North West Side of Northampton Road (Central Park Business Park North)	38.5	<p>This area comprises Central Park (North) business park, including offices along Northampton Road, the Sharp Project on Oldham Road and vacant land. Land is in ownership of MCC. Some significant development plots remain, including serviced plots appropriate for office buildings and a larger site to the north-west. Development has been limited in recent years, with lack of interest in developing new build offices in this location. Arbeta (tech hub) and Sharp Project (film/TV studio spaces) show creative focus within this location.</p> 	Nil	No recent significant permissions or applications for developments.	<p>Development opportunities are unlikely to be for traditional office space, but rather for creative spaces that provide a mix of offices, studios and digital laboratories, further enhancing the digital creative node.</p> <p>There is a proposal for a Transport for Greater Manchester (TfGM) depot to locate in the large north-west plot, which would have very good connectivity to the Metrolink and rail networks. Such a scheme should not impede the amenity of the remainder of the business park and its market position as a high-quality employment location.</p> <p>Monsall Road is the logical western boundary of the business park and thus the western most site appears to be too separated from the remainder of the park and could be released for alternative uses.</p> 	16.59 (inc. TfGM site of 9.92 ha)	<p>Encourage workspaces that are appropriate for the digital and creative economy.</p> <p>Retain site for employment, though consider parcel west of Monsall Road (3.25 ha) to be released for alternative uses.</p> <p>TfGM scheme to be developed so as not to impact negatively on remainder of business park.</p>

Site Name/ Address	Baseline Employment Land, ha	Description	Constraints	Planning Applications/ Permissions	Development Opportunities	Realistic Employment Land Supply, ha	Recommendations
Range of sites north of Oldham Road from The Gateway to Queens Road	13.5	<p>Area in multiple private sector ownerships. Employment uses comprise moderate quality units, with uses being trade services, industrial and light industrial. Some uses along this area, including a small number of residential dwellings, child nursery, petrol station.</p> <p>Two land parcels to the north of the rail corridor are a tree covered site and Wilson Park Business Centre, which provides flexible office and workshop space in dated buildings. The tree covered site is narrow and not in a prominent location and appears to be inappropriate for employment uses.</p> 	<p>Access from Oldham Rd</p> <p>Rail corridor dividing site</p> <p>Tree coverage of vacant site</p>	Application 128133/FO/2020 on 0.85 ha site for the erection of a single storey building to form light industrial and distribution unit, was approved on the 15 th February 2021. Currently under construction.	<p>Some intensification or rejuvenation of uses could occur along Oldham Road, though this should remain focused on trade services and industrial uses.</p> <p>The tree covered site in a less prominent location to the north appears to be inappropriate for employment uses.</p>	0	Retain area for employment uses. Encourage rejuvenation of older stock.
Sites bounded by rail corridor, Rochdale Canal, A6010, Oldham Road	8.23	Predominantly an industrial estate, though with some terraced residential within this area. The industrial units are of a basic to moderate quality and comprise a mix of small general industry and storage operators. Internal streets are narrow and difficult to navigate, with some on-street parking causing congestion. Fully developed area.	<p>Congestion</p> <p>Narrow internal streets</p> <p>Potential conflicts with residential uses</p>	No recent significant permissions or applications for developments.	Area could see some broad regeneration or, including consolidation of sites and redevelopment for employment uses. Site remains appropriate for employment and any redevelopment should be focused on rejuvenating the area for employment uses.	0	Retain for employment uses. Look to encourage regeneration of this site in longer term for modern employment uses.

Site Name/ Address	Baseline Employment Land, ha	Description	Constraints	Planning Applications/ Permissions	Development Opportunities	Realistic Employment Land Supply, ha	Recommendations
							
Sites bounded by Oldham Road, Thompson Street, Rochdale Canal, rail corridor	15.4	<p>Area south of Oldham Road, with a broad mix of uses, including good quality office buildings, moderate quality industrial/warehousing, outdoor storage, showrooms, hotel, green space, services and residential uses. This area has some larger warehousing units. Navigation through this area can be confusing.</p> 	Potential conflicts with residential uses	Application on small site (0.02 ha), 127962/FO/2020, for the erection of a two-storey building comprising showroom, with ancillary offices and storage was approved in November 2023. Currently under construction.	Some potential for refurbishment or regeneration of older units, though unlikely to be in a consolidated manner as those units that appear to have more immediate need of renewal are dispersed throughout the area.	0	Retain for employment uses. Look to encourage regeneration of older premises for modern employment uses.
Residential and industrial areas along	10.2	A mix of uses, predominantly residential terraces, though with a large, long-term, single-occupier industrial use south of Bower Street (T&A Bedding	Potential conflicts with residential uses	No recent significant permissions or	Manufacturing use in the mill is appropriate to continue, though not envisaged that employment uses would expand in this	0	Retain employment within Mill site, but no further expansion of

Site Name/ Address	Baseline Employment Land, ha	Description	Constraints	Planning Applications/ Permissions	Development Opportunities	Realistic Employment Land Supply, ha	Recommendations
Bower Street between Oldham Road and Rochdale Canal, east of Thompson Street.		in Ten Acre Mill). Good green space surrounding the residnetial uses. 		applications for developments.	location. If mill site becomes vacant, consideration should be given to non-employment uses at this site.		employment in this node.
Former Jacksons Brickworks site and Ten Acres Lane Sports Complex	22.0	Jacksons Brickworks site is large, cleared site with approval for a major residential scheme (378 dwellings) with supporting commercial uses (E, F1, F2). Other uses in this area are an existing leisure centre and a small pocket of residential. No employment uses. 	Nil	Application 133700/FO/2022 on Jacksons Brickworks site for residential-led scheme (378 dwellings, 671 sqm commercial). Approved.	Site not for employment uses	0	Not recommended for employment uses
Sites bounded by	24.4	Collection of sites centrally located within the Strategic Employment Location. Lowry Park	Nil	Planning application,	Canmoor's Lowry Park scheme to develop as approved, with	Lowry Park site (10.31 ha	Retain for employment uses.

Site Name/ Address	Baseline Employment Land, ha	Description	Constraints	Planning Applications/ Permissions	Development Opportunities	Realistic Employment Land Supply, ha	Recommendations
Huddersfield Line rail corridor, Ten Acres Lane and Rochdale Canal		<p>(green plot illustrated) is under construction with Phase 1 nearing completion and being marketed. Will provide good quality industrial units 500-4,700 sqm. Neighbouring uses include a large bread producer (Fine Lady Bakeries), a vacant site, industrial units and outdoor storage. Unlikely to be intensification of existing uses.</p> 		129444/FO/2021, was approved on the 24 th September 2021. The application was for the erection of 42,782 sqm of floorspace across 12 industrial units with E(g), B2 and B8 uses. Phase 1 of this development is currently under construction by developer Canmoor and is due to deliver 17,085 sqm of floorspace across 10 units.	Phase 1 nearing completion. Potential for vacant site alongside Lowry Park (2.01 ha) to be developed for similar industrial uses.	<p>under construction)</p> <p>Vacant adjacent site (2.01 ha)</p>	Further development to focus on industrial/ warehousing uses.
Sites bounded by Huddersfield rail corridor and spur, A6010 and Rochdale Canal	12.7	Messy industrial node, with basic to moderate units. Some unkempt lots, on-street parking and dated units give impression of low amenity. Provides budget industrial accommodation options. Outdoor storage and HGV parking are also within this node.	<p>On-street parking</p> <p>Poor amenity units and lots</p>	No recent significant permissions or applications for developments.	<p>Potential for some intensification of uses within the centre of site or more comprehensive redevelopment of this area. Any rejuvenation of the area should retain employment focus, but with improved amenity and layout of this area.</p> <p>Nearby Lowry Park scheme could provide catalyst for developer interest.</p>	0 (though some areas in centre of site could be more intensively developed)	<p>Retain for employment uses but encourage refurbishment and redevelopment of units.</p> <p>Work with landholders to examine options for more comprehensive redevelopment of this node.</p>

Site Name/ Address	Baseline Employment Land, ha	Description	Constraints	Planning Applications/ Permissions	Development Opportunities	Realistic Employment Land Supply, ha	Recommendations
							
Sites bounded by Briscoe Lane, Riverpark Road, rail corridor and A6010.	12.9	<p>Collection of industrial, light industrial and trade services units in south of Strategic Employment Area in MCC and private ownerships. Somewhat removed from other employment assets, this area has a quieter feel than other areas. Moderate to good quality units along Briscoe Lane, but with some vacancies. A new build has recently been completed along Briscoe Lane on land owned by MCC, comprising 3,251 sqm of industrial units.</p> <p>Riverpark Trading Estate, along Riverpark Road, has basic accommodation and a significant level of vacancies. It is a SHLAA site.</p> 	Nil	<p>Application, 123295/FO/2019, for the erection of a 3,251 sqm light industrial and storage/distribution building was approved on the 20th May 2020. The building was recently completed.</p>	<p>Briscoe Lane units are in reasonable condition and expected to have an on-going industrial/trade services function.</p> <p>The Riverpark Trading Estate has recently been acquired by a residential developer. This estate is in need of redevelopment. Loss of this site for residential uses is unlikely to significantly impact on the overall function of the Strategic Employment Location</p>	0	Riverpark Trading Estate is in need of redevelopment. It is recommended that this site could be released for residential uses.

Sources: BE Group analysis of sites; LandInsight; MCC, 2024

Development Potential

- 8.15 Central Park is a large and disparate employment node, comprising economic assets that are important for the City and Greater Manchester. The area has seen some regeneration, including the current Lowry Park industrial scheme and there appears to be further opportunities for regeneration of older industrial stock. However, significant office development has been very limited, despite readily developable sites at Central Park (North). Therefore, the consideration of further enhancement of Central Park should focus on how further regeneration of older stock can continue south of Oldham Road and how the unutilised land at Central Park (North) can be developed.
- 8.16 The Lowry Park scheme is an example of how older industrial areas in Central Park can be regenerated and retain a core industrial employment function. It was formerly a foundry site and thus from a regeneration perspective it was a single, large site, which was acquired and redeveloped. It is larger than other sites potentially suitable for regeneration in Central Park, thus it is recognised that regeneration of further sites within Central Park is unlikely to occur at such scale.
- 8.17 Lands between the A6010 and the Huddersfield rail line in the west of the Strategic Employment Location appear most in need of renewal, although this area is in multiple ownerships, individual sites are generally small and there is a pocket of residential dwellings. Therefore, any regeneration of this area is likely to be a more piecemeal and longer-term outcome. Council should support and encourage regeneration of sites within this area for B2/B8 employment uses. Proposals that amalgamate sites and that provide a more coherent and integrated layout of this area should be supported.
- 8.18 The Riverpark Trading Estate has recently been acquired by a residential developer. This trading estate is performing poorly and is separated from the core employment areas of Central Park. If this was lost to residential uses, it would not materially impact upon the functions of Central Park as an employment location.
- 8.19 Central Park (North) should continue to be a leading node for the City for office-based uses. This area should be a focus for growth, in particular supporting the digital and creative sector. The market evidence continues to show that out of city centre large scale office schemes are not of interest to developers, due to viability constraints and changing workplace preferences since the pandemic. Proposals that further support the digital and creative sector, enhancing and complementing the offer of Arbata and The Sharp Project at Central Park (North) should be encouraged. This could include

traditional office space, but also studios, serviced offices, digital laboratories. Manchester City Council should ensure that the digital infrastructure is suitable for the needs of the tech sector in this locality.

- 8.20 It is noted that there is a proposal for a TfGM depot in the north-west of Central Park (North). This is a site that has remained undeveloped for many years despite its employment allocation. It does appear to be extraneous to needs for Central Park (North), even with an expanded digital and creative sector, and thus alternative commercial uses may be appropriate if such uses do not impede on the function or amenity of Central Park (North).
- 8.21 Furthermore, while the Strategic Employment Location extends to a site to the west of Monsall Road, it appears that the logical boundary of Central Park (North) would be Monsall Road. Therefore, the parcel to the west should be released for alternative uses.
- 8.22 Council's Employment Land Supply database identifies the potential for some 25,248 sqm of additional office space and 740 sqm of industrial/warehousing space within Central Park. The following table provides adjusted figures, assuming the development of Central Park (North) and the site adjacent to Lowry Park. The Central Park (North) site is assumed to come forward for office space and for the TfGM proposal (which is excluded from the floorspace figure). The site adjacent to Lowry Park is assumed to come forward for industrial/warehousing uses.
- 8.23 The following summarises the potential employment development land within Central Park.

Table 22 – Summary of Development Areas: Central Park Strategic Employment Location

Location	Area (ha)	Potential Floorspace (sqm)
Greenfield/Cleared Sites		
- Central Park (North)	3.42	20,400
- Site adjacent to Lowry Park	2.01	8,040
Derelict Brownfield Sites		
- Nil	0	
Currently Occupied/Useable Buildings		
- Nil (while potential for some regeneration of buildings in west of area, scale of this is very uncertain at this time and likely to be long term)	0	
Total	5.43	28,440

Source: BE Group analysis of sites

* excludes TfGM site and site west of Monsall Road

^ not including floorspace dedicated to TfGM proposal

9.0 STRANGWAYS ECONOMIC IMPROVEMENT AREA

Relevant Policy Documents

- 9.1 Strangeways is a large, diverse area to the north of the City Centre. The following documents are relevant to Strangeways Economic Improvement Area.

Table 23 – Policies and Documents – Strangeways Economic Improvement Area

Document	Comments
Places for Everyone Joint Development Plan	<p>Places for Everyone includes Strangeways as part of the broader Core Growth Area within Greater Manchester, centred on the City Centre but also extending to Central Park and Etihad campus in the east and Trafford Park and Port Salford in the west. The document identifies this area as of a huge scale and diversity of economic and residential opportunities, which is accessible from Greater Manchester and wider.</p> <p>Policy JP-Strat1 states that the economic role of the Core Growth Area will be protected and enhanced, supporting major growth in the number of jobs. 'Complementary to, but not at the expense of, its economic function it will see a significant increase in the number and range of homes in areas with good connections to employment, training and education facilities.'</p> <p>The southern part of Strangeways is part of the proposed expansion to the City Centre, and Policy JP-Strat 2 identifies the City Centre as the most significant economic location in the country outside London and will be strengthened considerably. It further states "A broad range of commercial accommodation will be delivered, helping the City Centre to capture growth across key economic sectors."</p>
Manchester Core Strategy 2012 to 2027	<p>The Core Strategy identifies the southern areas of Strangeways as part of the broader City Centre Fringe area alongside Collyhurst, Ancoats, New Islington, and Manchester Science Park. Policy EC1 identifies this City Centre Fringe area as providing 25 ha of employment growth between 2010 and 2027. Policy CC1 identifies this 25 ha employment growth to be for office or similar employment development.</p> <p>The City Centre Fringe areas are expected to increasingly have a role over the lifetime of the Core Strategy to provide for City Centre extensions. 'In addition, the Fringe area can offer accommodation to businesses which may suit the central location in policy and operational terms, but would struggle to access City Centre accommodation due to cost.'</p> <p>Policy EC4 covers North Manchester and states that City Centre Fringe areas of Strangeways and Collyhurst would be expected to provide approximately 14 ha of employment land, suitable for office led mixed use development. The policy also states that Strangeways has significant employment and economic development and is 'suitable for retention and growth of general industry, warehousing and distribution.' Strangeways Employment Area is described as the most significant employment location in North Manchester, being a mixed employment area, though historically an industrial/warehouse area. 'This is an area where flexible employment space alongside support services can support entrepreneurship. The Strangeways and Collyhurst City Centre fringe areas are well placed to offer opportunities for regionally significant office development.'</p>

	<p>Policy H4, covering housing for North Manchester, states that high density housing will be permitted within or adjacent to the parts of North Manchester that are within the Regional Centre, which includes Strangeways and Collyhurst. Within Strangeways, housing is only permitted in the City Centre fringe area.</p>
UDP Extant Policies – Area 2 Cheetham and Crumpsall	<p>The UDP identifies Strangeways as an Economic Improvement Area, with this site being CC10 within the Cheetham and Crumpsall area. The UDP states that Council will 'encourage the continued high level of economic activity in Strangeways and lower Cheetham Hill Road areas, recognising particularly the needs of the wholesale trades which dominate these areas.'</p> <p>The regional importance of this area is recognised in the policy. Council will 'pursue policies designed to improve the efficiency of existing businesses (notably wholesale cash and carry and bulk distributive trades), by environmental improvements and better parking and servicing.'</p>
Strategic Regeneration Framework for Strangeways and Cambridge – Consultation Draft, February 2025	<p>The draft Strategic Regeneration Framework is out for consultation in early 2025. It has been jointly prepared by Manchester and Salford City Councils to guide development and investment in the area over a 20-30 year period. The Framework recognises that Places for Everyone identifies this area within the Core Growth Area and thus Strangeways and Cambridge will have a fundamental role in the growth and evolution of the city centre and the wider Greater Manchester economy.</p> <p>The Framework sets out a vision for the area and objectives to meet the vision. The vision for Strangeways and Cambridge is:</p> <p>'Delivered through a series of connected and unique neighbourhoods, the Strangeways and Cambridge area will be a vibrant and exciting extension to the City Centre, supporting and enabling Manchester and Salford's growth ambitions.</p> <p>Catalysed in the long-term by the potential relocation of HMP Manchester, the success and resilience of the area will be secured through a phased delivery of nationally significant programme of public and private investment. This investment will enable the existing business base to grow, and economic activity to intensify, whilst new green and open spaces will be created for the benefit of both existing residents and those set to move into the area and into the thousands of new market and affordable homes set to be built.</p> <p>Whilst the change envisaged in this SRF is a long-term ambition that will materialise incrementally, it has already begun – the start of another chapter in the evolution of Strangeways and Cambridge.'</p> <p>Objective 1 is Evolving the economic contribution of the area, which sets an ambition for new, improved and intensified employment spaces, which support existing businesses to grow, create room for innovation, improve business resilience and harness the creative spirit of entrepreneurs. It is envisaged that there will be high value economic and employment opportunities in the area. This will be realised through several means, including the delivery of new, modern floorspace to meet business needs.</p> <p>The Spatial Framework identified five neighbourhoods within the area and provides estimated development outputs for each area (Figure 4.1 of the document). For commercial floorspace, this includes:</p> <p>Overbridge: just under 70,000 sqft (6,500 sqm) of clean business space.</p>

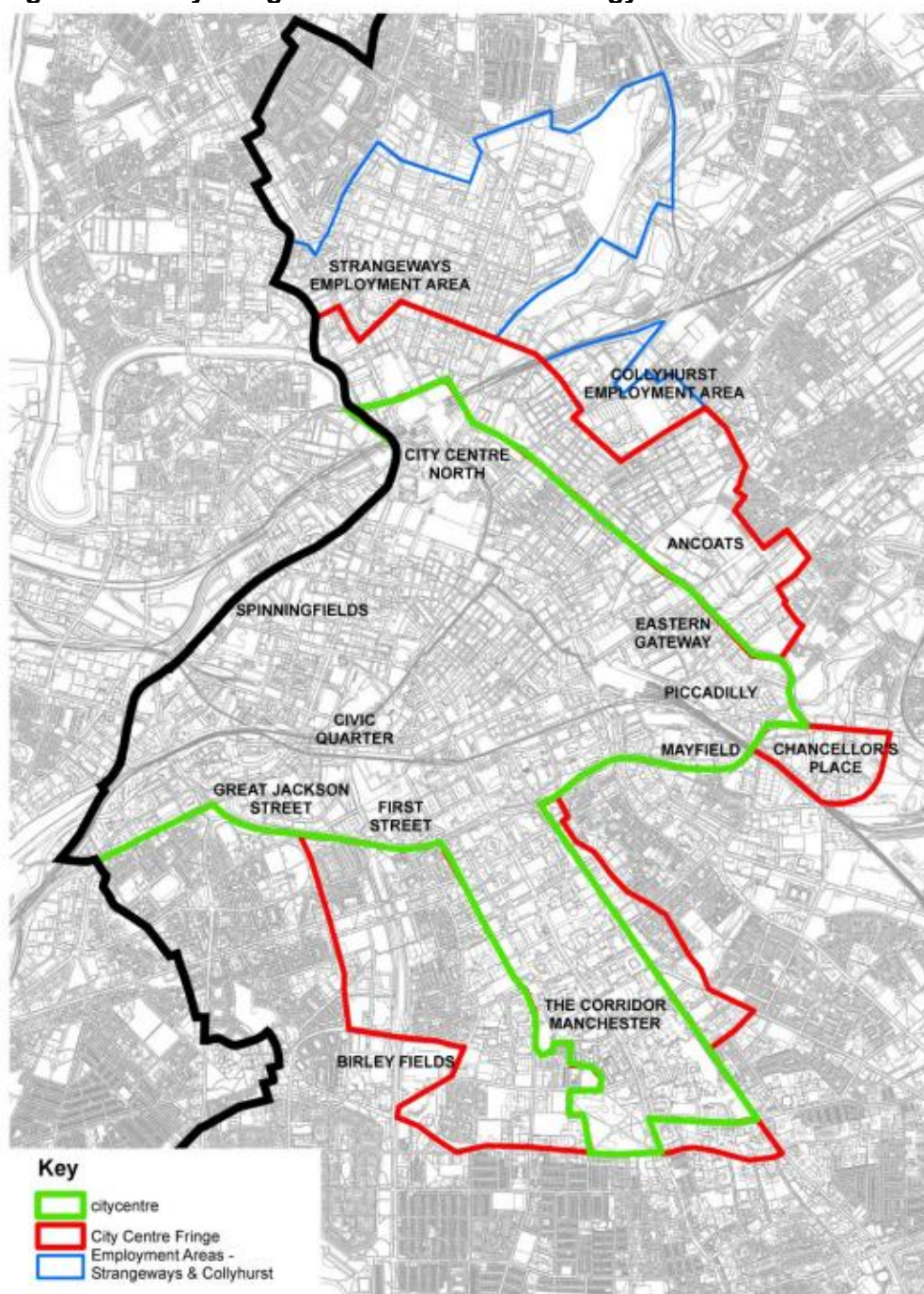
	<p>Cheetham Park: just under 7,000 sqft (650 sqm) of clean business space.</p> <p>Copper Park: regional open space.</p> <p>Dutton Street: across Strangeways and Cambridge and Great Ducie Street Frameworks, potential for 3,000,000 sqft (280,000 sqm) of new commercial space, which is estimated to be an increase of about 1,750,000 sqft (160,000 sqm) on existing levels.</p> <p>Derby Street and Lord Street: no development outputs anticipated beyond redeveloping existing areas and intensification and reuse of vacant/derelict sites, which could yield 28,000 sqft (2,600 sqm) of clean business space.</p>
Strangeways and Cambridge Economic Study, October 2024	<p>The Economic Study was prepared to inform the Strategic Regeneration Framework. It provides a detailed overview of the socio-economic and demographic characteristics of the residential and workforce populations. The report found that GVA and employment growth in the area was stronger than regional averages, though productivity of floorspace and employment was lower than regional averages and the neighbouring city centre. Consultations identified businesses that would making do with suboptimal premises.</p> <p>The report concluded that the wholesale and distribution economy, traditionally predominantly for textiles, remains solid, although the wholesale and distribution economy has broadened to include other products. Despite its current strength, changing market forces means less certainty for the sector in this location and the report suggests that this might lead to emerging needs/opportunities for other types of activities to grow. The report identified the following emerging activities in the area – creative production, entertainment/culture, banqueting halls, and leisure, health and fitness.</p>

Source: BE Group commentary on above documents

Spatial Overview

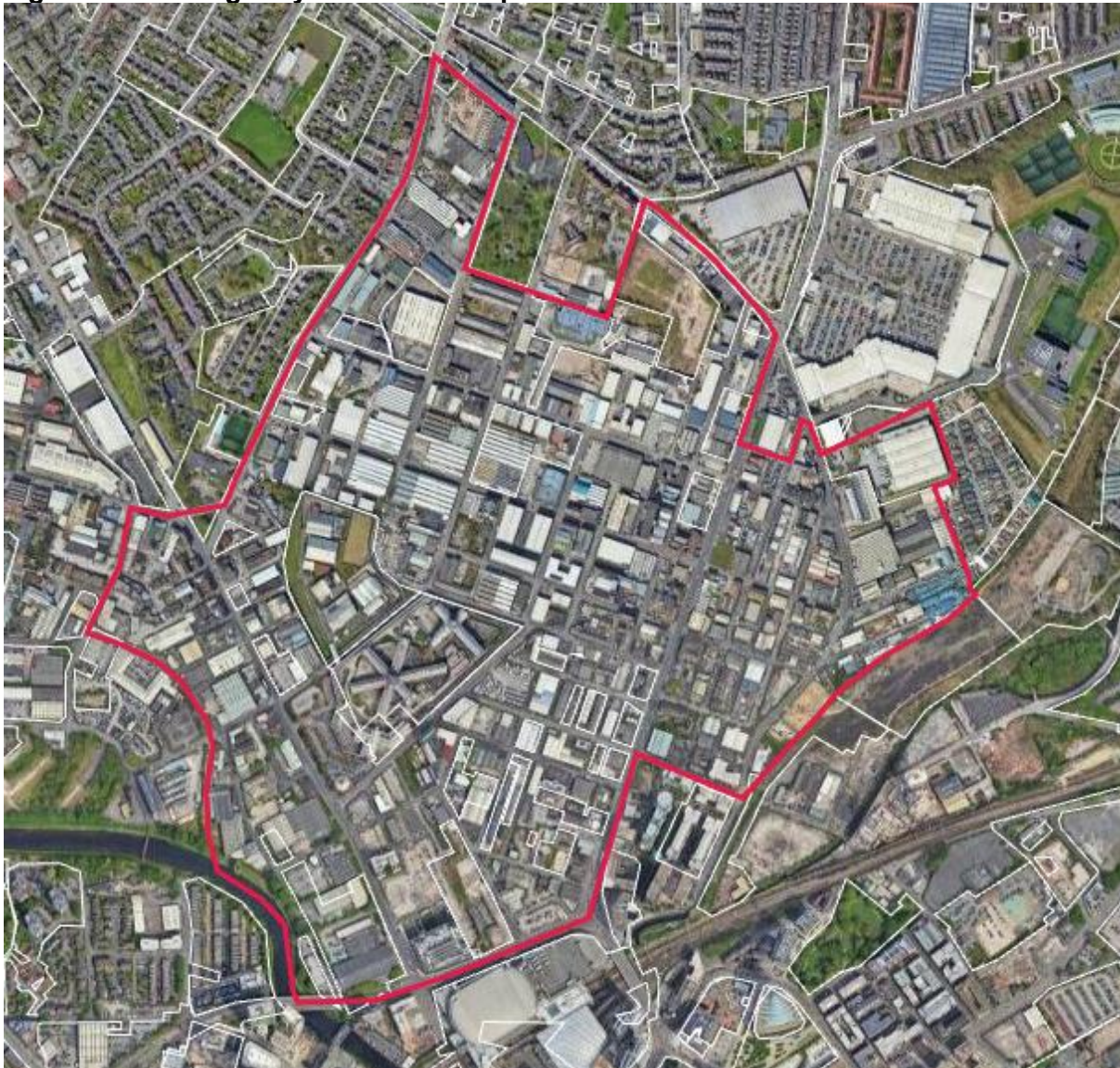
- 9.2 Strangeways Economic Improvement Area is a large agglomeration to the north of the City Centre. Figure 19 is an illustration from the Core Strategy, identifying the City Fringe Areas, including Strangeways. Following this is the current definition of the Economic Improvement Area and its position in the wider area.

Figure 19 – City Fringe Areas from Core Strategy



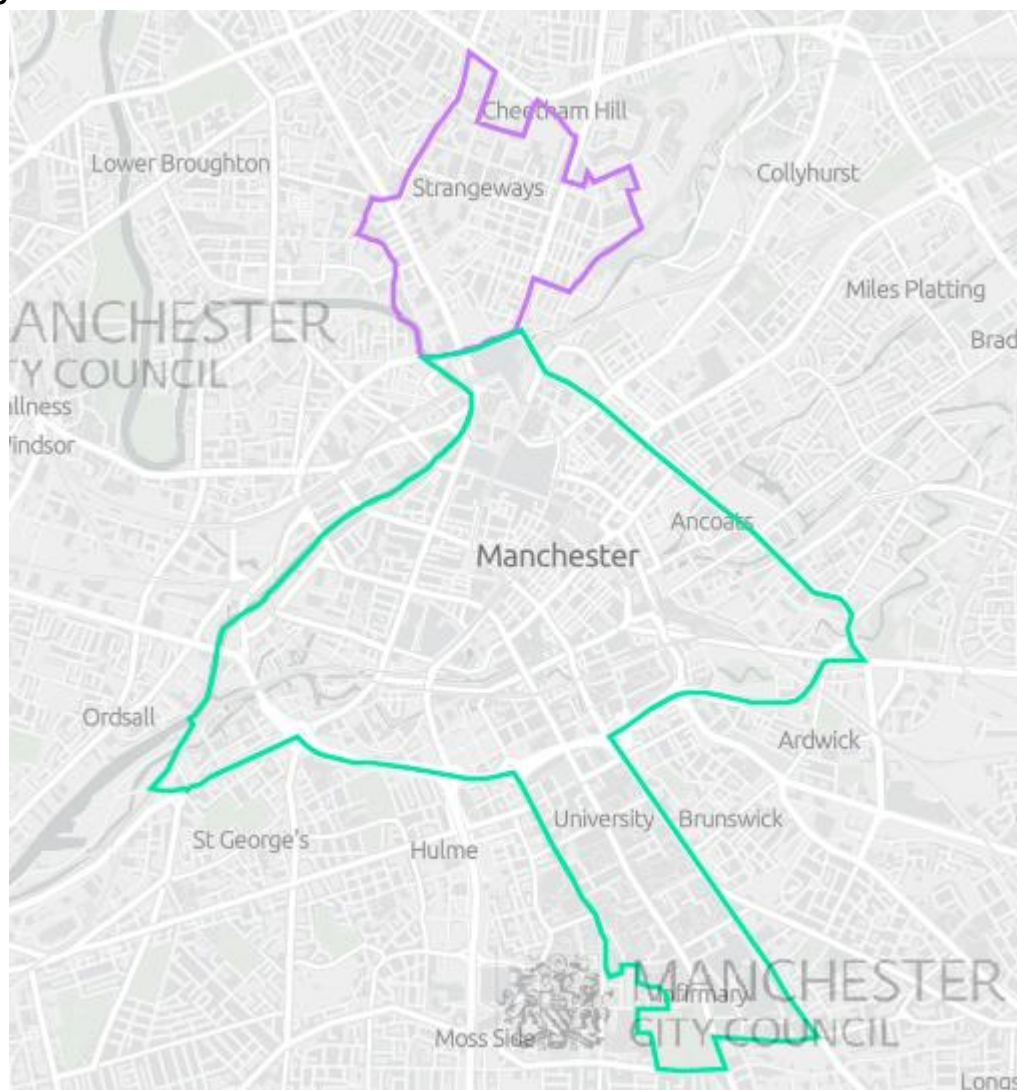
Source: Core Strategy (Figure 8.2)

Figure 20 – Strangeways Economic Improvement Area



Source: Manchester City Council, 2024

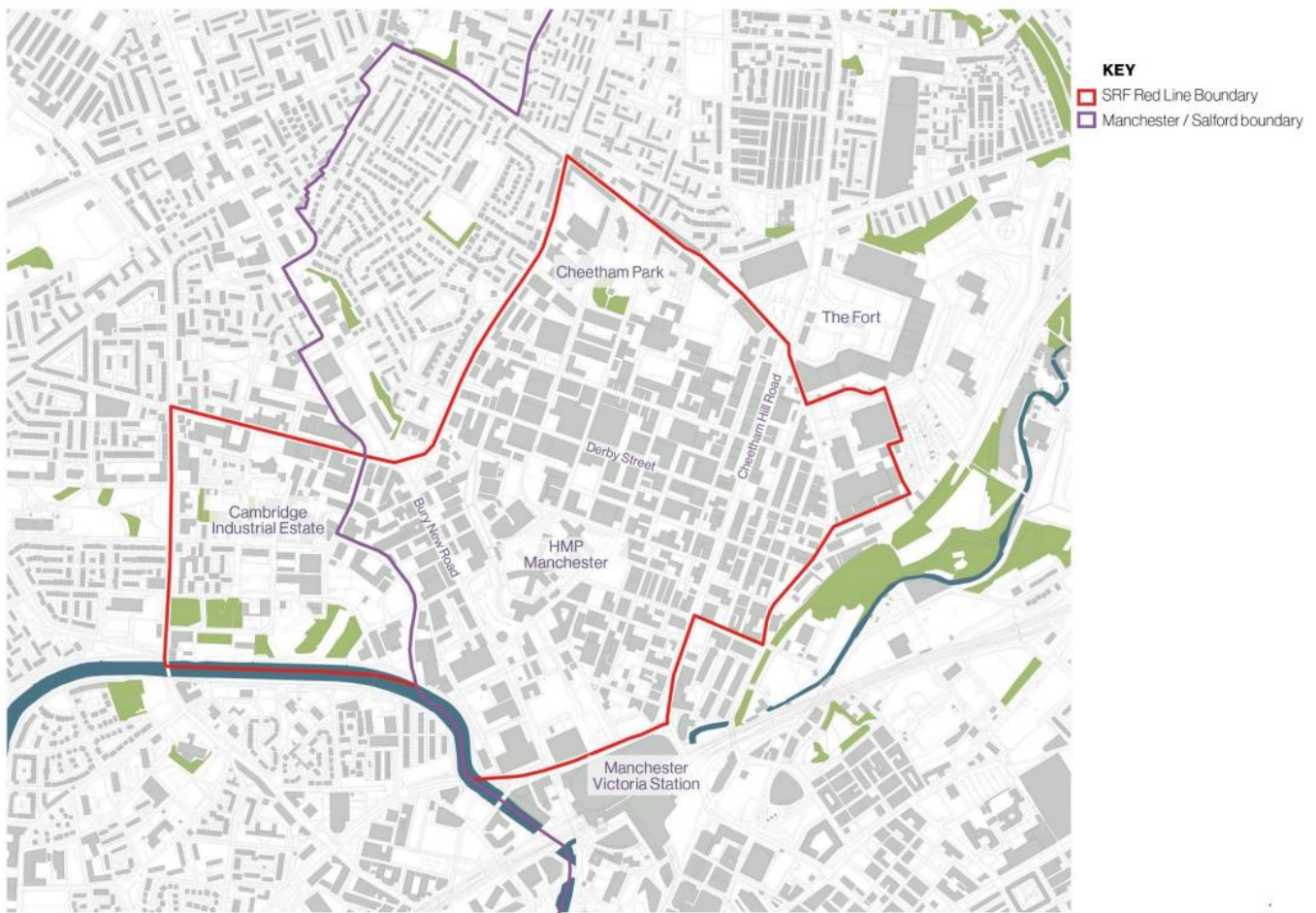
Figure 21 – Strangeways Economic Improvement Area in Relation to City Centre



Source: Manchester City Council, 2024

Figure 22 – Strangeways and Cambridge Strategic Regeneration Framework

Area



Source: Strategic Regeneration Framework for Strangeways and Cambridge, Consultation Draft, Figure

1.1

9.3 Strangeways Economic Improvement Area is a very large, disparate area comprising over 2,400 properties. The bulk of uses are a wide variety of commercial and employment uses, though some significant newer residential developments have emerged closer to the City Centre, in areas within the City Centre Fringe area as recognised in the Core Strategy.

9.4 The key arterials through this area are Bury New Road (A56) and Cheetham Hill Road (A665), which roughly frame the site. Internal roads are generally on a grid system, though some minor roads are narrow and crowded due to on-street parking, which also encroaches onto many pavements and compromises active travel options. It is understood there is a degree of on-street 'parking stress' in some parts of Strangeways, particularly on some roads adjoining Cheetham Hill Road, where large numbers of workers seek space alongside commuters working in the City Centre.

- 9.5 The quality of buildings is generally basic to moderate, although there have been some newer buildings developed, particularly closer to the City Centre. The buildings within the bulk of the area are low rise, older industrial and warehouse brick buildings. Several of the buildings are in a poor state of repair, with graffiti and poor quality outdoor areas evident. However, some new build industrial units have recently been released in the north of the site, notable Trade City. Some new high-rise residential developments are under construction along Trinity Way, whilst the now-established Green Quarter sits outside the Economic Improvement Area to the east, an area that will over time become more populous with the Red Bank residential development, which is part of Victoria North neighbourhood.
- 9.6 Overall occupancy levels within this area are difficult to determine. Many buildings are shuttered, though appear to be occupied. Certain locations within Strangeways, particularly along Bury New Road, have in recent years suffered from extensive criminality, much of it centred on counterfeit goods, which has impacted on how buildings are used and their occupancy levels. A multi-agency campaign led by GMP to remove this activity, Operation Vulcan has had considerable successes and crime rates have reduced. This intervention has provided a platform for the significant physical transformation required, and has been a necessary precondition for long-term public and private investment within Strangeways. In the short term, however, the removal of illegal activity has left a high level of vacancy and in some cases dereliction, and also negatively impacted on legitimate traders. The Council is considering ways to address this as part of the wider regeneration of Strangeways and the adjoining Cambridge area within the boundary of Salford City Council.
- 9.7 The Economic Improvement Area has a significant cluster of textile/apparel wholesalers and distributors, however these sectors are seeing a degree of shrinkage over time, albeit from a very large base. There are various structural reasons for this, including the rise of e-commerce and generational change within many businesses. In some cases, businesses are moving into wholesale of other products, a notable example being the cluster of vape distributors, particularly in the west of the Area (around Moulton Street and Overbridge Road).
- 9.8 Land ownership across the area is complex, with many small landholdings and multilayered leasehold and freehold arrangements. Manchester City Council has ownerships throughout the Economic Improvement Area of sites at various scales, particularly to the west of Bury New Road, in the south of the Area.


- 9.9 HMP Manchester (Strangeways Prison) is a large prison on an 8.1 ha site in the centre of the Economic Improvement Area. This creates a physical and perceptual barrier to any wider redevelopment of the area, and the City Council has for some time made clear its desire to see the prison relocated. At present, the Ministry of Justice has no plans to move or close the prison, and no such changes feature in the government's recently announced 10-year Prison Capacity Strategy. It is hoped by the Council that the forthcoming Spending Review and review of prison capacity may facilitate a decision on the long-term future of the site.
- 9.10 Whilst many car parks have been replaced to allow new development, the southern areas of the Economic Improvement Area still have a significant number of privately run car parks, offering generally more affordable car parking than available in the City Centre. These car parks are of varying size and have low levels of amenity, and in some cases derive most of their income from parking related to events at the nearby AO Arena.

Employment Land

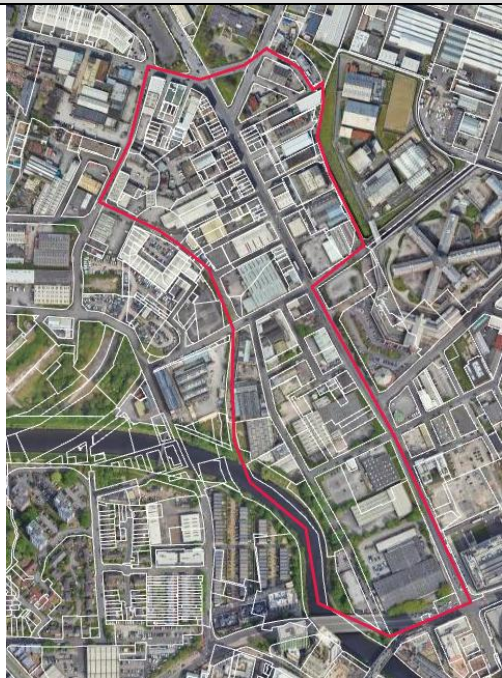
- 9.11 The table overleaf assesses the Economic Improvement Area by subarea, which are localities of similar market performance or potential economic outcomes.

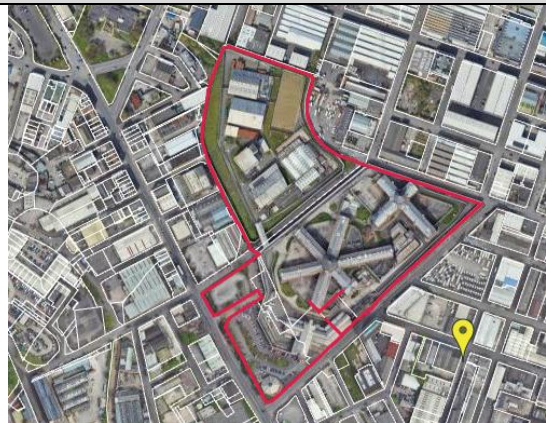
Table 24 – Employment Land Assessment, Strangeways Economic Improvement Area


Site Name/ Address	Baseline Employment Land (ha)	Description	Constraints	Planning Applications/ Permissions	Development Opportunities	Realistic Employment Land Supply, ha	Recommendations
Area bounded by Great Ducie Street/ Bury New Road, Trinity Way, Cheetham Hill Road, Empire Street and Southall Street	16.1	<p>This area is a high-profile zone on the edge of the City Centre and prominence to key arterials connecting to the Centre. This area is currently undergoing some significant regeneration on the back of the 2018 Great Ducie Street SRF, with a major residential scheme and an expansion of Manchester College along Great Ducie Street.</p> <p>Away from the main arterials, there are a number of older industrial and warehousing units of a poor quality. There is significant potential for further regeneration within this area, though in many cases site assembly could be an obstacle to wholesale, comprehensive development. Several small, at-grade car parks are located in this area, and it is anticipated that they will be redeveloped for higher order uses.</p> <p>The Draft SRF for Strangeways and Cambridge anticipates substantial commercial floorspace in this area (Dutton Street Neighbourhood Area), of about 160,000 sqm of additional floorspace above current levels.</p> <p>HMP Manchester is adjacent to this area. The outcome of the prison and any reuse of the site would have a significant impact on the desirability of this area as a location for investment.</p>	<p>Many small, disparate ownerships</p> <p>Parking stress</p> <p>Poor environmental quality (e.g. litter, poor streetscape)</p>	<p>The schemes under construction are the key planning permissions in recent years, with residential applications and consents now also coming forward on Cheetham Hill Road. Some change of use schemes have included warehouse units to indoor sports or leisure uses (padel tennis, climbing, gym), though these are temporary uses to provide the landholders with an ongoing income.</p>	<p>This area has substantial potential for further regeneration. Sites more internal to this area (i.e. not with Great Ducie Street or Cheetham Hill Road frontage) may prove to be secondary sites for development, which is likely to take longer to occur. Sites at the southern end of Cheetham Hill Road will see higher density, residential-led development in line with the 2018 SRF, and will come to reflect the scale of the Green Quarter to the east. (outside the Economic Improvement Area).</p> <p>The array of car parks within this area has the potential for higher and better uses and could form a starting point for wider site assembly.</p> <p>The development of much this area is likely to be for a City Centre mix of uses, including offices, residential and leisure, given that the proposed revised City Centre boundary will encompass this area as far as Lord Street Therefore, it should be expected that some net employment land would be lost in this area as it is regenerated, though as development intensity</p>	<p>Highlighted area represents approximately 3.9 ha (gross) and while occupied and in multiple uses, could be a focal area of the next stage of regeneration.</p>	<p>Continue to allow for appropriate regeneration of this area for mixed-use schemes, including those that are employment (office) led.</p> <p>Work with landholders and developers to identify potential areas of site assembly. The draft Strangeways and Cambridge SRF provides more detail on the mix of uses for this area as part of a larger City Centre.</p>


Site Name/ Address	Baseline Employment Land (ha)	Description	Constraints	Planning Applications/ Permissions	Development Opportunities	Realistic Employment Land Supply, ha	Recommendations
					is expected to increase, and with commercial uses potentially at ground and lowers floors as per the extant SRF, it is not expected that there would be a net loss of employment floorspace.		
Area west of Bury New Road/Great Ducie Street from Trinity Way to Broughton Lane and East of Bury New Road from Sherborne Street to Waterloo Road	16.3	<p>The area west of Bury New Road/Great Ducie Street is a mix of wholesale, warehousing and retail uses. There is a cluster of vape and discount goods wholesalers throughout this sub area, and retail outlets of various quality. Other uses of warehouse units include temporary uses, such as a trampoline centre and a church.</p> <p>A notable use along Bury New Road is the two banqueting halls, catering both to local residents as well as weddings and events from a customer base across the North West. There are also a small number of cafes and food outlets along the main road.</p> <p>Minor/side streets are generally narrow with high levels of on-street parking, with low levels of legibility and a poor environmental quality, in terms of littering, fly tipping etc.</p> <p>Buildings are generally of a poor to moderate quality. This includes premises in high profile</p>	<p>Flood Zone</p> <p>Narrow roads</p> <p>Complex ownerships</p>	Recent applications have been for relatively minor schemes, such as conversion to sui generis or café uses for small units along Bury New Road.	<p>Overall, there appears to be a clear need for regeneration of this full subarea, to significantly improve the amenity of the area, as identified in MCC's 2018 SRF. Development proposals would need to take into account the flooding constraints throughout this area.</p> <p>Site amalgamation would be important in order to deliver comprehensive development at scale.</p> <p>Alternative uses in the southern half of the site (closer to the City Centre and River Irwell) are more likely to be mixed use schemes, taking advantage of River Irwell location and opposite new residential developments on Great Ducie</p>	<p>The southern part of this area within the Great Ducie Street SRF area should be considered for regeneration in the planning timeframe to 2040, though this is likely to be difficult to achieve.</p> <p>Not all of this area would remain as employment uses, with a broad mix of uses anticipated in</p>	<p>Allow appropriate regeneration of this area for mixed-use schemes in the expanded City Centre boundary, and more commercially focused in the northern half beyond the expanded boundary.</p> <p>Work with landholders and developers to identify potential areas of site amalgamation.</p>

Site Name/ Address	Baseline Employment Land (ha)	Description	Constraints	Planning Applications/ Permissions	Development Opportunities	Realistic Employment Land Supply, ha	Recommendations
		<p>positions along Bury New Road/Great Ducie Street and on the minor streets.</p> <p>This area includes much of the Overbridge area within the draft SRF, which anticipates just under 6,500 sqm of additional commercial floorspace.</p> <p>The southern part of this subarea has frontage to the River Irwell, and on the opposite side of the River (outside of the Economic Improvement Area and in Salford City), there are residential dwellings. A pedestrian walkway crosses the River from just outside the Economic Improvement Area boundary. Most of this subarea is within a flood zone.</p> <p>HMP Manchester is adjacent to this area. The outcome of the prison and any reuse of the site could have a significant impact on the desirability of this area as a regeneration site and if relocated could provide a substantial boost to developer interest.</p>			<p>Street. Further north, there would be opportunities for more commercial-led schemes, which include trade-counter, wholesale, showroom or light industrial uses in a higher amenity and modern hub.</p>	<p>the Core Strategy for this City Centre Fringe area.</p> <p>An exception would be the area around Jury Street to the east of Bury New Road. This sub area is immediately adjacent to the HMP Manchester and its future development will need to be driven by what happens on the prison site. Given the likely timescales around any decision on the prison's future, this area is anticipated to remain employment / commercial in focus.</p>	

Site Name/ Address	Baseline Employment Land (ha)	Description	Constraints	Planning Applications/ Permissions	Development Opportunities	Realistic Employment Land Supply, ha	Recommendations
							
HMP Manchester	8.1	HMP Manchester encompasses this full sub area. This is a predominantly Victorian era prison comprising multiple buildings on either side of Sherborne Street. Several of the buildings are of heritage value.	Flood Zone (in part – the car park on Bury New Road)	No significant applications relevant to this study (some related to the Listed status of the building).	<p>Redevelopment of the prison site would have the potential to provide a catalytic effect for the entire Economic Improvement Area, particularly the two adjacent subareas reviewed above.</p> <p>A site of this scale provides an opportunity for a comprehensive, major, mixed-used development to come</p>	0 (not released by the Ministry of Justice at this time)	<p>Continue to lobby the Ministry of Justice for a determination of the long-term future of this site.</p> <p>Consider preparing a high-level masterplan / business case for the site once the</p>

Site Name/ Address	Baseline Employment Land (ha)	Description	Constraints	Planning Applications/ Permissions	Development Opportunities	Realistic Employment Land Supply, ha	Recommendations
					<p>forward. Such a scheme would require full masterplanning.</p> <p>Employment options could be supported on this site under a full redevelopment.</p> <p>Any masterplanning and redevelopment work would need to await a MOJ decision on the ongoing need for its prison use.</p>		future of the site is known and prior to release of the site to demonstrate potential alternative uses.
Area bounded by Cheetham Hill Road, Lord Street, Red Bank and Rayburn Way.	17.5	<p>Large area to the east of Cheetham Hill Road. The bulk of this sub area are comprised of small to medium industrial and hybrid office/industrial units. These units are of a basic to moderate quality, though generally in a better state of repair than the quality on the western side of Cheetham Hill Road, though poor quality in the north-west of the subarea. Most of this section comprises roads in a grid layout, with widespread on-street parking creating significant parking stress and. Some refurbished units have been reoccupied for high-value SME uses. As across other sub areas in Strangeways, there are notable heritage buildings, including the Manchester Jewish Museum.</p> <p>Along Cheetham Hill Road is a mix of retail, showrooms, places of worship, food and beverage and takeaway outlets. There are understood to be a small number of flats that have been established through Permitted Development.</p>	<p>Heavily used roads for parking and servicing</p> <p>Many small ownerships</p>	Small approvals only, in recent years, including change of use applications for B8, sui generis and mixed-use schemes (creative hub)	It would be expected that this area would remain functionally the same, comprising a mix of employment uses. However, refurbishment and regeneration of older stock should be encouraged to better meet modern business needs and to facilitate greater intensity of use. Such an improvement may also encourage high value sectors to locate here from City Centre or other locations	Refurbishment and redevelopment of older employment stock for new employment uses, though unclear as to extent. Some evidence of this already occurring.	<p>Encourage refurbishment programme of existing buildings.</p> <p>Work with landholders to improve building frontages and yards.</p> <p>Work with landholders and developers to identify potential areas of site amalgamation.</p>

Site Name/ Address	Baseline Employment Land (ha)	Description	Constraints	Planning Applications/ Permissions	Development Opportunities	Realistic Employment Land Supply, ha	Recommendations
		<p>MCC has a small number of small landholdings in this area, with the bulk of this area in private ownership.</p> <p>South of this subarea has seen significant levels of investment for high-rise residential developments (Green Quarter, adjacent to the Economic Improvement Area boundary). Significant further homes along Red Bank as part of Victoria North, will come forward, outside the boundary but in close proximity, which could have benefits for businesses serving a residential population (e.g. retail, F&B).</p> 					

Site Name/ Address	Baseline Employment Land (ha)	Description	Constraints	Planning Applications/ Permissions	Development Opportunities	Realistic Employment Land Supply, ha	Recommendations
Area bounded by Empire Street, Cheetham Hill Road, Elizabeth Street, Cheetham Park and Waterloo Road	39.8	<p>Large subarea comprising the northern half of the Economic Improvement Area. This locality has a grid layout of broad streets, which aid access and servicing but present a challenge to the introduction of active travel. Heritage buildings include the Joseph Holt Brewery, a major and long-standing business within Strangeways.</p> <p>This subarea contains a significant cluster of apparel wholesalers and retailers, including discount and imitation ware. There is an eclectic mix of operations in this locality, with shopfronts, alongside warehousing and manufacturing units. Most units are 1-2 storeys.</p> 	On street parking	<p>B2/B8 units approved and under construction on the southern side of Elizabeth Street in the north of the site (Application 133125/FO/2022).</p> <p>Several small to medium approvals for change of use to cash and carry/wholesale uses (sui generis).</p>	<p>This area is a lower priority within the Economic Improvement Area for significant regeneration, given buildings are of a moderate quality and this subarea is further away from the City Centre.</p> <p>However, some refurbishments and redevelopments would still be anticipated, to renew older building stock. The functionality of this area is expected to remain largely as a wholesalers and mixed-use node, but other sectors may locate to this area as the building stock improves.</p>	Refurbishment and regeneration of occupied sites throughout this area.	<p>Support further refurbishments and redevelopments that improve the built stock but do not impact on the overall functionality of the area.</p> <p>Support development of ancillary/support services that enhance the overall function.</p>

Sources: LandInsight, MCC, commercial agent websites, BE Group analysis.

Development Potential

- 9.12 The Strangeways Economic Improvement Area is a very large (approximately 98 ha), disparate area with a sizeable, long-standing business base (numbering nearly 3,000 businesses) with a significant number of employees (circa 12,800). Whilst a substantial number of buildings are in need of renewal or refurbishment, the Area has an important function to play in the future growth of the City Centre and the growth of the Manchester and GM economy.
- 9.13 Development opportunities are more likely in the southern areas of the Economic Improvement Area, with closer connectivity to the City Centre, as is evidenced by the construction currently underway along Trinity Way of over 800 new homes. It is likely that development opportunities would be for a wider mix of uses than purely E(g)/B2/B8 uses, with significant opportunities for residential as part of mixed-use schemes within the expanded City Centre boundary along Great Ducie Street/Bury New Road and Cheetham Hill Road, as well as fronting River Irwell. Therefore, this area will see development that will incorporate a wide range of uses of a higher intensity. An expanded indicative boundary of the City Centre is shown in Places for Everyone and the Manchester Economic Strategy has also proposed an extended City Centre boundary which could incorporate some of the Strangeways areas closer to the City Centre. This has the potential to provide wider market opportunities for redevelopment of this area.
- 9.14 The HMP Manchester site represents a regeneration site of City-wide importance, if it becomes available. It could be the key catalyst to drive substantial wider regeneration if it is released, and the Council should continue to pursue this objective through engagement with the Ministry of Justice. Commercial agents report that the relocation of the prison is vital for wider regeneration of this area. However, at this stage it remains unavailable and regeneration of other areas should be brought forward regardless of the future of the HMP Manchester site.
- 9.15 Given its location, the existence of key arterial routes and proximity close to the City Centre, Strangeways would be a potential location for any 'last mile' logistics hubs or similar operations. Whilst the sector is in its infancy, it chimes with the historic distribution function of the Area and such hubs can service both the residential and commercial population of the City Centre, potentially reducing large vehicle movements and aiding the Council in its wider movement strategy.

- 9.16 Regeneration of the Economic Improvement Area provides an opportunity to secure more productive uses of land at key locations, and facilitate the introduction of higher value uses and sectors alongside the sectors and uses that have historically dominated Strangeways. The cluster of lower value operations and areas of vacancy west of Great Ducie Street/Bury New Road within the proposed expanded City Centre boundary – the area of focus for Operation Vulcan – should be a focus of regeneration, including higher-density, mixed-use schemes that provide a more appropriate range of businesses for a fringe of City Centre location. The apparels wholesale cluster in the north of the Economic Improvement Area will continue to modernise and evolve in order to compete in the modern market, while maintaining its local character and identity.
- 9.17 Council's Employment Land Supply database identifies the supply potential of the Strangeways area as some 125,891 sqm of office space and 11,771 sqm of industrial/warehouse space.
- 9.18 The table below lists the estimates of potential changes in commercial floorspace areas within the draft Strangeways and Cambridge Strategic Regeneration Framework area. As can be seen, this significantly above what was envisaged in the Employment Land Supply assessment in terms of overall floorspace, though includes a wider definition of commercial floorspace uses. While providing a good guide as to overall intents for the area at this time, this Framework is still in draft form and is to guide development over a 20-30 year timeframe, rather than the planning horizon to 2040 that this Employment Land Review is assessing.
- 9.19 There are few imminently available or derelict sites within the area, though the significant majority of the area could be viewed as in need of regeneration within this planning period. Therefore, site preparation and assembly will be a key consideration and constraint on delivery for the potential commercial floorspace as envisaged by the draft Framework.

Table 25 – Summary of Development Areas: Strangeways Economic Improvement Area

Neighbourhood Area	Change in Commercial Floorspace (sqm)	Types of Commercial uses envisaged
Overbridge	6,500	Ground floor food and beverage, retail; some upper floor employment
Cheetham Park	650	Commercial hub within the park
Dutton Street	160,000	Mixed-use neighbourhood of a density commensurate with the City Centre. Employment at ground floor and upper floors, including around 30 storeys. Mixed with high density residential.
Derby Street/Lord Street	2,600	Derby Street: Small and medium light industrial and warehousing; upper-level workshops, studios and flexible offices. Lord Street: Business space or amenity retail.
Total Floorspace Change	169,750	

Source: Strategic Regeneration Framework for Strangeways and Cambridge, draft

- 9.20 In the consideration of office and industrial/warehousing space availability for the purposes of this Employment Land Review, it is assumed that the Overbridge and Cheetham Park commercial areas would be taken up by uses other than office and industrial. The Dutton Street commercial allocation could be assumed to be all office space (though ground floor may be other uses) and the Derby Street/Lord Street could be assumed to be a mix of industrial and office space.

10.0 NORTH MANCHESTER GENERAL HOSPITAL

Relevant Planning Documents

- 10.1 The following table provides the summaries of the relevant policies and relevant documents specific to North Manchester General Hospital.

Table 26 – Policies and Documents – North Manchester General Hospital

Document	Comments
Places for Everyone Joint Development Plan	<p>The North Manchester General Hospital site is within the Inner Areas area, defined in Places for Everyone</p> <p>Policy JP-Strat 5 states that the ‘continued regeneration of the inner areas will be promoted and will be linked to reducing levels of deprivation and poverty and supporting the improved health and wellbeing of the communities. High levels of new development will be accommodated in this highly accessible and sustainable location.’ The growth and development of the hospital can support these outcomes.</p>
Manchester Core Strategy 2012 to 2027	<p>The Core Strategy does not provide an explicit outline of development intents for North Manchester General Hospital.</p>
North Manchester General Hospital Site Redevelopment Programme – Strategic Regeneration Framework, March 2021	<p>Manchester University NHS Foundation Trust (MFT) prepared the Strategic Regeneration Framework (SRF) to guide the comprehensive regeneration of the North Manchester General Hospital (NMGH). It identifies that the Hospital has suffered from chronic and sustained underinvestment, with many of the buildings dilapidated and in urgent need of intervention.</p> <p>MCC have partnered with NHS Manchester to undertake the regeneration of the Hospital. The ‘aspiration and vision is to radically redesign healthcare services and provide an integrated health and social care offer at NMGH, which could become an exemplar of the NHS Long-Term Plan.’ The site redevelopment will allow for the co-location of healthcare providers, including hospital, mental health, intermediate and community services and primary care. There would be the opportunity for a wellbeing hub to support people to get well and stay well. This wellbeing hub will link with voluntary, community and social enterprises. Overall, the vision is for a ‘new high quality and sustainable civic campus where people will want to get well, learn, work, and live rather than just a hospital complex.’</p> <p>An education hub is proposed for the site to enable healthcare training that can result in employment within the NMGH site. However, this hub would also be available for other agencies to support employment and skills development. The design and construction of the scheme would also allow for apprenticeships and training on site.</p> <p>The SRF identifies a range of development zones and land uses (development zones illustration from the SRF is replicated overleaf), of which the most relevant for this Employment Land Review is the Healthy Neighbourhood Hub (Z4), which is envisaged for a mixed-use development including housing (especially extra care, assisted housing and worker accommodation) as well as commercial accommodation for innovation and enterprise. Overall, 7 ha is identified for the Healthy Neighbourhood Hub. It is envisaged that the commercial offer ‘has a focus on healthy ageing and provides flexible accommodation suited to companies in different stages of evolution. This would attract businesses</p>

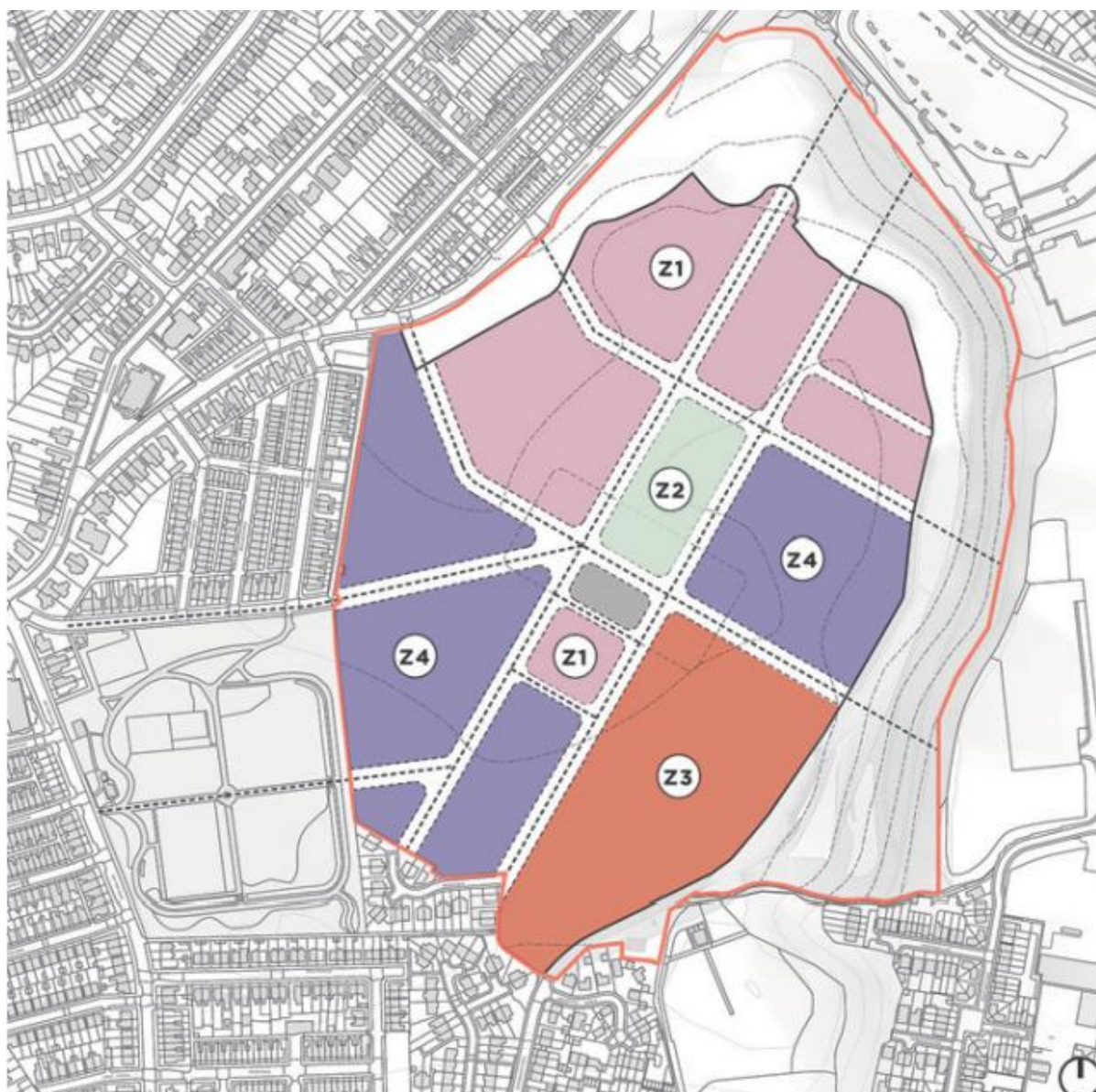
Document	Comments
	and R&D uses to locate themselves at the Site and become the focal point for further development and activities of the Healthy Neighbourhood.'

Source: BE Group commentary on above documents

Spatial Overview

- 10.2 Figure 23 is an excerpt from the Strategic Regeneration Framework and illustrates the development areas proposed. Of key note for this assessment is the Healthy Neighbourhood Hub (Z4).

Figure 23 – Development Zones and Land Uses, NMGH Strategic Development Framework



Source: Figure 7 from North Manchester General Hospital Strategic Development Framework, March 2021

Development Potential

- 10.3 The overall development parameters and direction for the NMGH site is outlined in the Strategic Regeneration Framework. The following provides advice on the development potential for commercial uses within the site.
- 10.4 Innovation can be supported through the provision of laboratory spaces, incubator spaces and shared facilities. Opportunities to link with the Education Hub uses and facilities should be encouraged. Manchester University NHS Foundation Trust as a key partner in the scheme, should facilitate research and innovation within the campus, including bringing in the private sector as research partners. Spaces that support innovation should be encouraged, including spaces that support the commercialisation of research undertaken on site.
- 10.5 Users of the commercial spaces within this area would have an expectation of very high-quality facilities and amenities. The commercial uses would need to be of a scale to be compatible with adjacent residential uses, including high care needs, but also to have sufficient critical mass of workspaces to attract a solid cluster of enterprises. Workspaces should be Grade A spaces, comparable in standard to premium city centre spaces. There should also be excellent connectivity to the wider area, including the City Centre and residential areas. Ancillary retail and leisure should also form part of the mix of commercial uses to service the on-site workforce and residential populations.
- 10.6 Council's Employment Land Supply database identifies 23,360 sqm of office based floorspace for Morth Manchester General Hospital. While the Strategic Regeneration Framework does not provide explicit floorspace capacities or requirements, the Healthy Neighbourhood Hub, at 7 ha and anticipated to comprise a mix of uses, would be consistent with additional floorspace of this scale.

11.0 AIRPORT CITY STRATEGIC EMPLOYMENT LOCATION


Relevant Policy Documents

- 11.1 Airport City has recently been rebranded and relaunched by the joint venture behind the project as MIX Manchester. The policy documents still include the Airport City terminology, with relevant documents reviewed below.

Table 27 – Policies and Documents – Airport City (MIX Manchester) Strategic Employment Location

Document	Comments
Places for Everyone Joint Development Plan	<p>The importance of Manchester Airport is strongly recognised in the Places for Everyone document, including as an employer, economic driver, connector to international markets and asset to attract inward investment. The document states that development will be focused in the Core Growth Area, Manchester Airport and key growth locations.</p> <p>Policy JP-Strat9 (Southern Areas) covers areas including Manchester Airport and recognises the major investment underway at the Airport. The policy outlines transport improvements to and from Manchester Airport to maximise the contribution of the Airport to the wider growth agenda.</p> <p>Policy JP-Strat10 (Manchester Airport) lies within the policy framework of Policy JP-Strat9. Strat10 further outlines economic and transport improvements to better connect the airport to the wider area. 'The benefits of the exceptional connections will be maximised, including by:</p> <ol style="list-style-type: none"> 1. Completing the development of Airport City immediately around the airport, which will provide a total of around 500,000 sqm of office, logistics, hotel and advanced manufacturing space (See Manchester Local Plan); 2. Continuing to develop Medipark and Roundthorn Industrial Estate as a health and biotech cluster, taking advantage of the research strengths of the adjacent Wythenshawe Hospital and the wider Manchester University NHS Foundation Trust ... 3. Delivering around 60,000 sqm of office floorspace around the new Airport Station...; 4. Providing around 1,800 new homes to the west of the M56 at Timperley Wedge, up to 2039; 5. Providing sufficient development opportunities to take full advantage of the introduction of NPR into this location.' <p>Specifically on Airport City, it is described as an emerging development, 'creating a major new economic asset, attracting global occupiers and investment attracted by the unrivalled connectivity.'</p>
Manchester Core Strategy 2012 to 2027	<p>Policy EC10 (Wythenshawe) identifies Manchester Airport and Airport City for aviation related development and a mix of economic development uses including offices, high technology industries, logistics, warehousing and airport hotels. Airport City is recognised as having the potential for bringing international investment to the city.</p>

Document	Comments
	<p>Policy EC11 of the Core Strategy identifies Airport City as a Strategic Employment Location. The policy states that 'The area to the north of Manchester Airport is a significant opportunity for employment development in Manchester. The development of this location will be promoted as the core of a wider Airport City opportunity, promoting functional and spatial links with nearby parts of Wythenshawe to maximise the catalytic potential of the airport to attract investment and increase economic activity.</p> <p>The area is suitable for high technology industries, logistics, offices, warehousing and ancillary commercial facilities which will support further the business destination role at Airport City.'</p> <p>'The Airport City area is able to take advantage of the economic development opportunities presented by the Airport, particularly for businesses which want quick and reliable access to the Airport. It seeks to capture economic growth which would otherwise locate to another region or country, thereby providing a significant increase in inward investment to Manchester.'</p>
UDP Extant Policies – Area 17 East Wythenshawe	<p>The Airport City site is identified as EW8 in the East Wythenshawe policy and is allocated as one of the major strategic sites in the City for high technology industry.</p> <p>The policy states that the site is ideal for such purposes 'in terms of its size, its location in relation to the Airport and to the strategic highway network, and its attractive open setting.' It identifies the site as capable of attracting high quality business uses.</p>
Investing in Success: An Economic Strategy for Manchester	<p>This document highlights Airport City as an area for significant economic growth. Airport City is the first major development scheme listed in the table of development pipeline projects (and largest proposed scheme in terms of employment growth).</p> <p>Priority Two (nurture thriving, productive and innovative sectors) includes a commitment to 'facilitating the development and expansion of Manchester's most innovative places, such as Manchester Science Park, ID Manchester (now Sister), the Oxford Road Corridor and Airport City'</p>
Manchester Airport City North – Masterplan Vision 2023	<p>This masterplan is now out of date with the release of the MIX Manchester masterplan, though provides context for the evolution of the site.</p> <p>The masterplan has the following proposed mix of uses, with the list include the percentage split of development floorspace.</p> <p>Tier 1 Good Manufacturing Practice (GMP): 738,300 sqft (41%) Tier 2 GMP: 369,700 sqft (21%) Mid-Tech: 367,100 sqft (20%) R&D Laboratory: 164,400 sqft (9%) Office/Education: 84,900 sqft (5%) Shared Amenity: 76,000 sqft (4%)</p> <p>Other uses include hotel and car parking.</p>
MIX Manchester Masterplan 2024	<p>MIX Manchester is proposing a new science, innovation and manufacturing campus. The scheme could provide advanced manufacturing, research and development, laboratory and office space alongside complementary hotel and amenity space. It is well placed to complement and support the growth of the region's established life sciences, advanced materials, digital and technology, and clean technology economies.</p>

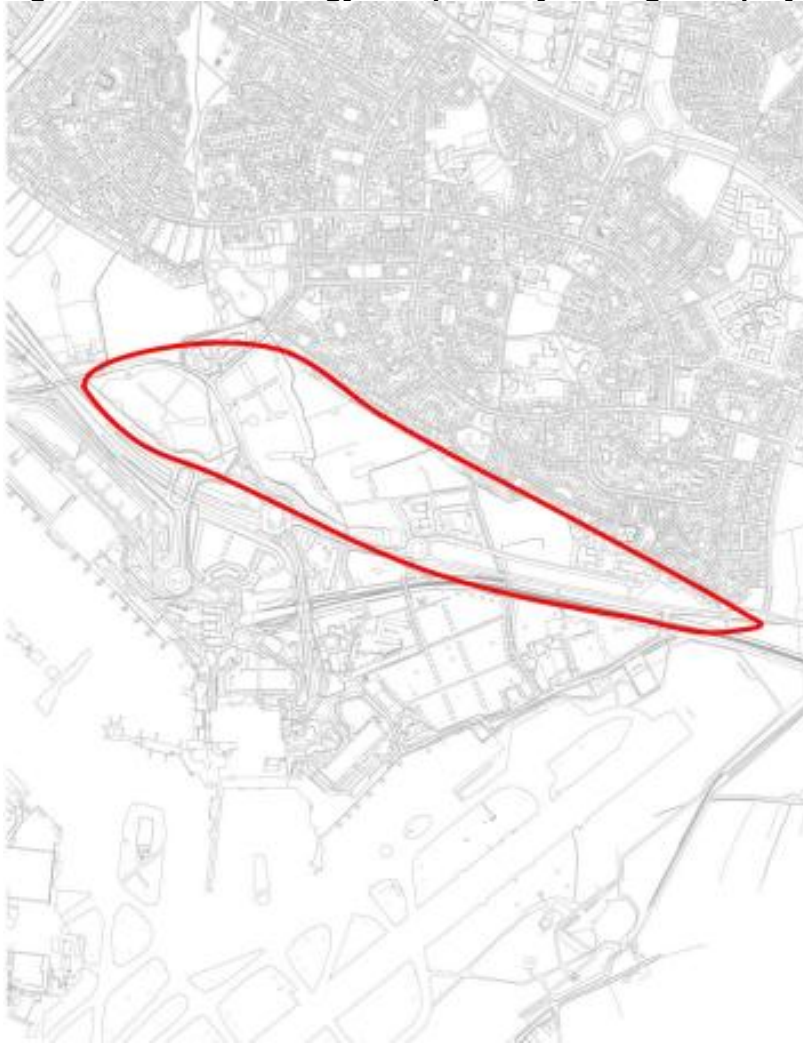
Document	Comments
	<p>The MIX Manchester Masterplan demonstrates that the masterplan proposal is highly geared to manufacturing uses, supported by R&D, with only one plot identified for offices. Overall, the masterplan envisages 2 million sqft (186,000 sqm) of floorspace.</p> 

Source: BE Group commentary on above documents

Spatial Context

- 11.2 The figure below is the defined Airport City Strategic Employment Site within the Core Strategy. Overleaf is the site within the surrounding context and the masterplan for the MIX Manchester proposal.

Figure 24 – Core Strategy’s Airport City Strategic Employment Site



Source: Core Strategy (Figure 8.6)

Figure 25 – MIX Manchester Masterplan Area



Source: MIX Manchester Masterplan website, 2024

Development Potential

- 11.3 The development opportunities of the Airport City site are outlined in the MIX Manchester masterplan. With the substantial joint venture participants driving this plan, including Manchester Airport Group, Columbia Threadneedle Real Estate, Beijing Construction Engineering Group International (BCEGI), and Greater Manchester Pension Fund (GMPF) and supported by Manchester City Council, it has significant funding and support to deliver the project.
- 11.4 Importantly for this employment land study, the focus of the masterplan is overwhelmingly for manufacturing uses, including advanced technologies and research. The intent for this masterplan area is considerably different to other employment areas surrounding Manchester Airport, which are dominated by logistics and warehousing uses. Such areas are nearing completion, with a need for further logistics and warehousing land to come forward for continued growth of this sector. The Airport City North site could potentially accommodate a range of more generic employment uses and be a successful development outcome that would contribute to the overall economic function of the Airport area. However, a generic employment scheme this site would not provide the breadth of other economic and employment

benefits that a more diverse, high-technology scheme would provide for Manchester and the broader region.

- 11.5 A manufacturing-led and research scheme is likely to be a harder development outcome for the site, in terms of attracting the critical mass of businesses to fill the scheme, attracting the private sector and institutional research operators having a sufficient workforce. As seen in the socio-economic analysis earlier in this study, there is a proportionally lower level of science and research employment in Manchester compared with national averages, which means that this development scheme based on a science proposition would be coming from a low base. Furthermore, competition from other regional nodes, such as the vaccine manufacturing hub in Speke that has been awarded budget funding, mean that the MIX Manchester scheme would have to compete fiercely for occupier commitments.
- 11.6 However, a successful realisation of the masterplan proposal would mean that Manchester would have a leading manufacturing and research asset in a prime location that can compete globally. It would provide a very broad range of job opportunities at all skill levels and provide spaces for high growth sectors, including target sectors in the Local Industrial Strategy such as health innovation and advanced materials and manufacturing. A manufacturing focus for this site would enable Manchester to attract leading advanced manufacturing operators to the region and open up opportunities for its higher education sector to expand its integration with industry in advanced materials and technology.
- 11.7 It would be important to ensure that the employment areas within MIX Manchester are very well linked to high quality residential area, services and amenities in order to attract leading workers and businesses.
- 11.8 Council's Employment Land Supply database estimates some 156,824 sqm of office floorspace and 5,309 sqm of industrial/warehouse floorspace for Airport City. However, since the rebranding and MIX Manchester Masterplan has now been released, it is apparent that the 186,000 sqm of proposed floorspace is to be highly geared towards advanced manufacturing uses and research. The breakdown of this floorspace is unknown at this stage and for the purposes of this Employment Land Review it is assumed that it is all dedicated for manufacturing uses.

12.0 UNIVERSITY HOSPITAL SOUTH MANCHESTER STRATEGIC EMPLOYMENT LAND AND PROPOSED MEDIPARK

Relevant Policy Documents

- 12.1 The University Hospital South Manchester Strategic Employment Land (Wythenshawe Hospital) is adjacent to the Roundthorn Economic Improvement Area (reviewed in Chapter 12.0). The Medipark allocation is identified in the Core Strategy and Places for Everyone and has been jointly reviewed within the Hospital site in this chapter.
- 12.2 The following documents are relevant to this analysis.

Table 28 – Policies and Documents – Wythenshawe Hospital and Medipark

Document	Comments
Places for Everyone Joint Development Plan (2024)	<p>Places for Everyone recognises the south Manchester areas as key economic drivers and assets, including Wythenshawe Hospital and Manchester Airport. The document includes support for improved transport links for the Hospital, Medipark and Timperley Wedge (to the south of the Medipark site in Trafford Borough), including Metrolink connections.</p> <p>In discussing the wider Medipark and Timperley Wedge site, Places for Everyone identifies it as a well-connected location to create a new living and working experience providing new homes, jobs and training opportunities. The document states that ‘together, Medipark and Timperley Wedge is one of the very best opportunities for a strategic location in the UK, offering outstanding potential to help the City Region to achieve its ambition.’</p> <p>Policy JPA3.1 covers the Medipark site and states that development on this site will be required to:</p> <ol style="list-style-type: none"> 1. Deliver about 86,000 sqm Class E (g) -focused floorspace; 2. Development should be configured to take advantage of transport infrastructure in the area including the proposed Metrolink Manchester Airport Line Western Leg extension; 3. Deliver a new spine road through the site with connections to the existing road network and JP3.2 Timperley Wedge; 4. Make provision for new and improved sustainable transport and highways infrastructure having regard to the indicative transport interventions set out in Appendix D in accordance with policy JP-C8; 5. Complement the wider Roundthorn Medipark development and the development proposed in Timperley Wedge; 6. Take appropriate account of relevant heritage assets, and their settings, including the listed buildings of Newall Green, in accordance with policy JPP2; 7. Take appropriate account of the adjacent playing field in accordance with policy JP-P7; 8. Take appropriate account of the historic landscape features within the site; 9. Provide a flood risk management strategy, focusing more sensitive development furthest from Fairywell Brook. High quality natural landscaping, including the provision of native species, should be delivered

Document	Comments
	<p>adjoining the brook to help mitigate flood risk and promote biodiversity and green infrastructure; and</p> <p>10. Make provision for compensatory improvements to the environmental quality and accessibility of remaining Green Belt in accordance with policy JP-G2.'</p> <p>Policy JPA3.2 covers the Timperley Wedge site to the south (in Trafford Borough) and envisages that that area will deliver around 60,000 sqm of E(g)(i) office space, of which half would be in the planning period and around 2,500 homes, of which 1,800 homes would be in the planning period.</p> <p>Policy JP-Strat10: Manchester Airport identifies the Airport's excellent connections, including proximity to Wythenshawe Hospital and the Medipark. The policy states that the benefits of these connections will be maximised, including 'continuing to develop Medipark and Roundthorn Industrial Estate as a health and biotech cluster, taking advantage of the research strengths of the adjacent Wythenshawe Hospital and the wider Manchester University NHS Foundation Trust.'</p>
Manchester Core Strategy 2012 to 2027	<p>Policy EC10 of the Core Strategy identifies University Hospital South Manchester as 'suitable for growth related to the healthcare and biosciences and ancillary offices.' It looks to support the connections between the key economic drivers in and around Wythenshawe. The policy states that 'development and infrastructure provision will be supported which strengthens transport connections between Roundthorn Industrial Estate, University Hospital South Manchester, Airport City and Manchester Airport. The Council will seek to maximise the opportunities to enhance this spatial cluster of key employment uses.'</p> <p>Policy EC10 recognises the Hospital as one of three sites in Wythenshawe (along with Manchester Airport and Airport City) as having considerable potential for employment growth. The Hospital is 'expected to develop further as a health facility and presents an opportunity for growth in research and development particularly related to the bio-sciences.'</p> <p>Policy EC12 is specifically focused on the Hospital as a Strategic Employment Location. 'Hospital expansion will include a mix of education and conference facilities, clinical trial labs, fitness/well being centre, an innovation centre, incubator units, an hotel and ancillary offices. Any development will be expected to:</p> <ul style="list-style-type: none"> • Support continued growth and development of the hospital • Assist the continued regeneration of Wythenshawe through enabling access to the facilities and employment opportunities created • Take advantage of the proposed extension of Metrolink and its proximity to the hospital site • Address road access to the site and any conflict between road users.' <p>The policy states that the vision for the Hospital is to 'create an internationally significant 'MediParc' which generates wealth, employment and increased productivity through activities directly linked to research-led healthcare innovation.'</p> <p>This policy supports the delivery of 1.3 ha of employment land at the Hospital in the planning period (2012-2027).</p>
Investing in Success: An Economic	Investing in Success is the Economic Strategy for Manchester and outlines a vision for Manchester's economy to contribute to UK's GDP and provide the best possible opportunities for Manchester's residents. It

Document	Comments
Strategy for Manchester (2024)	<p>outlines five priorities to achieve the vision. Priority 1 is to use investment and development to drive growth and states that the Council commits to 'ensuring that large-scale redevelopment projects outside of the city centre include economic assets that help new and existing neighbourhoods to thrive, such as the Southern Arc area comprising Manchester Airport, Airport City, Wythenshawe Civic Centre and Wythenshawe Hospital.'</p> <p>The document identifies the £1.4 billion proposed investment proposed for the Wythenshawe Hospital site, including at least 800,000 sqft (74,000 sqm) of commercial and industrial space plus key worker accommodation and community care. Priority 2 of the strategy supports this, including committing to building and expanding a potential cluster of businesses at Wythenshawe Hospital.</p>
Wythenshawe Hospital Campus Strategic Regeneration Framework (March 2021)	<p>The Strategic Regeneration Framework was prepared for Manchester University NHS Foundation Trust (MFT) and Bruntwood, which are working in partnership to support the delivery of facilities on MFT's estate, including at Wythenshawe.</p> <p>The Strategic Regeneration Framework outlines a vision for the hospital campus that it will deliver:</p> <ul style="list-style-type: none"> • Exceptional health care and clinical facilities • A sustainable campus in line with MCC's net zero targets • A diversified range of uses in a health village including complementary R&D, offices, hospital-aligned light manufacturing, workspaces, residential linked to the hospital and other complementary uses. • Support for the local community, including access to jobs, health care and social infrastructure • Effective transport and car parking strategies • Access to green infrastructure • A technologically enabled 'smart' hospital • World-class research and innovation • Globally competitive location for complementary businesses • A key part of the wider economic node including Roundthorn Industrial Estate, Timperley Wedge and Manchester Airport/Airport City. <p>The Strategic Regeneration Framework outlines development principles that will deliver this vision (see Chapter 5 of the document). In regard to land use, the development principles include the statement that the primary land uses 'include the retention of the main hospital function, together with new commercial and workspace buildings with potential for laboratory facilities or other light manufacturing uses, which are designed to support the commercialisation of research in life sciences and health care sectors'. As part of this mix it states that it would be appropriate for education elements that support the hospital to be included. Ancillary retail and leisure uses would be supported and residential uses with links to the hospital are envisaged for the south of the site (see land use figure overleaf).</p> <p>The Framework states that new commercial floorspace could create 1,500-3,000 new jobs, focused south of the hospital, in the centre of masterplan area.</p> <p>The Framework also discusses the wider opportunities, including opportunities for the site to the south (now the Medipark allocation) which currently comprises the Jurassic Car Park for hospital staff. However,</p>

Document	Comments
	these have now been superseded in the Places for Everyone document and its strategic direction.

Source: BE Group commentary on above documents

Spatial Overview

- 12.3 The following figures illustrate the Wythenshawe Hospital's current landholding, its position within the surrounding landscape and, from the Strategic Regeneration Framework, the proposed land use zones within the future campus.

Figure 26 – Wythenshawe Hospital Strategic Framework Area



Source: LandInsight, 2024

Figure 27 – Wythenshawe Hospital Strategic Framework Area in Surrounding Area



Source: LandInsight and Google, 2024

- 12.4 The Strategic Framework Area is larger than the existing Hospital area, also picking up the Jurassic Car Park to the south, which is used for staff parking. The Strategic Framework Area does not include the Medipark site to the south of the Jurassic Car Park.

Figure 28 – Wythenshawe Hospital Strategic Framework Area and Current Uses



Source: Wythenshawe Hospital Strategic Framework Area

Figure 29 –Proposed Land Use and Future Development Zones



Source: Wythenshawe Hospital Strategic Framework Area

12.5 The Medipark site (green boundary) is illustrated below, in relation to the Strategic Framework Area (red boundary). The Timperley Wedge allocation is to the south of the Medipark site and is in Trafford Borough.

Figure 30 – Medipark Site



Source: LandInsight, using boundary identified in Places for Everyone, 2024

Development Potential

- 12.6 The considerations of the development potential for employment uses below focus on the E(g)/B2/B8 office, manufacturing and warehouse opportunities for the Strategic Framework Area and the Medipark site. This is in the wider context of Manchester's economy. However, the details of the planning and delivery of the Strategic Framework Area and the Medipark site would be led through the masterplanning work undertaken elsewhere.
- 12.7 As identified in the Strategic Regeneration Framework, the **Commercial** area will be focused on the centre of the site, south of the redeveloped Hospital area (approximately 8.5 ha). This will mean that commercial uses will be separated from the bulk of the Roundthorn Industrial Estate, which is north of the Hospital. The separation of these areas provides an opportunity to serve different markets to the existing Roundthorn Industrial Estate. This new area would provide a point of difference for the

commercial uses within the Hospital campus (compared to Roundthorn), strongly focused on health and wellbeing sector. By separating the commercial area from Roundthorn Industrial Estate, there is an opportunity to provide a substantially different level of product in terms of quality, function and ultimately price point. While floorspace yield would be finalised once further planning is undertaken, the 8.5 ha could yield some 51,000 sqm, assuming a moderately dense development outcome of 6,000 sqm/ha.

- 12.8 Development principles are outlined in the Strategic Regeneration Framework to guide development of the full area. This highlights how the Commercial area provides opportunities for workspaces, laboratories and light manufacturing to support the commercialisation of research in life sciences and health care. Ancillary retail and leisure would also form part of the mix of commercial uses.
- 12.9 The life science research sector would have an expectation of very high-quality facilities and amenities within the Commercial area. This represents a significant step change from the surrounding Roundthorn Industrial Estate, which is comprised of a mix of mid-quality and budget premises. This supports the development principle to provide some delineation between the existing industrial estate and the Commercial area within the Hospital campus.
- 12.10 The **Medipark** site (approximately 20.2 ha) provides an opportunity for longer-term growth of the campus and in particular the broader commercialisation of the sector as a cluster around the Hospital. Furthermore, there would be the opportunity for larger format commercial uses (e.g. specialised manufacturing, laboratories, storage) as well as allied uses and those facilities that do not need immediate proximity to the Hospital. The proposed 86,000 sqm of E(g) space would not be limited to E(g)(i) office space, but also include a substantial element of laboratory and light, specialised manufacturing spaces.
- 12.11 Timing of the delivery of this area is dependent on the momentum and timing of the masterplan area to the north. The Medipark site would not come forward in isolation, without the redevelopment of the Strategic Regeneration Framework area and the supporting delivery of the transport infrastructure proposed.
- 12.12 Ensuring that the commercial areas within the Strategic Regeneration Framework area and Medipark sites are highly attractive to the life science sector workforce is critical for its success. This requires excellent transport options to access the sites, high

quality residential areas nearby (including new build options at nearby Timperley site) and a range of on-site services and amenities that appeal to the professional workforce. Workspaces should be Grade A spaces, comparable in standard to premium city centre spaces.

- 12.13 Council's Employment Land Supply database identifies the potential for some 60,000 sqm of office space and 127 sqm of industrial space within this area. However, with the further planning through the Strategic Regeneration Framework for the Commercial and Medipark sites, it is considered that that this area could support some 137,000 sqm of office space, comprising 51,000 sqm in the Commercial area and 86,000 sqm at Medipark.

13.0 ROUNDTHORN ECONOMIC IMPROVEMENT AREA

Relevant Planning Documents

- 13.1 Roundthorn Economic Improvement Area is an established node for employment in the south of Manchester. The below summarises the relevant planning documents for Roundthorn.

Table 29 – Policies and Documents – Roundthorn Economic Improvement Area

Document	Comments
Places for Everyone Joint Development Plan	<p>Roundthorn is located in the Places for Everyone spatial strategy area sustaining southern competitiveness.</p> <p>Medipark to the south of Roundthorn and Wythenshawe Hospital is identified as a key medical cluster south of Wythenshawe Hospital (reviewed in Chapter 12.0). This includes a range of proposed transport improvements to help deliver Medipark, which will benefit the wider Roundthorn Industrial Estate.</p>
Manchester Core Strategy 2012 to 2027	<p>The Core Strategy identifies Roundthorn Industrial Estate as part of the wider West Wythenshawe Development Corridor, which also encompasses Oaks Business Park. Policy EC10 states that the existing role of Roundthorn Industrial Estate will be supported, including the existing industrial and manufacturing roles.</p> <p>Paragraph 8.82 as part of Policy EC10 states that the 'employment provision in Roundthorn and Sharston Industrial Estates is, in places, not considered entirely suitable for modern users. Across the Wythenshawe employment areas there is a need to provide a portfolio of sites and premises to meet the needs of inward investors and indigenous businesses. As well as this, the area has a below average rate of self employment. It is important to improve the SME base as it provides significant employment for local people. This can be improved by encouraging development of micro and small businesses and identifying sites and premises for micro and small businesses in district centres and neighbourhood centres. Also improved digital infrastructure can assist businesses secure new customers.'</p> <p>Therefore, there should be a consideration of potential refurbishments and regeneration of Roundthorn Industrial Estate where possible.</p> <p>Policy EC10 looks to support the connections between the key economic drivers in and around Wythenshawe. The policy states that 'development and infrastructure provision will be supported which strengthens transport connections between Roundthorn Industrial Estate, University Hospital South Manchester, Airport City and Manchester Airport. The Council will seek to maximise the opportunities to enhance this spatial cluster of key employment uses.'</p>
Unitary Development Plan	<p>Economic Improvement Area within the UDP. Retained policies in WW2 state that Council will permit new industrial and commercial activities in Roundthorn Industrial Estate, except where serious harm to the amenity of nearby residents or adjoining businesses would result.</p>

Source: BE Group commentary on above documents

Spatial Overview

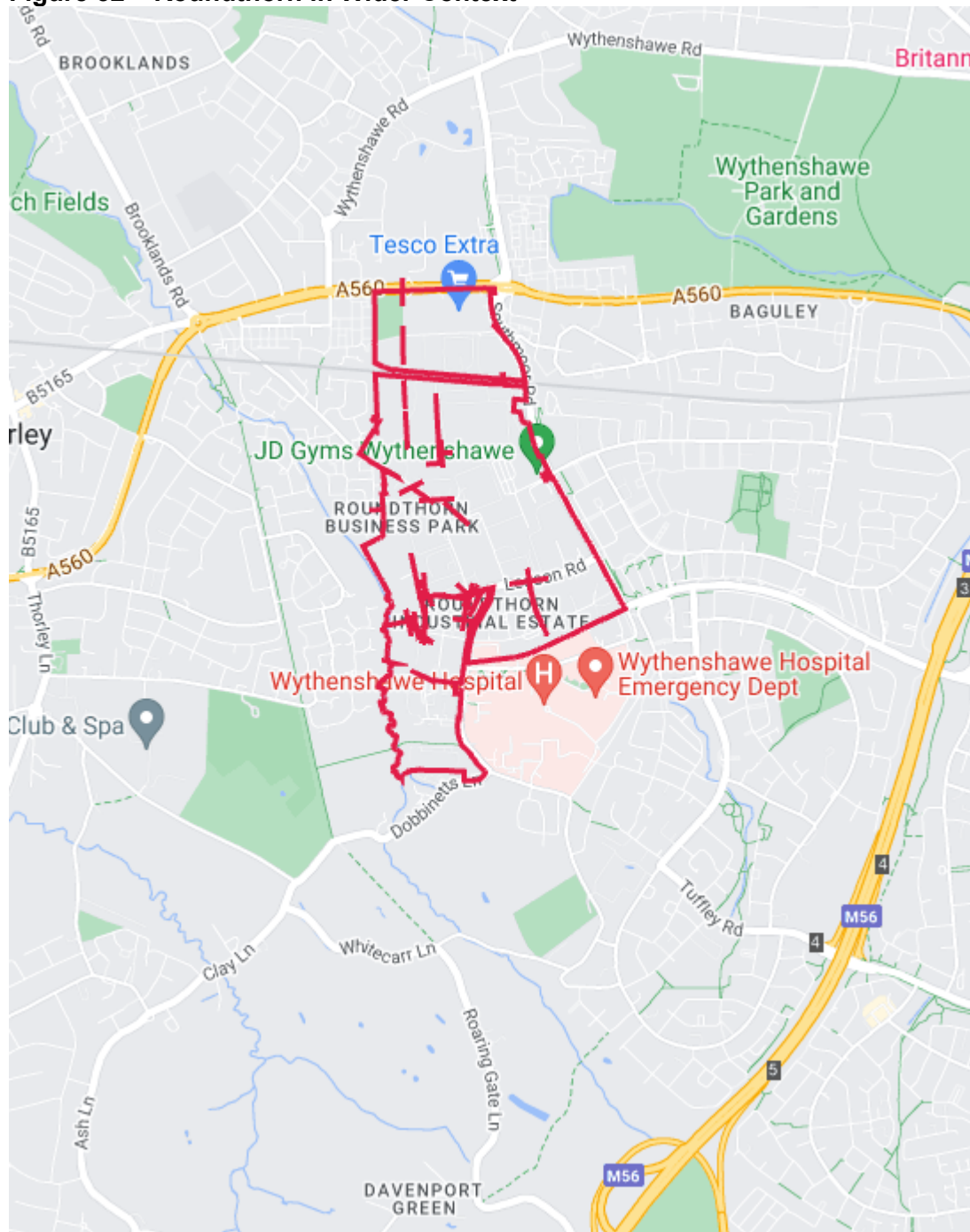
- 13.2 The following provides an illustration of the Roundthorn Economic Improvement Area boundary and its position in the wider area.

Figure 31 – Roundthorn Economic Improvement Area



Source: LandInsight, based on UDP boundaries, 2024

Figure 32 – Roundthorn in Wider Context



Source: LandInsight and Google Maps, based on UDP boundaries, 2024

- 13.3 Roundthorn Industrial Estate is a large employment area south of the A560 serving the south of Manchester. Connectivity to the motorway network (M56) is via the A560, which means accessibility to the strategic road network is generally better in the north of the estate than further south. The eastern boundary of the estate is Southmoor Road, which provides the main entry points to Roundthorn Industrial Estate and

includes two Metrolink stops (Baguley and Roundthorn), as well as bus routes. Bus stops are located on Ledson and Floats Roads within the estate.

- 13.4 The Economic Improvement Area designation covers some 73 ha (gross area), which has been fully developed out. Most of the designated area has been developed for a mix of industrial, warehousing and office units, though there are two supermarkets (Tesco, Lidl) within the allocation in the north (Baguley District Centre). While in one contiguous area, the large scale of the allocation and the road layout means that it does not operate as an integrated entity and navigation through the site can be difficult. There are some areas with significant on-street parking, which adds to perception of congestion. Office and industrial uses are intermingled throughout the estate, though there is a higher concentration of office space in the south-west of the area.
- 13.5 There is not a clear cluster or specialisation of businesses within the area, with a substantial array of operators, including logistics, MOT services, food manufacturing, general manufacturing, med-tech and storage. Some office space appears to be occupied by businesses complementary to the medical sector, wanting to be near Wythenshawe Hospital.
- 13.6 The building qualities within the area vary significantly. There is a small amount of derelict space fronting Southmoor Road, though most space throughout the estate appears useable and occupied. Older industrial units have lower ceiling heights and may be more difficult to re-tenant if brought to the market. However, there are some more modern industrial and warehousing units within the estate, more suitable to current occupier requirements. Office stock is generally of a moderate to good quality. Some refurbishment and redevelopment of older industrial and office stock has occurred.
- 13.7 Wythenshawe Hospital is immediately to the south of the Economic Improvement Area and with Roundthorn forms a broader node of employment uses and services in this area. To the south of the Hospital is the medipark allocation. The Hospital and Medipark allocation have been considered in Chapter 9.0. This has implications for Roundthorn Industrial Estate for its attractiveness as an employment destination and opportunities to catalyse redevelopment of older stock in the estate. Furthermore, a range of transport improvements have been listed in Places for Everyone to help deliver Medipark, which has the potential to benefit the wider Roundthorn Industrial Estate. The vision for the hospital campus in the Strategic Regeneration Framework is

for a substantially broader mix of uses on campus and for world-class facilities, which provides opportunities for Roundthorn to attract complementary businesses and those looking for satellite locations to the core campus node.

Employment Land

- 13.8 The gross land area of the Roundthorn Industrial Estate comprises some 73 ha, the significant majority of which is in Council ownership. The following table provides a list of use classes recorded within the boundary.

Table 30 – Roundthorn Economic Improvement Area Use Classes


Description	Use Class	Number of Properties
Warehouse/Storage	B8	98
Factory/Manufacturing/Light Industrial	B2/E(g)(iii)	48
Office	E(g)(i)	81
Retail	E(a,b)	9
Fast Food Outlet/Takeaway	Sui generis	1



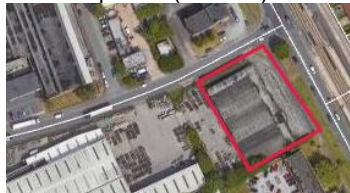
Sources: Nimbus using Ordnance Survey data, 2024



* excluding non-classified and ancillary uses (e.g. bus shelters, electricity sub-station, etc.)



- 13.9 This table shows that the predominant use class is B8 warehousing (41 percent), with office (34 percent) and manufacturing (20 percent) also having significant contributions to the overall mix.
- 13.10 The following provides an analysis of subareas within Roundthorn Industrial Estate, including identifying areas for potential redevelopment and significant planning applications and permissions.


Table 31 – Employment Land Assessment, Roundthorn Economic Improvement Area


Site Name/ Address	Baseline Employment Land (ha)	Description	Constraints	Planning Applications/ Permissions	Development Opportunities	Realistic Employment Land Supply, ha	Recommendations
Land Lying to The West of Claverton Road and Land and Buildings at Claverton Road and Floats Road, Roundthorn Industrial Estate	7.4	<p>Land is in MCC ownership, with 13 recorded leaseholdings. Good quality units throughout this area, including hybrid office/industrial units and more typical industrial/warehousing units. Timpson occupies several units within this area along Claverton Road. Car parking is generally off-street and appears to be sufficient. The site is west of the Hospital and has the potential to provide complementary uses and currently provides a car park that serves hospital users.</p> 	Nil	Nil	Unlikely to change functions within the planning period. Units are generally of a good quality and not in need of refurbishment in the near term.	0	Retain as employment use
Units 1-4 Caldey Road; Unit 7 Caldey Road; Unit E Ennis Close Roundthorn Industrial Estate	6.7	Three landholdings along Caldey Road, in the west of the estate in ownerships of Sunflower Industrial Property and Caldey Estate. Moderate to good quality industrial/warehousing units with low to mid ceiling heights. Generally off-street parking.	Nil	Nil	Unlikely to change functions within the planning period. Units are generally of a moderate to good quality and not in need of refurbishment in the near term.	0	Retain as employment use

Site Name/ Address	Baseline Employment Land (ha)	Description	Constraints	Planning Applications/ Permissions	Development Opportunities	Realistic Employment Land Supply, ha	Recommendations
							
Land and Buildings at Catford Road and Tilson Road; Land and Buildings on the North and South Sides of Tilson Road and the South Side of Ledson Road Roundthorn Industrial Estate	9.4	<p>Two large landholdings in the centre of the industrial estate, both in MCC ownership, with 50 individual properties and 32 leaseholders. Significant mix of uses along Tilson Road, with units of a basic to moderate quality. Units are a mix of low ceiling industrial units, hybrid industrial/office units and two storey office units. Tilson Road not directly connecting to Southmoor Road limits perceptions of access.</p> 	Nil	Nil	<p>There is the potential for refurbishment and redevelopment of some older stock in this area, particularly in eastern areas of site, with replacement with modern industrial and office units as appropriate, though this is likely to be over many years on a property-by-property basis. Not suitable for other uses.</p> <p>Derelict building fronting Southmoor Road more immediately available for redevelopment (0.25 ha).</p> 	0.25	Retain as employment use. Support refurbishments and redevelopments of older stock as appropriate for new E(g)/B2/B8 uses.

Site Name/ Address	Baseline Employment Land (ha)	Description	Constraints	Planning Applications/ Permissions	Development Opportunities	Realistic Employment Land Supply, ha	Recommendations
Industrial Units on the South West Side of Southmoor Road the North West Side of Ledson Road and the North East Side of Dallimore Road Roundthorn Industrial Estate	12.1	<p>Large landholding in MCC ownership with 40 individual properties and 26 leaseholders. Some of the estate's larger occupiers are in this area, including NG Transport and Manplas Ltd. Ledson Road, the southern border of this area is a busy spine road for the full estate. Mix of quality of units from basic to good and mix of office and industrial buildings interspersed throughout the area. Some larger office buildings in this area, including dated looking buildings in need of refurbishment.</p> 	On-street parking	Nil	<p>Potential for some refurbishment and redevelopment of older stock, particularly at Dallimore Road/Ledson Road, though this remains in use and likely to be longer term.</p> 	0.75	Retain as employment use. Support refurbishments and redevelopments of older stock as appropriate for new E(g)/B2/B8 uses.
Industrial Units on the South West and North East Sides of Floats Road, on the South West Side of Dallimore Road, on the North West Side of Ledson Road and Land Lying to	16.6	<p>Several sites along Floats Road in the west of the estate in MCC, Trafford BC and private sector ownerships with 17 leaseholders. Access to this part of the estate is through the remainder of the site to the east, which limits perceptions of convenience. Mix of industrial and office buildings, from basic to high quality. On-street parking along Floats Road though most sites have off-street parking.</p>	On-street parking	Nil	<p>Generally, units are in reasonable condition, though potential for some redevelopment along western side of Dallimore Road, though currently still in use.</p>	0.54	Retain as employment use. Support refurbishments and redevelopments of older stock as appropriate for new E(g)/B2/B8 uses.

Site Name/ Address	Baseline Employment Land (ha)	Description	Constraints	Planning Applications/ Permissions	Development Opportunities	Realistic Employment Land Supply, ha	Recommendations
the South West of Floats Road, Roundthorn Industrial Estate							
Unit A9, Southmoor Industrial Estate, Southmoor Road	9.9	Large area comprising two individual landholdings, in private ownerships. Eastern site comprises Southmoor Industrial Park, which includes logistics space and two standalone office buildings and is in a key location in the wider estate. The logistics space has higher ceilings than most of the remainder of the estate. The western site is a single occupier logistics unit (DSV Road Ltd), and this site is accessed via Floats Road and thus has significantly less prominence than the eastern site.	Nil	Part of the western parcel has approval for change of use to a climbing centre of 4,725 sqm GIA (137902/FO/2023)	Unlikely to see redevelopment of buildings in this location.	0	Retain for employment uses. Climbing centre approval will remove floorspace for B2/B8 uses, though still appropriate for warehousing space.

Site Name/ Address	Baseline Employment Land (ha)	Description	Constraints	Planning Applications/ Permissions	Development Opportunities	Realistic Employment Land Supply, ha	Recommendations
							
Land and Buildings on the South Side of Altrincham Road, Shepherd House and Southmoor House, Southmoor Road and Land and Buildings on the South Side of Timpson Road	11.3	Area within the Economic Improvement Area that is functionally and physically separate from the remaining industrial estate. Majority of site is within MCC ownership, with one private owner. Uses comprise industrial, retailing and sporting fields and is separated from the industrial uses by the rail corridor to the south of this area. The northern part of this site, fronting Altrincham Road (A560) comprises two supermarkets (Tesco, Lidl) forming part of the Baguley District Centre. The western portion of the site comprises the sporting fields. The area south of Timpson Road comprises three moderate quality industrial/ storage units.	Nil	Nil	Unlikely to see redevelopment of buildings in this location.	0	Remove retail (Baguley District Centre) and sporting field areas from the Economic Improvement Area allocation. Retain remaining areas for employment.

Site Name/ Address	Baseline Employment Land (ha)	Description	Constraints	Planning Applications/ Permissions	Development Opportunities	Realistic Employment Land Supply, ha	Recommendations
							

Sources: LandInsight, MCC, commercial agent websites, BE Group analysis.

Development Potential

- 13.11 The Roundthorn Economic Improvement Area (Roundthorn Industrial Estate) is an established and important employment node in the south of the City. It provides a broad array of employment uses and appears to have good occupation levels in the industrial/warehousing units.
- 13.12 The area is largely fully built out with no significant unimproved development parcels. Furthermore, most of the existing built stock is of a sufficient quality to support employment uses in the foreseeable future. However, some stock is dated and would benefit from refurbishments or other improvements, and this should be supported to ensure that Roundthorn remains an attractive area for businesses.
- 13.13 Small areas are more likely to need a more substantial redevelopment within the planning horizon. A derelict site (0.25 ha) at the intersection of Southmoor and Ledson Roads is in a high-profile location and should be redeveloped for modern employment uses. Consideration could be given to this forming stage one of a broader redevelopment, including adjacent older office buildings, though this would not be essential at this stage. A further opportunity for redevelopment would be the older units at Dallimore Road, which have some occupancy. This is likely to be a longer-term opportunity. The land for both of these areas is in the ownership of Manchester City Council. Any uses for the redeveloped sites should be for office or industrial employment uses.
- 13.14 The land areas for potential redevelopment within Roundthorn Economic Improvement Area is summarised below, along with potential floorspace yields of those sites, assumed to be developed at typical industrial estate density (4,000 sqm/ha).

Table 32 – Summary of Development Areas: Roundthorn Economic Improvement Area

Location	Area (ha)	Potential Floorspace (sqm)
Greenfield/Cleared Sites	0	
- nil		
Derelict Brownfield Sites		
- Southmoor/Ledson Rds	0.25	1,000
Occupied Sites		
- Dallimore/Ledson Rds	0.75	3,000
- South-west of Dallimore Rd	0.54	2,200
Total Area	1.54	6,200

Source: BE Group analysis of sites

13.15 Broader development opportunities could arise through the redevelopment of Wythenshawe Hospital. While the focus of medical aligned research, manufacturing and office space will be within the masterplan area, there are likely to be opportunities to support further facilities within the surrounding Roundthorn area. This is likely to require extensive refurbishment or redevelopment of existing units to high-quality specifications, which would be a requirement of this sector. It is likely that the lack of high-quality premises is limiting the attractiveness of Roundthorn for allied occupiers that would prefer a unit near to the Hospital.

14.0 SHARSTON ECONOMIC IMPROVEMENT AREA

Relevant Policy Documents

- 14.1 Sharston Economic Improvement Area is a well-established employment node within Manchester with planning support over several decades. The below summarises the relevant planning documents for Sharston.

Table 33 – Policies and Documents – Sharston Economic Improvement Area

Document	Comments
Places for Everyone Joint Development Plan	Policy JP Strat 9: Southern Areas covers the area in which Sharston sits. This policy looks to protect and enhance the economic competitiveness, distinctive local neighbourhood character and environmental attractiveness of the area. There will be a strong emphasis on making use of suitable brownfield land.
Unitary Development Plan	Economic Improvement Area within the UDP. Retained policies in EW12 state that Council will protect the role of Sharston Industrial Estate 'as a centre for industrial activity and employment which is convenient and accessible to Wythenshawe people in particular.' The policy states that there is scope for new B1 business (now E(g)) development, though the emphasis should remain on general industry and distribution.
Manchester Core Strategy 2012 to 2027	<p>The Core Strategy identifies Sharston Industrial Estate as part of the wider East Wythenshawe Development Corridor, which also encompasses Atlas Business Park, Concord Business Park and Ringway Trading Estate, which are all to the south. Policy EC10 states that the existing role of Sharston will be supported, including the existing industrial and manufacturing roles.</p> <p>Paragraph 8.82 as part of Policy EC10 states that the 'employment provision in Roundthorn and Sharston Industrial Estates is, in places, not considered entirely suitable for modern users. Across the Wythenshawe employment areas there is a need to provide a portfolio of sites and premises to meet the needs of inward investors and indigenous businesses. As well as this, the area has a below average rate of self employment. It is important to improve the SME base as it provides significant employment for local people. This can be improved by encouraging development of micro and small businesses and identifying sites and premises for micro and small businesses in district centres and neighbourhood centres. Also improved digital infrastructure can assist businesses secure new customers.'</p> <p>Therefore, there should be a consideration of potential refurbishments and regeneration of Sharston Industrial Estate where possible.</p>

Source: BE Group review of above documents

- 14.2 The key element of policy for the Sharston Industrial Estate is that it is a long-established employment area and is to be supported in continuing this function.

Spatial Overview

- 14.3 The following illustrates the Sharston Economic Improvement Area boundary.

Figure 33 – Sharston Economic Improvement Area



Source: LandInsight, based on UDP boundaries, 2024

Figure 34 – Sharston Economic Improvement Area in Wider Context



Source: LandInsight and Google, based on UDP boundaries, 2024

- 14.4 Sharston Industrial Estate is a well-established industrial node serving the south of Manchester. It benefits from access to the strategic road network, including a junction with the M56 immediately adjacent to the industrial estate. An east-west rail line runs through the site, though there is no nearby station or a freight terminal.
- 14.5 Comprising about 44 ha (gross), the Sharston Industrial Estate is a significant node for industrial uses in the south of Manchester. The estate comprises a mix of new and old industrial units, including multi-let buildings with smaller units and larger, single occupier units. Larger occupiers include Siemens, Cardinal Global Logistics, Yusan Logistics, Vita Liquid Polymers, Stagecoach and APH, representative of this area's mix of logistics, storage/parking and manufacturing.
- 14.6 The City Council has freehold ownership of over 96 percent of the land area within Sharston Industrial Estate, with only pockets in private sector ownership. This has allowed Council to drive development and regeneration of the estate. Units are available on a leasehold basis.
- 14.7 There has been refurbishments and redevelopments of older units to new buildings throughout the estate. There are further opportunities for demolition and redevelopment of older stock, including around Paston Road, south of Leestone Road and south of Longley Lane. Long-term occupiers, such as Siemens, should also be encouraged to refurbish/update their premises as appropriate.
- 14.8 Outside of the Sharston Industrial Estate and Sharston Economic Improvement Area boundary are further employment areas, including Council's Longley Lane Depot and waste recycling centre to the east and Sharston Green Business Park, another Council-owned estate to the south of the M56, comprising good quality units, with occupiers including Hellerman Tyton, Airline Services and Authentic Food.
- 14.9 Currently marketed premises include several units at Enterprise Point office building (in the south-west of the site) and South Court Business Centre as an investment sale, though only a very limited number of marketed industrial or warehousing premises, despite the estate being overwhelmingly an industrial and warehousing node, rather than an office area.

Employment Land

14.10 The gross land area of the Sharston Industrial Estate comprises some 44 ha, the vast majority of which is in Council ownership.

14.11 The following table summarises the use classes of buildings within Sharston Industrial Estate.

Table 34 – Sharston Economic Improvement Area Use Classes



Description	Use Class	Number of Properties
Warehouse/Storage	B8	56
Factory/Manufacturing/Light Industrial	B2/E(g)(iii)	52
Office	E(g)(i)	50
Retail	E(a,b)	5
Fast Food Outlet/Takeaway	Sui generis	1
Indoor/Outdoor Leisure/Sporting Activity	F2	1



Sources: Nimbus using Ordnance Survey data, 2024


* excluding non-classified and ancillary uses (e.g. bus shelters, electricity sub-station, etc.)


14.12 The following provides an analysis of the subareas within the Sharston Industrial Estate, including identifying areas for potential redevelopment.

Table 35 – Employment Land Assessment, Sharston Economic Improvement Area

Site Name/ Address	Baseline Employment Land (ha)	Description	Constraints	Planning Applications/ Permissions	Development Opportunities	Realistic Employment Land Supply, ha	Recommendations
Land and Buildings on the North and South Sides of Leestone Road and Shentonfield Road, Sharston	12.7	<p>Large area between the M56 to the south and the rail corridor to the north. Other than one plot in ownership of North West Ambulance Service, the land is in single ownership of MCC. Units are a mix of older units with low ceilings, modern warehouses and mid-sized premises with a variety of leaseholders.</p> <p>This area benefits from close proximity to the junction with the M56.</p> 	On-street parking, especially Shentonfield Road	No recent significant permissions or applications for redevelopments.	<p>Potential redevelopment and/or refurbishment of older units, though most of these units still have a good level of occupancy. Potential focus areas for redevelopment are illustrated below, though would be dependent on occupiers.</p> 	<p>0</p> <p>Though some 2.4 ha of land currently with older units could be redeveloped over time. Uses would still be for employment and thus net change would be 0.</p>	<p>Continue to pursue demolition and redevelopment of older units as appropriate.</p> <p>Site immediately adjacent to junction has opportunity to be a high-quality employment occupier and represents a higher value site for redevelopment.</p>
Land And Buildings on The North West Side of Sharston Road And The North East Side of Altrincham Road	4.2	<p>Site in the south-western corner of the broader estate, this area is functionally different to the remainder of estate, with some retailing (Aldi, Post Office), the South Court Business Centre (operated by Ivy Group) and some warehousing and trade supply units. The South Court Business Centre is currently being marketed as an investment sale</p>	One-way access along service road.	No recent significant permissions or applications for redevelopments.	Potential refurbishment of older stock (e.g. Post Office/Royal Mail building), though not a priority area.	0	Support current uses.

Site Name/ Address	Baseline Employment Land (ha)	Description	Constraints	Planning Applications/ Permissions	Development Opportunities	Realistic Employment Land Supply, ha	Recommendations
							
North And South Sides of Harper Road	7.0	<p>Single ownership land (MCC) to the north of the rail corridor with multiple buildings and leaseholders. Buildings are of a wide variety of ages and qualities. Largest occupier is Siemens, which has a large site in the north of this area.</p> 	On-street parking	No recent significant permissions or applications for redevelopments.	Potential for some redevelopment of older stock, though not as considerable as other areas. From exterior, Siemens buildings are dated and in need of refurbishment/ renewal, though would need to work with Siemens in order to retain their presence in the area.	0	Support current uses. Work with Siemens and occupiers of other older buildings to identify opportunities for renewal.

Site Name/ Address	Baseline Employment Land (ha)	Description	Constraints	Planning Applications/ Permissions	Development Opportunities	Realistic Employment Land Supply, ha	Recommendations
North East Side of Bradnor Road, Land and Buildings on the North West Side of Harling Road, Land And Buildings on the North West Side of Sharston Road and Land and Buildings on the South West Side of Longley Lane	9.0	<p>Land in majority ownership of MCC, though two central parcels are in private ownership (Promao Ltd, Airport Parking & Hotels Ltd). Multiple leaseholders throughout this area. Northern part of the site, fronting Longley Lane generally comprises older, smaller units, including some in need of renewal. Leltex House in the north has had recladding/refurbishments works. The northern side of Longley Lane is residential and thus units in this area would need to be sensitive to residential uses. Further south there are units/sites for airport parking and logistics uses.</p> 	Some on-street parking though not a significant hindrance.		Older buildings along Longley Lane could see refurbishments or redevelopment. Uses should remain for employment purposes, though should be low impact given nearby residential uses.	0 Though some 1.8 ha of land currently with older units could be redeveloped over time. Uses would still be for employment and thus net change would be 0.	Continue to pursue demolition and redevelopment of older units as appropriate. Sites in the north of the site should remain for employment uses, but be of a scale that is sensitive to nearby residential dwellings,
Land and Buildings at Paston Road and Bradnor Road	10.6	This land is fully in MCC ownership. Paston Road forms the north-south spine of this area, which is one of the quieter parts of the full industrial estate, with lower occupancy levels. Buildings/sites along Paston Road appear to be ripe for redevelopment. Residential areas are to the west, but separated and shielded by a treeline. The eastern part of this area has seen some renewal with newer industrial units being developed and occupied.	None		Significant redevelopment opportunity, given the size of the individual land parcels and low occupancy levels. Its low profile within the broader industrial estate may limit its market appeal, though new units in this location would still be attractive, given its broader locational characteristics. Opportunity for mid to larger B2/B8 units.	0 Though some 8.7 ha of land currently with older units and low occupancy could be redeveloped over time. Uses would still be for	Focus area for renewal and redevelopment, including further demolitions.

Site Name/ Address	Baseline Employment Land (ha)	Description	Constraints	Planning Applications/ Permissions	Development Opportunities	Realistic Employment Land Supply, ha	Recommendations
						employment and thus net change would be 0.	

Sources: LandInsight, MCC, commercial agent websites, BE Group analysis.

Development Potential

- 14.13 The Sharston Economic Improvement Area (Sharston Industrial Estate) is a key employment node in the south of Manchester. It has several longstanding occupiers (e.g. Siemens), which indicate it is a good location from which to operate a business. Overall, occupancy appears to be high, particularly for the refurbished or more modern premises. Even older stock appears to be reasonably well occupied, suggesting that there is a significant demand for units in this location.
- 14.14 The development potential within Sharston Industrial Area is for the redevelopment of older stock for B2/B8 employment uses. As identified in the table above, there are several locations throughout the estate that could be regenerated, either through refurbishments or demolition and redevelopment. Focus areas should be in the west of the estate along Paston Road, the north of the estate along Longley Lane and in the south along Leestone Road and Shentonfield Road. Of these, the sites along Paston Road appear the most in need of redevelopment and provide an opportunity for mid to large B2/B8 units.
- 14.15 One key potential redevelopment site in the south is at the intersection of Leestone Road, Sharston Road and the M56 junction, currently occupied by Camperlands, which has had the leasehold for over 10 years. The quality of building is low, though still able to be utilised. This high-profile site is likely to be particularly attractive to the market if available, given its gateway location. In the medium to longer term, Council could look to redevelop this site for a high-quality employment building as a showcase for the estate. The uses of the building should still be E(g)/B2/B8.
- 14.16 It is not recommended that any of the employment land within this area is released for non-employment uses.
- 14.17 Overall, the potential development areas within Sharston Economic Improvement Area are estimated to comprise the following areas, along with potential floorspace yields of those sites, assumed to be developed at typical industrial estate density (4,000 sqm/ha).

Table 36 – Summary of Development Areas: Sharston Economic Improvement Area

Location	Area (ha)	Potential Floorspace (sqm)
Greenfield/Cleared Sites	0	
- nil		
Derelict Brownfield Sites		
- Paston Road	1.4	5,600
Currently Occupied/Useable Buildings		
- Paston Road	7.3	29,200
- Longley Lane	1.8	7,200
- Leestone Road/Shentonfield Road	2.4	9,600
Total Area	12.9	51,600

Source: BE Group analysis of sites

14.18 As can be seen in the table above, most of the site areas that potentially could be redeveloped, are currently occupied or at least still useable, providing basic accommodation for businesses. Therefore, the redevelopment of these areas could take a considerable time, with a need to decant current occupiers and find alternative arrangements for them. Therefore, while notionally there is some 12.9 ha of sites that could be regenerated, this will be a complex arrangement occurring over several years, which is how the regeneration of the estate has occurred previously. Furthermore, this land is a regeneration of existing employment uses and thus represents a net zero of employment land take-up.

15.0 UNITARY DEVELOPMENT PLAN EMPLOYMENT ALLOCATIONS

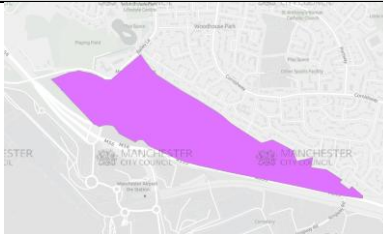
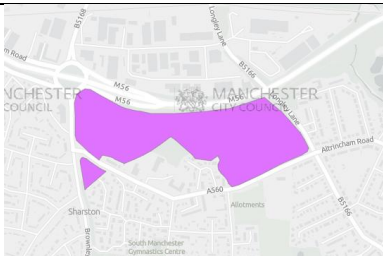
- 15.1 The following chapter reviews the employment allocations saved from the UDP. These are generally smaller sites than the employment nodes reviewed in the previous chapter, but provide important locations for a variety of businesses, from SMEs to large enterprises and thus form an important part of the Manchester economy.
- 15.2 These employment allocations have been reviewed at a lower level of detail than the strategic employment locations and economic improvement areas of the previous chapters. However, the review is sufficient for determining on-going appropriateness for employment uses on the sites or whether to consider for alternative uses.
- 15.3 The 43 sites provide some 149.47 ha of land, which is a mix of unused land, employment uses and non-employment uses (e.g. residential uses). The sites have been assessed for their potential to accommodate new employment development over the coming planning period.
- 15.4 The 149.47 ha of UDP employment allocations, includes the Airport City site which has been assessed separately. Excluding this site, there is a total of 114.54 ha. Of these sites, there is approximately 13.65 ha of land that could be developed/redeveloped for employment uses over the planning period, depending on areas retained, as listed below, with estimates of potential floorspace yields at densities of 4,000 sqm/ha.

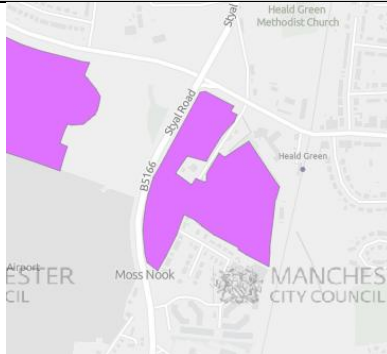
Table 37 – Summary of UDP Allocations with Development Areas

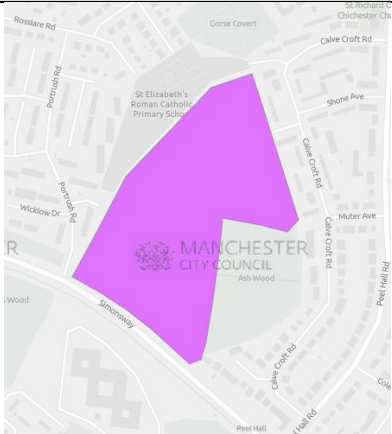
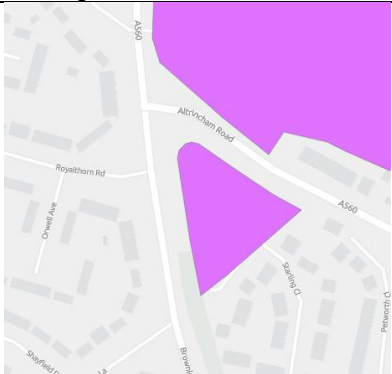
Location	Area (ha)	Potential Office Floorspace (sqm)	Potential Industrial Floorspace (sqm)
Land at Styal Road, Irvin Drive, Moss Nook	2.31	9240	
Ringway Trading Estate	5.14		20560
Siemens, Princess Road	1.67	6680	
Devonshire Street/Stockport Road	0.2		800
Part of the former Nicholls Ardwick School	1.39		5560
Former Ardwick Sports Centre	0.37		1480
Corner of Hyde Road/Higher Ardwick	0.12		480
Mancunian Way/Brydon Avenue/Higher Ardwick/Temperance Street (W)	0.47		1880
Land between Redgate Lane and Belle Vue Avenue	0.22	880	
Land fronting Hyde Road	0.49		1960
Bury New Road/Fairy Lane	0.65		2600
"CIS" Site at Rochdale Road and Miller Street	0.62	2480	
Total Area		19,280	35,320

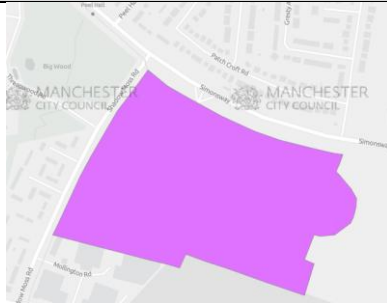

Source: BE Group analysis of sites

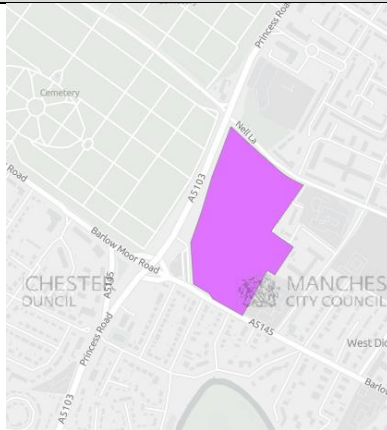
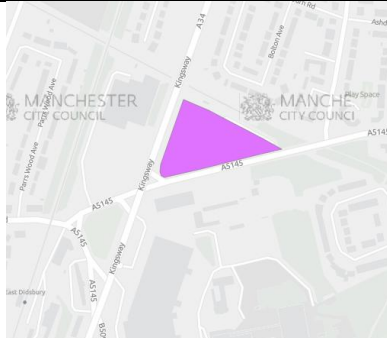
Table 38 – UDP Employment Allocations Assessment



Site Ref.	Site Name	UDP Area	Uses in UDP Policies	Description	Gross Area (ha)	Developable Area (ha)	Recommendations
EW8	Airport City North and Manchester Business Park	Wythenshawe	Strategic site for high technology industry	 <p>See Airport City chapter</p>	34.93	28.6 (25.65+2.94)	This is an attractive site that could accommodate a range of employment uses. See Airport City chapter
EW9a	Sharston Green, Sharston	Wythenshawe	B1 business development	 <p>This site has been fully built out with residential being built in the west and Sharston Green Business Park being delivered in the east. The business park comprises six business units with occupiers including Hellerman Tyton, Airline Services and Authentic Food.</p>	13.74	0	Deallocate the residential element of the site. With regards to Sharston Green Business Park, this is unlikely to see further employment redevelopment in the foreseeable future. Support ongoing employment use

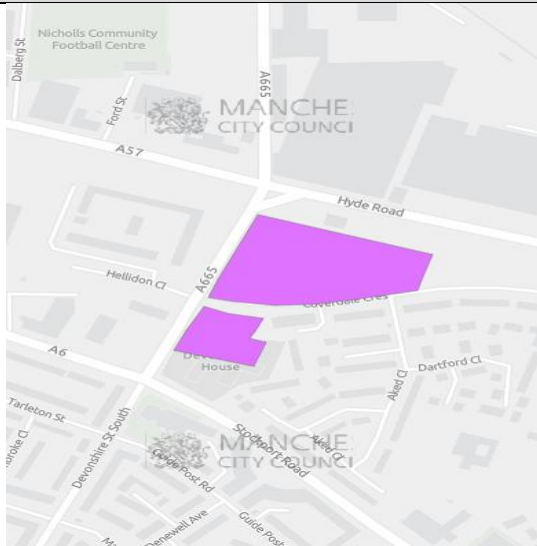
Site Ref.	Site Name	UDP Area	Uses in UDP Policies	Description	Gross Area (ha)	Developable Area (ha)	Recommendations
EW9b	land at Styal Road, Irvin Drive, Moss Nook	Wythenshawe	B1 business development	 <p>Located on the B5166, this has good access to the Manchester Airport Relief Road and in turn the M56. This site has been developed to provide Ashbrook Office Park which sits alongside a mixture of residential, leisure and an airport car park on the B5166 frontage. The Office Park consists of around seven two storey office buildings. At the back of the office park is a gym and a new build industrial development under construction comprising four warehouse units of 322-420 sqm (3,467 – 4,521 sqft).</p> <p>The remaining developable area is split across three parcels including the car park and adjoining grassland on the frontage and grassland opposite the pub/restaurant.</p>	6.63	2.31 1.85+0.46	The remaining developable land would suit a range of employment uses. Support ongoing employment use


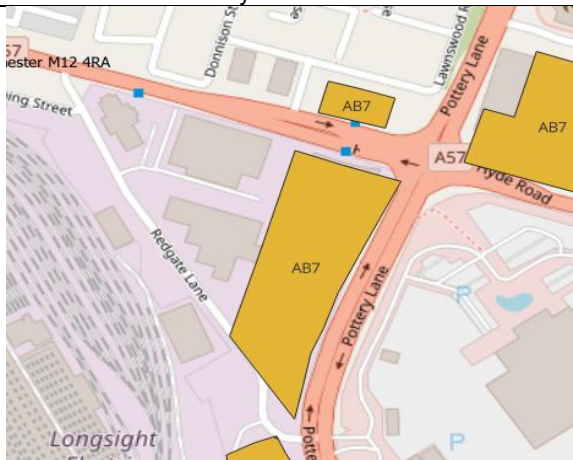
Site Ref.	Site Name	UDP Area	Uses in UDP Policies	Description	Gross Area (ha)	Developable Area (ha)	Recommendations
EW9c	Simonsway/Calve Croft Road, Woodhouse Park	Wythenshawe	B1 business development	 <p>This site has been fully built out to provide residential housing.</p>	5.95	0	Deallocate as the site no longer has an economic function
EW9d	Altrincham Road, Sharston	Wythenshawe	B1 business development	 <p>This site has been built out for medical uses operated by Manchester University NHS Foundation Trust.</p>	0.48	0	Deallocate as the site no longer has an economic function

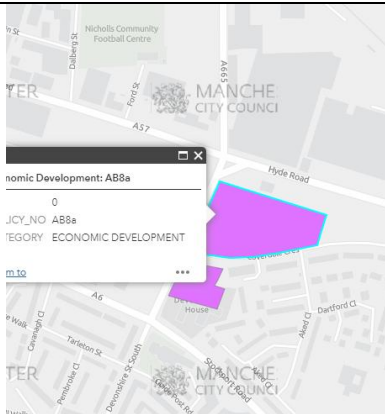

Site Ref.	Site Name	UDP Area	Uses in UDP Policies	Description	Gross Area (ha)	Developable Area (ha)	Recommendations
EW11	Ringway Trading Estate	Wythenshawe	B1 business uses, industrial, ancillary warehousing and/or hotel	 <p>Sitting on Simonsway with good access to the M56, Atlas Business Park has been delivered on this site. Four large office buildings are found on site with key occupiers including Bowmer + Kirkland and Mitie. One plot remains undeveloped at the end of the park while a large field remains undeveloped to the east of the park.</p>	11.51	5.14 4.09+1.05	This site could accommodate a range of employment uses. The size of the vacant area means it could potentially accommodate a significant employment development
DB12a	Towers 2000 Business Park, Wilmslow Road	South Manchester	Expansion or redevelopment of existing major employment sites	 <p>This site has been built out, providing several large office buildings of high quality occupied by the likes of British Airways and Cisco.</p>	7.45	0	This site is unlikely to be developed in the current planning horizon. Support ongoing employment use


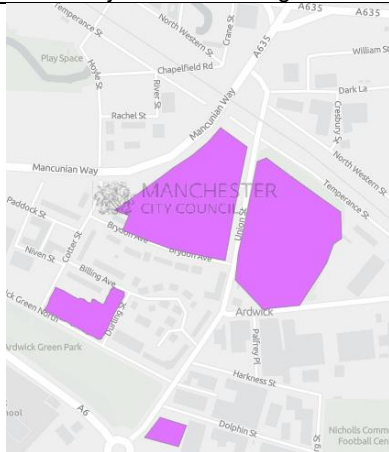
Site Ref.	Site Name	UDP Area	Uses in UDP Policies	Description	Gross Area (ha)	Developable Area (ha)	Recommendations
DB12b	Siemens, Princess Road	South Manchester	Expansion or redevelopment of existing major employment sites	 <p>This site is home to the UK head office of Siemens, who were the original occupier of the site. Recently, the site has become the Didsbury Technology Park which is a strategic partnership between Siemens, Bruntwood, PJ Livesey, Spire Healthcare and Manchester City Council. This has seen the 20,000 sqft (1,858 sqm) Ohm Building being developed alongside a new private hospital, the Spire Manchester. The remaining area (1.67 hectares) is subject to a permission (135309/FO/2022) which will see 10,409 sqm of office floorspace alongside a multi-storey car park.</p>	8.09	1.67	Support ongoing employment use and proceed with office permission.
DB13	Land at Parrswood Allotments, Parrswood Lane	South Manchester	B1 business development		1.15	0	Currently used as a park and ride facility – unlikely to change use in planning timeframe



Site Ref.	Site Name	UDP Area	Uses in UDP Policies	Description	Gross Area (ha)	Developable Area (ha)	Recommendations
				Located at the intersection of the A34 and the A5145, this site has good access to the M56. The site sits adjacent to the East Didsbury Metrolink station and is currently in use for a park and ride.			
LL7	Former Birchfields Bus Depot	South Manchester	B1 business, light industrial, residential, leisure and/or local shopping	 <p>Fallowfield Retail Park is found here however the site is undergoing substantial redevelopment with six retail units and a Burger King being recently demolished (138593/DEM/2023) with Lidl having plans to build a supermarket in their place. Three retail units remain in operation in the north of the site.</p>	1.6	0	Deallocate as this is currently in retail use and employment development is unlikely
RF6	Land at Moseley Road/Ladybarn Lane/Balmoral Street	South Manchester	Residential, B1 or mixed use incorporating a small amount of retail	 <p>This site has been fully developed out to provide residential and student accommodation.</p>	0.6	0	Deallocate as the site no longer has an economic function


Site Ref.	Site Name	UDP Area	Uses in UDP Policies	Description	Gross Area (ha)	Developable Area (ha)	Recommendations
AB5	Devonshire Street/Stockport Road	Central Manchester	Local supermarket and related commercial uses	 <p>Located just off the intersection of the A57 and the A665, this small site has been partially built out, providing a care facility named Devonshire House. The remaining developable area sits to the rear of the facility and currently contains grass and trees.</p>	0.35	0.2	The site benefits from a strong location with employment development nearby, however, the size of the site limits what is potentially deliverable.



Site Ref.	Site Name	UDP Area	Uses in UDP Policies	Description	Gross Area (ha)	Developable Area (ha)	Recommendations
AB7	Land at junction of the Intermediate Ring Road and Hyde Road (NW)	Central Manchester	Business/commercial development, hotel	 <p>This site has been fully built out for residential uses.</p>	0.19	0	Deallocate as the site no longer has an economic function
AB7	Land at junction of the Intermediate Ring Road and Hyde Road (SW)	Central Manchester	Business/commercial development, hotel, rail-related development		1.78	0	This site is unlikely to be redeveloped in the current planning horizon. Support ongoing employment use

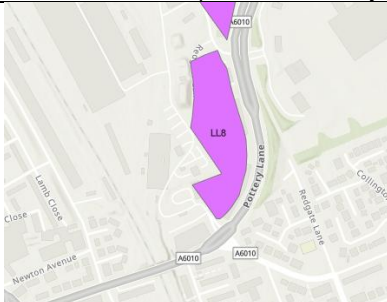

Site Ref.	Site Name	UDP Area	Uses in UDP Policies	Description	Gross Area (ha)	Developable Area (ha)	Recommendations
				This site has been developed providing a new commercial vehicle remarketing centre for the BCA			
AB8a	Part of the former Nicholls Ardwick School	Central Manchester	B1 Light industrial/office	 <p>Located at the intersection of the A57 and A665, this vacant site is found behind the Early Explorers Day Nursery. To the east of the nursery, the site is covered in well maintained grass while to the west there is overgrown shrubland and trees.</p>	1.39	1.39	The site has strong locational advantages and while currently green space, could accommodate a range of employment uses.
AB8b	Former Ardwick Sports Centre	Central Manchester	B1 Light industrial/office or leisure	 <p>Located on the A57 adjacent to the O2 Apollo concert hall, this site currently operates as a vehicle repairs / car sales facility. On the site is a vehicle repair workshop and a couple of temporary structures while the remainder is occupied by parked vehicles. The site gained planning permission</p>	0.37	0.37	The site has strong locational advantages and has a planning permission for storage uses.

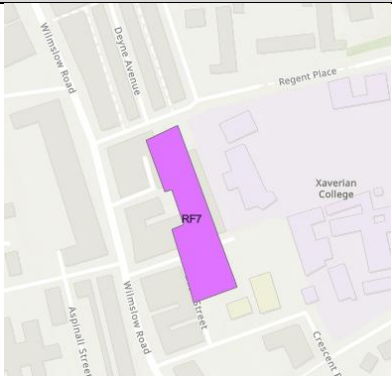

Site Ref.	Site Name	UDP Area	Uses in UDP Policies	Description	Gross Area (ha)	Developable Area (ha)	Recommendations
				(136978/FO/2023) in June 2023 for the erection of a 4-storey self-storage facility (B8 use).			
AB8d	Corner of Hyde Road/Higher Ardwick	Central Manchester	B1 Light industrial/office	 <p>This site is located on the A57, opposite the O2 Apollo concert hall. It currently operates as a car park for the adjacent self-storage and office facility.</p>	0.12	0.12	The site has strong locational advantages and could accommodate a range of employment uses. Potential developable area could extend beyond allocation area.
AB8e	Mancunian Way/Brydon Avenue/Higher Ardwick/Temperance Street (W)	Central Manchester	Commercial/industrial	 <p>This site has been built on to provide a secure distribution premises for Loomis and a large office building with multiple occupiers. The remaining vacant land is covered in grass and trees, lying to the</p>	1.64	0.47	This site would most likely support an office development given the access constraints.

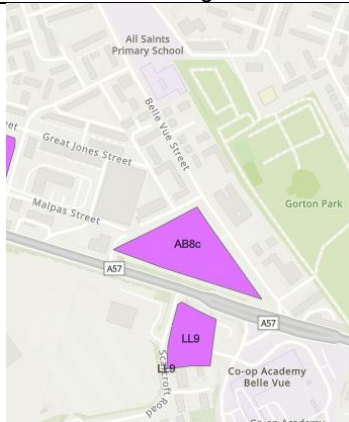

Site Ref.	Site Name	UDP Area	Uses in UDP Policies	Description	Gross Area (ha)	Developable Area (ha)	Recommendations
				rear of these facilities. Any development would need to share the access with the office premises since access via Brydon Avenue does not seem feasible given its width and the current residential uses.			
AB8e	Mancunian Way/Brydon Avenue/Higher Ardwick/Temperance Street (E)	Central Manchester	Commercial/industrial	 <p>This site is currently in use by Powerleague who operate a pavilion and car parking along with several artificial football pitches located to the rear.</p>	1.79	0	Deallocate as the site no longer has an economic function
AB8f	Land fronting Ardwick Green North	Central Manchester	B1 Light industrial/office	 <p>Two three storey apartment blocks have been erected on this site. The remaining vacant area is split into two parcels. The first parcel is a gravel covered plot located at the intersection of Durling</p>	0.37	0	Both of the remaining parcels would be most suited to residential uses, although alternatively could support office employment uses.


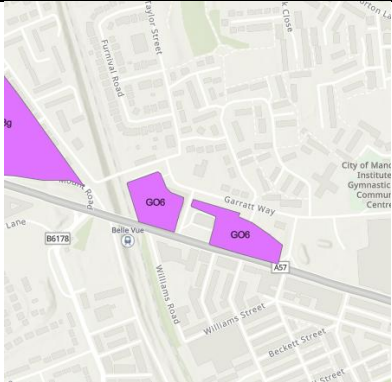
Site Ref.	Site Name	UDP Area	Uses in UDP Policies	Description	Gross Area (ha)	Developable Area (ha)	Recommendations
				<p>Street and Billing Avenue. This lies within the residential estate and currently accommodates parked cars.</p> <p>The remaining parcel is a vacant grass plot that sits on the frontage to Ardwick Green North. Across the road is a series of office buildings so this could potentially form an extension of the employment area, however, the outcome of application (135857/FO/2022), which involves the development of 16 three-storey townhouses, could result in this plot becoming surrounded by residential uses.</p>			
AB8h	Daisy Works	Central Manchester	Small scale workshops/offices/light industrial	 <p>This site is now part of the Dean Trust Ardwick school premises that was built in 2015.</p>	0.78	0	Deallocate as the site has been developed for non-employment uses

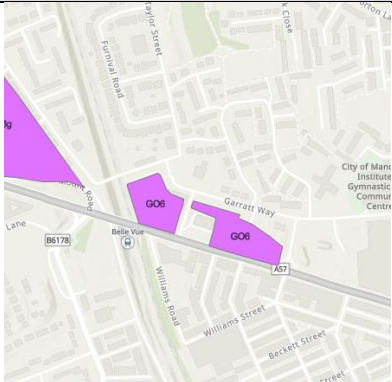

Site Ref.	Site Name	UDP Area	Uses in UDP Policies	Description	Gross Area (ha)	Developable Area (ha)	Recommendations
AB8i	Land adjacent to Daisy Works	Central Manchester	Small workshops/light industrial	 <p>This site contains the Jamia Islamia Mosque, a car dealership, vehicle repair service, a petrol filling station and housing. No vacant land remains.</p>	0.86	0	Deallocate the non-employment uses. The remaining employment uses are unlikely to be redeveloped in the current planning horizon. Support ongoing employment use
HU9	Former Birley Playing Fields	Central Manchester	Business, Industrial or commercial	 <p>This site has been built out providing several large office buildings as well as a multi-storey car park and</p>	3.76	0	This is unlikely to be redeveloped in the current planning horizon. Support ongoing employment use.

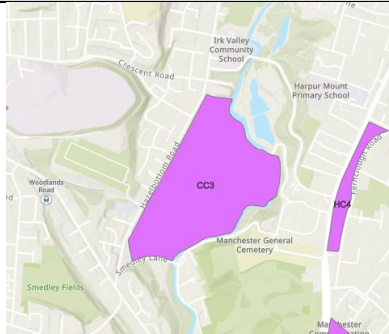
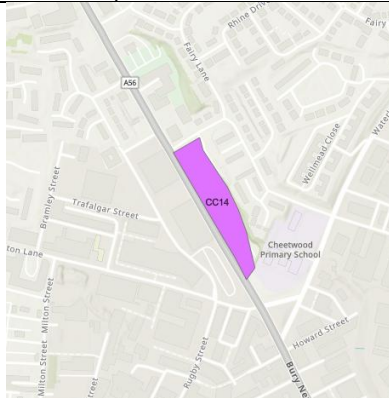
Site Ref.	Site Name	UDP Area	Uses in UDP Policies	Description	Gross Area (ha)	Developable Area (ha)	Recommendations
				a green energy centre associated with the adjacent Manchester Metropolitan University's Birley Campus.			
LL8	Land between Redgate Lane and Belle Vue Avenue	Central Manchester	Commercial/ business uses	 <p>This site has been built on providing two two-storey office buildings and a veterinary surgery and well-being unit. There remains one vacant grass plot in between the two office buildings, however arranging access to the site will likely be complicated.</p>	1.64	0.22	The remaining area could accommodate a range of employment uses. Support ongoing employment uses on existing areas.
LL13	Corner of Stanley Grove/Stockport Road	Central Manchester	Retail and/or business purposes	 <p>This site has been built on providing a Lidl and an associated car park</p>	0.85	0	Deallocate as the site no longer has an economic function

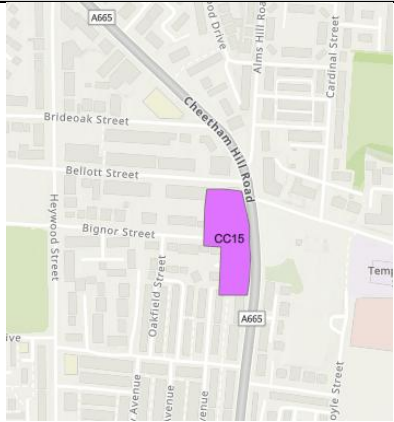
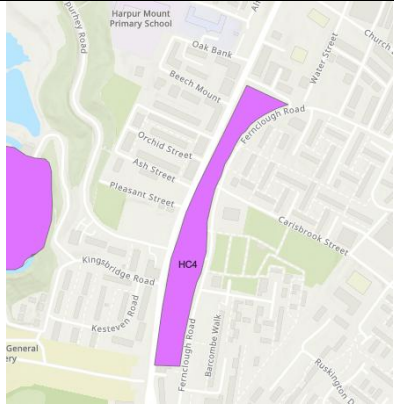
Site Ref.	Site Name	UDP Area	Uses in UDP Policies	Description	Gross Area (ha)	Developable Area (ha)	Recommendations
RF7	Land at Dagenham Road	Central Manchester	Small scale industrial and commercial	 <p>Set behind the high street of Rusholme, this site contains a collection of poor to average quality industrial premises. All premises suffer from very narrow access. Occupiers are mostly in the food sector with caterers, wholesalers and a restaurant present</p>	0.33	0	This is unlikely to be redeveloped in the current planning horizon. Deallocate for employment uses.
AB7	Land at junction of the Intermediate Ring Road and Hyde Road (NE)	East Manchester	Business/commercial development, hotel		1.17	0	This site is mainly in non-employment use and is unlikely to be redeveloped in the current planning horizon. However, it has strong locational advantages and could accommodate a range of employment uses.



Site Ref.	Site Name	UDP Area	Uses in UDP Policies	Description	Gross Area (ha)	Developable Area (ha)	Recommendations
				This site sits in a prominent location at the intersection of the A57 and the A6010. The site comprises a large Club 3000 Bingo Hall and car park along with a small bar and café along the Hyde Road frontage and a small office and garage lining the Birch Street frontage.			
AB8c	Former Roy Hall Cash and Carry	East Manchester	Commercial (non-retail)	 <p>This site comprises a large B&M home store and garden centre.</p>	1.06	0	Deallocate as the site no longer has an economic function
AB8g	Land at Queensland Road/Crossley Road	East Manchester	Commercial/industrial		2.36	0	Deallocate as the site no longer has an economic function



Site Ref.	Site Name	UDP Area	Uses in UDP Policies	Description	Gross Area (ha)	Developable Area (ha)	Recommendations
				This site has been fully developed out to provide residential and student accommodation.			
AB9	Land to the West of Preston Street	East Manchester	Industrial uses	 <p>This site has been fully built out providing two industrial buildings comprising six units.</p>	0.65	0	Support ongoing employment use
GO6	Hyde Road (W)	East Manchester	Industrial, commercial or retail	 <p>This site has recently been developed for an Aldi supermarket and car park</p>	0.58	0	Deallocate as the site no longer has an economic function

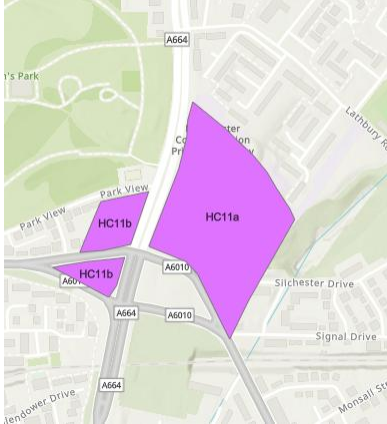

Site Ref.	Site Name	UDP Area	Uses in UDP Policies	Description	Gross Area (ha)	Developable Area (ha)	Recommendations
GO6	Hyde Road (E)	East Manchester	Industrial, commercial or retail	 <p>This site comprises a freestanding KFC and a retail/trade counter unit.</p>	0.67	0	Deallocate as the site no longer has an economic function
LL9	Land fronting Hyde Road	East Manchester	Commercial activities	 <p>Located adjacent to the recently developed Co-op Academy, this plot is currently flat and vacant.</p>	0.49	0.49	This site could accommodate a range of employment uses.

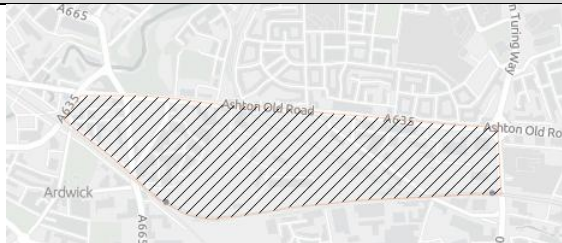
Site Ref.	Site Name	UDP Area	Uses in UDP Policies	Description	Gross Area (ha)	Developable Area (ha)	Recommendations
CC3	Hendham Vale Industrial Park	North Manchester	Business/industrial	 <p>This site comprises a large and busy industrial estate that is fully built out. Generally, the units are older however they are well occupied and in a reasonable state of repair</p>	16.41	0	This site is performing a key employment function for the local area and any redevelopment would have to find alternative accommodation for the current occupiers. Support ongoing employment use.
CC14	Bury New Road/Fairy Lane	North Manchester	Commercial such as wholesale cash and carry	 <p>This site has been partly built on, providing several retail units however the section to the north remains a vacant, slightly sloped, grass plot.</p>	1	0.65	This site would most likely accommodate industrial or trade counter uses.

Site Ref.	Site Name	UDP Area	Uses in UDP Policies	Description	Gross Area (ha)	Developable Area (ha)	Recommendations
CC15	Cheetham Hill Road/Bignor Street	North Manchester	Business uses, subject to a high quality of design	 <p>This site has been built out providing a medical centre as well as residential properties</p>	0.64	0	Deallocate as the site no longer has an economic function
HC4	Land between Rochdale Road and Fernclough Road	North Manchester	Retail, commercial and residential	 <p>This site comprises residential properties in the north while a vacant plot remains in the south, covered in trees and grass. A short footpath cuts through the vacant plot while small sculptures are also present.</p>	1.88	0	This would most likely be suited to residential or retail uses given that it is surrounded by residential properties. Deallocate

Site Ref.	Site Name	UDP Area	Uses in UDP Policies	Description	Gross Area (ha)	Developable Area (ha)	Recommendations
HC10a	Dalton Street	North Manchester	Commercial/business uses	 <p>This site comprises mainly flat vacant land, some in use for a car park, along with two disused industrial buildings. The site has permission (136814/FO/2023) for a phased residential led mixed use development comprising 1,551 residences alongside associated commercial, business, service and community uses. As of March 2024, the works had begun on site.</p>	2.06	0	Deallocate as the site no longer has an economic function
HC10b	"CIS" Site at Rochdale Road and Miller Street	North Manchester	Commercial/business uses	 <p>This site lies within the NOMA Masterplan area. The site itself has so far seen the development of 1 Angel Square, a large high quality office building occupied by the Co-operative Group and Angel Gardens, a 466-apartment private rented scheme. The remaining developable land comprises Plot M and Plot N of the</p>	2.28	0.62	This is a very attractive city centre office location. Support ongoing employment use

Site Ref.	Site Name	UDP Area	Uses in UDP Policies	Description	Gross Area (ha)	Developable Area (ha)	Recommendations
				NOMA Masterplan. This site has in currently in use as a car park while a temporary marketing facility has been constructed. However, this site has permission (134307/FO/2022) for the erection of two mixed use office buildings, 2 and 3 Angel Square, comprising 39,184 sqm of office and 1,286 sqm of commercial floorspace.			
HC10c	Oldham Road Goods Yard	North Manchester	Commercial/ business uses	 <p>This large site lies in Ancoats on the fringes of the city centre. The majority of the site is in use by the Royal Mail as a delivery and sorting office. Adjoined to the Royal Mail premises, on the Thompson Street frontage, is a small distribution centre.</p>	5.66	0	This site is occupied by a mail centre; however it does appear to be an inefficient use of space in a city centre fringe location. Within Victoria North residential area and thus to be deallocated.
HC11a	Land adjacent to junction of Rochdale Road/Queens Road	North Manchester	Commercial/ business uses		3.43	0	Deallocate as the site no longer has an economic function

Site Ref.	Site Name	UDP Area	Uses in UDP Policies	Description	Gross Area (ha)	Developable Area (ha)	Recommendations
				This site has been fully built out with the premises of Manchester Communication Academy being present on site and residential properties in the south.			
HC11b	Western frontage of Rochdale Road, south of Queens Park (N)	North Manchester	Commercial/business uses	 <p>This site has been fully built out to provide residential housing.</p>	0.49	0	Deallocate as the site no longer has an economic function
HC11b	Western frontage of Rochdale Road, south of Queens Park (S)	North Manchester	Commercial/business uses	 <p>This site comprises a Chinese takeaway, associated parking and two advertising billboards. These uses are surrounded by vacant land covered in grass and trees. The site is awkwardly shaped with a road</p>	0.29	0	Deallocate as the shape and size of the land limit the scope of what can be delivered on site while the surrounding area is dominated by residential uses.

Site Ref.	Site Name	UDP Area	Uses in UDP Policies	Description	Gross Area (ha)	Developable Area (ha)	Recommendations
				running through the centre, separating it into two parcels.			
East Manchester Subareas							
EM17	Ardwick Yard and Kay Street	East Manchester	East Manchester policy identifies area for B2/B8 Industrial uses,	 <p>Large, linear collection of commercial uses in multiple ownerships, though MCC the largest landholder. Rail corridor forms the southern boundary. Significant mix of quality of uses, from modern to poor. Some overcrowded areas, with on-street parking causing congestion. Potential for regeneration/intensification of some employment uses.</p>			Retain for employment uses. Encourage regeneration and refurbishments of older buildings. Potential for development of vacant and underutilised backland areas.
Total					149.47	42.25	

16.0 SUMMARY AND RECOMMENDATIONS

16.1 The focus of this employment land review is to assess the key employment nodes throughout Manchester and their potential for further growth and redevelopment for employment uses to meet the requirements as outlined in the Places for Everyone and the supporting calculation paper, which are for Manchester:

- Office requirement: 1,450,895 sqm
- Industrial and warehousing requirement: 77,896 sqm

16.2 The Joint Development Plan Places for Everyone states that the City Centre (which also includes areas within Salford City) would provide more than half of Greater Manchester's total office requirement of 2,019,000, which equates to more than 1,009,500 sqm being provided in the City Centre between 2022 and 2039.

Meeting the Floorspace Requirement

16.3 Manchester City Council has prepared estimates of potential floorspace supply within the City (Employment Land Supply, 2023), the data of which has been supplied to BE Group for analysis. The table below includes a breakdown of the potential floorspace supply if all permissions and proposals come forward. This includes the potential floorspace supply in the City Centre and Fringe area, which are critical for the overall provision of E(g) office space for Manchester. The 'Other' areas are collectively the smaller office and industrial nodes throughout the City.

Table 39 – Floorspace Supply Potential by Key Node (sqm)

Location	Office E(g)	Industrial/ Warehousing B2/B8
City Centre	1,422,601	2,896
Fringe	341,796	469
Holt Town	32,120	0
Eastlands (Sportcity)	45,000	0
Central Park	25,248	740
Strangeways	125,891	11,771
North Manchester General Hospital	23,360	0
Airport City (MIX Manchester)	156,824	5,309
University Hospital South Manchester	60,000	127
Roundthorn	0	0
Sharston	18	0
Other	15,071	9,053
Total	2,246,929	30,365

Source: Employment Land Supply database 2023, MCC

- 16.4 However, some further planning and information has emerged since the above estimates were prepared. Furthermore, through the analysis of this report, some of the floorspace yields have been updated (see chapters on each area). Therefore, the table below provides adjustments to the some of the estimated supply figures based on known masterplan floorspace provisions, updated planning or refined estimates of floorspace yields.

Table 40 – Floorspace Supply Potential by Key Node (sqm)

Location	Office E(g)	Industrial/ Warehousing B2/B8
City Centre	1,422,601	2,896
Fringe	341,796	469
Holt Town	55,500	0
Eastlands (Sportcity)	0	0
Central Park	20,400	8,040
Strangeways	160,600	2,000
North Manchester General Hospital	23,360	0
Airport City (MIX Manchester)	0	186,000
University Hospital South Manchester	51,000	0
Medipark	86,000	0
Roundthorn	0	6,200
Sharston	0	51,600
Other	15,071	9,053
Total	2,176,328	266,258

Sources: Employment Land Supply database 2023, MCC; Masterplans for Airport City, University Hospital & Eastlands, BE Group analysis

- 16.5 Noted changes include at Airport City (MIX Manchester) and the latest masterplan intentions for an advanced manufacturing led scheme, rather than an office led

scheme; a higher estimated office yield for the University Hospital; reducing the potential office floorspace yield at Eastlands (Sportcity); reflecting the plans for Holt Town; and reflecting the draft plans for Strangeways.

- 16.6 Comparing these adjusted figures for floorspace potential to the requirements for Manchester City to 2040 (paragraph 16.1), overall the City has sufficient supply to meet requirements for both office and industrial and warehousing. For the office market, the City Centre would be expected to take the bulk of the requirement and with a potential supply of some 1.42 million sqm, which could almost meet the full office requirement for the City to 2040 (1.45 million sqm). The Fringe, University Hospital, Medipark, Holt Town, Strangeways and other areas offer alternative office locations, providing choice of location, price point, specialisation and profile for potential occupiers.
- 16.7 For the industrial and warehousing requirement for the City of about 78,000 sqm, this can only be met with MIX Manchester coming forward at the Airport, which would provide up to 186,000 sqm of mixed floorspace, led by advanced manufacturing. For more generic industrial and warehousing demand, the City is reliant on smaller availability, such as at Sharston or Central Park
- 16.8 Further to the above, the UDP allocations could provide further floorspace supply that has not been included in the tables. Based on BE Group's estimates of redevelopable areas within the UDP sites, some 19,280 sqm of office space and 35,320 sqm of industrial/warehousing floorspace could be delivered through further development within the UDP sites. Given the relatively limited industrial and warehousing options in the City, such redevelopments in these locations may need to be pursued.

Summary of Areas

- 16.9 The following summarises the nodes of employment and their potential for employment floorspace growth. The table highlights key issues to be addressed, catalyst sites and overall floorspace potential.

Table 41 – Summary of Employment Nodes

Location	Key Opportunities	Key Issues	Catalyst Sites
Central Park	Development of Lowry Park may incentivise regeneration of other older industrial stock in the area. Digital creative and high amenity office space provide opportunities for development of Central Park (North), though likely to remain a difficult proposition in the current market.	Lack of office development at Central Park (North) for several years. Identifying further digital creative proposals to bring forward sites at Central Park. Amalgamation of industrial sites for comprehensive regeneration. Managing loss of fringe sites for housing.	Lowry Park Central Park (North)
Eastlands (Sportcity)	Opportunities are outside of E(g)/B2/B8 employment uses.	Potential loss of employment floorspace at Edwin Road Industrial Estate for the Sport and Innovation Zone.	
Airport City	MIX Manchester proposal is for a high-quality advanced manufacturing, science and innovation campus.	Attracting sufficient science and advanced manufacturing occupiers in a competitive market. Labour force attraction. Pressures to provide large scale logistics floorspace.	Full site
University Hospital South Manchester	Redevelopment of the Hospital provides an opportunity to develop a comprehensive medical and research campus that will be a leading regional and national asset.	Identifying sufficient office and laboratory occupiers for the full site. Funding Decanting and reoccupation of hospital buildings	
Medipark	The Medipark proposal provides an opportunity to support the University Hospital South Manchester redevelopment, providing a more comprehensive node of medical research.	Keeping the Medipark site focused on medical and supporting uses, rather than for wider employment.	Redevelopment of University Hospital South Manchester
Strangeways	Mixed use development opportunities incorporating E(g)/B2/B8 and other elements, including residential.	Potential net loss of employment floorspace Amalgamation of sites for a comprehensive development. Potential relocation of existing occupiers to allow for redevelopment. Addressing black market uses.	Sites in south of node, with access to City Centre. Potentially HMP Manchester site if it becomes available.

Location	Key Opportunities	Key Issues	Catalyst Sites
Sharston	Potential to reinvigorate older elements of the estate for new industrial employment uses.	Demolition and site remediation costs.	Paston Road Sites Site at intersection of Leestone and Sharston Roads
Roundthorn	Potential to reinvigorate older elements of the estate for new industrial employment uses.	Demolition and site remediation costs. Potential to link with Hospital redevelopment.	Ledson Road
Holt Town	Creative and mixed-use opportunity, particularly along the Ashton Canal corridor. More mixed employment and other uses elsewhere.	Protect and enhance the creative sector, particularly for textiles. Manage the evolution of dirty elements in this node. Retain affordable workspaces.	Brunswick Mill Grassed area west of Beswick Street.
North Manchester General Hospital	Comprehensive health and wellbeing campus in line with Strategic Regeneration Framework	Managing works while retaining on-going hospital functions. Development of quality workspaces to encourage occupation by target users. Funding	Healthy Neighbourhood Hub

Source: BE Group analysis of nodes, 2025