

Stock and pipeline data report

Grow-on Space in South Essex

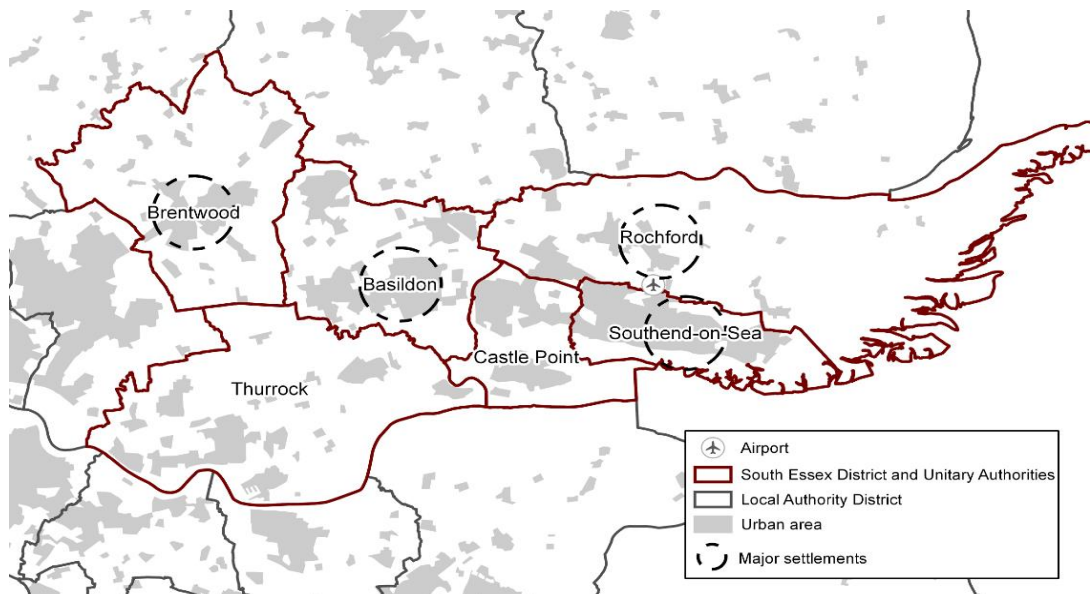
Apr-19

SQW

1 Introduction

- 1.1 This report presents analysis carried out by SQW of the VOA ratings list as at 1 April 2017, records from EGi's planning applications database as at 7 May 2019, and pre-let availability from the EGi and CoStar databases in June 2019.
- 1.2 The geographic area used was the Associated South Essex Local Authorities (ASELA) area, comprising the Basildon, Brentwood, Castle Point, Rochford, Southend-on-Sea and Thurrock local authority areas.

Study area

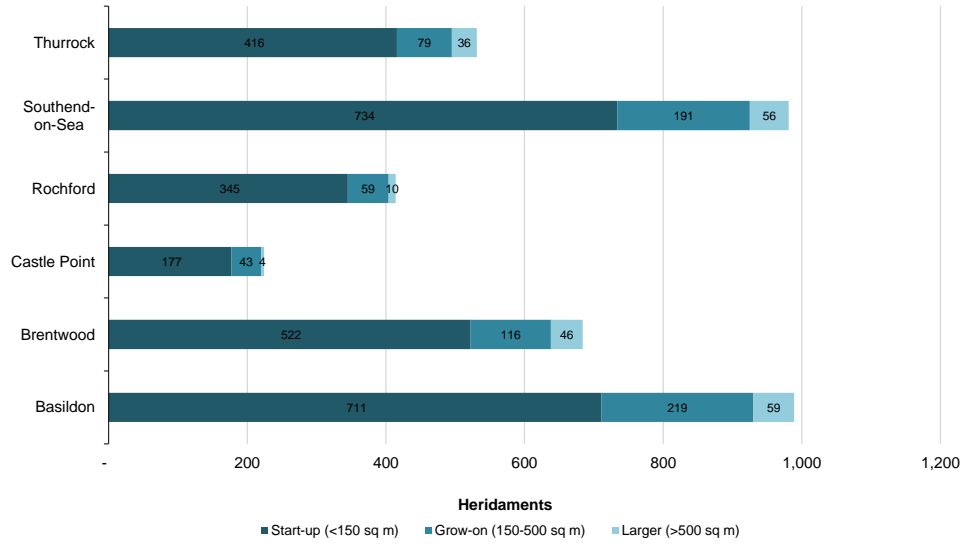


- 1.3 Three main types of analysis have been performed:
- For relevant VOA categories, total of hereditaments and floorspace by size of hereditament and Billing Authority
 - Consolidating the known stock of Managed Workspace, based on a methodical internet search and consultations with planning and economic development officers
 - Consolidating the known pipeline of Start-up / Grow-on Space projects, based on the EGi planning applications database, pre-let availability from the EGi and CoStar databases, consultations with planning and economic development officers
- 1.4 The rest of the report is structured in four sections:
- Section 2. Stock - Offices
 - Section 3. Stock - General Industrial
 - Section 4. Stock - Storage and Distribution
 - Section 5. Stock - Managed workspace
 - Section 6. Stock - Grow-on Space
 - Section 7. Pipeline - Start-up / Grow-on Space
- 1.5 The report is not intended to be used on its own; findings and conclusions are provided in our main reports / presentations.

2 Stock - Offices

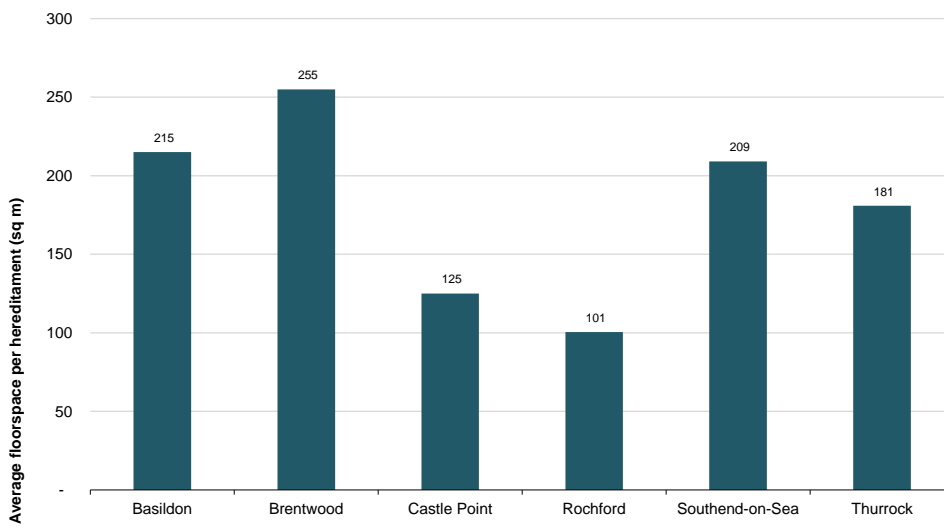
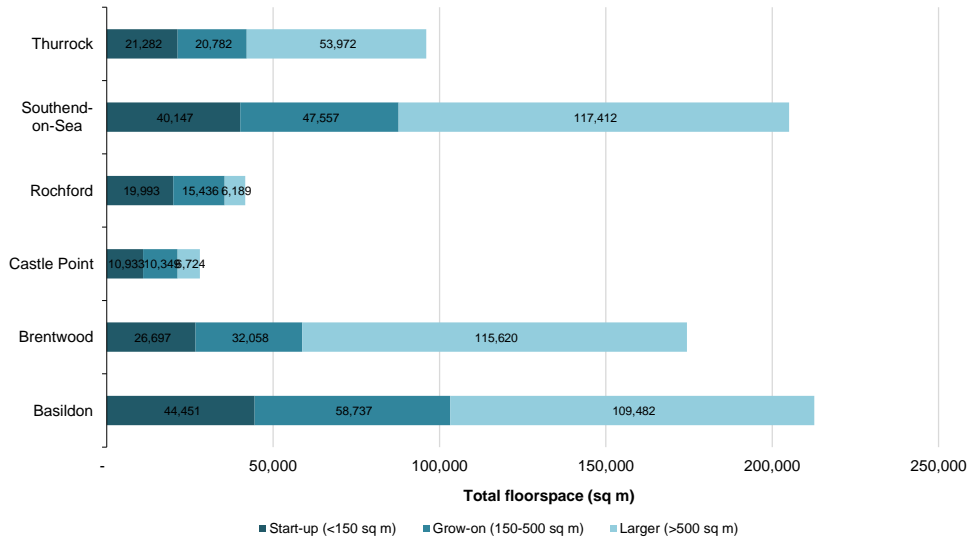
Hereditaments

Billing authority	Start-up (<150 sq m)	Grow-on (150-500 sq m)	Larger (>500 sq m)	Total hereditaments
Basildon	711	219	59	989
Brentwood	522	116	46	684
Castle Point	177	43	4	224
Rochford	345	59	10	414
Southend-on-Sea	734	191	56	981
Thurrock	416	79	36	531
Total	2,905	707	211	3,823



Floorspace (sq m)

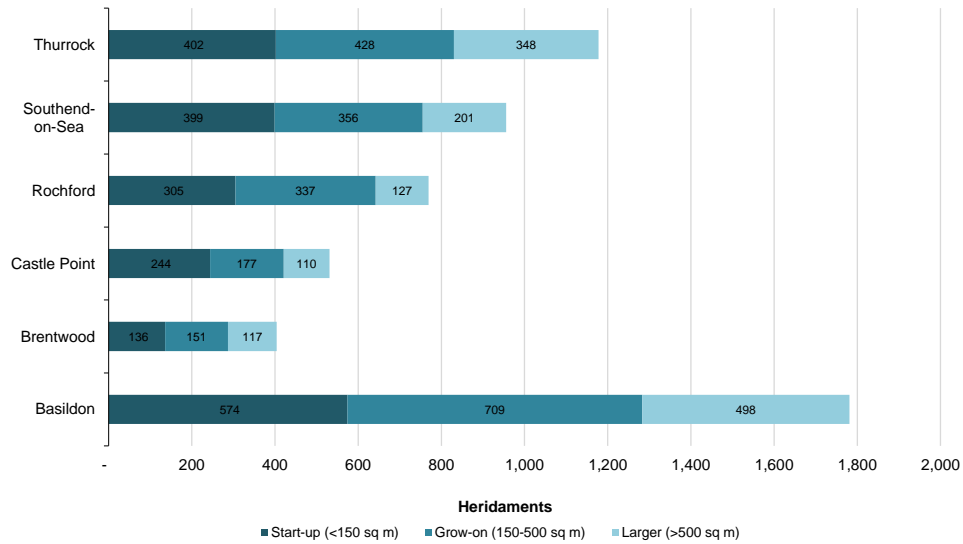
Billing authority	Start-up (<150 sq m)	Grow-on (150-500 sq m)	Larger (>500 sq m)	Total floorspace (sq m)	Average floorspace per hereditament (sq m)
Basildon	44,451	58,737	109,482	212,670	215
Brentwood	26,697	32,058	115,620	174,375	255
Castle Point	10,933	10,349	6,724	28,007	125
Rochford	19,993	15,436	6,189	41,618	101
Southend-on-Sea	40,147	47,557	117,412	205,116	209
Thurrock	21,282	20,782	53,972	96,036	181
Total	163,504	184,918	409,400	-	



3 Stock - General Industrial

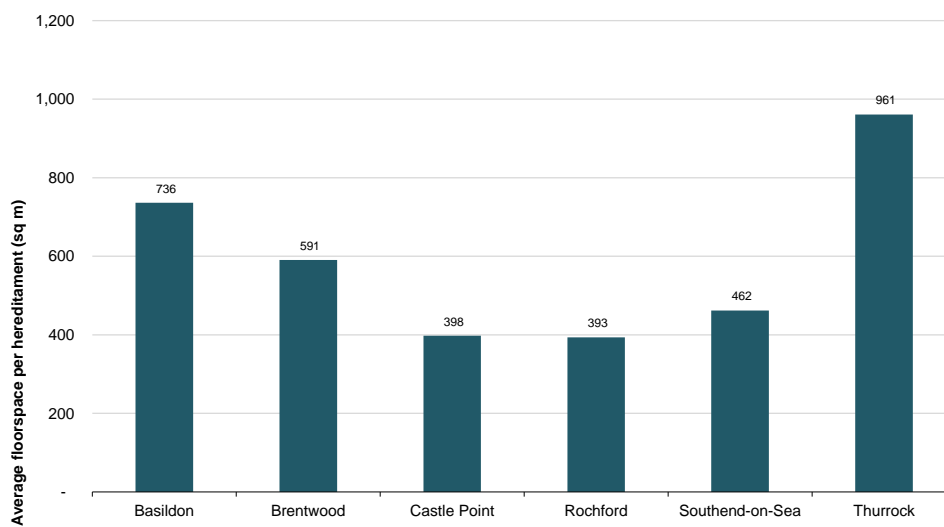
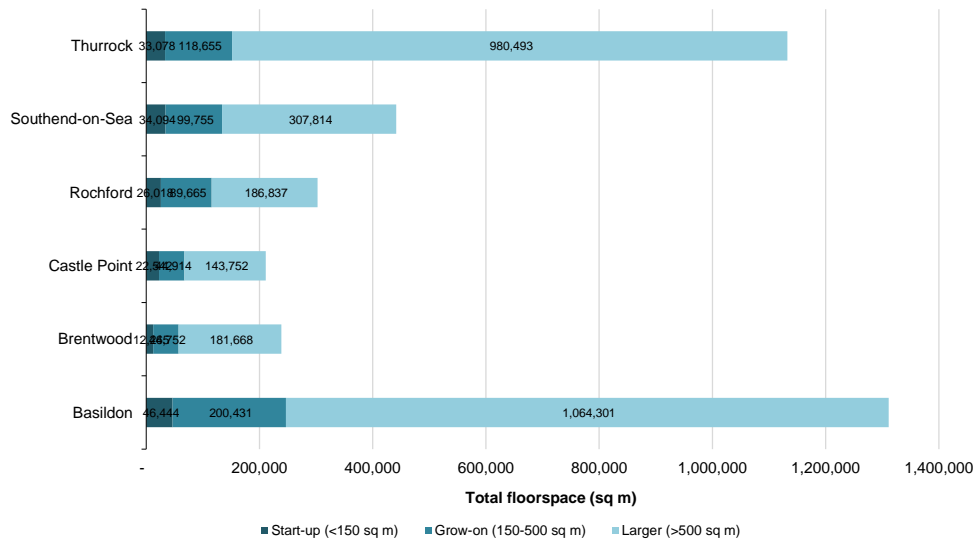
Hereditaments

Billing authority	Start-up (<150 sq m)	Grow-on (150-500 sq m)	Larger (>500 sq m)	Total hereditaments
Basildon	574	709	498	1,781
Brentwood	136	151	117	404
Castle Point	244	177	110	531
Rochford	305	337	127	769
Southend-on-Sea	399	356	201	956
Thurrock	402	428	348	1,178
Total	2,060	2,158	1,401	5,619



Floorspace (sq m)

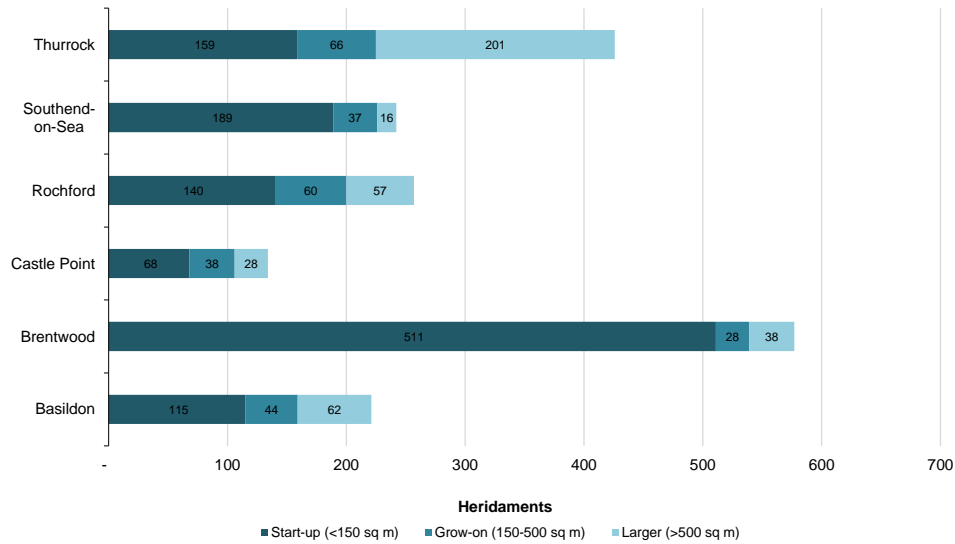
Billing authority	Start-up (<150 sq m)	Grow-on (150-500 sq m)	Larger (>500 sq m)	Total floorspace (sq m)	Average floorspace per hereditament (sq m)
Basildon	46,444	200,431	1,064,301	1,311,176	736
Brentwood	12,265	44,752	181,668	238,685	591
Castle Point	22,542	44,914	143,752	211,208	398
Rochford	26,018	89,665	186,837	302,520	393
Southend-on-Sea	34,094	99,755	307,814	441,664	462
Thurrock	33,078	118,655	980,493	1,132,226	961
Total	174,441	598,172	2,864,865	3,637,478	



4 Stock - Storage and Distribution

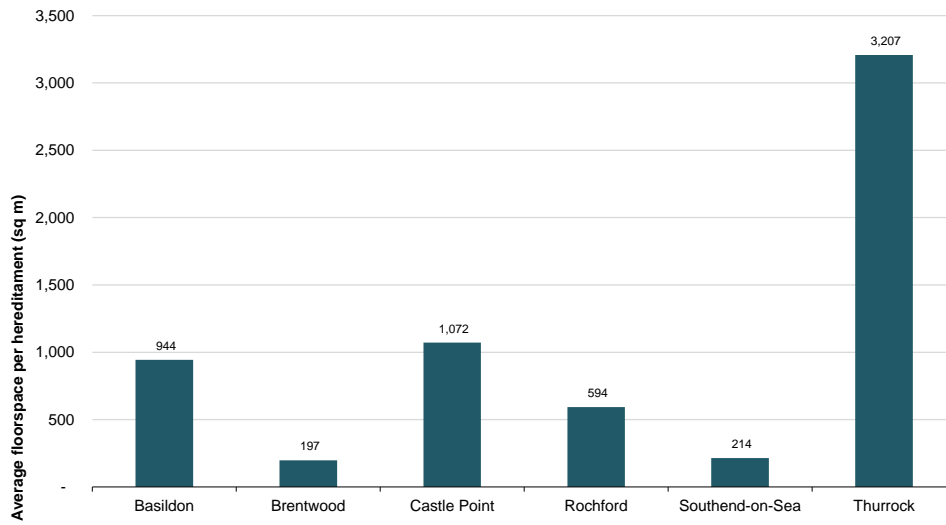
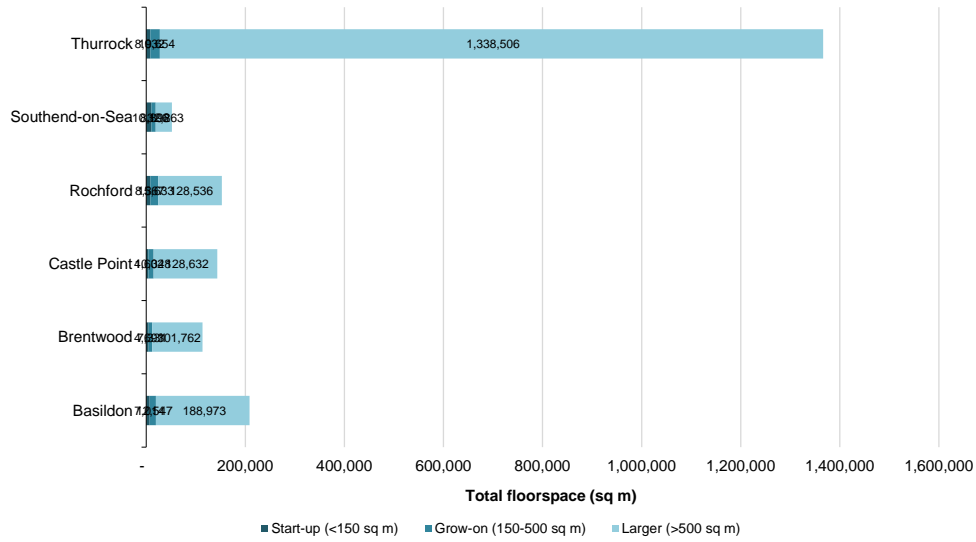
Hereditaments

Billing authority	Start-up (<150 sq m)	Grow-on (150-500 sq m)	Larger (>500 sq m)	Total hereditaments
Basildon	115	44	62	221
Brentwood	511	28	38	577
Castle Point	68	38	28	134
Rochford	140	60	57	257
Southend-on-Sea	189	37	16	242
Thurrock	159	66	201	426
Total	1,182	273	402	1,857



Floorspace (sq m)

Billing authority	Start-up (<150 sq m)	Grow-on (150-500 sq m)	Larger (>500 sq m)	Total floorspace (sq m)	Average floorspace per hereditament (sq m)
Basildon	7,014	12,547	188,973	208,534	944
Brentwood	4,693	7,331	101,762	113,786	197
Castle Point	4,602	10,348	128,632	143,582	1,072
Rochford	8,367	15,633	128,536	152,536	594
Southend-on-Sea	10,106	8,892	32,863	51,861	214
Thurrock	8,032	19,654	1,338,506	1,366,192	3,207
Total	42,814	74,405	1,919,272	-	-



5 Stock - Managed workspace

Name	Local authority	Location	Grow-on space?	Postcode	Date established / refurbished / extended / Delivery / operating model	Total area (sq m)	Accommodation (number of units, min / max unit size sq m)	Current availability	Sectoral focus (formal / informal), entry requirements	Type(s) of workspace	License terms (min. term, notice period)	Typical license fees (Epa, inclusions / exclusions)	Support services offered	Web address
(In House Office) Cranes Farm Road, Basildon, Essex, SS14	Basildon	Basildon	No	SS14 3JJ	n/a Private (commercial)	192	120 sq ft to 550 sq ft offices	n/a	n/a	All office	6 - 12 month license	£140 to £500 per week, inclusive of business rates, electric and water.	n/a	https://www.inhouseoffice.co.uk/
Barleylands	Basildon	Billericay	Yes	CM11 2UD	n/a Private (commercial)	2,984	n/a	n/a	n/a	Studio, large number of different sized offices, industrial units	n/a	n/a	n/a	https://www.barleylands.co.uk/venue-hire/commercial-hire/
Basildon Creatorspace, The Basildon Centre (Basildon library)	Basildon	Basildon	n/a	SS14 1EE	n/a Local authority / private partnership (social enterprise)	n/a	n/a	n/a	Technology	Co-working space (for up to 12)	n/a	n/a	n/a	https://www.craftscouncil.org.uk/listings/makeshift-do-at-basildon-library/
Basildon Studios	Basildon	Basildon	No	SS14 3FT	n/a Private (commercial)	n/a	n/a	n/a	Music	Studios / rehearsal rooms	n/a	£30 ph or 180 pd for studios; £10 ph for rehearsal rooms	Studio Technicians	http://www.basildonstudios.co.uk/recording-studio/
Cornwallis Business Centre, Basildon	Basildon	Basildon	No	SS14 3BB	n/a Private (commercial)	2,027	47 units - mainly offices 10 sqm - 139 sqm	Workshop Units on Ground Floor – 500 sq.ft. Office or Retail Units on	None	Office, training / meeting rooms	Rent, Short or Long Term Lease options	n/a - The monthly license fee is inclusive of rent, rates, heating, lighting, power and support services.	n/a	http://www.cornwallisbusinesscentre.co.uk/services-offices-retail-units-
San-Marie Studios	Basildon	Billericay	n/a	CM11 2PZ	n/a Private (commercial)	n/a	3 Studios	n/a	Fitness	Studio	Hourly	Studio 1 £15.00 per hour (£12.50 +VAT); Studio 2 £7.50 per hour; Studio 3 £12.00 per hour; Complete Venue £30.00 per hour (£25.00 +Vat)	none	http://san-marie.co.uk/Studio%20Hire%20Agreement.pdf
Stockplace commercial, Phoenix Business Park, Basildon	Basildon	Phoenix Business Park, Basildon	Yes	SS14 3EZ	n/a Private (commercial)	9,290	500 sq ft to 10,000 sq ft offices, Meeting room	700 sq ft	none	Mostly offices, a breakout space and a meeting room	n/a	n/a	n/a	http://stockplace.co.uk/commercial/
The Basildon Enterprise Centre, Basildon	Basildon	Basildon	No	SS13 1LT	n/a Private (commercial)	1,069	n/a	n/a	n/a	Offices	n/a	n/a	n/a	https://www.investessex.co.uk/
The Old Rectory	Basildon	Basildon	No	SS13 2HG	n/a Private (commercial)	370	20 small office units	10 units	none	Managed offices	n/a	n/a	none	http://theoldrectory.uk.com/rooms/
Your Virtual Office Ltd	Basildon	Basildon	No	SS15 4DB	n/a Private (commercial)	n/a	n/a	n/a	None	n/a	Registered address and mail forwarding: six months /12 months	n/a	n/a	http://yvolimited.co.uk/telephone-answering-service/
CREATE Business Hub	Brentwood	Brentwood	No	CM14 4DR	n/a n/a	1,080	Total 1,045 sq m office; 37 sq m warehouse	n/a	n/a	Almost all office	n/a	Private office up to 11 desks @ £300-375pcm; fixed desk from £250pcm; hot desk from £175pcm	n/a	https://www.createbusinesshub.co.uk/
Regus - Brentwood, Great Warley (Jubilee House)	Brentwood	Great Warley	n/a	CM13 3FR	n/a Private (commercial)	114	n/a	n/a	n/a	Office, meeting room, co-working, business lounge	n/a	Offices From £6.70 per day; Co-working From £5.70 per day; Virtual Office From £2.20 per day	n/a	https://www.regus.co.uk/locations/united-kingdom/brentwood/brentwood
Stocks Studio	Castle Point	Canvey Island	No	SS8 0PU	n/a Private (commercial)	1,852	n/a	n/a	Entertainment	Studio	n/a	n/a	none	https://www.starstudiosofperformingarts.co.uk/studio/
Crouchmans Yard	Rochford	Great Wakering	No	SS3 9TS	n/a Private (commercial)	592	13 units (250 sq ft to 1,000 sq ft)	n/a	none	All office	n/a	From £1 / sq ft	n/a	https://www.crouchmansyard.co.uk/about-crouchmans-yard-offices-
Mega Centre	Rochford	Rayleigh	n/a	SS6 7UT	n/a Private (commercial)	23	One rehearsal room	n/a	Music	Rehearsal room	Hourly	£12 – 1hr, £20 – 2hrs, £27.50 – 3hrs, £36.00 – 4hrs	none	http://www.megacentrerayleigh.co.uk/music-practice-rooms/
No Recording Studio	Rochford	Rayleigh	n/a	SS6 9QG	n/a Private (commercial)	98	n/a	n/a	Music	Large live room, vocal booth, control room	Hourly	Day Rate (8-10 hours) - £175; Hourly Rate - £35	none	http://www.norecording.co.uk/recording.html
Business Incubation Centre	Southend-on-Sea	Southend-on-Sea	n/a	SS1 1LW	n/a University of Essex	n/a	n/a	n/a	n/a	Mostly offices, meeting rooms	n/a	n/a	n/a	https://www.essex.ac.uk/business/business-incubation-centre-
Create 98	Southend-on-Sea	Leigh-on-Sea	No	SS9 1AB	n/a Private (commercial)	70	Two studios (studio one - n/a 400 sq ft, studio two - 300 sq ft)	n/a	Arts and creative	Office studios	You can only hire if you are listed as a tutor in their system and will	n/a	n/a	https://create98.co.uk/studio-2/
Laurence Industrial Estate	Southend-on-Sea	Southend-on-Sea	Yes	SS2 6RH	n/a Private (commercial)	5,407	40 units	n/a	n/a	Warehouse, industrial, workshops	n/a	n/a	n/a	https://www.capitalspace.co.uk/Southend/Laurence-Industrial-Estate
One Hub Southend	Southend-on-Sea	Southend-on-Sea	n/a	SS1 2JY	n/a Private (commercial)	586	n/a	n/a	n/a	Mostly offices, meeting rooms	Month-to-month membership plans that can be tailored to client	Meeting rooms - £10 ph; Hot Desking - £25 pd; Silver Hot Desk - £99 pcm; Gold Perm Desk - £239 pcm	Free monthly networking events / Access to monthly business growth	https://www.onehubsouthend.co.uk/features/
Seedbed Business Centre, Shoeburyness	Southend-on-Sea	Shoeburyness	Yes	SS3 9QY	n/a Private (commercial)	2,788	45 (90 sq.ft. to 1500 sq.ft)	n/a	n/a	Offices, meeting rooms	n/a	n/a	n/a	https://www.southendseedbed.co.uk/virtual-office.html
Space282, Leigh on Sea	Southend-on-Sea	Leigh-on-Sea	n/a	SS9 1BW	n/a Private (commercial)	165	n/a	n/a	none	Mostly offices	n/a	Dedicated desk - £295 pcm / Private office - £395 pcm / Hot desking - £45 pcm / Day pass - £20 pd	Networking events / training courses website formation, social media	https://www.space282.co.uk/leigh-on-sea
Space282, Southend on Sea	Southend-on-Sea	Southend-on-Sea	n/a	SS1 1EF	n/a Private (commercial)	167	n/a	n/a	none	Mostly offices	n/a	Dedicated desk - £295 pcm / Private office - £395 pcm / Hot desking - £45 pcm / Day pass - £20 pd	Networking events / training courses website formation, social media	https://www.space282.co.uk/southendonseas
The Hive Enterprise Centre	Southend-on-Sea	Southend-on-Sea	No	SS2 6EX	n/a Local authority / private partnership (social enterprise)	1,475	10 suites from 10 to 70 sq m (18-person merged); 1,100 sq m	New space 'The Apiary': three x 2-person units	n/a	Office	12-month term	Hot desk £105pcm; fixed desk £255pcm; Incl. broadband, utilities, cleaning	n/a	https://thehive.org.uk/
The Link Business Centre	Southend-on-Sea	Southend-on-Sea	No	SS2 6BU	n/a Private (commercial)	202	9 + Units (11 sq m - 26 sq m)	n/a	none	Mainly Office	n/a	n/a	n/a	https://www.thelinkbusinesscentre.com/services
(Thurrock) Riverside Business Centre, Fort Road, Tilbury	Thurrock	Tilbury	Yes	RM18 7ND	n/a Local authority / private partnership (Social enterprise part of Norfolk)	2,614	40 units (8sqm -171 sqm)	n/a	none	Workshops, studio units and recently refurbished offices, meeting rooms	n/a	n/a	NWES - total business support to boost self-employment and	https://www.nwes.org.uk/workspace/spaces/nwers-ide-business-centre-
Creative Music Studios	Thurrock	West Horndon	No	CM13 3LX	n/a Private (commercial)	140	3 studios	n/a	Musix	Studios / rehearsal rooms	minimum 4 hours	Studio 1 - £8 per hour. Minimum 4 hour booking for evenings & weekends - £32. / Studio 2 - £9 per hour. Minimum 4 hour booking for evenings & weekends -	n/a	http://www.creativemusicstudios.co.uk/studio.html
Eleven 16 Studios	Thurrock	Stanford-le-Hope	No	SS17 0BZ	n/a Private (commercial)	88	n/a	n/a	n/a	Studio	n/a	Hourly rate: Monday to Friday: £50 / Saturday to Sunday: £75. Half day rate: (4hrs) Monday to Friday: £150 / Saturday to Sunday: £200. Daily rate: (8hrs)	n/a	https://www.eleven16studios.co.uk/studio-hire/
High House Artists' Studios	Thurrock	Purfleet	n/a	RM19 1TT	2013 Local authority / private partnership	n/a	39 self-contained studios and four work/live units. The ground floor	n/a	Creative	39 self-contained studios and four work/live units. The ground floor	Often only available on a long term tenancy. No units available on	£8.78 (upper floors) and £9.64 (ground floor) per square foot per year. From £100 per month	n/a	http://www.acme.org.uk/studios/highhouse
Impulse Leisure – Belhus Park	Thurrock	South Ockendon	n/a	RM15 4PX	n/a Private (commercial)	n/a	n/a	n/a	none	Meeting Room	n/a	n/a	n/a	https://impulseleisure.co.uk/centres/belhus-park

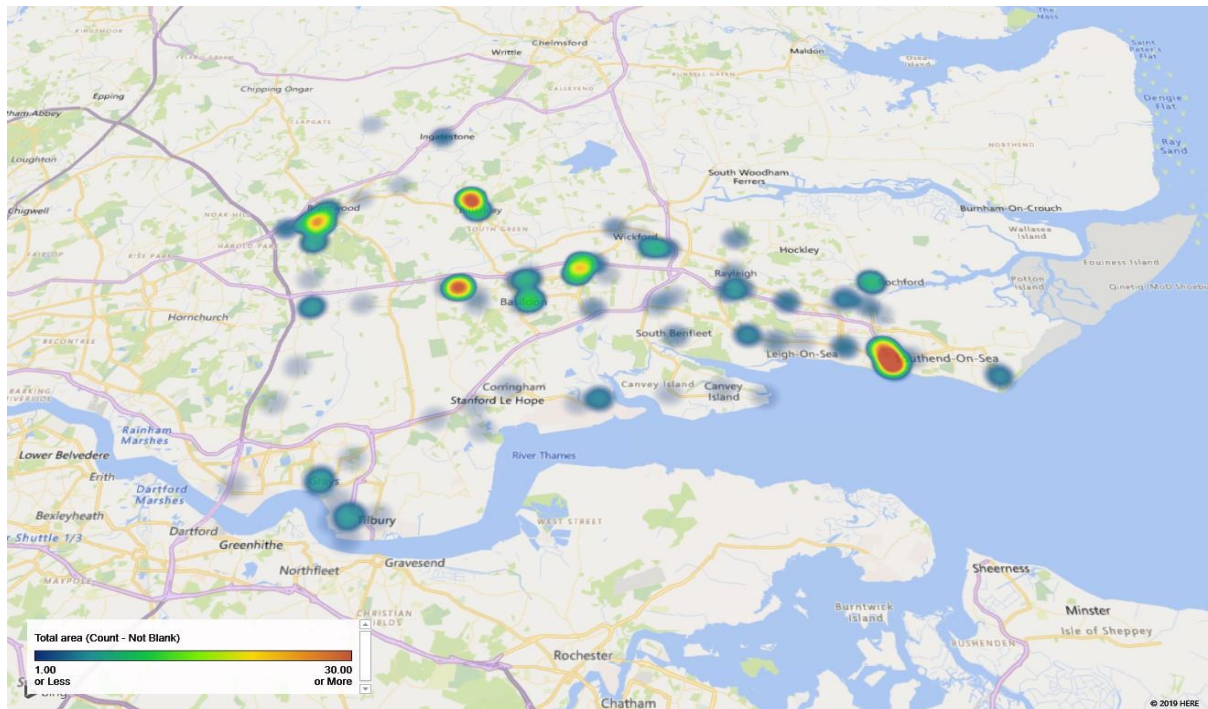
Impulse Leisure - Corringham	Thurrock	Stanford-le-Hope	n/a	SS17 7NB	n/a Private (commercial)	n/a n/a	n/a	none	Meeting Room	n/a	n/a	n/a	https://impulseleisure.co.uk/centres/corryingham
Royal Opera House Production Park	Thurrock	Thurrock	n/a	RM19 1RJ	2010 Partnership between Arts Council England, Creative & Cultural	n/a n/a	n/a	Performing arts and live music industries.	Workshops	n/a	n/a	n/a	http://www.roh.org.uk/venues/production-workshop
Thames Enterprise Centre	Thurrock	East Tilbury	No	RM18 8RH	n/a Private (commercial)	1,102 12 sq m - 121 sq m offices	n/a	none	Fully serviced offices (Hot or foxed desks, private office units) /	n/a	Virtual Bronze - £55 +VAT pcm; Virtual Silver (13 desk days per quarter) - £85 pcm; Hot Desks Gold - £173 + VAT pcm; Fixed Desk Platinum - £260 pcm +	n/a	https://www.thamesenterprisecentre.co.uk/
The Backstage Centre	Thurrock	Purfleet	No	RM19 1RJ	n/a Private (commercial)	532 19 units	n/a	Entertainment	Office, studios, workshop	n/a	n/a	n/a	http://thebackstagecentre.com/event-spaces/detail/high-house
The Old Courthouse Business Centre, Grays	Thurrock	Grays	No	RM17 5DD	n/a Local authority / private partnership (Social enterprise part of Norfolk	1,187 37 +units (from 7sqm - 92 sqm)	n/a	none	Private offices, meeting rooms, business lounge, break out space	n/a	n/a	NWES - total business support to boost self-employment and	https://www.nwes.org.uk/workspace/spaces/the-old-courthouse-thurrock/
Thurrock Centre for Business, George Street, Grays	Thurrock	Grays	No	RM17 6LY	n/a Local authority / private partnership (Social enterprise part of Norfolk	272 13 units (6 sqm to 32 sqm)	n/a	none	Meeting rooms / office space	n/a	n/a	NWES - total business support to boost self-employment and	https://www.nwes.org.uk/workspace/spaces/thurrock-centre-for-business/

6 Stock - Grow-on Space

NB - Colour gradient scale varies between maps.

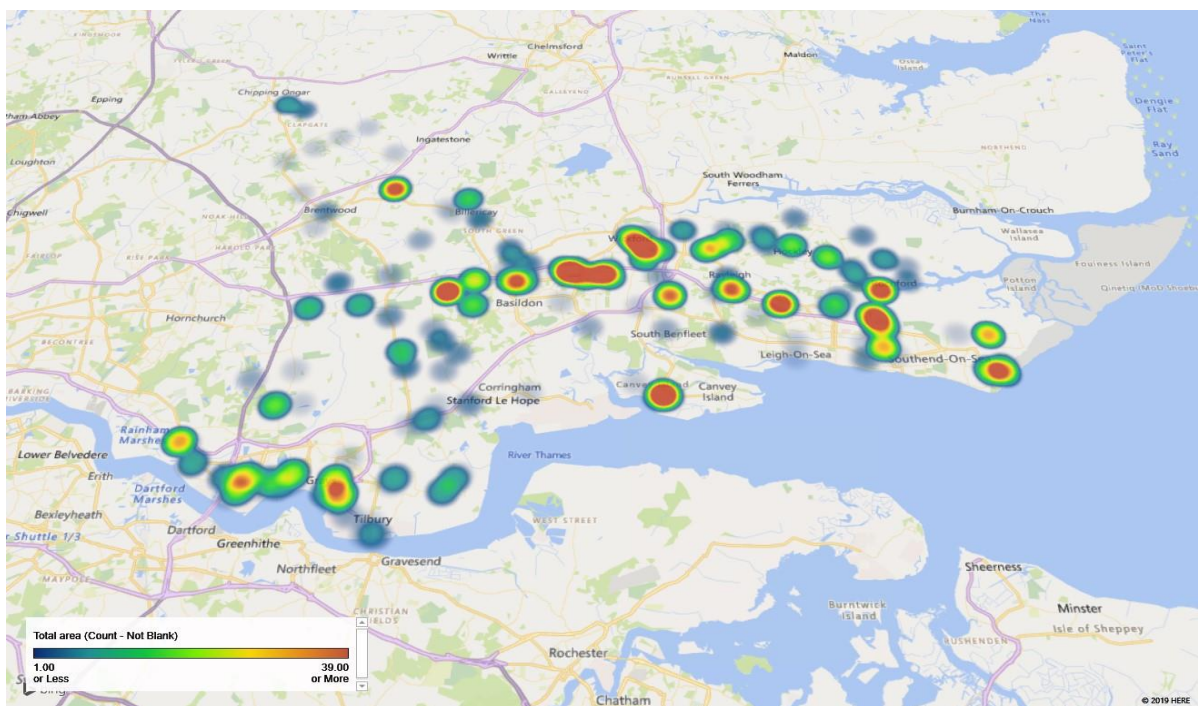
Offices

Billing authority	Grow-on Space - hereditaments	Total hereditaments	Grow-on Space (% of total hereditaments)	Grow-on Space - Floorspace (sq m)	Total floorspace (sq m)	Grow-on Space (% of total floorspace)
Basildon	219	989	22.1%	58,737	212,670	27.6%
Brentwood	116	684	17.0%	32,058	174,375	18.4%
Castle Point	43	224	19.2%	10,349	28,007	37.0%
Rochford	59	414	14.3%	15,436	41,618	37.1%
Southend-on-S	191	981	19.5%	47,557	205,116	23.2%
Thurrock	79	531	14.9%	20,782	96,036	21.6%
Total	707	3,823	18.5%	184,918	757,822	24.4%



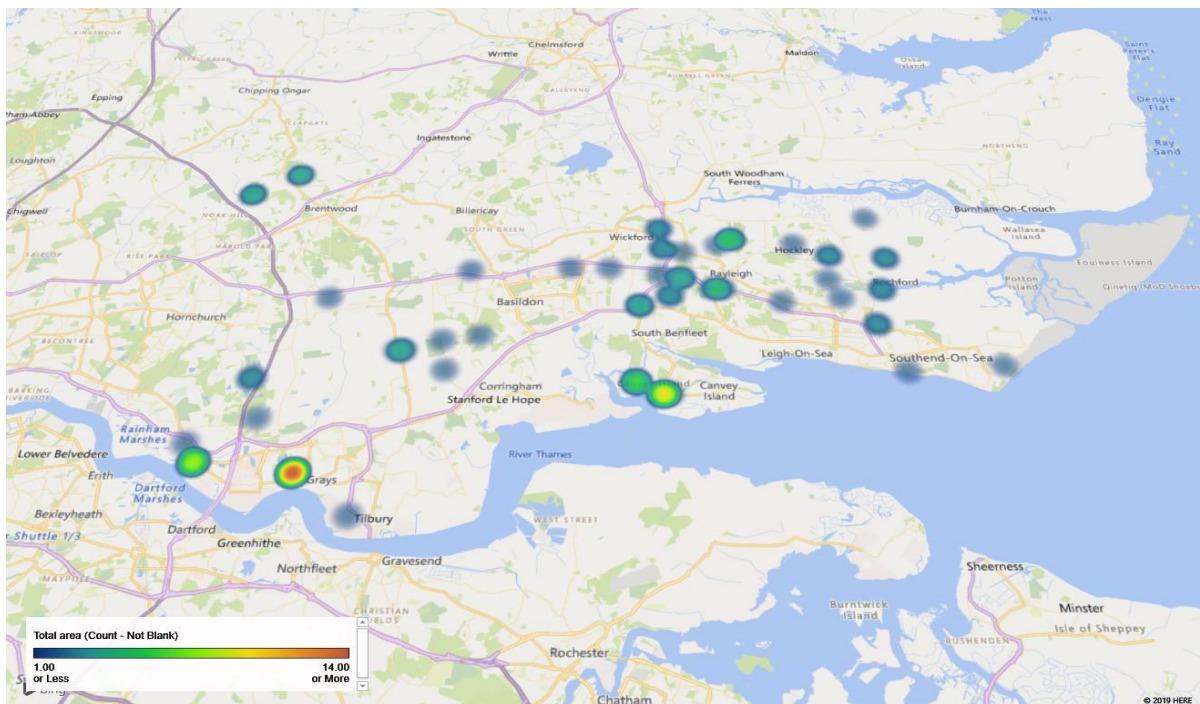
General Industrial

Billing authority	Grow-on Space - hereditaments	Total hereditaments	Grow-on Space (% of total hereditaments)	Grow-on Space - Floorspace (sq m)	Total floorspace (sq m)	Grow-on Space (% of total floorspace)
Basildon	709	1,781	39.8%	200,431	1,311,176	15.3%
Brentwood	151	404	37.4%	44,752	238,685	18.7%
Castle Point	177	531	33.3%	44,914	211,208	21.3%
Rochford	337	769	43.8%	89,665	302,520	29.6%
Southend-on-S	356	956	37.2%	99,755	441,664	22.6%
Thurrock	428	1,178	36.3%	118,655	1,132,226	10.5%
Total	2,158	5,619	38.4%	598,172	3,637,478	16.4%



Storage and distribution

Billing authority	Grow-on Space - hereditaments	Total hereditaments	Grow-on Space (% of total hereditaments)	Grow-on Space - Floorspace (sq m)	Total floorspace (sq m)	Grow-on Space (% of total floorspace)
Basildon	44	221	19.9%	12,547	208,534	6.0%
Brentwood	28	577	4.9%	7,331	113,786	6.4%
Castle Point	38	134	28.4%	10,348	143,582	7.2%
Rochford	60	257	23.3%	15,633	152,536	10.2%
Southend-on-S	37	242	15.3%	8,892	51,861	17.1%
Thurrock	66	426	15.5%	19,654	1,366,192	1.4%
Total	273	1,857	14.7%	74,405	2,036,491	3.7%



7 Pipeline - Start-up / Grow-on Space

Name	Market area	Use Type	Description	Total floorspace (sq m)	Land available	Funding / delivery partner secured	Outline planning permission secured	Full planning permission secured	Enabling works / strategic infrastructure completed	Started on site
Thamesview 130 Business Park	Castle Point	Industrial	15 plots being marketed with potential for property sizes from 260 sq m to 665 sq m	4,655	Being actively marketed	Offered on a pre-let basis; delivery partners identified	Yes	Some units due for completion April 2019	Some units due for completion April 2019	Some units due for completion April 2019
Phoenix House, Christopher Martin Road, Basildon	Basildon	Office		228	n/a	n/a	n/a	16/01/2019	n/a	n/a
Unit 8, Chester Hall Lane, Basildon	Basildon	Office		377	n/a	n/a	n/a	08/01/2019	n/a	n/a
Molineaux House, Russell Gardens, Wickford	Basildon	Office		484	n/a	n/a	n/a	26/07/2018	n/a	n/a
Burnt Mills Industrial Estate, Stock House, Josselin Road, Basildon	Basildon	Office		440	n/a	n/a	n/a	19/02/2018	n/a	n/a
Brindles Farm House, Hanging Hill Lane, Brentwood	Brentwood	Office	Workshop	258	n/a	n/a	n/a	10/04/2018	n/a	n/a
Land At Lower Road Widvale Road Mountnessing Brentwood Essex CM15 0TR	Brentwood	Office		244	n/a	n/a	n/a	21/07/2016	n/a	n/a
1-3 Orsett Road Grays Essex RM17 5DA	Thurrock	Office		471	n/a	n/a	n/a	28/06/2016	n/a	n/a
Acorn Trading Estate, Gumley Road, Stifford, Grays	Thurrock	Office		182	n/a	n/a	n/a	23/06/2017	n/a	n/a
Riverside Business Centre, Tilbury	Thurrock	Industrial	Expansion of existing start-up workspace	n/a	Southend Borough Council ownership	Funding being sought	n/a	n/a	n/a	n/a
Launchpad, Southend Airport Business Park	Rochford	Office	Managed workspace on a 0.94ha site	3,669	Southend Borough Council ownership	Partnership between Southend Borough Council and Henry Boot; funding being sought	06/10/2016	n/a	Estate road delivered	n/a
Innovation Warehouse, Basildon	Basildon	Office / industrial	Managed workspace	1,050	Basildon Borough Council ownership	Local Growth Fund application pending	n/a	n/a	n/a	n/a
High House Production Park, Purfleet	Thurrock	Office / industrial	New accommodation for creative and digital sectors	n/a	Southend Borough Council has positive relationship with land owner	n/a	n/a	n/a	n/a	n/a