

# Bristol & Bath

## Development and investment hotspots

J21 Enterprise Area

Filton Enterprise Area

Avonmouth Severnside Enterprise Area

Emersons Green Enterprise Area

Bristol Temple Quarter Enterprise Zone

Bath City Riverside Enterprise Area

# Contents

02	Key reasons to invest
04	Bristol Temple Quarter Enterprise Zone
06	Bath City Riverside Enterprise Area
08	Junction 21 Enterprise Area
10	Map of investment and development hotspots
16	Filton Enterprise Area
18	Emersons Green Enterprise Area
20	Avonmouth-Sevenside Enterprise Area
24	Bristol & Bath market review



# Investing in Bristol & Bath

Welcome to a £26bn economy

The Bristol and Bath region is an economic powerhouse for the UK. Its £26bn economy contributing billions to the Treasury every year.

This ambitious hotspot is home to six business districts, fast global and UK transport links, well-priced housing and world-class centres of excellence.

Many global and niche players are already thriving here, securing record growth in the region's five key industries: creative and digital, high tech, low carbon, aerospace and advanced engineering and professional services.

This success is underpinned by a cutting-edge R&D base, leading academic institutions and high-calibre graduates.

We invite you to invest in this exciting city region and be part of an extraordinary success story.

As UK powers devolve from London, this region aims to secure an additional £1bn investment in infrastructure, adding £2bn to the local economy.

- **£26bn** economy
- **£10bn** annual contribution to the Treasury
- **£1bn+** investment already in place over next two decades
- **£2bn+** GVA if devolved powers are secured
- **£242m** for major schemes in Bristol, Bath and Weston-super-Mare (2011-18)
- **78 mins** Bristol-London by train thanks to 2018 electrification
- **No.1** best major UK city for quality of life

\*Sustainable Cities Index 2010



# Key reasons to invest

Upgraded infrastructure, expanding centres of excellence and a deep talent pool

Bristol & Bath has the vision and strategy to grow, and the Government and private sector backing to make it happen.

## Unlocking land and commerce

The region is unleashing the potential of major brownfield and greenfield sites thanks to grants, growth funds and schemes totalling hundreds of millions of pounds.

- **£1bn** land portfolio released in Bristol
- **£500m** Bristol City Deal investment
- **£27m** injection into Bath
- **£59m** in European funding
- **£15m** for Weston-super-Mare

## Faster transport and connectivity

Investment in motorways, trains, the international airport and port and the region's broadband network will take your business further, faster.

- **100+** flights per day and a growing list of destinations from Bristol Airport
- **4** motorways affording fast access to all UK regions
- **£2.5bn+** investment in electrifying the rail line to London
- **78 mins** Bristol-London by train from 2018
- **£200m** Bristol MetroBus transport upgrade
- **Faster broadband** Bristol speeds are 33.8Mbps compared to 22.8Mbps nationally
- **£450m** investment in the region's deep sea port

## Boosting skills and employment

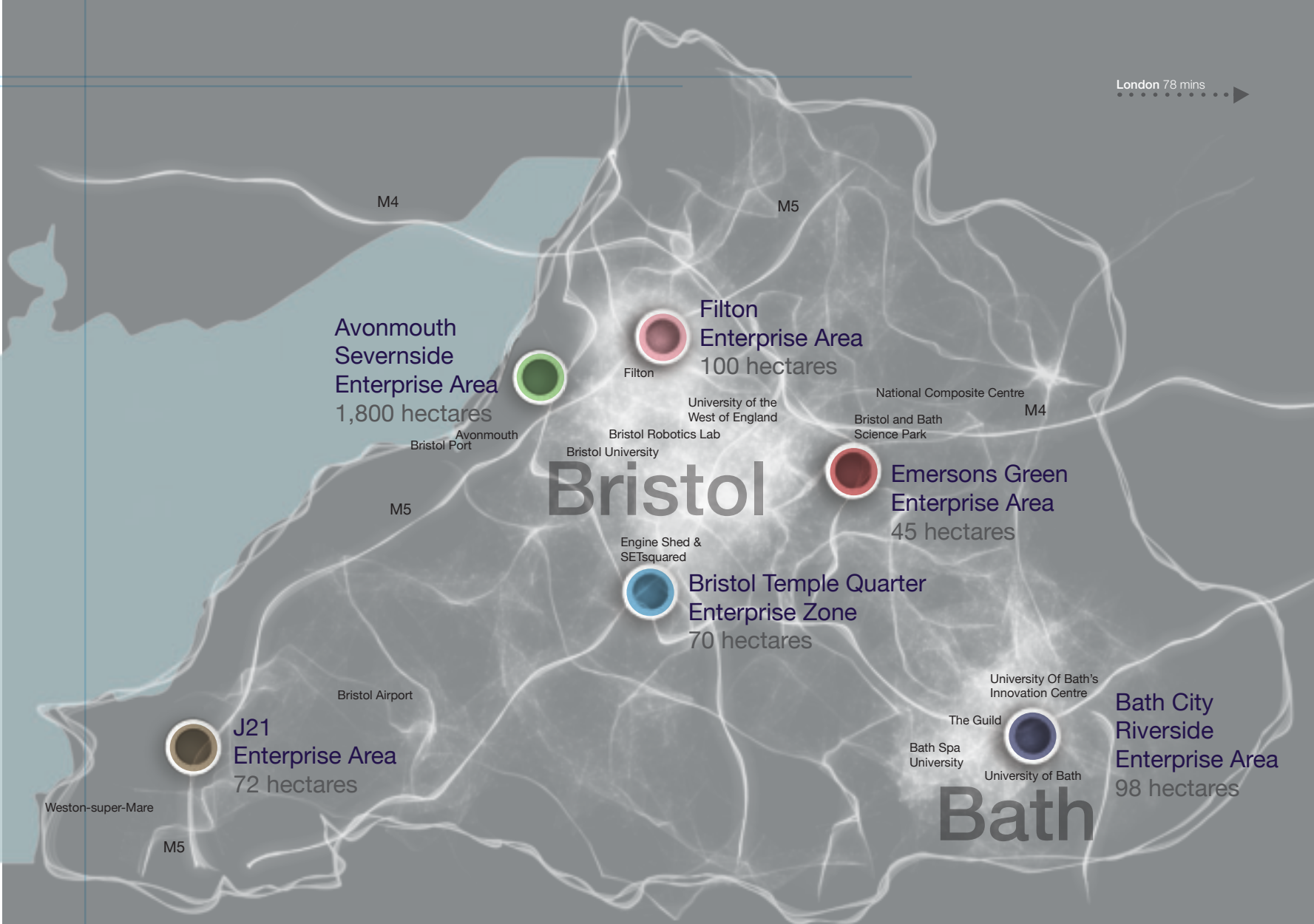
Bristol & Bath is renowned for the talented workforce, high-calibre graduates and expansive staff catchment area.

- **42m** people within 150 miles
- **4** top universities
- **10,000** graduates every year
- **Most** skilled workforce of any English core city
- **17,000** jobs being created 2012-2037
- **9 out of 10** residents work locally

## Expanding centres of excellence

The region's key sectors are all benefiting from a major fillip of funding and new ideas.

- **£1bn** GVA from creative industries by 2020
- **Top flight** the Advanced Technology Centre is powering aerospace and advanced engineering growth
- **£28m** injected into the National Composites Centre
- **£20m** research portfolio at the Nuclear Research Centre
- **Green energy** breakthroughs at the Bristol Channel Tidal Energy Test Bed and the UK Tidal Blade Test Facility
- **Tech funding** into the Technology and Innovation Centre; university-based centres for innovative manufacturing and the Manufacturing Advisory Service



Business-ready infrastructure across six enterprise hotspots

Bristol & Bath encompasses one 'enterprise zone' and five 'enterprise areas'. The Government-backed business districts offer rate discounts, simplified planning, on-site partners and customers, superfast broadband and easy access to labour pools, motorways, rail, airports and ports.



# Bristol Temple Quarter Enterprise Zone

The UK's most exciting metropolitan business destination

As one of the UK's largest urban regeneration projects, this enterprise zone offers more than 240,000m<sup>2</sup> of accommodation for commercial, residential, retail and leisure use.

Developers and occupiers benefit from a business rate discount scheme, simplified planning and ubiquitous superfast broadband.

The zone is already home to a healthy crop of digital, tech and professional services companies, and is ideally suited to go-ahead creative and green sector players.

Infrastructure is being augmented on a grand scale. Shorter journey times are on track thanks to electrification of the Bristol-London railway line, with plans to redevelop the main Temple Meads station currently being worked up.

A 12,000-capacity arena is opening in 2018, £21m is being ploughed into access, £11m into superfast broadband, £11m into a multi-lane bridge and £200m into the MetroBus scheme, creating fast links throughout the city.

The zone's trophy office development is 2 Glasswharf, Temple Quay, a £40m scheme which has secured record rents for the city.

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## Size

70 hectares

## Planning status

110,000m<sup>2</sup> of development already has planning permission, with capacity to develop at least 130,000m<sup>2</sup> more.

## Ownership

The majority of development sites are in single ownership. The council's simplified planning system and dedicated planning service is designed to unlock the potential of sites and rapidly respond to enquiries.

## Who's here?

Some 350 businesses including law firm Burges Salmon, IBM, Osborne Clarke, Canada Life, HSBC, PwC and leading design and consultancy firm Arcadis.



# Bath Enterprise Area

A mixed-use riverside development in the heart of a World Heritage city

Set in the heart of the Bath Enterprise Area, Bath Quays North is a ground-breaking scheme combining retail, food and beverage outlets, high-quality housing, public space and Bath's largest ever office scheme.

The development, which boasts sought-after south-facing river frontage, will connect the UNESCO World Heritage city of Bath to the River Avon and has an estimated gross development value of £125m.

A new bridge will link the scheme to Bath Quays South to form a brand new central business district for the city.

Bath Quays North is just three minutes' walk from Bath Spa railway station, putting London just 70 minutes away once the train line is electrified in 2018.

Bath Quays North will draw talented staff from Bath's skilled workforce and two world-class universities, and is predicted to build on the city's success in finance, professional services, tech and creative industries.





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## Size

2.47 hectares

## Ownership

Bath & North East Somerset Council

## Planning status

Scheme elements include 240,000 sq ft of offices, 40,000 sq ft of food and beverage outlets, around 100 residential units and some 400 parking spaces. Planning consent is expected in 2017 with works commencing in 2018. Completion is scheduled for 2021.

## Who's here

Phase one of works is scheduled to start in 2018, with businesses and retailers expected to take up residence from 2019.



# Junction 21 Enterprise Area

A well-connected hub for manufacturers, food brands and professional services firms

Junction 21 offers a winning combination: excellent transport links, a diverse local economy and a highly skilled talent pool as an integral part of a town of 76,000 residents combined with substantive investment opportunities.

Situated close to the M5/M4 interchange, an international airport and deep water port, Junction 21 Enterprise Area provides unrivalled access to markets and supply chains across the South West, Wales, Europe and beyond.

A 9,000-home development is on the immediate doorstep, affording incoming businesses with a readymade, hyper-local workforce.

Building on the rich heritage of industry and innovation, Junction 21 Enterprise Area is part of a £1bn investment with realistic plans by a pro-development administration for 10,000 jobs to be created by 2030.

This area particularly appeals to manufacturing, food innovation and financial and professional service businesses. A diverse range of opportunity awaits through existing premises and immediately available land.

## Size

72 hectares

## Ownership

Persimmon Homes, Homes and Communities Agency, St Modwen, Dowlas, KMW Developments, Mead Realisations, Summerfield Developments (SW), Abbey Manor Group, North Somerset Council.

## Planning status

The entire Junction 21 Enterprise Area benefits from either outline or full planning permissions covering all B class uses. The majority are 'shovel ready' with marketing and development strategies in place.

## Who's here

Network Rail, Lidl, Safelab Systems Limited, Travelodge, Quest Global Engineering, Knightstone Housing Association.

## Opportunity to Invest

- SW Food Innovation Centre
- Enterprise House
- Strategically placed for nationally important infrastructure



### 1-8 Employment opportunities

- |                                 |                                 |
|---------------------------------|---------------------------------|
| 1. Westland Distribution Park   | 5. Britannia Court              |
| 2. Weston Business Quarter      | 6. Weston Gateway: Central Gate |
| 3. Weston Gateway Business Park | 7. Weston Gateway: South Gate   |
| 4. Red Lodge Business Park      | 8. Locking Villages             |

# Investment & development hotspots

## Commercial

SCHEME	OWNER/DEVELOPER	AGENT	PLANNING STATUS	SIZE (SQ FEET)
<b>BRISTOL CITY CENTRE</b>				
01 Aspire	CEG	CBRE/WGH		204,000
02 Bank Place 1	AXA/Bell Hammer	Lamber Smith Hampton/JLL		157,965
03 Bank Place 2	AXA/Bell Hammer	Lamber Smith Hampton/JLL		86,687
04 Portwall Tower	BCC	Bristol City Council	<b>Detailed consent</b>	62,563
05 Aurora – Finzels Reach	Cubex	Knight Frank/Savills		95,000
06 3 Glass Wharf	Salmon/NFUM	Alder King		115,000
07 Station Approach	Skanska	Alder King/Knight Frank		100,000
08 Victoria Central	London and County	Cushman & Wakefield		48,000
09 Glassfields, Temple Way	RLAM	Knight Frank/JLL		184,560
10 Temple Quay – ND 7	Legal & General	Alder King	<b>Outline consent</b>	Residential 150,000
11 Development plots at Arena Island	BCC	TBC		200,000
12 Wapping Wharf	Umberslade	Knight Frank/JLL		220,000
13 Temple Quay East	HCA / Network Rail	Hartnell Taylor Cook		150,000
14 ND6/Temple Quay	Bouygues	Alder King/Cusman & Wakefield	<b>Brownfield</b>	80,000
15 Harbourside (CPA)	Bristol City Council	Savills		80,000
16 Bristol Firestation	Avon Fire and Rescue	Lambert Smith Hampton		100,000
17 Cattle Market Road	Bristol City Council	TBC		100,000
18 A Bond	Bristol City Council	TBC		100,000
19 Generator Bdg – Finzels Reach	Cubex	KF/Savills		60,000
<b>SOUTH GLOUCESTERSHIRE</b>				
20 Harlequin Office Park Phase II	Shepherd Developments in association with Bell Hammer	Alder King/JLL	<b>Detailed consent</b>	83,000
21 Hempton Court (11 acres)	Foreign and Colonial	JLL		300,000
22 Bristol and Bath Science Park	Aviva & Quintain	CBRE/Bilfinger GVA		520,000
23 Land at Hewlet Packard	UWE	Alder King	<b>Outline consent</b>	72,000
24 Parkway Office site	Ashfield Land	JLL		200,000
25 Northfield Park, Filton	Goodman	Hartnell Taylor Cook		190,000



SCHEME	OWNER/DEVELOPER	AGENT	PLANNING STATUS	SIZE (SQ FEET)
26 Filton Airfield	YTL Malaysian	Alder King	<b>Brownfield</b>	750,000

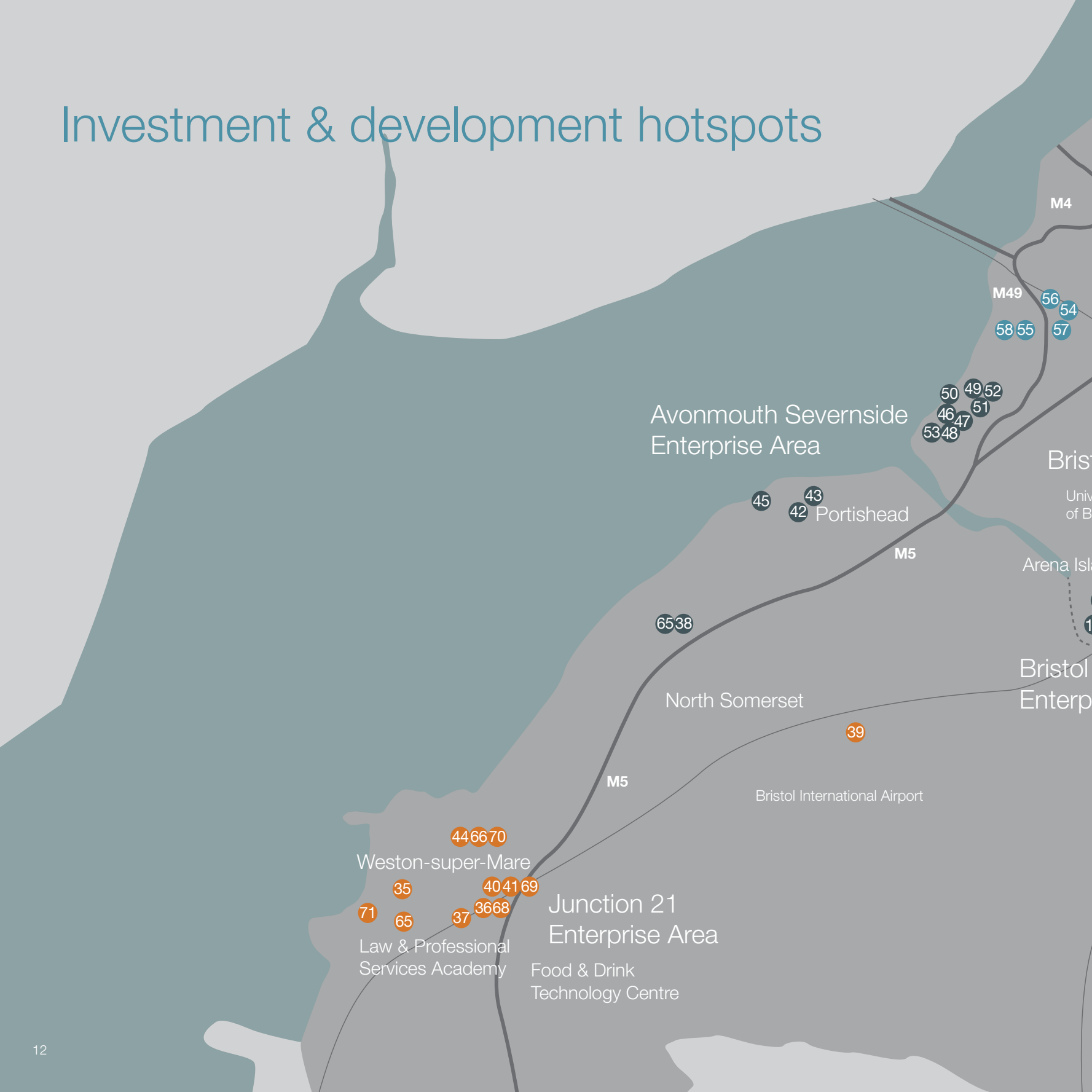
#### BATH & NORTH EAST SOMERSET (BANES)

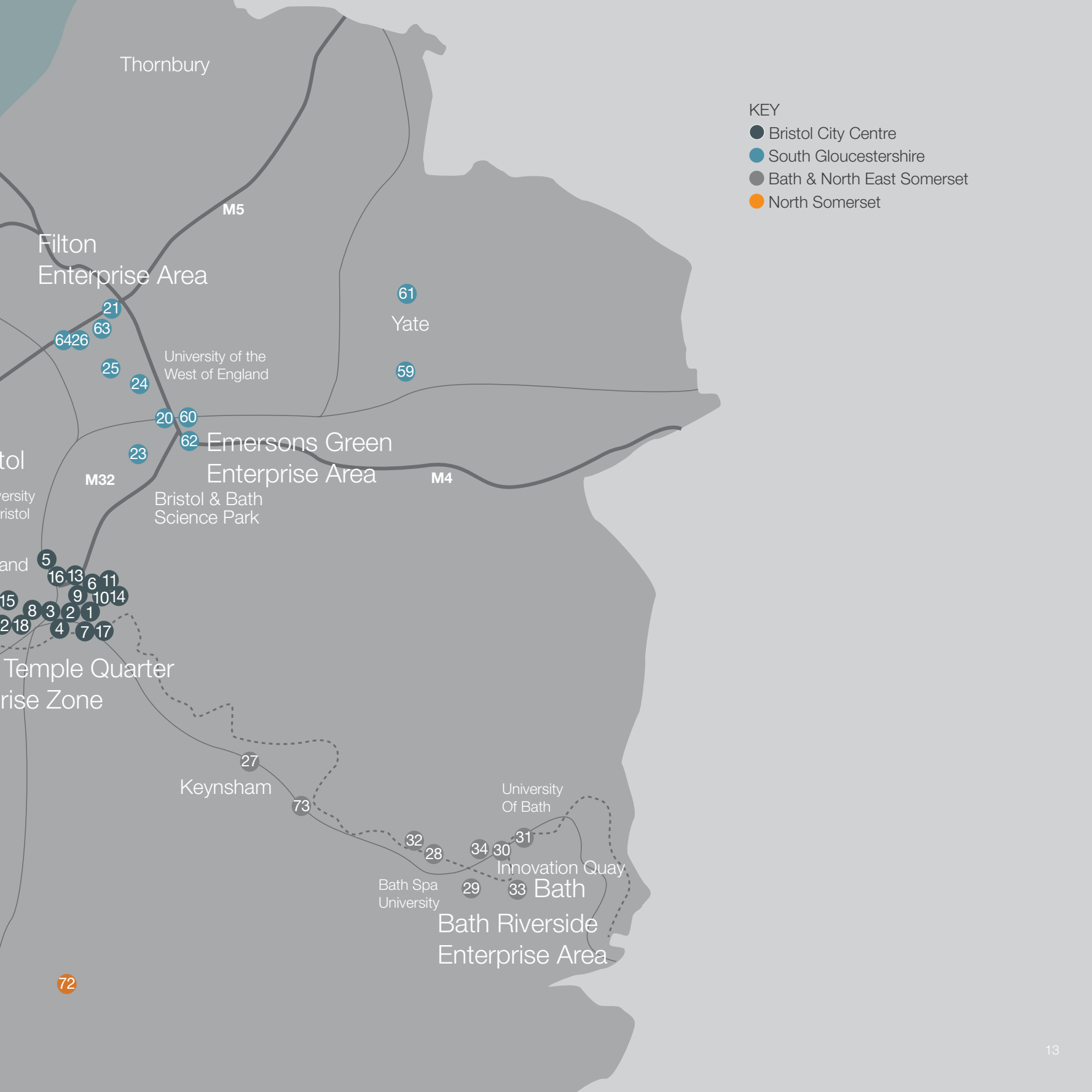
27 Chocolate Factory	St Monica	Alder King	<b>Detailed consent</b>	100,000
28 Bath Press	Meyer Bergman	GLHearn		14,000
29 Pinesgate	Ediston	Bilfinger GVA	<b>Outline consent</b>	100,000
30 Bath Quays North	B&NES Council	Lambert Smith Hampton	<b>Brownfield</b>	200,000
31 Cattle Market	B&NES Council	B&NES Council		37,500
32 Roseberry Place	Deeley Freed	Deeley Freed/JLL		130,680
33 20 Manvers Street	West Midlands Pension fund	Knight Frank	<b>Detailed consent</b>	45,000
34 Manvers Street Car Park	B&NES Council	B&NES Council	<b>Brownfield</b>	39,000

#### NORTH SOMERSET

35 Weston Business Quarter, Weston Airfield	Persimmon	Alder King	<b>Detailed consent</b>	150,000
36 Weston Gateway South	Abbey Manor	Alder King/JLL		100,000
37 Weston Gateway, Central	Summerfield Developments	Alder King/JLL		80,000
38 Clevedon Business Park	St Modwen	Alder King/WGH		330,000
39 Origin Office Park, Barrow Gurney	Del Piero	Alder King/Bilfinger GVA		150,000
40 Locking Parklands	St Modwen	Bilfinger GVA/WGH	<b>Outline consent</b>	37,000
41 Locking Parklands	St Modwen	Bilfinger GVA/WGH		100,000
42 Land at Wyndham Way, Portishead	Churngold	Alder King		16,000
43 Harbour Road, Portishead	AP Burt	WGH/Russel Property	<b>Outline consent</b>	86,100
44 Weston Gateway Business Park	Dowlas	Hartnel Taylor Cook/ Lambert Smith Hampton		196,000
45 Portisfields Phase II	Gladman	Cushman and Wakefield/ Lambert Smith Hampton	<b>Brownfield</b>	50,000

# Investment & development hotspots





# Investment & development hotspots

## Industrial

SCHEME	OWNER/DEVELOPER	AGENT	PLANNING STATUS	SIZE (ACRES)
BRISTOL				
46 Poplar Fields, Cabot Park, Avonmouth	Rockhaven Developments	Bilfinger GVA/Alder King	Outline consent	2.10
47 Poplar Fields, Cabot Park, Avonmouth	Rockhaven Developments	Bilfinger GVA/Alder King		3.75
48 Poplar Gate, Cabot Park, Avonmouth	Cabot Property Partnership	Bilfinger GVA		4.05
49 Access 18, Avonmouth	St Modwen	Knight Frank/Alder King	Under construction	24.00
50 Phase 2, Portside, Avonmouth	Bericote	Hartnell Taylor Cook	Brownfield/ Outline consent	7.60
51 Cabot Park, Avonmouth	Blackrock / Canmoor	Knight Frank/JLL	Brownfield	80.00
52 Rockingham South, Avonmouth	Walters Plant Limited	Alder King		9.10
53 Atlantic 18, Avonmouth	Private Developer	Alder King		16.00
SOUTH GLOUCESTERSHIRE				
54 Westgate, Western Approach, Severnside	Harrow Estates/ Robert Hitchins Limited	Cushman & Wakefield/ JLL/Hartnell Taylor Cook	Detailed consent/ 1957 consent	296.00
55 Portal West, Western Approach, Severnside	Spenhill / Tesco	JLL		65.00
56 Central Park, Western Approach, Severnside	Severnside Distribution Land Ltd / Roxhill	Knight Frank/ Bilfinger GVA		230.00
57 SEGRO, Western Approach, Severnside	SEGRO	JLL	Detailed consent	13.00
58 IDI Gazeley	Gazeley/ Brookfield Logistics	Cushman & Wakefield/ JLL		6.15
59 Vertex Park, Emersons Green	Taylor Wimpey/Stoford	Alder King/ BNP Paribas Real Estate	Outline consent	5.00
60 Bristol and Bath Science Park	Aviva / Quintain	CBRE/ Bilfinger GVA		30.00
61 Apollo Park, Yate	Chancerygate	Colliers International/ JLL	Brownfield/ Under construction	6.57
62 Avlon Park, Severnside	Bericote	Colliers International/ Dowley Turner Real Estate	Brownfield/ Outline consent	85.00



SCHEME	OWNER/DEVELOPER	AGENT	PLANNING STATUS	SIZE (ACRES)
63 Horizon 38, Filton	St Francis Group/ Marcol/BP Pension Fund	JLL/Bilfinger GVA/ Colliers	<b>Detailed consent/ Under construction</b>	65.00
64 Filton Airfield, Filton	YTL Malaysian	Alder King	<b>Brownfield/ Under consultation</b>	62.00

#### NORTH SOMERSET

65 Clevedon Business Park, Clevedon	St Modwen	Alder King/Williams Gunter Hardwick	<b>Detailed consent</b>	22.00
66 Weston Business Quarter, Weston Airfield, Weston-super-Mare	Persimmon	Alder King		40
67 Weston Gateway South, Weston-super-Mare	Abbey Manor	Alder King/JLL	<b>Detailed office consent</b>	3
68 Weston Gateway Central, Weston-super-Mare	Summerfield Developments	Alder King/JLL		5
69 Locking Parklands, Weston-super-Mare	St Modwen	Bilfinger GVA/WGH		13
70 Weston Gateway Business Park, Weston-super-Mare	Dowlas	Hartnell Taylor Cook/ Lamber Smith Hampton	<b>Outline consent</b>	10
71 Weston Links, Weston-super-Mare	Avoncrest / North Somerset Council	Cushman & Wakefield / Russell Property Consultants	<b>Brownfield</b>	65.00

#### BATH & NORTH EAST SOMERSET (BANES)

72 Old Mills, Paulton	Multilple Ownership (5)	None	<b>Greenfield</b>	34.00
73 East of Keynsham	Multilple Ownership (5+)	None		20.00

# Filton Enterprise Area

A world-class centre for aviation innovation, with room to grow a diversity of aerospace and associated business in the sought after north fringe of Bristol within a stones through of one of the most exciting new urban housing developments in the country.

Located close to the M4 and M5 motorways, Filton is centred on the vast and historic advanced engineering and aerospace cluster, which consists of prime and tier one manufacturers supporting an array of local supply chains. Coupled with a world class talent pool and availability of new developments, it's no wonder that Filton is aiming to be the European powerhouse for the aerospace industry.

On top of £70m of investment in new building in Filton in recent years, Airbus is opening a £38m Wing Integration Centre here in 2017: some 300 highly skilled engineers will stress test aircraft wings, fuel systems and landing gear using the latest technology.

Planning has been approved for Horizon 38, a £120m, 1.2m sq ft mixed-use development comprising storage, car dealerships, trade counters and a luxury flagship hotel.

And funding is already in place for nearly 600,000 sq ft of warehouse and industrial units courtesy of a deal between St Francis Group, Marcol Industrial and the BP Pension Fund.

Filton is well known for the retail offer at The Mall at Cribbs Causeway. It's allure also continues unabated for car brands: Nissan and Ford have just built dealerships here, Tesla has a showroom in the Mall and the area will soon be home to showrooms full of gleaming Rolls-Royces and Aston Martins with units in development alongside existing BMW, Audi, Porsche and Mercedes-Benz.

## Size

100 hectares

## Ownership

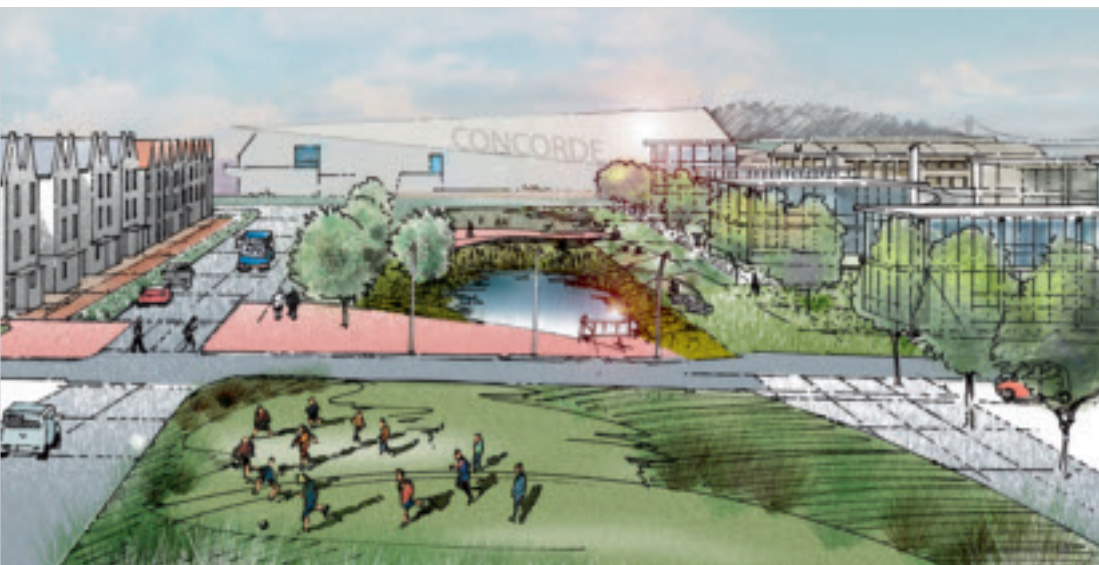
YTL Utilities (UK), St Francis Group & Marcol Industries, Goodman Business Parks, J.T. Baylis , M&G Investments, Airbus UK, BAE Systems

## Planning status

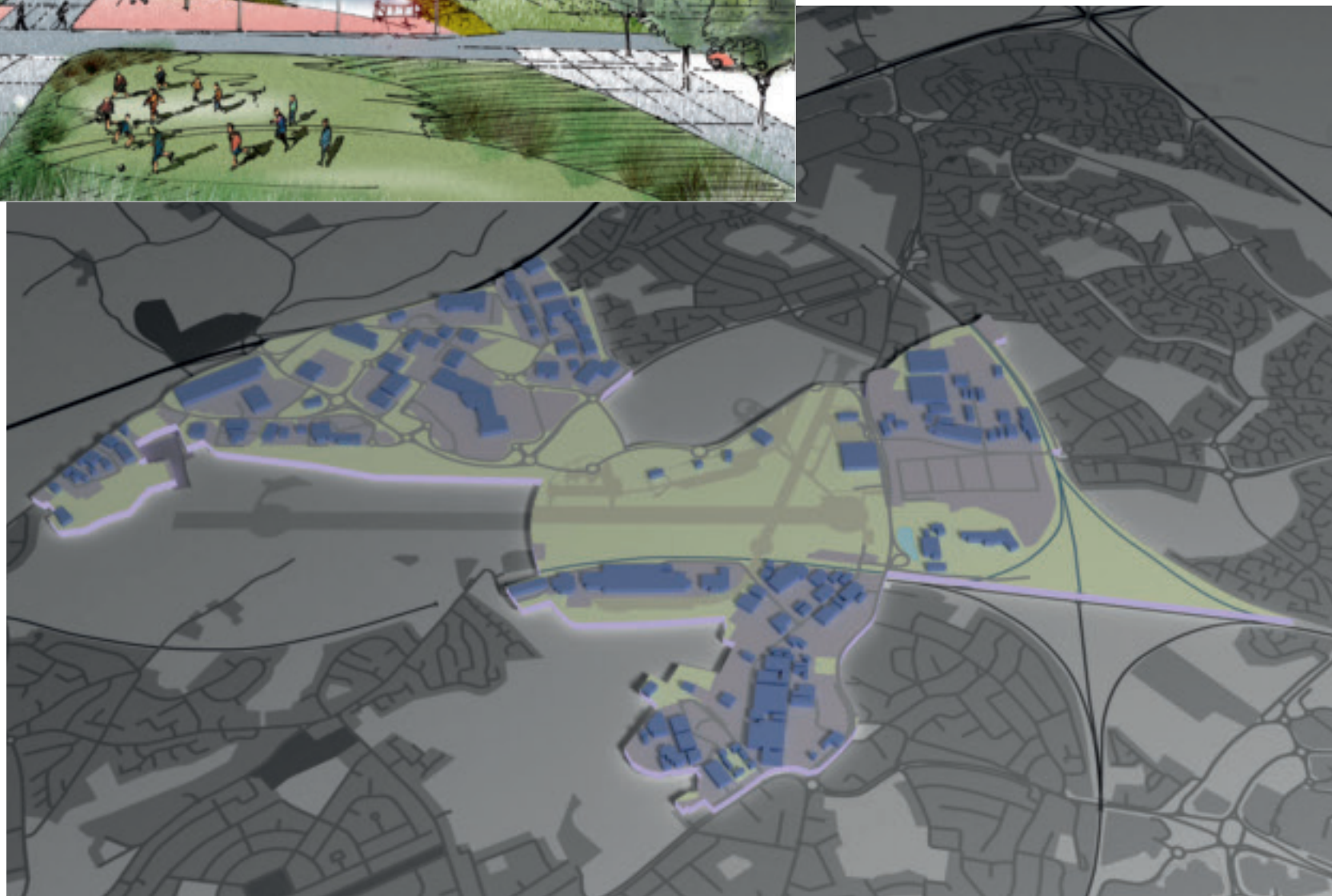
Core Strategy Policy CS26 and Cribbs Patchway New Neighbourhood Draft Supplementary Planning Document

## Who's here

Airbus, Rolls-Royce, GKN, BAE Systems, MBDA,



A £17.5m museum celebrating Concord, which was built in Filton, opens in 2017.



# Emersons Green Enterprise Area

Where academic innovation drives business and entrepreneurship

Emersons Green is a hotbed of collaboration, ambition and scientific breakthroughs located next to the M4/M5 motorway corridors.

The showpiece is Bristol & Bath Science Park, home to 40 tenants and supporting 350 highly-skilled jobs. Recent expansion has created accelerator space, workshops and labs for growing businesses, while the University of Bath is marrying academia and industry to develop advanced propulsion systems for the automotive sector in a new innovation centre.

The Science Park is also home to the National Composites Centre, an internationally renowned hub for aerospace, automotive and heavy infrastructure industries that is expanding fast thanks to a new R&D and commercialisation facility.

Other flagships include Stoford Developments' £12m, 36,000 sq ft grade A office development, already pre-let to ALD Automotive.

Emersons Green also offers an adjacent new residential community and additional emerging employment land to add to its mix of small and medium-size offices, light industrial units, warehouses and logistics firms.

## Size

Forty hectares including the remaining 22-hectares on the Science Park, 15 hectares of employment land at Vertex Park and three hectares across two further flexible sites.

## Planning status

Construction has already started on Stoford Developments' offices for ALD Automotive's and is scheduled for completion in November 2016. The Science Park has outline consent granted.

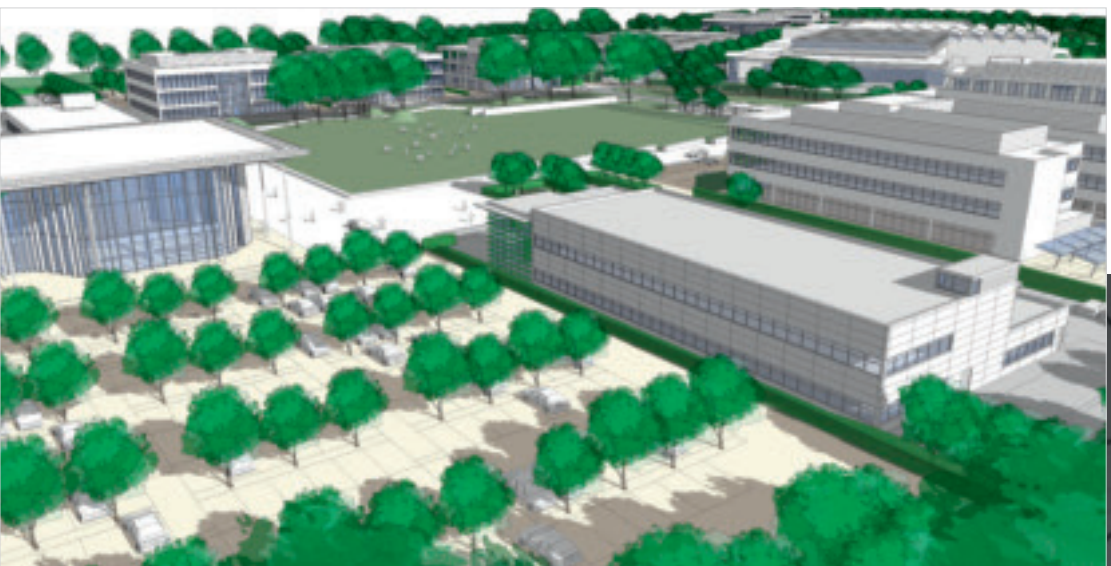
## Ownership

Quantum Property Partnership (a joint venture between Quintain Estates & Development plc and Aviva Investors), Taylor Wimpy, Stoford Developments, HMG Homes and Communities Agency

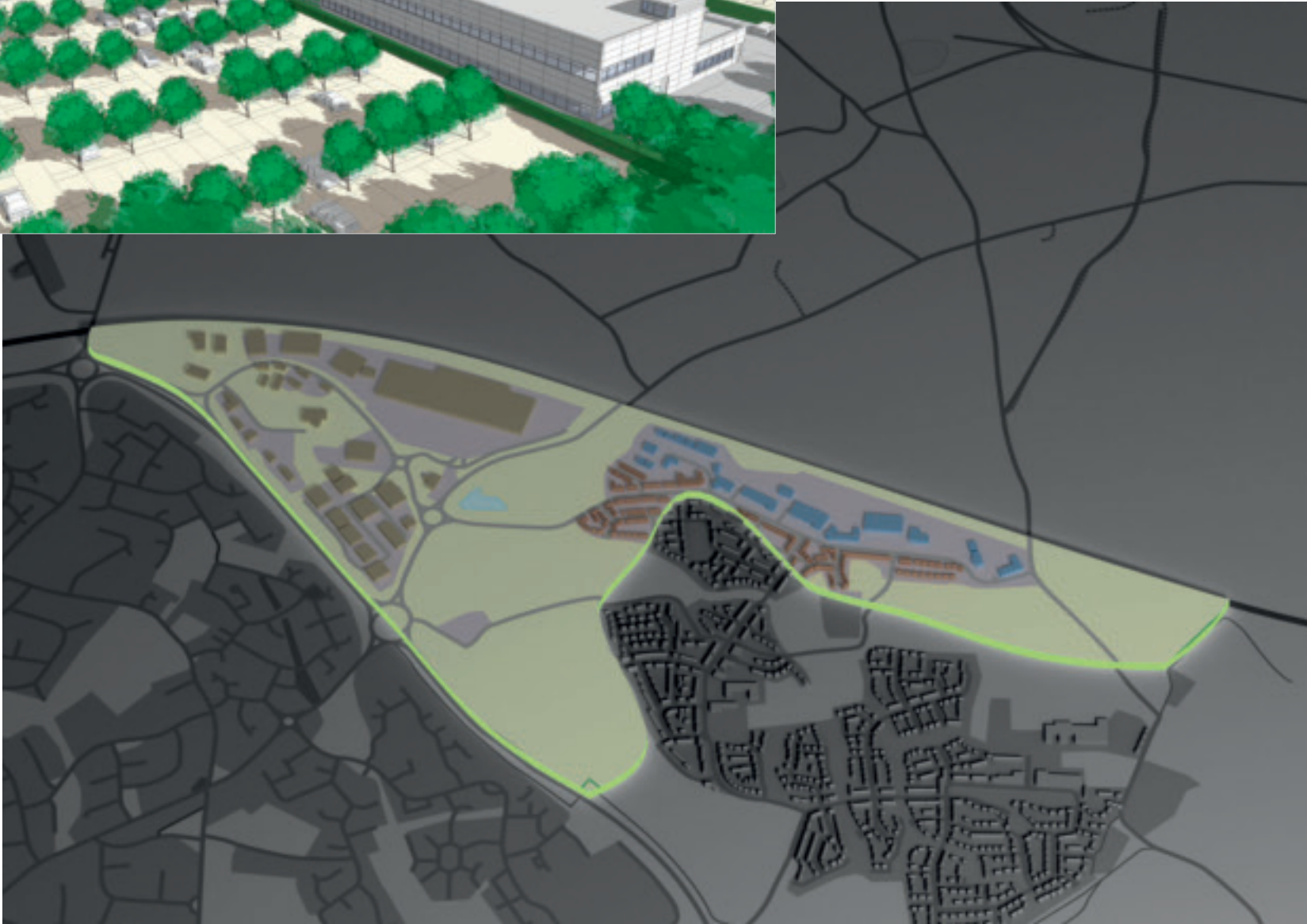
## Who's here?

Bristol & Bath Science Park (home to over 40 high tech SMEs), National Composites Centre, ALD Automotive.





Bristol and Bath  
Science Park



# Avonmouth-Severnside Enterprise Area

A vast estuary zone connected to the world via sea, road and rail.  
An ideal location for large scale logistics and environmental technologies.

Millions of pounds are being ploughed into this area's infrastructure, opening the door for pioneering logistics firms and retailers, energy companies, industrialists and entrepreneurs. With a new M49 motorway junction on the horizon, locating here will unlock a potential to serve 75% of the UK population within a 4 hour HGV drive time. Fast transport links are attracting large retailers such as The Range, which is building a £100m warehouse and distribution centre and creating more than 1,000 jobs.

Stretching along five miles of the estuary between Bristol and the River Severn, the zone comprises 1,800 hectares of industrial, brownfield and greenfield space.

Avonmouth is home to Bristol Port, rated as the UK's most cost-competitive deep sea port for logistics and with planning consent for a new deep sea container terminal is set for bigger and better things to come. Investors also benefit from immediate access to M5 and M49 motorways, an upgraded A road system, and quick access to Bristol Airport and the city's main railway stations, both under half an hour's drive away.

Energy is another exciting new presence: SITA UK's Severnside Energy Recovery Centre is on track to generate power for up to 50,000 homes from 2016.

Also, start-ups are being drawn here thanks to the £1.2m Coastal Communities SevernNet Working project, which is establishing business hubs, cycle paths and shuttle bus routes to connect homes to work.

## Size

1,800 hectares, of which 650 hectares is developable

## Ownership

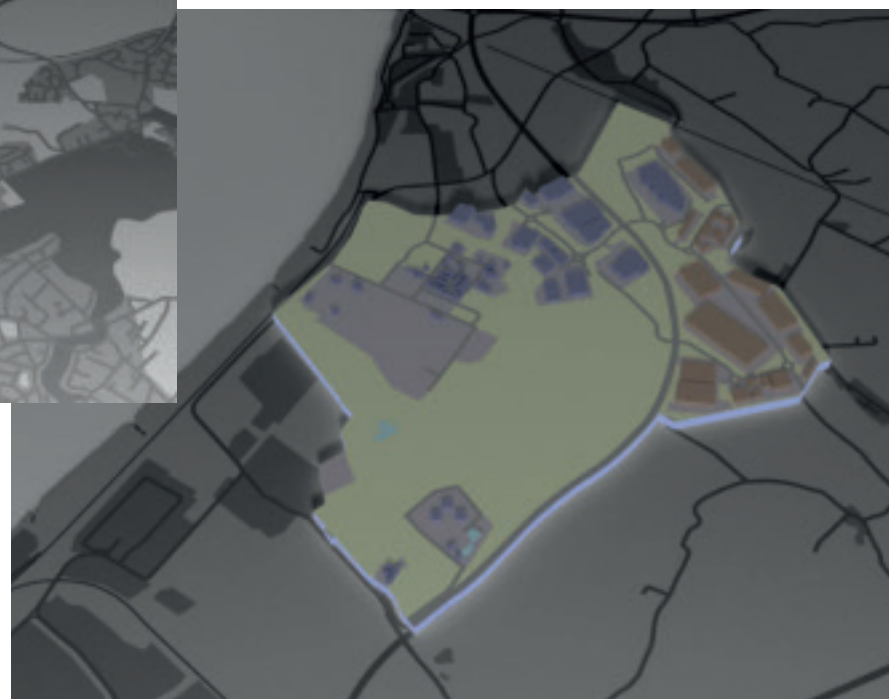
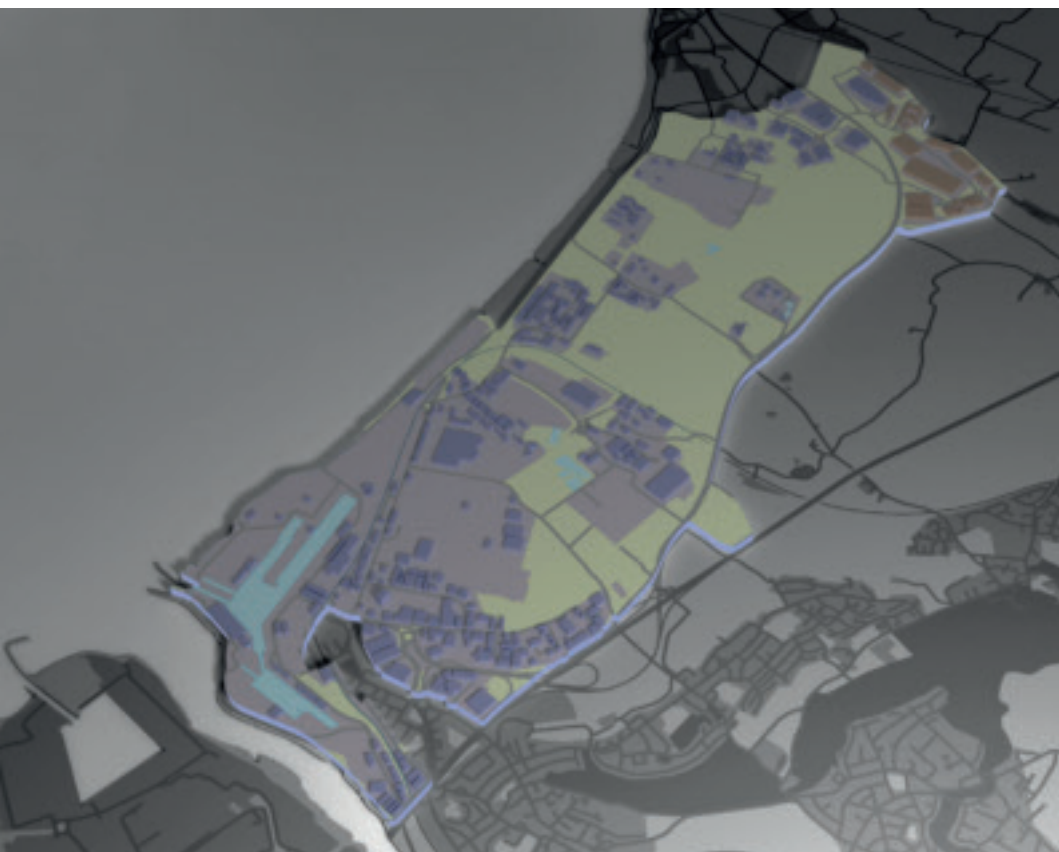
Multiple land owners working together across the vast enterprise area.

## Planning status

SITA UK's Severnside Energy Recovery Centre should be complete by the end 2016, while The Range's 55-acre warehouse and distribution centre opens in 2017. A large percentage of the enterprise area benefits from an extant permission.

## Who's here?

Tesco, Farm Foods, GKN Aerospace, Nisbets, Astra Zeneca, Warburtons, SITA UK, Accolade Wines, Asda Distribution, Cullina, John Lewis, Seabank Energy, Bristol Port Company, Toyota, CHEP, DSGi, NEXT, Gaymers





## Projects delivered





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Coming soon



**Chocolate Factory**  
Unique development  
opportunity, 11,600m<sup>2</sup>



**Aspire**  
Grade A office with cutting edge  
design, 20,000m<sup>2</sup>



**Cabot Gate, Bristol**  
Grade A office development  
at Bristol's Gateway, 14300m<sup>2</sup>



**Temple Gate**  
at Bristol



**Innovation Bridge**  
at Bath

# Market Review

The next 2 – 5 years are set to be a ‘watershed’ period in the redevelopment of Bristol & Bath

A combination of strong economic conditions, improvements to the region’s infrastructure and good performance across all sectors of the property market means all the conditions are in place for Bristol & Bath to make great strides in its redevelopment this year.

*“All development happens in cycles and we are now at a point at which Bristol is ripe for further investment and regeneration. It comes at a time of major investment into the city’s infrastructure including the electrification of the Great Western mainline, the MetroBus and the reconfiguration of Temple Meads, which are only going to add to the city’s appeal as a place to invest in.”*

*It’s unusual for all property sectors to be performing so well simultaneously, whether that’s hotels, shops, offices or industrial space, and this means there will be a richer, deeper tapestry of property across the city in the coming years as developments of all types vie for sites.”*

Jeremy Richards, head of Jones Lang LaSalle, Bristol







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Bath & North East  
Somerset Council

