

HARDISTY•JONES

# Employment Supply in Greater Exeter

Prepared for Exeter City Council

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# 1 Introduction

- 1.1 This paper considers employment land supply data set out in the Greater Exeter EDNA and more recent data.

## 2 EDNA Assessment of Supply

- 2.1 The Economic Development Needs Assessment (EDNA) included an assessment of the supply of potential employment sites across Greater Exeter, carried out by JLL. This identifies 229 ha of “*employment land that is consented, allocated, or could be brought forward for development*” (para. xix). Of this, 162 ha was RAG-rated as green (i.e. likely to be delivered), 65 ha was RAG-rated amber (i.e. some barriers to delivery), and only 2 ha was RAG-rated red (i.e. unlikely to be delivered).
- 2.2 The EDNA notes that: *Some sites are allocated/suitable for industrial development; some sites are allocated/suitable for office development; and four sites (comprising 51 ha) are suitable for both. Of the total supply of 229 ha, up to 77 ha of this could be developed for offices, and up to 202 ha of this could be developed for industrial* (EDNA, para. xxi).
- 2.3 The EDNA showed a total potential supply of 12 ha in the City of Exeter.

**Figure 2.1: Supply of Employment Land (ha)**

|                                                         | East Devon | Exeter | Mid Devon | Teignbridge |
|---------------------------------------------------------|------------|--------|-----------|-------------|
| Total Supply                                            | 106        | 12     | 50        | 61          |
| <b>Land Suitable for Office and R&amp;D Development</b> |            |        |           |             |
| Offices Supply                                          | Up to 41   | 4      | 6         | Up to 26    |
| Supply - RAG Rating Green                               | Up to 41   | 2      | 1         | Up to 2     |
| Supply – RAG Rating Green or Amber                      | Up to 41   | 2      | 6         | Up to 26    |
| <b>Land Suitable for Industrial Development</b>         |            |        |           |             |
| Industrial Supply                                       | Up to 90   | 7      | 44        | Up to 61    |
| Supply - RAG Rating Green                               | Up to 64   | 7      | 41        | Up to 29    |
| Supply – RAG Rating Green or Amber                      | Up to 90   | 7      | 44        | Up to 61    |

Source: Greater Exeter EDNA Figures 7.4, 7.5, and 7.6

### 3 Updated Data on Supply

3.1 More recent data on supply shows a different picture to that set out in the EDNA. No new data has been published for Mid Devon.

#### East Devon

3.2 The Regulation 19 Publication Draft East Devon Local Plan (February 2025)<sup>1</sup> sets out the provision of 178 ha of employment land (Strategic Policy SP04), comprising:

- Sites allocated in the Draft Local Plan (not at new communities) – 90.7 ha – set out at para. 3.27 of the document.
- Sites at Cranbrook – 19.2 ha.
- Sites at a second new community (up to 2042) – around 17.5 ha.
- Sites built 2020-2024 – 6.8 ha.
- Sites with planning permission or under construction at 2024 – 44 ha.
- Additional windfall sites are expected to come forward.

3.3 The total supply of land is now significantly higher than the 106 ha of employment land considered by JLL in the EDNA.

3.4 The supply of 178 has when compared to a stated need for 80 ha (Strategic Policy SP04), suggests a significant over-supply of employment land in East Devon.

#### Exeter

3.5 The Publication Draft Local Plan includes three allocations of employment land with a total of 15.5 ha across three sites – Land Adjacent to Sandy Park, Newcourt (7 ha), Land Adjacent to Ikea, Newcourt (4 ha) and St Luke's Campus (4.5 ha). Within the publication Draft Local Plan these are specifically for the transformational sectors, However, a potential modification to the Local Plan would make this less restrictive.

3.6 Of the three, Newcourt was considered in the Greater Exeter EDNA supply review. Two sites were reviewed, Newcourt A and B. Newcourt A was a 1.82 ha site, suitable for offices, but RAG-rated red (i.e. unlikely to be delivered). The EDNA notes that a planning application for housing had been submitted for this site. Newcourt B was a 4.64 ha site, suitable for industrial, and RAG-rated green (i.e. likely to be delivered).

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<sup>1</sup> <https://eastdevon.gov.uk/media/gtimzhle/regulation-19-plan.pdf>

- 3.7 The EDNA review included a further seven potential employment sites, with a cumulative 5.25 ha of employment land, all RAG-rated green and amber. None is mentioned in the Publication Draft Local Plan. Of this land, 2.39 ha was suitable for offices and 2.85 ha was suitable for industrial.
- 3.8 If the 5.25 ha of sites identified in the EDNA (excluding Newcourt sites) are still available, together with the 15.5 ha of new allocations, this suggests a supply of 20.75 ha of employment land.
- 3.9 The strategic mixed-use brownfield sites are proposed to retain their current amount of employment floorspace, although the nature of this space and density of employment could change, as only space in Use Class E(g) is compatible with residential-led mixed-use redevelopment.

## Teignbridge

- 3.10 Teignbridge District Council's response to the Inspector's matters, issues, and questions<sup>2</sup> (September 2024) states a need for 65 ha of employment land over the plan period.
- 3.11 Table 9 in the response (page 29) sets out the supply of employment land, comprising 31.6 ha of extant Local Plan allocations and a further 68.3 ha of Submission Local Plan allocations, giving a total supply of 99.9 ha (c100ha). The total supply of land is now significantly higher than the 61 ha of employment land considered by JLL in the EDNA.
- 3.12 The supply of 100ha when compared to a stated need for 65 ha, suggests a significant over-supply of employment land in Teignbridge.

## Greater Exeter

- 3.13 Together, the latest data set out above, suggests a significantly larger supply of potential employment than was identified in the EDNA – a total of 349 ha compared to the 229 ha reviewed in the EDNA. Most of the newly identified supply is in East Devon and Teignbridge.

**Figure 3.1: EDNA and Latest Estimate of Supply of Employment Land**

|                           | East Devon | Exeter | Mid Devon | Teignbridge |
|---------------------------|------------|--------|-----------|-------------|
| EDNA Supply               | 106        | 12     | 50        | 61          |
| Latest Estimate of Supply | 178        | 20.75  | 50        | 99.9        |

<sup>2</sup> <https://www.teignbridge.gov.uk/media/vbrpqy0e/cs3-matter-3-overall-scale-of-housing-and-employment-growth.pdf>

## 4 Comparing Need and Supply

### City of Exeter

- 4.1 The latest data set out above (see paragraphs 3.5 to 3.9) shows the City Exeter has an identified supply of just under 21 ha of employment land including new allocations. The City has a tight boundary and needs to meet significant housing need as well as accommodate economic growth.
- 4.2 To meet the City's economic growth potential will require around 71 ha of employment land, including 50 ha for Use Classes B2 and B8. This cannot all be provided within the City's boundary. There is an established trend of economic growth generated by the City taking place in adjoining local authority areas that are functionally part of the City's economy, within a wider FEMA, and this will need to continue.
- 4.3 Therefore, some of the future employment generated by the growth of Exeter's economy will need to take place on sites adjacent to the City, within other local authority areas which are part of the Greater Exeter FEMA.

### Greater Exeter

- 4.4 At the Greater Exeter level (which is considered as a coherent FEMA), the EDNA identified a total need for between 251 ha and 258 ha (within a wider range of 218 ha to 294 ha) over the period from 2020 to 2040.
- 4.5 When the EDNA was prepared, a total supply of 229 ha of supply was identified, and 227 ha of this was RAG-rated green or amber (likely to be delivered or some barriers to delivery), with only 2 ha unlikely to be delivered. This suggested a shortfall in the supply of sites to meet the forecasted need.
- 4.6 The latest assessment of supply suggests there is 349 ha of employment land in Greater Exeter. This shows there should be sufficient supply to meet the forecast need within the FEMA.



# HARDISTY•JONES

## BRISTOL

27 Trenchard Street,  
Bristol, BS1 5AN

01172 355 075

## CARDIFF

10th Floor, Brunel House  
2 Fitzalan Rd, Cardiff, CF24 0EB

02921 508 950

[contact@hardistyjones.com](mailto:contact@hardistyjones.com)