



Marsh Barton

Regeneration Opportunity Area Report

January 2026

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MARSH GREEN ROAD WEST, MARSH BARTON.

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Appendix A Site Context

Appendix B Technical Constraints

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Comment Final Report

This document has been prepared and checked
in accordance with ISO 9001:2015

All data gathering, precedent studies, contextual information and constraints and opportunity analysis was undertaken in July 2022.

1.0 A more productive future?

This report explores the potential over the longer term to regenerate areas within Marsh Barton, making more efficient use of land and delivering new jobs and homes.

The context and data show that while the area performs an important economic role for the city, parts of the area do not maximise their productive potential and the area underperforms on its placemaking potential as an attractive, vibrant and low carbon part of the city.

There are many opportunities but also significant constraints that regeneration would need to address. The constraints shows a complex picture overall, with limited immediate constraint-free land. Hence, it is likely that change will be longer term.

The report looks to a future where Marsh Barton delivers new jobs and homes within a sustainable and attractive environment, making more efficient use of land and at the same time contributing to net zero objectives.

Exemplars from across the UK are presented, demonstrating that positive change that delivers jobs and homes is possible.

The Exeter Plan seeks to make the most efficient use of land within the urban area. Policy H3: Regeneration opportunity areas of the emerging Exeter Plan supports proposals for the regeneration of brownfield land.

Example developments for two areas show how parts of Marsh Barton could start to come forward over the longer term to deliver pockets of regeneration in accordance with H3: Regeneration opportunity areas.

Study Area Plan



 Study area

2.0 How is Marsh Barton functioning today?

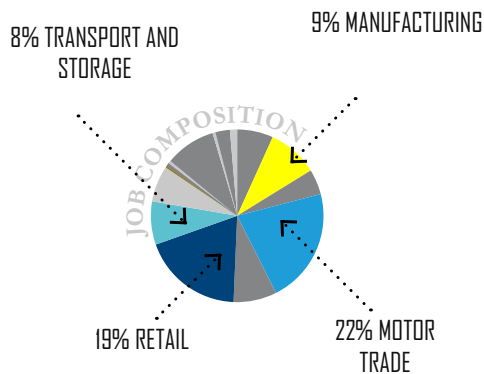
When Marsh Barton trading estate was conceived in the mid-20th century, it was situated at the fringe of the historic city of Exeter - providing a new, discrete area away from the nearby residential community of St Thomas for business, industrial and leisure. It continues to fulfil an important economic role for the city, providing space for over 3500 workers and 450 businesses.

The mix and distribution of uses within Marsh Barton and its overall economic vitality shows that there is a demand for the facilities and services it offers. Food and drink uses have clustered on Alphington Road, leisure uses meeting the needs of the city make use of cheap and flexible warehouses. Retailers offer products that people need in an accessible and affordable location.

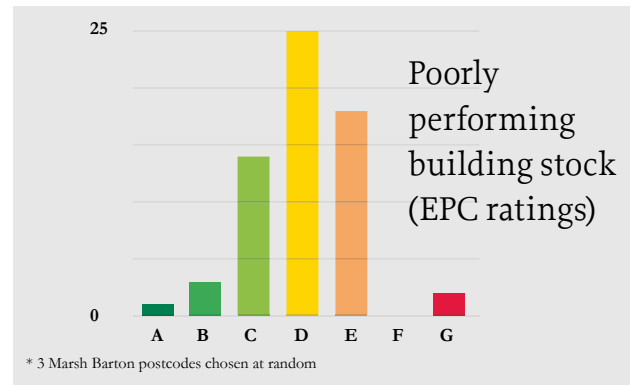
However it under performs against its potential as a vibrant and attractive part of a successful Exeter, and its fabric is in need of renewal to meet the challenges of decarbonisation. Parts of Marsh Barton are under utilised, with low floor area ratios and large areas of hardstanding indicating inefficiency.

Marsh Barton has the potential to retain many of its existing functions but also help contribute to the delivery of the Liveable Exeter vision of large-scale transformational development and infrastructure renewal.

Trip generating uses

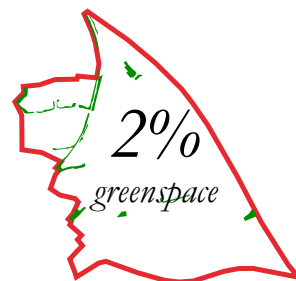


8,000 vehicles on site



F Carbon rating (C is national average)

Van driving, consumption of goods and services, flights and use of gas (CRED Place-Based Carbon Calculator, 2022)



0 LISTED BUILDINGS

450 £ existing businesses

80 Hectares of potential

Close to the river, canal and Riverside Valley Park

EXETER
LIVE BETTER

New rail station



2/3rds of commutes within a 5km distance of the site



3.0 Opportunities and constraints

The new railway station and synergies between the site and the adjacent Liveable Water Lane neighbourhood generate major opportunities to forge a stronger relationship with the surrounding areas and deliver long term regeneration. As Exeter expands in the South West, Marsh Barton is no longer a peripheral location and there is potential to exploit its pivotal location.

However, it is also a large and complex area with multiple factors that determine how change might come forward. The summary plan opposite identifies the crucial influences, which include:

- * Small fragmented land parcels throughout the site.
- * Constrained public sector land along the railway corridor in the east.
- * Long leases in the most attractive public sector owned areas in the north-west.
- * Noise emitting uses in the west in prominent locations.
- * Flooding constraints- The area is identified as being at high risk of flooding.

- * Contamination due to former and current uses that add remediation costs for sensitive land uses such as private gardens and schools.
- * Transport constraints such as vehicular congestion on Alphington Rd.

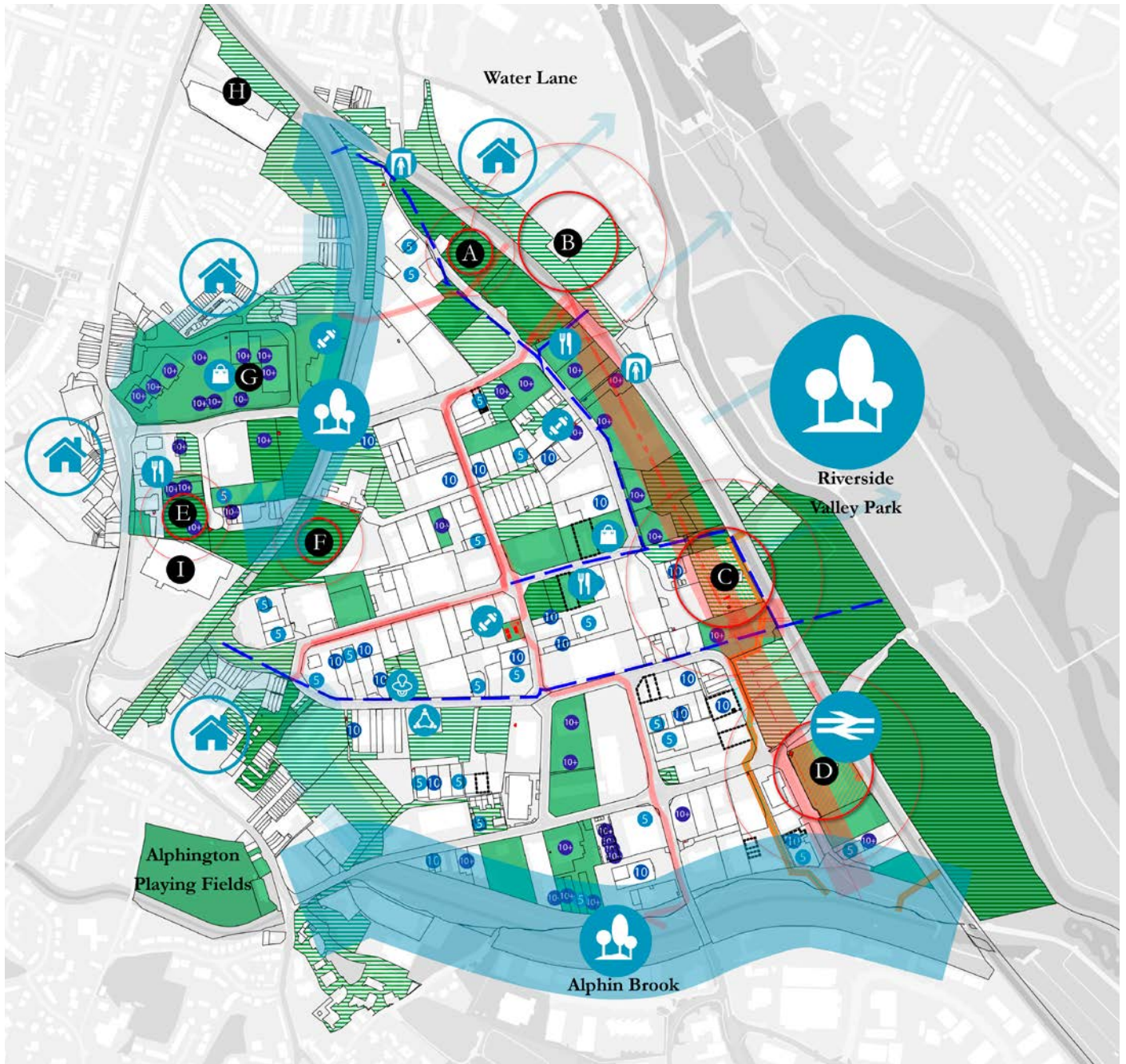
There are also many positive uses on site that are compatible with mixed use development and need to be retained and supported, as well as some important site features and opportunities to positively interface with Alphin Brook to the south and the residential fringes of St Thomas and Alphington to the west.

Any development proposition must respond to the opportunity and the realities of delivery. Proposals need to respond to the different challenges and opportunities of different parts of the site, but always adhering to the criteria in policy H3: Regeneration opportunity areas.

A more detailed summary of constraints and opportunities are available in the following appendices:

- * Appendix A- Site Context
- * Appendix B- Technical Constraints
- * Appendix C- Land and Property.

Constraints and Opportunities Plan



- A** Exton Rd recycling centre
- B** Water Lane Bulk Supply Point
- C** Gas generator energy plan
- D** Waste to energy plant
- E** CarTakeBack
- F** Sims Metal Management
- G** Exeter Retail Park
- H** Alphington Rd Retail Park
- I** Sainsbury's

- Public sector land
- Underutilised land
- Noise emitters
- Large diameter surface water mains
- 60m pylon offset
- Indicative easement to electricity cable routes
- Indicative easement to gas main

- Substations
- Vacant premises
- 5 Leases with under 5 years left
- 10 Leases with under 10 years left
- 10+ Leases with over 10 years left
- Land registry parcels

4.0 Exemplars from across the UK and beyond

Caxton Works, Canning Town, London

- * A recent exemplar of industrial and residential combined into a series of urban blocks.
- * 336 apartments @ 377 dwellings per hectare.
- * 2390 sqm of employment and manufacturing floorspace arranged over two ground floors.
- * Shell and core units.
- * High floor to ceilings to allow for mezzanine level to be inserted.
- * Predominantly B1 use with some A3.
- * Pedestrianised central street creates a mini high street for units.



Scale precedents

Caxton Works



0m 100m 200m

Stone Lane Retail Park, Marsh Barton



Climate Innovation District, Leeds

- * New district developed by developer CITU and enabled through council lending via the regional revolving investment fund.
- * 955 homes, workspaces and retail.
- * Density of 132 dwellings per hectare (early phases).
- * Designed around recognised principles for creating truly sustainable places to live, focusing on promoting positive behaviours linked to transport, energy, housing, and ecosystems
- * Achieves close to Passivhaus standard.
- * On-site MMC factory to build homes.
- * A mix of residential and commercial units developed to create a strong sense of community and integration within the local context.



Scale precedents

Climate Innovation District, Leeds



Stone Lane Retail Park, Marsh Barton



Paintworks, Bristol

- * A mixed-use community including residential, live-work units and studio/office space
- * Aiming for a less polished and more genuine regeneration; a place people actually want to live, work and interact and includes repurposed buildings.
- * Most of first phase was let or sold by word of mouth.
- * Lots of effort has gone in to the design of the street scene to make spaces and uses integrated.
- * The mix of creative tenants, exhibition/event space and popular café/bar quickly defined a distinctive emerging character in Paintworks' early years.
- * Largely car-free within the development, although utilises undercroft parking.
- * Circa 120 dwellings per hectare.



Scale precedents

Paintworks



Stone Lane Retail Park, Marsh Barton



Travis Perkins, Kings Cross

- * Residential, including student housing (564 beds) above builders merchant.
- * Density of over 1,000 dwellings per hectare.
- * Breaking up service areas with active frontages (housing lobby, shop frontage) and using screens for yards
- * Minimum width street with segregated cycle lane
- * Street trees and high quality paving
- * Roofs above builders merchant not used for gardens for residential
- * Vehicles and people not separated, public realm reflecting inner city streetscape with HGV access adapted.



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Scale precedents

Travis Perkins



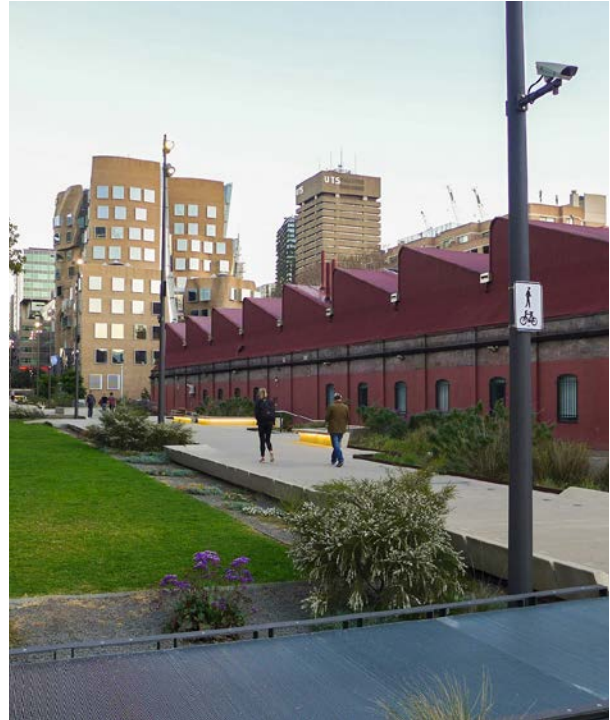
0m 50m 100m

Stone Lane Retail Park, Marsh Barton



The Goods Line, Sydney

- * Key strategic link connecting important destinations in the neighbourhood Ultimo and further into Sydney.
- * Important open space for the neighbourhood.
- * Creative ways of dealing with a long linear space and level change.
- * Strong public realm against modest large scale buildings complemented by key landmark buildings.



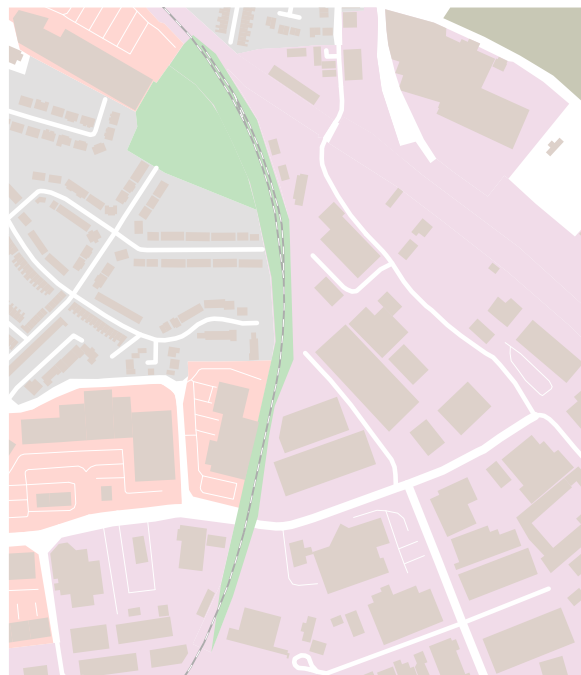
"The Goods Line 201708" by Wpcpey is licensed under CC BY 4.0. To view a copy of this license, visit <https://creativecommons.org/licenses/by/4.0/?ref=openverse>.

Scale precedents

The Goods Line



Disused railway sidings, Marsh Barton



0m 100m 200m

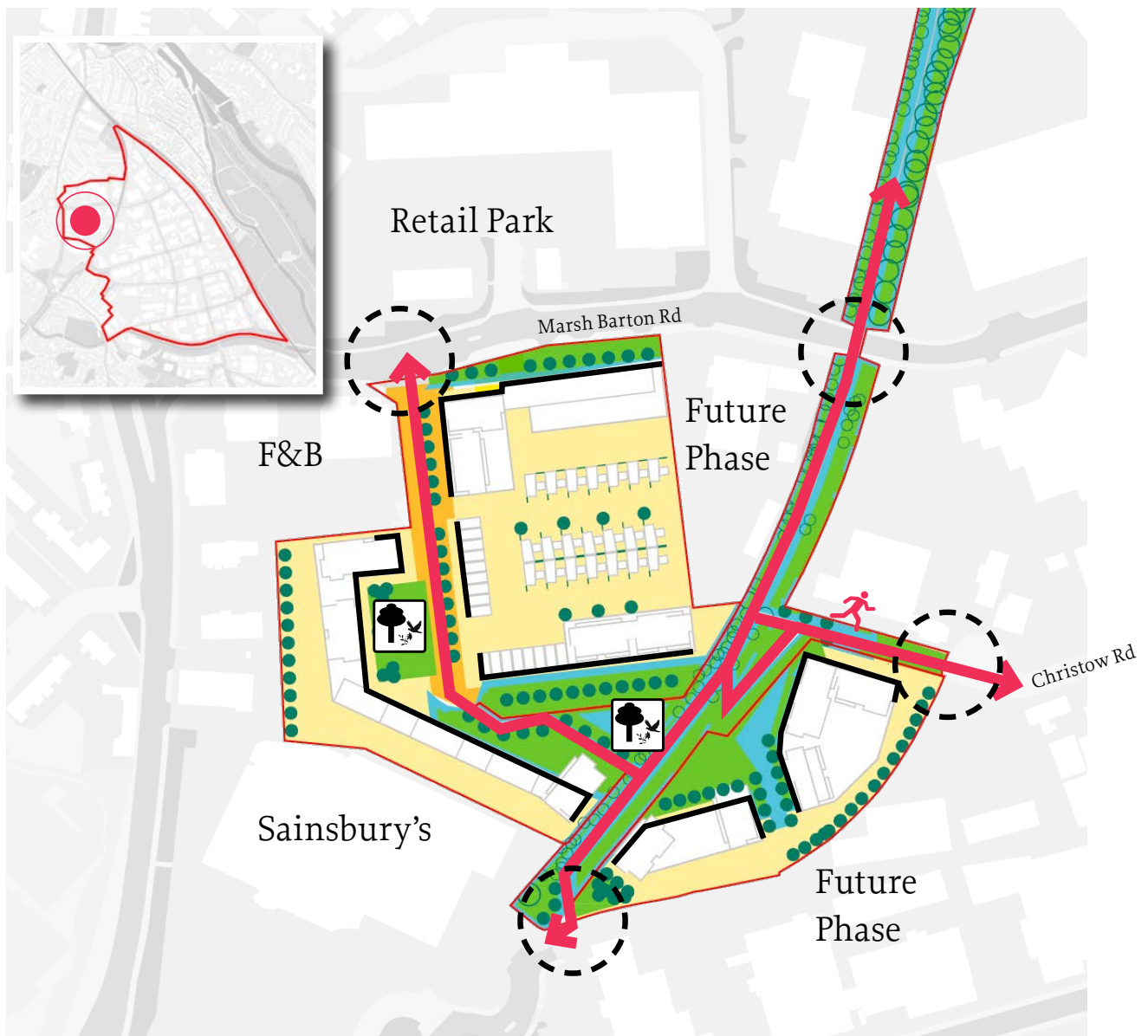
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5.0 Example developments

This section presents two examples of possible regeneration for areas along the western edge of Marsh Barton that apply some of the lessons from the exemplar schemes in the previous section.

Hatherleigh Park

Hatherleigh Park is an exciting opportunity to deliver a mixed use first phase close to existing amenities with a new park at its heart.



- * Typical net density 150 DPH- 3 storey townhouses and 5 storey apartment blocks framed by high quality public realm and a new park.
- * Circa 350 dwellings and 7100 sqm of other floorspace.
- * Employment floorspace at ground level roughly matches existing floorspace provision.
- * Strong frontage along main streets and screening the rear of Sainsbury's.
- * Mix of retail and co-working space along the main streets, with workshops and community/nursery space embedded into the scheme.
- * Allowance of 1000 sqm at ground floor for mobility hub.
- * Allowance of up to 0.5 spaces per unit with EV charging. Parking provision to be revised down in subsequent phases.

Key delivery considerations

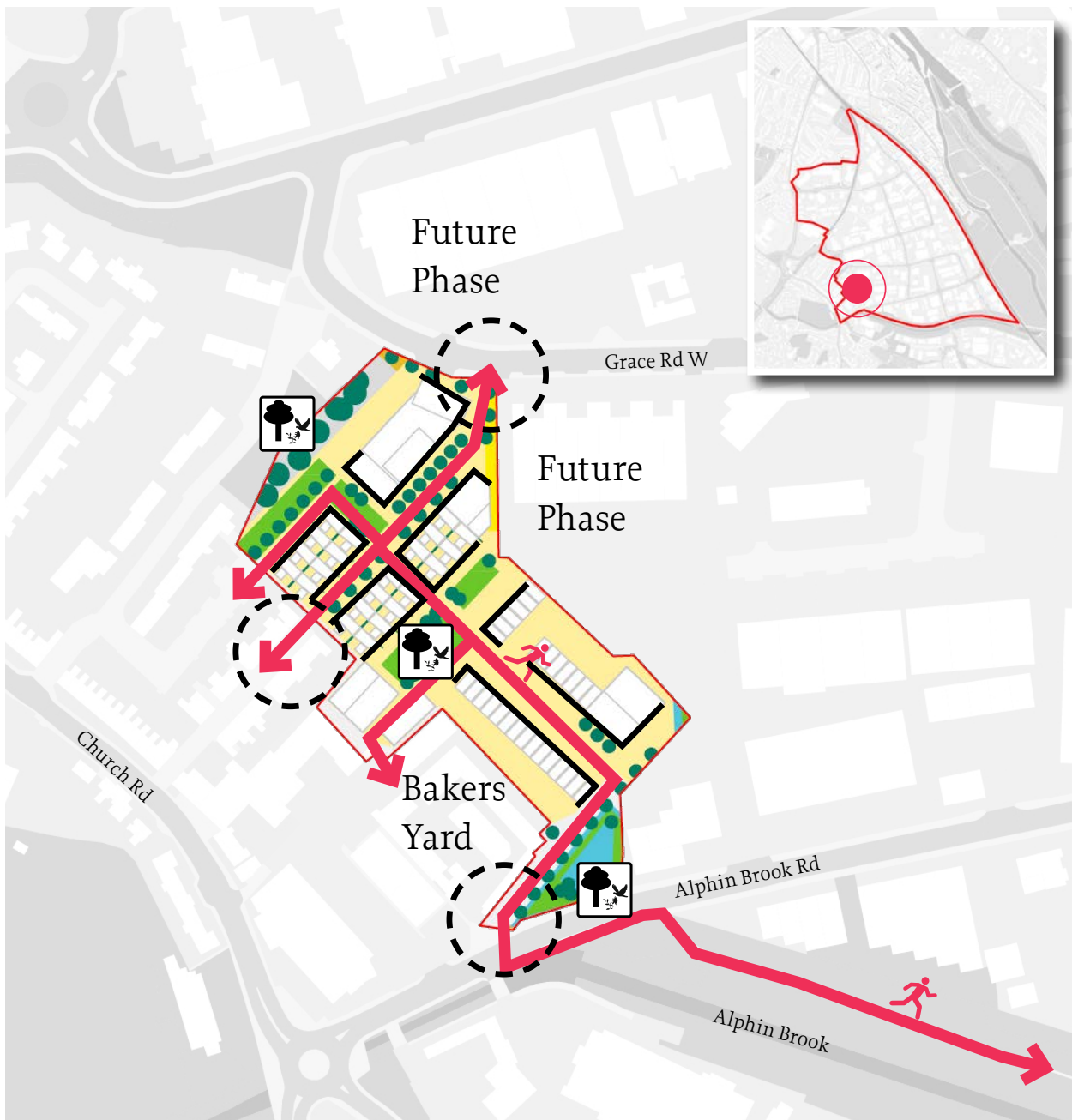
- * 2 scrapyards within this area are public sector owned. Enabling works required to relocate these elsewhere, either further east or off-site. Leases are unknown and require further investigation.
- * Existing businesses may need to be relocated as a condition of terminating their lease. There is an additional cost to be considered and programme implications.
- * Requires a clear mobility strategy, including utilising the disused rail line as an active route.



Precedent images of apartment buildings overlooking high quality public realm.

Bakers Square

Bakers Square is a mixed-use proposition that builds on the quirkiness of Bakers Yard as a 'place anchor' and opens up existing residential streets and open spaces.



- * Typical net density 100/125 DPH- 3 storey townhouses and 5 storey apartment blocks.
- * Circa 105 dwellings and 2200 sqm of other floorspace.
- * Tight development grain with a mixture of townhouses and apartments above ground floor uses and a sequence of pocket parks that open up surrounding streets for active travel.
- * Employment floorspace exceeds existing floorspace by 1100 sqm and allows space for 75 additional net jobs.
- * Mix of retail space facing the strategic streets, with small scale workshops and community space nestled within the block structure.
- * Allowance of 1000 sqm for mobility hub.
- * Allowance of up to 0.5 spaces per unit with EV charging. Parking provision to be revised down in subsequent phases.

Key delivery considerations

- * No public sector land- potential private sector opportunity that requires a strong Design Code/ rationalisation of ownerships.
- * Only 2 land parcels required to deliver this first phase. Other private sector land leases adjacent to this phase are due to expire within the next 10 years which could offer further expansion opportunities.
- * Requires a clear mobility strategy, including maximising estuary connections.



Precedent images showing well enclosed apartments and terraced houses framed by planting.

Summary

The two example developments in this section explore how parts of Marsh Barton could come forward over the longer term to deliver regeneration in accordance with H3: Regeneration opportunity areas.

They have been used to illustrate the potential of the area as a whole, rather than proposals for individual sites. The examples emphasise the creation of genuine mixed-used developments that retain employment floorspace whilst providing greater intensity and diversity of land uses in a high-quality environment that capitalise on the area's location. Development proposals for any site will need to demonstrate how they deliver great placemaking, address site constraints and adhere to Policy H3 Regeneration opportunity areas.

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Marsh Barton

Regeneration Opportunity Area Report

Appendix A: Site Context

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Site Context

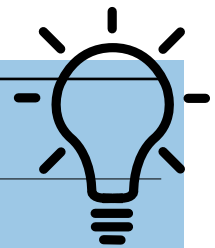
Land uses

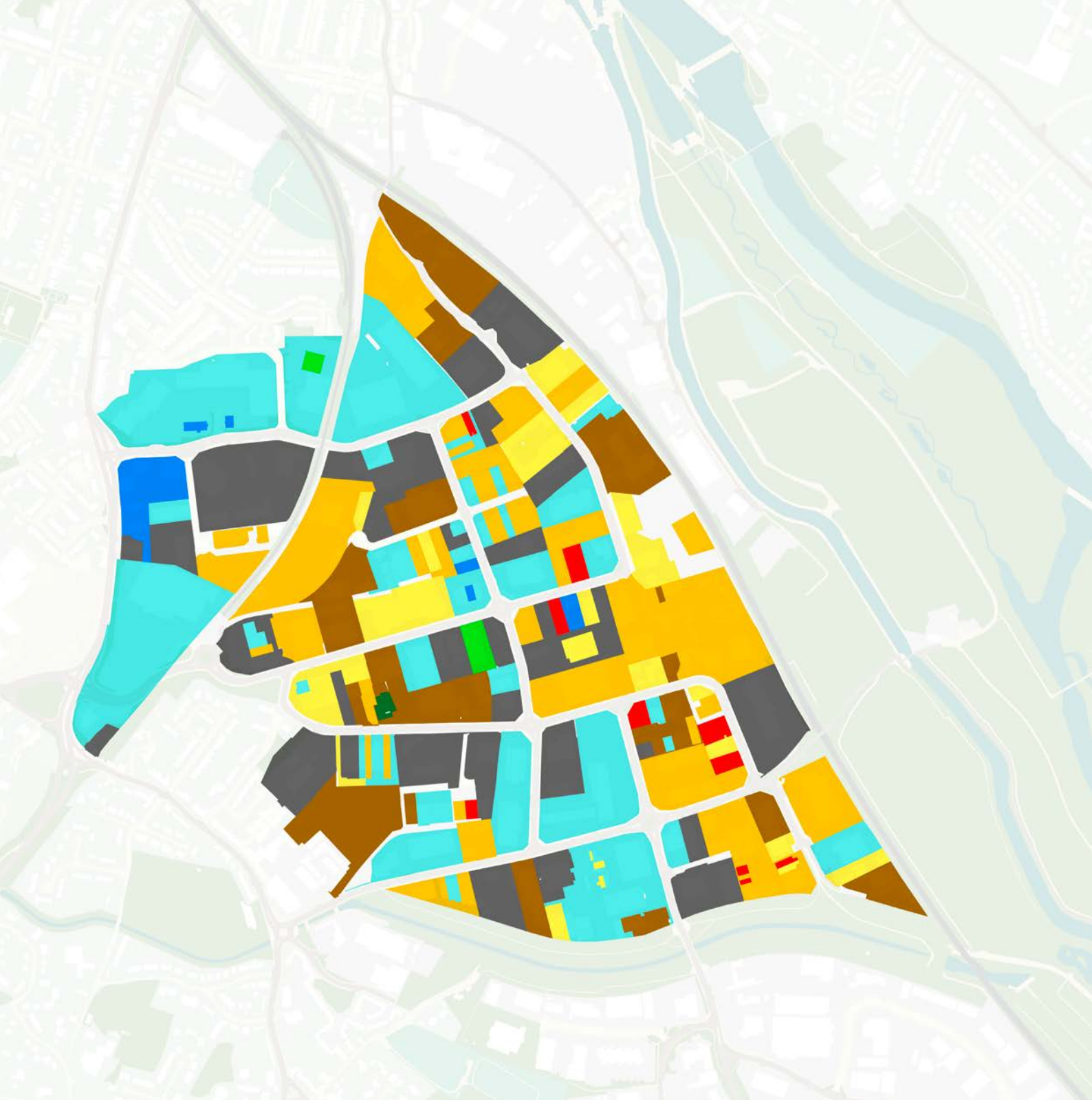
Marsh Barton is currently home to approximately 450 business and 3,500 jobs. Employment will continue to have a big presence within Marsh Barton and there are opportunities for new types of collaborative workspaces that create a greater employment density and free up space for a greater mix of uses.

- * Employment numbers fell from 4,000 in 2015 to 3,500 in 2020.
- * The overall job composition has stayed relatively static over the last 10 years, and there is little presence of creative industries.
- * A relatively low employment density overall due to space intensive activities and underutilised land.
- * Lack of vacant units indicates a high level of demand for units.
- * Currently a high proportion of smaller industrial (B1+B2) uses overall, followed by retail (A1) and car showrooms (SG).
- * A number of private and council run scrapyards within the site.

Key considerations

- * Compatibility of heavy industrial/scrap uses on site with new mixed use development.
- * High proportion of retail space that can be retained and integrated into ground floors below residential development.





- A1-Retail
- A3-F&B
- B1-Light industrial
- B2-General industrial
- B8-Storage/distribution
- D1-non resi (Gyms)
- D2-leisure (nursery)
- SG-(Showrooms and recycling)
- Vacant

Mobility

Marsh Barton and Water Lane have a unique opportunity to deliver integrated mobility solutions that can resolve transport challenges along the congested Alphington Rd corridor.

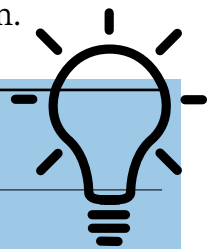
- * Recently opened Marsh Barton rail station provides a valuable connection into the city and sub-regional rail network.
- * Generally well served by bus links through the site, with a potential new link into Water Lane.
- * High levels of traffic congestion along Alphington Rd and Exe

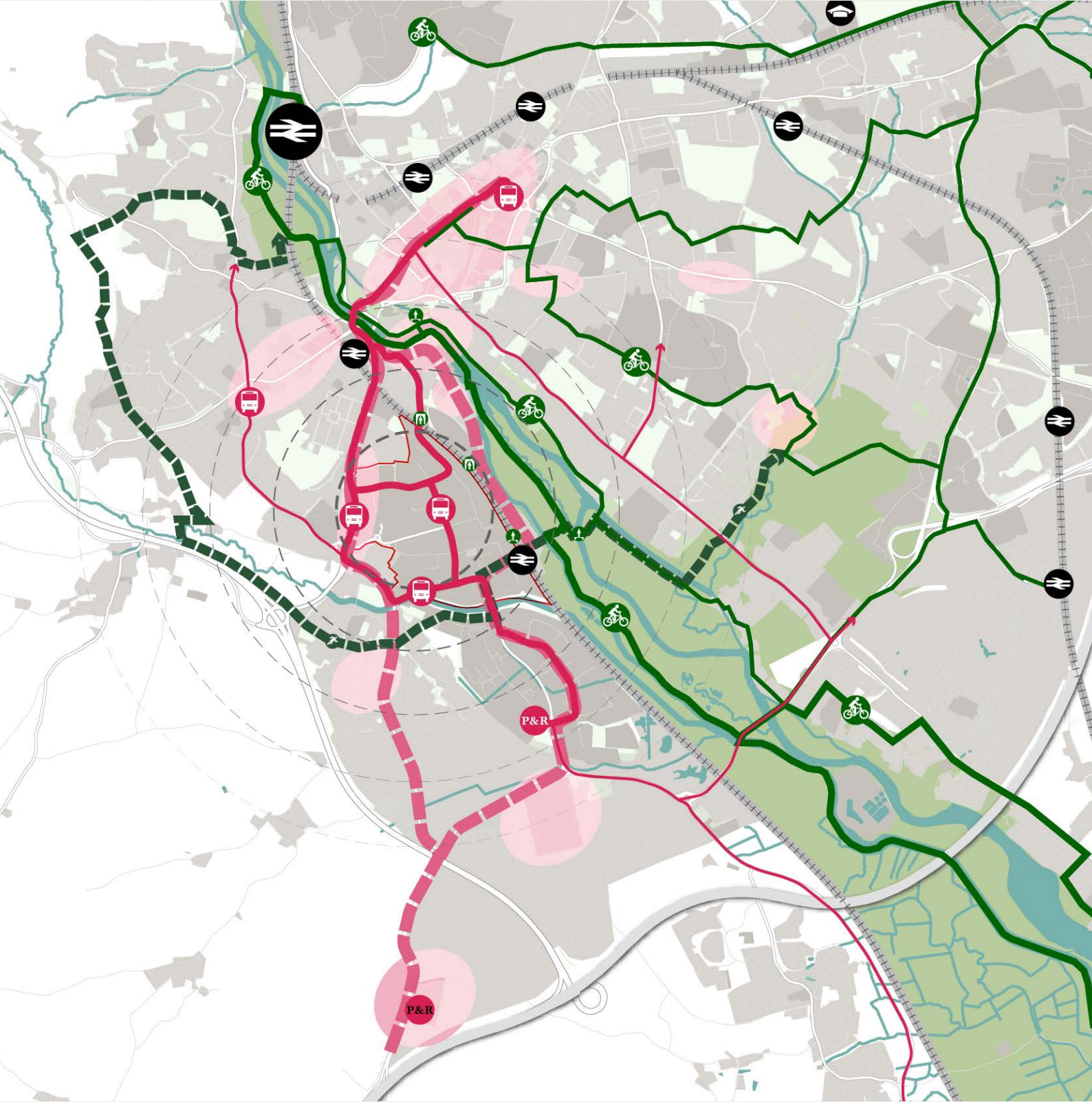
Bridges and little scope for increased capacity due to the constrained historic street structure.

- * Adjacent to the key E1 cycle route along the River Exe.
- * Limited number of pedestrian and cycle bridges across the River Exe and local severance issues to address.
- * Currently 58% of commutes to Marsh Barton are by car. However, 2/3rd of trips to Marsh Barton are within 5km, indicating the potential for a active trips to the site, even without factoring in a new residential population.

Key considerations

- * Potential for on-site mobility hub(s) to capture local and strategic traffic prior to Alphington Rd/ Exe bridges and create placemaking opportunities around active transport/ micromobility.
- * Impact of potential West Exe Park and Ride on current Matford Park and Ride and potential new mobility corridors.
- * Opportunity to introduce new employment and residential space that can help to reduce car demands and carbon.
- * Utilising the disused rail line as a new active travel corridor.





-  Green Circle Walk
-  Strategic cycleway
-  At grade underpass
-  Pedestrian and cycle bridge
-  Local railway station
-  Strategic railway station
-  Key bus routes
-  Other bus routes
-  Potential mobility corridors
-  Local centres/key mixed use
-  Existing park and ride
-  Potential park and ride

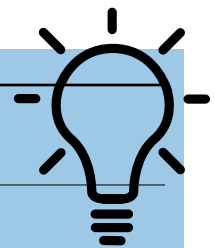
Local amenities

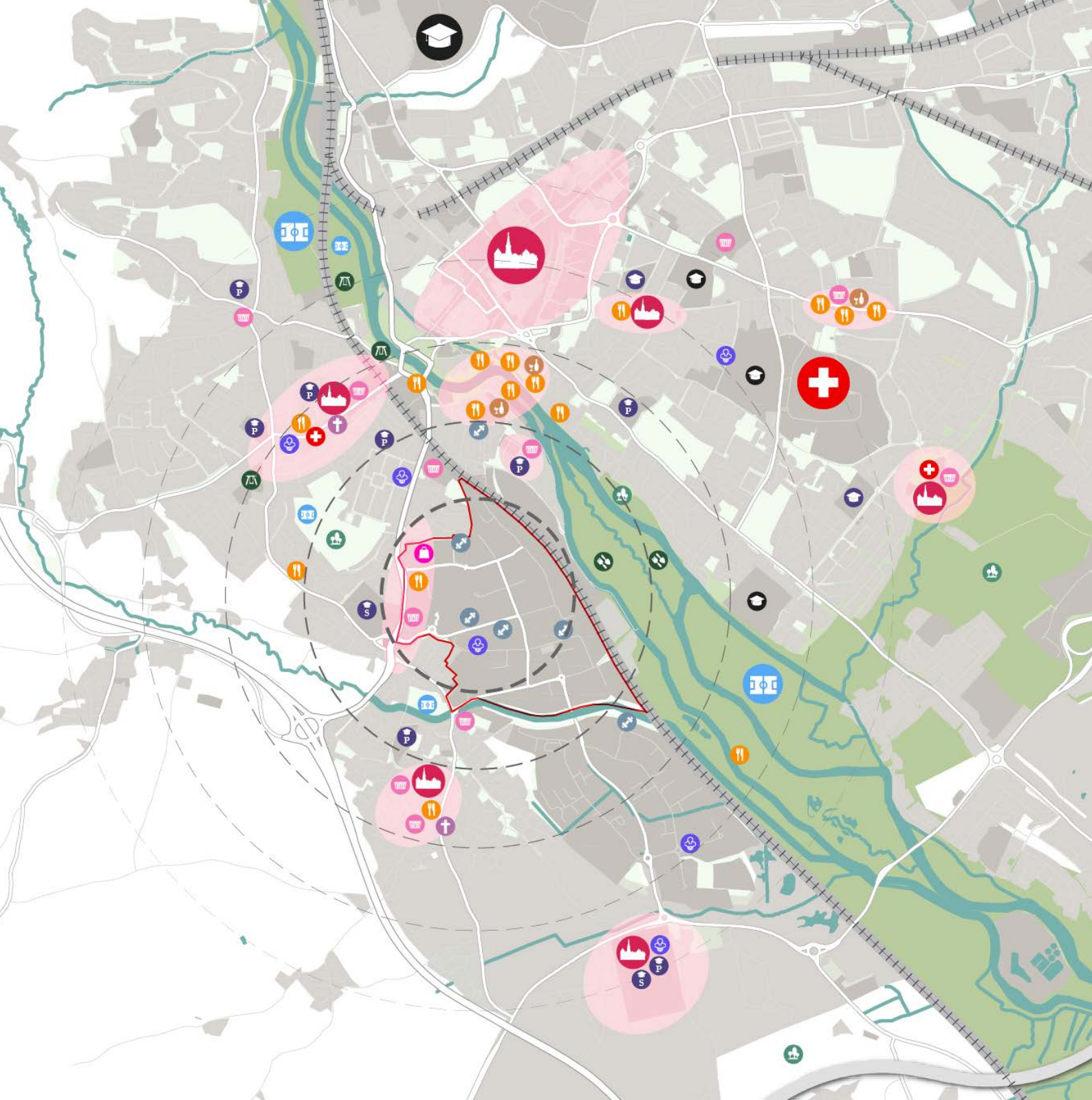
Although within walking distance to several neighbourhood centres and the city centre, Marsh Barton will need to deliver a significant amenity offer to attract potential new residents and help build a resilient community.

- * Exeter City Centre is approximately 2km (30 minute walk, 13 minute bike ride).
- * Nearest significant local centre is St Thomas and the Quayside.
- * Limited local amenities available on-site and what is there is geared towards lunchtime uses e.g. gyms.
- * Water Lane, to the north east of Marsh Barton, will provide a new local centre, including a primary school.
- * Emergence of an Alphington Rd Food and Beverage offer.

Key considerations

- * Strengthening the amenity and placemaking offer along the Alphington Rd corridor.
- * Ensure that new amenities are commensurate with the scale of new development and are delivered in advance/in tandem.





0m

1km

2km

-  City/local centre
-  Key mixed use areas
-  Higher education
-  Primary School
-  Secondary School
-  Place of worship
-  Retail
-  Supermarket
-  Drinking establishment
-  Restaurant
-  Hospital/ healthcare

-  Nursery
-  Play space
-  Key parks
-  Allotments
-  Sports and recreation

Landscape and open space

There are significant opportunities for redevelopment to provide a strong landscape framework for Marsh Barton which provides new habitat and recreational corridors and addresses the local shortfall in open space.

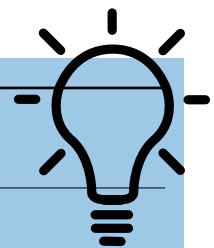
- * Adjacent to the Riverside Valley Park, a key citywide asset.
- * Lack of publically accessible

greenspace locally, including a lack of open space within Alphington.

- * Exe Estuary SPA located 1.5km away.
- * Alphin Brook located to the south which provides separation from Matford.
- * Little on-site vegetation and large quantities of impermeable surface.

Key considerations

- * The need to provide high quality open space to ease pressure on the Exe Estuary SPA and deliver biodiversity net gain.
- * Delivering open space and private gardens on contaminated land- potential emphasis on podium landscape space above retail uses.
- * Potential for glazed outdoor spaces to address potential noise concerns.
- * Potential for SuDS space set within linear parks to slow down discharge of water into sewers and provide attractive and biodiverse features.





-  Vegetated corridor
-  Woodland
-  Semi improved grassland
-  Coastal and floodplain grazing
-  SPA/SSSI
-  Watercourse
-  Play space
-  Key park
-  Allotment
-  Sports and recreation

Legibility and Urban Design

New mixed use development within Marsh Barton will need to go hand in hand with exceptional public realm that helps to better connect up surrounding neighbourhoods and to the estuary.

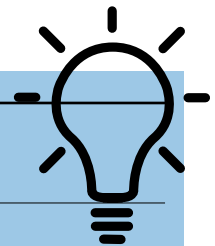
- * Generally poor arrival experience with traffic dominated junctions and cramped footways.
- * 3 constrained pedestrian arrival points along the east.
- * Streets arranged in a grid fragmenting

to the west where it meets residential-poor linkages into Marsh Barton.

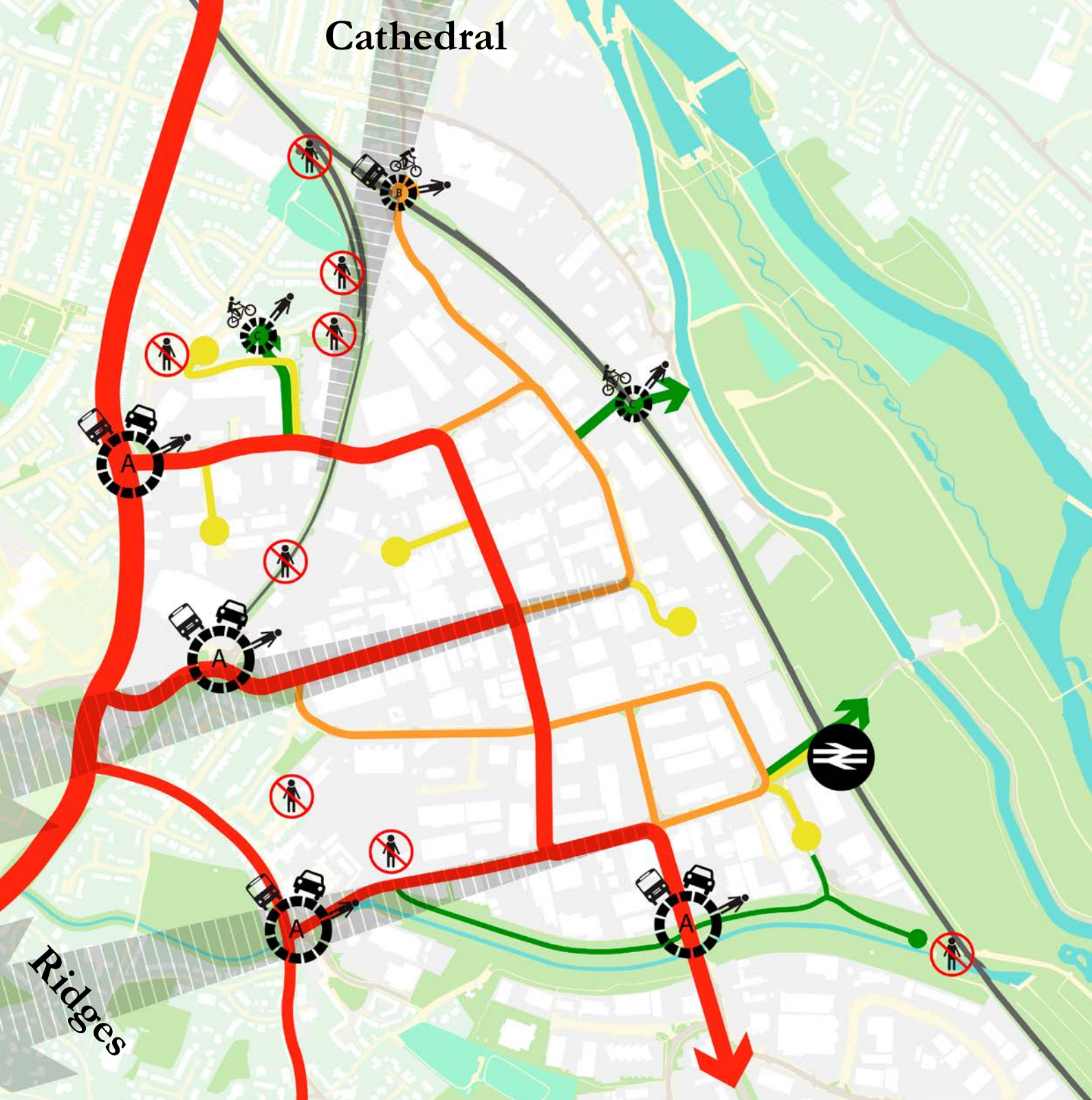
- * Wide street profiles dominated by highways and parking and limited tree planting.
- * Glimpsed views towards cathedral and western ridges.
- * Street hierarchy not expressed in street design- poor legibility.

Key considerations

- * Improve legibility and connections towards estuary and gateway entrances.
- * Rebalancing the streets to control traffic and provide safer routes and junctions for people.
- * Increased density and building heights need to express importance of key routes and places and provide a better sense of enclosure.



Cathedral



On

500m

1km

-  Primary street
-  Secondary street
-  Tertiary street
-  Pedestrian/cycle link
-  Marsh Barton railway station arrival
-  Severed link
-  Key long range view
-  Arrival- all modes
-  Arrival- Buses, pedestrians and bikes only
-  Arrival- pedestrians and bikes only

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Appendix B: Technical Constraints

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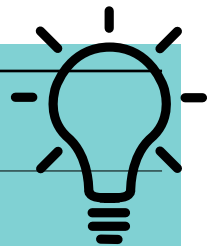
Technical Constraints

Utilities

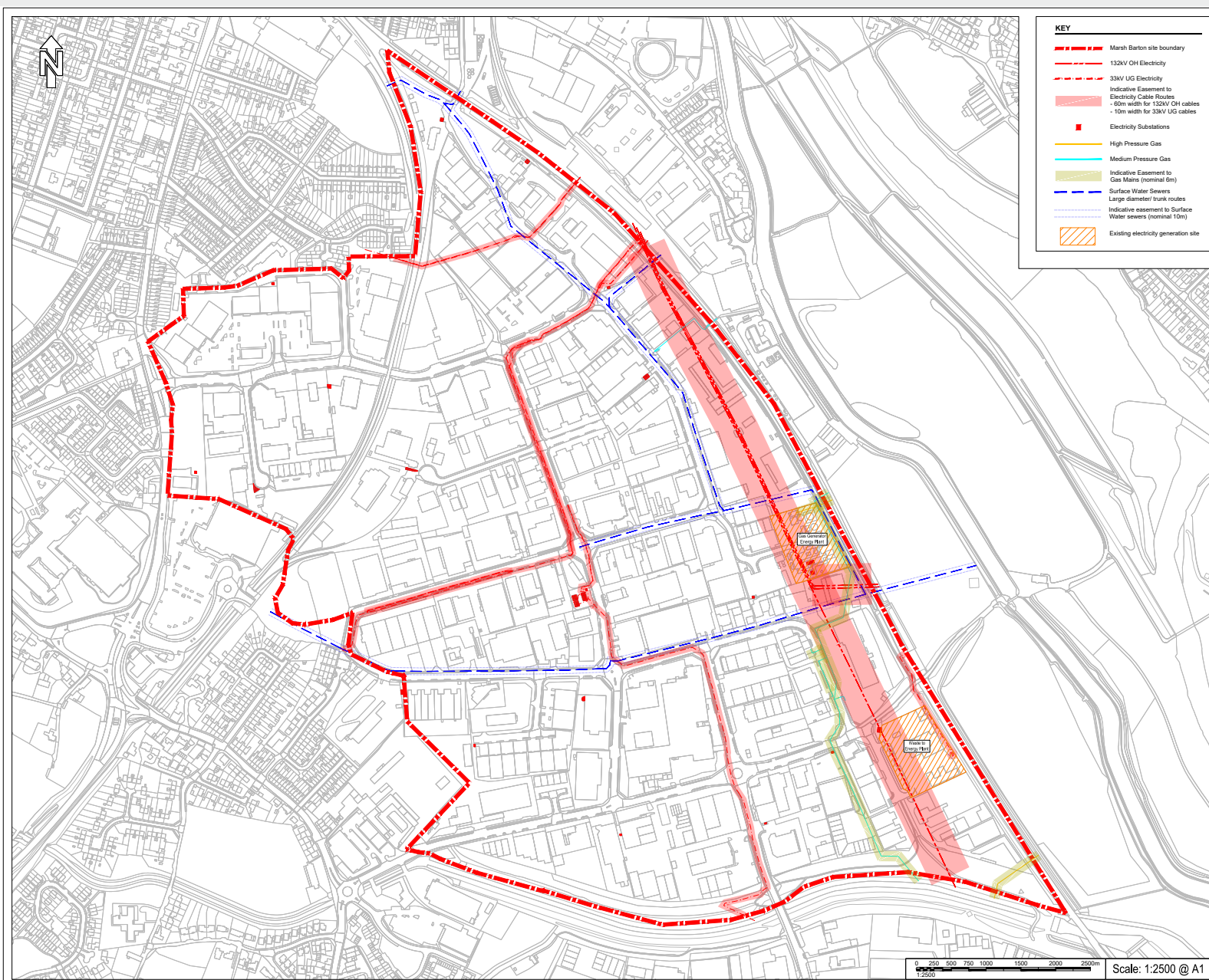
- * Strategic utilities predominantly within streets.
- * Overhead pylon corridor terminates in bulk supply point in Water Lane- 60m easement along eastern edge.
- * Various substations located through the development.

Key considerations

- * Retaining the grid of streets and leaving utility corridors in-situ where ever possible.
- * Impact of potentially raising levels on utilities.
- * Liaise with South West Water regarding capacity at WwTW
- * Development aspirations to understand demands for utilities, e.g. gas(?) district heating opportunities, electricity, EV charging, digital capabilities.



Existing Utilities Map



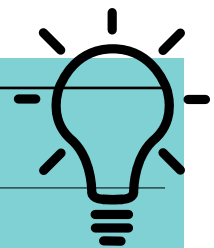
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Noise and Air Quality

- * The east and west boundaries of the site are directly adjacent to road and rail traffic noise sources and experience high levels of noise, although can be mitigated through good acoustic design principles.
- * Noise emissions from industrial areas likely to require consideration in the design of new residential development- cost implication.
- * 500m Waste Consultation Zone around Viridor plant that covers MB and Water Lane.
- * Other sources of noise on-site include scrapyards.

Key considerations

- * Relocation of scrapyards on-site to enable residential development.
- * Ensuring that residential dwellings can meet amenity noise standards through good acoustic design principles.



Legend

- Gas generator energy plant
- Substation
- Waste to energy plant

400 m

Contamination

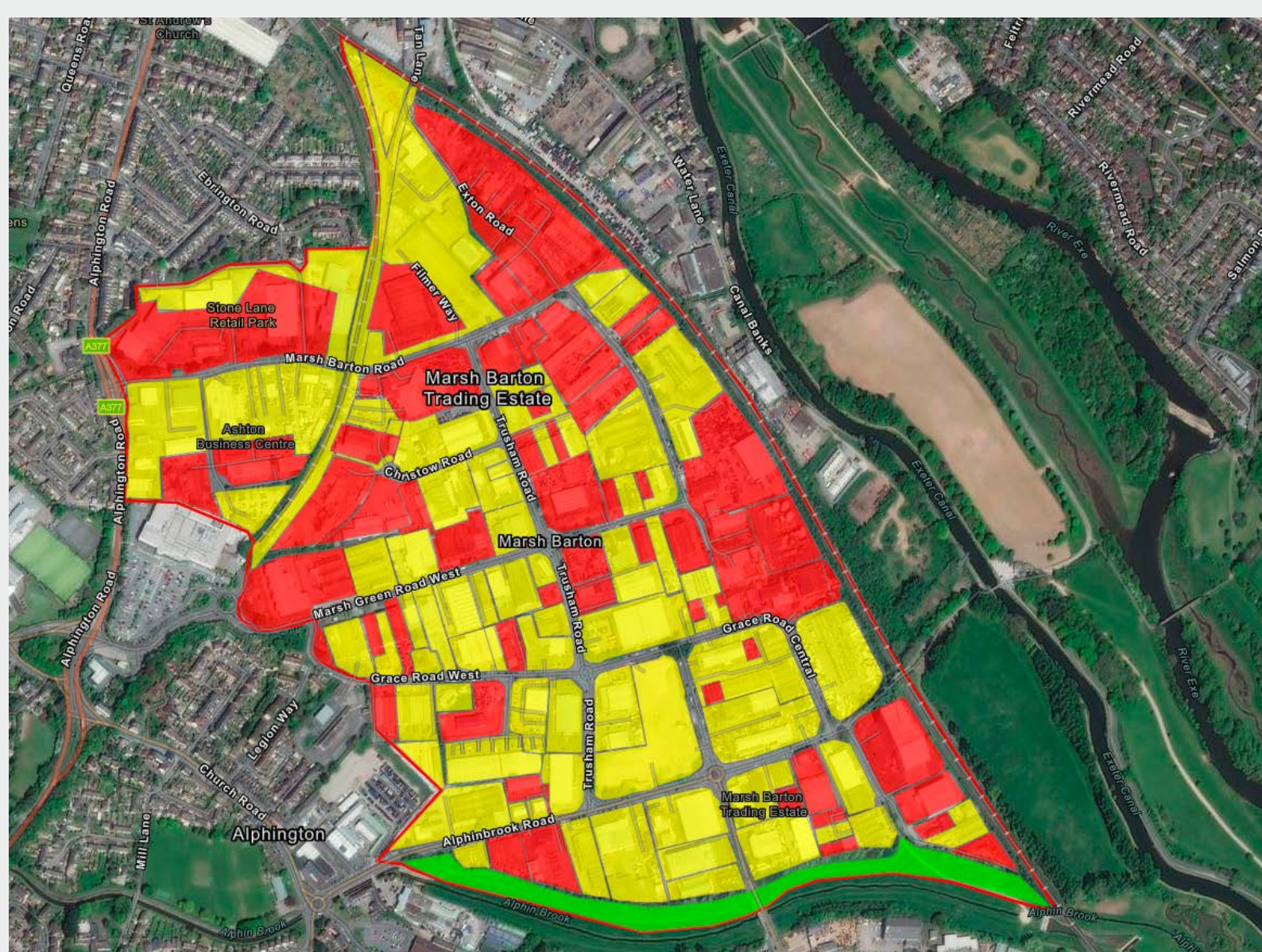
- * Green - low risk, will need some confirmatory sampling as there could be made ground / fill for the flood channel.
- * Amber - lower / more localised risk in terms of remediation but may have localised contam risk around any servicing areas.
- * Red - higher risk industries. Expectation of zoning to exclude gardens or require more extensive remediation.

Key considerations

- * Higher remediation cost implication for private gardens within red zones. Not an absolute constraint but needs to be considered.



Contamination Plan



Flood risk

- * The majority of the area lies in Flood Zone 3 and is therefore at high risk of flooding.
- * The detailed Marsh Barton Level 2 Strategic Flood Risk Assessment is available on the Council website:

https://exeter.gov.uk/media/xmilyiuk/evb-cc-13g_level-2-sfra-detailed-site-summary-marsh-barton-comp.pdf

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Appendix C: Land and Property

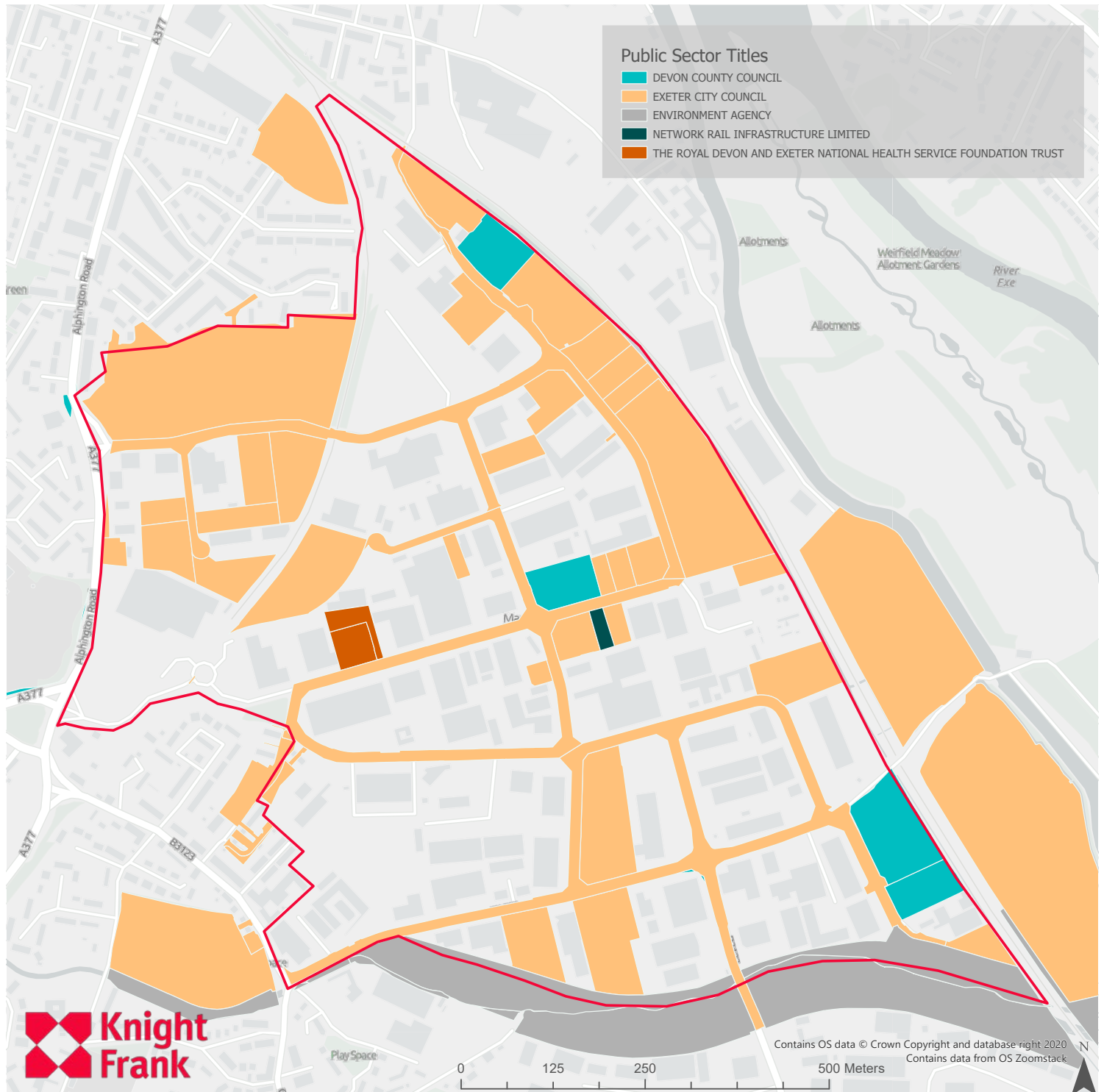
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Land and property

Public sector land

- * Consolidated public sector land on Exeter Retail park and to the immediate south.
- * Linear eastern tranche underneath the railway line-Pylon corridor.
- * Public sector land is generally piecemeal in other areas.
- * Public sector land east of railway currently functions as open space.
- * Disused railway that bisects the site is unregistered but understood to be owned by Network Rail and has potential for creative reuse.
- * Public sector land needs to be considered in tandem with leases to get a better sense of short-term potential (see next page).

Public Sector Ownership Map



Leases

- * The plan opposite shows lease expiry timescales based on land registry data.
- * Pockets of expiring leases to the south east of Sainsbury's and in the centre of the site where the building stock is old and has poor environmental performance.
- * Some expiring leases to the north around the Recycling centre.
- * Leases within Exeter Retail Park are typically 125-150 years, although some are for 999 years, with the majority of the leases (apart from 6 out of 48) having more than 100 years remaining.
- * Such long leases are effectively akin to a freehold so the negotiation to exit these leases could be time-consuming and costly.
- * Existing businesses may need to be relocated as a condition of terminating their lease. There is an additional cost to be considered and programme implications.

Leases Map



Vacant Premises

- * Limited number of vacant premises throughout the site (Based on ECC survey work previously undertaken)
- * Useful to integrate where possible to support wider opportunities.

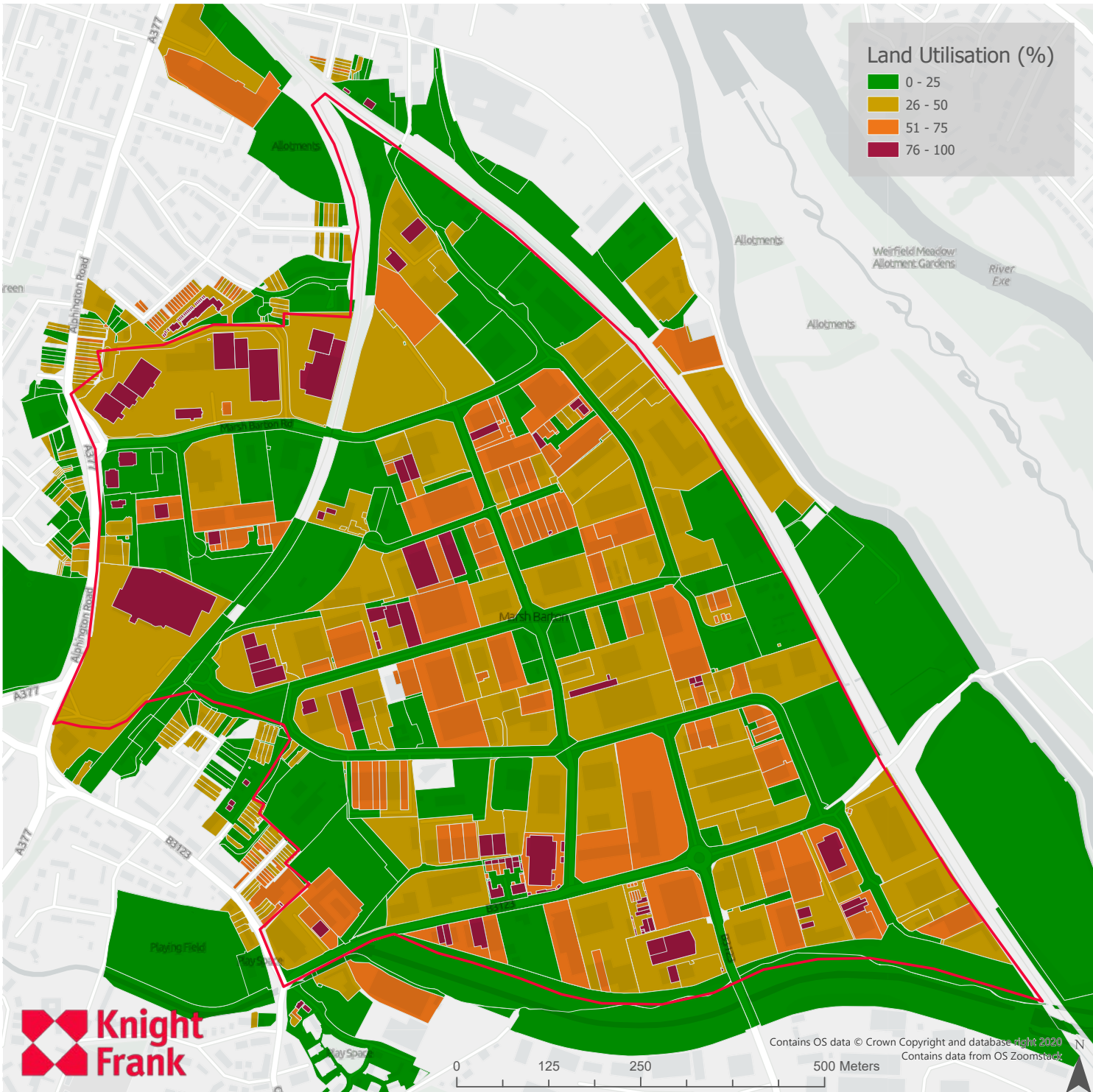
Vacant Premises Map



Underutilised Land

- * Measures the total plot area relative to the building footprint for each title.
- * Green denotes a lower land utilisation figure.
- * Low utilisation areas around the western edge of Marsh Barton, including the surface car park behind Baker's Yard and HGV test centre.
- * Other low intensity area in the north and eastern edge correspond with the recycling centre and the gas energy plant.

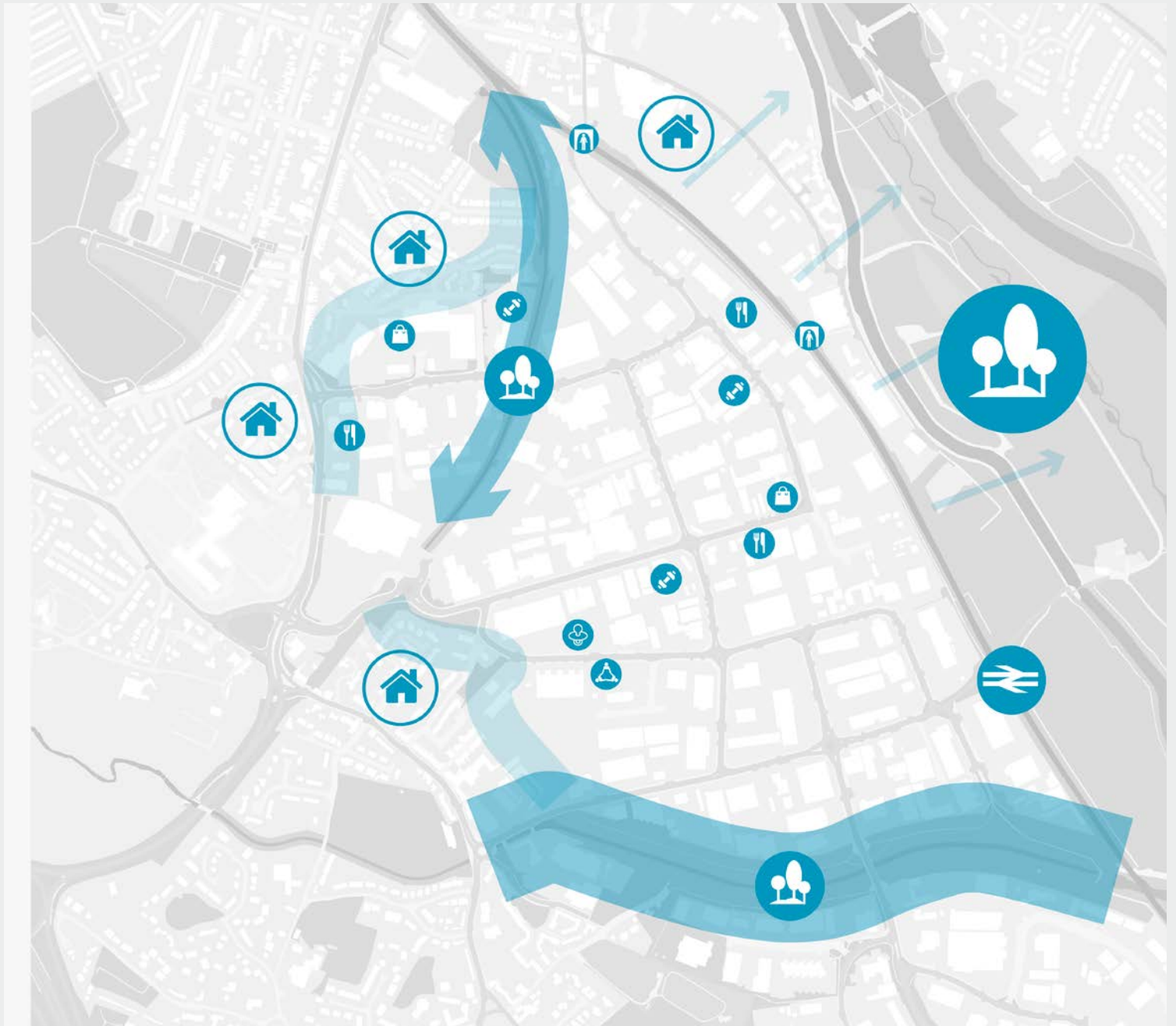
Underutilised Land Map



Land uses/features compatible with mixed use placemaking

- * Water Lane build out- capitalise on adjacency and connection to estuary.
- * Alphington Rd edge- existing residential edge and linkages to St Thomas.
- * Alphin Brook- an existing watercourse that defines the southern extent of Marsh Barton with room for enhancement.
- * Station is a huge asset for the site, although is currently adjacent to power generating uses.

Positive Land uses/features Map



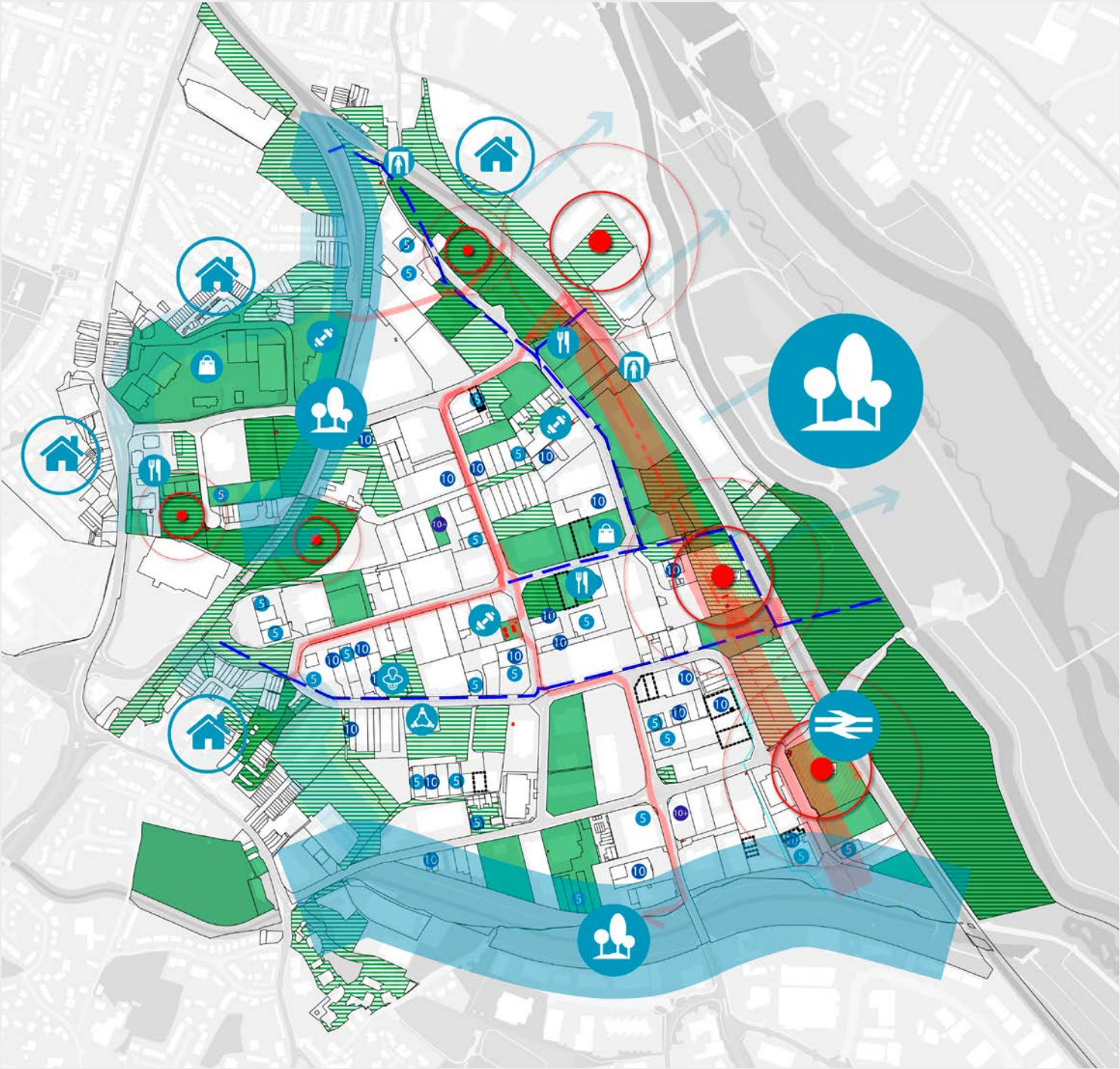
Land Use Summary

- * A challenging picture overall in terms of constraint free, consolidated public sector land.
- * In the centre of the site, ownership is fine grained and predominantly private.
- * The eastern edge of the site contains public sector land. However the pylon easement effectively sterilises the area for residential development.
- * Other areas of land are not under public sector (ECC) control, so a complex land assembly exercise would be required.

Legend

	Public sector land
	Underutilised land
	Noise emitters
	Large diameter surface water mains
	60m pylon offset
	Indicative easement to electricity cable routes
	Indicative easement to gas main
	Substations
	Vacant premises
	Leases with under 5 years left
	Leases with under 10 years left
	Leases with over 10 years left
	Land registry parcels

Constraints and Opportunities Map



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