

Hertford and Ware Employment Study

East Hertfordshire District Council

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Prepared for:

East Hertfordshire District Council

Prepared by:

AECOM Limited
Aldgate Tower
2 Lemn Street
London E1 8FA
United Kingdom

T: +44 (0)20 7061 7000

aecom.com

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Table of Contents

1.	Executive Summary	1
2.	Introduction.....	5
3.	Strategic Context.....	7
4.	Socio-economic Profile.....	15
5.	Property Market Assessment	25
6.	Existing Employment Sites.....	53
7.	Land for Employment Development.....	72
8.	Conclusions and Recommendations.....	77

Figures

Figure 4-1	Map of LSOAs to define 'Hertford and Ware'	15
Figure 4-2	Population breakdown by age (2024).....	16
Figure 4-3	Change in employment in Hertford and Ware 2015-2024.....	20
Figure 4-4	Hertford and Ware Inflows and Outflows.....	23
Figure 5-1	Office Properties in Hertford Town Centre by Typology.....	27
Figure 5-2	Office Properties in Ware Town Centre by Typology	28
Figure 5-3	Office Vacancy Rate (2014 Q1 to 2025 Q4)	30
Figure 5-4	Office properties - building stock size.....	31
Figure 5-5	Office Properties in Hertford Town Centre by Size	32
Figure 5-6	Office Properties in Ware Town Centre by Size	33
Figure 5-7	Office properties - building stock age	34
Figure 5-8	Office Properties in Hertford Town Centre by Age.....	35
Figure 5-9	Office Properties in Ware Town Centre by Age	36
Figure 5-10	Office properties - CoStar building quality score	38
Figure 5-11	Office market rent in Hertford and Ware 2014 Q1 to 2025 Q4 (£/sqm).....	39
Figure 5-12	Historic net absorption of office floorspace in Hertford and Ware and East Herts (2014-2025, sqm)	40
Figure 5-13	Industrial Vacancy Rate (2014 Q1 to 2025 Q4).....	43
Figure 5-14	Warehousing and Storage Vacancy Rate (2014 Q1 to 2025 Q4)	44
Figure 5-15	Industrial market rent Q1 2014 to Q4 2025 (£/sqm).....	45
Figure 5-16	Warehousing and Storage market rent Q1 2014 to Q4 2025 (£/sqm)	46
Figure 5-17	Historic net absorption of industrial floorspace in Hertford and Ware and East Herts (2014-2025, sqm).....	47
Figure 5-18	Historic net absorption of warehousing and storage floorspace in Hertford and Ware and East Herts (2014-2025, sqm).....	48
Figure 5-19	EPC Certificates in Hertford and Ware by use type	50
Figure 5-20	MEES compliance of present EPC certificates with anticipated regulation changes (%) . 51	

Tables

Table 4-1	Economic activity and inactivity (excluding full-time students) (2021).....	17
Table 4-2	Change in economic activity between 2011 and 2021 in Hertford and Ware	18
Table 4-3	Qualification level of residents aged 16 years and over	18
Table 4-4	Employment by industry (2024)	19
Table 4-5	Occupation of residents aged 16 years and over	21
Table 4-6	Business counts by employment size band	21
Table 4-7	Change in business counts (2016 to 2025)	22
Table 5-1	Office properties – buildings and floorspace	25
Table 5-2	Office floorspace in Hertford and Ware (2014-2025)	26

Table 5-3 Office properties - vacancy (2025 Q4)	29
Table 5-4 Office rental values (£/sqm) (2025 Q4)	38
Table 5-5 Industrial and Warehousing and Storage properties – buildings and floorspace (2025 Q4)	41
Table 5-6 Industrial and warehousing floorspace in Hertford and Ware (2014-2025)	42
Table 5-7 Industrial and Warehousing and Storage properties – Vacancy Rate (2025 Q4)	42
Table 5-8 Market rental values – Industrial and Warehousing and Storage (£/sqm) (2025 Q4).....	44
Table 6-1 Overview of Caxton Hill (2025 Q4).....	54
Table 6-2 Overview of Foxholes Business Park (2025 Q4)	54
Table 6-3 Overview of Hartham Lane (2025 Q4)	55
Table 6-4 Overview of Mead Lane (2025 Q4).....	56
Table 6-5 Overview of Mimram Road (2025 Q4)	57
Table 6-6 Overview of Warehams Lane (2025 Q4).....	58
Table 6-7 Overview of Windsor Industrial Estate (2025 Q4).....	59
Table 6-8 Overview of Pegs Lane (2025 Q4).....	60
Table 6-9 Overview of Broadmeads (2025 Q4).....	61
Table 6-10 Overview of Crane Mead (2025 Q4)	62
Table 6-11 Overview of Ermine Point / Gentlemen’s Field (2025 Q4)	63
Table 6-12 Overview of Marsh Lane (2025 Q4)	64
Table 6-13 Overview of Park Road / Harris’s Lane (GSK Ware) (2025 Q4)	65
Table 6-14 Overview of Oakley Horseboxes (2025 Q4)	67
Table 6-15 Overview of Thundridge Business Park (2025 Q4).....	68
Table 6-16 Overview of Hertford Town Centre	70
Table 6-17 Overview of Ware Town Centre.....	71
Table 7-1 Employment density assumptions.....	73
Table 7-2 Estimate of FTE Jobs Generated by the Development of Vacant Land at North and East of Ware	74
Table 7-3 Estimate of FTE Jobs Generated by the Development of Vacant Land at the Mead Lane Area.....	75
Table 7-4 Estimate of Additional FTE Jobs Generated through the Hertford Logistics Hub	75
Table 7-5 Summary of Potential Employment Generated by Vacant Land and Pipeline Supply.....	75
Table 8-1 Conclusions and Recommendations.....	82

1. Executive Summary

1.1 Study Context

- 1.1.1 AECOM was commissioned by East Herts District Council to deliver an Employment Study for Hertford and Ware.
- 1.1.2 The Employment Study forms part of the evidence base to underpin the review of the East Herts District Plan and will support with determining future planning applications.

1.2 Policy and Strategic Context

- 1.2.1 The National Planning Policy Framework (NPPF) provides overarching guidance on the Government's development aims and describes the Government's vision for building a strong, competitive economy. It emphasises that Local Plans should present robust evidence to support clearly defined designations and allocations of land for employment uses. Furthermore, the need for an evidence base to assist in understanding existing business needs, local circumstances and market conditions is also emphasised in the national Planning Practice Guidance (PPG). Whilst this Study is not an economic needs assessment and therefore does not need to align with this guidance, it is relevant for consideration in the context of understanding employment needs in Hertford and Ware.
- 1.2.2 At the local level, the District Plan identifies Hertford as a Principal Town and a key focus for employment growth within East Herts. Policy HERT6 designates several main Employment Areas – including Caxton Hill, Foxholes Business Park and the Windsor Industrial Estate – with Pegs Lane reserved for E(g) uses. These areas are protected and enhanced under Policy ED1 to support office, industrial and warehousing activities. The Plan also promotes regeneration at Mead Lane (Policy HERT2), incorporating new employment floorspace within mixed-use development.
- 1.2.3 For Ware, the District Plan identifies the town as a Minor Town Centre within the wider Hertford-Ware urban area. Policy WARE3 sets out a series of protected Employment Areas, including Broadmeads, Crane Mead and Marsh Lane, while Policy WARE1 allocates approximately 3ha of new E(g) employment land as part of a strategic urban extension to the north-east of the town (WARE2).
- 1.2.4 Across both settlements, wider Plan objectives emphasise supporting Small and medium sized enterprise (SME) growth, promoting sustainable travel, and ensuring employment development is delivered alongside required infrastructure (Objectives 5, 6 and 10). Policies DPS1, DPS2, ED1 and ED2 collectively ensure the retention, enhancement and sustainable expansion of employment land across the Hertford and Ware urban area.
- 1.2.5 To incorporate the site allocation WARE2, the study area includes the rural area to the north east of Ware, which includes the villages of Thundridge, Wadesmill, High Cross and Wareside. District Plan Policy VILL2 identifies these as Group 2 Villages, which are small settlements where limited infill development together with small-scale employment, leisure and community uses will be permitted.

1.3 Socioeconomic Profile

- 1.3.1 The socio-economic baseline analysis has identified that population growth in Hertford and Ware¹ (7.0%) between 2015 and 2024 is lower than East Herts (8.3%), but higher than the East of England (6.7%), and England (6.0%). The current housing trajectory suggests the potential for 564 new homes associated with approved planning applications. With an average household size of 2.37 in East Herts, this indicatively suggests the potential for an additional 1,337 residents in Hertford and Ware, of which 654 would be expected to be aged

¹ Note: For the purposes of this study, Hertford and Ware is defined as a single area as presented in Figure 4-1.

16 and over and economically active. Moreover, there are a number of planning applications, including the strategic District Plan allocation at Ware, determined that could result in further increases in the resident population.

- 1.3.2 Hertford and Ware has a broadly similar employment profile compared to East Herts and the regional and national picture. Hertford and Ware registers sizable employment in the business administration & support services, and professional, scientific & technical sectors, which are both sectors driving office-based employment. Industrial sectors such as manufacturing and construction are also prominent.
- 1.3.3 Since 2015, there has been a significant increase in employment in the business administration & support services sector in Hertford and Ware, with other increases in employment registered in arts, entertainment, recreation & other services, and property sectors. Conversely, there has been a fall in employment in public administration & defence – linked to Hertfordshire County Council’s decision to relocate most of its services and democratic functions from County Hall in Hertford to its Stevenage campus – as well as the manufacturing and professional, scientific & technical sectors.
- 1.3.4 The vast majority of businesses in Hertford and Ware are classed as micro (defined as companies employing up to nine employees), making up 84.6% of local units. Hertford and Ware has a notably higher proportion of small and medium-sized businesses (10-249 employees) than East Herts. While in line with East Herts overall, Hertford and Ware contains a lower proportion of large businesses (250+ employees) compared with the East of England (0.3%) and England (0.4%).
- 1.3.5 Outward commuter movements from Hertford and Ware exceed inward commuter movement by 497. The main areas of outward commuting are to other parts of East Herts, to Welwyn Hatfield and Broxbourne, and towards London, whilst inward commuting tends to be from within East Herts and from the neighbouring Hertfordshire authorities

1.4 Property Market and Existing Employment Sites

- 1.4.1 There is approximately 355,000 sqm of employment generating floorspace in Hertford and Ware.
- 1.4.2 There are 191 office properties in Hertford and Ware (108,943 sqm of floorspace), representing 48.1% of the total office stock in East Herts. These properties are predominantly concentrated within the town centres, with smaller clusters of activity located to the east of Hertford and south of Ware. Vacancy rates have broadly remained steady over time, with a slight increase during the Covid-19 pandemic and a sharp increase at the end of 2025, driven by the large amount of office space being vacated at Pegs Lane. The office stock is largely characterised by smaller, low- to mid-rise units, many of which were built before 1960, with a lack of purpose built stock.
- 1.4.3 Hertford and Ware attracts higher market rental values for office use classes than East Herts, but lower market rental values than the regional and national averages. This is reflective of the small size of the market and the age, size and quality profile of office stock in the town.
- 1.4.4 The industrial and warehousing and storage market comprises 246,059 sqm of floorspace in Hertford and Ware, ~41% of which is warehousing and storage. The vacancy rate for industrial floorspace in Hertford and Ware is below the regional and national average, reflecting a lack of spare capacity in the market. Warehousing and storage uses have the highest vacancy rate, across all comparator areas, albeit this is broadly in line with accepted frictional vacancy rates and likely linked to vacant units within the new Hertford Logistics Hub, which are currently being marketed as the site redevelopment continues towards completion, with agents noting strong performance with 72% of space being let.
- 1.4.5 Hertford and Ware attracts higher market rental values for industrial and warehousing and storage property types than East Herts, the East of England and England. For warehousing

and storage, the market rental values in Hertford and Ware are also higher than observed in East Herts, East of England and England. This supports the viability of industrial development in Hertford and Ware, with agents noting fewer constraints compared with office development.

1.5 Land Available for Development

- 1.5.1 It is relevant to the development of policy for Hertford and Ware to know how many jobs could be created should vacant land through undeveloped allocations and applications in the planning pipeline come forward for development.
- 1.5.2 Analysis suggests that there are three potential sources of land available for development: the 3 hectares within the development at North and East of Ware (WARE2), a mixed-use development site anticipated to create a new sustainable community which connects and complements the existing town, as outlined in the East Herts District Plan (2018); the mixed use development of the Mead Lane area, with the potential for up to 2,200 square metres of B1 (E(g)) employment floorspace to be developed, as set out in the District Plan; and the completion of Hertford Logistics Hub (3/22/2200/FUL), a scheme comprising 16 Grade A logistics units providing nearly 21,000 sqm of industrial floorspace.
- 1.5.3 The analysis suggests that the development of Land at North and East of Ware, Mead Lane/Land East Of Marshgate Drive and Hertford Logistics Hub could result in the generation of between 345 and 582 FTE jobs across the employment land use classes.

Site	Floorspace		FTE Jobs	
	Low	High	Low	High
Land at North and East of Ware	7,313	14,625	237	474
Mead Lane / Land East Of Marshgate Drive		2,200	43	47
Hertford Logistics Hub		4,576		65
Total	14,088	21,401	345	582

- 1.5.4 If delivered, these jobs would represent growth of 1.3-2.1% on current workplace employment in Hertford and Ware. However, it should be recognised that additional jobs could also be delivered across non-employment uses such as retail, food and beverage and healthcare.

1.6 Conclusions and Recommendations

- 1.6.1 The Conclusions and Recommendations of this Study are summarised below:

Topic	Conclusion/Recommendation
Is it desirable to increase the number of jobs in Hertford and Ware?	<ul style="list-style-type: none"> The analysis has highlighted the challenge associated with the loss of employment land to residential uses in Hertford and Ware, and the potential for future population growth suggests the need to deliver jobs in order to support sustainable development. Demand was found to be robust across the industrial use classes, and a lack of spare capacity and challenges in relation to choice and affordability suggest the need for additional employment land to address supply constraints and to retain/attract businesses in both high value and foundational sectors. Demand is limited for office space; however, there is uncertainty as to whether the vacant floorspace at Pegs Lane will be retained and the age and quality profile of stock presents potential future challenges in retaining occupants and safeguarding stock given future minimum energy efficiency standards. Overall, it was viewed by agents that given the lack of activity and churn in the market, future office development would likely be relatively limited, predominantly through infill

Topic	Conclusion/Recommendation
	development or the refurbishment of existing stock (with minimum energy efficiency standards a potential driver of this).
What sort of jobs could be attracted or developed in Hertford and Ware? Why?	<ul style="list-style-type: none"> • Sectors such as manufacturing and the life sciences were viewed to offer potential, given the current sectoral make-up of the local economy, presence of a strong anchor in GSK and future growth plans associated with the development of the Riverlabs campus. Foundational sectors such as construction trades, food and transportation and storage are also prominent in Hertford and Ware and would be expected to remain key industrial employers in the local area. • Office uses such as business administration and support services and professional, technical and scientific are expected to remain active in the local economy. Agents reflected that office space is predominantly focused on local professional companies, such as accountants and small legal firms, with limited churn in the market as companies remain in their premises over a long period. Accordingly, demand conditions for additional office development are muted. • Conditions to harness opportunities related to AI and data centre development could be realised if appropriate sites exist.
What actions need to be taken to achieve the desired outcomes?	<ul style="list-style-type: none"> • There is a need to provide choice in order to accommodate a range of potential occupiers across light industrial (E(g)(iii), general industrial (B2) and warehousing and storage (B8) uses. • Delivery of small and medium-sized premises (under 2,000 sqm) should be encouraged reflecting the current mix of provision in the town (and generally the District). Foundational sectors were viewed to be at risk given affordability constraints for smaller industrial units, with additional supply offering the potential to free up secondary space to support more cost-sensitive foundational uses. • The Council should safeguard existing sites where possible. • The Council should continue to work proactively with the applicants at Land at North and East of Ware and Mead Lane / Land East Of Marshgate Drive to encourage the delivery of employment floorspace on the site. • The Council should consider the potential for the allocation of additional employment land for industrial and warehousing uses in Hertford and Ware to accommodate identified demand from such occupiers. In considering additional employment land, a number of criteria should be considered, in particular the proximity to, or suitable segregation from, residential uses (given the erosion of some sites next to such uses over time and the potential for some industrial uses to generate significant noise and vehicular movements), and access to the road network (in particular the A10). Further criteria are set out in Section 8.4.8. • The Council should consider the role of more innovative office supply options should applications arise, for instance the co-location of office space alongside other more novel uses and co-working spaces. • The Council should continue to regularly monitor changes to existing and newly delivered employment space to identify evolving occupier/developer patterns and inform any policy responses that will be required. This is important given that some newly delivered employment space may come forward within the E Use class and aforementioned pressure from residential uses. • The Council should review the opportunities to work with landlords and occupiers to improve the energy efficiency of office properties in Hertford and Ware town centres before they become non-compliant with minimum energy efficiency standards, with an estimated 90% of floorspace potentially falling within the scope of tightening regulations by 2030. • Should existing employment land be lost to other uses, or permissions including employment space do not come forward, or are developed for different uses than have been consented, this land or floorspace should be re-provided to a similar or improved quantity and quality specification. An exception could be the Pegs Lane site, whereby the reprovision of a similar quantum of office space would not align with demand conditions without the presence of a large anchor occupier.

2. Introduction

2.1 Study Context

- 2.1.1 East Herts District Council commissioned AECOM to deliver an Employment Study covering the towns of Hertford and Ware.
- 2.1.2 In 2023, the Council agreed to undertake a Review of East Herts District Plan (2018) and the Council is currently updating its evidence base to support the new Local Plan. In line with this, an update of the Hertford and Ware Employment Study is required as part of this evidence base and to support with determining future planning applications.
- 2.1.3 This Study builds on the previous Hertford and Ware Employment Study, delivered in 2016, which established an overall vision and objectives for employment growth in Hertford and Ware. The previous study considered the two towns' existing strengths and future opportunities and wider priorities set out in the Economic Development Vision and Action Plan at the time relating to vibrant town centres; and ensuring that EHDC is a business friendly Council.
- 2.1.4 In this Study, employment land is defined as land with business activities falling under the E(g), B2, and B8 use classes as per the Use Classes Order 1987 (as amended). These include:
- E(g) i) office ii) the research and development of products or processes or iii) any industrial process, (which can be carried out in any residential area without causing detriment to the amenity of the area)
 - B2 – general industrial; and
 - B8 – storage and distribution.

2.2 Approach

- 2.2.1 In order to develop an evidence base to determine the need to support employment in Hertford and Ware, our approach includes a number of key elements:
- Understand the existing situation:
 - Analysis of socioeconomic conditions
 - Assessment of the local commercial property market, informed by desktop research using the CoStar database and conversations with 3 local property market agents;
 - A supply-side assessment of the town's current employment sites informed by desktop research and field surveys undertaken by the Council.
 - Estimate future requirements:
 - Understand the likely future demand for employment space in the town, including through the agent conversations and discussions with Council officers;
 - Identify what level of employment could be supported on existing vacant land and commitments within approved planning applications.
 - Conclusions and recommendations:
 - Set out evidence-based conclusions and recommendations for supporting employment in Hertford and Ware.

2.3 Report Structure

- 2.3.1 This report is structured as follows:
- Section 3 sets out the Policy and Strategic Context.

- Section 4 presents the socio-economic characteristics of Hertford and Ware, compared against the local authority area and wider geographies.
- Section 5 outlines a review of activity in the commercial property market.
- Section 6 provides an overview of the existing employment sites in Hertford and Ware.
- Section 7 identifies the potential employment supported by the land available for employment development in Hertford and Ware.
- Section 8 brings together the findings of each task to provide recommendations and conclusions and outline an overall strategy for development of employment land in Hertford and Ware.

3. Strategic Context

3.1 Introduction

- 3.1.1 The following section provides an overview of the local area and the relevant policy and strategic context to employment and employment land in Hertford and Ware at the national, sub-regional (Hertfordshire), local authority (East Herts) and neighbourhood (Hertford and Ware) level.

3.2 Background Context

- 3.2.1 Hertford is a main town within the East Herts District and serves as the administrative centre for the local authority. Located in the southern part of the District, it occupies a strategic position at the confluence of the Rivers Lea and Beane and is characterised by a historic town centre, significant areas of civic and public activity, and established residential neighbourhoods. The town performs a strong service, retail and employment function, with a concentration of professional services, public administration, education and health uses, alongside a number of established employment areas on the edge of the town centre and along key transport corridors.
- 3.2.2 Hertford benefits from strong transport connectivity. The town is served by two railway stations - Hertford East (providing direct services to London Liverpool Street and, less frequently, to Stratford) and Hertford North (providing services to London Moorgate, with less frequent services to King's Cross) which support its role as a commuter settlement within the wider London-Cambridge corridor. Hertford has comprehensive bus links connecting locally to Stevenage, Buntingford, Bishop's Stortford, and surrounding areas. Key routes include the 310 (Waltham Cross – Hertford), 724 (Heathrow – Harlow), 378/379 (connections to Stevenage), and frequent town shuttles (H1-H6) covering residential areas. The A10 runs to the east of the town, providing north-south connectivity between London and Cambridge, while the A414 provides eastward connections towards Harlow and the M11, and westward towards Hatfield and the A1(M). As a result, Hertford forms part of a well-connected sub-regional network of towns including Ware, Stevenage, Welwyn Garden City and Bishop's Stortford.
- 3.2.3 Ware is a historic riverside town located immediately to the east of Hertford. The town has a well-defined historic core centred on the High Street and the River Lea, with established residential areas and a number of employment locations situated along the river corridor and on the periphery of the settlement. Ware performs an important role as both a residential and employment centre within East Herts, accommodating a mix of industrial, warehousing, office and service-based uses.
- 3.2.4 Ware benefits from a railway station on the Hertford East line, providing direct connections to London Liverpool Street and, less frequently, to Stratford. Ware is also served by several bus routes connecting to Hertford, Stevenage, and surrounding areas. Key routes include the 310 (Waltham Cross – Hertford), 331 (Hertford – Buntingford), 724 (Heathrow – Harlow), and local M-services (M2, M3, M4, M5). The town is located on the A1170 and in close proximity to the A10, to the west, which provides strategic north-south connectivity between London and Cambridge. This accessibility supports commuting flows both into and out of the town, with strong functional relationships with Hertford, Bishop's Stortford, Harlow and London. Both towns are also served by the HertsLynx on-demand bus service, which offers connectivity for residents to local villages and towns in the coverage area.
- 3.2.5 Employment opportunities for residents of Hertford and Ware are primarily located in other areas of East Hertfordshire, Welwyn Hatfield, Broxbourne, and Westminster, City of London, with approximately 24.9% of residents working and living in Hertford and Ware.
- 3.2.6 Both Hertford and Ware are tightly constrained by the Metropolitan Green Belt, which has limited outward expansion and directed growth towards previously developed land and planned urban extensions, such as Land North and East of Ware. Additional constraints,

including river corridors, flood risk and designated environmental assets, further influence the availability and distribution of employment land.

3.3 National Planning Policy/Guidance

National Planning Policy Framework (2024)

- 3.3.1 The National Planning Policy Framework² (NPPF), published in 2024, consolidates the Government's economic, environmental, and social planning policies for England and provides overarching guidance on the Government's development aims. At the heart of the NPPF is a presumption in favour of sustainable development, which the Government states should be seen as a common theme running through plan-making and decision-taking.
- 3.3.2 In relation to the economy and employment land, the NPPF states that planning decisions should help create the conditions in which businesses can invest, expand, and adapt. They should support economic growth and productivity, considering both local business needs and wider opportunities for development. Decisions should also allow an area to build on its strengths, counter any weaknesses, and address any challenges of the future.
- 3.3.3 In addition, the NPPF aims to identify strategic sites for local and inward investment, address potential barriers to investment, allow for new and flexible working practices, and enable a rapid response to changes in economic circumstances.
- 3.3.4 The NPPF has introduced a number of reformed policies. Chapter 6: 'Building a strong, competitive economy' sets out that planning policies and decisions should "*pay particular regard to facilitating development to meet the needs of a modern economy, including by identifying suitable locations for uses such as laboratories, gigafactories, data centres, digital infrastructure, freight and logistics*'. Locational requirements of sectors are highlighted and with regard to clusters of knowledge and data-driven, creative or high technology industries that "*new, expanded or upgraded facilities and infrastructure that are needed to support the growth of these industries*' are made provision for in planning policies. Provision should also be made for the '*expansion or modernisation of other industries of local, regional or national importance to support economic growth and resilience.*'

Draft National Planning Policy Framework (2025)

- 3.3.5 The Government is currently consulting on an updated draft of the NPPF, published in December 2025³. It sets out proposed policy changes to unlock more homes and further support commercial development required to drive growth.
- 3.3.6 Chapter 7: 'Building a strong, effective economy' is proposed to replace Chapter 6 of the current NPPF⁴. Key changes include a requirement for decision-makers to give substantial weight to the economic benefits of proposals for commercial development, particularly those supporting improvements in freight and logistics. The chapter also sets out that plans should avoid overly prescriptive requirements on acceptable employment uses, enabling greater flexibility to respond to changing commercial property demands.
- 3.3.7 While the draft NPPF has not yet been adopted, its direction of travel is a material consideration in preparing this Study. The emphasis on giving substantial weight to commercial development proposals, and on avoiding overly prescriptive requirements on employment uses aligns with the flexible, evidence-led approach taken in this assessment.

² Ministry of Housing, Communities & Local Government (2024) National Planning Policy Framework

³ Ministry of Housing, Communities and Local Government (2025) National Planning Policy Framework: Plan-making and national decision-making policies. Available at: https://assets.publishing.service.gov.uk/media/697b71c52ff8d10a830d5d4a/Draft_NPPF_December_2025.pdf [Accessed: 03/02/26].

⁴ Ministry of Housing, Communities and Local Government (2025) Proposed reforms to the National Planning Policy Framework and other changes to the planning system. Available at: https://assets.publishing.service.gov.uk/media/697b6bc6aacd0dc9777b4fd2/December_2025_NPPF_Consultation.pdf [Accessed: 03/02/26].

Planning Practice Guidance (2019)

- 3.3.8 Planning Practice Guidance (PPG)⁵ supports the NPPF and includes guidance on housing and economic needs assessments and housing and economic land availability assessments.
- 3.3.9 Whilst this Study is not an economic needs assessment and therefore does not need to align with this guidance, it is relevant for consideration in the context of understanding employment needs in Hertford and Ware.
- 3.3.10 Guidance on housing and economic needs assessments states that authorities need to prepare an evidence base to understand existing business needs, which will have to reflect local circumstances and market conditions. This includes assessing the best fit functional economic market area (FEMA), existing stock of land for employment uses within the area, recent pattern of employment land supply and loss, market demand and failure, and wider market signals relating to economic growth.
- 3.3.11 For housing and economic land availability assessments, PPG requires local planning authorities to work with other local authorities within the functional economic market area when assessing availability of land. A wide range of sites should be considered including existing sites that could be improved, intensified or changed.

The UK's Modern Industrial Strategy (2025)

- 3.3.12 The UK's Modern Industrial Strategy 2025⁶, published in June 2025 by the Department for Business and Trade, sets out the UK Government's 10-year plan to make the UK the best country to invest in anywhere in the world. It is focused on long-term sustainable growth in the highest potential growth driving sectors which are best placed to create the wealth, jobs, and higher wages needed by communities across the UK.
- 3.3.13 In regard to these highest potential growth driving sectors, eight sectors have been identified that will create the greatest opportunity for the economy and businesses based on existing and emerging strengths. These are: Advanced Manufacturing, Clean Energy, Defence, Digital and Technologies, Creative Industries, Financial Services, Life Sciences, and Professional and Business Services. The resilience of these eight key sectors will be strengthened by supporting the foundational industries and their supply chains which provide vital materials and parts, from steel to chemicals, or manage essential infrastructure, from ports to electricity networks.
- 3.3.14 The East Herts District Plan does not identify specific priority sectors as being concentrated in Hertford or Ware. However, Ware accommodates the District's largest private employer, GlaxoSmithKline, representing a significant Life Sciences presence. Hertford's employment profile is more mixed, with a notable concentration in public administration and office-based activities rather than sector-specific specialisms.

3.4 Local Planning Policy/Guidance

East Herts District Plan (2018)

- 3.4.1 East Herts District Plan (adopted in 2018)⁷ establishes how development will be planned and delivered across East Herts over the period from 2011 to 2033. It sets out the strategy and policies for delivering growth and identifies appropriate areas and sites for development. These policies are then used to shape decisions on planning applications in the district.

⁵ Ministry of Housing, Communities and Local Government (2019). Planning Practice Guidance

⁶ Department for Business and Trade (2025). The UK's Modern Industrial Strategy. Available at:

https://assets.publishing.service.gov.uk/media/68595e56db8e139f95652dc6/industrial_strategy_policy_paper.pdf [Accessed: 30/01/26].

⁷ East Herts Council (2018). East Herts District Plan 2018.

- 3.4.2 The District Plan highlights 10 strategic objectives to form the basis of the policies, relating to climate change, community, housing, design, education and employment, accessibility, provision of facilities, health and wellbeing, biodiversity and infrastructure.
- 3.4.3 Objectives relevant to Hertford and Ware and employment land within Hertford and Ware include:
- Objective 5 – *‘To foster entrepreneurial endeavour through educational attainment and encourage small and medium enterprises through maximising existing employment opportunities and clusters’;*
 - Objective 6 – *‘To improve access opportunities, minimise the need to travel, and encourage necessary journeys to be made by sustainable means to ease congestion and help reduce East Herts’ carbon footprint’;* and
 - Objective 10 – *‘To ensure that development occurs in parallel with provision of the necessary infrastructure, including enhancement and provision of green infrastructure.’*
- 3.4.4 Chapter 7 of the East Herts District Plan focuses specifically on Hertford and sets out the development strategy for the town. As a Principal Town, Hertford is identified as a focus for housing, employment and retail growth within the District. Policy HERT6 designates the main employment areas within the town, including Caxton Hill; Foxholes Business Park; and Windsor Industrial Estate (Ware Road). Pegs Lane is designated as an Employment Area reserved primarily for E(g) uses. In accordance with Policy ED1 (Employment), these areas are protected and enhanced to support office, industrial and warehousing uses. The Plan also supports regeneration at Mead Lane (Policy HERT2), including the provision of new employment floorspace as part of a mixed-use redevelopment.
- 3.4.5 Chapter 9 of the District Plan focuses on the development strategy for Ware. Ware is identified as a Minor Town Centre forming part of the Hertford and Ware urban area. Policy WARE3 designates a number of Employment Areas within the town, including Broadmeads; Crane Mead; Ermine Point/Gentleman’s Field; Marsh Lane; Park Road/Harris’s Lane; and Star Street. These areas are protected under Policy ED1 for B-class uses. Policy WARE1 confirms that Ware will accommodate at least 1,000 homes to the north east of the town, alongside 600 sqm of retail floorspace and approximately 3 hectares of E(g) employment land. This allocation integrates new employment provision within a wider mixed-use urban extension.
- 3.4.6 Policy DPS1 highlights that across the plan period, East Herts District Council will provide a minimum of 10,800 new jobs, 19-20 hectares of new employment land for a mix of B class uses and an additional 7,100 sqm of convenience and 5,700 sqm of comparison retail floor space.
- 3.4.7 Other policies in the East Herts District Plan of relevance to Hertford and Ware and employment land include:
- Policy DPS2 The Development Strategy 2011-2033 – The strategy of the District Plan is to deliver sustainable development in accordance with sites within a number of urban areas, including Bishop’s Stortford, Buntingford, Hertford, Sawbridgeworth and Ware;
 - Policy ED1 Employment – The District Plan makes land allocations for industry within designated employment areas, comprising a mix of use classes B1 (now E(g)), B2 and B8. The provision of new employment uses should be flexible in design, able to respond to the changing needs, be energy efficient, have fully integrated communications technology and be accessed by sustainable transport modes; and
 - Policy ED2 Rural Economy - Proposals for creating new employment generating uses or supporting the sustainable growth and expansion of existing businesses in rural areas will be supported where they are appropriately and sustainably located and do not conflict with other policies within the District Plan.

New Local Plan

- 3.4.8 In October 2023, the Council agreed that East Herts District Plan 2018 needs updating and that work should commence on updating the technical studies and other preparatory work required to provide a robust evidence base. Now the Government has published the Local Planning Regulations (2026), the Council will commence formal work on the new Local Plan this year. This Study will provide an updated assessment of the employment market in Hertford and Ware, to consider changes in the local context and provide robust evidence that can inform the emerging Local Plan.

Hertford Bengoe Neighbourhood Plan (2021)

- 3.4.9 The Hertford Bengoe Neighbourhood Area Plan 2019 - 2033 seeks to preserve the area's historical character while supporting a sustainable and balanced community. Although predominantly residential, the Plan recognises the value of small-scale local economic activity and encourages development that enables residents to access services and employment locally.
- 3.4.10 The Plan acknowledges the presence of limited but important local business activity within Bengoe, largely comprising small enterprises and home-based work. It highlights the need to maintain the viability of these dispersed commercial uses and to ensure that new development does not erode opportunities for local employment or reduce the neighbourhood's mixed-use function.
- 3.4.11 The Neighbourhood Plan includes one specific policy relating to business and employment:
- Policy HBB1 – Local Business Development – Supports small-scale, sustainable commercial activity where it is compatible with the area's primarily residential character. The policy encourages local services, home-working, and micro-enterprise, subject to design, amenity, and heritage considerations.

Hertford Kingsmead Neighbourhood Plan (2023)

- 3.4.12 The Hertford Kingsmead Neighbourhood Plan 2019 - 2033⁸ sets out a vision to develop a sustainable, safe and prosperous neighbourhood. The Plan seeks to retain and attract small business ventures wherever practicable in order to promote a mixture of uses and reduce commuting. It recognises the importance of clustering services, employment and housing to create a more self-sustaining neighbourhood.
- 3.4.13 The Plan provides an overview of existing business activity within the Ward, identifying over 100 business, primarily located at Mead Lane Industrial Estate, Dicker Mill, Windsor Industrial Estate and Foxholes Business Park. It highlights concerns regarding the gradual loss of employment premises to residential conversion and the resulting erosion of the local employment base.
- 3.4.14 The Neighbourhood Plan sets out a specific policy for business and employment:
- Policy HKDB1 – Support of Business Development – Supports sustainable proposals for the development or redevelopment of business premises where they enhance employment opportunities, secure long-term business use, or deliver economic and community benefits. The policy expresses a preference for retention of employment uses at Ducker Mill and Foxholes Business Park.

Hertford Sele Neighbourhood Area Plan (2021)

- 3.4.15 The Hertford Sele Neighbourhood Plan 2021 - 2033⁹ establishes a vision to maintain Sele as a sustainable and cohesive community with access to local services and facilities. The Plan recognises the importance of supporting local employment-generating uses to reduce reliance on out-commuting and to maintain neighbourhood vitality.
- 3.4.16 The Plan highlights the need to protect existing local shops, services and small-scale employment premises from loss, particularly where these contribute to the day-to-day

⁸ East Herts Council (2023). Kingsmead Neighbourhood Plan 2019 – 2033.

⁹ East Herts Council (2021). Sele Neighbourhood Area Plan 2018 – 2033.

functioning of the neighbourhood. It supports the reuse of previously developed land and buildings for employment-generating uses where compatible with residential amenity.

- 3.4.17 Employment-related policies support small-scale commercial activity, homeworking and appropriate mixed-use development within the neighbourhood, subject to design and amenity considerations. The overall approach is to maintain and support a modest local employment function within a predominantly residential area, rather than to allocate new strategic employment sites.
- 3.4.18 In October 2023, Hertford Town Council resolved to commence work on a Neighbourhood Plan for the southern area of the town, comprising of Castle Ward, Bengoe South Ward and Hertford Kingsmead West Ward. The Neighbourhood plan area includes a number of employment sites and part of the town centre, so will provide important policy context as it progresses. Currently preparation of the plan is in the early stages, with an initial consultation draft scheduled for later this year.

Castle Plus Neighbourhood Plan

- 3.4.19 East Herts District Council formally designated Hertford Castle Plus as a Neighbourhood Area in July 2024, following an application from Hertford Town Council. The plan area covers the southern part of Hertford, including the town centre, part of Mead Lane and Hertford East Station, and extends out to Hertingfordbury village, Foxholes Farm, Balls Park, Mandeville Road, Horns Mill, Sele Road and the County Hospital area.
- 3.4.20 The Castle Plus Neighbourhood Plan¹⁰ is being prepared by a Community Steering Group of 12 local residents, supported by smaller sub-groups focused on key themes including Businesses and Employment. The plan is currently at an early stage of preparation, with community engagement ongoing.
- 3.4.21 From an employment perspective, the plan area includes a number of significant employment areas, including the Mead Business Centre to the north of the Hertford East railway branch line, and the Caxton Hill industrial estate to the south of Ware Road, which is currently being redeveloped.

Ware Neighbourhood Plan (2023)

- 3.4.22 The Ware Neighbourhood Plan 2021 - 2033¹¹ sets out a vision to strengthen Ware's role as a traditional market town and to support a resilient local economy. The Plan acknowledges the loss of employment space to residential conversion in recent years and identifies the need to protect existing employment sites and encourage new business opportunities.
- 3.4.23 The Neighbourhood Plan identifies the designated Employment Areas within the East Herts District Plan and introduces additional Important Employment Areas within Ware that are considered to contribute significantly to the town's commercial offer. The Plan seeks to safeguard these areas from non-employment uses and to maintain a strong employment base with the town.
- 3.4.24 The Neighbourhood Plan sets out a number of policies for business and employment including the following:
- Policy W9 – Supporting Employment Opportunities – Safeguards designated and Important Employment Areas and supports B2, B8 and E(g) uses, subject to criteria relating to environment impact, amenity and highway capacity; and
 - Policy W8 – Small Business Support – Supports development proposals that foster small, local business activity within Ware town centre and encourages the reuse of buildings to enhance vitality and viability.

¹⁰ Hertford Town Council (2026). Castle Plus Neighbourhood Plan Website. Available at: <https://www.hertford.gov.uk/castle-plus-neighbourhood-area-plan/> [Accessed 03/06/26].

¹¹ East Herts Council (2023). Ware Neighbourhood Plan 2021 – 2033.

Thundridge Neighbourhood Plan (2021)

- 3.4.25 The Thundridge Neighbourhood Plan¹² was approved at a referendum held in May 2021 and is now in force for all planning matters. The plan has been formally adopted and forms part of the East Herts Development Plan. The plan covers the parish of Thundridge, encompassing the villages of Thundridge, Wadesmill and High Cross, which fall within the northern part of the Hertford and Ware study area.
- 3.4.26 In respect of employment, the plan includes three directly relevant policies. Policy THFS3 (Existing Businesses) seeks to protect existing employment uses within the parish, resisting their loss where they make a meaningful contribution to the local economy. Policy THFS4 (New or Expansion of Business Space) supports proposals for new or expanded employment premises where they are of an appropriate scale and character for the rural setting, are compatible with the Green Belt, and do not give rise to unacceptable amenity or highway impacts. Policy THFS5 (Home Working) recognises the importance of home-based working to the rural economy and supports development that facilitates it where there is no adverse impact on residential amenity or the character of the area.

Hertfordshire Economic Strategy

- 3.4.27 The Hertfordshire Economic Strategy 2026-2036¹³, published by Hertfordshire Futures in March 2026, aims to focus on the residents and businesses of Hertfordshire to build a resilient, productive, inclusive and sustainable economy over the next 10 years. The strategy identifies six key sectors across Hertfordshire as central to driving growth across the county, including advanced manufacturing (defence and aerospace), life sciences, agritech, professional and business services, creative (film and TV production), and digital and technology.
- 3.4.28 Five priorities are established, including, of most relevance, Priority 4 'Places and communities thrive', which seeks to ensure the provision of employment space that meets the need of Hertfordshire's key sectors. This emphasises the importance of an adequate and appropriate supply of land for both commercial and residential uses.
- 3.4.29 The strategy highlights the historic loss of employment floorspace between 2008/9 and 2017/8, alongside a continued post-pandemic decline in office space. However, it identifies growing demand for industrial and logistics floorspace despite current capacity constraints. Overall, these shifts in Hertfordshire's commercial property market are recognised as posing risks to future economic growth.

East Herts District Wide Employment Land Review (2026)

- 3.4.30 The East Herts District Wide Employment Land Review (2026)¹⁴ provides an updated assessment of allocated employment land across the district's main settlements, forming part of the evidence base for the emerging new East Herts Local Plan. The review assesses all allocated Employment Areas, identifying significant changes since the previous 2013 review and setting out conclusions and recommendations for each site.
- 3.4.31 For Hertford, the review identifies large-scale change at Foxholes Business Park, which has been redeveloped as the Hertford Logistics Hub (HE02), partial residential encroachment at Mead Lane (HE04), and the vacancy of County Hall at Pegs Lane (HE08) following Hertfordshire County Council's relocation to Stevenage. The review recommends safeguarding all remaining allocated Employment Areas, with targeted amendments to exclude land lost to non-employment uses at Mead Lane and Warehams Lane (HE06).
- 3.4.32 For Ware, significant residential development on employment land at Crane Mead (WA02) is identified as the principal change, alongside other development of non-employment uses at

¹² Thundridge Parish Council (2021) Thundridge Neighbourhood Plan 2018 – 2033. Available at: <https://www.thundridgeparishcouncil.gov.uk/uploads/thundridge-neighbourhood-plan-2018-2033-mar-21.pdf?v=1617999594> [Accessed 04/06/2026].

¹³ Hertfordshire Futures (2026) Hertfordshire Economic Strategy 2026-2036. Available at: <https://www.hertfordshirefutures.co.uk/media/bm1jncz4/hertfordshire-economic-strategy-2026-2036.pdf> [Accessed: 27/04/26].

¹⁴ East Herts District Council (2026) East Herts District Wide Employment Land Review.

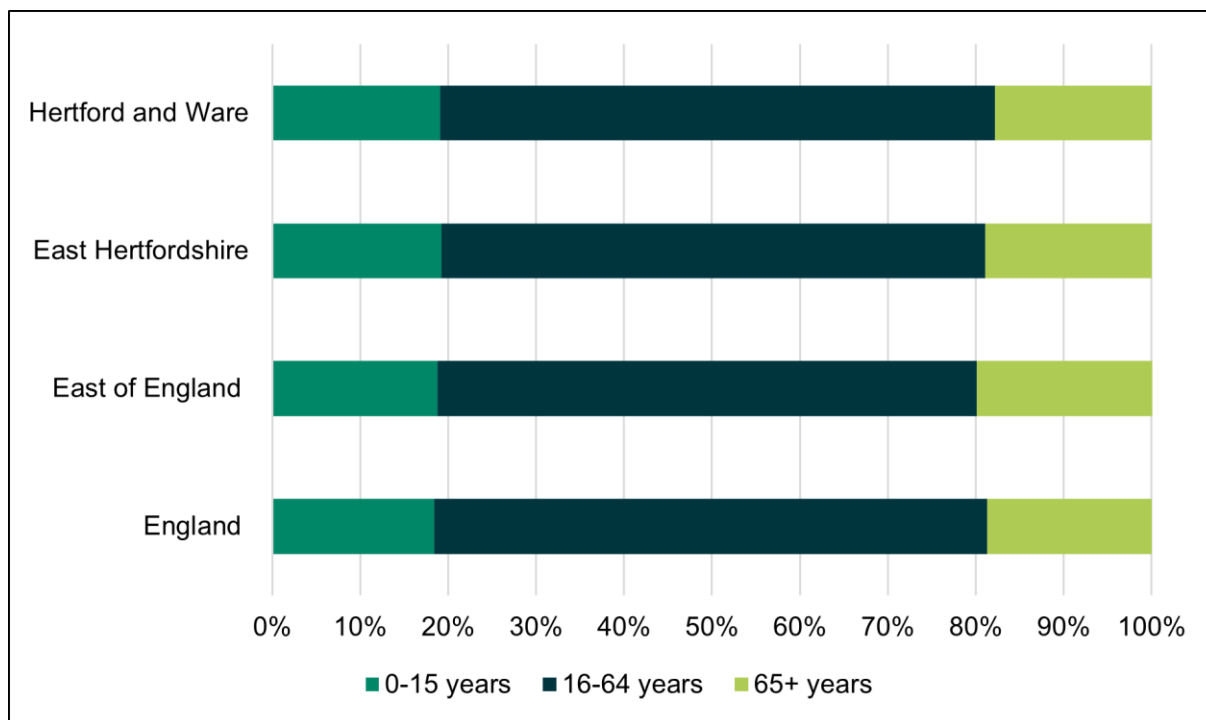
Marsh Lane (WA04). The review recommends safeguarding all remaining allocated Employment Areas, with boundary amendments to exclude land that has changed use. The GSK site at Park Road / Harris's Lane (WA05) is identified as having seen ongoing investment in facilities to support manufacturing, research and development operations.

- 3.4.33 The site assessments in Section 6 of this study draw on the conclusions and recommendations of the Employment Land Review.

than that recorded for East Herts (8.3%), but higher than the rate across the East of England (6.7%), and England (6.0%) over the same time period. Population increases could reflect recent residential development at some of the District Plan allocations in the Study Area.

4.2.2 Figure 4-2 shows the age breakdown of the population in Hertford and Ware, and the comparator areas.

Figure 4-2 Population breakdown by age (2024)



Source: ONS Population Estimates 2024.

4.2.3 Figure 4-2 outlines that in 2024, 63.1% of Hertford and Ware residents were of working age (16 to 64 years), higher than the proportion of residents in East Herts (61.9%), the East of England (61.3%), and England (62.9%). The proportion of the working age population in Hertford and Ware, East Herts, the East of England, and England all decreased from 2015 to 2024, by 0.7%, 1.1%, 0.5%, and 0.7% respectively.

4.2.4 In 2024, residents aged 65 and over comprised 17.8% of the population in Hertford and Ware, indicating a slightly younger population profile compared to East Herts (18.9%), the East of England (20.0%), and England (18.7%). Between 2015 and 2024, the proportion of residents aged 65 and over in Hertford and Ware increased from 16.6% in 2015 to 17.8% in 2024, reflecting a 1.2 percentage point increase. In contrast, there has been slightly higher growth in this age group in East Herts, an increase of 1.4%, but a less noticeable growth in both the East of England and England, with increases of 0.9% in both areas.

4.2.5 Population projections are not available at the Hertford and Ware level. The current housing trajectory suggests the potential for 564 new homes associated with approved planning applications. With an average household size of 2.37 in East Herts¹⁷, this indicatively suggests the potential for an additional 1,337 residents in Hertford and Ware, of which 654 would be expected to be aged 16 and over and economically active.

4.2.6 Moreover, there are a number of planning applications, including the strategic allocation at WARE2, yet to be determined, that could result in further increases in the resident population. Taking these into consideration too would suggest the potential for 2,968¹⁸ new homes in total, and an additional population of 7,034 residents, of which 3,440 would be expected to be aged 16 and over and economically active.

¹⁷ ONS (2022) Census (2021) Household size, local authorities in England and Wales.

¹⁸ It should be noted that 131 of these dwellings are at two sites in High Cross and therefore in a more rural setting than the built-up areas of Hertford and Ware

- 4.2.7 As shown in Table 4-1, the economic activity rate¹⁹ for residents aged 16 and over (excluding students²⁰) in 2021 was 66.0% in Hertford and Ware. This is slightly higher than East Herts (65.7%), and notably above the rate observed in the East of England (61.8%), and England (60.9%). Similarly, the employment rate²¹ in Hertford and Ware (63.7%) also exceeds that in East Herts (63.2%), the East of England (58.8%), and England (60.9%).
- 4.2.8 The unemployment rate in Hertford and Ware was 2.3%, slightly lower than East Herts (2.5%), East of England (3.0%) and England (3.5%).
- 4.2.9 Overall, Hertford and Ware is characterised by high levels of economic activity and employment and low unemployment. Further detail regarding economic activity and inactivity can be found in Table 4-1.

Table 4-1 Economic activity and inactivity (excluding full-time students) (2021)

	Hertford and Ware (number)	Hertford and Ware (%)	East Herts (%)	East of England (%)	England (%)
Economically active (ages 16+)	27,657	66.0	65.7	61.8	60.9
Employment rate (ages 16+)	26,699	63.7	63.2	58.8	57.4
Unemployment rate (ages 16+)	958	2.3	2.5	3.0	3.5
Economic inactivity	13,672	32.6	34.3	40.2	41.4

Source: ONS Census 2021.

- 4.2.10 Since the previous Census in 2011, the economic activity rate in Hertford and Ware has fallen to 66.0% in 2021, from 76.8%. As shown in Table 4-2, this decline has been driven primarily driven by an increase in the retired population, growing by 1.2% in Hertford and Ware. All comparator geographies registered a similar decline in economic activity levels between the two censuses.
- 4.2.11 Despite the slight fall in the proportion of economically active residents between 2011 and 2021, the absolute number of economically active residents increased by 722 in Hertford and Ware, reflecting overall population growth over the past decade. As a proportion, the number of part-time and self-employed workers has increased between 2011 and 2021 by approximately 8.9% and 16.2% respectively, higher than the 3.8% increase in full-time workers.

¹⁹ The Census defines economic activity rate as the proportion of the population aged 16+ who, during the week before the 2021 Census, were either in employment or unemployed but actively seeking and available for work (or waiting to start a job already offered and accepted),

²⁰ The data excluded full-time students from the economic activity rate presented. Individuals in vocational training are captured within the active or inactive categories depending on whether they are also in employment or actively seeking work.

²¹ The Census defines employment rate as the proportion of the population aged 16+ who were in paid work for at least one hour in the week before the 2021 Census or were temporarily away from a job (e.g. on holiday, sick leave or maternity leave).

Table 4-2 Change in economic activity between 2011 and 2021 in Hertford and Ware

Economic activity status	2011	2021	Change (2011 to 2021)
Total economically active	26,935	27,657	722
Full time	16,476	17,108	632
Part time	4,601	5,012	411
Self employed	3,940	4,579	639
Unemployed	1,097	958	-139
Students	821	598	-223
Total economically inactive	8,155	13,672	5,517
Retired	4,190	8,677	4,487
Student	1,281	1,452	171
Looking after family	1,469	1,609	140
Long-term sick or disabled	716	975	259
Other	499	959	460

Source: ONS Census 2021 and Census 2011.

- 4.2.12 According to the 2021 Census, the latest available data at the LSOA level, 86.5% of residents aged 16 and over in Hertford and Ware respectively held some form of qualification, above the rate in East Herts (86.2%), the East of England (81.9%), and England (81.9%). In addition, the proportion of the population holding a qualification in Hertford and Ware increased since 2011, from 82.4%, demonstrating that the population was more skilled in 2021.
- 4.2.13 Among residents of Hertford and Ware, 40.1% held a degree level or equivalent qualification (National Vocational Qualification (NVQ) Level 4+), which is higher than in East Herts (38.6%), and notably above the East of England (31.6%), and England (33.9%) averages. Table 4-3 sets out the qualification level of the study area and comparator geographies.

Table 4-3 Qualification level of residents aged 16 years and over

	Hertford and Ware (%)	East Herts (%)	East of England (%)	England (%)
% with NVQ4+	40.1	38.6	31.6	33.9
% with NVQ3+	16.8	16.8	16.8	16.9
% with NVQ2+	13.6	14.4	14.4	13.3
% with NVQ1+	9.2	9.4	10.8	9.7
% with other qualifications	2.3	7.0	8.3	8.1
% with no qualifications	13.5	13.8	18.1	18.1

Source: ONS Census 2021.

4.3 Local Employment

- 4.3.1 Hertford and Ware has a distinct workplace employment profile as shown in Table 4-4. This section focuses on the sectors that are likely to drive demand across the employment land use classes (E(g)/B).
- 4.3.2 In Hertford and Ware, employment in the business administration and support services industry accounts for the largest share of jobs at 17.8%, higher than East Herts (15.8%), the East of England (10.8%), and England (9.1%). This would be likely to drive demand for E(g) class employment space as an office-based sector. In relation to other sectors driving office-based employment, Hertford and Ware 12.1% of employment in Hertford and Ware is in the

professional, scientific and technical sector. This is greater than the East Herts (10.8%), East of England (7.9%) and England (9.4%) averages. GSK in Ware is likely to be a key driver of employment in this sector.

- 4.3.3 Manufacturing in Hertford and Ware (9.1%) comprise a higher share of employment by industry than East Herts (6.1%), the East of England (7.3%), and England (7.4%). Similarly, construction also comprises a higher share of employment by industry in Hertford and Ware (8.2%), compared to East Herts (7.9%), the East of England (6.9%) and England (4.9%). Both the manufacturing and construction sectors are significant drivers of demand for industrial land and floorspace.

Table 4-4 Employment by industry (2024)

	Hertford and Ware		East Herts	East of England	England
	Number	%	%	%	%
Agriculture, forestry & fishing	10	0.0	1.2	1.7	1.2
Mining, quarrying & utilities	120	0.4	0.9	1.0	1.1
Manufacturing	2,475	9.1	6.1	7.3	7.4
Construction	2,245	8.2	7.9	6.9	4.9
Motor trades	315	1.2	2.3	2.3	1.8
Wholesale	885	3.3	3.6	4.3	3.8
Retail	2,010	7.4	7.9	8.8	8.4
Transport & storage (including postal)	600	2.2	1.6	5.5	5.1
Accommodation & food services	2,020	7.4	8.6	7.9	7.9
Information & communication	795	2.9	3.4	3.5	4.7
Financial & insurance	235	0.9	1.4	2.0	3.3
Property	855	3.1	2.0	1.9	2.0
Professional, scientific & technical	3,290	12.1	10.8	7.9	9.4
Business administration & support services	4,840	17.8	15.8	10.8	9.1
Public administration & defence	755	2.8	2.2	3.4	4.2
Education	2,080	7.6	10.1	8.4	8.3
Health	2,210	8.1	9.4	12.1	12.9
Arts, entertainment, recreation & other services	1,495	5.5	4.7	4.0	4.4
Total	27,235				

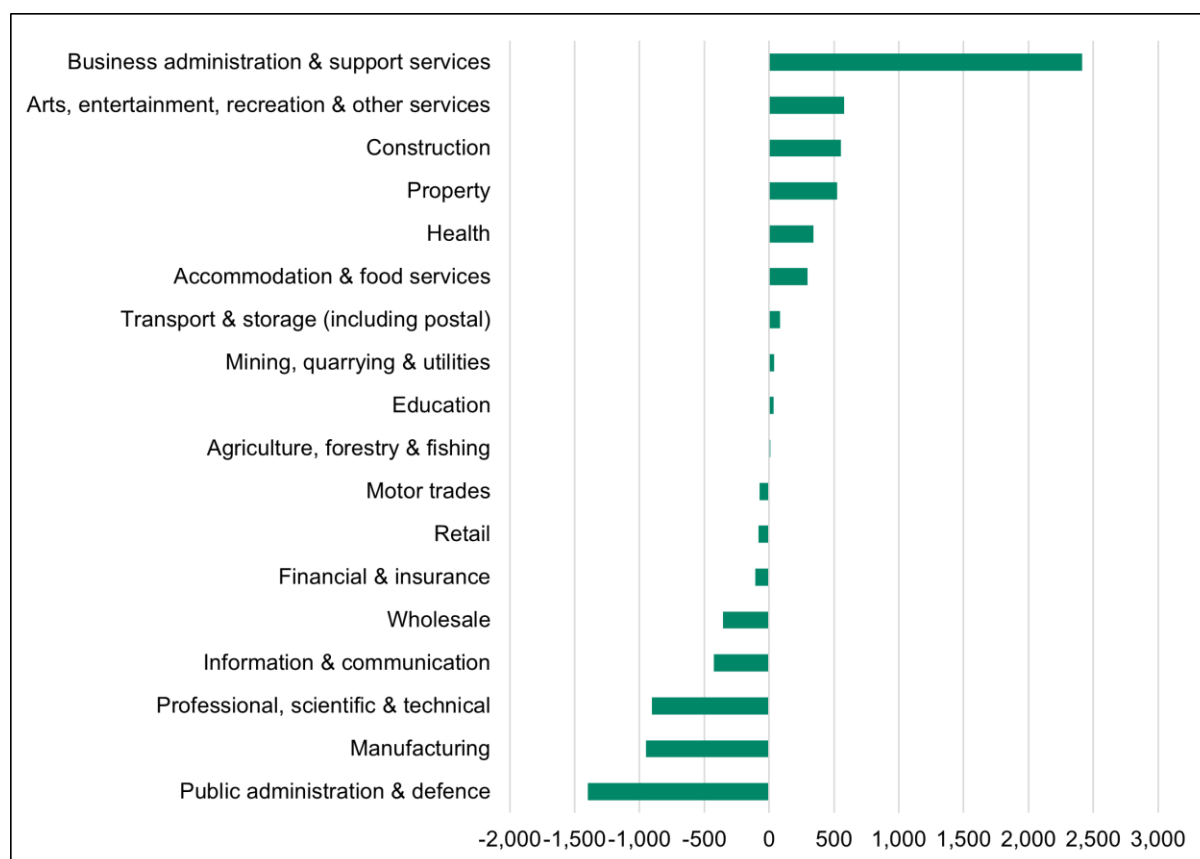
Source: ONS BRES 2026.

- 4.3.4 Over the period 2015 to 2024, workplace employment in Hertford and Ware increased by 585 jobs. There has been a significant increase in employment in the business administration and support services industry in Hertford and Ware, which registered an increase of 2,415 workers over this period. This is reflected in the proportion of employment in the business administration and support services sector rising from 9.1% in 2015 to 17.8% in 2024 in Hertford and Ware. Other notable increases in employment have been registered in the arts, entertainment, recreation & other services, and property sectors in Hertford and Ware.

- 4.3.5 Conversely, there has been a notable fall in employment in the public administration & defence sector in Hertford and Ware, which has fallen from 2,155 to 755 workers. This is reflected in the proportion of employment in the sector, which fell from 8.1% in 2015 to 2.8% in 2024. This is likely to be associated with Hertfordshire County Council's decision to

relocate most of its services and democratic functions from County Hall in Hertford to its Stevenage campus²². Other sectors to register a decline in employment over the period include the professional, scientific & technical sector and manufacturing. The fall in employment in public administration and defence, and the professional, scientific & technical sector in Hertford and Ware is not consistent with regional and national trends over the same time period, which both experienced an increase in the proportion of employment in these sectors. The fall in employment in manufacturing in Hertford and Ware, however, is consistent with regional and national trends. The changes in employment over this period in Hertford and Ware are set out in Figure 4-3.

Figure 4-3 Change in employment in Hertford and Ware 2015-2024



Source: ONS (2025) BRES 2024; ONS (2016) BRES 2015

- 4.3.6 Employment by occupation in Hertford and Ware is broadly comparable to East Herts, as shown in Table 4-5. In general, Hertford and Ware and East Herts outperform the regional and national comparators in traditionally higher skilled occupations, while the proportions of employment in traditionally lower skilled occupations are lower than the regional and national average.
- 4.3.7 The largest occupation category in Hertford and Ware is professional occupations (23.6%), which is a larger share than recorded in East Herts (22.3%), regionally (19.6%) and nationally (20.3%). This is followed by managers, directors and senior officials, with the proportion in Hertford and Ware (17.1%) being lower than East Herts (18.2%), but greater than the East of England (13.7%) and England (12.9%).
- 4.3.8 Conversely, Hertford and Ware, and East Herts have lower proportions of people working in elementary occupations - which consist mainly of simple and routine tasks often requiring the use of hand-held tools and some physical effort - accounting for 6.8%, lower than the East of England (9.9%) and England (10.5%).

²² Hitchin Nub News (2025) Hertfordshire County Council to sell County Hall. Available at: <https://hitchin.nub.news/news/local-news/hertfordshire-county-council-to-sell-county-hall-263502>

Table 4-5 Occupation of residents aged 16 years and over

	Hertford and Ware (%)	East Herts (%)	East of England (%)	England (%)
Managers, directors and senior officials	17.1	18.2	13.7	12.9
Professional occupations	23.6	22.3	19.6	20.3
Associate professional and technical occupations	16.9	15.8	13.3	13.3
Administrative and secretarial occupations	10.0	10.1	9.8	9.3
Skilled trades occupations	9.3	9.3	10.7	10.2
Caring, leisure and other service occupations	7.0	7.7	9.1	9.3
Sales and customer service occupations	5.0	5.4	7.0	7.5
Process plant and machine operatives	4.4	4.5	6.9	6.9
Elementary occupations	6.8	6.8	9.9	10.5

Source: ONS Census 2021.

4.3.9 According to Census data, since 2011 the proportion of the population in Hertford and Ware working in traditionally higher skilled occupations has increased²³. The proportion of the population working as managers, directors and senior officials has increased from 13.7% to 17.1% in Hertford and Ware over the 2011-2021 period. The proportion of the population working in professional occupations has increased from 21.8% to 23.5%. This notable increase in the proportion of higher skilled occupations reflects that in East Herts, the East of England, and across England as a whole.

4.4 Business Demography

4.4.1 ONS UK Business Counts data (local units), as shown in Table 4-6, indicates that the vast majority of businesses in Hertford and Ware²⁴ are classed as micro (defined as companies employing up to nine employees), comprising 84.6% of local units. This is slightly lower than the rates in East Herts (87.5%) and the East of England (85.3%), but marginally higher than the rate across England (84.5%). Hertford and Ware has a notably higher proportion of small and medium-sized businesses than East Herts. While in line with East Herts, Hertford and Ware contains a lower proportion of large businesses compared with the East of England (0.3%) and England (0.4%).

Table 4-6 Business counts by employment size band

	Hertford and Ware (%)	East Herts (%)	East of England (%)	England (%)
Micro (0-9)	84.6	87.5	85.3	84.5
Small (10 to 49)	11.9	10.3	11.9	12.4
Medium (50 to 249)	3.1	2.1	2.5	2.6
Large (250+)	0.2	0.2	0.3	0.4

Source: ONS UK Business Counts 2025 (local units).

4.4.2 The change in business counts from 2016 to 2025 is presented in Table 4-7. Business counts in this section refer to local business units as recorded by ONS UK Business Counts, rather than individual companies, which may operate from multiple locations. The table shows that construction has had the greatest increase in Hertford and Ware by 110 units.

²³ ONS (2012) 2011 Census.

²⁴ Business counts data is not available at LSOA level. Therefore, for this indicator the analysis uses the Middle Layer Super Output Area (MSOA) Study Area adopted in the previous Hertford and Ware Employment Study from 2016. MSOAs consist of groups of approximately 4 to 5 LSOAs and typically contain between 5,000 and 15,000 residents and 2,000 to 6,000 households. It should be noted that the MSOA-based Study Area does not align fully with the current LSOA-defined Study Area and is slightly smaller in extent, particularly excluding land to the north and east of Ware. The MSOAs included in the Study Area are: East Hertfordshire 012, 013, 014, 015, 016 and 017.

The increase in construction business counts has likely driven the rise in self-employment as mentioned in paragraph 4.2.11, as construction and building trades are a prominent industry for sole traders/self-employed. Other sectors to record increases in business counts include property, accommodation & food services, and arts, entertainment, recreation & other services.

- 4.4.3 Conversely, the professional, scientific & technical sector registered the greatest fall in business counts over the period, by 75 units. The information and communication sector also registered a large fall in business counts. This could reflect the increasing hybrid working patterns following Covid-19.

Table 4-7 Change in business counts (2016 to 2025)

Economic activity status	2016	2025	Change (2016 to 2025)
Agriculture, forestry & fishing	10	5	-5
Mining, quarrying & utilities	20	15	-5
Manufacturing	160	125	-35
Construction	320	430	110
Motor trades	50	55	5
Wholesale	125	100	-25
Retail	175	155	-20
Transport & storage (inc. postal)	80	55	-25
Accommodation & food services	110	130	20
Information & communication	250	215	-35
Financial & insurance	60	70	10
Property	110	140	30
Professional, scientific & technical	585	510	-75
Business administration & support services	265	270	5
Public administration & defence	0	5	5
Education	55	40	15
Health	85	80	5
Arts, entertainment, recreation & other services	160	180	20
Total	2,610	2,580	-30

Source: ONS UK Business Counts 2025.

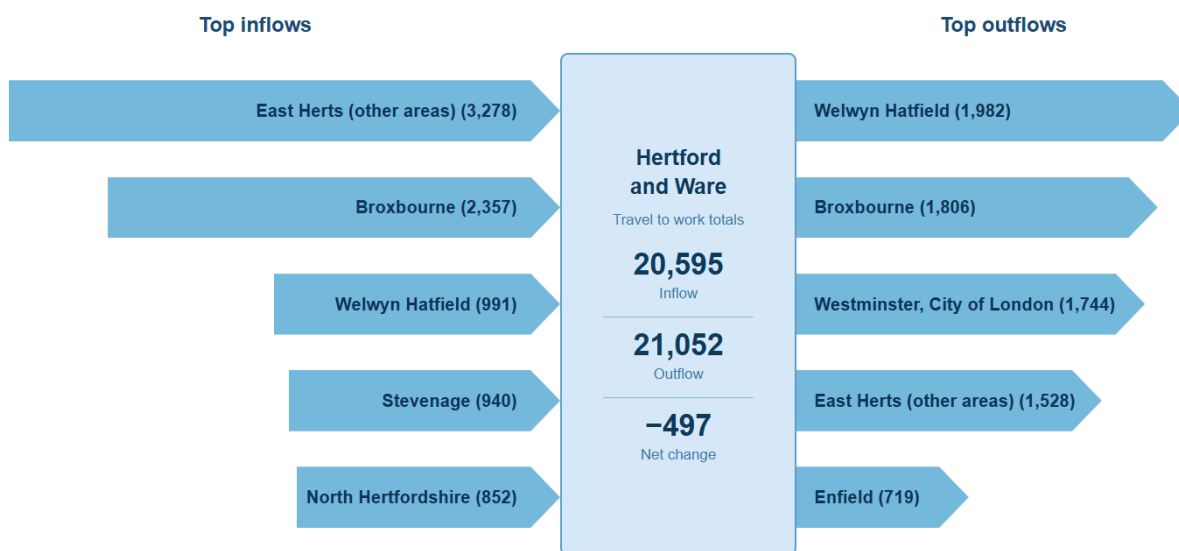
4.5 Commuter Trends

- 4.5.1 Data from the 2011 Census²⁵ showing the location of usual residence and place of work by age is the most recently available data regarding commuter trends for small areas.
- 4.5.2 While the ONS 2021 Census Origin-Destination data has been released, Census 2021 took place during the Covid-19 pandemic, a period of unparalleled and rapid change; the national lockdown, associated guidance and furlough measures will have affected the origin-destination data. Therefore, using these data for planning and policy purposes is cautioned, with Census 2011 likely to be a truer reflection of travel to work patterns, albeit the frequency of journeys may have reduced following the pandemic and the resultant increase in hybrid working.

²⁵ ONS, (2012); Census 2011.

- 4.5.3 At the time of the Census 2011, there were 28,045 people in work who lived in Hertford and Ware, and 6,993 individuals that both lived and worked within the town. This reflects a self-containment rate of 24.9%. As would be expected for a smaller settlement, this is below the self-containment rate of East Herts (49.3%). Commuter outflows from Hertford and Ware totalled 21,052, with key destinations for work including Welwyn Hatfield (1,982), Broxbourne (1,806), Westminster, City of London (1,744), other areas in East Herts (1,528), and Enfield (719).
- 4.5.4 Conversely, Hertford and Ware registered 20,595 commuter inflows for work, with the highest inflows coming from other areas in East Hertfordshire (3,278), Broxbourne (2,357), Welwyn Hatfield (991), Stevenage (940), and North Hertfordshire (852). Therefore, outward commuter movements from Hertford and Ware (21,052) exceed inward commuter movements (20,595) by 497.
- 4.5.5 The top inflows and outflows for Hertford and Ware as described above are illustrated below in Figure 4-4.

Figure 4-4 Hertford and Ware Inflows and Outflows



Source: ONS (2012); Census 2011

Note: Arrow lengths are illustrative and not directly proportional to the number of flows.

- 4.5.6 It would be anticipated that, since the 2011 Census, the number of those living and working in Hertford and Ware (6,993) would have now increased, given the increase in hybrid working accelerated by trends associated with the Covid-19 pandemic, though this effect may be partially offset by the relocation of Hertfordshire County Council from County Hall in Hertford to outside the District in Stevenage, which will have reduced the number of public sector workers both living and working within the area.

4.6 Summary

- 4.6.1 In summary, a number of trends and characteristics are apparent with respect to the socio-economic profile in Hertford and Ware:

- Population growth across Hertford and Ware was lower between 2015 and 2024 than in East Herts, but higher than across the East of England, and England. Hertford and Ware has a higher proportion working age residents compared with all the comparator areas, and a higher proportion of younger residents compared to East of England and England.
- Population projections are not available at the Hertford and Ware level. The current housing trajectory suggests the potential for 564 new homes associated with approved planning applications. With an average household size of 2.37 in East Herts, this

indicatively suggests the potential for an additional 1,337 residents in Hertford and Ware, of which 654 would be expected to be aged 16 and over and economically active. Moreover, there are a number of planning applications, including the strategic site allocation at WARE2, yet to be determined, that could result in further increases in the resident population.

- Hertford and Ware has a higher economic activity rate and employment rate than East Herts, the East of England, and England. The unemployment rate is broadly in line with East Herts, and lower than the East of England, and England as a whole. However, the economic activity rate in Hertford and Ware has fallen significantly since 2011, at 66.0% in 2021, and 76.8% in 2011, primarily driven by an increase in retirement. This is in contrast to the rise in part-time and self-employment within Hertford and Ware by 8.9% and 16.2% respectively, from 2011 to 2021.
- A greater proportion of the population in Hertford and Ware is educated to degree-level or equivalent compared to East Herts, the East of England, and England as a whole. Hertford and Ware also has a lower proportion of residents with no qualifications compared to all other comparator areas.
- The employment profile of Hertford and Ware is broadly comparable to East Herts and the regional and national picture. However, it registers sizable proportions of employment in the business administration & support services, and professional, scientific & technical sectors, well above the comparator areas. These sectors also drive office-based employment. Hertford and Ware also has a higher proportion of people employed in manufacturing and construction sectors, which are key drivers of industrial-based employment.
- Since 2015, Hertford and Ware has seen most notable growth in the business administration & support services sector, with other increases in employment registered in arts, entertainment, recreation & other services, and property sectors. Conversely, there has been a fall in employment in public administration & defence, manufacturing, and professional, scientific & technical sectors across Hertford and Ware.
- The majority of businesses in Hertford and Ware classed as micro. This is higher than the rates in East Herts, East of England, and England. Hertford and Ware has a lower rate of small and large-sized businesses than the comparator areas, and a lower rate of medium-sized businesses than the regional and national proportion, with no large-sized businesses present in Hertford and Ware.
- Outward commuter movements from Hertford and Ware exceed inward commuter movements by 497. The main areas of outward commuting are to other parts of East Herts, to Welwyn Hatfield and Broxbourne, and towards London, whilst inward commuting tends to be from within East Herts and from the neighbouring Hertfordshire authorities. It should be noted that the relocation of Hertfordshire County Council to Stevenage is likely to have increased outward commuting flows from the area in the period since the 2011 Census data. At the time of the 2011 Census, Hertford and Ware had a self-containment rate of 24.9%, though it would be anticipated that this number would have now increased, given the increase in hybrid working accelerated by trends associated with the Covid-19 pandemic.

5. Property Market Assessment

5.1 Introduction

- 5.1.1 This section provides a review of property market indicators in Hertford and Ware. Reference is also made to comparator geographies and wider local authority and regional data. This reflects the fact that the commercial property market in Hertford and Ware is not self-contained and instead forms part of a much wider market area encompassing the whole of East Herts and neighbouring authorities to some extent, varying somewhat by type of floorspace.
- 5.1.2 Data presented in this section is derived from CoStar²⁶ which represents a comprehensive database of up-to-date property market data. Trends are presented where applicable.
- 5.1.3 Commercial properties considered include office (E(g)(i))²⁷, industrial (light industrial (E(g)(iii)), general industrial (B2)), and warehousing and storage (B8) types. It is recognised that there are other property types which may contribute to employment, but these will not be analysed for the purposes of this evidence base.
- 5.1.4 The section is divided into two sub-sections covering the office market (E(g)(i)) and the industrial market (E(g)(iii); B2; B8); providing an assessment of local and sub-regional floorspace by analysing key property market indicators.

5.2 Office Market

- 5.2.1 This section presents the findings relating to the office property market in Hertford and Ware, compared with East Herts, the East of England, and England. Hertford and Ware accounts for 48.1% of office properties within East Herts, with other notable office locations including Bishop's Stortford. Within Hertford and Ware, office properties are primarily concentrated in the built-up areas of the towns, as defined in the East Herts District Plan. Few office properties are dispersed in the rural areas surrounding the built-up areas of the towns.

Buildings and Floorspace

- 5.2.2 According to CoStar and shown in Table 5-1, there are 191 office properties in Hertford and Ware, comprising approximately 108,943 sqm of floorspace. There are 397 office properties in East Herts, comprising around 199,723 sqm of floorspace. Therefore, office properties in Hertford and Ware comprise 48.1% of the office properties in East Herts and 54.5% of the floorspace.

Table 5-1 Office properties – buildings and floorspace

	Hertford and Ware	East Herts	East of England	England
Number of properties	191	397	11,169	111,150
Floorspace (square metres)	108,943	199,723	10,000,000	117,000,000

Source: CoStar (2026).

- 5.2.3 Since 2014, there has been a 1.8% decrease in office floorspace in Hertford and Ware. This is shown in Table 5-2.

²⁶ CoStar (2026). Available at: <https://www.costar.com/news/gb> [Accessed 03/03/26]

²⁷ Note that E(g)(ii) is not covered in this section as CoStar does not return any entries for this use class in Hertford and Ware.

Table 5-2 Office floorspace in Hertford and Ware (2014-2025)

Floor Space Type	Q1 2014	Q4 2025	Change
Office	110,557	108,943	-1,614

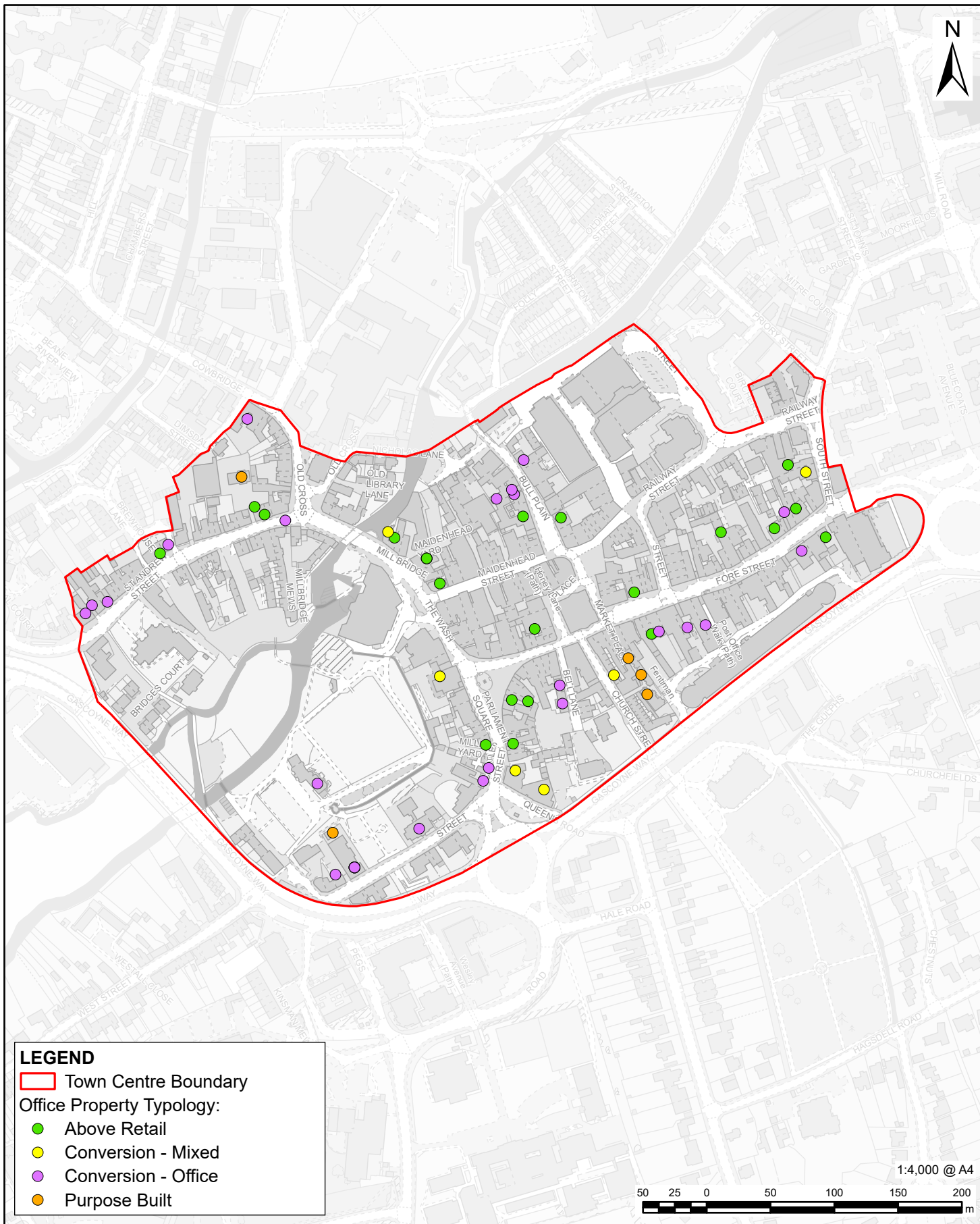
Source: CoStar (2026).

- 5.2.4 Historically towns and cities have provided a wide range of business accommodation, facilitating different types of work and production. These places for work have evolved in line with economic requirements alongside wider infrastructure to support the needs of the community, such as housing, religious buildings, public houses and schools. The economic and cultural ecology of work and employment is constantly evolving. Today the availability of suitable space in many towns and cities to establish and grow businesses is diminishing and there is an ongoing need to build strategic plans that provide suitable spaces to support business retention and growth²⁸.
- 5.2.5 Against this wider context, the following analysis narrows its focus to Hertford and Ware's town centres. This section of the analysis considers the breakdown of office building "typologies" in Hertford and Ware that support employment and reflect the changing ecology of work and employment.
- 5.2.6 As shown in Figure 5-1²⁹, the analysis demonstrates that there is a limited supply of purpose built office stock in Hertford town centre, with much of the town centre stock is provided above retail units and through the conversion of existing buildings, which are often old (many being built before 1960, shown in further detail in Figure 5-8) owing to the historic nature of the town centre.
- 5.2.7 There are fewer office properties in Ware town centre, and Figure 5-2³⁰ shows that supply again tends to be provided above retail units and through the conversion of existing buildings.

²⁸ <https://www.avisonyoung.co.uk/how-can-accessible-workspace-be-designed>

²⁹ Note, the mapping in Figure 5-1, and subsequent town centre mapping, is informed by CoStar data cross referenced with information available from the Valuation Office Agency. In some instances, buildings may be subdivided and the number of markers visible in the figures may not correspond to the total number of town centre properties set out in Section 6.3 and 6.4 of this report.

³⁰ Note, Ware Town Council's offices are identified by the marker assigned to Ware Museum in Figures 5-2, 5-6 and 5-9. This marker is representative of the whole Priory site.



LEGEND

- Town Centre Boundary
- Office Property Typology:
 - Above Retail
 - Conversion - Mixed
 - Conversion - Office
 - Purpose Built

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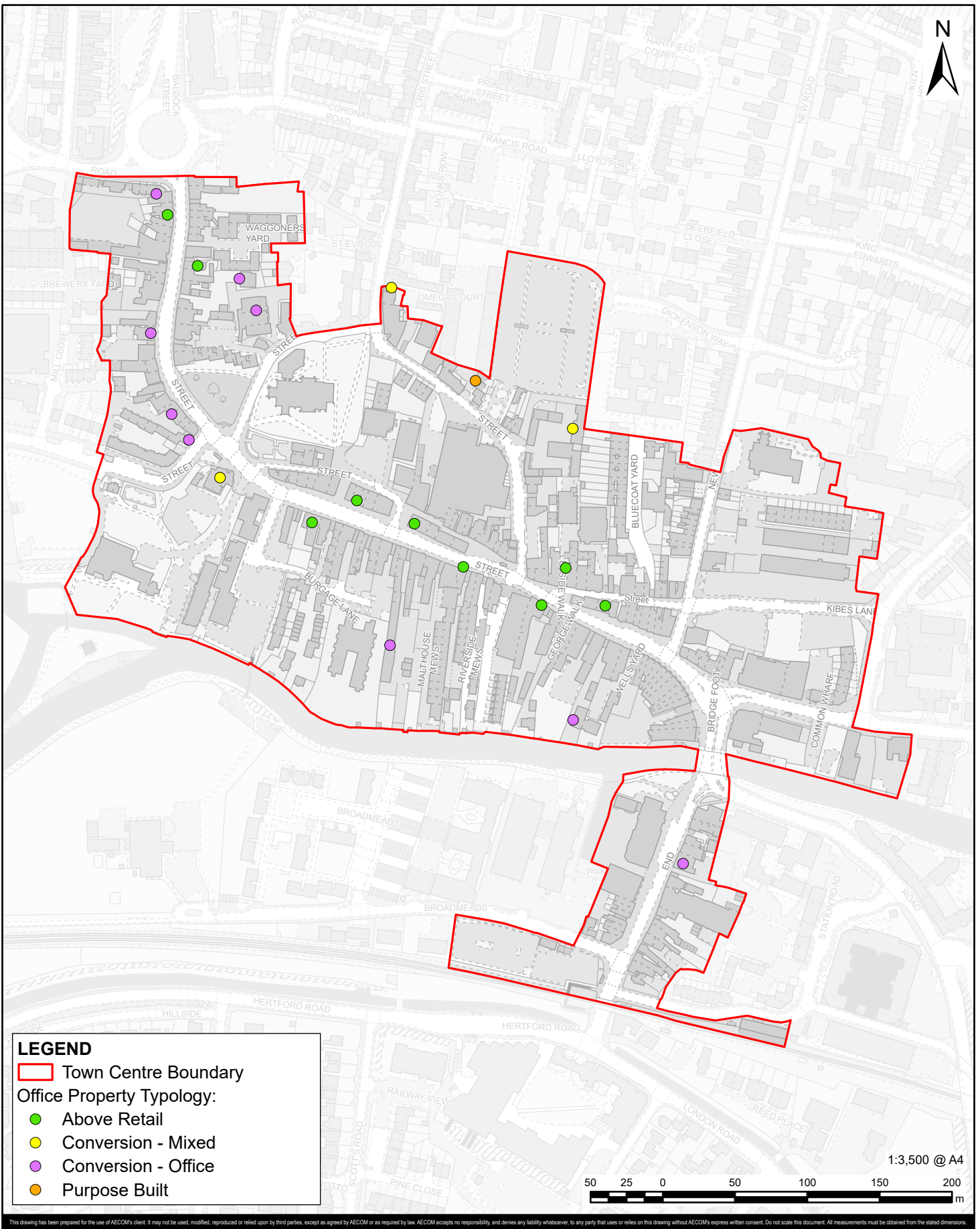
FIGURE TITLE
Office Properties in Hertford Town Centre by Typology

PROJECT NUMBER
60775924

FIGURE NUMBER
Figure 5-1



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LEGEND

- Town Centre Boundary
- Office Property Typology:
 - Above Retail
 - Conversion - Mixed
 - Conversion - Office
 - Purpose Built

1:3,500 @ A4



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FIGURE TITLE
Office Properties in Ware Town Centre by Typology

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FIGURE NUMBER
Figure 5-2



Vacancy

- 5.2.8 As of 2025 Q4, Hertford and Ware has a vacancy rate at 20.8% as shown in Table 5-3, higher than East Herts (13.3%), the East of England (6.4%), and England (8.8%). It should be noted that the vacancy rate for office uses in Hertford and Ware in 2025 Q4 is significantly higher than previous quarters (i.e. 3.6% in Q1, 4.1% in Q2 and 3.0% in Q3) and yearly averages (i.e. 1.2% in 2024, 1.1% in 2023, and 2.6% in 2022). The increase in vacancy rate is driven by a large office space being vacated (comprising 18,859 sqm at Pegs Lane - County Hall). This has also resulted in the vacancy rate in East Herts being elevated compared with previous quarters.
- 5.2.9 However, County Hall is currently being marketed for sale as a major mixed-use redevelopment opportunity, with marketing information indicating that over 12 months of marketing for continued employment use has been undertaken and proved unsuccessful³¹³². Several bids have already been submitted and are being reviewed, further indicating the site is more likely to come forward as a mixed-use development rather than return to the full employment use. Given this, the elevated vacancy rate is likely overstating the volume of office space that will remain available locally over the medium term, as County Hall's redevelopment would significantly reduce the current level of vacant floorspace.
- 5.2.10 Feedback from agents suggests that there is very limited activity in the office market in the towns of Hertford and Ware. Office space is predominantly focused on local professional companies, such as accountants and small legal firms, with limited churn in the market as companies remain in their premises over a long period. While the long term vacancy rate preceding the space at County Hall coming to market was relatively low, feedback has indicated that office space has been converted to other uses such as residential (such as The Rotunda in Hertford, currently under conversion) and not all these premises may have been actively marketed which may have contributed to keeping rates low following the impact of the Covid-19 pandemic.

Table 5-3 Office properties - vacancy (2025 Q4)

	Hertford and Ware	East Herts	East of England	England
Vacancy rate (%)	20.8	13.3	6.4	8.8
Vacant floorspace (sqm)	22,683	25,390	632,776	10,254,308

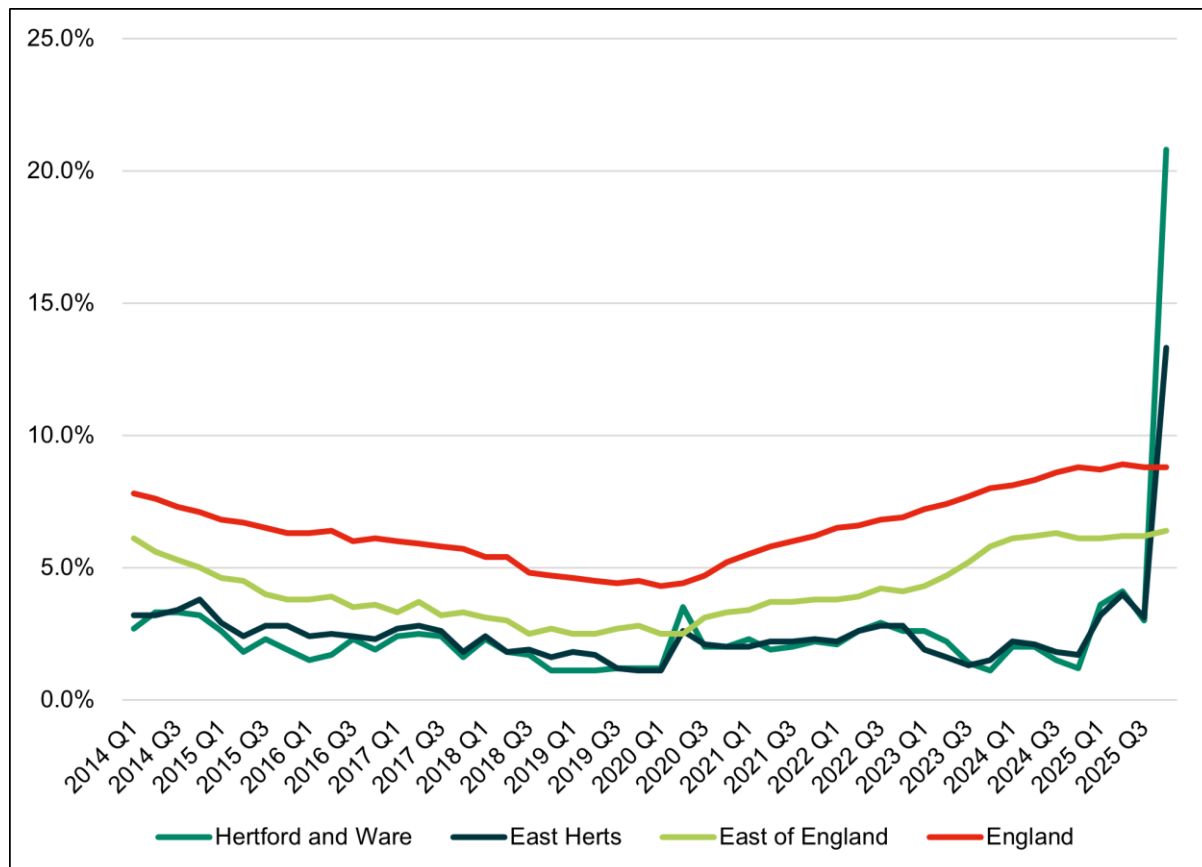
Source: CoStar (2026).

- 5.2.11 Figure 5-3 compares office vacancy rates in Hertford and Ware with East Herts, the East of England, and England overall from 2014 Q1 to 2025 Q4.
- 5.2.12 Vacancy rates in Hertford and Ware and East Herts displayed a relatively steady trend from 2014 Q1 to 2025 Q2, rising briefly in 2020 Q2 in line with the Covid-19 pandemic. However, from 2025 Q3, vacancy rates in Hertford and Ware and East Herts have risen drastically, attributable to approximately 19,000 sqm of office space at Pegs Lane – County Hall being vacated in Hertford and Ware. Prior to 2025 Q3, Hertford and Ware and East Herts recorded lower vacancy rates than both the East of England and England.

³¹ Savills (2026) County Hall, Hertford. Available at: <https://search.savills.com/property-detail/61645ac8-e4cb-48d6-835c-2367246776e1>

³² Royston Crow (2025) County council has received 'a number of' bids for County Hall. Available at: <https://www.royston-crow.co.uk/news/25697923.county-council-received-a-number-of-bids-county-hall/>

Figure 5-3 Office Vacancy Rate (2014 Q1 to 2025 Q4)

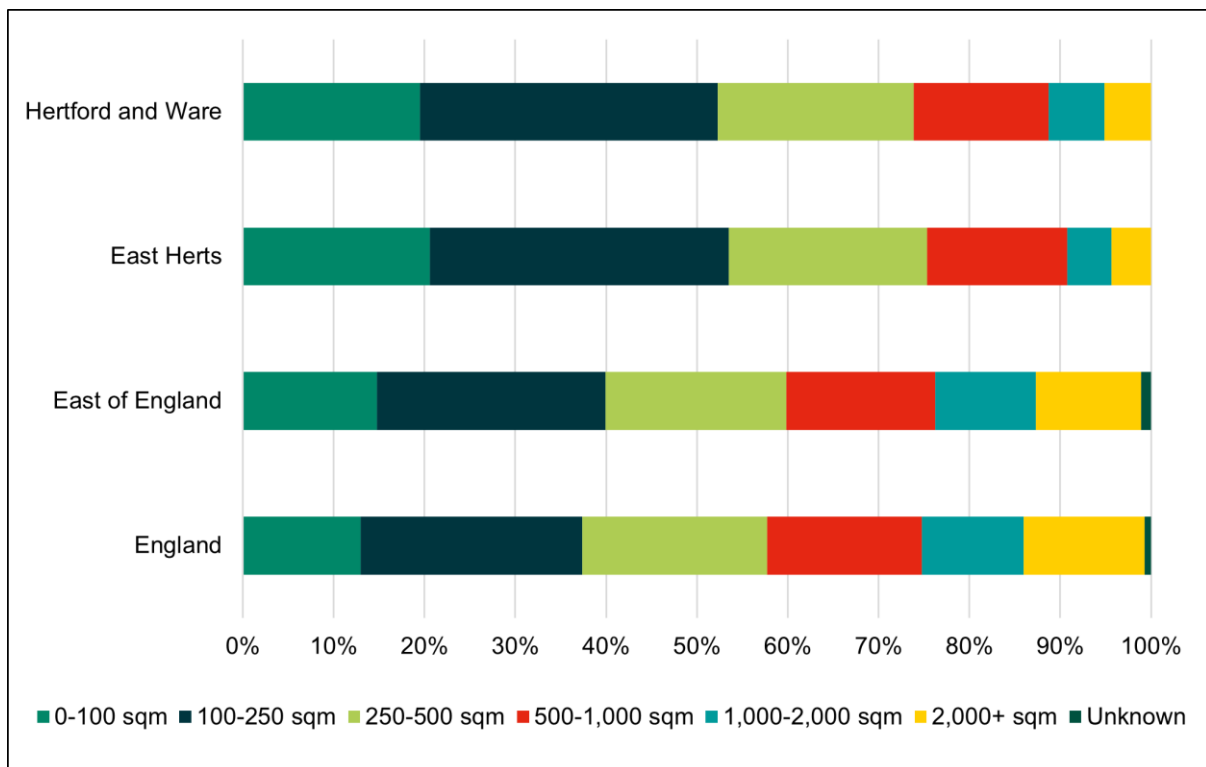


Source: CoStar (2026).

Size

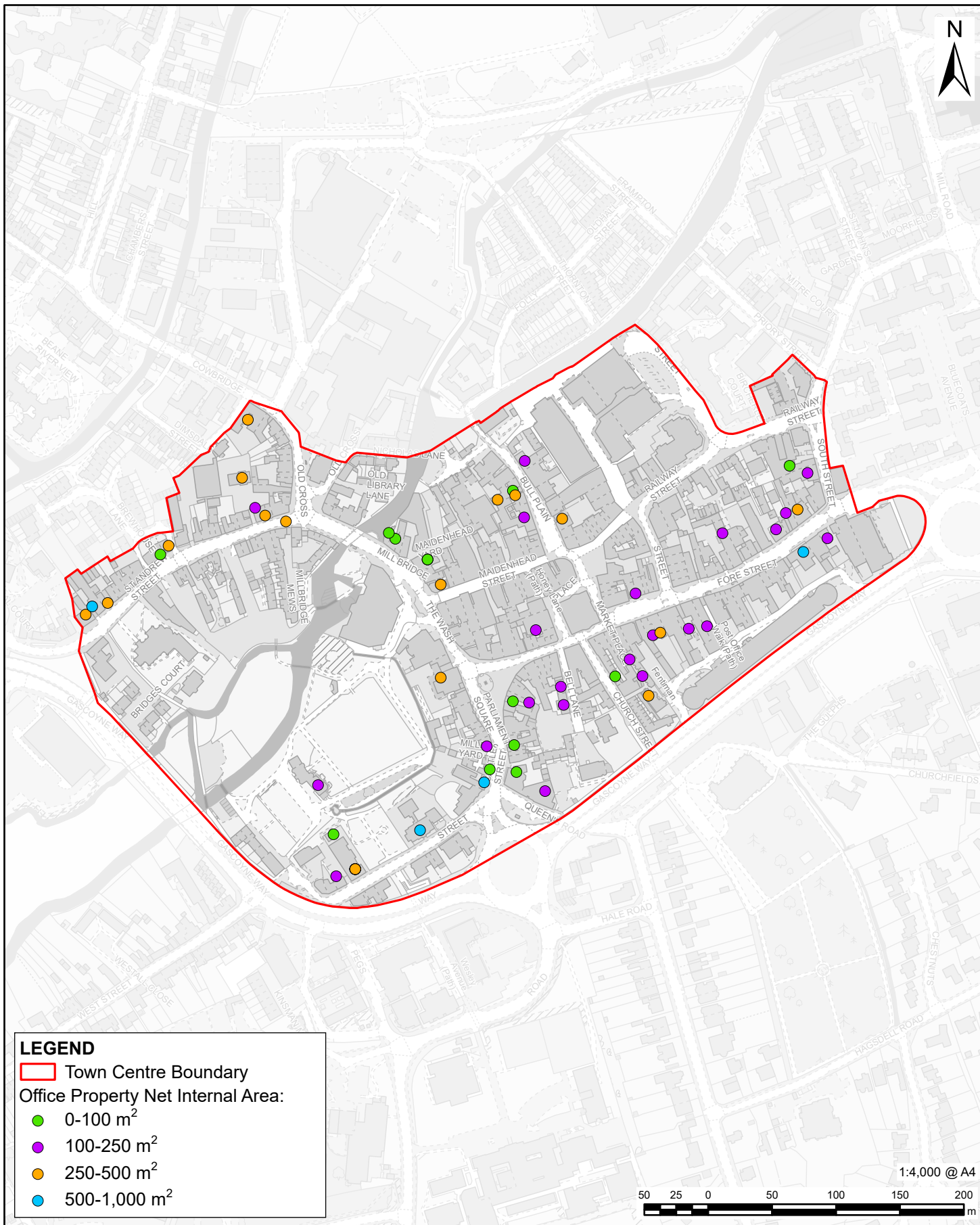
- 5.2.13 Office properties in Hertford and Ware range in size from 6 sqm to 18,859 sqm. In general, office properties in both Hertford and Ware and East Herts tend towards the smaller sizes, with the greatest proportion of properties being between 100 and 250 sqm in size, followed by 250-500 sqm, and 0-100 sqm. In Hertford and Ware, 32.8% of office properties are 100-250 sqm, as shown in Figure 5-4, in line with East Herts (32.9%) but greater than the regional (25.1%) and national (24.4%) averages.
- 5.2.14 Larger office properties in Hertford and Ware (1,000-2,000 sqm and 2,000 sqm+) comprise 11.3% of the total number of office properties, higher than East Herts (9.3%), but considerably lower than the East of England and England averages (22.6% and 24.5% respectively). Key locations include Pegs Lane, Stag House and Foxholes Business Park in Hertford, and Crane Mead Business Park in Ware.

Figure 5-4 Office properties - building stock size



Source: CoStar (2026).

- 5.2.15 Figure 5-5 shows the spatial distribution of office properties by size in Hertford town centre. This highlights that, overall, properties tend to be less than 250 sqm in size. There are only four properties that offer floorspace of above 500sqm, and all are conversions of older buildings.
- 5.2.16 As shown in Figure 5-5, a similar picture is evident in Ware town centre, with the majority of properties falling within the 0-100m and 100-250 sqm size buckets. The only property with floorspace above 500 sqm in Ware Town Centre is The Priory, which houses the town council offices.



LEGEND

- Town Centre Boundary
- Office Property Net Internal Area:
- 0-100 m²
- 100-250 m²
- 250-500 m²
- 500-1,000 m²

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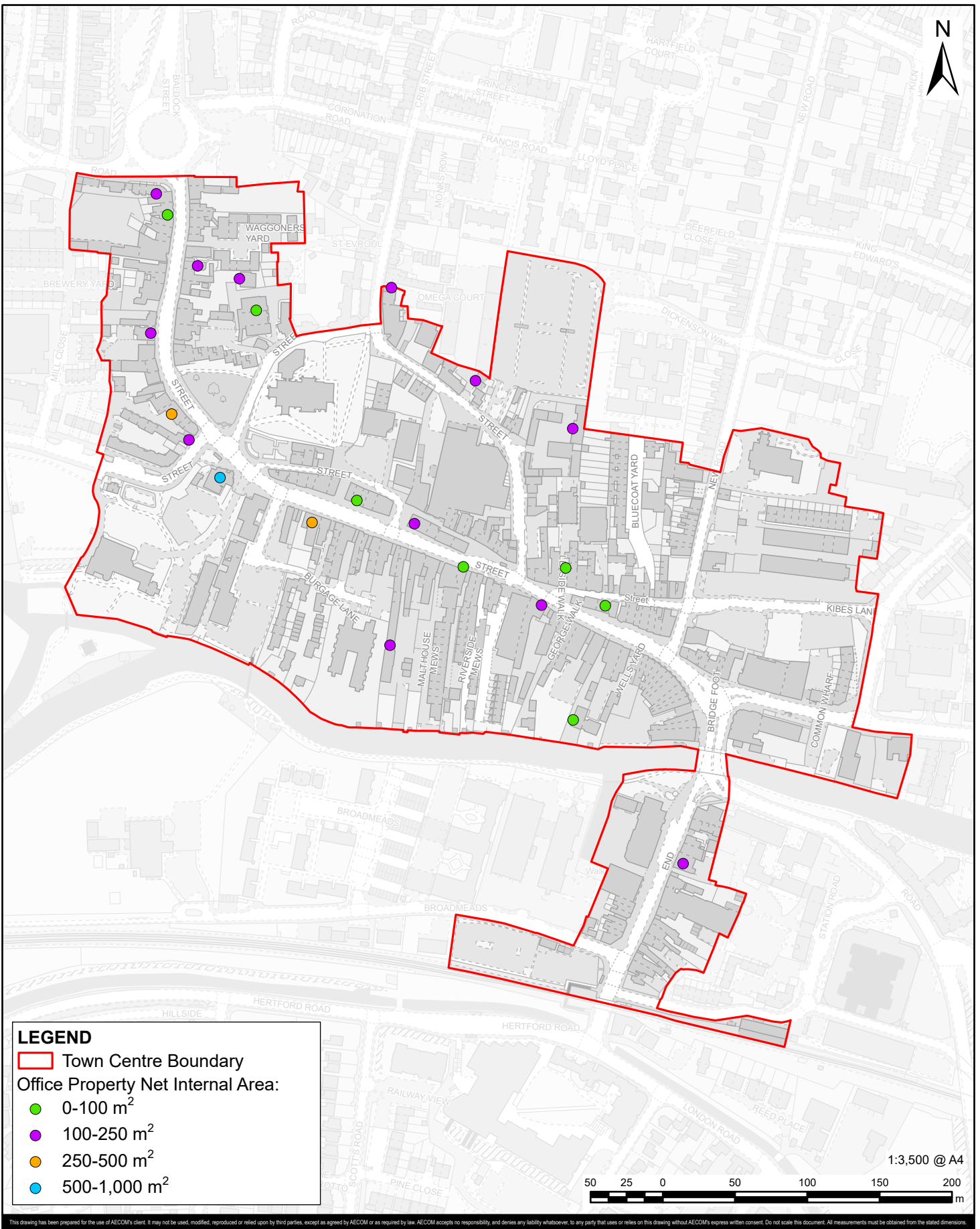
PROJECT
Hertford and Ware Employment Study

FIGURE TITLE
Office Properties in Hertford Town Centre by Size

PROJECT NUMBER
60775924

FIGURE NUMBER
Figure 5-5





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FIGURE TITLE
Office Properties in Ware Town Centre by Size

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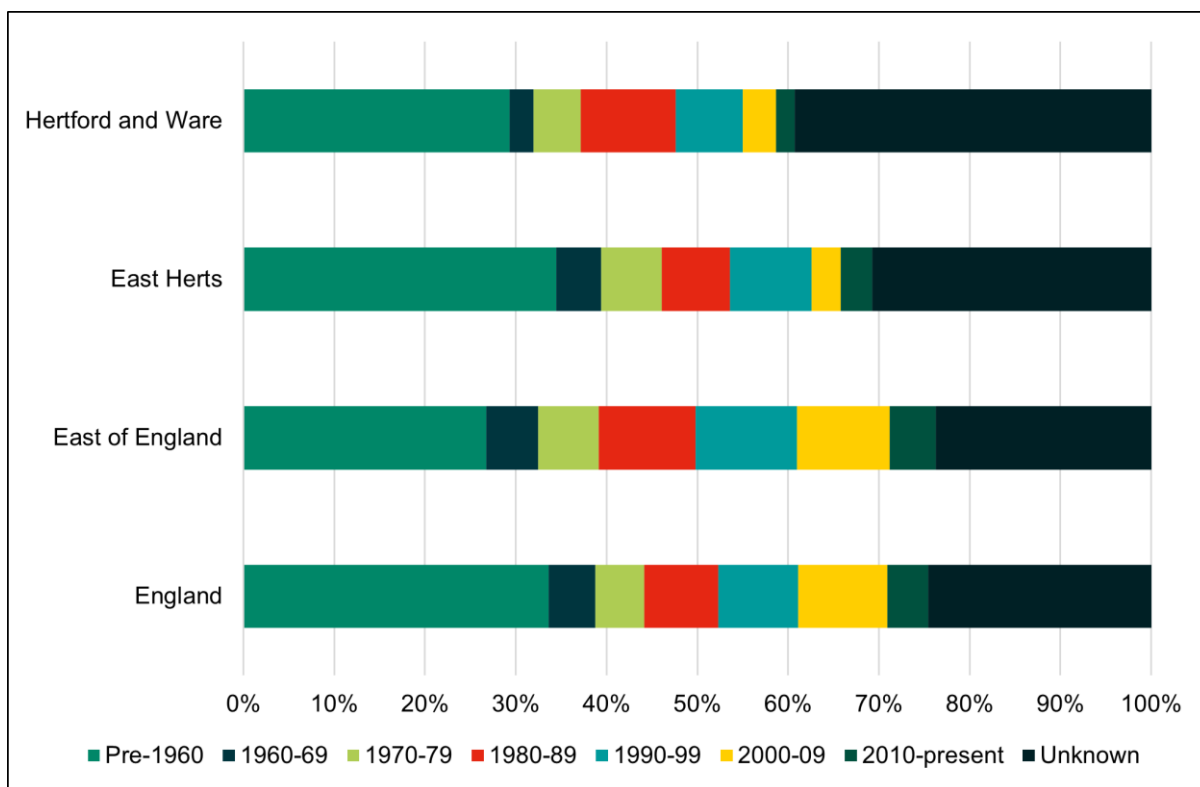
FIGURE NUMBER
Figure 5-6



Age

5.2.17 As shown in Figure 5-7, office properties in Hertford and Ware tend to be old in nature, with 29.3%³³ of offices being built before 1960. However, while this is above the East of England (26.8%), it represents a lower proportion than seen in East Herts (34.5%) and England (33.6%)³⁴. In comparison, modern office development is limited, with only eleven properties in Hertford and Ware being built since 2000, accounting for 5.8% of the total number of properties. This is below the average in East Herts (6.7%), and significantly lower than recorded for the East of England (15.3%) and England (14.3%).

Figure 5-7 Office properties - building stock age

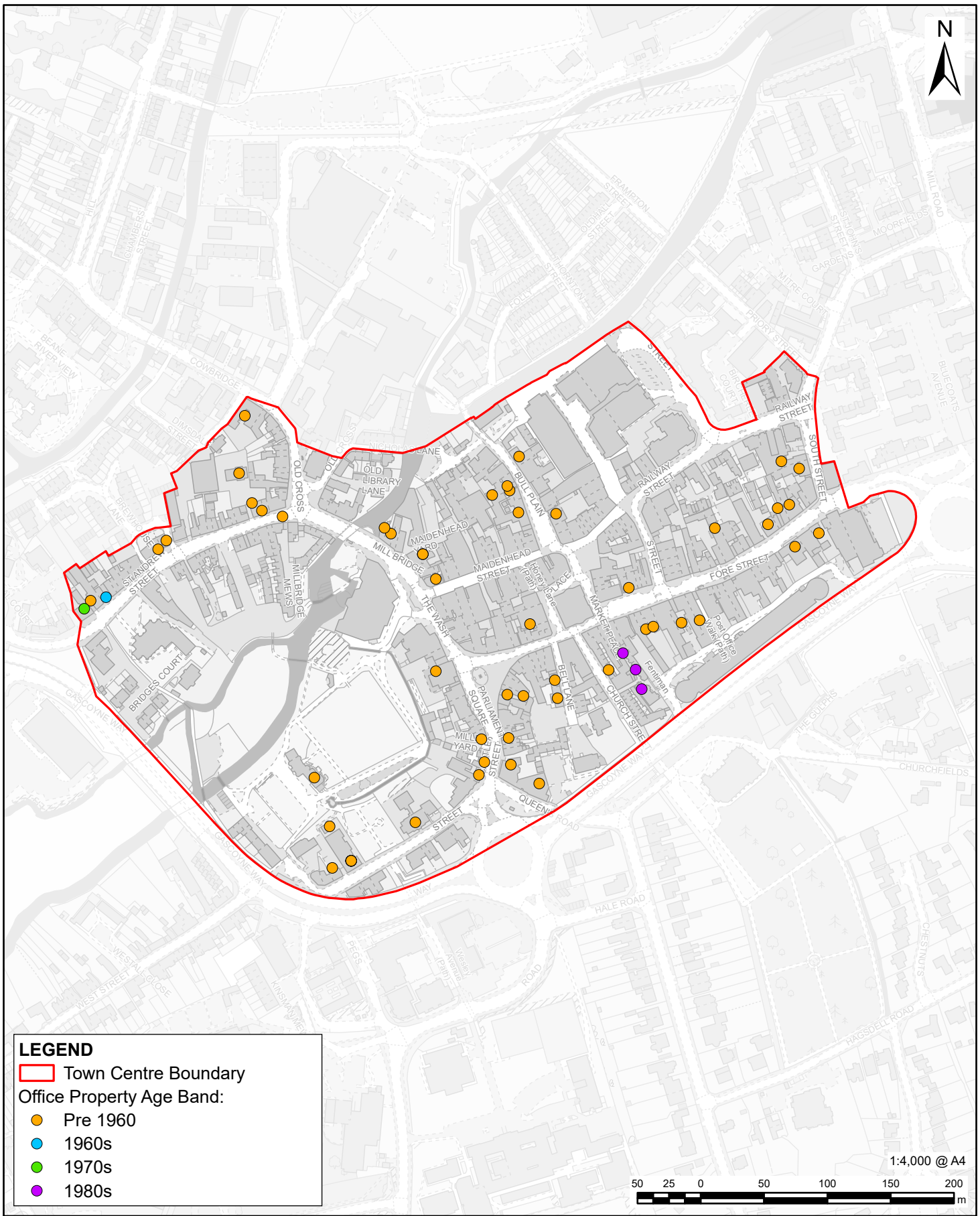


Source: CoStar (2026).

- 5.2.18 Floorspace patterns broadly mirror these trends, with 43.0% of floorspace in Hertford and Ware being built before 1960, compared to 4.7% after 2010. However, Hertford and Ware has a greater proportion of floorspace built before 1960, and a lower proportion of floorspace built after 2010 than East Herts (27.6% and 6.2% respectively). This suggests that in Hertford and Ware, office properties built before 1960 tend to be larger in size than more modern developments. However, this figure is likely skewed by the 18,895 sqm of floorspace at County Hall which was built in 1939.
- 5.2.19 Figure 5-8 shows the spatial distribution of office properties by age in Hertford town centre. The vast majority of properties were constructed before 1960, reflecting the historic nature of the town centre. Just three office properties have been delivered from 1980 onwards.
- 5.2.20 As shown in Figure 5-9, a similar picture is evident in Ware town centre, with the majority of stock being constructed before 1960. However, there is evidence of more modern stock than in Hertford town centre, including a number of units built since the 1990s.

³³ Note that this is a likely underestimate given the high number of properties of Unknown age, as classified by CoStar, many of which would be anticipated to have been constructed pre-1960.

³⁴ It is recognised that the age of a notable proportion of office properties in Hertford and Ware is unknown. This raises the prospect of the proportion of aged stock being higher than the figure presented, with properties of an unknown age more likely to be older, with more limited documentation to determine their age.



LEGEND

- Town Centre Boundary
- Office Property Age Band:
 - Pre 1960
 - 1960s
 - 1970s
 - 1980s

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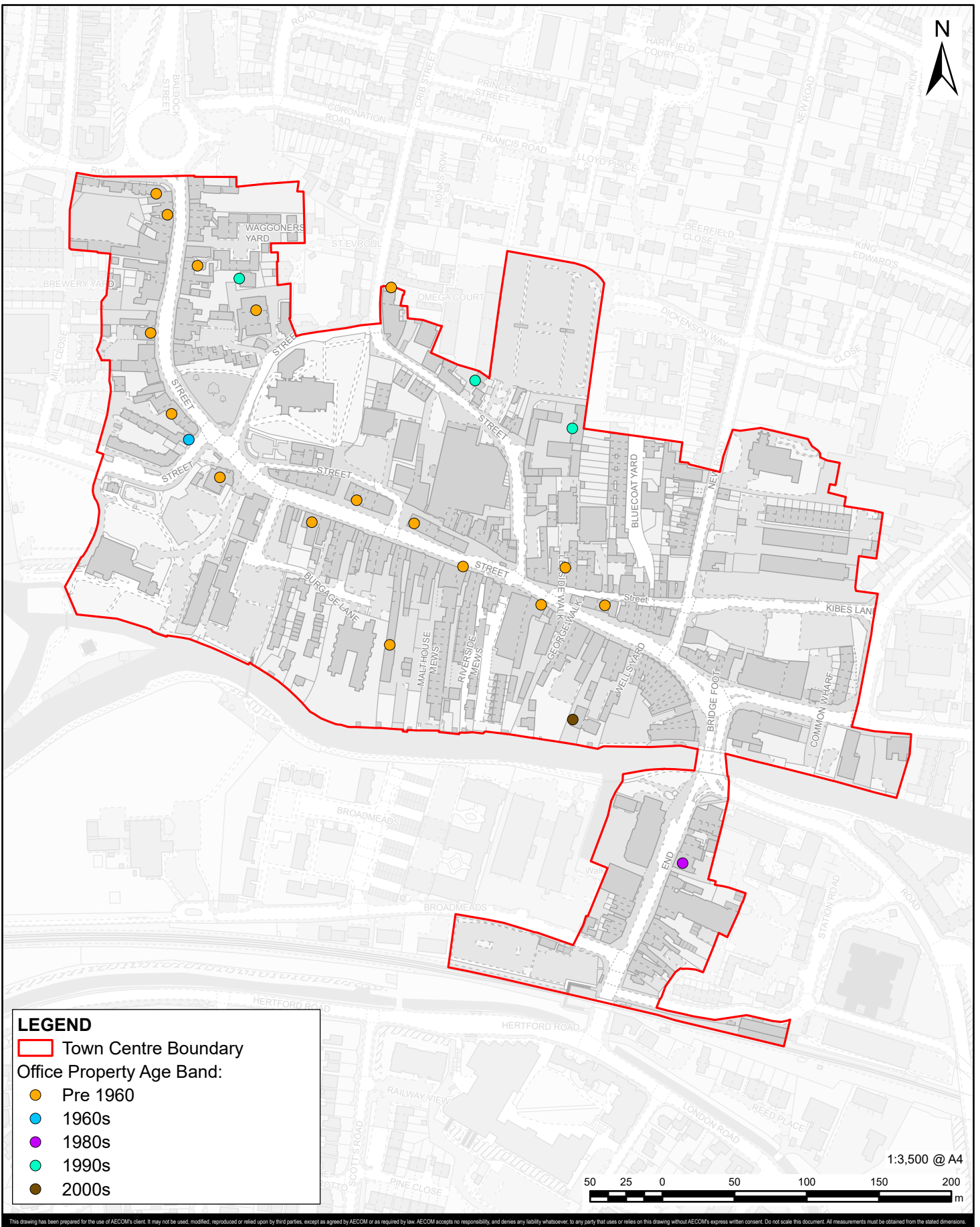
FIGURE TITLE
Office Properties in Hertford Town Centre by Age

PROJECT NUMBER
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FIGURE NUMBER
Figure 5-8



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LEGEND

- Town Centre Boundary
- Office Property Age Band:
 - Pre 1960
 - 1960s
 - 1980s
 - 1990s
 - 2000s

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FIGURE TITLE
Office Properties in Ware Town Centre by Age

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FIGURE NUMBER
Figure 5-9



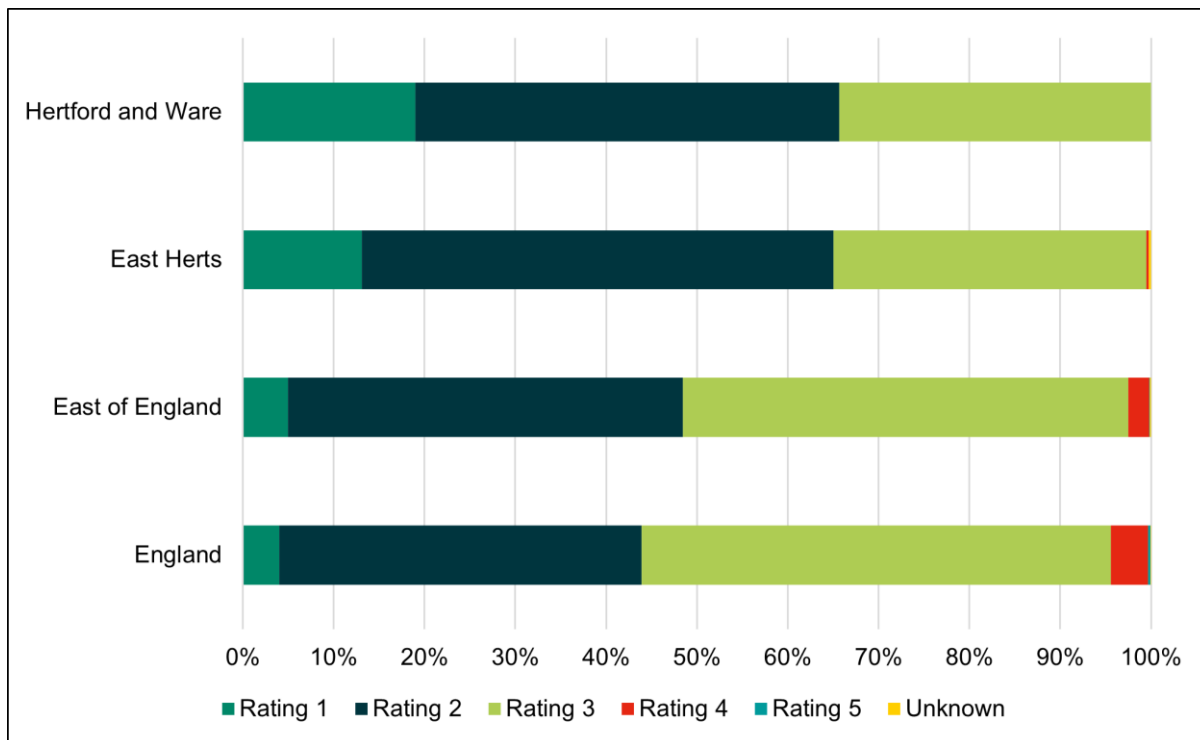
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Condition

- 5.2.21 As shown in Figure 5-10, the condition of office properties in Hertford and Ware broadly aligns with that of East Herts with ~65% of properties receiving a quality score of 1 or 2³⁵.
- 5.2.22 The East of England and England perform more strongly in terms of the condition of office stock, with a greater proportion of office stock receiving a score of 3 or above – 51.5% and 56.0% respectively – compared with Hertford and Ware (34.4%) and East Herts (34.7%). Offices that score relatively highly in Hertford and Ware tend to be more modern or recently refurbished properties in locations such as Foxholes Business Park and Bluecoats Avenue in Hertford and Crane Mead Business Park in Ware.
- 5.2.23 In East Herts, there is one building rated 4 – Innovation House, in Bishop’s Stortford – and none rated 5 (best), showing a lower proportion of office properties with a good condition rating compared to the East of England and England.
- 5.2.24 It is also worth noting that a significant proportion of office stock in Hertford and Ware is concentrated within and adjacent to the historic town centres, where tight spatial constraints limit opportunities to deliver modern, purpose-built office space. As a result, the lower prevalence of higher-quality office buildings is to be expected to some extent.

³⁵ The CoStar Quality Score is a measure of the average condition of building stock according to the CoStar scoring system. The overall average score is according to the average of buildings for which data is available and weighted based on the floorspace of each property. Building stock is rated, based on a number of indicators of quality and amenity, on a scale between 1 (worst quality) and 5 (best quality).

Figure 5-10 Office properties - CoStar building quality score



Source: CoStar (2026).

Rental Values

5.2.25 As set out in Table 5-4, office rental values average £225.74/sqm in Hertford and Ware. Rental values in Hertford and Ware are higher than recorded across East Herts (£210.39/sqm), but lower than across the East of England (£240.44/sqm) and England (£345.97/sqm).

Table 5-4 Office rental values (£/sqm) (2025 Q4)

Property Type	Hertford and Ware	East Herts	East of England	England
Office	225.74	210.39	240.44	345.87

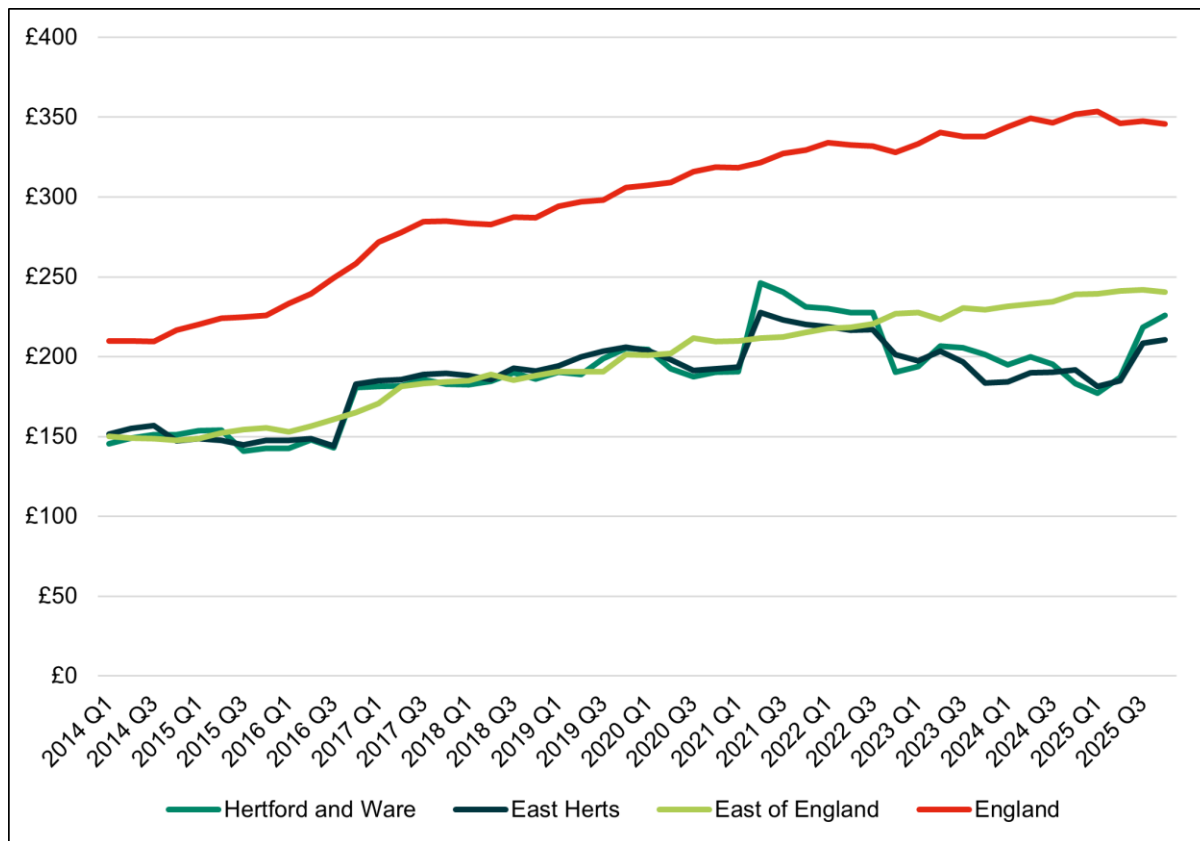
Source: CoStar (2026).

5.2.26 Figure 5-11 presents the change in rental values in Hertford and Ware, East Herts, East of England and England between 2014 and 2025.

5.2.27 Office rental values in Hertford and Ware have broadly plateaued since 2017, a trend reflected in East Herts. Across both areas however, rental values sharply increased in 2021 Q3 before subsequently dropping around 2022 Q3 to values in line with those prior to 2021 Q3. Conversely, both the East of England and England as a whole have seen office rental values increase broadly linearly over the 2014-2025 period, albeit England has seen the higher growth.

5.2.28 As with other locations in East Herts, the low achievable rental values in Hertford and Ware present viability challenges for the delivery of new office floorspace, likely to be overcome only through public sector funding or conditions as part of Section 106 agreements. However, agents noted intervention to support the delivery of new office floorspace would be a risk given the demand profile in the office market, with take-up likely to be muted.

Figure 5-11 Office market rent in Hertford and Ware 2014 Q1 to 2025 Q4 (£/sqm)



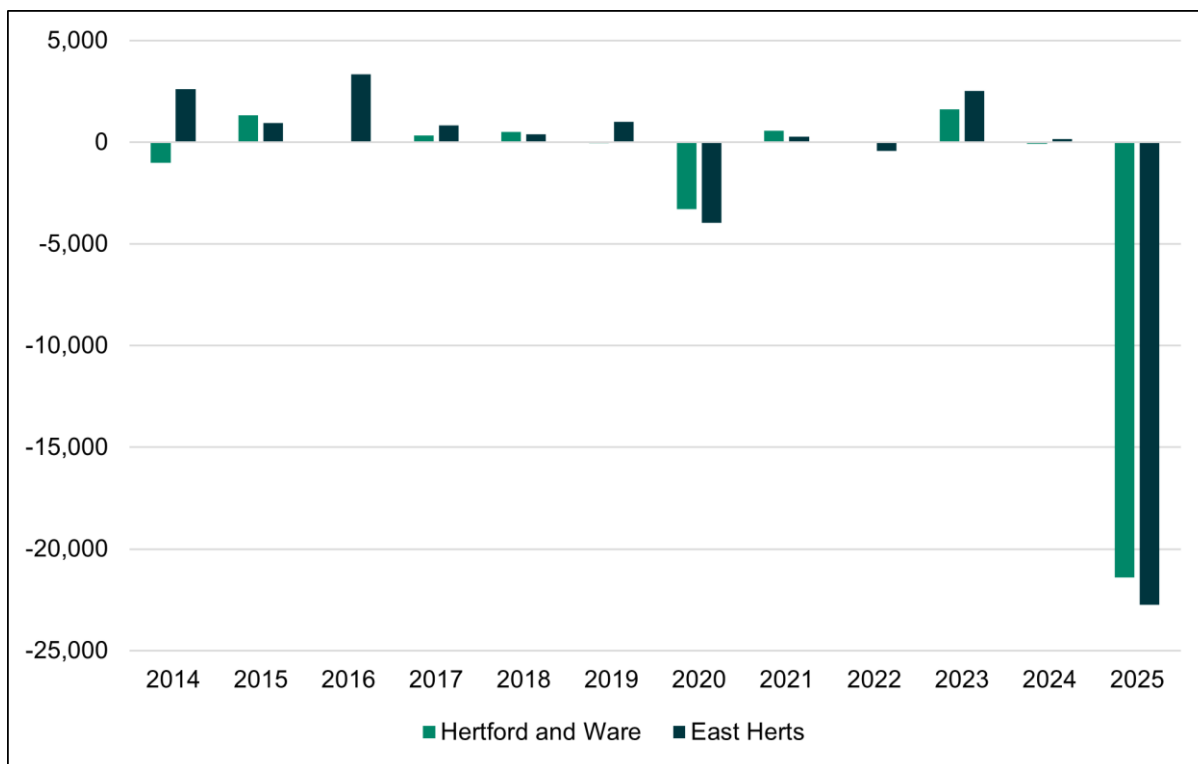
Source: CoStar (2026).

Net Absorption

- 5.2.29 Net absorption provides another angle on demand. The measure expresses the change in the overall quantum of occupied floorspace, typically recorded year on year. Positive annual net absorption means that a greater amount of space has been occupied from a given year to the next. Net absorption is not the reverse of vacancy, as vacancy is an expression of the level of non-occupancy against total stock. In office markets where stock may be in decline, for example due to the conversion of offices to residential use, vacancy may reduce but net absorption would be negative.
- 5.2.30 Figure 5-12 presents the net absorption of office floorspace in Hertford and Ware, and East Herts.
- 5.2.31 Net absorption in Hertford and Ware between 2014 and 2023 was generally positive, rising from -1,013 sqm in 2014 to a peak of 1,629 in 2023, with a negative net absorption also exhibited in 2019 (-31 sqm) and 2020 (-3,301 sqm). From 2024 to 2025, net absorption was negative. Net absorption in 2025 represented the lowest level across the period, at -21,391 sqm., reflecting the increase in vacancy rate outlined above.
- 5.2.32 Between 2014 and 2019, net absorption in East Herts was consistently positive, albeit fluctuating year-on-year, peaking in 2016 at 3,335 sqm. From 2020 onwards, net absorption became more volatile and more modest, reflecting changes in the office property market since the Covid-19 pandemic. While 2023 recorded a positive net absorption of 2,536 sqm, this fell to 154 sqm in 2024. The lowest level of net absorption across this period was recorded in 2025, at -22,729 sqm, predominantly driven by a large negative net absorption in Q4, similarly reflecting the increase in vacancy rate outlined above.
- 5.2.33 Trends in net absorption observed in both areas are indicative of fluctuating demand for floorspace over the period, with a marginally stronger and more volatile pattern across East Herts than within Hertford and Ware. Changes in work models and increased economic uncertainty are likely key contributing factors in falling demand, or fluctuating demand in the

case of East Herts. Sectors and occupiers in Hertford and Ware can potentially be considered as being more influenced by these changes than across the wider area, but other indicators such as type and quality of space and fit with current market requirements will also play a part such that it is not possible to be definitive in assigning reasons behind the trends.

Figure 5-12 Historic net absorption of office floorspace in Hertford and Ware and East Herts (2014-2025, sqm)



Source: CoStar (2026).

Summary

5.2.34 In summary, a number of trends and characteristics are apparent with respect to the office market in Hertford and Ware:

- Hertford and Ware represents a significant share of the East Herts office market, accounting for 48.1% of office properties and 54.5% of the floorspace.
- Vacancy levels have displayed a relatively steady trend from 2014 Q1 to 2025 Q2, rising briefly in 2020 Q2 in line with the Covid-19 pandemic. However, from 2025 Q3, vacancy rates in Hertford and Ware and East Herts rose drastically, attributable to approximately 19,000 sqm of office space being vacated at County Hall. Prior to 2025 Q3, vacancy rates in Hertford and Ware and East Herts remained below the East of England and England.
- Feedback from agents suggests that there is very limited activity in the office market in the towns of Hertford and Ware. Office space is predominantly focused on local professional companies, such as accountants and small legal firms, with limited churn in the market. While the long term vacancy rate preceding the space at County Hall coming to market was relatively low, feedback has indicated that office space has been converted to other uses such as residential and may not have been actively marketed which may have contributed to keeping rates low following the impact of the Covid-19 pandemic.
- Hertford and Ware’s office market is dominated by smaller units, with the largest share of properties falling between 100–250 sqm (32.8%), consistent with East Herts (32.9%) but higher than regional and national averages. Larger offices (1,000–2,000 sqm and

2,000+ sqm) represent only 11.3% of properties, higher than the district average, but lower than regional and national averages.

- The office stock in Hertford and Ware is relatively old, with 29.3%³⁶ of offices being built before 1960, lower than East Herts and England, but greater than the East of England. Modern office development is limited, accounting for 5.8% of stock, below district, regional and national averages. Floorspace trends broadly reflect this, although Hertford and Ware has a higher proportion of pre-1960 floorspace than East Herts, which is likely heavily influenced by the floorspace at County Hall.
- While in line with East Herts, building condition is relatively worse in Hertford and Ware compared with the East of England and England. However, as noted in paragraph 5.2.24, the lower prevalence of higher-quality office buildings in Hertford and Ware is expected to an extent due to the concentration of existing stock in and adjacent to historic town centres where there are tight spatial constraints, reducing opportunities to modernise stock.
- Hertford and Ware attracts higher market rental values for office use classes than East Herts, but lower market rental values than the regional and national averages. This is reflective of the small size of the market and the age, size and quality profile of office stock in the town. As with other locations in East Herts, the low achievable rental values in Hertford and Ware present viability challenges for the delivery of new office floorspace.

5.3 Industrial and Warehousing and Storage Market

5.3.1 This section presents findings related to the industrial (E(g)(iii) and B2 uses) and warehousing and storage (B8 uses) property market in Hertford and Ware, benchmarked against East Herts, the East of England, and England. Within Hertford and Ware, industrial and warehousing and storage properties are primarily concentrated in key employment sites such as Hertford Logistics Hub, Crane Mead Business Park and Hertford Industrial Estate.

Buildings and Floorspace

5.3.2 According to CoStar and shown in Table 5-5, there are 43 industrial properties in Hertford and Ware, comprising 144,058 sqm of floorspace. There are 102 industrial properties in East Herts comprising around 197,327 sqm of floorspace. Therefore, industrial properties in Hertford and Ware comprise of 42.2% of the industrial properties in East Herts and 73.0% of the floorspace, suggesting that properties are, on average, larger in Hertford and Ware than found more generally across the local authority area.

5.3.3 Hertford and Ware is home to 52 warehousing and storage properties, providing 102,001 sqm of floorspace – approximately 35.3% of warehousing and storage floorspace across East Herts.

Table 5-5 Industrial and Warehousing and Storage properties – buildings and floorspace (2025 Q4)

	Hertford and Ware	East Herts	East of England	England
Industrial [E(g)(iii) / B2]				
Number of properties	43	102	6,464	61,477
Floorspace (sqm)	144,058	197,327	8,832,380	100,732,804
Warehousing and Storage [B8]				
Number of properties	52	121	6,224	57,595
Floorspace (sqm)	102,001	288,611	21,320,269	202,041,746

Source: CoStar (2026).

³⁶ Note that this is a likely underestimate given the high number of properties of Unknown age, as classified by CoStar, many of which would be anticipated to have been constructed pre-1960.

- 5.3.4 Since 2014, there has been a decrease in all industrial and warehousing and storage employment floorspace types in Hertford and Ware as shown in Table 5-6. Hertford and Ware saw a decrease in industrial (E(g)(iii) and B2) floorspace of 7.6% and a decrease in B8 floorspace of 8.1%. Stakeholder engagement with local agents highlighted the loss of employment floorspace to residential use at sites including Mead Lane, Hertford and Crane Mead in Ware.

Table 5-6 Industrial and warehousing floorspace in Hertford and Ware (2014-2025)

Floor Space Type	Q1 2014	Q4 2025	Change
Industrial [E(g)(iii) / B2]	157,550	144,058	-13,492
Warehousing and storage [B8]	110,712	102,001	-8,711
Total	268,262	246,059	-22,203

Source: CoStar (2026).

Vacancy

- 5.3.5 The vacancy rate of industrial and warehousing and storage floorspace as of 2025 Q4 is shown in Table 5-7.
- 5.3.6 For industrial floorspace, vacancy rates are consistently low across all areas. Hertford and Ware records a vacancy rate of 1.5%, in line with East Herts (1.4%) but lower than the East of England (3.5%) and England (2.8%).
- 5.3.7 Hertford and Ware shows a slightly higher vacancy rate (7.4%) for warehousing and storage compared to East Herts (6.5%) and the East of England (6.9%) but is broadly in line with the vacancy rate across England (7.3%).
- 5.3.8 As reflected in the previous section, a frictional vacancy rate of 5-8% is generally viewed to represent a property market in balance, and with sufficient capacity to support move-ins and move-outs. The vacancy rate for industrial space in Hertford and Ware falls below this level which could indicate a lack of spare capacity in the market, while the vacancy for warehousing and storage suggests a more balanced position. However, consultation with local agents reflected views that there was a lack of spare capacity for both industrial and warehousing and storage floorspace in Hertford and Ware to accommodate robust demand, in particular in locations with access to the A10. Agents highlighted the performance of Hertford Logistics Park, a 200,000 square foot (sqft) logistics development which is nearly fully let, as well as the strong performance of B2/B8 developments in neighbouring locations such as Hoddesdon in the Borough of Broxbourne.

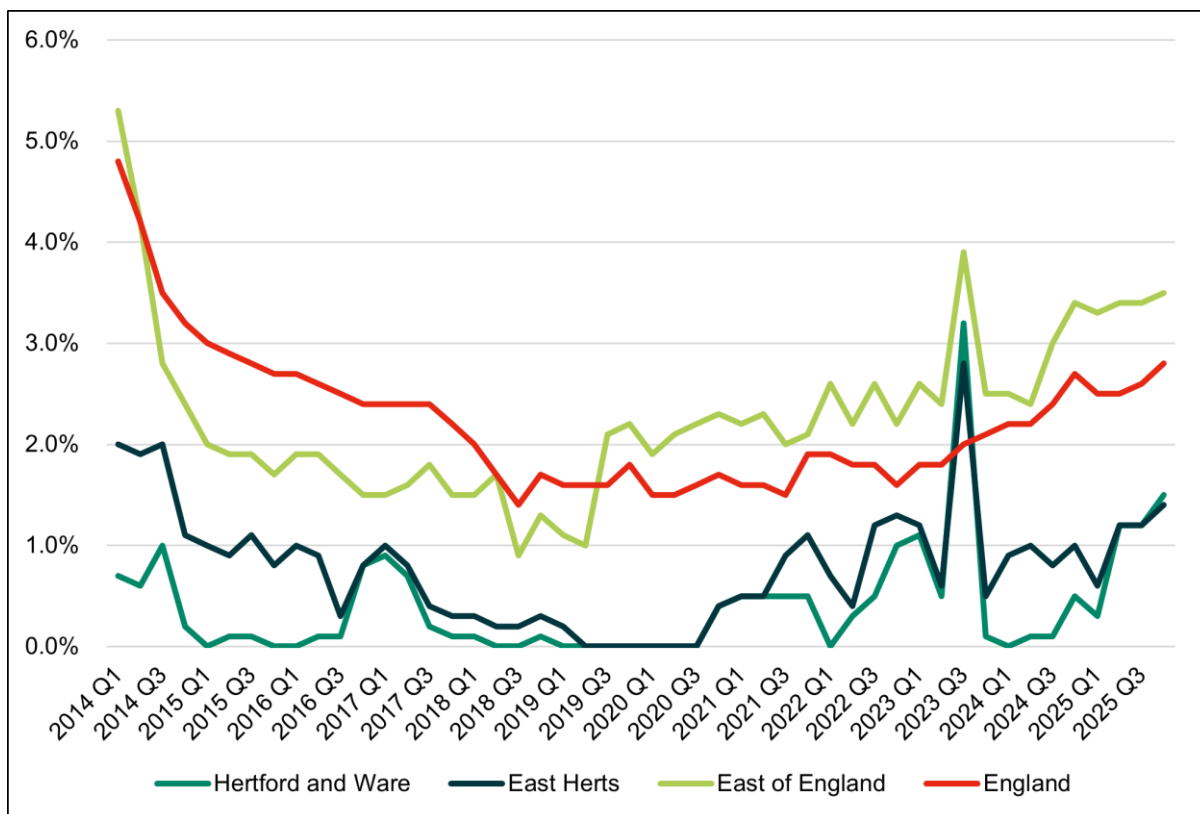
Table 5-7 Industrial and Warehousing and Storage properties – Vacancy Rate (2025 Q4)

Property Type	Hertford and Ware (%)	East Herts (%)	East of England (%)	England (%)
Industrial	1.5	1.4	3.5	2.8
Warehousing and storage	7.4	6.5	6.9	7.3

Source: CoStar (2026)

- 5.3.9 As shown in Figure 5-13, the trend in the industrial vacancy rate in Hertford and Ware has demonstrated consistently low rates under 1.5% with the exception of 2023 Q3 with a peak of 3.2%. However, this slight volatility could reflect the relatively small amount of industrial stock, with just 43 properties of this use class.
- 5.3.10 Vacancy rates in East Herts, the East of England and England as a whole have been slightly higher than vacancy rates across Hertford and Ware over the past decade, albeit still low comparatively. Generally, larger markets are less prone to significant fluctuations/volatility.

Figure 5-13 Industrial Vacancy Rate (2014 Q1 to 2025 Q4)



Source: CoStar (2026).

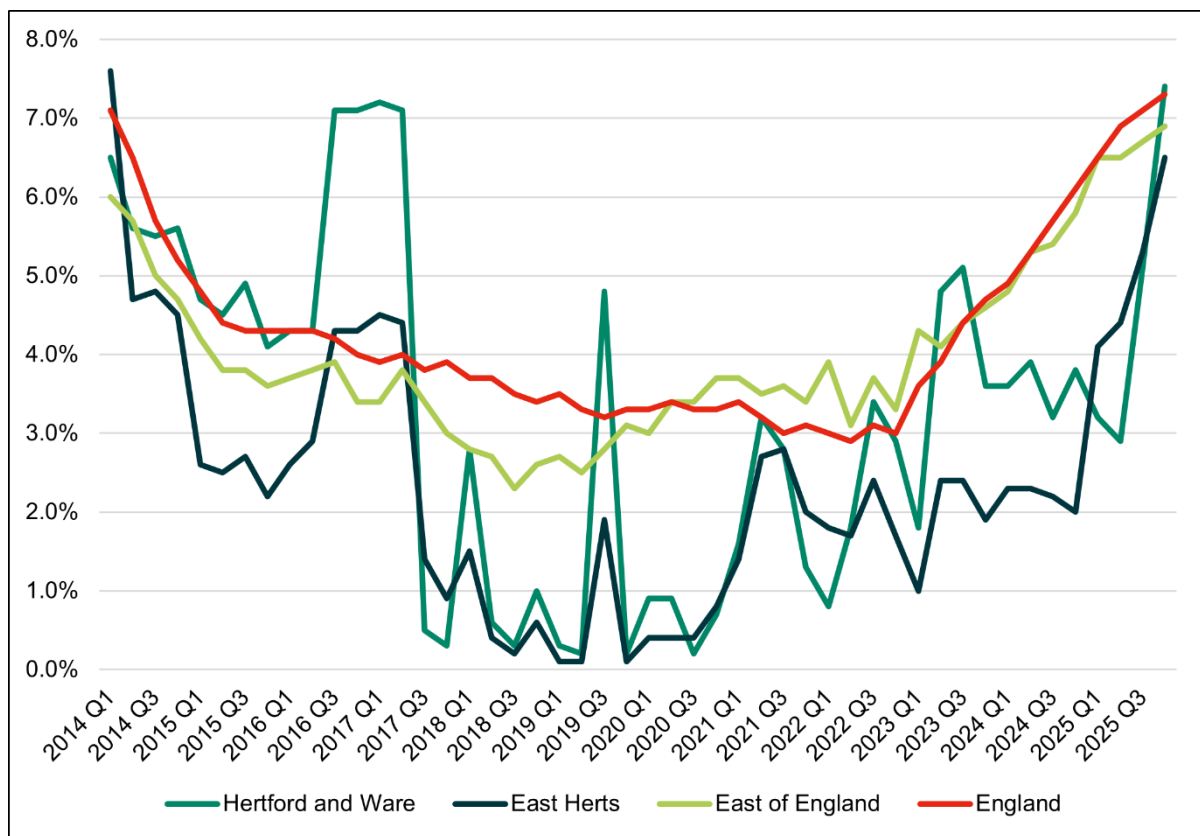
5.3.11 As shown in Figure 5-14, warehousing and storage vacancy rates have been more volatile than industrial vacancy rates over the past decade. In Hertford and Ware, vacancy rates for warehousing and storage floorspace peaked at 7.4% in 2025 Q4, having previously stood between 0.2% and 0.7% from 2019 Q4 to 2020 Q4. Up to 2025, overall warehousing and storage rates generally remained below 5% with the exception of 2016 Q3 to 2017 Q2.

5.3.12 A similar picture is evident across the other comparator areas, with all areas seeing an uptick in vacancy rates over the past 2-3 years. This is consistent with the wider market, whereby the high level of logistics demand during the pandemic prompted a strong development response, with new floorspace completed subsequently as demand conditions normalised³⁷. Wider economic uncertainty, including inflation and rising geopolitical tensions, have also been viewed as contributing factors to the increase in vacancy observed over recent years³⁸. However, as noted above, agents reflected that there was robust demand and a lack of sufficient capacity for both industrial and warehousing and storage floorspace in Hertford and Ware.

³⁷ Lambert Smith Hampton (2022) Research: Industrial & Logistics Surpasses all Records in 2021. Available at: <https://www.lsh.co.uk/explore/research-and-views/research/2022/3/industrial-and-logistics-market-report-2022> [Accessed: 16/02/26].

³⁸ Savills (2024) Industrial & logistics take-up returns to normality but remains 12% above pre-Covid average. Available at: <https://www.savills.co.uk/insight-and-opinion/savills-news/355936-0/industrial-and-logistics-take-up-returns-to-normality--but-remains-12--above-pre-covid-average> [Accessed: 16/02/26].

Figure 5-14 Warehousing and Storage Vacancy Rate (2014 Q1 to 2025 Q4)



Source: CoStar (2026).

Rental Values

- 5.3.13 The market rental values per square metre for industrial and warehousing and storage floorspace are set out in Table 5-8.
- 5.3.14 Industrial properties in Hertford and Ware (£148.97/sqm) had a higher market rental value than the East Herts (£145.54/sqm), East of England (£116.85/sqm) and England (£99.02/sqm) averages.
- 5.3.15 In terms of warehousing and storage, the Hertford and Ware (£171.06/sqm) rental value is also higher than the East Herts (£146.88/sqm), East of England (£115.68/sqm) and England (£100.94/sqm) averages.
- 5.3.16 Feedback from the market noted that the development of industrial space faces fewer viability constraints in comparison to the development of office space, owing to more robust demand profile, rental levels and the lower cost of development for industrial and warehousing and storage space. Agents highlighted the ability for industrial development to compete with residential development in Hertford and Ware on a commercial basis.

Table 5-8 Market rental values – Industrial and Warehousing and Storage (£/sqm) (2025 Q4)

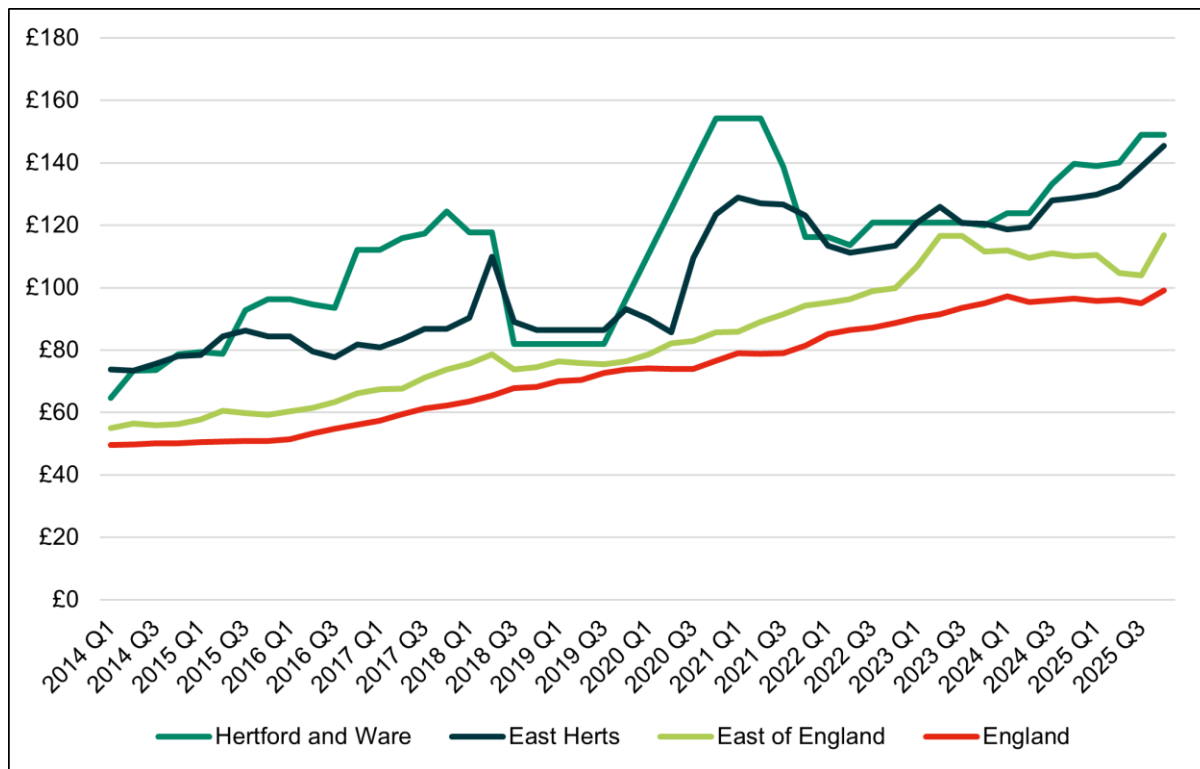
Property Type	Hertford and Ware	East Herts	East of England	England
Industrial	148.97	145.54	116.85	99.02
Warehousing and storage	171.06	146.88	115.68	100.94

Source: CoStar (2026).

- 5.3.17 As set out in Figure 5-15, industrial market rents in Hertford and Ware fluctuated from 2015 to 2018, and again from 2021 to 2022. However, despite the fluctuations, an upwards trend was exhibited as market rental value increased from £64.63/sqm in 2014 Q1 to £148.97/sqm in 2025 Q4, an increase of 130.5%. The percentage increase in market rental

value of industrial floorspace across the same time period in Hertford and Ware was higher than across East Herts (97.3%), the East of England (112.4%), and England as a whole (99.6%). That rental values have remained a fairly consistent degree higher than in these wider geographies even when they have increased across the board is indicative of the underlying factors underpinning demand for space locally enduring over time and remaining strong.

Figure 5-15 Industrial market rent Q1 2014 to Q4 2025 (£/sqm)³⁹



Source: CoStar (2026).

- 5.3.18 Between 2014 Q1 and 2025 Q4, warehousing and storage market rents in Hertford and Ware registered growth, rising by 156.1% (from £66.79/sqm in 2014 Q1 to £171.06/sqm in 2025 Q4), as shown in Figure 5-16. Similarly, the percentage increase in market rental value of B8 floorspace across the same time period was higher in Hertford and Ware compared to East Herts (115.3%), the East of England (109.0%) and England as a whole (112.6%).
- 5.3.19 A similar trend has been observed in East Herts, which has sustained large growth in rental values following the Covid-19 pandemic. Conversely, East of England and England have seen a more gradual trend over the past decade, with sustained growth and more limited volatility, albeit rental growth has levelled off from 2024 onwards.

³⁹ Where rental data was unavailable between 2019 Q4 and 2020 Q3 (inclusive), values have been interpolated based on adjacent data points to provide a consistent time series. These interpolated figures should be interpreted with caution, as they may not fully reflect market conditions at the time.

Figure 5-16 Warehousing and Storage market rent Q1 2014 to Q4 2025 (£/sqm)⁴⁰



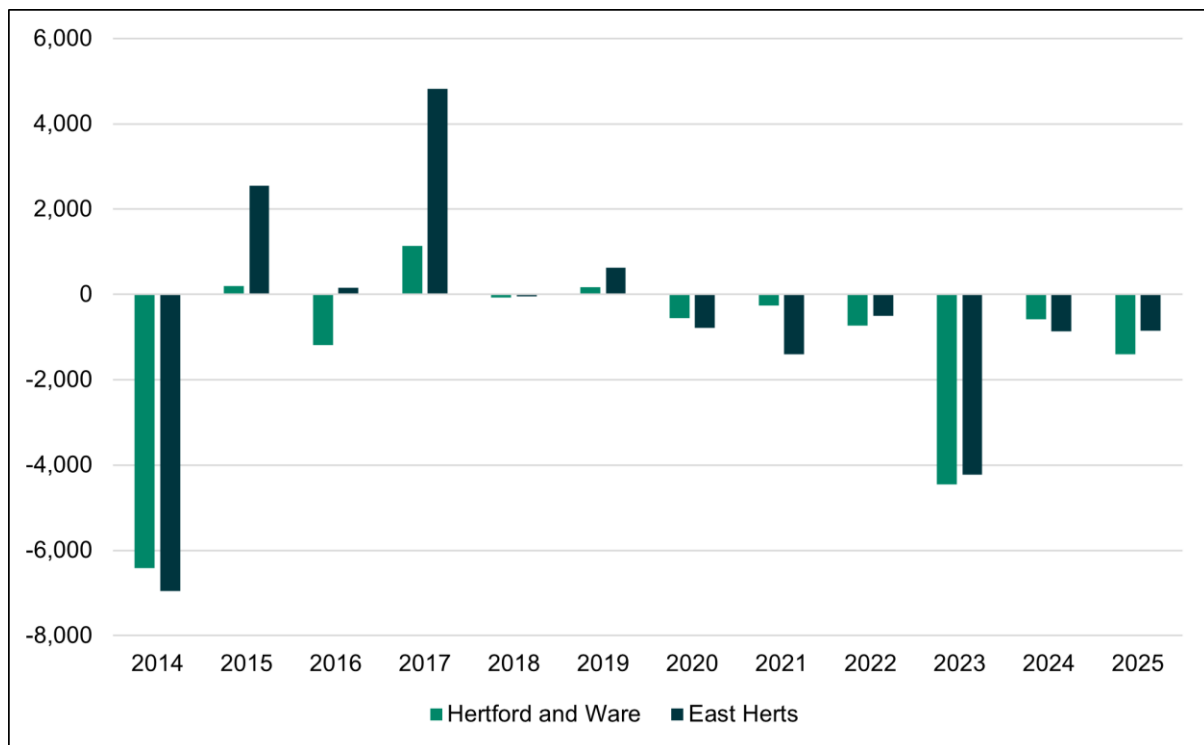
Source: CoStar (2026).

Net absorption

- 5.3.20 Figure 5-17 presents the net absorption for industrial floorspace in Hertford and Ware and East Herts.
- 5.3.21 With regard to industrial floorspace, net absorption in Hertford and Ware was generally negative, with a low of -6,419 sqm in 2014, and a peak of 1,142 sqm in 2017, with 2015 and 2019 the only other years with positive net absorption. From 2020 onwards, net absorption was consistently negative.
- 5.3.22 Net absorption in East Herts shows a broadly similar pattern between 2014 and 2025 with positive net absorption in 2015, 2016, 2017 and 2019, peaking in 2017 at 4,823 sqm. The lowest net absorption in this period was in 2014 at -6,957 sqm. Similar to Hertford and Ware, net absorption turned consistently negative in East Herts from 2020 onwards.
- 5.3.23 The general trend points to negative net absorption in Hertford and Ware and East Herts over the past decade, implying that more space was vacated than newly leased. However, given the limited spare capacity in the market and feedback from agents, this is unlikely to reflect a reduction in demand but the constrained market for space in Hertford and Ware.

⁴⁰ Where rental data was unavailable for 2020 Q1 and 2020 Q2, values have been interpolated based on adjacent data points to provide a consistent time series. These interpolated figures should be interpreted with caution, as they may not fully reflect market conditions at the time.

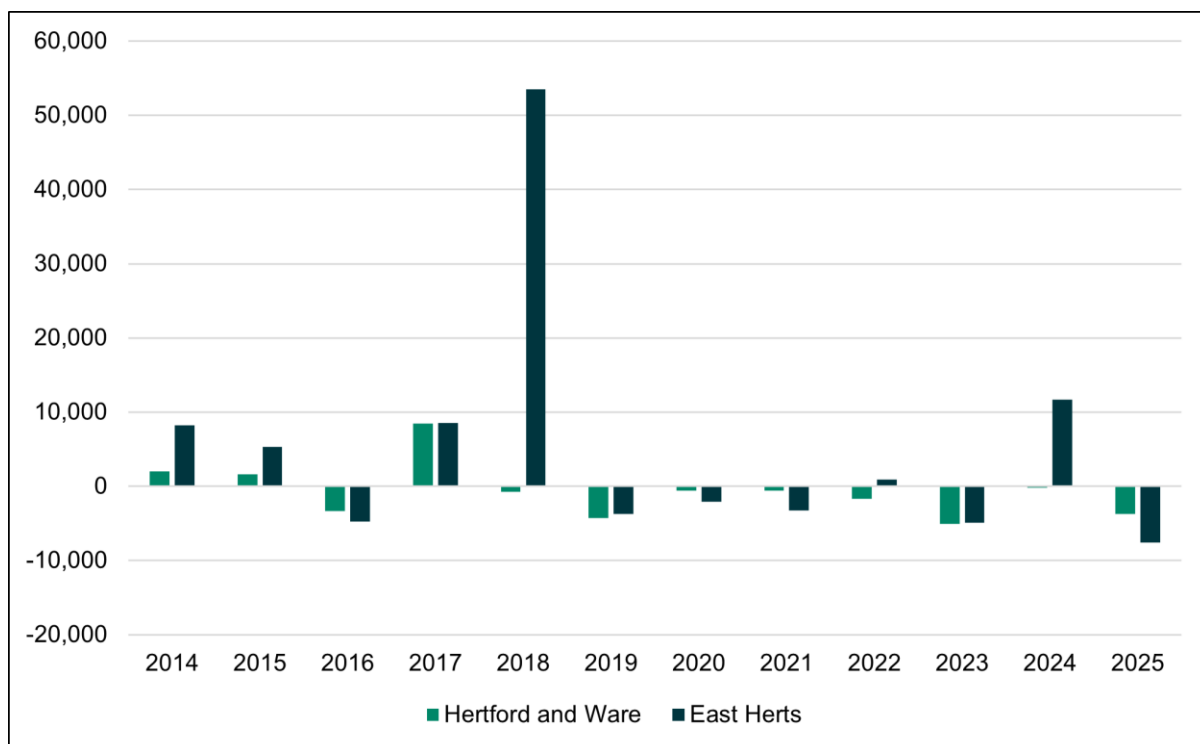
Figure 5-17 Historic net absorption of industrial floorspace in Hertford and Ware and East Herts (2014-2025, sqm)



Source: CoStar (2026)

- 5.3.24 Net absorption for warehousing and storage uses in Hertford and Ware between 2014 and 2018 was generally positive as shown in Figure 5-18, increasing from 2,046 sqm in 2014 to 8,451 sqm in 2017. However, from 2018 onwards, net absorption in Hertford and Ware consistently became negative with the lowest level in this period in 2023 at -5,071 sqm.
- 5.3.25 In East Herts there has been more volatility in the net absorption. From 2014 to 2018, net absorption was largely positive, with the exception of 2016, reaching a peak of 50,488 sqm in 2018. However, from 2019 to 2025, net absorption was more variable, with positive net absorption in 2022 and 2024 before reaching its lowest in 2025 at -7,577.
- 5.3.26 While there has been some volatility, as with the market for industrial space the general trend points to negative net absorption of warehousing and storage space in Hertford and Ware and East Herts over the past decade. This implies that more space was vacated than newly leased. However, given the limited spare capacity in the market and feedback from agents, this is unlikely to reflect a reduction in demand but the constrained market for space in Hertford and Ware.

Figure 5-18 Historic net absorption of warehousing and storage floorspace in Hertford and Ware and East Herts (2014-2025, sqm)



Source: CoStar (2026)

Summary

5.3.27 In summary, a number of trends and characteristics are apparent with respect to the industrial and warehousing and storage market in Hertford and Ware:

- The market comprises 246,059 sqm of floorspace in Hertford and Ware, ~41% of which is warehousing and storage and 59% is B2/ E(g)iii.
- The vacancy rate for industrial floorspace in Hertford and Ware is below the regional and national average, reflecting a lack of spare capacity. Warehousing and storage uses have the highest vacancy rate, across all comparator areas, albeit this is broadly in line with accepted frictional vacancy rates. However, consultation with local agents reflected views that there was a lack of spare capacity for both industrial and warehousing and storage floorspace in Hertford and Ware to accommodate robust demand, in particular in locations with access to the A10.
- Hertford and Ware attracts higher market rental values for industrial property types than East Herts, the East of England and England. For warehousing and storage, the market rental values in Hertford and Ware are also higher than observed in East Herts, East of England and England.
- Between 2014 and 2025, market rental values for all use classes exhibited an overall increase. The increase in market rental values is greater in Hertford and Ware than across East Herts as a whole. Feedback from the market noted that the development of industrial space faces fewer viability constraints in comparison to the development of office space, owing to more robust demand profile, rental levels and the lower cost of development for industrial and warehousing and storage space. Agents highlighted the ability for industrial development to compete with residential development in Hertford and Ware on a commercial basis.
- Across Hertford and Ware and East Herts, net absorption across use classes fluctuated between 2014 and 2025, with noticeable declines recorded around and after the Covid-19 pandemic period.

5.4 Influences on Demand

- 5.4.1 There are a number of external factors which could influence the demand for employment floorspace in Hertford and Ware. Some key considerations are set out below.

Strategic Opportunities and Anchor Employers

- 5.4.2 The role of larger occupiers in Hertford and Ware is relatively limited but remains an important influence on local demand dynamics and the sectoral profile of employment.
- 5.4.3 In this context, GlaxoSmithKline (GSK) in Ware represents a key anchor employer, supporting the area's existing strengths in life sciences and manufacturing. The GSK Ware campus is home to one of the company's six UK pharmaceutical manufacturing sites and a significant R&D facility, with around 1,350 employees in total. Its presence – with the company having been active in Ware since 1969 – aligns with identified growth potential in these sectors and contributes to a degree of stability in higher-value employment uses.
- 5.4.4 A more immediate influence on the employment land position is Hertfordshire County Council's decision to vacate County Hall in Hertford and consolidate the majority of services and staff at its Stevenage office campus. This has contributed to a marked reduction in public administration employment locally and is reflected in a significant decline in the sector's share of total employment.
- 5.4.5 The County Hall site is currently being marketed. Particulars note that over 12 months of marketing for continued employment use has been undertaken and has proved unsuccessful, with the property having been submitted in the recent East Herts call for sites and promoted for a development of mixed uses to include residential development, commercial or community uses.
- 5.4.6 No decisions have yet been made, but given this context, it is unlikely that the site would be fully reoccupied for office use. As such, its redevelopment would reduce the overall supply of vacant offices and further reinforce the shift away from large-scale public sector occupation.

Minimum Energy Efficiency Standards

- 5.4.7 The contribution of buildings to greenhouse gas emissions is increasingly recognised. This understanding presents both challenges and opportunities, given the potential for emissions savings to be made. It is estimated that buildings are responsible for between 17% and 31%^{41,42} of national emissions.
- 5.4.8 The energy performance of buildings in the UK is monitored through the Energy Performance Certificate (EPC) system. Non-domestic private rented properties are awarded a certificate rating between A+ (most efficient) and G (least efficient). Properties awarded an A+ rating are considered to achieve Net Zero carbon emissions.
- 5.4.9 In order to drive the decarbonisation of the UK's non-domestic building stock, commitments have been made to encourage the construction of more energy efficient buildings and upgrading/retrofitting existing buildings through the implementation of restrictions on private lettings based on energy performance. Non-domestic buildings must comply with Minimum Energy Efficiency Standards (MEES) in order to lawfully be leased. At the time of writing (June 2026), MEES regulations apply to those non-domestic buildings which have been awarded an EPC rating of F or G, whereby these properties cannot enter into new leases until improvements have been made. A number of exemptions apply^{43,44}, including that

⁴¹ This figure includes only emissions from direct energy use in buildings.

<https://www.gov.uk/energy-performance-certificate-commercial-property/exemptions>

⁴² Additional exemptions to the new regulations are set out by RICS at <https://ww3.rics.org/uk/en/journals/property-journal/epc-requirements-commercial-property.html>. Exemptions apply to leases less than 6 months or greater than 99 years; to the need to perform upgrading works until a new EPC is triggered; where the costs of works would be greater than the energy saving over seven years; where third-party consent precludes works e.g. planning permission refusal where reasonably sought; where works would devalue property by over 5%; where the landlord has recently become one.

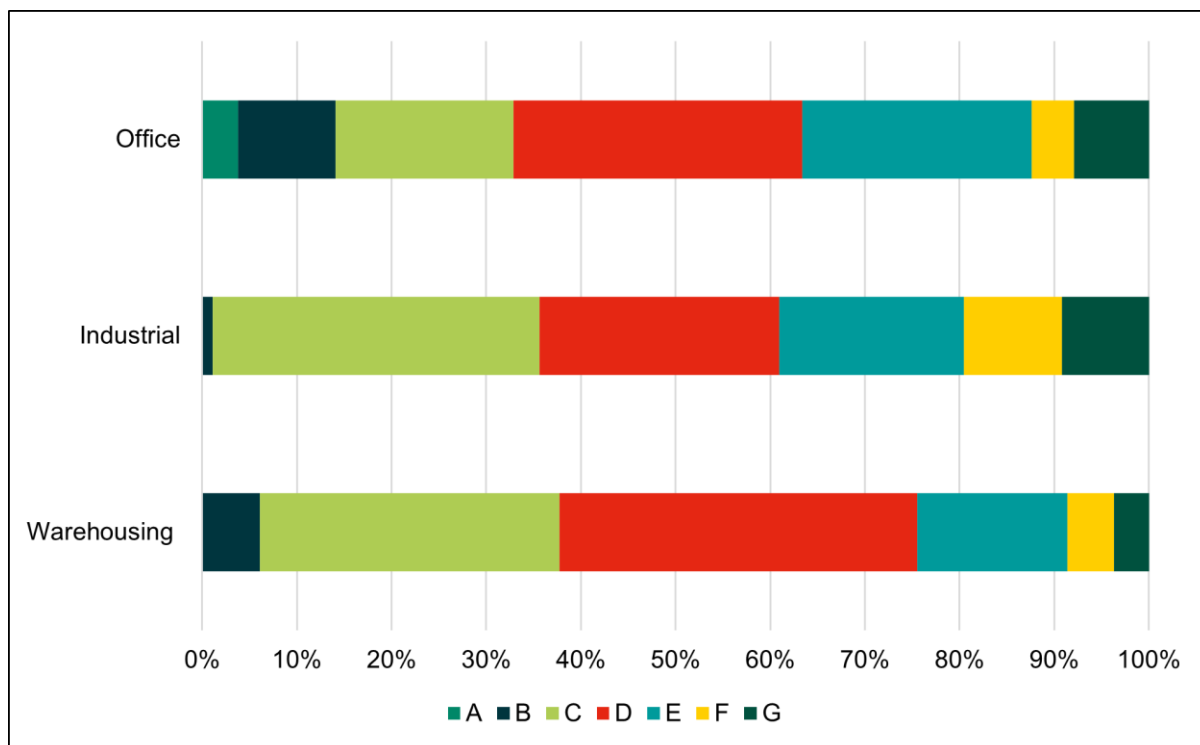
⁴³ <https://www.gov.uk/energy-performance-certificate-commercial-property/exemptions>

⁴⁴ Additional exemptions to the new regulations are set out by RICS at <https://ww3.rics.org/uk/en/journals/property-journal/epc-requirements-commercial-property.html>. Exemptions apply to leases less than 6 months or greater than 99 years; to the need

improvements must be ‘permissible’, ‘appropriate’ and ‘cost effective’⁴⁵. As of 1st April 2023, MEES apply to existing leases, not solely new leases as had been the case previously⁴⁶.

5.4.10 A breakdown of the EPC certificates awarded by use type⁴⁷ in Hertford and Ware is shown in Figure 5-19. Only 14% of office certificates in Hertford and Ware have an EPC rating of A+ to B, higher than the stock of industrial (1%) and warehousing and storage certificates (6%). None in Hertford and Ware are considered to achieve Net Zero carbon emissions (A+ rating).

Figure 5-19 EPC Certificates in Hertford and Ware by use type



Source: Department for Levelling Up, Housing & Communities (2026) Energy Performance of Buildings Data England and Wales: Non-domestic EPC.

5.4.11 It is anticipated that the minimum standard will be sequentially increased such that building efficiency expectations are raised in line with Government ambitions to deliver against net zero commitments⁴⁸, as the minimum EPC rating for non-domestic properties to be leased will be raised to C by 1st April 2027 and to B by April 2030. Figure 5-20 shows the current dates for the raising of the minimum EPC rating. The proportion has been applied to property market floorspace information to indicate the proportion of applicable floorspace in these scenarios. It is clearly evident that the scale of upgrading, retrofitting, and replacing building stock such that it will comply with anticipated MEES is considerable, particularly for office properties. As set out, current and potential future exemptions may apply, nonetheless the significant proportion of buildings which are likely to not meet the correct standard presents challenges, in terms of implementation, enforcement and compliance.

5.4.12 In 2021, the Department for Business, Energy and Industrial Strategy engaged in consultation on implementation of the EPC B target by 2030 which highlighted the significant implementation issues that would need to be addressed. The number of EPC certificates in

⁴⁵ RICS, (2018); Minimum Energy Efficiency Standards (MEES): Impact on UK property management and valuation.

⁴⁶ <https://www3.rics.org/uk/en/journals/property-journal/epc-requirements-commercial-property.html>

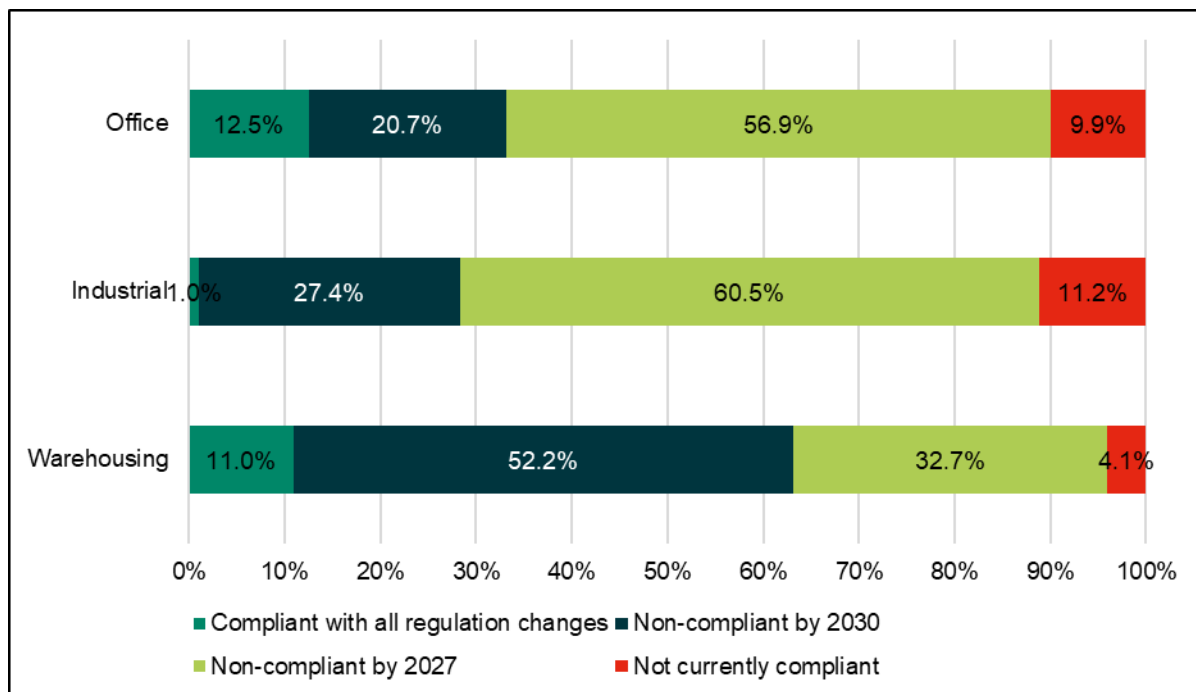
⁴⁷ It should be noted that the use types employed by MHCLG to categorise buildings do not directly align with those categories applicable to CoStar data presented in the property market analysis section of the report. Data is therefore presented by considering the broad use types shown to comprise buildings categorised by MHCLG as follows:

- Office: ‘B1 Office and Workshop Businesses’ and ‘Office’;
- General industrial: ‘B2 to B7 General Industrial and Special Industrial Groups’; and
- Storage and distribution: ‘B8 Storage or distribution’ and ‘Warehouse and storage’.

⁴⁸ HM Government, (2020); Energy White Paper: Powering our Net Zero Future.

Hertford and Ware which falls within the scope of tightening regulations to 2030 is 639, reflecting 90% of floorspace⁴⁹.

Figure 5-20 MEES compliance of present EPC certificates with anticipated regulation changes (%)



Source: Department for Levelling Up, Housing & Communities (2026) Energy Performance of Buildings Data England and Wales: Non-domestic EPC.

5.4.13 This potential regulatory shift presents both challenges and opportunities for the local property market in Hertford and Ware, common across historic town centres in England and Wales. Retrofit costs may be significant, particularly for older office buildings which are typically more complex and costly to retrofit than industrial buildings, creating the potential for stranded assets. In this regard, compliance may present particular challenges for office stock in Hertford and Ware which includes a relatively high proportion of older buildings and conversions rather than purpose-built office space.

5.4.14 However, the regulatory changes provide a strong incentive for the modernisation and upgrading of business floorspace. Improvements in energy performance may also enhance the quality of the local building stock, while supporting lower operating costs and improved environmental performance. Over time, this may contribute to the renewal and upgrading of the town’s employment floorspace.

5.4.15 It should be noted that the Government’s work on related data reforms and responses to earlier MEES consultation has been ongoing for several years, and formal proposals remain under review. Consequently, the scale of current and future exemptions across the non-domestic sector is not currently understood^{50,51}.

Changing Office Workspace Requirements

5.4.16 This sub-section delves into the recent evolution of changing space requirements for office and knowledge work.

⁴⁹ It should be noted that the EPC dataset captures data on an intra-building level where applicable i.e. different floors will have their own ratings and entries in the database, whereas in CoStar typically a building is a singular entry in its database. The number of EPC certificate records, 639, is therefore greatly higher than the number of building records in CoStar i.e. 286 office and industrial premises.

⁵⁰ Department for Business, Energy and Industrial Strategy (2021). The Non-Domestic Private Rented Sector Minimum Energy Efficiency Standards: Implementation of the EPC B Future Target.

⁵¹ Department for Energy Security and Net Zero (2024). Improving the Energy Performance of Privately Rented Homes: Consultation.

- 5.4.17 The work-from-home shift is a key driver of the evolving landscape in the UK. The most recent data from the Office for National Statistics⁵² highlighted that 44% of workers in the East of England embrace home (14%) or hybrid (30%) work, reshaping models, and foretelling a lasting change, with 75% of those working from home or hybrid anticipating a lasting change to in-person work patterns. By way of comparison, Annual Population Survey data from before the Covid-19 pandemic shows that around 17.6% of working adults reported working from home at some point in the week before the interview.
- 5.4.18 The future of office spaces is set to be shaped by intricate dynamics involving employee attendance rates and the broader economic landscape. Survey data from February 2026⁵³ indicated that office occupancy rates across the UK have stabilised above the 40% mark, with a weekly peak of 44.1% in late January 2026. This compares with pre-pandemic occupancy rates estimated between 60% and 80%. Tuesdays, Wednesdays, and Thursdays are the busiest days of the week for staff to be at their desks, with Friday remaining the quietest day. Faced with this new reality, employers are confronted with challenges to entice employees back to the office environment, thus influencing decisions related to office expansion, right-sizing office spaces, and delaying real estate investments.
- 5.4.19 The changing dynamics in the office market have been reflected in East Herts, with emergence of office hubs such as Launchpad⁵⁴ to reflect flexible working arrangements where companies and individuals may not require a specific premises of their own on a permanent basis but can utilise co-working office accommodation and meeting spaces to align with their needs.
- 5.4.20 The context within the office market, characterised by extended leases held, suggests that a time lag will occur before a decrease in demand for office space is fully evident. This delay provides a window during which office job numbers might increase, employee attendance rates could experience a partial recovery, and a pursuit of high-quality office environments may persist, collectively contributing to a relatively gradual and controlled transition for office providers. This temporal overlap also affords occupiers, developers, landlords, and policymakers the opportunity to proactively adapt to these evolving trends. However, it is noteworthy that peripheral locations and areas with limited premium office offerings might experience a more pronounced impact due to the variable nature of the “flight to quality⁵⁵”.
- 5.4.21 This trend of downsizing of requirements by office occupiers is already driving decisions by businesses to reduce their premises size with impacts on vacancy rates. In turn this may potentially result in new office floorspace being of lower average density than has been typical. The growth of use of artificial intelligence (AI) within sectors and occupations in offices could, on face-value, lead to further downsizing due to reductions in headcount at premises. However, there is considerable uncertainty as to the extent and at what pace such change would occur with limited evidence at present of firms seeking to do this for this reason on a noticeable level.

⁵² ONS (2023) Characteristics of homeworkers, Great Britain: September 2022 to January 2023.

⁵³ Remit Consulting (2026) News Release: UK office occupancy stabilises above 40% as sector divide widens. Available at: <https://return.remitconsulting.com/resource-centre/57-uk-office-occupancy-stabilises-above-40-as-sector-divide-widens> [Accessed: 10/03/26].

⁵⁴ [Launchpad Business Centres | East Herts District Council](#)

⁵⁵ CBRE (2022) The Flight to Quality Quantified. Available at: <https://www.cbre.co.uk/insights/viewpoints/the-flight-to-quality-quantified> [Accessed: 06/03/26].

6. Existing Employment Sites

6.1 Introduction

6.1.1 There are 16 Employment Area allocations in Hertford and Ware which represent the majority of the existing supply of employment floorspace. Most of these sites are in or adjacent to the towns, with two sites being situated in the villages to the north of Ware:

- Caxton Hill;
- Foxholes Business Park;
- Hartham Lane;
- Mead Lane;
- Mimram Road;
- Warehams Lane;
- Windsor Industrial Estate;
- Pegs Lane;
- Broadmeads;
- Crane Mead;
- Ermine Point / Gentlemen's Field;
- Marsh Lane;
- Park Road / Harris's Lane (GSK Ware);
- Star Street;
- Oakley Horseboxes (High Cross); and
- Thundridge Business Park.

6.1.2 In addition to these Employment Areas, a short profile on Hertford and Ware town centres is also included, due to their role in accommodating office uses.

6.1.3 This section of the report provides an assessment of the relative characteristics of these sites.

6.2 Employment Areas

Caxton Hill

6.2.1 Caxton Hill is an important, 6.25ha employment site located within a residential area in the east of Hertford. The site has improved access to the A414 through Foxholes Business Park, making the two employment areas interconnected. Since planning permission was granted in 2023 for redevelopment, 16 high-quality units (4ha of land) now form the new 'Hertford Logistics Hub' totalling 23,225 sqm of floorspace. The remaining 2.25ha comprises predominantly older units, with no evidence of recent redevelopment and this older section of the Employment Area is accessed solely from Ware Road/Caxton Hill, except for active travel which is available between the two sections of the overall site.

6.2.2 The site is surrounded by residential housing, with the exception of the Foxholes Business Park (a separately designated Employment Area- see below), which is adjacent to the south-east, and is now itself linked to the Hertford Logistics Hub via John Tate Road.

6.2.3 Units are flexible, accommodating a range of potential businesses across Class E(g)(i), (ii), (iii), Class B2 and Class B8. There are numerous vacant units within the new Hertford

Logistics Hub, which are currently being marketed as the site redevelopment continues towards completion. Five of 16 units are occupied, with an additional four under offer.

6.2.4 Table 6-1 provides an overview of Caxton Hill.

Table 6-1 Overview of Caxton Hill (2025 Q4)

Number of units	Property types	CoStar Quality Rating	Office rent (£/sqm)	Industrial rent (£/sqm)	Uses
16	Industrial	2-4	n/a	£180.30	Commercial printer, logistics services, steel fabricator, powder coating service.

Source: CoStar (2026); East Herts District Council (2026) East Herts District Wide Employment Land Review.

6.2.5 Buildings in Caxton Hill date from 1957 to 2026, with properties built in the 1950s and 1960s refurbished in 2023 and 2024.

6.2.6 The estate is of good quality overall, as reflected by its CoStar rating, with 27.8% of properties rated 2, 61.1% rated 3, and 11.1% rated 4. The site is well maintained, with excellent parking availability, signage and road markings, and shrubbery, vegetation and a communal area with benches, improving environmental amenity. New units have a high standard of design and all incorporate roof-mounted solar PV panels. Generally, the older units which have not been redeveloped have a poorer quality of environment.

6.2.7 Connectivity and links with the wider strategic road network have been improved by the new access route through Foxholes Business Park, directly onto the A414 for the newly developed part of the Employment Area. Pedestrians and cyclists can both access the site via Caxton Hill and John Tate Road, which both have pavement along the side of the road. The site is well-served by public transport, with a bus stop approximately 300m from the entrance, with connections to numerous surrounding villages. It is an 11-minute walk from Hertford East Railway Station, offering good connectivity with London.

6.2.8 As shown in Table 6-1, industrial rents in 2025 Q4 were £180.30, remaining relatively stable from the end of 2024, prior to which, data was not available. Opportunities for further development are limited given topography and the surrounding residential and industrial area to the south-east.

Foxholes Business Park

6.2.9 Foxholes Business Park is a mixed-use estate (9.82ha), comprising of approximately 50 employment units, ranging in size and design.

6.2.10 The Business Park is bordered by the A414 on the southern edge of the site, with greenfield land beyond. The new Hertford Logistics Hub is adjacent to the north-west, with a new internal road making the two sites interconnected via John Tate Road. To the north and north-east, there is some green space and residential housing.

6.2.11 Use Classes include E(g)(i), (ii), (iii) and Class B2. Other uses include healthcare services, contracting companies, a day nursery, and a pilates studio.

6.2.12 Table 6-2 provides an overview of the Foxholes Business Park.

Table 6-2 Overview of Foxholes Business Park (2025 Q4)

Number of units	Property types	CoStar Quality Rating	Office rent (£/sqm)	Industrial rent (£/sqm)	Uses
50	Office and Industrial	2-3	221.52	130.78	Health services, contractors, nursery, pilates studio, manufacturer, internet marketing service, central heating service, digital printers.

Source: CoStar (2026); East Herts District Council (2026) Employment Land Review.

- 6.2.13 Buildings at Foxholes Business Park date from 1971 to 2000. Overall, Foxholes Business Park is of average quality, reflected in its CoStar ratings, with 18.2% of properties rated 2 and 81.8% rated 3. Units are generally arranged in smaller courtyards, with sufficient provision of parking across the business park, excellent signage, and an abundance of trees and vegetation which enhances the amenity of the general environment.
- 6.2.14 The main entrance of the site is directly from John Tate Road onto the A414, which then links with the A10, approximately 1 mile east. The A414 also facilitates connection west toward the A1(M). Despite being located and primarily accessed via the A414 dual carriageway, the site has good accessibility for pedestrians and cyclists. There is a pavement along the A414 London Road into Hertford, and multiple public footpaths running directly into and out of the business park on its east side. In terms of public transport, a bus stop is located less than 100m from the site, but there are limited buses running from it. The Caxton Hill bus stop on Ware Road is a better option, located 700m away, accessible through Hertford Logistics Hub.
- 6.2.15 In 2025 Q4, the vacancy rate at Foxholes Business Park stood at 3.0%, increasing from 1.4% in 2024 Q4. There are currently three offices spaces vacant along The Chase and Watermark Way, ranging from 65 sqm to 381 sqm.
- 6.2.16 As shown in Table 6-2, office and industrial rents in 2025 Q4 were £221.52/sqm and £130.78/sqm respectively. Over the past decade, rents have broadly increased since 2016 Q1 in line with inflationary and market pressures, from £161.35/sqm and £72.44/sqm for office and industrial rents respectively. Opportunities for further development are limited given the surrounding industrial and residential uses to the north-west, and north and north-east respectively.

Hartham Lane

- 6.2.17 Hartham Lane is a 1.85ha site split across two sites, each on either side of Hartham Lane. As Hertford's most central employment area, the site is very well connected to the town centre and surrounding areas.
- 6.2.18 To the east of the site is the historic McMullen's Brewery, and to the west is a cluster of approximately 20 small business units known as Great Northern Works. The site is divided in the centre by non-employment land, other historic brewing buildings and a large Sainsbury's supermarket.
- 6.2.19 Use Classes include Class E(g)(i), (ii), (iii), Class B2 and Class B8. The Great Northern Works area, though small, has benefited from some recent redevelopment, including good signage and an outdoor seating area, offering amenity to the area. Parking is sufficient, and the brewery site has a fenced private parking / delivery yard adjacent but separated from the Sainsbury's car park.
- 6.2.20 Table 6-3 provides an overview of Hartham Lane.

Table 6-3 Overview of Hartham Lane (2025 Q4)

Number of units	Property types	CoStar Quality Rating	Office rent (£/sqm)	Industrial rent (£/sqm)	Uses
20	Industrial, Office, Retail	1-3	230.89	140.79	IT services, R&D services, pilates studio, embroidery service, shipping company, brewery.

Source: CoStar (2026); East Herts District Council (2026) Wide Employment Land Review.

- 6.2.21 Buildings at Hartham Lane date from 1950 to 2020, reflecting the diverse mix of buildings, layout and architecture at this employment area.
- 6.2.22 The site is of below average quality overall, as reflected in its CoStar ratings, with 16.7% of buildings rated 1, 33.3% rated 2, and 50.0% rated 3.

- 6.2.23 As Hertford's most central employment area, Hartham Lane is very well connected to the town centre and surrounding areas. The site is less than 800 m away from the A414 which offers a link east towards the A10, and west towards the A1(M). However, during peak times there is significant congestion along the A414 through Hertford. There is good accessibility for pedestrians and cyclists, with numerous roads and pathways facilitating access from all directions. In terms of public transport, there are numerous bus stops less than 100 m south from Hartham Lane, creating links to surrounding settlements and circular routes around Hertford. Both Hertford North and Hertford East Railway Stations are approximately 800 m or a 10-minute walk from the site.
- 6.2.24 Since 2012 Q2, all units on site have been occupied and in use.
- 6.2.25 As shown in Table 6-3, office and industrial rents in 2025 Q4 were £230.89/sqm and £140.79/sqm respectively. Rents have shown a general upward trend since 2016 Q1, from £157.48/sqm and £80.51/sqm for office and industrial rents respectively, consistent with wider market conditions. Opportunities for development are limited, with expansion constrained by the central location of the site and surrounding development.

Mead Lane

- 6.2.26 Mead Lane is the largest employment site across the district (20.8ha), incorporating multiple difference industrial estates within it. The site allocation is bisected by the River Lea Navigation, with 2.7ha of developed, occupied employment land to the north-west and the larger 13.2ha site to the south-east. The remaining area of the site is allocated for mixed-use development under Policy HERT2 of the District Plan 2018. The site encompasses Mead Lane Industrial Estate, Lock House Industrial Estate, Centrus, Mead Lane Business Centre, Dicker Mill, and Marshgate Drive.
- 6.2.27 The industrial area comprising Dicker Mill and Marshgate Drive lies on the opposite side of the river and is constrained by surrounding green space, including Hartham Common. The larger employment area along Mead Lane is contained between the railway line serving Hertford East station and areas of public open space.
- 6.2.28 Use Classes include Class E(g)(i), (ii), (iii), Class B2 and Class B8, although the site is predominantly industrial, but with a range of independent businesses concentrated around the Dicker Mill and Marshgate Drive area to the north-west which include fitness and community halls.
- 6.2.29 Table 6-4 provides an overview of Mead Lane.

Table 6-4 Overview of Mead Lane (2025 Q4)

Number of units	Property types	CoStar Quality Rating	Office rent (£/sqm)	Industrial rent (£/sqm)	Uses
30+	Industrial, Office, Retail	1-3	230.56	143.81	Sofa store, vehicle dealer, gym, electrician, car body shop, commercial printer, dance school, pilates studio, central heating service, vehicle repair, travel agent, events management.

Source: CoStar (2026); East Herts District Council (2026) Employment Land Review.

- 6.2.30 Buildings at Mead Lane date from 1937 to 2025, with one property built in 1980 and refurbished in 2017. The site is of below average quality overall, as reflected in its CoStar rating with 2.8% of buildings rated 1, 44.4% rated 2 and 52.8% rated 3. Generally, the main industrial area along Mead Lane is of higher quality, with good parking provision, and informative signage indicating unit numbers and their occupiers. The smaller section of this employment area, to the north of the River Lee Navigation along Mill Road and Marshgate Drive contain older units, have limited parking availability, and are more difficult to navigate due to narrow roads and a lack of signage, with some units showing signs of disrepair.

- 6.2.31 Although the site is located relatively close to the town centre, accessibility constraints are evident. The majority of the site is accessed via Mead Lane, which is a dead-end road, while the estate north of the river can alternatively be accessed via Mill Road or Marshgate Drive. All access points, and entry to Mead Lane relies on a single route along Mill Road, which causes congestion issues and constrains access to the site. Mead Lane is less than 1 mile from the A414, which can facilitate connection east to the A10, and west towards the A1(M). The site is accessible for pedestrians and cyclists via the roads which feed into it, as well as from numerous footpaths around the site. In terms of public transport access, Hertford East Railway Station is less than 200m from Mead Lane, with frequent trains to London. The nearest bus stop is approximately 200m from the site, offering a range of connections to surrounding villages.
- 6.2.32 At the time of writing, there is minimal vacancy at the site with one 557sqm industrial unit vacant and being marketed within the Mead Lane Industrial Estate along Merchant Drive, and a small amount of office space (~28 sqm) being marketed within the Lock House Industrial Estate.
- 6.2.33 As shown in Table 6-4, office and industrial rents in 2025 Q4 were £230.56/sqm and £143.81/sqm respectively. Opportunities for development are limited as the site is partially bordering Hertford Conservation Area, and there are large patches of Flood Zone 3⁵⁶ around the Mead Lane Business Centre. Greenfield land lies to the north of the site, reflecting its location within the Green Belt.
- 6.2.34 The East Herts Employment Land Review⁵⁷ recommends amending the Employment Area allocation to exclude plots being developed for residential uses associated with Policy HERT2, with the remaining allocated employment land being separated to become two separate Employment Areas; one encompassing Mead Lane, and one encompassing Mill Road / Marshgate Drive.

Mimram Road

- 6.2.35 Mimram Road is a 2.2ha estate, comprising of approximately 40 units, the majority of which are appropriate for small-scale local businesses, serving the local community.
- 6.2.36 There is some housing around the site to the north, across the A414 Hertingfordbury Road, and to the north-east directly adjacent. The entire south and east of the site is surrounded by Green Belt land including Hertford's Green Finger⁵⁸. To the west, the site is bordered by treeline and railway track, making it relatively isolated from residential areas of the town.
- 6.2.37 Use Classes range from Class E to some small-scale B2 and B8 uses present. Numerous occupiers operate across the automotive industry, selling auto parts and vehicles, and offering services including repair, MOT, and valet / car wash.
- 6.2.38 Table 6-5 provides an overview of Mimram Road.

Table 6-5 Overview of Mimram Road (2025 Q4)

Number of units	Property types	CoStar Quality Rating	Office rent (£/sqm)	Industrial rent (£/sqm)	Uses
40	Industrial, retail	1-2	n/a	167.96	Auto parts store, security system services, motor vehicle dealer, exhibition planner, car wash, tyre shop, skin care clinic, martial arts club.

Source: CoStar (2026); East Herts District Council (2026) Employment Land Review.

⁵⁶ Flood Zone 3 is defined as having the highest risk of fluvial flooding. Flood Zone 3 is further broken down into Flood Zone 3a (high probability) and Flood Zone 3b (functional floodplain).

⁵⁷ East Herts Council Employment Land Review May 2026

⁵⁸ Hertford "Green Fingers" are designated areas of open, undeveloped Green Belt land that penetrate towards the town centre, providing crucial environmental and aesthetic benefits. These areas are protected under the local plan.

- 6.2.39 Buildings at Mimram Road date from 1954 to 1979, with the majority of properties built in 1975.
- 6.2.40 The site is of below average quality, as reflected by its CoStar ratings, with 8.3% of buildings rated 1 and 91.7% rated 2. The majority of the site is made up of very small, single storey terraced industrial units, which are old and appear poorly maintained. The narrow and cramped internal road layout, combined with the size and style of units, means that the site is unsuitable for large-scale businesses and/or those involving logistics. There is good signage and some parking availability throughout the site, however.
- 6.2.41 Mimram Lane is accessed via one entrance on the A414 Hertingfordbury Road dual carriageway which runs through the town, making the site relatively well connected to surrounding areas. However, access is less convenient when travelling from the west along the opposite side of the dual carriageway. The location directly on the A414 offers a link west toward the A1(M), and east toward the A10. There is a footpath running parallel to the A414 Hertingfordbury Road which provides pedestrian access to the site. The site is well-served by public transport, with a bus stop within a 10-minute walk from the entrance providing links to surrounding towns and villages.
- 6.2.42 Currently, nine small terraced industrial units remain vacant, having been marketed for a significant duration of time. The poor quality of the units, combined with the site's limited suitability for logistics occupiers, is likely further limiting demand for industrial floorspace in the estate.
- 6.2.43 As shown in Table 6-5, industrial rents in 2025 Q4 were £167.96/sqm. Since 2022 Q1, rent has marginally increased from £161.46/sqm. Opportunities for development are limited as the site borders Hertford Conservation Area and one of Hertford's Green Finger allocations under District Plan 2018. Furthermore, the majority of the site is within Flood Zone 3. The site is bordered by greenfield land, reflecting its location within the Green Belt.

Warehams Lane

- 6.2.44 Warehams Lane is a 2.5ha site made up of approximately 10 small / medium sized industrial units, and numerous parcels of land being used as storage or sales yards. The employment area encompasses industrial, and business uses along Warehams Lane, as well as some residential uses and a new Aldi supermarket in the eastern half of the allocation area.
- 6.2.45 The site is bordered by the A414 (Hertingfordbury Road) to the north and east, greenfield land to the south, and a development of three-storey blocks of flats to the west (Maple Lodge).
- 6.2.46 Use Classes range from Class E(g)(i), (iii), and Class B8. However, a large portion of the site's industrial, warehouse and office space has been lost with the Class E Aldi supermarket redevelopment, which is now separate from Warehams Lane with no internal through-access.
- 6.2.47 Table 6-6 provides an overview of Warehams Lane.

Table 6-6 Overview of Warehams Lane (2025 Q4)

Number of units	Property types	CoStar Quality Rating	Office rent (£/sqm)	Industrial rent (£/sqm)	Uses
10	Industrial, Office, Retail	1-3	164.69	108.50	Supermarket, car dealer, tyre shop, flooring shop, storage units.

Source: CoStar (2026); East Herts District Council (2026) Employment Land Review.

- 6.2.48 Buildings at Warehams Lane date from 1966 to 2020. The site is of slightly below average quality overall, as reflected by its CoStar ratings, with 20.0% of properties rates 1, 20.0% rated 2 and 60.0% rated 3. Generally, quality across the site is not very high, with some unattractive scrap / storage yards and multiple buildings which appear old and poorly maintained. Parking availability is limited, meaning cars are being parked on double yellow lines along the internal road, and signage is poor. There is also a lack of pavement to

facilitate pedestrian movement. In the centre of the site, there is a group of seven residential properties (13-25 Castle Mead Gardens), which are aesthetically out of place and not in keeping with their surrounding industrial / retail uses.

- 6.2.49 Warehams Lane is located close to the centre of Hertford on the A414 dual carriageway, making the site well connected to local areas. The location directly on the A414 offers a link west towards the A1(M), and east toward the A10. There is a footpath running parallel to the A414 which provides pedestrian access to the site and allows pedestrians to reach the town centre. In terms of public transport, there is a bus stop located approximately 300m from the entrance to Warehams Lane, providing good access to a range of bus services and links to surrounding villages and across Hertford. Additionally, Hertford North Railway Station is approximately a 10-minute walk from the site, providing quick links into London.
- 6.2.50 Since 2025 Q2, all units and plots have been occupied
- 6.2.51 As shown in Table 6-6, office and industrial rents in 2025 Q4 were £164.69/sqm and £108.50/sqm respectively. Rents have slowly increased since 2016 Q1, from £112.60/sqm for office properties and £84.28/sqm for industrial properties, indicating relatively muted growth over the period. Opportunities for development are limited as the site is surrounded by Hertford Conservation Area, and it borders one of Hertford's Green Finger allocations under District Plan 2018. Additionally, the entire site is within Flood Zone 3.
- 6.2.52 As previously noted, the Employment Area encompasses some residential uses and a new Aldi supermarket in the eastern half of the allocation area, and the East Herts Employment Land Review recommends amending the Employment Area allocation to exclude these non-employment uses, safeguarding the remaining allocated Employment Area.

Windsor Industrial Estate

- 6.2.53 Windsor Industrial Estate is a 0.5ha site, comprising of six medium-sized traditional employment units which all face directly onto Ware Road.
- 6.2.54 The estate is bordered on its west side by housing and is surrounded by Green Belt land to the north, east and west. To the south, the site is bordered by a golf course.
- 6.2.55 Use Classes include Class E(g)(i), (iii), Class B2 and Class B8. The site accommodates various businesses which require industrial and ancillary office floorspace, including vehicle servicing and merchandise sales / distribution. Five of the units incorporate industrial / warehouse floorspace and ancillary office space for administrative or operational functions. These ancillary offices are street-facing and serve as reception areas and entrances for visiting customers. The sixth unit is a separate unit to the west which incorporates office space, a retail shop, and some distribution use to the rear. Notable occupants include Kwik Fit, Halfords, HBS and Nicky Cornell.
- 6.2.56 Table 6-7 provides an overview of Windsor Industrial Estate.

Table 6-7 Overview of Windsor Industrial Estate (2025 Q4)

Number of units	Property types	CoStar Quality Rating	Office rent (£/sqm)	Industrial rent (£/sqm)	Uses
6	Industrial, Office, Retail	3	n/a ⁵⁹	160.60	Tyre shop, home furniture shop, plumbers' merchant, clothes and fabric wholesaler.

Source: CoStar (2026); East Herts District Council (2026) Employment Land Review.

- 6.2.57 The estate is of average quality overall, as reflected by its CoStar ratings, with all properties rated 3. The site is positioned on Ware Road, overlooking the valley to the north, and is highly visible from the A10. Due to the site's location, the site is relatively self-contained with minimal impact on surrounding uses. Occupiers are clear due to prominent signage, and there is adequate parking provision.

⁵⁹ No office rental data is available from CoStar.

- 6.2.58 Due to its location in between Hertford and Ware, the site is accessible from both towns. Ware Road extends east toward Ware Railway Station, and west through the centre of Hertford adjoining the A414. The site has two access points on Ware Road; one for entry and one for exit, indicated by signs. Ware Road facilitates direct access west to the A414 and access to the A10 is approximately 1.2 miles away. Pedestrians and cyclists can access the site from the west vis Ware Road, however, the uses on site are primarily catered toward customers arriving by car. In terms of public transport, the closest bus stop to the estate is less than 100m west, with extensive services running from this stop, offering a wide range of connections to surrounding villages and across Hertford. Hertford East Railway Station is also 1.3 miles to the west along Ware Road, providing a link with Central London.
- 6.2.59 There is no vacancy at the time of writing, all units are occupied and in use.
- 6.2.60 As shown in Table 6-7, industrial rent in 2025 Q4 was £160.60. Opportunities for development are limited as the site is almost entirely within 'Ware Lined Quarry' Wildlife Site. Greenfield land lies to the west of the site, reflecting its location within the Green Belt.

Pegs Lane

- 6.2.61 Pegs Lane is a 9.4ha employment area located relatively centrally in Hertford, just south of the A414. It is split into two separate sites; Wallfields, and its surrounding area, and the larger County Hall estate which forms most of the allocation and provides 18,859 sqm of floorspace.
- 6.2.62 The employment area is adjacent to some housing to the north, south, and west, with a care home to the east, and a secondary school and police station across the road.
- 6.2.63 Overall, the employment area comprises of two properties – Wallfields which is 4,723 sqm and County Hall which is 18,859 sqm. Both Wallfields and County Hall serve the primary function of the providing Class E(g)(i) offices, historically accommodating East Herts District Council (EHDC) in the Wallfields building to the north, and Hertfordshire County Council (HCC) at County Hall, which until recently was the District's largest local authority employer. Wallfields and County Hall were both submitted for mixed-use / residential redevelopment through the 2024 Call for Sites exercise but, at the time of writing, it is too early in the Local Plan process for any decisions to be taken by East Herts Council over whether either or both of these sites should be selected as potential future allocations for such proposed uses.
- 6.2.64 Table 6-8 provides an overview of Pegs Lane.

Table 6-8 Overview of Pegs Lane (2025 Q4)

Number of units	Property types	CoStar Quality Rating	Office rent (£/sqm)	Industrial rent (£/sqm)	Uses
2	Office	3	224.00	n/a	Former local government buildings.

Source: CoStar (2026); East Herts District Council (2026) Employment Land Review.

- 6.2.65 County Hall was built in 1939, and Wallfields was built in 1810, with a more modern extension added to the Grade II listed building that was completed in 1986. Neither site has been refurbished.
- 6.2.66 The employment area is of average quality overall, as reflected by its CoStar ratings, with both sites rated 3. The Pegs Lane employment area is a unique site, encompassing historic Grade II listed buildings at Wallfields and County Hall, attractive green space and vegetation, landscaped courtyards, and extensive parking. The Old Wallfields building and the original 1939 offices of County Hall are prestigious buildings, contributing to the amenity of their surroundings. Newer extensions to these buildings are considered less desirable but continue to provide available and functional employment space. Signage is good across the site, and there is an abundance of dedicated car parking space.
- 6.2.67 The Pegs Lane employment area is located relatively centrally in Hertford, just south of the A414. The site is locally accessible from multiple directions and well connected to the rest of

the town, making it highly suitable to accommodate local employment. Both Wallfields and County Hall are within 500m of the A414, which links with the A10, approximately 1.7 miles to the east, and west toward the A1(M). The site is highly accessible for pedestrians and cyclists, with pavements and the low-speed Pegs Lane providing access to both Wallfields and County Hall with zebra crossing points. The employment area is well served by public transport, with multiple bus stops in close proximity, and slightly further away which provide more frequent and extensive bus service provision in and around the town centre. Both Hertford North and Hertford East stations are approximately a 15-minute walk from the area.

- 6.2.68 Much of the floorspace across both Wallfields and County Hall is vacant and being marketed. This includes the entirety of County Hall and 1,202 sqm at Wallfields. This high vacancy is largely due to the relocation of Hertfordshire County Council who have historically occupied County Hall to Stevenage, and the marketing of certain spaces within Wallfields to accommodate new businesses in addition to East Herts District Council; the primary occupier. While vacant, County Hall has been used for non-employment generating purposes, including the filming of film and television shows. Prior to 2025 Q1, both sites were occupied and in use.
- 6.2.69 As shown in Table 6-8, office rents on average in 2025 Q4 were £224.00/sqm. The maximum rent advertised for County Hall is £232.39/sqm and the minimum is £190.09/sqm. The maximum rent advertised for Wallfields is £233.68/sqm and the minimum is £191.17. Opportunities for further development are limited given the heritage constraints including the significant Grade II listed buildings, extensive curtilage, and location within Hertford's Conservation Area.

Broadmeads

- 6.2.70 Broadmeads is a 0.7ha site in Ware consisting of two main buildings: a large building to the east including ground floor factory use and extensive office floorspace, and a large warehouse unit to the west. The site is in close proximity to the town centre.
- 6.2.71 Broadmeads is bordered to the north by the River Lead, to the east by the rear of Amwell End's high street retail uses, to the south by Amwell End car park, and to the west by 3-4 storey residential blocks (Fusion Court). The site is located within the Ware Conservation Area, which introduces constraints on the scope for redevelopment.
- 6.2.72 Use Classes include Class E(g)(i), (ii), (iii), Class B2, and Class B8. The site, including the two buildings and surrounding car parking, is wholly occupied by a single company, Farécla, which is a specialised manufacturer of polishing and surface finishing products and compounds.
- 6.2.73 Table 6-9 provides an overview of Broadmeads.

Table 6-9 Overview of Broadmeads (2025 Q4)

Number of units	Property types	CoStar Quality Rating	Office rent (£/sqm)	Industrial rent (£/sqm)	Uses
2	Industrial	3	n/a	140.15	Manufacturers.

Source: CoStar (2026); East Herts District Council (2026) Employment Land Review.

- 6.2.74 The site is of average quality overall, as reflected by its CoStar ratings, with both buildings rated 3. The overall environment of the site is attractive, with a simple layout, very good signage and internal road markings, extensive parking availability, and units which fit with their surroundings despite the industrial uses within. The warehouse unit to the west is fitted with solar PV panels, covering its entire roof, but shows some signs of disrepair with paint peeling extensively along its upper walls.
- 6.2.75 Broadmeads is located south of the River Lea, approximately 200m from the bridge which adjoins the High Street to the north. The access between Broadmeads and all areas around the north of Ware is via this bridge. Access to the A10 involves travelling 1.5 miles north-west through the town centre and along the High Street. Access to the south can be

achieved via Amwell End onto either London Road or Hertford Road. The site is accessible for pedestrians and cyclists via Broadmeads and Amwell End, which both have pavement on either side of the road and have safe crossing points. The site is a 3-minute walk from Ware's High Street across the river to the north, and reaching the south of Ware on foot / bicycle is facilitated by both a controlled crossing and a pedestrian footbridge across the railway. Broadmeads is very well served by public transport. There are three bus stops within 100m of the site which collectively offer access to extensive, frequent bus services providing links with surrounding villages, areas of Ware itself, and Heathrow Airport. The site is located close to Ware Railway Station, facilitating a strong link with central London.

- 6.2.76 As shown in Table 6-9, industrial rents in 2025 Q4 were £140.15/sqm. Rents have almost doubled since 2016 Q1, from £76.53/sqm for industrial properties. Opportunities for further development are limited given that most of the site is within Flood Zone 3 and lies within Ware Conservation Area.

Crane Mead

- 6.2.77 Crane Mead is a 2.7ha area of land on either side of Crane Mead, allocated for industry. However, approximately 1.6ha of the allocated 2.7ha has been redeveloped for residential use in recent years, significantly reducing the provision of employment-generating floorspace. Remaining employment uses are located at Crane Mead Business Park, comprising 21 units.
- 6.2.78 The remaining employment uses within the employment area are surrounded by residential apartment buildings to the north, east, and west. The site is bordered by railway track to the south, beyond which is the Marsh Lane employment area.
- 6.2.79 Use Classes include Class E(g)(i), (ii), (iii), Class B2 and Class B8. 20 of the units are described as industrial warehouse and office units, and the last unit is a singular industrial manufacturing unit adjacent to Mill Studio and the new residential apartment buildings to the west.
- 6.2.80 Table 6-10 provides an overview of Crane Mead.

Table 6-10 Overview of Crane Mead (2025 Q4)

Number of units	Property types	CoStar Quality Rating	Office rent (£/sqm)	Industrial rent (£/sqm)	Uses
21	Industrial, Office	2-3	211.94	129.81	Manufacturing, residential, waste management, tour company, car rental, estate agent, fitness centre, video production company.

Source: CoStar (2026); East Herts District Council (2026) Employment Land Review.

- 6.2.81 The site is of average quality overall, as reflected by its CoStar ratings, with 28.6% of properties rated 2, and 71.4% rated 3. Generally, the units appear relatively modern and show no sign of disrepair since their construction in 2002. The units are uniform in size and design and can be interconnected to provide more open floorspace and accommodate larger-scale business activity. Parking provision and signage on site is good, with a clear layout and two entrances along Crane Mead. The singular industrial manufacturing unit is old and relatively poor quality, however.
- 6.2.82 The site is located very centrally within the town, accessible exclusively via Crane Mead, connected to Viaduct Road which links with the High Street to the north-west, and south toward Great Amwell. The site is geographically separated from the north of Ware by the River Lea, and the south by railway tracks, but is in close proximity and very well connected to local residential areas and services. Connection to the strategic road network is relatively straightforward, involving a 1.7-mile journey south along Viaduct Road and the A1170 (London Road and Pepper Hill through Great Amwell), reaching both the A414 and A10 which collectively provide links east toward Harlow and the M11, north toward Cambridge, and south toward London. The site is highly accessible for pedestrians, via pavements along Crane Mead and due to its favourable location 500m from the town centre. Crane Mead also

facilitates cyclist access. There are various bus stops located within a 5-minute walk of the site which offer access to extensive, frequent bus services to surrounding villages, other areas of Ware, and Heathrow Airport. The site is also adjacent to Ware Railway Station, facilitating a strong link with central London.

- 6.2.83 There are currently nine vacant units at Crane Mead Business Park, previously occupied by three businesses which have recently relocated to other facilities in Hertford and Great Amwell respectively. Vacant units 4-6 comprise a singular detached, self-contained office building, which is open-plan but can be divided to provide 358 - 491sqm of floorspace. Vacant units 11-12 are interconnected to form a singular 343sqm industrial warehouse unit. Vacant units 17-20 (under offer) are interconnected to form a singular, two-storey 1,143sqm industrial warehouse unit.
- 6.2.84 As shown in Table 6-10, office and industrial rents in 2025 Q4 were £211.94/sqm and £129.81/sqm respectively. Since 2016 Q1, rents have increased from £148.33/sqm for office properties and £75.13/sqm for industrial properties, with growth remaining gradual and broadly reflective of longer-term market and inflationary pressures. Opportunities for further development may be limited as the site is entirely within Flood Zone 2.⁶⁰
- 6.2.85 Given some of the site has been redeveloped for residential use in recent years, the East Herts Employment Land Review recommends amending the Employment Area allocation to exclude the land redeveloped for residential use, safeguarding the remaining Crane Mead Business Park.

Ermine Point / Gentlemen's Field

- 6.2.86 Ermine Point / Gentlemen's Field is a 1.3ha mixed-use site located at the north-western edge of Ware. It comprises of two small, detached office buildings, 12 industrial warehouse units which range in size, and an open-air storage yard.
- 6.2.87 The site is very well contained, almost entirely surrounded by greenfield land other than some detached homes across Westmill Road to the south-west.
- 6.2.88 Employment floorspace at the site is flexible, but is predominantly suited for, and occupied by businesses focused on Use Class B2 industrial manufacture / fabrication, and Use Class B8 storage and distribution, with some smaller areas of Use Class E(g)(i), (ii), and (iii) in the adjacent High Oak Business Centre office building.
- 6.2.89 Table 6-11 provides an overview of Ermine Point / Gentlemen's Field

Table 6-11 Overview of Ermine Point / Gentlemen's Field (2025 Q4)

Number of units	Property types	CoStar Quality Rating	Office rent (£/sqm)	Industrial rent (£/sqm)	Uses
12	Industrial, Office	2-3	199.46	144.45	Veterinarian, car dealer, storage facility, manufacturer, printing shop, waste management.

Source: CoStar (2026); East Herts District Council (2026) Employment Land Review.

- 6.2.90 Buildings at Ermine Point / Gentlemen's Field were all built in the 1980s. The site is of below average quality overall, as reflected by its CoStar ratings, with 83.3% of properties rated 2 and 16.7% rated 3. Despite the age of the properties, they appear in good condition. There is good signage at the site's entrance on Westmill Road, and units are clearly numbered, but occupiers of the offices within the High Oak Business Centre building could be more clearly indicated. There is sufficient provision of parking across the site and there are street lighting and pavements along the internal road, as well as vegetation in and around the site contributing to its amenity.
- 6.2.91 Gentlemen's Field is located on the A602 at Westmill Road to the north-west of Ware, just across the A10. Adjacent to the site's entrance is Westmill Interchange, providing a

⁶⁰ Flood Zone 2 represents land with a medium probability of flooding, typically indicating a 1 in 100 to 1 in 1,000 annual chance of river flooding.

connection directly toward the High Street of Ware and the town centre. The site is extremely well connected with the strategic road network, as the Westmill Interchange junction facilitates access to the A414, A120, M11, and M25. Pedestrian access from Ware is made feasible by signal controls and tactile paving pedestrian crossing points at the Westmill Interchange junction. The junction is not recommended for cyclists. The site is poorly connected by public transport with the nearest bus stop approximately 300m away, but has very limited and infrequent services, and Ware Railway Station is located a 35-minute walk to the south-east.

- 6.2.92 There are currently three very small office spaces vacant and being marketed within the High Oak Business Centre office buildings, totalling 65 sqm.
- 6.2.93 As shown in Table 6-11, office and industrial rents in 2025 Q4 were £199.46/sqm and £144.45/sqm respectively. Rental growth since 2016 Q1 has remained steady but relatively modest from £136.06/sqm and £81.81/sqm for office and industrial properties respectively. Opportunities for further development are limited given the site is located on a Historic Landfill Site and borders a Priority Habitats Inventory site. The eastern corner of the site is at high risk of flooding from surface water. The site is bordered by surrounding greenfield land due to its location within the Green Belt.

Marsh Lane

- 6.2.94 Marsh Lane is a 7.5ha long-standing estate, consisting of relatively large industrial warehouse units and open-air storage yards.
- 6.2.95 The site is well-contained, surrounded by greenfield land and treeline, other than the railway track bordering along its north-eastern side.
- 6.2.96 Use Classes include Use Class E(g)(i), (ii), and (iii), Use Class B2, and Use Class B8. Notable occupiers include Royal Mail, Arriva UK Bus, and EFF Group.
- 6.2.97 Table 6-12 provides an overview of Marsh Lane.

Table 6-12 Overview of Marsh Lane (2025 Q4)

Number of units	Property types	CoStar Quality Rating	Office rent (£/sqm)	Industrial rent (£/sqm)	Uses
20+	Industrial, Office, Retail	2-3	220.77	132.93	Shipping and postal services, furniture shop, machinery hire, central heating service, storage facility, transportation service, leisure centre, engineer, hotel.

Source: CoStar (2026); East Herts District Council (2026) Employment Land Review.

- 6.2.98 Buildings at Marsh Lane date from 1962 to 2017. The estate is of average quality overall, as reflected by its CoStar ratings, with 31.3% of properties rated 2 and 68.7% rated 3. Quality across the site varies but overall is hindered by the presence of old industrial units, cluttered and highly visible scrap / storage yards, and a seemingly poorly maintained general environment. Many units would benefit from improvement – two units to date have been retrofitted with solar PV panels. Signage at the entrance to Marsh Lane and across the site is poor, and parking provision is fairly limited meaning the majority of cars are parked on Marsh Lane itself, narrowing and constricting access.
- 6.2.99 The estate is accessed exclusively via the entrance to Marsh Lane on Viaduct Road, located 500m south-east from the town centre High Street. The site entrance is beside a junction with London Road, which facilitates access from the south of Ware, Hertford to the west, and Amwell to the south. Signage at the entrance to the site is poor, only indicating the hotel and restaurant uses. Connection to the strategic road network involves a 1.5-mile journey south along the Viaduct Road and the A1170, reaching both the A414 and A10 which collectively provide links east toward Harlow and the M11, north toward Cambridge, and south toward London. The site is accessible for both pedestrians and cyclists. The estate is well-served by public transport, with bus stops within 400m of the site, which collectively

provide links with surrounding towns and villages, as well as further beyond to Harlow, St Albans, Watford and Heathrow Airport. The site is also in close proximity, approximately 500m, to Ware Railway Station, facilitating a strong link with central London.

- 6.2.100 There is minimal vacancy within the site, with one 274 sqm business / office unit at the Peerglow Centre currently being marketed.
- 6.2.101 As shown in Table 6-12, office and industrial rents in 2025 Q4 were £220.77/sqm and £132.93/sqm respectively. Opportunities for further development are limited given the relatively new hotel site as the western side of Marsh Lane borders Ware Conservation Area, and is within the Lee Valley Park area allocated under District Plan 2018. The entire employment area is within Flood Zone 2. Greenfield land surrounds almost the entire site, reflecting its location within the Green Belt and close proximity to the Lee Valley Park.
- 6.2.102 A previously vacant parcel of the allocated Employment Area, adjacent to its entrance on Viaduct Road, has been developed in recent years to provide a hotel, restaurant, youth centre, and recreational space. Accordingly, the East Herts Employment Land Review recommends amending the Employment Area allocation to exclude this area redeveloped for non-employment uses, safeguarding the remaining Employment Area allocation.

Park Road / Harris's Lane (GSK Ware)

- 6.2.103 Park Road / Harris's Lane is a large 19.0ha campus-style site, home to GlaxoSmithKline (GSK). The site is located to the west of Ware's town centre.
- 6.2.104 The site is embedded within the town, and is therefore bordered by various residential, commercial, retail, and educational buildings to the north and east, across Park Road and toward the town centre.
- 6.2.105 GSK is a prominent, multinational pharmaceutical and biotechnology company which operates this site in Ware as a research, development, and manufacturing facility. GSK Ware plays a notable role within Ware's economy, accounting for a substantial proportion of the town's industrial and office floorspace, and serving as the district's largest single private employer. The hundreds of jobs generated by GSK in Ware help contribute to the wider local economy, despite significant proportions of employees likely commuting in from elsewhere outside the town.
- 6.2.106 In addition, ex-GSK laboratory and manufacturing space has been re-purposed by Riverlabs as a 28 acre, advanced science and innovation campus offering up to 96,742 sq ft (8,988 sqm) of high specification laboratory and manufacturing floorspace. Up to 460,000 sq ft (42,735 sqm) of lab, office, and manufacturing space is anticipated through future phases of development⁶¹.
- 6.2.107 The site represents a unique provision within the district, accommodating highly specialised scientific and technical industry, stimulating significant high-skilled and highly qualified jobs.
- 6.2.108 Table 6-13 provides an overview of Park Road / Harris's Lane (GSK Ware).

Table 6-13 Overview of Park Road / Harris's Lane (GSK Ware) (2025 Q4)

Number of units	Property types	CoStar Quality Rating	Office rent (£/sqm)	Industrial rent (£/sqm)	Uses
n/a	Industrial, R&D, Office	2-3	n/a	131.53	Pharmaceuticals and biotechnology.

Source: CoStar (2026); East Herts District Council (2026) Employment Land Review.

- 6.2.109 Buildings at Park Road / Harris's Lane date from 1989 to 2014, with three properties originally built in 1990, 2001, and 2014 refurbished in 2025.
- 6.2.110 The site is of average quality overall, as reflected by its CoStar ratings, with 37.5% of buildings rated 2 and 62.5% rated 3. The environment is well maintained with extensive car

⁶¹ <https://www.riverlabsware.com/campus-vision/>

parking provision, serving the thousands of staff and visitors, and has improved with recent redevelopment. The site is surrounded by vegetation with a sophisticated layout incorporating green space and high amenity communal seating spaces along the River Lead, clear signage, good security measures, and a sports and social club.

- 6.2.111 The site is embedded within the urban fabric of Ware and is well connected to the local area. The site is in close proximity to residential areas, pedestrian routes, and retail and service opportunities across town. The site is located 1 mile from the Westmill Interchange junction with the A10 and A602 which provide links with Stevenage, Cambridge and London. The site is highly accessible for both pedestrians and cyclists from all directions and areas of the town, with bicycle parking facilities available for staff. The site has average public transport connections, with bus stops adjacent to the site providing links around town and links from Watton Road to wider connections. More frequent bus services are available in the town centre which is a 15-minute walk from the site, providing links with surrounding villages, as well as towards London and Heathrow Airport. Ware Railway Station is located a 15-minute walk from the site, providing a connection by train with Central London.
- 6.2.112 As shown in Table 6-13, industrial rent in 2025 Q4 was £131.53/sqm. Rents have gradually increased since 2016 Q1 from £80.30/sqm. Opportunities for future development are constrained as buildings on the eastern part of the site fall within the Conservation Area and, the entire eastern half of the employment area is within an Area of Archaeological Significance. The portion of the employment area to the south of Priory Street is within Flood Zone 2, with small overlap with Flood Zone 3. The site is almost entirely surrounded by Green Belt, including the River Lea corridor and adjacent open greenfield land to the south. However, as noted above, Riverlabs has plans for a multi-phase transformation of 440,000 sqft of ex-GSK lab and manufacturing space, and new purpose-built space within the site.

Star Street

- 6.2.113 Star Street is a 0.5ha local industrial site comprising four single storey, small, and old industrial units beside the River Lea.
- 6.2.114 Unlike other employment sites assessed in this study, no CoStar market data is available for this site. This reflects its small scale and limited transaction history, meaning it falls below the threshold of properties actively tracked by CoStar. As a result, the standard overview table has not been included for this site. The absence of market data limits the ability to assess vacancy, rental values or market trends specific to this location, which introduces some uncertainty into the assessment of its current performance and future potential.
- 6.2.115 The site is bordered by the River Lea to the east and south, and housing across Star Street to the north. Adjacent to the west, there is a pub and some 3-4 storey residential apartment buildings along Lygean Avenue.
- 6.2.116 The main unit on site has longstanding been occupied by Star Street Garage, offering vehicle repair, sales, and services, while the only other identifiable business present on site is a 'escape room'. Use and occupancy of other units is unclear.
- 6.2.117 The site is of relatively poor quality overall, comprising old, small single-storey industrial warehouse units which do not appear well maintained, and are limited in terms of industrial or business capacity. The environment within the site is congested and has access constraints due to an abundance of disorderly car parking exacerbated by vehicles overflowing from Star Street Garage, a poorly paved internal road, and poor signage causing a lack of clarity over which businesses are operating within the site.
- 6.2.118 The site is accessed from Star Street, which provides a direct route eastwards towards the wider town, and westwards to the town centre and High Street. The location of the site in relation to the strategic road network is on the side of the town with less favourable access as it involves travelling approximately 2 miles through the congested town centre to the A10 and A414. The site is accessible for pedestrians and cyclists along Star Street. The bus stop adjacent to the site is limited in its provision of services, but bus stops towards the town centre a 10-minute walk away provide comprehensive links with surrounding towns and

villages, as well as south toward London and Heathrow Airport. Ware Railway Station is also located a 10-minute walk from the site, providing a connection by train with central London.

- 6.2.119 Occupancy of the site is generally unclear due to poor signage, through all units appear to be in use. Vacancy is being advertised and marketed, with a lack of clarity on which units and how much floorspace is available.
- 6.2.120 CoStar returns no available data for Star Street, so the rental value is undetermined. The site assessment concluded that floorspace at the site is minimal and only suitable for small-scale local enterprise at presumably affordable rates. Opportunities for further development are limited as the site is entirely within an Area of Archaeological Significance and borders a Grade II listed building to the west. Further, the site is almost entirely within Flood Zone 3, with the highest risk of fluvial flooding. To the east, the site borders the Lee Valley Regional Park, and a large Wildlife Site. Green Belt land borders the site to the east.

Oakley Horseboxes (High Cross)

- 6.2.121 Oakley Horseboxes in High Cross is a 1.4ha village employment area exclusively occupied by a family-run company of the same name dating back to 1947.
- 6.2.122 The site is bordered by housing to the north, north-east, and north-west. The site is surrounded by greenfield land otherwise due to its position at the southern edge of High Cross.
- 6.2.123 Oakley Horseboxes is the sole occupier of the site. They build high quality, luxury coaches and horseboxes which they distribute nationally and export internationally. Use Classes include E(g)(i), (ii), Use Class B2, and Use Class B8.
- 6.2.124 Table 6-14 provides an overview of Oakley Horseboxes.

Table 6-14 Overview of Oakley Horseboxes (2025 Q4)

Number of units	Property types	CoStar Quality Rating	Office rent (£/sqm)	Industrial rent (£/sqm)	Uses
n/a	Industrial	3	n/a	136.38	Manufacturer of luxury coaches and horseboxes.

Source: CoStar (2026); East Herts District Council (2026) Employment Land Review.

- 6.2.125 The site is of good quality overall, as reflected by its CoStar ratings, with all buildings rated 3. The site is well tailored for the specialist manufacturing and horsebox storage needs of Oakley Horseboxes, including a large factory building retrofit with solar PV panels and recently repaved open-air yard. In addition, Oakley Horseboxes has a parking area beside its entrance which has sufficient provision, and a communal grass area including benches, trees, and vegetation which improves amenity within the site. The entrance along Cambridge Road is sufficiently wide, incorporating signage and attractive brickwork.
- 6.2.126 Oakley Horseboxes is located within High Cross, a Group 2 village⁶², with its entrance on Cambridge Road which runs north through Colliers End joining the A10, and south through Wadesmill and Thundridge into Ware, approximately 2 miles away. The site is relatively well connected to the A10 which is accessible approximately 1.3 miles to the south along Cambridge Road which is sufficient in width and quality to support large commercial vehicles, and the transportation of horseboxes. Pedestrian access is facilitated by pavement along Cambridge Road, which extends in both directions to provide connections with Wadesmill and Thundridge to the south, in addition to High Cross immediately to the north. Cyclist access is considered feasible for local residents. In terms of public transport, there is a bus stop located around 300m north of the site's entrance, but this offers access only to a singular, relatively infrequent service running between Hertford, Ware, Buntingford, Royston, and various villages. However, the village is also served by the HertsLynx on demand bus

⁶² East Herts District Council define a Group 2 Village as a generally smaller village where limited infill development, together with small-scale employment, leisure, recreation and community facilities will be permitted.

service which opens up opportunities for wider travel in the locality, including Stevenage and Bishop's Stortford in addition to the towns above and other villages.

- 6.2.127 The site has been wholly occupied by Oakley Horseboxes since 1947.
- 6.2.128 As shown in Table 6-14, industrial rent in 2025 Q4 was £136.38/sqm. Since 2016 Q1, rents have increased from £74.27/sqm, reflecting gradual long-term growth broadly in line with wider market conditions. The site is partially within an Area of Archaeological Significance, which, while not an absolute constraint on further development, would require appropriate archaeological assessment and mitigation to be undertaken as part of any future development proposals at the site.

Thundridge Business Park

- 6.2.129 Thundridge Business Park is a 1.2ha site, south of Wadesmill and High Cross, comprising of approximately 11 units.
- 6.2.130 The site is bordered by Thundridge Church to the north. There are some residential uses in other directions, which are separated from Thundridge Business Park by a significant buffer of larger trees and vegetation making it sufficiently contained.
- 6.2.131 The units across the site collectively provide flexible industrial warehouse floorspace for business across Use Class B2 and Use Class B8, as well as some smaller-scale Use Class E(i), (ii), and (iii) floorspace. Numerous adjacent units are internally connected and occupied by a single business, dictating that the site currently accommodates seven businesses across its 11 units.
- 6.2.132 Table 6-15 provides an overview of Thundridge Business Park.

Table 6-15 Overview of Thundridge Business Park (2025 Q4)

Number of units	Property types	CoStar Quality Rating	Office rent (£/sqm)	Industrial rent (£/sqm)	Uses
11	Industrial, Office	3	n/a ⁶³	126.80	Construction, IT and support services, plumber, electrician.

Source: CoStar (2026); East Herts District Council (2026) Employment Land Review.

- 6.2.133 The site is of good overall quality, as reflected by its CoStar ratings, with all buildings rated 3. The site comprises of buildings which are in reasonable condition and serve their primary function of providing village employment floorspace, which is flexible for businesses. Multiple industrial warehouse units have been internally connected, creating a larger space for a single business to operate within. The site has a clear entrance on Cambridge Road, good signage both as its entrance and across the buildings to indicate unit numbers, and sufficient provision of parking space for staff and visitors. The site is contained by large surrounding trees which minimises hinderance to the amenity of the village and makes traditional industrial B2 uses feasible.
- 6.2.134 Thundridge Business Park is located within Thundridge, a Group 2 village, along Cambridge Road which runs through various villages parallel to the west of the A10. Cambridge Road becomes Wadesmill Road to the south, which provides a strong connection with Ware approximately 1 mile away. The A10 can be accessed 800m to the south of the site along Cambridge Road. Pedestrian access to the site is facilitated by pavement along Cambridge Road, which extends in both directions through Thundridge and Wadesmill, and north to High Cross. Cyclist access is considered feasible for local residents. In terms of public transport, there is a bus stop located 100m from the site's entrance, but this stop only offers access to a singular, relatively infrequent service running between Hertford, Ware, Buntingford, Royston, and various villages. However, the village is also served by the HertsLynx on demand bus service which opens up opportunities for wider travel in the

⁶³ Office rental data for Thundridge Business Park is not available on CoStar.

locality, including Stevenage and Bishop's Stortford in addition to the towns above and other villages.

6.2.135 All units at the site are occupied and in use.

6.2.136 As shown in Table 6-15, industrial rents in 2025 Q4 was £126.80/sqm. Rents have almost doubled since 2016 Q1 from £69.10/sqm. The site is within the Green Belt and opportunities for further development are limited as the site borders Thundridge and Wadesmill Conservation Area to the north, with some areas of the site at high risk of flooding from surface water. Development adjoins the site to the south and woodland is located to the east.

Overview

6.2.137 The 16 employment areas comprise some larger strategic sites which incorporate multiple estates or extensive single-occupier campuses, and some very small sites which accommodate smaller-scale local businesses and services. Overall, they are generally considered to be performing well and meeting needs for employment space and premises. There is a good range of building and unit types including new employment premises at locations such as Caxton Hill, indicating the viability of new development locally. Vacancy is limited when considered overall, although there are higher levels at some locations associated with newly developed premises awaiting occupation, public sector relocations, or older lower quality stock. This nevertheless points to generally healthy market operation across the wider portfolio of sites. Opportunities for intensification and expansion are limited on most sites due to levels of site occupancy, constrained layouts, and proximity to surrounding uses, including sensitive uses in some instances. A limited presence of non-employment uses is evident on certain sites, reflecting the flexibility of the E Use Class. In Hertford and Ware, these non-employment uses most commonly include a mix of trade-counter and contractor-based operations, small-scale leisure or community uses, health and fitness studios, and specialist consumer-facing activities. However, given generally low vacancy levels and the importance of safeguarding an adequate supply of employment premises, the occupation of space by non-employment users should be monitored to ensure the continued availability of employment land and floorspace.

6.3 Hertford Town Centre

6.3.1 Hertford's town centre plays an important role in providing office space in East Herts, reflecting its status as the administrative centre of the District and its strong transport connectivity. The town benefits from two railway stations – Hertford East with direct services to London Liverpool Street and less frequently to Stratford, and Hertford North with services to London Moorgate and less frequent services to King's Cross. Hertford is also strategically connected via road as the A10 provides north-south connectivity between London and Cambridge, and the A414 links to town to Harlow, Hatfield, and the M11 and A1(M). The town centre's concentration of amenities, public sector uses, and professional services also acts as a key attractor for office occupiers.

6.3.2 The town centre provides a range of office spaces, ranging from c. 10 sqm to 718 sqm. In total there are 63 office properties in the Hertford town centre, the majority of which are low to average quality.

Table 6-16 Overview of Hertford Town Centre

Number of properties	Property types	CoStar Quality Rating	Office rent (£/sqm)	Vacancy rate (%)	Uses
63	Office	1-3	200.60	0.8	Professional services; public administration; financial services; real estate

Source: CoStar (2026).

6.3.3 Office properties in Hertford town centre are generally characterised by a historic built environment, with the majority of buildings for which data is available having been constructed before 1960, with some dating as far back as the 1620s. Consistent with this, only five properties are purpose-built for office use, with the stock instead dominated by office conversions and space provided above retail units, which together account for approximately 92% of office properties.

6.3.4 Office market rents in the town centre current stand at £200.60/sqm. Vacancy rates are very low at 0.8%, with only one property in the town centre (Dimsdale House on Fore Street) currently recording available space. However, as set out in Section 5.2, feedback from agents has indicated that office space has been converted to other uses such as residential and may not be actively marketed which may have contributed to keeping rates low following the impact of the Covid-19 pandemic, with demand for office space muted.

6.4 Ware Town Centre

6.4.1 Ware's town centre provides a more limited, though nonetheless locally important, office offer within East Herts. Located immediately to the east of Hertford along the River Lea corridor, the town benefits from a railway station on the Hertford East line with direct services to London Liverpool Street and less frequently to Stratford, alongside bus connections to Hertford, Stevenage and surrounding settlements. The A1170 and proximity to the A10 provide strategic north-south road connectivity, supporting commuting flows both into and out of the town. The town centre provides office space ranging from 20 sqm to 966 sqm. In total there are 22 office properties in Ware town centre, the majority of which are of average quality.

Table 6-17 Overview of Ware Town Centre

Number of properties	Property types	CoStar Quality Rating	Office rent (£/sqm)	Vacancy rate (%)	Uses
22	Office	2-3	198.31	1.3	Professional services; business services; real estate

Source: CoStar (2026).

6.4.2 Office properties in Ware town centre are a mixture of office conversions and purpose-built office accommodation, with the latter accounting for three of the ten properties.

6.4.3 Office market rents in Ware town centre currently average £198.31/sqm, derived from CoStar estimated rents across the stock. This is broadly comparable to, though marginally below, the £200.60/sqm recorded in Hertford town centre, which is consistent with Ware's more limited office offer and smaller stock. The vacancy rate stands at 1.3%, however agents identified limited demand for office floorspace in Ware town centre.

7. Land for Employment Development

7.1 Introduction

- 7.1.1 This section of the report examines the land for employment development in and around Hertford and Ware to understand the potential and need for employment development, what employment land is available elsewhere in Hertford and Ware, and the suitability and attractiveness of that land for commercial development for different uses.

7.2 Employment Development

- 7.2.1 The East Herts District Plan (2018) included the provision of 19-20 hectares of new employment land across a number of locations in the District.
- 7.2.2 Policy WARE1 identifies that Ware will accommodate 3 hectares of employment land for B1 (now E(g)) uses within the development at North and East of Ware (WARE2), a mixed-use development site anticipated to create a new sustainable community which connects and complements the existing town.
- 7.2.3 Policy HERT1 details that new employment development in Hertford would be delivered through 3,000 sqm of B1 employment floorspace or other employment generating uses that would be compatible with the uses on neighbouring land, in the Mead Lane Area (HERT2) as part of a mixed-use development. However, a subsequent appeal decision relating to the site (3/18/2465/OUT) reduced the amount of employment floorspace to 2,220 sqm of employment floorspace. So, while no detailed application for the employment element of the HERT2 site has yet come forward, it is not expected that any future proposals would exceed the outline permission floorspace.
- 7.2.4 Subsequently, the redevelopment of land and buildings at Hertford Industrial Estate, Caxton Hill to form the Hertford Logistics Hub has also received approval (3/22/2200/FUL) and is currently under construction. The scheme comprises of 16 Grade A logistics units, providing nearly 21,000 sqm of industrial floorspace.
- 7.2.5 Potential employment development at Land North and East of Ware (WARE2), the mixed use development at Mead Lane (HERT2) and through the delivery of the Hertford Logistics Hub (3/22/2200/FUL) has been considered to identify potential employment growth. This is set out for each site in-turn below.

Land North and East of Ware

- 7.2.6 A Masterplanning Framework Document⁶⁴ was prepared in relation to the Land North and East of Ware in September 2019. This set out plans for four distinct “neighbourhoods”, with illustrative options identifying flexible employment uses to be provided within community hubs in three of the four neighbourhood centres.
- 7.2.7 Subsequently, a hybrid planning application for the development of this site was submitted in November 2022 (3/22/2406/FUL). This included the development of 1,800 homes, and inter alia around 3 hectares of new employment provision, with 24,000 sqm of Class E floorspace set out within the application documentation, though this was not broken down by location or specific use class. At the time of writing, this application is set to be revised, with amendments expected to reflect updates to plans and supporting documents since the submission date nearly four years ago. As the application is hybrid/outline only at this time, the final configuration of the employment provision will be determined through the detailed application process, where full delivery would be expected in order to comply with the provisions of District Plan Policy WARE2 and the adopted Masterplanning Framework, 2019.

⁶⁴ Land North & East of Ware A Sustainable Urban Extension Masterplanning Framework Document September 2019

7.2.8 It is relevant to the development of policy for Hertford and Ware to know how many jobs could be created should this land be developed for employment uses. In order to make this calculation, a number of assumptions are required, as detailed below:

- **Use Class** – The proportion of the land likely to be developed and associated floorspace will depend on the use class that is likely to be accommodated on site. The current planning application assumed that employment development would relate to Class E uses, while the District Plan (2018) identified that the land would be developed for B1 uses, corresponding to use classes E(g)(i), E(g)(ii) and E(g)(iii). Given this range, and the uncertainty relating to the revised planning application in relation to the site, a range of scenarios are adopted to align with potential uses across the site:
 - **Scenario 1:** This scenario assumes 24,000 sqm of E class floorspace is developed, with 10% for office [E(g)(i), formerly B1(a)] use, 40% for light industrial [E(g)(iii), formerly B1(c)] use and 50% as E-Class uses that fall outside of the definition of employment land (i.e. non E(g)).
 - **Scenario 2:** This scenario assumes a split of 20% office [E(g)(i), formerly B1(a)] and 80% light industrial [E(g)(iii), formerly B1(c)] use.
 - **Scenario 3:** This scenario assumes a split of 25% office [E(g)(i), formerly B1(a)] and 75% light industrial [E(g)(iii), formerly B1(c)] use, on 50% of the land allocated for employment use.

It is important to note that the split of uses is ultimately indicative for the purpose of estimating the potential employment that could be supported. The employment land allocation could, in practice, accommodate any eventual split across the E(g) employment land use classes including all being within one use class.

- **Plot Ratio** – For Scenario 1, the gross E class floorspace included in the current planning application is taken forward (i.e. 24,000 sqm). However, Scenarios 2 and 3 are underpinned by the application of plot ratios, which identify the capacity of land to accommodate floorspace, expressed as the ratio of total development floor area to site area. There is some available evidence from research studies and many planning authorities use their own ratios, derived from design studies and measurement. In general, for industrial uses a plot ratio of 0.35-0.45 is relevant for light and general industrial uses, with 0.4-0.6 for warehousing and storage uses and 0.75 to 2.00 for office uses depending on the location of development⁶⁵. Having reviewed the employment land evidence in East Herts and neighbouring authorities, a plot ratio of 0.4 for E(g)(iii) and B2 uses is assumed; alongside a plot ratio of 0.5 for B8 uses and 0.75 E(g)(i) uses⁶⁶.
- **Employment Densities** – Having applied plot ratios to calculate the total development floorspace associated with the available land, this can then be converted to employment through the application of employment densities. These are applied in line with HCA Employment Density Guide 3rd Edition (2015), as summarised below:

Table 7-1 Employment density assumptions

Use class	Employment Density	Employment density assumption used (sqm per job)
E(g)(i)	Office – 13 sqm NIA per FTE job	13
E(g)(iii)	Light industrial – 47 sqm NIA per FTE job	47
B2	Industrial & Manufacturing – 36 sqm GIA per FTE job	36
B8	Storage & Distribution – 70-95 sqm GEA per FTE job	70

Source: HCA Employment Density Guide (2015).

⁶⁵ OPDM Employment Land Reviews: Guidance Note 2004

⁶⁶ This is consistent with the approach to employment land studies in North Hertfordshire and Welwyn Hatfield as neighbouring authorities.

- **The ratio of external to internal areas** – The application of plot ratios allows the gross external area (i.e. the whole area of a building taking each floor into account⁶⁷) to be calculated. As shown in Table 7-1, the employment densities vary in their application, from net internal area (light industrial), gross internal area (general industrial) and gross external area (warehousing and storage). As such, for light industrial and office floorspace, adjustments are required to convert the floorspace to NIA, while general industrial floorspace is converted to GIA. A 1:0.95 conversion ratio is assumed for GEA to GIA is assumed; with a similar 1:0.8 conversion ratio for GIA to NIA⁶⁸.

7.2.9 The application of the above assumptions is set out in Table 7-2. The analysis suggests that, if the vacant land were to be developed, additional employment of 237 – 474 FTE jobs could be generated in Hertford and Ware.

7.2.10 However, it should be noted that these figures are only measures of capacity based on potential scenarios, not the likelihood of delivery. The market appeal of the site can differ very substantially, and this will have a major bearing on actual delivery of employment floorspace and the actual creation of jobs.

Table 7-2 Estimate of FTE Jobs Generated by the Development of Vacant Land at North and East of Ware

Scenario	Use Classes	Site Area	Total E(g) Floorspace	Total FTE Employment
Scenario 1	E(g)(i) / E(g)(iii)	3.0	12,000	389
Scenario 2	E(g)(i) / E(g)(iii)	3.0	14,625	474
Scenario 3	E(g)(i) / E(g)(iii)	1.5	7,313	237

Mead Lane/Land East Of Marshgate Drive

7.2.11 Policy HERT2 identified the development of around 3,000 square metres of B1 employment floorspace, or other employment generating uses that would be compatible with the uses on neighbouring land, to be provided at the Mead Lane Area, Hertford, site, as part of a mixed-use development. This was subject to future masterplanning in accordance with, the provisions of the Mead Lane Urban Design Framework⁶⁹.

7.2.12 A subsequent hybrid application (3/18/2465/OUT) was approved in March 2020 which included 70 sqm of residents co-working floorspace and outline permission for the construction of 2,220 square metres of employment floorspace (Use Class B1c – now E(g)(iii)).

7.2.13 However, the outline permission pertaining to the development of the 2,220 square metres of B1c – now E(g)(iii) floorspace has now lapsed. Therefore, there is potential for the use classes or the quantum of land/floorspace developed for employment use to change. Given that permission was previously granted for 2,200 square meters of employment floorspace, this is taken forward to estimate the potential employment that could be generated.

7.2.14 A number of potential scenarios are therefore set out against the total floorspace:

- Scenario 1: This scenario assumes the 2,200 sqm of floorspace is developed for light industrial (E(g)(iii)) use.
- Scenario 2: This scenario assumes 50% of space comes forward for general industrial (B2) and 50% for warehousing and storage (B8) use.
- Scenario 3: This scenario assumes 25% of floorspace is developed for light industrial (E(g)(iii)) use, 25% for general industrial (B2) use and 50% for warehousing and storage (B8) use.

⁶⁷ VOA Code of measuring practice: definitions for rating purposes

⁶⁸ HCA Employment Density Guide (2015)

⁶⁹ Mead Lane Urban Design Framework December 2014

- 7.2.15 Applying the assumptions set out in Table 7-1, the analysis suggests that between 43 and 47 FTE jobs could be generated by the employment land use classes at the Mead Lane Area, depending on the scenario. This is set out in Table 7-3.

Table 7-3 Estimate of FTE Jobs Generated by the Development of Vacant Land at the Mead Lane Area

Scenario	Floorspace (sqm) ⁷⁰	Total FTE Employment
Scenario 1	2,200	47
Scenario 2	2,200	46
Scenario 3	2,200	43

Hertford Logistics Hub, Caxton Hill

- 7.2.16 The redevelopment of land and buildings at Hertford Industrial Estate is also currently under construction, with planning having been initially approved in September 2023 (3/22/2200/FUL).
- 7.2.17 The Hertford Logistics Hub scheme comprises of 16 Grade A logistics units of which 7 are existing high-quality facilities that have been extensively refurbished with units ranging from 524 sqm to 3,950 sqm. In total, the development provides nearly 21,000 sqm of industrial floorspace, representing an increase in the intensity of the site, which previously housed 12,650 sqm of floorspace. 5 units are let and occupied on the site at the time of writing, and are therefore excluded from the analysis.
- 7.2.18 Applying the assumptions set out in Section 7.2.8, the analysis suggests that 65 FTE jobs could be generated by the additional employment floorspace delivered on the site, recognising some floorspace relates to refurbished units. This is set out in Table 7-4.

Table 7-4 Estimate of Additional FTE Jobs Generated through the Hertford Logistics Hub

Development	Floorspace (sqm) ⁷¹	Total FTE Employment
Hertford Logistics Hub	4,576	65

7.3 Summary

- 7.3.1 Taken together, the analysis suggests that the development of Land at North and East of Ware, Mead Lane/Land East Of Marshgate Drive and Hertford Logistics Hub could result in the generation of between 345 and 582 FTE jobs across the employment land use classes.

Table 7-5 Summary of Potential Employment Generated by Vacant Land and Pipeline Supply

Site	Floorspace		FTE Jobs	
	Low	High	Low	High
Land at North and East of Ware	7,313	14,625	237	474
Mead Lane / Land East Of Marshgate Drive		2,200	43	47
Hertford Logistics Hub		4,576		65
Total	14,088	21,401	345	582

- 7.3.2 If delivered, these jobs would represent growth of 1.3-2.1% on current workplace employment in Hertford and Ware. However, it should be recognised that additional jobs

⁷⁰ Note: Given no measurement classification is provided in relation to the floorspace, the ratio of external to internal areas is unknown and no conversion has been made for the purpose of this analysis.

⁷¹ Note: Given no measurement classification is provided in relation to the floorspace, the ratio of external to internal areas is unknown and no conversion has been made for the purpose of this analysis. The figure of 4,576 sqm is the additional floorspace (i.e. 20,910 sqm associated with the development minus the 3,685 sqm already let and occupied and the 12,650 sqm of existing floorspace on site prior to its redevelopment). Any difference due to rounding.

could also be delivered across non-employment uses such as retail, food and beverage and healthcare.

8. Conclusions and Recommendations

8.1 Introduction

- 8.1.1 This section of the report presents our conclusions and recommendations based on the analysis in the preceding sections and outlines a potential strategy for the development of employment land in Hertford and Ware.
- 8.1.2 The conclusions and recommendations of the Study are framed around a series of questions. These are as follows:
- Is it desirable to increase the number of jobs in Hertford and Ware?
 - What sort of jobs could be attracted or developed in Hertford and Ware?
 - What actions need to be taken to achieve the desired outcomes?

8.2 Is it desirable to increase the number of jobs in Hertford and Ware?

- 8.2.1 As set out in the NPPF, the purpose of the planning system is to contribute to the achievement of sustainable development, including the provision of homes, commercial development and supporting infrastructure in a sustainable manner. In this regard, it is important to support an appropriate mix of uses across an area, and within larger scale sites, to minimise the number and length of journeys needed for employment, shopping, leisure, education and other activities.
- 8.2.2 The analysis set out within this report has highlighted a notable loss of employment floorspace in Hertford and Ware over the past decade, with an overall loss of 23,000 sqm across office (-2,000 sqm), industrial (-12,000 sqm) and warehousing and storage (-9,000 sqm) uses. There is the potential for further losses in Hertford and Ware, with the former Hertfordshire County Council premises at Pegs Lane (10.35ha, providing 21,000 sqm floorspace much of which relates to office uses) currently marketed for a mixed use development opportunity, with particulars noting that over 12 months of marketing has been undertaken for continued employment use, proving unsuccessful. Furthermore, the attractiveness of Hertford and Ware as a location for residential development, alongside many employment sites sitting adjacent to residential uses, also places additional pressure on existing commercial stock in the local area owing to its compatibility with neighbouring uses.
- 8.2.3 The current housing trajectory suggests the potential for between 564 (approved) and 2,968⁷² (either allocated in the District Plan or with a resolution to grant planning permission, subject to a S106 agreement) new homes to be delivered in Hertford and Ware. With an average household size of 2.37 in East Herts⁷³, this indicatively suggests the potential for 1,337 – 7,034 additional residents, of which 654 – 3,440 would be expected to be aged 16 and over and economically active.
- 8.2.4 Given the potential scale of residential development in Hertford and Ware, it will be important to ensure this is balanced with an appropriate quantum of employment land to support opportunities for local residents. This is a particular consideration given the lack of spare capacity in the local industrial property market and the potential loss of office floorspace through the redevelopment of the former Hertfordshire County Council premises at Pegs Lane, which could act to reduce the currently elevated office vacancy rate to nearer the long-term average of 1-4% seen over the past 3 years. The analysis suggests that the development of Land at North and East of Ware, Mead Lane/Land East Of Marshgate Drive

⁷² It should be noted that 131 of these dwellings are at two sites in High Cross and therefore in a more rural setting than the built up areas of Hertford and Ware

⁷³ ONS (2022) Census (2021) Household size, local authorities in England and Wales,

and Hertford Logistics Hub could result in the generation of between 413 and 651 FTE jobs across the employment land use classes. This would represent growth of 1.4-2.5% on current workplace employment in Hertford and Ware. However, there is ongoing uncertainty regarding the amount of E(g) class floorspace to be developed at Land at North and East of Ware, with the application to be revised and subject to determination, and the outline permission pertaining to the development of the 2,220 square metres of B1c – now E(g)(iii) floorspace at Mead Lane//Land East Of Marshgate Drive (3/18/2465/OUT) has now lapsed. The amount of employment generated at the HERT2 allocated site could therefore differ markedly from that estimated.

- 8.2.5 The specialist nature of many jobs means that it is worth people travelling some distance to work, since by so doing they can secure a much better paid job, than they could if they worked locally. People are willing to commute, both because the salary they can command in a job more than outweighs the cost of commuting, and because they have reasons why they wish to live where they are, be that family connections, children in local schools, a preference to live in a market town rather than a bigger settlement. This is reflected more generally in East Herts, whereby the median earnings of people who work in the district are nearly 20% lower than of those who live in the district⁷⁴.
- 8.2.6 As set out in Section 4.5, commuter inflows and outflows are broadly balanced in Hertford and Ware. While there is no certainty that an increase in the number of jobs located in Hertford and Ware will materially impact commuter flows, there is a need to ensure the provision of employment space keeps up with growth in the working age population in Hertford and Ware, suggesting the need to increase the number of jobs available to residents in Hertford and Ware and safeguard against the potential future loss of employment land.
- 8.2.7 Furthermore, conversations with agents undertaken as part of this study highlighted that much of demand for new employment space in Hertford and Ware is to accommodate home grown occupiers. Agents noted a lack of fit for purpose stock to accommodate these companies' requirements within the local industrial market in particular. Future population growth has the potential to further increase demand for employment space in an already supply constrained market, exacerbating the issues experienced by local companies looking to secure premises and grow within Hertford and Ware.

8.3 What sort of jobs could be attracted or developed in Hertford and Ware?

Office

- 8.3.1 Hertford and Ware represents a significant share of the East Herts office market, accounting for 48.0% of office properties and 53.6% of the floorspace.
- 8.3.2 The analysis has demonstrated that vacancy rates are currently elevated, standing at 20.8% and suggesting a significant amount of spare capacity in the market. However, this is heavily skewed by the former Hertfordshire County Council premises at Pegs Lane (10.35ha, providing 21,000 sqm floorspace much of which relates to office uses) currently standing vacant. Prior to this, office vacancy rates had displayed a relatively steady trend from 2014 Q1 to 2025 Q2, averaging 2.1% over this period – below the generally accepted “frictional” vacancy rate of between 5-8% which indicates a market in balance. With Pegs Lane being marketed for a mixed use development opportunity – and particulars noting that over 12 months of marketing has been undertaken for continued employment use, proving unsuccessful – there is the potential for vacancy to fall back towards its long term trend if the site accommodates other uses, and Hertford and Ware to have a less prominent role in delivering office stock.
- 8.3.3 Despite a minor uptick in more recent quarters, office rental values in Hertford and Ware have seen limited growth since 2017 and fall well below regional and national averages. Agents reflected a similar picture to other towns in East Herts whereby the delivery of new

⁷⁴ ONS Annual Survey of Hours and Earnings 2025 – Resident and Workplace Analysis (Annual Pay – Gross)

office floorspace in Hertford and Ware is subject to viability challenges. It was viewed that the market would be unlikely to speculatively develop new office floorspace, given the achievable returns and muted demand profile following the Covid-19 pandemic. Moreover, agents noted that vacancy levels may have been kept down through conversions of office space to residential and other uses, and space not being actively marketed despite sitting empty.

- 8.3.4 This presents a slight challenge given the profile of office stock in Hertford and Ware. As set out in Section 5.4, while many office properties in the town are in use, they are generally aged, lower quality converted stock rather than modern, purpose-built stock that is generally demanded by occupiers, while agents noted the presence of some aged office stock within industrial estates that were not fit for purpose. Furthermore, the age and quality profile stands to necessitate investment to upgrade/retrofit existing buildings to comply with minimum energy efficiency standards set to be implemented in the future. Should landlords feel disinclined to invest to upgrade office stock, given the demand and rental performance of the local office market over recent years, Hertford and Ware could face a situation where it has offices which are 'stranded assets' that are both non-compliant and undesirable to retrofit. Moreover, this could add to existing pressures from other uses such as residential which could be sought to be accommodated through changes of use. However, given the supply of office space in Hertford and Ware is predominantly small and in converted buildings, it would be anticipated that some properties could be retrofitted relatively easily or repurposed for other uses, whilst some purpose built office space may be owner-occupied which does not need to comply with the regulations; all of which is likely to reduce the risk of stranded assets.
- 8.3.5 While Hertford and Ware does accommodate some larger office occupiers, such as EHDC in Hertford and GSK's R&D functions in Ware, agents noted that demand would be likely to align with the overall structure of the economy and focus on small "home grown" professional firms, with larger occupiers likely to be drawn to larger centres with relatively better connectivity and amenities.
- 8.3.6 Overall, it was viewed that given the lack of activity and churn in the market, future office development would likely be of a relatively limited scale, predominantly through infill development, the refurbishment of existing stock or to accommodate emerging typologies such as co-working spaces, as noted in Section 5.4. In line with the skills profile and sectoral breakdown of employment it would be anticipated that jobs would continue to be generated by prominent knowledge-intensive sectors such as professional, scientific and technical, while business administration and support functions are also prominent in the towns.

Industrial

- 8.3.7 The vacancy rate for light and general industrial uses, at 1.5%, indicates a particular lack of spare capacity in the local market. Warehousing and storage vacancy was more in line with the frictional level, at 7.4%, however this could reflect the available space that has come forward at the Hertford Logistics Hub and is yet to be occupied, with strong take-up to date noted by local agents.
- 8.3.8 Agent feedback indicates that demand for industrial space is robust in Hertford and Ware, with a lack of spare capacity and take-up viewed to be positive at more recent developments such as Hertford Logistics Hub and in neighbouring locations outside of the district, such as developments in Hoddesdon. The suitability of some industrial estates was questioned, with locations tucked within/behind residential areas, with poor access and limiting the potential for industrial uses to be appropriately accommodated without negative effects on neighbours, which was viewed to have contributed to the loss of industrial floorspace over time. However, it should be noted that existing sites are generally well occupied and meeting the needs of local companies.
- 8.3.9 The aforementioned lack of spare capacity in the market was viewed to have inflated rental values which, as shown in Table 5-8, are well above the regional and national average, particularly in the case of warehousing and storage space. This was viewed to be pricing out the more traditional occupiers in foundational sectors which are vital to support the overall function of the local economy. Additional supply was noted as offering the potential to free

up secondary space to support more cost-sensitive foundational uses and allowing other companies more fit-for-purpose space to support current operations and growth potential.

- 8.3.10 Overall, it was viewed that Hertford and Ware had the potential to support the development of additional industrial development, with one agent noting the potential for up to 1.5 million sqft of floorspace, with flexibility across E(g)(iii)/B2/B8 use classes and offering a variety of unit sizes to accommodate a range of businesses. Agents reflected the flexibility of new industrial units, which can be configured with mezzanine floors and often provide 5-15% ancillary office space within a unit.
- 8.3.11 Locations close to the A10 were viewed as being best placed to support this demand, owing to the north-south connectivity to the M25, while proximity to the A414 was also viewed favourably (if to a lesser extent than the A10). Suitable access and segregation from sensitive uses (e.g. residential) were also viewed as non-negotiables given the broader profile of supply in Hertford and Ware.
- 8.3.12 Sectors such as manufacturing and the life sciences were viewed to offer potential, given the current sectoral make-up of the local economy and presence of a prominent anchor in GSK. Foundational sectors such as construction trades, food and transportation and storage are also prominent locally. Agents reflected that recent developments such as Hertford Logistics Hub have accommodated a range of higher value occupiers not traditionally associated with B8 uses (e.g. a data centre fit-out company, events company; leisure based uses). This was viewed to reflect the distance from the Strategic Road Network, which raises transport costs for traditional B8 occupiers.

8.4 What actions need to be taken to achieve the desired outcomes?

- 8.4.1 This Study has identified that employment land in Hertford and Ware is under notable pressure, owing to the profile of the towns' sites and premises which are often neighbouring or in close proximity to residential uses, and the strong demand for residential development. This has resulted in the erosion of some employment sites over time – reflected in a loss of employment floorspace in Hertford and Ware over the past decade across all employment use classes – with agents noting a loss of space at Mead Lane, Hertford and Crane Mead in Ware in particular. Likewise, East Herts Council's Employment Land Review (2026) identifies losses at Crane Mead and Marsh Lane in Ware, and Mead Lane and Warehams Lane in Hertford.
- 8.4.2 Given this context, the Council should safeguard existing sites set out in Section 6 where possible, thereby maximising their contribution to local economic development. Whereupon existing employment land is lost to residential or other uses, or permissions including employment space do not come forward, or are developed in whole or in part for different uses than have currently been consented, this land or floorspace should be re-provided to a similar or improved quantity and quality specification.
- 8.4.3 A notable exception could be at Pegs Lane, where the former Hertfordshire County Council premises is currently marketed. It is recognised that available information reflects a lack of interest for continued employment use, consistent with the findings of this study in relation to the office market, with demand muted and predominantly focused on smaller occupiers, while the nature of the stock available – being aged stock in the original building, which was constructed in 1939, and the adjoining 1970s extension – would likely be unattractive to occupiers. Moreover, the site is not viewed to offer significant potential as an industrial location owing to the presence of neighbouring sensitive uses and access considerations. However, the loss of the office floorspace at Pegs Lane could result in a return to the trend vacancy rate below generally accepted "frictional" vacancy rate, indicating a lack of spare capacity in the market. However, overall, given the lack of activity and churn in the market, future office development would likely be relatively limited and of a smaller scale.
- 8.4.4 It is recommended that the Council continues to regularly monitor changes to existing and newly delivered employment space to identify evolving occupier/developer patterns and inform any policy responses that will be required.

- 8.4.5 As noted in Section 6, there is evidence of some sites, or areas within sites, offering the potential for redevelopment or refurbishment. There may be the opportunity for the Council to support opportunities for the intensification of these sites, given challenges associated with the availability of land/green belt constraints and conflicts with other uses in some locations. This has been seen in the experience of the Hertford Logistics Hub, with a net increase in floorspace delivered through the redevelopment of the site. However, this will need to be considered in relation to the site-specific characteristics, and the feasibility/compatibility with neighbouring uses.
- 8.4.6 Overall, demand was found to be robust for industrial uses and, on balance, the analysis and engagement with agents has highlighted a need for additional capacity to be delivered in Hertford and Ware. Additional employment land is recommended in order accommodate a range of potential occupiers and provide flexibility across E(g)(iii)/B2/B8 use classes, and to address affordability constraints, with proximity to the A10 likely to appeal to the market. However, potential needs for additional capacity should be considered alongside development opportunity given Green Belt and other constraints.
- 8.4.7 The Council should review the opportunities to work with landlords and occupiers to improve office properties in Hertford and Ware town centres to reduce the potential risk of some properties becoming non-compliant with minimum energy efficiency standards. Otherwise, there is a risk that some offices will become non-compliant and undesirable to retrofit, though, as previously noted, this risk is tempered somewhat due to some owner-occupancy and potential for retrofit/repurpose in the converted premises. 90% of office floorspace falls within the scope of tightening regulations to 2030, highlighting this as having a notable potential impact in Hertford and Ware. Potential opportunities could include the Council acting on its own stock and utilising local connections with landlords and occupiers. It is recognised that the Council faces funding constraints that can limit its resource and capacity to lead, however, there are several different roles Councils can play, including:
- Facilitation – acting as convenor to bring a ‘coalition’ of willing individuals and groups together;
 - Marketing and communication – a key, relatively resource-light role, providing trusted information to landlords and occupiers;
 - Coordination – acting as the ‘lynchpin’ in terms of coordinating action
 - Being a trusted partner – local authorities are often more trusted than national government and other stakeholders;
 - Supporting the growth of local skills and supply chain – working with the supply chain to promote accreditation and capacity-building; and
 - Partnering with the private sector – to facilitate retrofit finance to all occupiers, regardless of tenure⁷⁵.
- 8.4.8 It is important to recognise that this Study is part of a wider evidence base for the emerging Local Plan, and the strategy for supporting employment in Hertford and Ware will be informed by wider employment market and land supply assessments at the East Herts level, which will determine the overall quantity of employment land that is required over the District Plan period, alongside consideration of housing, infrastructure and environmental needs and constraints in the town and wider district. Should this wider evidence base support the need for additional employment land at the district level, the evidence presented suggests the potential requirement for additional employment land in Hertford and Ware to meet demand and align with growth in the residential population of the town. In considering additional employment land, or whether the existing supply of employment land is fit for purpose, a number of criteria should be considered. These include:
- Accessibility and sustainable transport needs;

⁷⁵ Ashden, (2021): Local authorities can drive a home retrofit revolution. Accessed here: <https://ashden.org/news/local-authorities-can-drive-a-home-retrofit-revolution/>. The bullets set out in the provided link were targeted more towards residential retrofitting, so the principles deemed relevant have been adapted to apply more broadly to how the Council can interact and collaborate with partners to retrofit commercial premises.

- The provision of essential infrastructure e.g. access to utilities;
- Segregation from sensitive neighbouring uses (e.g. residential); and
- Site size, access, shape and topography.
- Deliverability and/or ownership.

8.4.9 The Conclusions and Recommendations of this Study are summarised in Table 8-1 below.

Table 8-1 Conclusions and Recommendations

Topic	Conclusion/Recommendation
Is it desirable to increase the number of jobs in Hertford and Ware?	<ul style="list-style-type: none"> • The analysis has highlighted the challenge associated with the loss of employment land to residential uses in Hertford and Ware, and the potential for future population growth suggests the need to deliver jobs in order to support sustainable development. • Demand was found to be robust across the industrial use classes, and a lack of spare capacity and challenges in relation to choice and affordability suggest the need for additional employment land to address supply constraints and to retain/attract businesses in both high value and foundational sectors. • Demand is limited for office space; however, there is uncertainty as to whether the vacant floorspace at Pegs Lane will be retained and the age and quality profile of stock presents potential future challenges in retaining occupants and safeguarding stock given future minimum energy efficiency standards. Overall, it was viewed by agents that given the lack of activity and churn in the market, future office development would likely be relatively limited, predominantly through infill development or the refurbishment of existing stock (with minimum energy efficiency standards a potential driver of this).
What sort of jobs could be attracted or developed in Hertford and Ware? Why?	<ul style="list-style-type: none"> • Sectors such as manufacturing and the life sciences were viewed to offer potential, given the current skills profile, sectoral make-up of the local economy, presence of a strong anchor in GSK and future growth plans associated with the development of the Riverlabs campus. Foundational sectors such as construction trades, food and transportation and storage are also prominent in Hertford and Ware and would be expected to remain key industrial employers in the local area. • Office uses such as business administration and support services and professional, technical and scientific are expected to remain active in the local economy. Agents reflected that office space is predominantly focused on local professional companies, such as accountants and small legal firms, with limited churn in the market as companies remain in their premises over a long period. Accordingly, demand conditions for additional office development are muted. • Conditions to harness opportunities related to AI and data centre development could be realised if appropriate sites exist.
What actions need to be taken to achieve the desired outcomes?	<ul style="list-style-type: none"> • There is a need to provide choice in order to accommodate a range of potential occupiers across light industrial (E(g)(iii)), general industrial (B2) and warehousing and storage (B8) uses. • Delivery of small and medium-sized premises (under 2,000 sqm) should be encouraged reflecting the current mix of provision in the town (and generally the District). Foundational sectors were viewed to be at risk given affordability constraints for smaller industrial units, with additional supply offering the potential to free up secondary space to support more cost-sensitive foundational uses. • The Council should safeguard existing sites where possible. • The Council should continue to work proactively with the applicants at Land at North and East of Ware and Mead Lane / Land East Of Marshgate Drive to encourage the delivery of employment floorspace on the site. • The Council should consider the potential for the allocation of additional employment land for industrial and warehousing uses in Hertford and Ware to accommodate identified demand from such occupiers. In considering additional employment land, a number of criteria should be considered, in particular the proximity to, or suitable segregation from,

Topic**Conclusion/Recommendation**

residential uses (given the erosion of some sites next to such uses over time and the potential for some industrial uses to generate significant noise and vehicular movements), and access to the road network (in particular the A10). Further criteria are set out in Section 8.4.8.

- The Council should consider the role of more innovative office supply options should applications arise, for instance the co-location of office space alongside other more novel uses and co-working spaces.
- The Council should continue to regularly monitor changes to existing and newly delivered employment space to identify evolving occupier/developer patterns and inform any policy responses that will be required. This is important given that some newly delivered employment space may come forward within the E Use class and aforementioned pressure from residential uses.
- The Council should review the opportunities to work with landlords and occupiers to improve the energy efficiency of office properties in Hertford and Ware town centres before they become non-compliant with minimum energy efficiency standards, with an estimated 90% of floorspace potentially falling within the scope of tightening regulations by 2030.
- Should existing employment land be lost to other uses, or permissions including employment space do not come forward, or are developed for different uses than have been consented, this land or floorspace should be re-provided to a similar or improved quantity and quality specification. An exception could be the Pegs Lane site, whereby the reprovision of a similar quantum of office space would not align with demand conditions without the presence of a large anchor occupier.