

Sawbridgeworth Employment Study

East Hertfordshire District Council

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1. Executive Summary

1.1 Study context

- 1.1.1 AECOM was commissioned by East Herts District Council to deliver an Employment Study for Sawbridgeworth. The Employment Study forms part of the evidence base to underpin the review of the new East Herts Local 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 Sawbridgeworth.
- 1.2.2 At the local level, the District Plan identifies Sawbridgeworth as a small market town with a Minor Town Centre. Sawbridgeworth is the only town in the District without any designated Employment Areas, reflecting its position between Bishop's Stortford to the north and Harlow to the south-west which are considered to be more attractive employment locations. The District Plan seeks to maintain Sawbridgeworth's existing employment order to support local commercial, retailing and service businesses. As set out in Policy SAWB1, 'Development in Sawbridgeworth' designates land for residential development, with new retail and employment development "*directed to the town centre to maintain the vitality and viability of the town*".

1.3 Socio-economic profile

- 1.3.1 Sawbridgeworth has a lower economic activity rate than East Herts, but greater than the East of England and England. Similarly, a greater proportion of the population in Sawbridgeworth is educated to degree-level or equivalent compared to the East of England and England as a whole, but lower than in East Herts.
- 1.3.2 Sawbridgeworth has a distinct workplace employment profile. It registers sizable employment in the health sector (22.4%), linked to the presence of the Rivers Hospital in the town. In relation to the sectors driving office-based employment, the proportion of professional, scientific & technical services industry employment is broadly in line with the comparator geographies, however employment in the business administration & support services industry is significantly smaller. In terms of the sectors driving industrial employment, construction accounts for a higher share of employment compared to all comparator geographies, while manufacturing represents a greater share than in East Herts, but remains below regional and national levels.
- 1.3.3 Since 2015, Sawbridgeworth has seen most notable employment growth in the education sector, with other increases in employment registered in construction, property, accommodation & food services, wholesale, and mining, quarrying & utilities sectors. Conversely, there has been a fall in employment in health, retail, information & communication, business administration & support services, and manufacturing sectors.
- 1.3.4 The majority of businesses in Sawbridgeworth are classed as micro (0-9 employees). This is higher than the rates in East Herts, East of England, and England. Sawbridgeworth has a lower proportion of small and medium-sized businesses than the comparator areas, and has no large businesses.

- 1.3.5 Outward commuter movements from Sawbridgeworth exceed inward commuter movement by 1,937. The key destinations for workers include Harlow, other areas in East Herts and Uttlesford.
- 1.3.6 Population growth was lower in Sawbridgeworth between 2015 and 2024 than in East Herts and the East of England, but higher than in England. Population projections are not available at the Sawbridgeworth level. However, the current housing trajectory, detailing the known commitments, suggests the potential for a further 184 new homes to be delivered in Sawbridgeworth, as part of the District Plan allocation (SAWB4). With an average household size of 2.37 in East Herts, this indicatively suggests the potential for 426 additional residents, of which 270 would be expected to be aged 16 and over and economically active.

1.4 Property market assessment

Office Market

- 1.4.1 There are 23 office properties in Sawbridgeworth, comprising 5,278 sqm of floorspace. Sawbridgeworth represents a small share of the East Herts office market, accounting for 5.8% of office properties.
- 1.4.2 Sawbridgeworth's office market is dominated by smaller units, and the office stock in Sawbridgeworth is relatively old, with the greatest proportion of development between 1960 and 1969, at 21.7%, significantly greater than in East Herts, the East of England, and national averages. Modern office development (2000-present) is limited, accounting for 8.7% of stock, above the East Herts, but below regional and national averages.
- 1.4.3 Vacancy levels have fluctuated over time, mirroring wider economic and structural changes in office demand, however vacancy rates currently stand at 11.4%, indicating some spare capacity.
- 1.4.4 Sawbridgeworth attracts higher market rental values for office use classes than the East Herts average, but lower rental values compared to 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.

Industrial and Warehousing and Storage Market

- 1.4.5 The industrial and warehousing and storage market in Sawbridgeworth is very small, comprising 6 properties providing 19,015 sqm of floorspace. The vacancy rate for industrial and warehousing and storage floorspace in Sawbridgeworth is above the East Herts, East of England, and England average. However, given the small market size, vacancy rates are subject to volatility.
- 1.4.6 Sawbridgeworth attracts higher market rental values for industrial property types than the East of England and England, however the highest industrial market rents are found in East Herts.
- 1.4.7 Between 2014 and 2025, market rental values exhibited an overall increase, with the greatest increase in market rental values observed in Sawbridgeworth compared to all other comparator areas.

Influences on Demand

- 1.4.8 There are a number of external factors which could influence the demand for employment floorspace in Sawbridgeworth over the coming years. These include the Harlow and Gilston Garden Town (HGGT) which represents a significant concentration of housing and employment growth in close proximity to the town, with the Gilston development located just outside the study area (defined in Section 4.1). The scale of employment provision planned within the HGGT, including modern industrial, warehousing and logistics, office, and small and medium-sized enterprise (SME) space, will create job opportunities that are likely to be accessible to Sawbridgeworth residents. As a result, future employment needs arising from

Sawbridgeworth's resident workforce may, to some extent, be met within the HGGT, rather than through the expansion of employment land within Sawbridgeworth itself. However, it also highlights the importance of ensuring that Sawbridgeworth can continue to accommodate a level of local employment floorspace that supports town-centre vitality and sectors less well served by these strategic locations.

- 1.4.9 Other considerations include the proposed introduction of minimum energy efficiency standards which, while providing a strong incentive for the modernisation and upgrading of privately let business floorspace, could also present challenges for office stock in Sawbridgeworth, which includes a relatively high proportion of older buildings and conversions rather than purpose-built office space. However, it should be noted that a limited number of EPC certificates potentially fall within the scope of tightening regulations by 2030. Similarly, the evolution of changing space requirements for office and knowledge work following the Covid-19 pandemic has, and will continue to, influence the demand for employment floorspace in Sawbridgeworth.

1.5 Existing Employment Clusters

- 1.5.1 There are no allocated employment sites within Sawbridgeworth in the East Herts District Plan; however, a number of existing employment clusters have been identified in Sawbridgeworth based on CoStar data. These sites include The Maltings (which is within urban area but within Epping Forest District), and Riverside Business Park, and Clarklands Industrial Estate, which are both located outside the town. Collectively, these locations provide a varied and flexible stock of employment floorspace, characterised by smaller, older sites of generally low to medium quality, with consistently low vacancy rates.
- 1.5.2 In addition, Sawbridgeworth town centre plays a role in providing office space locally, linked to its strong connectivity and local amenities. The town centre comprises 10 office properties, providing access to a range of office spaces ranging from 52 sqm to 214 sqm.

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 Sawbridgeworth?	- The analysis has highlighted the growth context in Sawbridgeworth is relatively modest. Population growth between 2015 and 2024 was limited (696 additional residents), while the total number of economically active residents fell between 2011 and 2021. The current housing trajectory, taking account of the District Plan allocation (SAWB4) with planning permission, suggests the potential for 184 new homes to be delivered in Sawbridgeworth. With an average household size of 2.37 in East Herts¹, this indicatively suggests the potential for 436 additional residents, of which 270 would be expected to be aged 16 and over and economically active. - Wider commercial development in competing locations may satisfy some demand from the resident population in Sawbridgeworth. Conversations with agents reflected views that employment demand was satisfied in larger centres nearby such as Bishop's Stortford and Harlow, while future proposals at HGGT could present accessible opportunities for Sawbridgeworth residents. - Additional employment development could increase pressure on the A1184, which already suffers from congestion which slows journey times, while the availability of suitable land to support employment development is limited. - On balance, muted demand, modest population growth and constraints facing the town (including its location within the Green Belt, the historic significance of the town centre and congestion on London Road), suggest that additional employment land would be more readily accommodated in larger centres within East Herts and HGGT.

¹ ONS (2022) Census (2021) Household size, local authorities in England and Wales,

Topic	Conclusion/Recommendation
	Supporting local employment opportunities remains desirable. Without sufficient local employment provision, there is a risk that Sawbridgeworth increasingly functions as a predominantly residential settlement with growing levels of outward commuting, placing additional pressure on transport networks and undermining wider sustainability objectives. However, this growth is likely to be met through infill development and the refurbishment /redevelopment of existing sites, rather than through additional employment land.
What sort of jobs could be attracted or developed in Sawbridgeworth? Why?	- Future demand in office related sectors would be expected to align with the current structure of the economy, focusing on microbusinesses and SMEs in local professional services such as lawyers, accountants, architects and financial advisors. - Future industrial growth, were it to be accommodated, would likely focus on prominent sectors such as construction and manufacturing, as set out in Section 4.3. - Conditions to harness opportunities related to AI and data centre development could be realised if appropriate sites exist, though the availability of sufficient land to accommodate occupiers whose requirements are typically for large sites, would suggest there is limited potential for this in Sawbridgeworth.
What actions need to be taken to achieve the desired outcomes?	- The Council should consider safeguarding existing sites set out in Section 6 where possible, thereby maximising their contribution to local economic development. - While limited demand for additional employment land to support office and industrial development was identified, the Council should look to ensure existing stock remains fit for purpose. There may be opportunities to support the refurbishment/renovation of sites or to accommodate infill development, given the age and quality profile of stock and sites identified in Sections 5 and 6 of this report. However, this will need to be considered in relation to the site-specific characteristics, and the feasibility/compatibility with neighbouring uses. - 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 Sawbridgeworth town centre, though noting a limited number of EPC certificates potentially fall 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.

2. Introduction

2.1 Study context

- 2.1.1 East Herts District Council commissioned AECOM to deliver an Employment Study for Sawbridgeworth.
- 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, the Sawbridgeworth Employment Study is required as part of this evidence base and to support with determining future planning applications.
- 2.1.3 Sawbridgeworth has experienced modest levels of development in recent years, reflecting its role as a small market town with strong functional links to surrounding employment centres, including Harlow, Bishop's Stortford, London, and Cambridge. Growth has been shaped by the need to preserve and enhance the town's character and is further constrained by the surrounding Green Belt, limiting opportunities for large-scale expansion. As a result, recent development has been predominantly residential in nature, while the town's limited employment provision has largely been retained to support local-scale economic activity².
- 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 Sawbridgeworth, 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 local property market agents;
 - A supply-side assessment of the town's current employment sites informed by desktop research.
 - Estimate future requirements –
 - Understand the likely future demand for employment space in the town, including through the agent conversations and discussions with council officers;
 - Conclusions and recommendations –
 - Set out evidence-based conclusions and recommendations for supporting employment in Sawbridgeworth.

² East Herts District Council (2018) East Herts District Plan. Available at: https://cdn-eastherts.onwebcurl.com/s3fs-public/documents/District_Plan_Publish_web_view.pdf [Accessed: 29/04/26].

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 Sawbridgeworth, compared against the local authority area and wider geographies.
- Section 5 outlines a review of activity in the commercial property market with specific consideration of the office stock in Sawbridgeworth town centre.
- Section 6 provides an overview of the existing employment sites in Sawbridgeworth.
- Section 7 brings together the findings of each task to provide recommendations and conclusions and outline an overall strategy for development of employment land in Sawbridgeworth.

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 Sawbridgeworth at the national, sub-regional (Hertfordshire), local authority (East Herts) and neighbourhood (Sawbridgeworth) level.

3.2 Background context

- 3.2.1 Sawbridgeworth is a historic market town of approximately 12,000 residents, located to the south of Bishop's Stortford and north-east of Harlow, to the east of the East Herts District. Despite Sawbridgeworth's strong links to these settlements, particularly in terms of employment opportunities, the town maintains a strong and distinct local identity.
- 3.2.2 The town performs an important local service and retail function, with the historic commercial core located on Bell Street. The town centre lies within a Conservation Area, with many buildings of historic significance dating from the Tudor, Stuart and Georgian periods. However, the constraints of the small medieval core limit the ability to accommodate larger suppliers. Sawbridgeworth is therefore designated a Minor Town Centre in the East Herts District Plan³.
- 3.2.3 The A1184 runs through the centre of Sawbridgeworth, providing links north to Bishop's Stortford, and south to Harlow. The town benefits from strong transport connectivity, with the M11 located less than 2 km to the east. Sawbridgeworth railway station, on the West Anglian Main Line, provides services to London Liverpool Street, Stratford, Bishop's Stortford, and Cambridge, supporting its role as a commuter settlement within the wider London-Cambridge corridor. The A1184 also connects to the A120 which provides links to the A10 to the west and Stansted Airport to the east. Sawbridgeworth is serviced by 3 bus links around the town, with connections to surrounding settlements including Bishop's Stortford, Harlow, and Stansted Airport. As a result, employment opportunities for residents of Sawbridgeworth are primarily located in Harlow, other areas of East Hertfordshire, and Uttlesford, with approximately 10.5% of residents working and living in Sawbridgeworth.
- 3.2.4 Sawbridgeworth is tightly constrained by the Metropolitan Green Belt, which has limited opportunities for outward expansion. Additional constraints, including a limited supply of brownfield land, river corridors, areas of flood risk and designated environmental assets, further influence the availability and distribution of employment land.
- 3.2.5 As noted in the Sawbridgeworth Settlement Appraisal⁴, there is a clear relationship between Sawbridgeworth and Lower Sheering, which is located adjacent to the town, to the east of the River Stort, and within the administrative area of Epping Forest District Council. This relationship is reflected in this section, and in the study area set out in Section 4.1.

3.3 National planning policy and guidance

National Planning Policy Framework (2024)

- 3.3.1 The National Planning Policy Framework⁵ (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 East Herts Council (2018). East Herts District Plan 2018.

⁴ East Herts Council (2016) Sawbridgeworth Settlement Appraisal. Available at: <https://www.eastherts.gov.uk/planning-building/east-herts-district-plan/evidence-library/settlement-and-site-specific-studies-sss> [Accessed: 14/05/26].

⁵ Ministry of Housing, Communities & Local Government (2024) National Planning Policy Framework

- 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 has recently consulted on an updated draft of the NPPF, published in December 2025⁶. 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 NPPF⁷. 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.

Planning Practice Guidance (2019)

- 3.3.8 Planning Practice Guidance (PPG)⁸ 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 Sawbridgeworth.
- 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,

⁶ 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].

⁷ 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].

⁸ Ministry of Housing, Communities and Local Government (2019). Planning Practice Guidance

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 2025⁹, 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 Sawbridgeworth. The town's employment profile is characterised by strong representation in health, education, and construction, with notable presence also in manufacturing and professional and business sectors. However, Sawbridgeworth could benefit from the national focus on these sectors driving economic resilience and innovation. With the UK's shift toward Net Zero and digital transformation, aligning local policies with national priorities can attract investment and support high-value job creation. Strengthening infrastructure, workforce development, and industry partnerships will position the region as a competitive hub for growth. Notably, Sawbridgeworth lies within the UK Innovation Corridor Core Area, which prioritises Life Sciences alongside Advanced Engineering and Manufacturing¹⁰.

3.4 Local planning policy and guidance

East Herts District Plan (2018)

- 3.4.1 The East Herts District Plan (adopted in 2018)¹¹ 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.
- 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 Sawbridgeworth and employment land within Sawbridgeworth include:

⁹ 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].

¹⁰ Hertfordshire Futures (2025) Hertfordshire Local Enterprise Partnership Building Our Industrial Strategy: Our response. Available at: <https://www.hertfordshirefutures.co.uk/media/nvxctfww/hertfordshire-lep-is-report-interactive.pdf> [Accessed: 11/02/26].

¹¹ East Herts Council (2018). East Herts District Plan 2018.

- 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 8 of the East Herts District Plan focuses specifically on Sawbridgeworth and sets out the development strategy for the town. Sawbridgeworth is identified as a Minor Town Centre located in close proximity to Bishop’s Stortford and Harlow. There are no policies that designate employment areas within the town, however Policy SAWB1 ‘Development in Sawbridgeworth’ outlines that *“new retail and employment development will be directed to the town centre to maintain the vitality and viability of the town”*. Policy SAWB1 also sets out that Sawbridgeworth will accommodate at least 500 homes to the north and west of the town, with sites allocated in Policy SAWB2, Policy SAWB3 and Policy SAWB4.
- 3.4.5 Policy DPS1 Housing, Employment and Retail Growth 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 B1/B2/B8 uses, an additional 7,100 sqm of convenience floorspace, and 5,700 sqm of comparison retail floorspace.
- 3.4.6 Other policies in the East Herts District Plan of relevance to Sawbridgeworth 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 Hertford & Ware, 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.
- 3.4.7 East Hertfordshire District Council, alongside Harlow Council and Epping Forest District Council, are working in partnership with Hertfordshire County Council, Essex County Council, landowners and site promoters to deliver the Harlow and Gilston Garden Town (HGGT). The HGGT initiative seeks to accommodate planned growth and respond to increasing housing and infrastructure needs, whilst supporting the economic ambitions of the town of Harlow and the wider UK Innovation Corridor.
- 3.4.8 The Gilston Area, comprising of seven villages, is the area of the HGGT located within East Herts District, to the south west of Sawbridgeworth. The development is expected to deliver a range of supporting uses alongside residential growth, including the provision of local employment opportunities such as small-scale office space.
- 3.4.9 Policy GA1 ‘The Gilston Area’ allocates land to accommodate approximately 10,000 homes, of which at least 3,000 are to be delivered by 2033. Development is to be guided by Garden City principles, including the provision of “a wide range of local jobs within easy commuting distance of homes”. The policy also provides for the delivery of employment land (approximately 5 ha) in accessible locations to support sustainable development patterns. In addition, it emphasises the importance of supporting local supply chains and enhancing access to employment and training opportunities, including apprenticeships, to strengthen the local skills base.

New Local Plan

- 3.4.10 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 Sawbridgeworth, to consider changes in the local context and provide robust evidence that can inform the emerging Local Plan.

Epping Forest District Local Plan 2011-2033 (2023)

- 3.4.11 The Epping Forest District Local Plan 2011-2033 (adopted in 2023)¹² establishes how development will be planned and delivered across Epping Forest 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.
- 3.4.12 The Epping Forest District Local Plan highlights objectives to form the basis of the policies, relating to environment and design, housing, economic development, infrastructure and movement, and air quality, climate change and flood risk.
- 3.4.13 Objectives relevant to Sawbridgeworth and employment land within Sawbridgeworth include:
- Objective C Economic Development:
 - (i) *'To make provision for the objectively assessed economic and town centre needs in the District to the extent that this is compatible with national planning policy'*; and
 - (iii) *'To encourage the growth of local businesses and start-ups, through supporting home-working, provision of a range of flexible and affordable business facilities and the provision of high-speed broadband across the District'*.
- 3.4.14 There is a clear relationship between Sawbridgeworth and Lower Sheering, which is located adjacent to the town, and falls within the administrative area of Epping Forest District Council. This relationship is reflected in the definition of Sawbridgeworth taken forward in this Study, as defined in Section 4.1 of this report. Lower Sheering is designated as a small village within the Epping Forest District Local Plan and is encompassed within a Conservation Area. Policy P12 'Coopersale, Fyfield, High Ongar, Lower Sheering, Sheering and Stapleford Abbots' identifies residential and employment development sites within Lower Sheering, including:
- LSHR.R1 Land at Lower Sheering – approximately 14 homes; and
 - LSHR.E1 – Land at The Maltings, Lower Sheering – approximately 2.04 ha employment land (existing site).
- 3.4.15 Other policies in the Epping Forest District Plan of relevance to Sawbridgeworth and employment land include:
- Policy SP1 Spatial Development Strategy 2011-2033 – Sets out the overarching strategy to deliver sustainable development and job growth across the District; and
 - Policy E1 Employment Sites – Outlines that the Council will meet identified employment land needs through the site allocations and will encourage and support flexible employment space to meet the employment and economic needs of the District.
- 3.4.16 As outlined above, the HGGT extends into the administrative area of Epping Forest District Council, including the Latton Priory, Water Lane, and East of Harlow strategic sites, with the latter partly located within the Sawbridgeworth study area. Policy SP3 Development & Delivery of Garden Communities in the Harlow and Gilston Garden Town outlines that

¹² Epping Forest District Council (2023). Epping Forest District Local Plan 2011-2033. Available at: <https://www.eppingforestdc.gov.uk/planning-and-building/planning-policy/adopted-local-plan-march-2023/> [Accessed: 26/03/26].

development will be of sufficient scale to support a range of homes and employment, including the provision and promotion of appropriate opportunities for small-scale employment-generating uses. Policy SP4 Garden Communities allocates development, including a minimum of 750 homes in East of Harlow up to 2033 and the relocation of Princess Alexandra Hospital.

Sawbridgeworth Town Action Plan 2023-2027

- 3.4.17 The fourth Sawbridgeworth Town Action Plan¹³ covers the period from 2023 to 2027. It sets out a locally informed framework for enhancing the town's social, economic and environmental offer, based on community consultation undertaken between September and October 2023.
- 3.4.18 Of relevance to this Employment Study, survey responses identified 'local job opportunities' and 'variety of local businesses' as relatively weak aspects of the town. The Action Plan also identifies the performance of the town centre as a key issue, including a decline in independent businesses and a lack of diversity in commercial offer which may constrain local employment generation, particularly within retail, leisure and service sectors. The Action Plan also identifies concerns relating to housing delivery, including rapid growth and a lack of affordable homes.

Hertfordshire Economic Strategy

- 3.4.19 The Hertfordshire Economic Strategy 2026-2036¹⁴, 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.
- 3.4.20 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.
- 3.4.21 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)

- 3.4.22 The East Herts District Wide Employment Land Review (2026)¹⁵ 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. There are no allocated Employment Areas in Sawbridgeworth.

¹³ Sawbridgeworth Town Council (2023) Sawbridgeworth Town Action Plan 2023-2027. Available at: <https://www.sawbridgeworth-tc.gov.uk/town-action-plan/> [Accessed: 01/04/26].

¹⁴ Hertfordshire Futures (2026) Hertfordshire Economic Strategy 2026-2036. Available at:

<https://www.hertfordshirefutures.co.uk/media/bm1jncz4/hertfordshire-economic-strategy-2026-2036.pdf> [Accessed: 22/04/26].

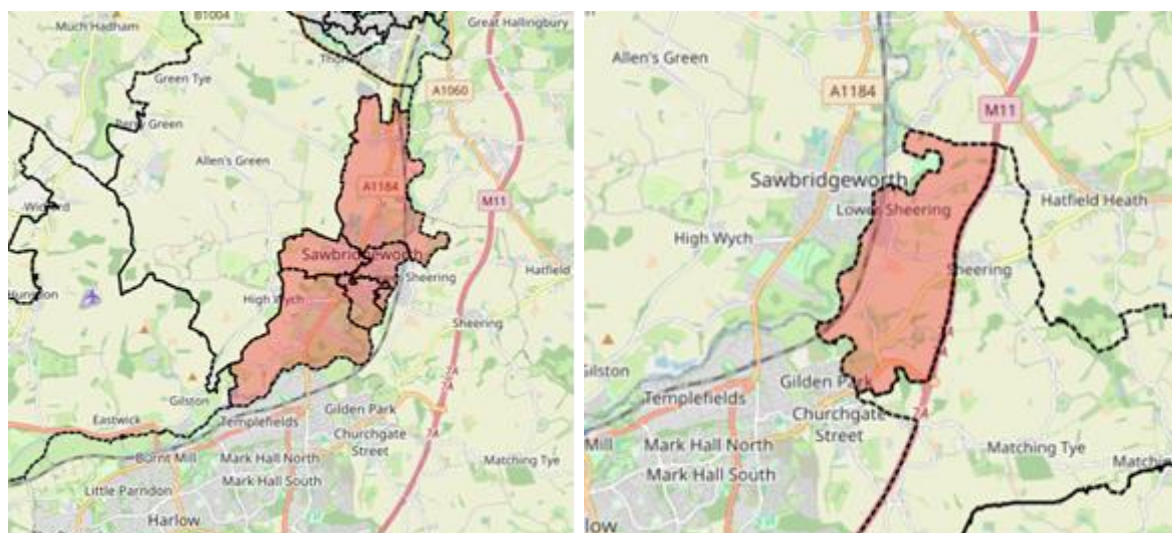
¹⁵ East Herts District Council (2026) East Herts District Wide Employment Land Review.

4. Socio-economic Profile

4.1 Introduction

- 4.1.1 This section of the report sets out an assessment of Sawbridgeworth's socio-economic profile in order to understand the impact of changes on likely employment space needs. Comparison is provided with East Herts district, the East of England region and England.
- 4.1.2 The geographical area of Sawbridgeworth has been defined by Office for National Statistics (ONS) Lower Super Output Areas¹⁶ and is set out in Figure 4-1. LSOAs are a statistical measure for small areas comprising between 400 and 1,200 households and have a usual resident population of between 1,000 and 3,000 persons.
- 4.1.3 As previously noted, there is a strong relationship between Sawbridgeworth and Lower Sheering, which is located adjacent to the town, to the east of the River Stort. Lower Sheering falls within the administrative area of Epping Forest District Council. This relationship is reflected in the study area – hereafter be referred to as 'Sawbridgeworth' – set out below.

Figure 4-1 Map of LSOAs to define 'Sawbridgeworth'



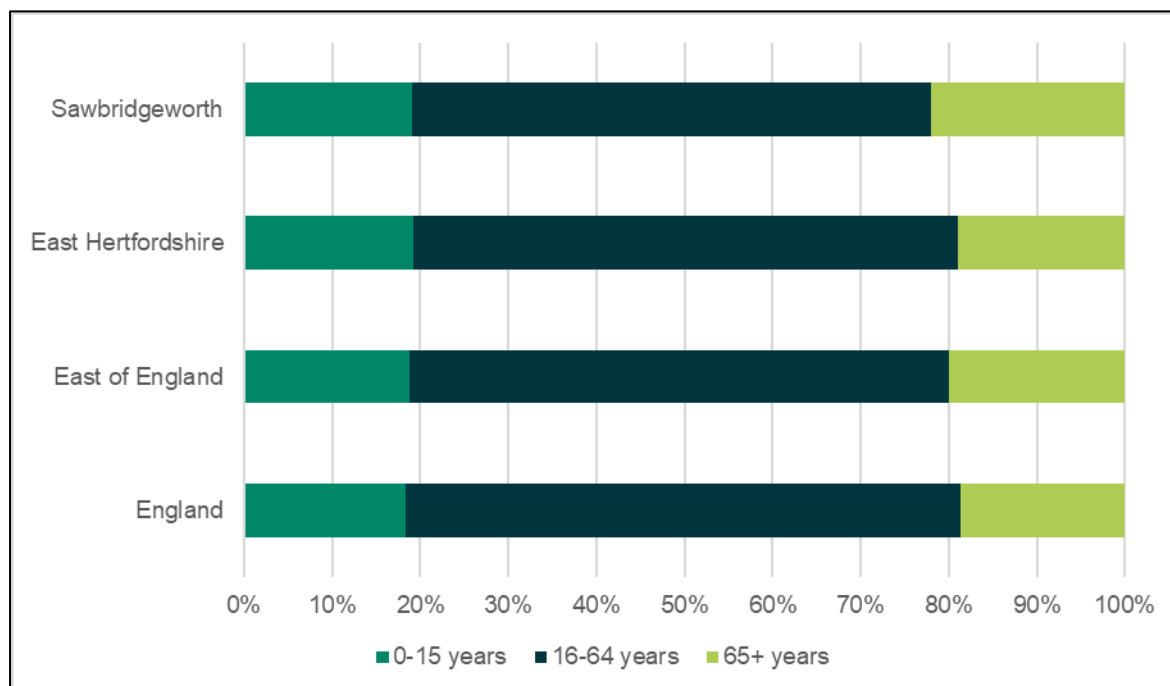
Source: NOMIS (2026).

4.2 Population, labour force and skills

- 4.2.1 ONS Population Estimates¹⁷ for 2024, the most recent year available, show that the resident population of Sawbridgeworth was 11,717 in 2024. The population has increased from 11,021 in 2015, representing an increase of 6.3%. The growth for the study area is lower than that recorded for East Herts (8.3%) and the East of England (6.7%), but greater than in England (6.0%) over the same time period.
- 4.2.2 Figure 4-2 shows the age breakdown of the population in Sawbridgeworth, and the comparator areas.

¹⁶ E01023499 : East Hertfordshire 011A, E01023500 : East Hertfordshire 011B, E01023501 : East Hertfordshire 011C, E01023502 : East Hertfordshire 011D, E01023503 : East Hertfordshire 011E, and E01021795 : Epping Forrest 001B.

¹⁷ ONS (2026) Population Estimates 2024.

Figure 4-2 Population breakdown by age (2024)

Source: ONS Population Estimates 2024.

- 4.2.3 Figure 4-2 outlines that in 2024, 59.0% of Sawbridgeworth residents were of working age (16 to 64 years), lower 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 Sawbridgeworth has decreased over the period from 2015 to 2024, from 62.1% to 59.0%. The working age population in East Herts, the East of England, and England also decreased from 2015 to 2024, by 1.1%, 0.5%, and 0.7% percentage points respectively, however Sawbridgeworth represents the greatest decrease, by 3.1%.
- 4.2.4 In 2024, older residents (aged 65 and over) comprised 22.0% of the population in Sawbridgeworth, indicating an older 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 Sawbridgeworth increased from 19.5% in 2015 to 22.0% in 2024, reflecting a percentage point increase of 2.5%. In contrast, there has been lower growth in this age group in East Herts with increases of 1.4% and 0.9% in both the East of England and England.
- 4.2.5 The proportion of the population aged 0 to 15 years old comprised 19.1% of the population in Sawbridgeworth, broadly in line with East Herts (18.9%), the East of England (20.0%), and England (18.7%). The proportion of the younger population in Sawbridgeworth increased from 18.5% in 2015 (an increase of 0.4%), while it declined in East Herts, the East of England, and England by 0.3%, 0.1%, and 0.5% respectively.
- 4.2.6 Population projections are not available at the Sawbridgeworth level. Current approved planning applications suggest the potential for 184 new homes associated with application 3/18/2735/FUL (District Plan allocation SAWB4). With an average household size of 2.37 in East Herts¹⁸, this indicatively suggests the potential for an additional 436 residents in Sawbridgeworth, of which 270 would be expected to be aged 16 and over and economically active.

¹⁸ ONS (2022) Census (2021) Household size, local authorities in England and Wales,

- 4.2.7 As shown in Table 4-1, the economic activity rate¹⁹ for residents aged 16 and over (excluding students²⁰) in 2021 was 63.4% in Sawbridgeworth. This is lower than East Herts (65.7%), but higher than the East of England (61.8%), and England (60.9%). The employment rate²¹ in Sawbridgeworth (60.9%) is lower than in East Herts (63.2%), in line with England (60.9%), and greater than the East of England (58.8%).
- 4.2.8 The unemployment rate in Sawbridgeworth was 2.6%, slightly higher than East Herts (2.5%), but lower than the East of England (3.0%) and England (3.5%).
- 4.2.9 Overall, Sawbridgeworth 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 (2021)

	Sawbridgeworth		East Herts (%)	East of England (%)	England (%)
	Number	%			
Economically active (ages 16+)	5,696	63.4	65.7	61.8	60.9
Employment rate (ages 16+)	5,465	60.9	63.2	58.8	57.4
Unemployment rate (ages 16+)	231	2.6	2.5	3.0	3.5
Economic inactivity	3,283	36.6	34.3	40.2	41.4

Source: ONS Census 2021.

- 4.2.10 Since the previous Census in 2011, the economic activity rate in Sawbridgeworth has fallen to 61.9% in 2021, from 75.1%. As shown in Table 4-2, this decline has been primarily driven by an increase in the retired population, growing by 107.7% in Sawbridgeworth. All comparator geographies registered a similar decline in economic activity levels between the two censuses.
- 4.2.11 The slight fall in the proportion of economically active residents between 2011 and 2021 saw a corresponding fall in the absolute number of economically active residents in Sawbridgeworth, by 146 people. Notably, the number of retired people in Sawbridgeworth increased by 1,168 people over the period, while an increase in the number of self-employed residents was observed, by 72 people.

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

Economic activity status	2011	2021	Change (2011 to 2021)
Total economically active	5,842	5,696	-146
Full time	3,409	3,277	-132
Part time	1,115	1,063	-52
Self employed	952	1,024	72
Unemployed	190	191	1
Students	176	141	-35
Total economically inactive	1,936	3,283	1,347

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).

Economic activity status	2011	2021	Change (2011 to 2021)
Retired	1,085	2,253	1,168
Student	257	307	50
Looking after family	278	356	78
Long-term sick or disabled	220	178	-42
Other	96	189	93

Source: ONS Census 2021 and Census 2011.

- 4.2.12 According to the 2021 Census, the latest available data at the LSOA level, 85.6% of residents aged 16 and over in Sawbridgeworth respectively held some form of qualification, above the rate in the East of England (81.9%), and England (81.9%), but below East Herts (86.2%). In addition, the proportion of the population holding a qualification in Sawbridgeworth has increased since 2011, from 82.3%, demonstrating that the population was more skilled in 2021.
- 4.2.13 Among residents of Sawbridgeworth, 35.1% held a degree level or equivalent qualification (National Vocational Qualification (NVQ) Level 4+), which is lower than in East Herts (38.6%), but 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 (2021)

	Sawbridgeworth (%)	East Herts (%)	East of England (%)	England (%)
% with NVQ4+	35.1	38.6	31.6	33.9
% with NVQ3+	16.8	16.8	16.8	16.9
% with NVQ2+	15.2	14.4	14.4	13.3
% with NVQ1+	10.7	9.4	10.8	9.7
% with other qualifications	2.4	7.0	8.3	8.1
% with no qualifications	14.4	13.8	18.1	18.1

Source: ONS Census 2021.

4.3 Local employment

- 4.3.1 Sawbridgeworth 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 relation to the sectors driving office-based employment, Sawbridgeworth shows a moderate representation of employment in the professional, scientific and technical and business administration and support services, accounting for 8.3% and 5.8% of employment respectively. In Sawbridgeworth, employment in the professional, scientific and technical sector is greater than recorded for the East of England (7.9%), but lower than the East Herts (10.8%) and England (9.4%) averages. However, in terms of business administration and support services, employment in Sawbridgeworth is notably lower than all comparator areas.
- 4.3.3 In relation to the sectors driving industrial employment, Sawbridgeworth shows a greater share of employment in manufacturing (7.1%) compared to East Herts (6.1%), but a lower share than the East of England (7.3%), and England (7.4%). The construction industry also comprises a large proportion of employment in Sawbridgeworth (10.2%), notably greater than East Herts (7.9%), the East of England (6.9%), and England (4.9%).
- 4.3.4 In Sawbridgeworth, employment in the health industry accounts for the largest share of jobs at 22.4%, higher than East Herts (15.8%), the East of England (10.8%), and England (9.1%). This is likely as a result of healthcare facilities in and around the area, including

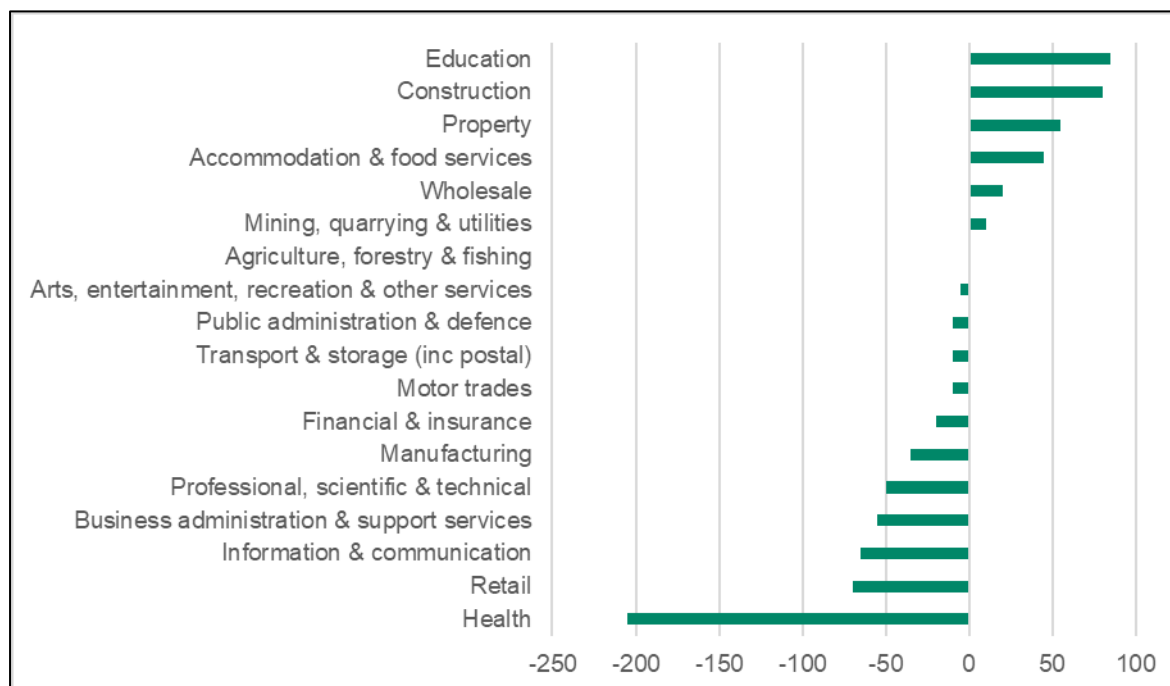
Rivers Hospital in Sawbridgeworth and nearby facilities such as Herts & Essex Community Hospital in Bishop's Stortford and Princess Alexandra Hospital in Harlow.

Table 4-4 Employment by industry (2024)

	Sawbridgeworth		East Herts	East of England	England
	Number	%	%	%	%
Agriculture, forestry & fishing	0	0.0	1.2	1.7	1.2
Mining, quarrying & utilities	10	0.3	0.9	1.0	1.1
Manufacturing	225	7.1	6.1	7.3	7.4
Construction	325	10.2	7.9	6.9	4.9
Motor trades	65	2.0	2.3	2.3	1.8
Wholesale	100	3.1	3.6	4.3	3.8
Retail	240	7.5	7.9	8.8	8.4
Transport & storage (including postal)	50	1.6	1.6	5.5	5.1
Accommodation & food services	245	7.7	8.6	7.9	7.9
Information & communication	80	2.5	3.4	3.5	4.7
Financial & insurance	30	0.9	1.4	2.0	3.3
Property	95	3.0	2.0	1.9	2.0
Professional, scientific & technical	265	8.3	10.8	7.9	9.4
Business administration & support services	185	5.8	15.8	10.8	9.1
Public administration & defence	10	0.3	2.2	3.4	4.2
Education	405	12.7	10.1	8.4	8.3
Health	715	22.4	9.4	12.1	12.9
Arts, entertainment, recreation & other services	145	4.5	4.7	4.0	4.4
Total	3,190				

Source: ONS BRES 2026.

- 4.3.5 Over the period 2015 to 2024, workplace employment in Sawbridgeworth stayed broadly unchanged, decreasing by 50 jobs. The greatest increase in employment occurred in the education industry over the period, registering an increase of 85 workers, likely a reflection of the increasing capacity of local schools to meet rising demand. This is reflected in the proportion of employment in the sector, which increased from 9.3% in 2015 to 12.7% in 2024. Other notable increases in employment have been registered in the construction, property, and accommodation & food services sectors in Sawbridgeworth.
- 4.3.6 Conversely, there has been a notable fall in employment in the health sector in Sawbridgeworth, from 920 to 715 workers. This is reflected in the proportion of employment in the sector, which fell from 26.8% in 2015 to 22.4% in 2024. Other sectors to register a decline in employment over the period include the professional, scientific & technical sector and manufacturing. This trend diverges from the regional and national picture, where health sector employment has grown, while the professional, scientific and technical sector has also seen significant expansion. However, the health sector would be unlikely to drive any significant demand for E(g) / B class employment space. Trends in manufacturing jobs, which do influence demand for employment space, are more mixed, with some regional growth but national decline. The changes in employment over this period in Sawbridgeworth are set out in Figure 4-3.

Figure 4-3 Change in employment in Sawbridgeworth 2015-2024

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

- 4.3.7 Employment by occupation in Sawbridgeworth is broadly comparable to East Herts, as shown in Table 4-5. In general, Sawbridgeworth 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.
- 4.3.8 The largest occupation category in Sawbridgeworth is professional occupations (22.2%), in line with East Herts (22.3%), but greater than the regional (19.6%) and national (20.3%) average. This is followed by managers, directors and senior officials, with the proportion in Sawbridgeworth (17.8%) being lower than East Herts (18.2%), but greater than the East of England (13.7%) and England (12.9%).
- 4.3.9 Conversely, Sawbridgeworth 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 6.1% and 6.8% respectively, lower than the East of England (9.9%) and England (10.5%).

Table 4-5 Occupation of residents aged 16 years + (2021)

	Sawbridgeworth (%)	East Herts (%)	East of England (%)	England (%)
Managers, directors and senior officials	17.8	18.2	13.7	12.9
Professional occupations	22.2	22.3	19.6	20.3
Associate professional and technical occupations	16.0	15.8	13.3	13.3
Administrative and secretarial occupations	11.7	10.1	9.8	9.3
Skilled trades occupations	9.1	9.3	10.7	10.2
Caring, leisure and other service occupations	7.3	7.7	9.1	9.3

	Sawbridgeworth (%)	East Herts (%)	East of England (%)	England (%)
Sales and customer service occupations	4.9	5.4	7.0	7.5
Process plant and machine operatives	4.8	4.5	6.9	6.9
Elementary occupations	6.1	6.8	9.9	10.5

Source: ONS Census 2021.

- 4.3.10 According to Census data, since 2011 the proportion of the population in Sawbridgeworth working in traditionally higher skilled occupations has increased²². The proportion of the population working as managers, directors and senior officials has increased from 14.4% to 17.8% in Sawbridgeworth over the 2011-2021 period. The proportion of the population working in professional occupations has increased from 17.7% to 22.2%. This notable increase in the proportion of higher skilled occupations has also occurred 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 in this section refers to enterprises. These are defined by ONS as an organisational unit producing goods or services, which has a certain degree of autonomy in decision-making. This is opposed to local units, which are the individual sites that belong to an enterprise, when an enterprise has multiple sites. This is due to data availability at the Sawbridgeworth level.
- 4.4.2 Table 4-6 shows that the vast majority of businesses in Sawbridgeworth²³ are classed as micro (defined as companies employing up to nine employees), comprising 92.8% of enterprises. This is higher than the rates in East Herts (87.7%), the East of England (85.3%) and England (84.6%). Conversely, Sawbridgeworth has a notably lower proportions of small and medium-sized businesses than the comparator areas. Sawbridgeworth has no large businesses.

Table 4-6 Business counts by employment size band (2025)

	Sawbridgeworth (%)	East Herts (%)	East of England (%)	England (%)
Micro (0-9)	92.8	87.7	85.3	84.6
Small (10 to 49)	6.0	10.1	11.9	12.4
Medium (50 to 249)	1.2	2.0	2.5	2.6
Large (250+)	0.0	0.3	0.3	0.4

Source: ONS UK Business Counts 2025.

- 4.4.3 The change in business counts from 2016 to 2025 is presented in Table 4-7 and shows that construction has had the greatest increase in Sawbridgeworth by 10 enterprises. This growth is likely to have contributed to the increase in self-employment (as outlined in paragraph 4.2.11), given that construction and building trades are commonly associated with sole traders and small, self-employed businesses. Other sectors to record increases in business counts include agriculture, forestry & fishing, transport & storage (including postal), and professional, scientific & technical.
- 4.4.4 Conversely, the information & communication sector registered the greatest fall in business counts over the period, by 15 enterprises. The business administration & support services

²² ONS (2012) 2011 Census.

²³ Business counts data is not available at LSOA level. Therefore, for this indicator the analysis uses Middle Layer Super Output Areas (MSOA) which 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 east and south of Sawbridgeworth located within Epping Forest. The MSOA comprising the Study Area is E02004888 : East Hertfordshire 011.

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 2016-2025

Economic activity status	2016	2025	Change (2016 to 2025)
Agriculture, forestry & fishing	0	5	5
Mining, quarrying & utilities	5	5	0
Manufacturing	25	25	0
Construction	60	70	10
Motor trades	20	20	0
Wholesale	15	10	-5
Retail	35	30	-5
Transport & storage (inc. postal)	5	10	5
Accommodation & food services	20	20	0
Information & communication	45	30	-15
Financial & insurance	10	10	0
Property	10	10	0
Professional, scientific & technical	70	75	5
Business administration & support services	45	35	-10
Public administration & defence	0	0	0
Education	10	5	-5
Health	15	15	0
Arts, entertainment, recreation & other services	35	35	0
Total	420	415	-5

Source: ONS UK Business Counts 2025.

4.5 Commuter trends

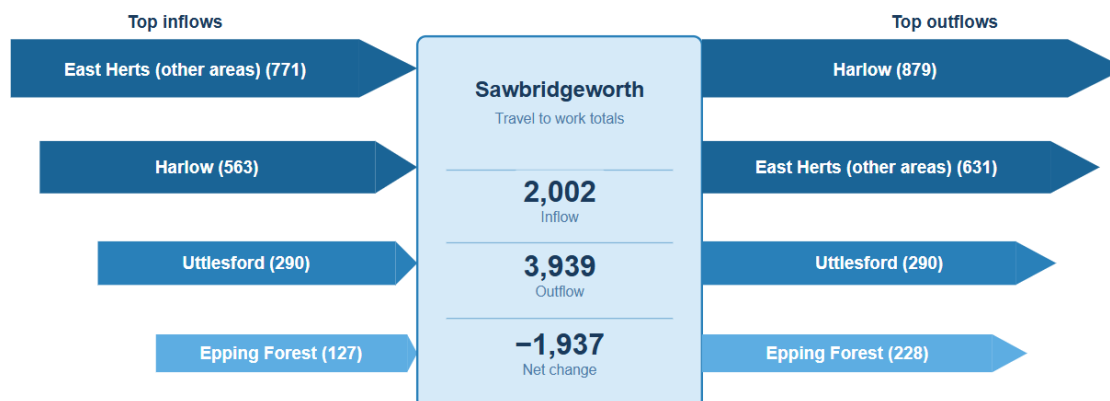
- 4.5.1 Data from the 2011 Census²⁴ showing the location of usual residence and place of work by age is the most recently available data regarding commuter trends for small areas.
- 4.5.2 While the ONS 2021 Census Origin-Destination data has been released, Census 2021 took place during the Covid-19 pandemic, a period of unparalleled and rapid change; the national lockdown, associated guidance and furlough measures will have affected the origin-destination data. Therefore, using this 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.
- 4.5.3 At the time of the Census 2011, there were 4,461 people in work who lived in Sawbridgeworth, with 522 individuals that both lived and worked within the town. This reflects a self-containment rate of 11.7%. As would be expected for a smaller settlement, this is below the self-containment rate of East Herts (49.3%). Commuter outflows from Sawbridgeworth totalled 3,939, with key destinations for work including Harlow (879), other areas in East Hertfordshire (631), Uttlesford (223), and Epping Forest (228).
- 4.5.4 Conversely, Sawbridgeworth registered 2,002 commuter inflows for work, with the highest inflows coming from other areas in East Hertfordshire (771), Harlow (563), Uttlesford (290),

²⁴ ONS, (2012); Census 2011.

and Epping Forest (127). Therefore, outward commuter movements from Sawbridgeworth (3,094) exceed inward commuter movements (2,002) by 1,937.

4.5.5 The largest inflows and outflows for Sawbridgeworth as described above are illustrated in Figure 4-4.

Figure 4-4 Sawbridgeworth 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 Sawbridgeworth (522) would have now increased, given the increase in hybrid working accelerated by trends associated with the Covid-19 pandemic.

4.6 Summary

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

- Population growth across Sawbridgeworth was lower between 2015 and 2024 than in East Herts and the East of England, but higher in England. Sawbridgeworth has a lower proportion of 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 Sawbridgeworth level. The current housing trajectory of allocated/permitted sites suggests the potential for 184 new homes to be delivered in Sawbridgeworth. With an average household size of 2.37 in East Herts, this indicatively suggests the potential for 436 additional residents, of which 270 would be expected to be aged 16 and economically active.
- Sawbridgeworth has a lower economic activity rate than East Herts, but greater than the East of England and England. In addition, Sawbridgeworth has a lower employment rate than East Herts, is in line with England, and greater than the East of England. However, the economic activity rate in Sawbridgeworth has fallen significantly since 2011, at 61.9% in 2021, and 75.1% in 2011, primarily driven by an increase in retirement.
- A greater proportion of the population in Sawbridgeworth is educated to degree-level or equivalent compared to the East of England and England as a whole, but lower than in East Herts. Sawbridgeworth also has a lower proportion of residents with no qualifications compared to the East of England and England, but lower greater than East Herts.
- Sawbridgeworth has a distinct workplace employment profile. It registers sizable proportions of employment in the health industry, well above the comparator areas. In terms of the sectors driving industrial employment, construction accounts for a higher share of employment compared to all comparator geographies, while manufacturing represents a greater share than in East Herts, but remains below regional and national

levels. In terms of the sectors driving office-based employment, the professional, scientific & technical services industry is broadly in line with the comparator geographies, however the business administration & support services industry is significantly smaller.

- Since 2015, Sawbridgeworth has seen most notable employment growth in the education industry, with other increases in employment registered in construction, property, accommodation & food services, wholesale, and mining, quarrying & utilities sectors. Conversely, there has been a fall in employment in health, retail, information & communication, business administration & support services, and manufacturing sectors in particular across Sawbridgeworth.
- The majority of businesses in Sawbridgeworth are classed as micro enterprises. This is higher than the rates in East Herts, East of England, and England. Sawbridgeworth has a lower rate of small and medium-sized businesses than the comparator areas, with no large-sized businesses present in Sawbridgeworth.
- Outward commuter movements from Sawbridgeworth exceed inward commuter movements by 1,937. The local authorities of significance for Sawbridgeworth include Harlow, other areas in East Herts, and Uttlesford. At the time of the 2011 Census, Sawbridgeworth had a self-containment rate of 11.7%, lower than East Herts, 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 Sawbridgeworth. Reference is also made to comparator geographies, including the wider local authority, regional, and national data. This reflects the fact that the commercial property market in Sawbridgeworth 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 the most recent available information on CoStar (2026)²⁵ which represents a comprehensive database of up-to-date property market data. Trends are presented where applicable.
- 5.1.3 Commercial properties comprised of office (E(g)(i)),²⁶ industrial (general industrial (B2)) and warehousing and storage (B8)²⁷ types are considered, in line with the definition of employment land. 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 and warehousing market (B2 and 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 Sawbridgeworth, in comparison with East Herts, the East of England, and England. Sawbridgeworth accounts for 5.8% of office properties within East Herts, with other notable office locations including Bishop's Stortford and Hertford. Within Sawbridgeworth, office properties are primarily concentrated within the built-up area of the town, particularly along Bell Street, including Sawbridgeworth Town Council's offices at Sayesbury Manor Cottage. Additional office properties are located to the north of Bell Street, along London Road and in proximity to Station Road (The Maltings). There are a few office properties are dispersed in the rural areas surrounding the built-up areas of the towns.
- 5.2.2 It should be noted that Charringtons House in Bishop's Stortford has recently been vacated awaiting redevelopment and is not included in the East Herts data in this section. Furthermore, prominent office stock in Sawbridgeworth, comprising four properties accommodating office uses alongside other industrial and retail occupiers at The Maltings, while inside the defined study area, falls outside of East Herts, in Epping Forest.

Buildings and floorspace

- 5.2.3 According to CoStar and shown in Table 5-1, there are 23 office properties in Sawbridgeworth, comprising 5,278 sqm of floorspace. There are 397 office properties in East Herts, comprising around 199,723 sqm of floorspace. Therefore, office properties in Sawbridgeworth comprise 5.8% of the office properties in East Herts and 2.6% of the floorspace.
- 5.2.4 As reflected in the number of properties and stock of floorspace, Conversations with agents highlighted that Sawbridgeworth was not perceived as having a strong office market, with office occupiers more drawn to the larger towns in East Herts or larger towns/cities outside of the District. Activity and demand is accordingly muted, with limited churn in the Sawbridgeworth market.

²⁵ CoStar (2026). Available at: <https://www.costar.com/news/gb> [Accessed: 28/04/26].

²⁶ Note that E(g)(ii) is not covered in this section as CoStar does not return any entries for this use class in Sawbridgeworth.

²⁷ Note: There are no light industrial properties (E(g)(iii)) in Sawbridgeworth, based on CoStar data.

Table 5-1 Office properties – buildings and floorspace (2025 Q4)

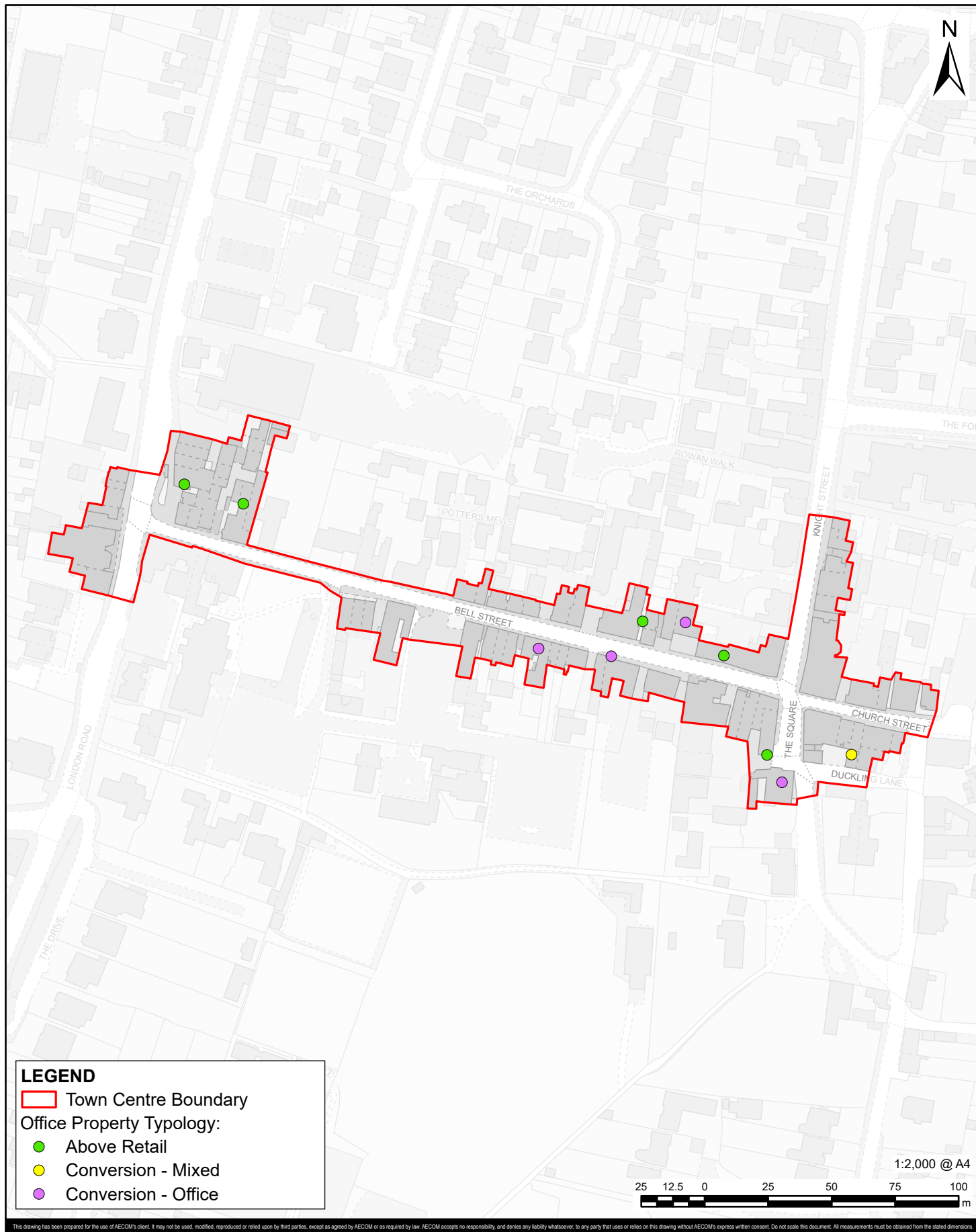
	Sawbridgeworth	East Herts	East of England	England
Number of properties	23	397	11,169	111,150
Floorspace (square metres)	5,278	199,723	10,000,000	117,000,000

Source: CoStar (2026).

- 5.2.5 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.
- 5.2.6 Against this wider context, the following analysis narrows its focus to Sawbridgeworth town centre. This section of the analysis considers the breakdown of office building “typologies” in Sawbridgeworth that support employment in Sawbridgeworth and reflect the changing ecology of work and employment.
- 5.2.7 As shown in Figure 5-1²⁹, office stock in the town centre stock is provided above retail units and through the conversion of existing buildings, which are often old (being built before 1960, shown in further detail in Figure 5-4), owing to the historic nature of the town centre.
- 5.2.8 It should be noted that Sawbridgeworth Town Council’s offices, at Sayesbury Manor Cottage, Bell Street, fall outside of the town centre boundary but are a notable property.

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 of this report.



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FIGURE TITLE
Office Properties in Sawbridgeworth
Town Centre by Typology

FIGURE NUMBER
Figure 5-1

NOTES
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Vacancy

- 5.2.9 In 2025 Q4, the vacancy rate of office properties in Sawbridgeworth (11.4%) was lower than in East Herts (13.3%) but greater than the East of England (6.4%) and England (8.8%), as shown in Table 5-2. It should be noted that the Sawbridgeworth figure reflects a deviation from the previous quarter, when it stood at 5.8%, however 111 London Road recently became vacant and accounts for this uptick which should be borne in mind in any interpretation of this trend. It should also be noted that the East Herts figure reflects a significant deviation from the previous quarter, when it stood at 3.1%, underpinned by office floorspace comprising 18,859 sqm being recently vacated at Pegs Lane, County Hall.
- 5.2.10 The office floorspace vacancy rate for Sawbridgeworth is higher than the optimal frictional level of 5-8%, which indicates a balanced market in terms of supply and demand. However, owing to the small amount of stock there is significant volatility in the data.

Table 5-2 Office properties – vacancy (2025 Q4)

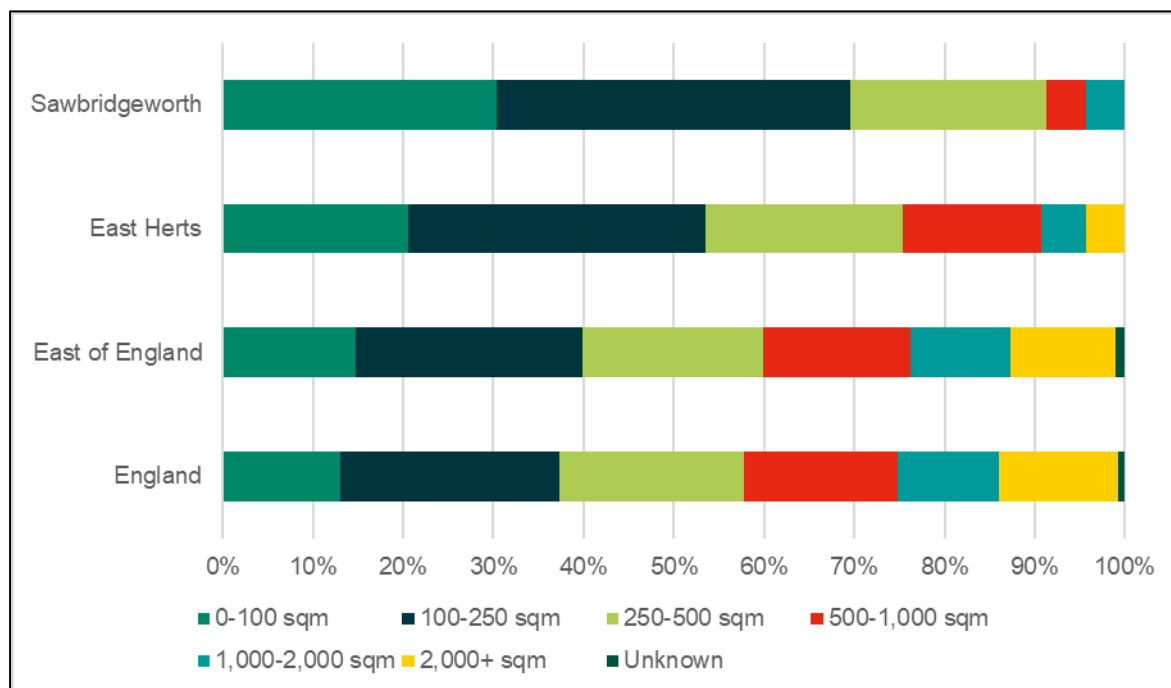
Floor Space Type	Sawbridgeworth	East Herts	East of England	England
Vacancy rate (%)	11.4	13.3	6.4	8.8
Vacant floorspace (sqm)	600	25,390	632,776	10,254,308

Source: CoStar (2026)

- 5.2.11 Looking at trends in vacancy levels over time, CoStar does not provide complete vacancy rates for Sawbridgeworth, with a substantial proportion of quarters recorded as unknown, a reflection of small sample size. As such, the available data should be interpreted with caution.
- 5.2.12 Where data is available, Sawbridgeworth exhibits a variable pattern, with vacancy rates of 2.2% between 2014 Q1 and 2015 Q2, rising to 5.9% in 2017 Q2, 6.0% in 2023 Q4, and 5.8% in 2025 Q3. Despite this, Sawbridgeworth recorded lows of 0.0% in 2023 Q3 and 2020 Q4, before increasing to a peak of 11.4% in 2025 Q4. In comparison, East Herts vacancy rates remain relatively consistent, with lows of 1.1% in 2019 Q4 and 2020 Q1 and highs of 4.0% in 2025 Q2, followed by a sharp rise in 2025 Q4 (13.3%) driven by the significant volume of floorspace (18,859 sqm) at Pegs Lane – County Hall in Hertford and Ware – being brought to market. Prior to 2025 Q3, both East Herts and Sawbridgeworth recorded lower vacancy rates than both the East of England and England. In Sawbridgeworth town centre, vacancy rates have remained at 0.0% between 2022 Q4 and 2025 Q4, falling from 4.8% in 2022 Q3, reflecting typical short-term fluctuations associated with office turnover. At the local level, Sawbridgeworth's volatility is likely reflective of its relatively small office market, where vacancy rates are more sensitive to turnover.

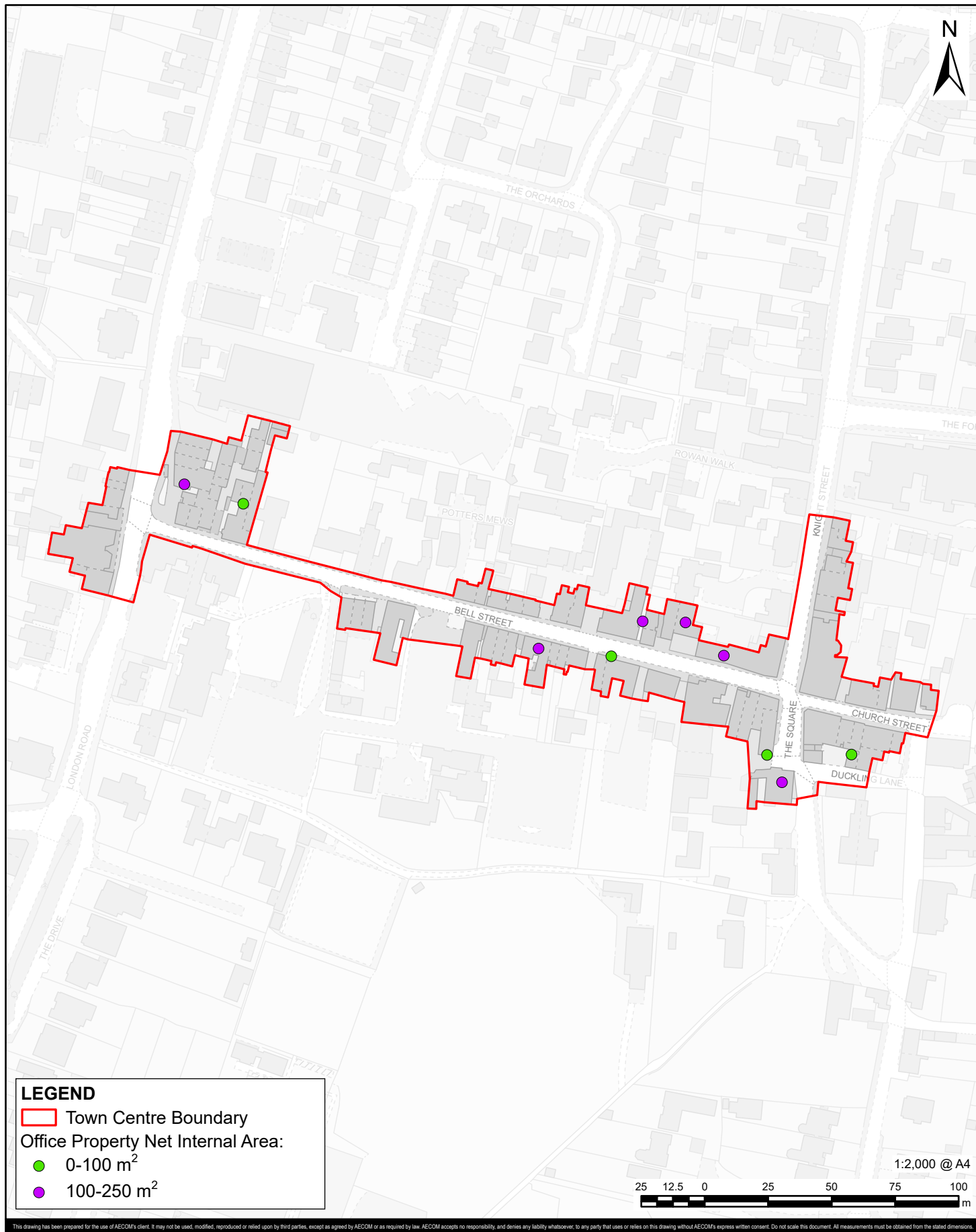
Size

- 5.2.13 Office properties in Sawbridgeworth range in size from 36 sqm to 1,095 sqm. In general, office properties in both Sawbridgeworth and East Herts tend towards the smaller sizes, as shown in Figure 5-2, with the greatest proportion of properties being between 100 and 250 sqm in size, followed by 0-100 sqm, and 250-500 sqm. In Sawbridgeworth, 39.1% of office properties are 100-250 sqm, as shown in Figure 5-2, greater than East Herts (32.9%), the regional (25.1%), and national (24.4%) averages.
- 5.2.14 Conversations with agents reflected that demand for office space in Sawbridgeworth is predominantly from small, local professional services firms, with prominent buildings such as Weston House and Allen House in the Maltings near the station housing occupiers such as architects, lawyers, accountants, marketing services and recruitment consultants. Though it should be noted that these properties fall outside of the East Herts boundary.

Figure 5-2 Office properties – building stock size (2025 Q4)

Source: CoStar (2026)

5.2.15 Figure 5-3 shows the spatial distribution of office properties by size in Sawbridgeworth town centre. This highlights that properties tend to be 100-250 sqm in size, with all properties below 250 sqm. The largest town centre office building is at The Square, providing at 214 sqm. As previously noted, Sawbridgeworth Town Council's offices, fall outside of the town centre boundary but are one of the larger office premises in the built up area, providing 171 sqm of floorspace.



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FIGURE TITLE
Office Properties in Sawbridgeworth
Town Centre by Size

FIGURE NUMBER
Figure 5-3

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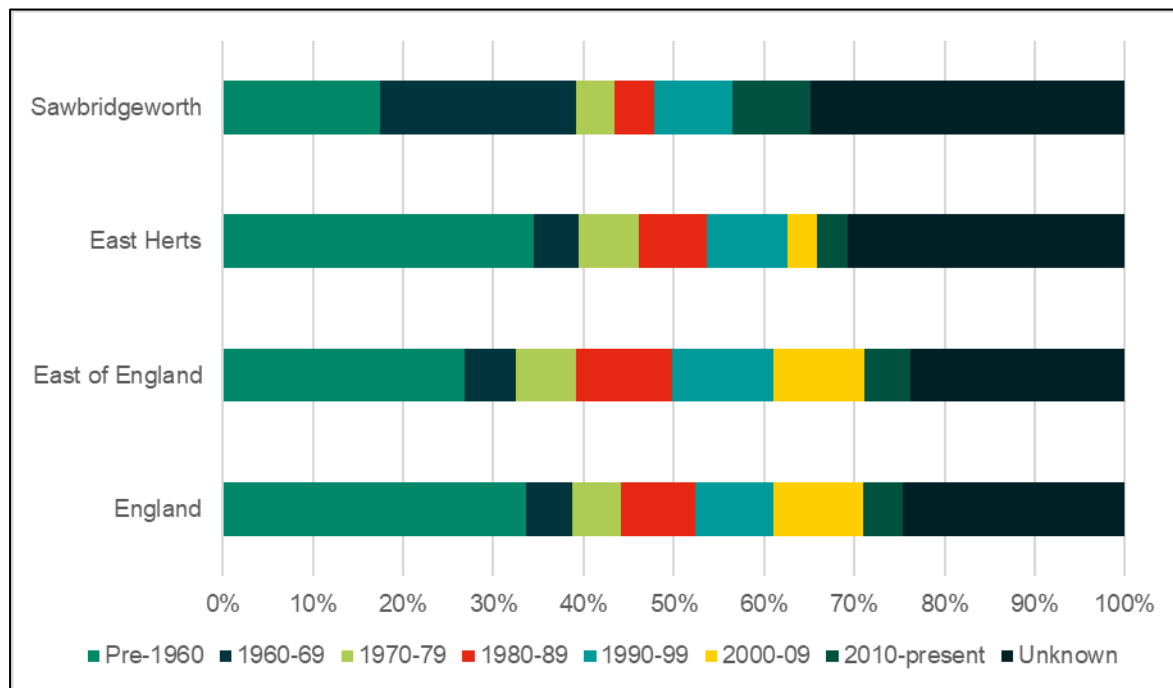
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Age

- 5.2.16 As shown in Figure 5-4, office properties in Sawbridgeworth tend to be old in nature³⁰. The greatest proportion of office properties in Sawbridgeworth were built between 1960 and 1969, at 21.7%, significantly greater than in East Herts (4.9%), the East of England (5.7%), and England (5.1%). However, 17.4% of office properties were built before 1960 in Sawbridgeworth, lower than in East Herts (34.5%), the East of England (26.8%), and England (33.6%). In comparison, modern office development is limited, with 0 properties built between 2000-09 and 8.7% of properties (2 properties) built since 2010. The latter is greater than in East Herts (3.5%), the East of England (5.1%), and England (4.5%).

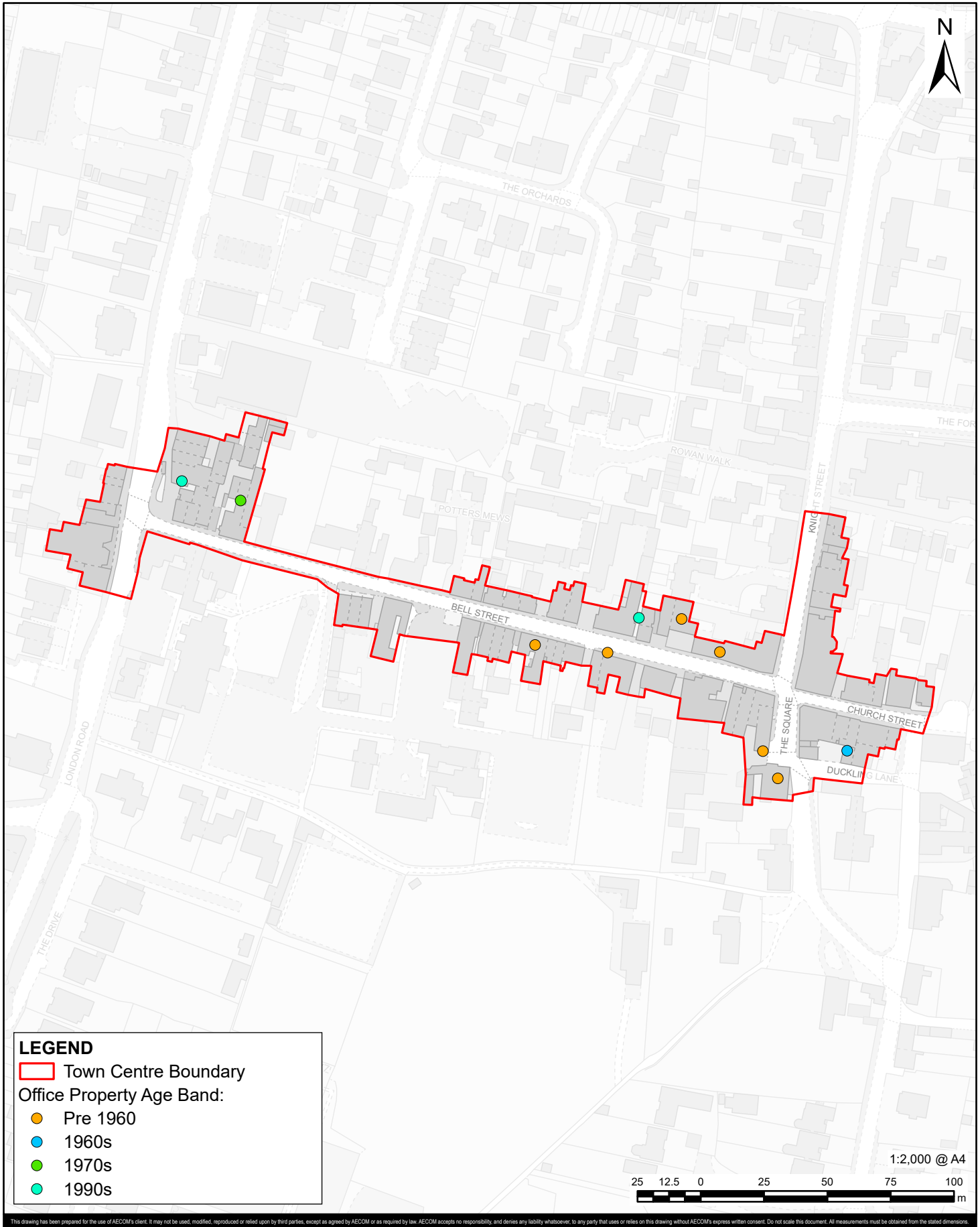
Figure 5-4 Office properties – building stock age (2025 Q4)



Source: CoStar (2026)

- 5.2.17 Floorspace patterns broadly mirror these trends, with 41.5% of office floorspace in Sawbridgeworth being built before 1960, compared to 5.8% after 2010. However, Sawbridgeworth has a greater proportion of office 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 Sawbridgeworth, office properties built before 1960 tend to be larger in size than more modern developments.
- 5.2.18 Figure 5-5 shows the spatial distribution of office properties by age in Sawbridgeworth town centre. The majority of properties were constructed before 1960, reflecting the historic nature of the town centre. More recent development is limited to two properties constructed in the 1990s.

³⁰ It is recognised that the age of a notable proportion of office properties in Sawbridgeworth is unknown. This suggests that the proportion of older stock may be understated in the available data, as properties with unknown age are more likely to be older due to limited or incomplete documentation.



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FIGURE TITLE
Office Properties in Sawbridgeworth
Town Centre by Age

FIGURE NUMBER
Figure 5-5

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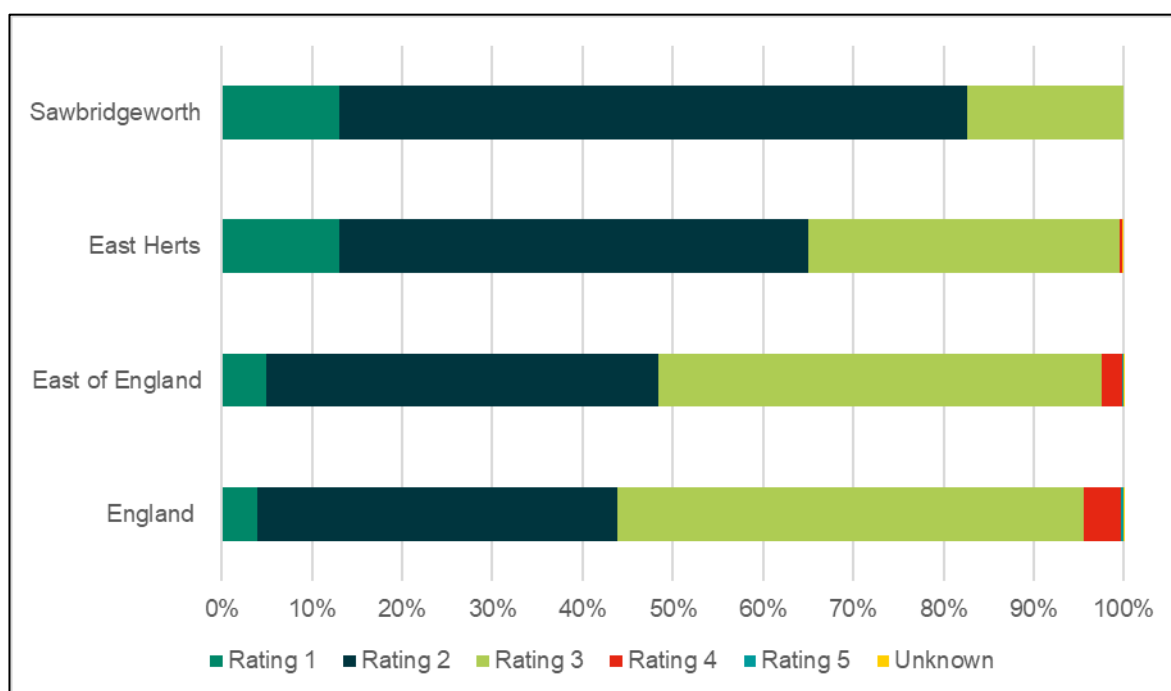
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Condition

- 5.2.19 As shown in Figure 5-6, the condition of office properties in Sawbridgeworth is worse than that of East Herts, the East of England, and England. In Sawbridgeworth, 82.6% of office properties have a quality score of 1 or 2³¹ on CoStar, significantly greater than East Herts (65.0%), the East of England (48.4%), and England (43.9%).
- 5.2.20 In addition, a lower proportion of the office property stock have a quality rating of 3 in Sawbridgeworth (17.4%) than East Herts (34.5%), the East of England (49.1%), and England (51.7%). Higher quality stock is located on London Road and Station Road. There are no office properties in Sawbridgeworth with a quality rating of 4 and 5 (best). Therefore, there is a lower proportion of office properties in Sawbridgeworth with a good condition rating compared to East Herts, the East of England, and England.
- 5.2.21 It is also worth noting that a significant proportion of office stock in Sawbridgeworth is concentrated within and adjacent to the historic town centre, where tight spatial constraints limit opportunities to deliver modern, purpose-built office space. As a result, the lower quality office stock reflects the town's constraints and location within conversions and older buildings.

Figure 5-6 Office properties – building stock condition (2025 Q4)



Source: CoStar (2026).

Rental values

- 5.2.22 As set out in Table 5-3, office rental values average £214.00/sqm in 2025 Q4 in Sawbridgeworth. Rental values in Sawbridgeworth are slightly higher than in East Herts (£210.39/sqm), but lower than the East of England (£240.44/sqm) and England (£345.87/sqm).

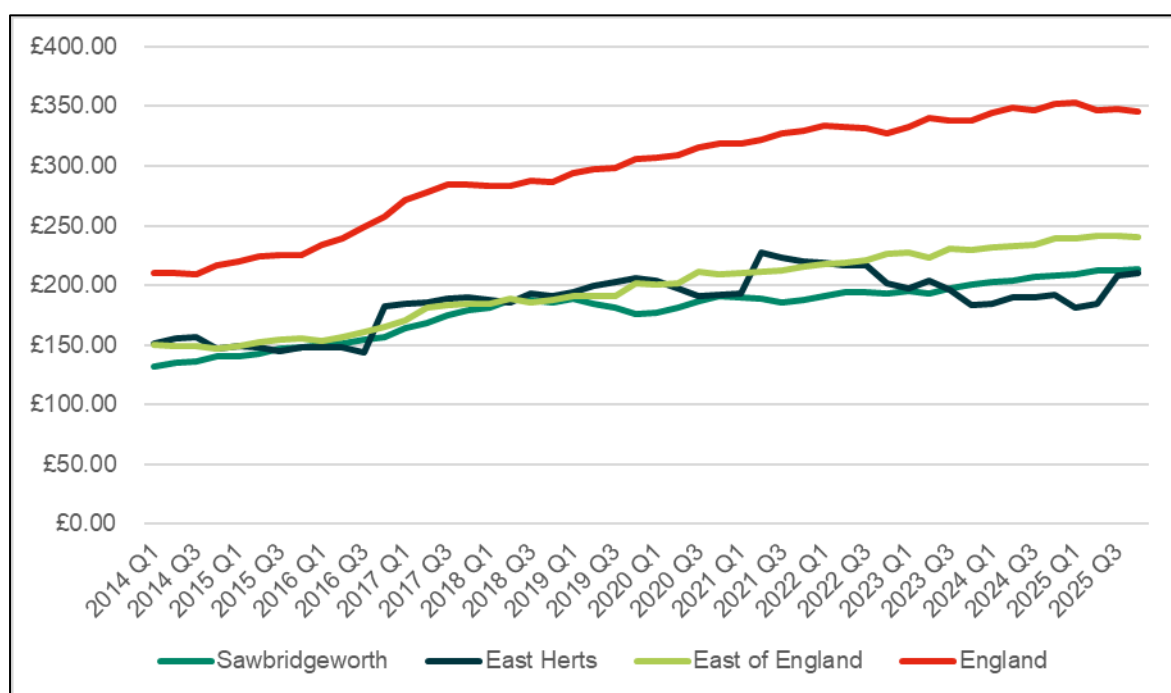
³¹ The CoStar Quality Score is a measure of the average condition of building stock according to the CoStar scoring system. The overall average score is according to the average of buildings for which data is available and weighted based on the floorspace of each property. Building stock is rated, based on a number of indicators of quality and amenity, on a scale between 1 (worst quality) and 5 (best quality).

Table 5-3 Office properties – market rental values (£/sqm, 2025 Q4)

Property Type	Sawbridgeworth	East Herts	East of England	England
Office	214.00	210.39	240.44	345.87

Source: CoStar (2026).

- 5.2.23 Figure 5-7 presents the change in rental values in Sawbridgeworth, East Herts, East of England, and England between 2014 and 2025.
- 5.2.24 Office rental values in Sawbridgeworth increased steadily between 2014 and 2025, broadly in line with trends observed across the East of England and England, albeit England has exhibited higher growth. Conversely, rental values in East Herts have largely plateaued since 2017, despite a sharp increase in 2021 followed by a subsequent decline. While a similar pattern is evident in Sawbridgeworth, these fluctuations have been less pronounced than those observed across East Herts.
- 5.2.25 Between 2014 Q1 and 2025 Q4, market rental values in Sawbridgeworth increased by 61.7% (£81.63/sqm), significantly greater than East Herts (38.9%, £58.93/sqm), and slightly greater than the East of England (60.4%, £90.50/sqm). England exhibited the greatest increase over the period, by 64.8% (£136.03/sqm). However, the limited amount of stock should be taken into consideration in interpreting this trend.

Figure 5-7 Office properties – market rental value (£/sqm, 2014 Q1 – 2025 Q4)

Source: CoStar (2026).

Net absorption

- 5.2.26 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. It should be noted that net absorption figures for Sawbridgeworth are not provided for all quarters, and no data was available in 2014 and 2016.

- 5.2.27 Overall, Sawbridgeworth records relatively small and more volatile changes, with shifts between positive and negative absorption, reflecting its limited stock and sensitivity to individual occupier movements. In 2014, 2017, and 2022, net absorption in Sawbridgeworth was 0, with a high of 602 sqm in 2024 and a low of -600 sqm in 2025. Notably, there is some evidence of short-term rebalancing, whereby negative absorption in one year is followed by a comparable positive figure in the subsequent year (for example, -24 sqm in 2018 followed by 24 sqm in 2019, and -172 sqm in 2020 followed by 172 sqm in 2021), reflecting occupier movements rather than a change in overall floorspace.
- 5.2.28 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.
- 5.2.29 Trends in net absorption observed are indicative of fluctuating demand for floorspace over the period, with a more volatile pattern in Sawbridgeworth compared with East Herts. Changes in working patterns and increased economic uncertainty are likely key contributing factors in falling demand, or fluctuating demand in the case of East Herts. The sectoral composition of employment in Sawbridgeworth suggests it would be less influenced by these trends compared with East Herts. However, other indicators such as the type and quality of space and fit with current market requirements – notwithstanding the small amount of stock and associated volatility in the data – will also play a part such that it is not possible to be definitive in assigning reasons behind the trends.

Summary

- 5.2.30 In summary, a number of trends and characteristics are apparent with respect to the office market in Sawbridgeworth:
- Sawbridgeworth represents a small share of the East Herts office market, accounting for 5.8% of office properties and 2.6% of the floorspace. Conversations with agents highlighted that Sawbridgeworth was not perceived as having a significant office market, as reflected in the number of properties and stock of floorspace, with office occupiers more drawn to the larger towns in East Herts or larger towns/cities outside of the District. Activity and demand is accordingly muted, with limited churn in the market.
 - Vacancy levels have displayed a relatively steady trend from 2014 Q1 to 2025 Q4, peaking at 11.4% in 2025 Q4. East Herts also 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 East Herts rose drastically, attributable to approximately 19,000 sqm being vacated at County Hall in Hertford. Prior to 2025 Q3, vacancy rates in Sawbridgeworth and East Herts remained below the East of England and England.
 - Sawbridgeworth's office market is dominated by smaller units, with the largest share of properties falling between 100–250 sqm (39.1%), greater than the East Herts, regional, and national averages. Conversations with agents reflected that demand for office space in Sawbridgeworth is predominantly from small, local professional services firms, with occupiers such as architects, lawyers, accountants, marketing services and recruitment consultants – similar to those occupying space across East Herts.
 - The office stock in Sawbridgeworth is relatively old, with 17.4% of offices being built before 1960 and 21.4% built between 1960 and 1969. Modern office development (2000-present) is limited, accounting for 8.7% of stock (equating to 2 properties), regional and national averages, but above East Herts. Floorspace trends broadly reflect this, although Sawbridgeworth has a higher proportion of pre-1960 floorspace than East Herts, suggesting older buildings tend to be larger.

- Building condition is relatively worse in Sawbridgeworth compared with East Herts, the East of England, and England, however this likely reflects the historic nature of the town centre.
- Sawbridgeworth attracts slightly higher market rental values for office use classes than East Herts, but lower market rental values than the regional and national averages. Overall, values in Sawbridgeworth and East Herts are reflective of the small size of the market and the age, size and quality profile of office stock.

5.3 Industrial and Warehousing and Storage Market

- 5.3.1 This section presents findings related to the industrial (B2 uses)³² and warehousing and storage (B8 uses) property market in Sawbridgeworth, benchmarked against East Herts, the East of England, and England. Within the Sawbridgeworth area, industrial properties are located to the north and south of the town, around Spellbrook, and close to Harlow (Riverside Business Park), a, with one property in the centre, at the Maltings.
- 5.3.2 Given the lack of industrial and warehousing and storage stock within Sawbridgeworth, it should be noted that comparisons to East Herts, the East of England, and England are likely to be skewed significantly by small changes.

Buildings and floorspace

- 5.3.3 According to CoStar, and as shown in Table 5-4, there are six industrial and warehousing and storage properties in Sawbridgeworth, comprising 19,015 sqm of floorspace. There are 233 such properties in East Herts comprising around 493,892 sqm of floorspace. Therefore, properties in this use in Sawbridgeworth comprise 2.6% of the total properties in East Herts and 3.9% of the floorspace, suggesting that industrial and warehousing and storage properties are, on average, larger in Sawbridgeworth than across East Herts.
- 5.3.4 Since 2014, there has been no change in the number of industrial and warehousing and storage properties or floorspace in Sawbridgeworth.

Table 5-4 Industrial and warehousing and storage properties – buildings and floorspace (2025 Q4)

	Sawbridgeworth	East Herts	East of England	England
Number of properties	6	233	11,813	52,100
Floorspace (sqm)	19,015	493,892	28,517,987	138,867,378

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 5-5. As of 2025 Q4, such rates in Sawbridgeworth (6.1%) are greater than East Herts (4.1%), the East of England (5.5%), and England (4.2%). It should be noted that the vacancy rate in Sawbridgeworth recorded in 2025 Q4 is higher than previous quarters (i.e. 1.2% in Q1, and 5.5% in Q2 and Q3).
- 5.3.6 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 and warehousing and storage space in Sawbridgeworth falls within this range. Given the very small size of the market, vacancy rates are subject to volatility and should therefore be interpreted with caution.

Table 5-5 Industrial and warehousing and storage properties – vacancy (2025 Q4)

	Sawbridgeworth (%)	East Herts (%)	East of England (%)	England (%)
Vacancy rate (%)	6.1	4.1	5.5	4.2
Vacant floorspace (sqm)	1,151	20,008	1,567,051	5,789,115

Source: CoStar (2026).

- 5.3.7 It should be noted that vacancy data for Sawbridgeworth is not available on CoStar between 2015 Q1 and 2024 Q4. The more pronounced quarter-on-quarter fluctuations observed in

³² Note: There are no light industrial properties (E(g)(iii)) in Sawbridgeworth, based on CoStar data.

Sawbridgeworth are likely to reflect the very small size of the local industrial and warehousing and storage market. Generally, larger markets such as East Herts, the East of England and England are less prone to volatility, as changes in the availability or occupation of individual units have a more limited impact on overall vacancy rates.

- 5.3.8 In 2014, Sawbridgeworth recorded relatively low vacancy rates, at 2.8% in Q1 and Q2, declining to 1.6% in Q3 and Q4. These levels were below those recorded across all comparator areas over the period where the lowest vacancy rate was recorded in 2014 Q4 for all geographies, at 3.0% in East Herts, 3.8% in East of England, and 3.5% in England.
- 5.3.9 In 2025, vacancy in Sawbridgeworth was at its lowest level in Q1 at 1.2%, before increasing to 5.5% in Q2 and Q3, and rising further to 6.1% in Q4. Despite this volatility, vacancy rates in Sawbridgeworth were broadly comparable to those observed in wider markets over the year. In 2025, vacancy ranged between 2.7% and 4.1% in East Herts, 5.0% and 5.5% in the East of England, and 3.7% and 4.2% nationally.
- 5.3.10 East Herts, the East of England, and England all saw 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 normalised³³. Wider economic uncertainty, including inflation and rising geopolitical tensions, have also been viewed as contributing factors to the increase in vacancy observed over recent years³⁴.

Rental values

- 5.3.11 The market rental values per square metre for industrial and warehousing and storage floorspace are set out in Table 5-6.

Industrial and warehousing and storage properties in Sawbridgeworth (£143.17/sqm) had a slightly lower market rental value than East Herts (£145.75/sqm), but greater than the East of England (£115.76/sqm), and England (£98.57/sqm).

Table 5-6 Industrial and warehousing and storage properties – market rental values (£/sqm, 2025 Q4)

	Sawbridgeworth	East Herts	East of England	England
Rental value (£/sqm)	143.17	145.75	115.76	98.57

Source: CoStar (2026).

- 5.3.12 It should be noted that market rental value data for Sawbridgeworth is not available on CoStar between 2016 Q1 and 2024 Q4. Across the period, industrial and warehousing and storage market rents in Sawbridgeworth increased from £50.01/sqm in 2014 Q1 to £143.17/sqm in 2025 Q4, indicating an overall upward trend across the period. A peak of £145.53/sqm was recorded in 2025 Q1, with a low of £50.59/sqm in 2014 Q2 and Q3.
- 5.3.13 Across East Herts, higher market rental values were sustained as a whole across the period, compared to the East of England and England. East Herts in particular 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.
- 5.3.14 Overall, Sawbridgeworth exhibited the greatest increase in market rental value from 2014 Q1 to 2025 Q4, notably by 170.1% (£90.16/sqm), followed by East Herts (112.1%, £77.04/sqm), the East of England (110.6%, £60.79/sqm), and England (97.3%, £48.62/sqm).

³³ 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].

³⁴ 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].

Net absorption

- 5.3.15 Net absorption data for Sawbridgeworth is not available on CoStar between 2016 and 2024. Available net absorption data in Sawbridgeworth indicates a low of -1,152 sqm in 2025, compared with -93 sqm in 2014, and a peak net absorption of 310 sqm in 2015.
- 5.3.16 In East Herts, net absorption across the period fluctuated considerably, from a low of -7,641 sqm in 2025 to a peak of 54,331 sqm in 2018. Prior to 2019, net absorption in East Herts was generally positive, with greater fluctuation from 2019 onwards.
- 5.3.17 Whilst the lack of data at Sawbridgeworth level limits interpretation of trends, the general trend points to negative net absorption of warehousing and storage space in this area 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 more of a constrained market for space locally.

Summary

- 5.3.18 In summary, a number of trends and characteristics are apparent with respect to the industrial and warehousing and storage market in Sawbridgeworth:
- The industrial and warehousing and storage market in Sawbridgeworth is very small, comprising 6 properties providing 19,015 sqm of floorspace.
 - The vacancy rate for floorspace in Sawbridgeworth is above the East Herts, East of England, and England average, though, at 6.1%, in line with the frictional vacancy rate of 5-8% generally viewed to represent a property market in balance. However, given the small market size, vacancy rates are subject to volatility.
 - Sawbridgeworth attracts higher market rental values for such property types than the East of England and England, but lower than East Herts.
 - Between 2014 and 2025, market rental values for industrial and warehousing and storage floorspace exhibited an overall increase. The increase in Sawbridgeworth is greater than across East Herts, the East of England, and England.
 - Across Sawbridgeworth and East Herts, net absorption of such floorspace fluctuated considerably between 2014 and 2025.

5.4 Influences on Demand

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

Harlow and Gilston Garden Town

- 5.4.2 The Harlow and Gilston Garden Town (HGGT) is a strategic growth initiative centred on Harlow, designated as a Garden Town by the Ministry of Housing, Communities and Local Government (MHCLG) in January 2017³⁵. It is being delivered through a partnership between East Herts District Council, Epping Forest District Council, Essex County Council, Harlow District Council, and Hertfordshire County Council. The HGGT seeks to deliver approximately 16,000 homes by 2033, with a further 7,000 homes beyond this period, alongside employment space and supporting infrastructure through a series of new villages and urban extensions. The HGGT aims to create sustainable communities within the UK Innovation Corridor Core Area, with the HGGT expected to accommodate an additional 45,000 residents by 2045, requiring the creation of an additional 23,000 jobs to support a balanced labour market³⁶. Construction of homes has commenced in the East of Harlow

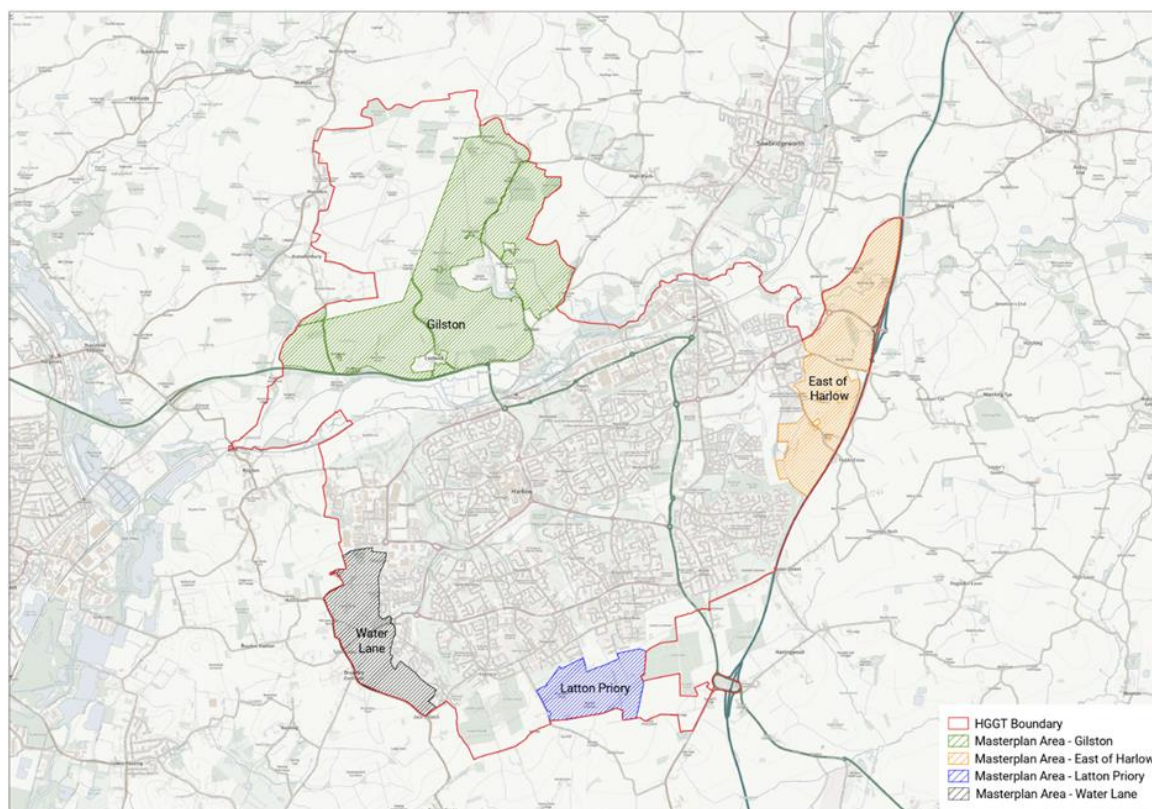
³⁵ Harlow & Gilston Garden Town (HGGT) (n.d.) About the Garden Town. Available at: <https://hggc.co.uk/about-us/> [Accessed: 07/04/26].

³⁶ Harlow & Gilston Garden Town (HGGT) (2023) Harlow and Gilston Garden Town Strategic Economic Framework. Available at:

site, the first sustainable transport corridor is already complete, and works have commenced on the Central Stort Crossing infrastructure that will connect the Gilston Area to Harlow, enabling delivery of homes from late 2027 in the Gilston Area. The first primary school is anticipated to open in September 2030, providing local employment opportunities in education.

- 5.4.3 The HGGT comprises the existing town of Harlow alongside four new strategic sites: the Gilston Area to the north of Harlow East of Harlow to the east, Latton Priory to the south, and Water Lane to the west, as shown in Figure 5-8. The Gilston Area, located to the south-west of Sawbridgeworth, adjoins the study area defined in Section 4.1 of this report, and will comprise seven new villages. Part of the northern extent of the East of Harlow allocation also falls within the Sawbridgeworth study area.

Figure 5-8 Harlow & Gilston Garden Town Map



Source: Harlow & Gilston Garden Town (2024) HGGT Map.

- 5.4.4 Development across the HGGT is guided by Garden City principles, with new communities designed as distinct, walkable neighbourhoods incorporating local centres, schools, green infrastructure, and supporting services to deliver sustainable, self-contained communities.
- 5.4.5 A key aim of the HGGT is to balance housing delivery with employment growth, ensuring a broadly balanced number of working residents and jobs. The HGGT sets out the delivery of approximately 1,000 jobs per annum over the next two decades³⁷, alongside modern, high-quality floorspace. Growth is anticipated across a range of sectors: health, life sciences, technology and advanced manufacturing, arts, culture and creativity, construction, transport, warehousing and logistics, and green industries, alongside provision for small and medium-sized enterprises (SMEs) and office floorspace.
- 5.4.6 Within the Gilston Area, planning permission has been granted for 10,000 new homes, alongside associated infrastructure, community facilities, and green infrastructure³⁸. 34,100

<https://www.harlow.gov.uk/sites/default/files/documents/Harlow%20and%20Gilston%20Garden%20Town%20Strategic%20Economic%20Framework%202023.pdf> [Accessed: 07/04/26].

³⁷ Harlow & Gilston Garden Town (HGGT) (2025) Annual Review April 2024 to March 2025. Available at: https://hggt.co.uk/wp-content/uploads/2025/10/251020_Annual-Review-HGGT-24-25.pdf [Accessed: 07/04/26].

³⁸ Harlow & Gilston Garden Town (2025) Planning Permission Issued for Gilston. Available at: <https://hggt.co.uk/2025/01/10/planning-permission-issued-for-gilston/> [Accessed: 07/04/26].

sqm of employment floorspace is provided for in the planning permissions, with 5,100 sqm in Village 7 and 29,000 sqm distributed amongst Villages 1 to 6. 0.6ha is allocated as an Emergency Services Hub in Village 6, and each village is anticipated to provide employment and commercial floorspace relative to the scale, location and character of each village.

- 5.4.7 The East of Harlow is allocated for approximately 3,350 new homes (2,600 located within Harlow District and 750 in Epping Forest District) alongside community facilities such as education centres. In January 2025, the Government confirmed that a new Princess Alexandra Hospital NHS Trust will begin construction within the next ten years. Land is identified for this purpose at the north of the site, within the sub-area in Epping Forest.
- 5.4.8 The scale and distribution of employment land within the HGGT reflects the overarching objective of creating a 'balanced community', whereby employment provision is aligned with the resident workforce to minimise long-distance commuting. Employment requirements have been derived from projected sectoral growth and translated into land and floorspace requirements using standard employment densities and plot ratios.
- 5.4.9 Sawbridgeworth currently comprises a limited stock of employment floorspace, much of which is older in nature and smaller in size, with constrained opportunities for new development due to Sawbridgeworth's location within the Green Belt and the historic significance of the town centre, including the presence of a Conservation Area. Given Sawbridgeworth's proximity to HGGT, and the fact that outward commuter flows exceed inward flows, the town is likely to be functionally linked to the HGGT, particularly in terms of labour market relationships. It is anticipated that residents of Sawbridgeworth could access employment opportunities generated within the HGGT, potentially reducing pressure for employment land provision within Sawbridgeworth.

Minimum Energy Efficiency Standards

- 5.4.10 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 between 17% and 31%^{39,40} of national emissions.
- 5.4.11 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.
- 5.4.12 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^{41,42}, including that

³⁹ This figure includes only emissions from direct energy use in buildings.

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

⁴⁰ Additional exemptions to the new regulations are set out by RICS at <https://www3.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.

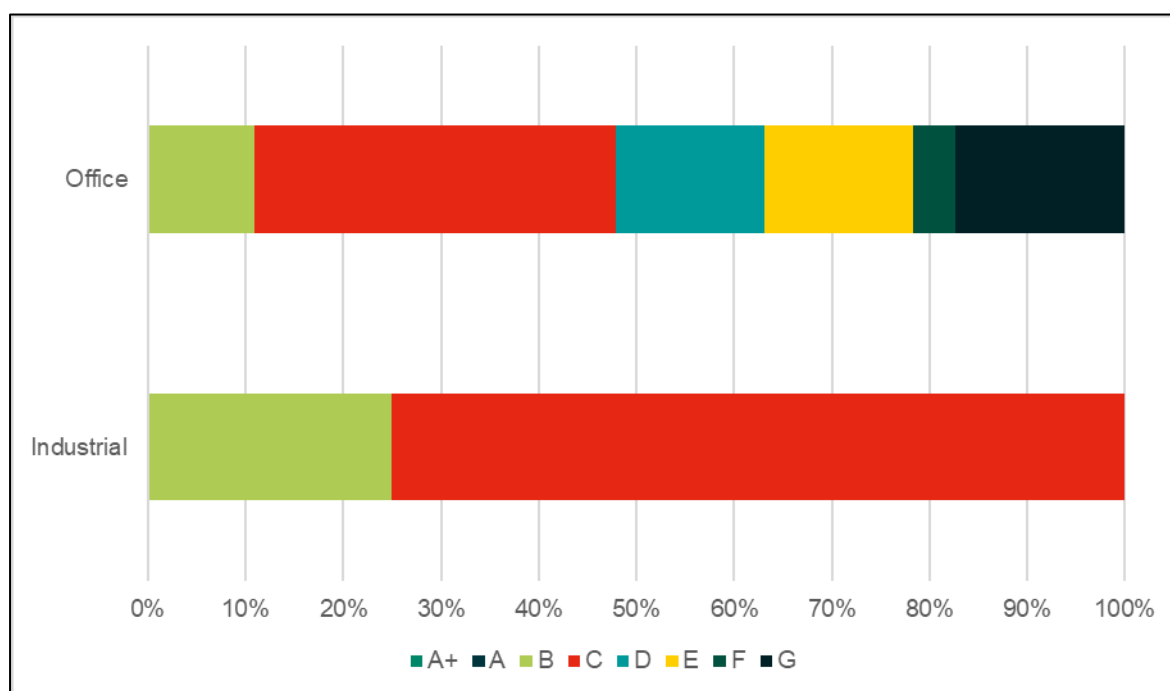
⁴¹ <https://www.gov.uk/energy-performance-certificate-commercial-property/exemptions>

⁴² Additional exemptions to the new regulations are set out by RICS at <https://www3.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.

improvements must be 'permissible', 'appropriate' and 'cost effective'⁴³. As of 1st April 2023, MEES apply to existing leases, not solely new leases as had been the case previously⁴⁴.

- 5.4.13 A breakdown of the EPC certificates awarded by use type⁴⁵ in Sawbridgeworth is shown in Figure 5-9. Only 10.9% of office certificates in Sawbridgeworth have an EPC rating of A+ to B, lower than the stock of industrial certificates (25.0%). However, it should be noted that the Department for Levelling Up, Housing & Communities only identified four industrial properties in Sawbridgeworth, compared to 46 office properties. None in Sawbridgeworth are considered to achieve Net Zero carbon emissions (A+ rating).

Figure 5-9 EPC certificates in Sawbridgeworth by building use type



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

- 5.4.14 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 commitments⁴⁶, 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 5-10 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.
- 5.4.15 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

⁴³ RICS, (2018); Minimum Energy Efficiency Standards (MEES): Impact on UK property management and valuation.

⁴⁴ <https://www3.rics.org/uk/en/journals/property-journal/epc-requirements-commercial-property.html>

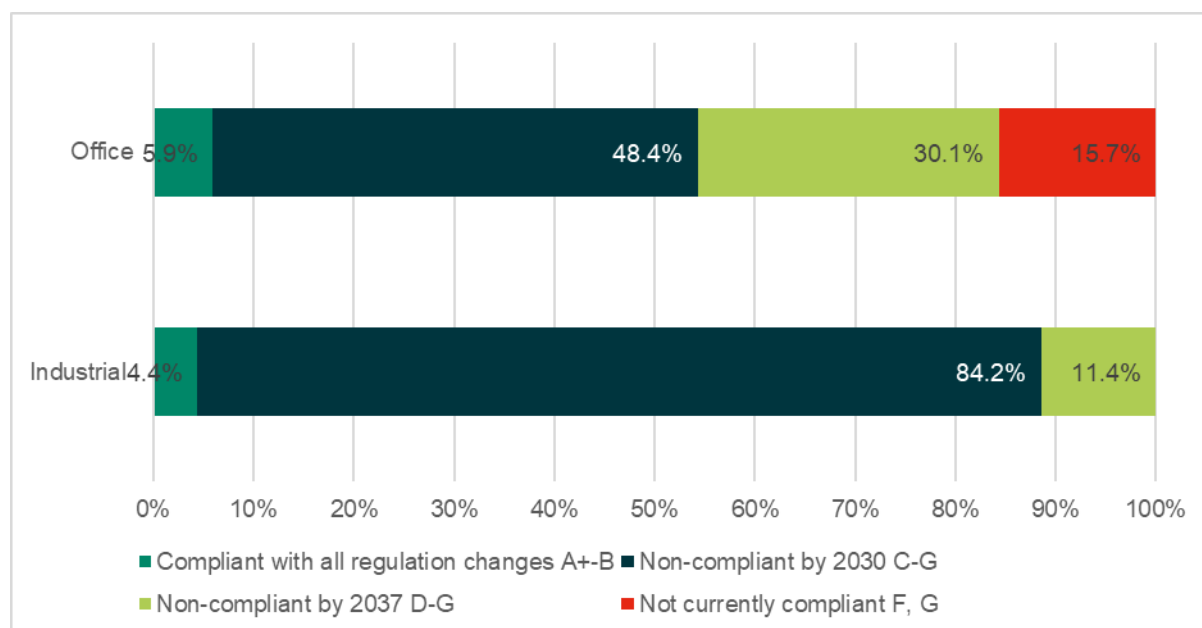
⁴⁵ It should be noted that the use types employed by MHCLG to categorise buildings do not directly align with those categories applicable to CoStar data presented in the property market analysis section of the report. Data is therefore presented by considering the broad use types shown to comprise buildings categorised by MHCLG as follows:

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

⁴⁶ HM Government, (2020); Energy White Paper: Powering our Net Zero Future.

Sawbridgeworth that fall within the scope of tightening regulations to 2030 is 45, reflecting 90.9% of floorspace⁴⁷.

Figure 5-10 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.

- 5.4.16 This potential regulatory shift presents both challenges and opportunities for the local property market in Sawbridgeworth, 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, though it should be reflected that the overall size of the market is small and in absolute terms the impact would therefore be relatively limited.
- 5.4.17 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.
- 5.4.18 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 understood⁴⁸⁴⁹.

Changing office workspace requirements

- 5.4.19 This sub-section delves into the recent evolution of changing space requirements for office and knowledge work.
- 5.4.20 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 Statistics⁵⁰ highlighted that 44% of workers in the

⁴⁷ 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, 50, is therefore greatly higher than the number of building records in CoStar i.e. 29 office and industrial premises.

⁴⁸ 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.

⁴⁹ Department for Energy Security and Net Zero (2024). Improving the Energy Performance of Privately Rented Homes: Consultation.

⁵⁰ ONS (2023) Characteristics of homeworkers, Great Britain: September 2022 to January 2023.

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 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.

- 5.4.21 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 2026⁵¹ 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.
- 5.4.22 The changing dynamics in the office market have been reflected in East Herts, with emergence of office hubs such as Launchpad⁵² 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.
- 5.4.23 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 quality⁵³”.
- 5.4.24 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.

⁵¹ 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].

⁵² [Launchpad Business Centres | East Herts District Council](#)

⁵³ 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 Clusters

6.1 Introduction

6.1.1 The East Herts District Plan does not designate any employment sites within Sawbridgeworth. However, a number of clusters of employment floorspace are present within the study area, including the following:

- The Maltings;
- Riverside Business Park;
- London Road, Spellbrook;
- Clarklands Industrial Estate; and
- Spellbrook Lane West (Toro UK Ltd)

6.1.2 In addition, a short profile on Sawbridgeworth town centre is also included, due to its role in accommodating office uses.

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

6.2 Employment areas

The Maltings

6.2.1 The Maltings comprises an area of approximately 1.8 ha, located directly south of Sawbridgeworth Railway Station, accessed via Station Road. Whilst the site adjoins the built-up area of Sawbridgeworth, it is located within the administrative boundary of Epping Forest. The site is allocated as an employment site in Epping Forest Local Plan. The site accommodates a mix of industrial, office, and retail uses across 4 properties, totalling 11,539 sqm of floorspace. Properties vary in size from 87 sqm to 6,401 sqm.

6.2.2 The site is bordered by Station Road to the north, the railway line to the east, the River Stort to the west, and residential development to the south.

6.2.3 The Maltings provides flexible employment floorspace supporting a variety of occupiers, including offices for professional and business services, suppliers, shops and retail, a café, and leisure-related uses such as an arcade club.

6.2.4 Table 6-1 provides an overview of The Maltings.

Table 6-1 Overview of The Maltings

Number of properties	Property types	CoStar Quality Rating	Office rent (£/sqm)	Industrial rent (£/sqm)	Vacancy rate (%)	Uses
4	Industrial office, retail	2-3	297.62	103.76	1.3	Professional, business services, retail, café, suppliers and wholesalers, services.

Source: CoStar (2026).

6.2.5 Buildings in the site date from 1828 to 2005 and are generally of low to average quality, as reflected in CoStar ratings, with 75% of the properties rated 2 and 25% rated 3.

6.2.6 The site benefits from strong accessibility. It is accessed via Station Road and is located adjacent to Sawbridgeworth Railway Station and within close proximity to the town centre. Road connectivity to the M11 motorway is good, located approximately 7.4 km via road through the centre of Sawbridgeworth. The site is also well-served by public transport, with bus stops associated with the Railway Station located within 100 m of the entrance providing links to the surrounding towns and villages.

- 6.2.7 The vast majority of units are occupied, however there are vacancies for small units at Herts & Essex Antiques Centre and The Maltings building for retail and industrial space respectively.
- 6.2.8 In 2025 Q4, office and industrial rents were recorded at £297.62/sqm and £103.76/sqm respectively. Office rents have increased by £16.47 / sqm over the period, from £281.15/sqm in 2014 Q1. Data on historical industrial rents is not available on CoStar. Opportunities for further development are constrained by surrounding residential uses, the railway line, and Green Belt located land to the north. It is noted that The Maltings is reflected in the Epping Forest Employment Land Supply Assessment⁵⁴.

Riverside Business Park

- 6.2.9 Riverside Business Park is a small industrial estate (2.0 ha), outside of the town settlement boundary, located north of Harlow and south of Sawbridgeworth, via Harlow Road. It comprises two properties providing a total of 3,326 sqm of industrial and retail floorspace.
- 6.2.10 The site is bordered by Harlow Road to the east, the River Stort to the south, a wooded area to the north, and greenfield land to the west.
- 6.2.11 Riverside Business Park comprises two similarly sized properties (1,620 sqm and 1,706 sqm), accommodating a range of local businesses including a fitness centre, mechanic, car dealer, vehicle repair services, and retail uses.
- 6.2.12 Table 6-2 provides an overview of Riverside Business Park.

Table 6-2 Overview of Riverside Business Park

Number of properties	Property types	CoStar Quality Rating	Industrial rent (£/sqm)	Vacancy rate (%)	Uses
2	Industrial, retail	2	145.53	0.0	Fitness centres, mechanic, car dealer, vehicle repair shop, retail.

Source: CoStar (2026).

- 6.2.13 Riverside Business Park is of low to average quality, with both properties rated 2, and was built in 1951 and 1985.
- 6.2.14 The site benefits from good transport links, accessed via A1184 Cambridge Road and located in close proximity to Harlow Mill Railway Station, which provides direct services to London Liverpool Street, Stratford, Bishop's Stortford, and Cambridge. The site also benefits from its connectivity to the M11 motorway, located approximately 4.3 km via road. Pedestrian access is available via pavements to the site entrance, although there is no internal walking infrastructure.
- 6.2.15 Vacancy in Riverside Business Park has remained consistently low, with a vacancy rate of 0.0% in 2025 Q4. This reflects a long-term trend since 2014, aside from a short-term increase to 6.6% in 2025 Q1, likely reflecting normal occupier turnover.
- 6.2.16 In 2025 Q4, industrial rents were recorded at £145.33/sqm and have increased from £53.01/sqm in 2014 Q1. The potential for further development is constrained by the site's location within the Green Belt.

London Road, Spellbrook

- 6.2.17 The London Road, Spellbrook employment cluster extends to approximately 0.8 ha and is located to the north of Sawbridgeworth, north of the village Spellbrook, and accessed via the A1184 London Road. The site accommodates industrial floorspace across two properties totalling 1,161 sqm.

⁵⁴ Epping Forest District Council (2017) Epping Forest District Local Plan Employment Land Supply Assessment. Available at: <https://www.eppingforestdc.gov.uk/app/uploads/2024/02/EB602-Employment-Land-Supply-Assessment-Arup-2017.pdf> [Accessed: May 2026].

- 6.2.18 The site is bordered by the A1184 Cambridge Road to the west, the railway line to the east, residential development to the north, and wooded land to the south.
- 6.2.19 The two properties (46 sqm and 1,115 sqm) accommodate uses including a car dealership (which has since been vacated), vehicle hire service, and a car wash.
- 6.2.20 Table 6-3 provides an overview of London Road, Spellbrook.

Table 6-3 Overview of London Road, Spellbrook

Number of properties	Property types	CoStar Quality Rating	Industrial rent (£/sqm)	Vacancy rate (%)	Uses
2	Industrial, specialty	2-3	143.91	93.4	Car dealership, vehicle hire service, and car wash (specialty).

Source: CoStar (2026).

- 6.2.21 Buildings in London Road, Spellbrook date from 1980 and 2000 and are of low to medium quality, as reflected in CoStar ratings of 2 and 3.
- 6.2.22 The site benefits from direct access to the A1184 London Road and good connectivity to the M11 motorway, located approximately 10 km away via road.
- 6.2.23 Vacancy increased significantly to 93.4% in 2025 Q4, following a sustained period of full occupancy between 2014 Q1 and 2025 Q1. This sharp rise is attributable to the vacating of warehousing floorspace at the site's largest property.
- 6.2.24 In 2025 Q4, industrial rents were recorded at £143.91/sqm, with no data available prior to 2025 Q2. Opportunities for development are limited given the site's location on Green Belt land.

Clarklands Industrial Estate

- 6.2.25 Clarklands Industrial Estate is a small (0.6ha) site, outside the town settlement boundary, located on Parsonage Lane, to the north of Sawbridgeworth.
- 6.2.26 The site provides one office property, constructed in 1971, currently occupied by a scientific equipment supplier and other sui generis uses in the form of a car dealership and motor repairs company.
- 6.2.27 Table 6-4 provides an overview of Clarklands Industrial Estate.

Table 6-4 Overview of Clarklands Industrial Estate

Number of properties	Property types	CoStar Quality Rating	Office rent (£/sqm)	Vacancy rate (%)	Uses
3	Office; sui generis	2	-	-	Professional, technical and scientific; car dealership; motor repairs

Source: CoStar (2026).

- 6.2.28 The site provides indirect access to the A1184 via Parsonage Lane. Surrounding uses are predominantly agricultural, though there are some sensitive receptors in proximity to the site including a soft play centre and residential to the west.

Spellbrook Lane West (Toro UK Ltd)

- 6.2.29 Spellbrook Lane West is a sole occupier site, located to the west of Spellbrook, north of Sawbridgeworth, accommodating the headquarters of Toro UK Ltd, a lawnmower manufacturing company.
- 6.2.30 The manufacturing facility was built in 1970 and provides c. 14,000 sqm of floorspace of average quality (CoStar Rating 3).

6.2.31 Table 6-5 provides an overview of Spellbrook Lane West (Toro UK Ltd).

Table 6-5 Overview of Spellbrook Lane West (Toro UK Ltd)

Number of properties	Property types	CoStar Quality Rating	Industrial rent (£/sqm)	Vacancy rate (%)	Uses
1	Manufacturing	3	-	-	Lawnmower manufacturing facility

Source: CoStar (2026).

6.2.32 The site provides indirect access to the A1184 via Spellbrook Lane West in a predominantly rural setting, with some residential uses in close proximity to the north and east of the site. Otherwise, the surrounding area is in greenfield/agricultural use.

Overview

6.2.33 The five identified employment clusters are relatively small in scale and primarily support local businesses across a mix of office, industrial, retail and sui generis uses. While the building stock is generally older and of low to moderate quality, vacancy levels are typically low, indicating the space is meeting needs locally. Opportunities for intensification or expansion are limited across most sites due to high levels of occupancy, site constraints, and proximity to surrounding uses, including residential areas and, in several cases, Green Belt land.

6.3 Sawbridgeworth Town Centre

6.3.1 Sawbridgeworth town centre plays an important role in providing office floorspace both locally and across East Herts. Centred on Bell Street, it benefits from proximity to Sawbridgeworth Railway Station, which provides direct services to London Liverpool Street, Stratford, Bishop's Stortford, and Cambridge. The town centre also benefits from good strategic road connectivity via the M11 motorway, A10, and A1184, while the town centre also provides workers with access to a range of local amenities which are key attractors for office occupiers.

6.3.2 The town centre provides a modest supply of office floorspace, comprising 10 properties totalling 1,553 sqm of floorspace, as outlined in Table 6-6. Properties range in size from 52 sqm to 214 sqm, and are of low quality as per CoStar ratings.

Table 6-6 Overview of Sawbridgeworth Town Centre

Number of properties	Property types	CoStar Quality Rating	Office rent (£/sqm)	Vacancy rate (%)	Uses
10	Office	1-2	159.30*	0.0	Professional, business services, financial services, real estate.

Source: CoStar (2026).

Note: Market rent data for 2025 Q4 was not available on CoStar. The latest available data was used (2023 Q3).

6.3.3 Office stock in Sawbridgeworth town centre is generally old, with all properties (where construction dates are known) built in or before 1995 and most before 1960. Much of the town centre lies within a Conservation Area, and many of the buildings are listed for their historic significance, dating from the Tudor, Stuart, and Georgian periods⁵⁵. Therefore, purpose-built office floorspace is limited, with a high proportion of floorspace arising from conversions, including offices located above retail units.

6.3.4 The most recent available data indicates an office market rent of £159.30/sqm in 2023 Q3. This represents a notable decline from a peak of £203.41/sqm in 2019 Q4, but an overall increase from £119.44/sqm in 2014 Q1. Vacancy rates have fluctuated across the period but have remained at 0.0% since 2022 Q4.

⁵⁵ East Herts District Council (2018) East Herts District Plan. Available at: https://cdn-eastherts.onwebcurl.com/s3fs-public/documents/District_Plan_Publish_web_view.pdf [Accessed: 29/04/26].

- 6.3.5 There has been no recorded delivery of new office floorspace since 2005 Q1 (the earliest available CoStar data), and no recorded losses through demolition over this period.

7. Conclusions and Recommendations

7.1 Introduction

- 7.1.1 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 Sawbridgeworth.
- 7.1.2 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 Sawbridgeworth?
 - What sort of jobs could be attracted or developed in Sawbridgeworth?
 - What actions need to be taken to achieve the desired Sawbridgeworth?

7.2 Is it desirable to increase the number of jobs in Sawbridgeworth?

- 7.2.1 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 to minimise the number and length of journeys needed for employment, shopping, leisure, education and other activities.
- 7.2.2 The current housing trajectory, taking account of committed dwellings with planning permission, suggests the potential for 184 new homes to be delivered in Sawbridgeworth through the District Plan allocation SAWB4. With an average household size of 2.37 in East Herts⁵⁶, this indicatively suggests the potential for 436 additional residents, of which 270 would be expected to be aged 16 and over and economically active. It is important to ensure that residential growth is balanced with an appropriate quantum of employment land to support opportunities for local residents.
- 7.2.3 However, the growth context in Sawbridgeworth is relatively modest. Population growth between 2015 and 2024 was limited (696 additional residents), while the total number of economically active residents fell by between 2011 and 2021, given the growth in the retired population. This demographic profile indicates that while increasing local employment opportunities is desirable, the scale of growth pressure is not significant.
- 7.2.4 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 particularly relevant in the Sawbridgeworth context, given the proximity to larger towns such as Bishop's Stortford, Harlow, and Hertford, as well as direct connections to London and Cambridge, and the range of high value opportunities these markets offer.
- 7.2.5 As such, there is no certainty that an increase in the number of jobs located in Sawbridgeworth will reduce the level of out-commuting set out in Section 4.5, with commuter outflows (3,094) exceeding the number of inflows (2,002) at the time of the 2011 Census. Workers will be drawn to elsewhere in the district, and key commuting locations such as Harlow, Uttlesford and Epping Forest.
- 7.2.6 Moreover, it is important to recognise that wider commercial development in competing locations may satisfy some demand from the resident population in Sawbridgeworth. Conversations with agents reflected views that demand was satisfied in larger centres

⁵⁶ ONS (2022) Census (2021) Household size, local authorities in England and Wales,

nearby such as Bishop's Stortford to the north and, to a greater extent, Harlow a 5 minute drive to the south. There were concerns that additional employment development could increase pressure on the A1184, which already suffers from congestion and slow journey times, while the availability of suitable land to support employment development given Sawbridgeworth's location within the Green Belt, the historic significance of the town centre, and the presence of a Conservation Area, was also questioned. Furthermore, HGGT is expected to accommodate an additional 45,000 residents by 2045, requiring the creation of an additional 23,000 jobs to support a balanced labour market. Despite aims to support sustainable, self-contained communities, it is likely that this employment provision will be accessible to Sawbridgeworth residents given the close proximity and the labour market relationships outlined above, reducing pressure for local employment growth.

- 7.2.7 Should the provision of employment space fail to keep up with growth in the working age population in Sawbridgeworth, there will inevitably be an increase in outward-commuting, notwithstanding the increase in home working that has resulted from the Covid-19 pandemic. However, outward commuting in Sawbridgeworth is already significant and will have been for long time period. On balance, modest population growth allied with constraints facing the town, suggest that future employment growth would be more readily accommodated in larger centres and HGGT.
- 7.2.8 Supporting local employment opportunities remains desirable, with the scale of provision reflecting the town's limited growth trajectory and the availability of employment in nearby centres. Without sufficient local employment provision, there is a risk that Sawbridgeworth increasingly functions as a predominantly residential settlement with growing levels of outward commuting, placing additional pressure on transport networks and undermining wider sustainability objectives. However, this growth is likely to be met through infill development and the refurbishment /redevelopment of existing sites, rather than through additional employment land.

7.3 What sort of jobs could be attracted or developed in Sawbridgeworth?

Office

- 7.3.1 Sawbridgeworth represents a small share of the East Herts office market, accounting for 5.8% of office properties and 2.6% of the floorspace.
- 7.3.2 The analysis has demonstrated that vacancy levels have displayed a relatively steady trend from 2014 Q1 to 2025 Q4, averaging at 3.0% over this period (where data is available), below the generally accepted "frictional" vacancy rate of between 5-8% which indicates a market in balance.
- 7.3.3 Sawbridgeworth attracts slightly 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.
- 7.3.4 Feedback from agents reflected that Sawbridgeworth was home to a small and relatively limited office market. Demand for office floorspace is driven by the ability to access a high amenity small town location and proximity to the railway station. However, while existing office space is generally well occupied overall, demand for additional/larger office space was identified as limited and better suited to the larger centres in the district, given post Covid-19 trends in office occupancy. As set out in Section 5.4, the emerging HGGT is expected to provide office floorspace over a range of sectors, including provision for SMEs, and therefore may accommodate some local demand.
- 7.3.5 Future demand would be expected to align with the current structure of the economy, focusing on microbusinesses and Small and Medium-sized Enterprises in local professional services such as lawyers, accountants, architects and financial advisors.

Industrial

- 7.3.6 Sawbridgeworth represents a small share of the East Herts industrial market, comprising six industrial properties, accounting for 2.6% of office properties and 3.9% of the floorspace.
- 7.3.7 The vacancy rate for industrial uses at 6.1%, indicates some spare capacity in the local market and is in line with the frictional level, while market rents are above district, regional and national averages. However, given the very small market size, these indicators are subject to volatility and should be considered with caution.
- 7.3.8 Constraints in relation to the availability of land and challenges associated with congestion on the A1184 limit the potential for new industrial development in Sawbridgeworth, with more pressing need identified in Bishop's Stortford and Hertford and Ware and availability of stock in competing locations outside the District such as Harlow. Future growth, were it to be accommodated, would likely focus on prominent sectors such as construction and manufacturing, as set out in Section 4.3.

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

- 7.4.1 This Study has identified that the employment land market in Sawbridgeworth is small, with no designated employment sites within the District Plan. Given this context, the Council should consider safeguarding existing sites set out in Section 6, where possible, thereby maximising their contribution to local economic development and resilience. 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.
- 7.4.2 While limited demand for additional employment land to support office and industrial development was identified, the Council should look to ensure existing stock remains fit for purpose. There may be opportunities to support the refurbishment/renovation of sites or to accommodate infill development, given the age and quality profile of stock and sites identified in sections 5 and 6 of this report. However, this will need to be considered in relation to the site-specific characteristics, and the feasibility/compatibility with neighbouring uses.
- 7.4.3 It is recommended that the Council continues to regularly monitor changes employment space to identify evolving occupier/developer patterns and inform any policy responses that will be required.
- 7.4.4 In line with recommendations in relation to Bishop's Stortford and Hertford and Ware, the Council should review the opportunities to work with landlords and occupiers to improve office properties in Sawbridgeworth town centre to reduce the potential risk of some properties becoming non-compliant with minimum energy efficiency standards. However, MEES compliance is less significant in Sawbridgeworth, in comparison to other locations such as Bishop's Stortford and Hertford and Ware. This could be through 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 tenure⁵⁷.

7.4.5 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 Sawbridgeworth 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 limited requirement for additional employment land in Sawbridgeworth to meet demand. However, 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;
- 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.

7.4.6 The Conclusions and Recommendations of this Study are summarised in Table 7-1 below.

Table 7-1 Conclusions and Recommendations

Topic	Conclusion/Recommendation
Is it desirable to increase the number of jobs in Sawbridgeworth?	• The analysis has highlighted the growth context in Sawbridgeworth is relatively modest. Population growth between 2015 and 2024 was limited (696 additional residents), while the total number of economically active residents fell between 2011 and 2021. The current housing trajectory, taking account of the District Plan allocation (SAWB4) with planning permission, suggests the potential for 184 new homes to be delivered in Sawbridgeworth. With an average household size of 2.37 in East Herts⁵⁸, this indicatively suggests the potential for 436 additional residents, of which 270 would be expected to be aged 16 and over and economically active. • Wider commercial development in competing locations may satisfy some demand from the resident population in Sawbridgeworth. Conversations with agents reflected views that employment demand was satisfied in larger centres nearby such as Bishop's Stortford and Harlow, while future proposals at HGGT could present accessible opportunities for Sawbridgeworth residents. • Additional employment development could increase pressure on the A1184, which already suffers from congestion which slows journey times, while the availability of suitable land to support employment development is limited. • On balance, muted demand, modest population growth and constraints facing the town (including its location within the Green Belt, the historic significance of the town centre and congestion on London Road), suggest that additional employment land would be more readily accommodated in larger centres within East Herts and HGGT. • Supporting local employment opportunities remains desirable. Without sufficient local employment provision, there is a risk that Sawbridgeworth increasingly functions as a predominantly residential settlement with growing levels of outward commuting, placing additional pressure on

⁵⁷ 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.

⁵⁸ ONS (2022) Census (2021) Household size, local authorities in England and Wales,

transport networks and undermining wider sustainability objectives. However, this growth is likely to be met through infill development and the refurbishment /redevelopment of existing sites, rather than through additional employment land.

What sort of jobs could be attracted or developed in Sawbridgeworth? Why?	• Future demand in office related sectors would be expected to align with the current structure of the economy, focusing on microbusinesses and SMEs in local professional services such as lawyers, accountants, architects and financial advisors. • Future industrial growth, were it to be accommodated, would likely focus on prominent sectors such as construction and manufacturing, as set out in Section 4.3. • Conditions to harness opportunities related to AI and data centre development could be realised if appropriate sites exist, though the availability of sufficient land to accommodate occupiers whose requirements are typically for large sites, would suggest there is limited potential for this in Sawbridgeworth.
What actions need to be taken to achieve the desired outcomes?	• The Council should consider safeguarding existing sites set out in Section 6 where possible, thereby maximising their contribution to local economic development. • While limited demand for additional employment land to support office and industrial development was identified, the Council should look to ensure existing stock remains fit for purpose. There may be opportunities to support the refurbishment/renovation of sites or to accommodate infill development, given the age and quality profile of stock and sites identified in Sections 5 and 6 of this report. However, this will need to be considered in relation to the site-specific characteristics, and the feasibility/compatibility with neighbouring uses. • 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 Sawbridgeworth town centre, though noting a limited number of EPC certificates potentially fall 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.