Economic and Employment Needs Assessment Addendum

Huntingdonshire District Council

August 2026

Contents

1. Introduction

1.1 Volterra Partners LLP ('Volterra') has been commissioned by Huntingdonshire District Council ('HDC') to produce a suite of addendum evidence in support of their Local Plan Review. Volterra originally prepared the Economic and Employment Assessment ('EENA') between 2024 and 2025. In the interim, HDC has received a range of responses as part of the Regulation 18 stage of their Local Plan development including some with respect to the findings of the EENA.

Role and purpose of the EENA Addendum

1.2 This EENA Addendum report is prepared to provide supplementary economic and employment evidence for Huntingdonshire and to inform the preparation of HDC's forthcoming employment topic paper. The EENA Addendum serves the purposes of:

- Summarising the economic growth agenda and key strategic priorities for HDC, particularly how this has evolved since the production of the 2025 EENA;
- Clarifying and justifying the overarching approach to the EENA (its scope, purpose, role in establishing future employment needs, and how the evidence-based preferred scenario was selected);
- Providing additional economic evidence where required due to time elapsed and/or room for clarification of evidence previously presented;
- Testing/confirming the findings of the preferred scenario with respect to the latest housing capacity information and how this affects the overall assessment results;
- Advising on the broad principles of bringing forward (a mix and quantum of) employment uses as part of mixed-use strategic sites drawing on precedent studies and best practice.

1.3 The results presented with respect to the preferred scenario supersede those in the original EENA and should therefore be treated as the ultimate results of the economic and employment evidence.

Local Plan programme

1.4 HDC is preparing a full update to its adopted Local Plan that was adopted in May 2019.[1] The emerging plan, referred to as the Local Plan to 2046, will guide development across the district to 2046 and once adopted, will replace the current Local Plan in full. The emerging plan is currently at the Regulation 18 stage of preparation having progressed through a number of consultation stages, including Issues and Options, Further Issues and Options and Preferred Options consultations; further consultation on additional preferred sites was completed in June 2026. Throughout this process, HDC has continued to refine the strategy, site allocations and policy approach in response to evidence and stakeholder feedback.[2]

1.5 As set out in HDC's Local Development Scheme (May 2026), the Council intends to publish the pre-submission Local Plan under Regulations 19 and 20 in September 2026, with submission to the Secretary of State (Regulation 22) anticipated in December 2026. Subject to the examination process, the Planning Inspector's programme and outcome of the Examination in Public, adoption is currently anticipated in early 2028.[3]

[1] HDC, 2019. Huntingdonshire's Local Plan to 2036

[2] HDC, 2026. Evidence Library for Local Plan Update

[3] HDC, 2026. Local Development Scheme 2027

Structure of the report

1.6 The remainder of the report is structured around the following sections:

- **Section 2 Review of the EENA**: sets out the need, purpose, approach and findings of the 2025 EENA;
- **Section 3 Economic growth in Huntingdonshire**: considers how (developments in) Huntingdonshire's economic growth context and strategic priorities are consistent with the findings of the EENA;
- **Section 4 Sensitivity of the findings of the EENA to different housing targets**: provides an update to Huntingdonshire's overall need for employment floorspace and land based on the revised Standard Method for housing need;
- **Section 5 Gap analysis**: presents a numerical assessment of the relationship between identified need and available supply, including pipeline supply;
- **Section 6 Strategic sites**: provides an overview of potential principles of planning for employment uses on some of Huntingdonshire's strategic sites;
- **Section 7 Conclusion and recommendations:** presents recommendations, where different to those presented in the original EENA, synthesising the information of previous sections.

2. Review of the EENA

The need for the EENA

2.1 Volterra was initially commissioned by HDC to prepare the 2025 EENA to inform the earlier stages of the review of the Local Plan to 2046. The assessment was prepared in order to respond to the requirement for local planning authorities to understand existing and future business needs, and to ensure that an appropriate amount of employment land is identified and safeguarded over the Plan period.[4]

2.2 The EENA considered how the amount and types of employment in the district are likely to change between 2025 and 2046, making recommendations on the quantum and type of employment floorspace and land that should be planned for. It is one part of a wider evidence base. It sits alongside, and is intended to be read in conjunction with, HDC's housing need evidence and other evidence base documents.[5]

Scope and purpose of the EENA

2.3 The 2025 EENA was an assessment of need for employment-generating floorspace and land in Huntingdonshire. Its purpose was to establish how much land and floorspace of particular types the district should, as a minimum, plan for. It drew together policy and economic context, labour market and socio-economic analysis, a property market assessment, a site supply assessment, an appraisal of infrastructure impacts, and quantitative demand modelling.

2.4 The Local Plan should then demonstrate that this need is met by setting out a supply of allocated and safeguarded employment land which is sufficient to accommodate the net requirement, informed in part by the EENA's own supply assessment of existing and potential future sites, and by the pipeline of committed development. The EENA's role is to quantify and characterise the need; the means of meeting it is for HDC to determine through the Plan. The need figures established in the EENA, and the allocations made in response to them, represent the minimum requirement to address identified demand. They are not a ceiling on economic growth and the Local Plan does not prevent more ambitious levels of provision from coming forward. The EENA and this addendum corroborate a conservatively ambitious approach with regard to the local economy transforming and adapting to new modern sectors. The approach is necessarily realistic and it is the role of other studies/documents to test wholesale reconfiguration of land uses.

2.5 The assessment deliberately focused on a defined set of employment uses and did not attempt to quantify need for every economic land use that generates jobs. The uses that were 'scoped in' to the assessment aligned with the broad uses described in planning practice guidance ('PPG'):[6]

- Office – [E(g)(i)];
- Research and development – [E(g)(ii)];
- Light industrial – [E(g)(iii)];
- General industrial – [B2]; and
- Storage and distribution – [B8].

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[4] Ministry of Housing, Communities and Local Government, 2025. Planning practice guidance: Housing and economic needs assessment.

[5] HDC, 2026. Evidence Library for Local Plan Update. Accessed: https://www.huntingdonshire.gov.uk/planning/local-plan-update/evidence-library-for-local-plan-update/

[6] Ministry of Housing, Communities and Local Government, 2025. Planning practice guidance: Housing and economic needs assessment.

2.6 Other economic land uses, such as leisure, entertainment and retail, were accordingly not included in the scope of the 2025 EENA.

2.7 Employment evidence base studies of the nature of the 2025 EENA present a snapshot in time; they inherently take into account data/information at the time of preparation and do not provide a live picture of need. Over the course of the Local Plan period, it is essential to monitor and review available evidence to provide an updated assessment of employment needs as they evolve over time. The EENA recognised and accounted for this uncertainty by running different scenarios and taking a range of methodological approaches including sensitivity testing in order to triangulate the best possible result.

Approach to the EENA

2.8 The 2025 EENA methodology was structured to align with various PPG, namely 'Housing and economic needs assessment'[7], 'Plan-making'[8] and 'Making effective use of land'.[9]

2.9 The PPG expects local authorities to assess future economic needs using a variety of forecasting techniques to build a triangulated, comprehensive picture. In full compliance with this, the 2025 EENA tested future need using three core scenarios:

- **Scenario 1a – Labour demand**: builds on employment forecasts produced by Oxford Economics and considers what space would be required to support the anticipated change in the employment profile across relevant sectors.
- **Scenario 2a – Labour supply:** estimates the amount of employment (and resulting space) that would be required to support the population growth anticipated over the Plan period, aligning with inputs to HDC's housing needs assessment. The sectoral distribution of jobs in Scenario 2a is aligned with those sectors which are expected to be growing and shrinking within the labour demand (1a) scenario.
- **Scenario 3a – Past take-up:** extrapolates historic rates of commercial property leasing and development activity as a proxy for future market demand.

2.10 Each of these core approaches in some way projects forward past trends. The 2025 EENA recognised that this carries a risk: if forecasts simply continue historical trends, they can 'bake in' the conditions of the past and understate the potential for change, particularly in sectors such as manufacturing and logistics where improvements in productivity through automation and industrial innovation could change the prevailing fate of the sector.

2.11 Due to the recognised limitation around potentially 'baking in' past trends, the 2025 EENA also tested three additional scenarios that adjusted the core inputs to reflect alternative, plausible futures, based on market signals. This was done in line with Paragraph 027 of the applicable PPG, which asks plan-makers to take account of longer-term economic cycles and to consider and plan for the implications of alternative economic scenarios based on specific sectoral requirements. The three additional scenarios (1b, 2b and 2c) are presented below:

- **Scenario 1b – Labour demand (aspirational):** adapts the inputs to the labour demand scenario with respect to employment in sectors (manufacturing, and transportation and storage) which more recent local market signals contrastingly suggest are performing better than long term national trends.

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[7] Ministry of Housing, Communities and Local Government, 2025. Planning practice guidance: Housing and economic needs assessment.

[8] Ministry of Housing Communities and Local Government, 2025. Planning practice guidance Plan-making.

[9] Ministry of Housing Communities and Local Government, 2025. Planning practice guidance. Making effective use of land.

- **Scenario 2b** – **Labour supply (apportionment by current residence-based employment)**: the additional future labour supply is apportioned to sectors reflecting the sectors that Huntingdonshire residents are currently employed in, assuming this split remains constant over the Plan period.
- **Scenario 2c – Labour supply (apportionment by future residence-based employment):** the additional future labour supply is apportioned to sectors according to what the trends in residence-based employment by sector would suggest the future split could be in 2046.

2.12 In Huntingdonshire, a number of market signals were identified that supported testing an alternative view of future need, particularly for industrial and logistics space per the Scenario 1b approach. These signals included persistently low vacancy rates over the preceding decade and low average take-up rates despite direct evidence from landowners, agents and developers indicating that demand has not been met with new supply. Other conditions that warrant this approach include recent infrastructure improvements such as the A14 scheme and limited space for growth in neighbouring areas. The 2025 EENA treated the future of manufacturing, and transport and storage as a key uncertainty and interrogated it directly, comparing Huntingdonshire's recent performance with that of neighbouring authorities before adjusting the forecasts. Testing these alternatives allowed the assessment to show how need would differ if the underpinning forecasts better reflected recent market signals (employment growth, strong demand relating to new enabling infrastructure).

2.13 Each scenario tested in Chapter 12 of the EENA took into account existing vacant floorspace, an appropriate level of frictional vacancy and the replacement of floorspace expected to be lost over the plan period to provide a net requirement over the Plan period.

Preferred scenario

2.14 After sense-checking each scenario against what Huntingdonshire has actually delivered in recent years, the EENA arrived at its preferred scenario. On this basis, the assessment concluded that **Scenario 2b** provides the most realistic and balanced foundation for *most* types of employment space, because it implied keeping jobs and homes growing in step and aligned well with what has been delivered across office, research and development, and industrial uses. For storage and distribution, however, evidence pointed towards the higher aspirational **Scenario 1b** given strong recent delivery, major infrastructure improvements and regional connectivity.

2.15 The preferred scenario was therefore a considered, blended position rather than a single scenario adopted. It carried the results of Scenario 2b for all employment uses except storage and distribution, where Scenario 1b was favoured instead. This produced a recommended target of approximately 922,000 sqm of employment floorspace, equivalent to approximately 230 hectares of employment land, over the Plan period.

2.16 This hybrid approach recognises the strengths and distinct characteristics of different parts of the local economy while supporting **a spatial strategy that is ambitious yet deliverable**. It provides a strong and evidence-based platform for aligning employment land allocations with Huntingdonshire's long term growth trajectory and aspirations. This blend results in an overall need that allows flexibility for employment to either increase in line with past trends (Scenario 2b) or allow employment to shift towards an alternative sectoral breakdown in future (Scenario 2c) given the latter implies a smaller requirement for floorspace.

2.17 The adoption of a hybrid preferred scenario is a widely applied approach in economic needs assessments. This recognises that some methodologies (i.e. either labour driven, demand and supply-side, or market signal approaches) are better than others at capturing the need for certain uses and that this differs by geography. The underpinning consistent economic logic to the hybrid preferred scenario is set out in the 2025 EENA at paragraph 16.11.

2.18 The 2025 EENA's preferred scenario equated to a change of around 14,400 full-time equivalent (FTE) jobs across the core employment uses. The breakdown by use is set out in **Table 2-1**. When interpreting these findings it is important to note:

- The total jobs figure of 14,400 refers only to those accommodated in the 'scoped in' uses (office, research and development, light industrial, general industrial and storage and distribution) **over the period of 2025 to 2046**. It is drawn from methodology highlighted in paragraph 12.15 and Figure 12.2 in the 2025 EENA.
- The total jobs figure of 14,400 in the 2025 EENA is not directly comparable to the 14,400 jobs figure in Huntingdonshire's adopted Local Plan, which is the jobs growth that the East of England Forecasting Model predicted would be associated with the housing need of 20,100 dwellings over the Plan period of 2011-2036. In other words that figure included jobs in all sectors/land uses (including no fixed place).
- The jobs total is derived from the gross need and has not been driven by market adjustments highlighted in paragraph 2.13.
- As set out in Figure 12.2 of the 2025 EENA, to convert between floorspace and land figures, plot ratios reflecting local property data have been used. It is however noted that some sites being put forward have considerably different ratios between the two metrics due to specifics such as setting aside land for landscaping/flood mitigation etc. When considering land allocation, the EENA notes that floorspace figures should be viewed as more important.

Table 2-1 – Jobs, employment floorspace and land target in the preferred scenario (rounded) presented in the 2025 EENA (2025 – 2046)

2025 EENA preferred scenario

Employment use	Change in jobs (FTEs)	Floorspace target (sqm)	Land target (ha)
Office	5,000	113,000	16.8
Research and development	300	45,900	5.6
Light industrial	1,200	106,000	22.1
General industrial	3,950	224,000	74.6
Storage and distribution	3,800	433,000	110.9
Total	**14,400**	**922,000**	**230**

Source: Huntingdonshire District Council, 2025. Economic and Employment Needs Assessment. Figures may not sum due to rounding.

3. Economic growth in Huntingdonshire

3.1 This section of the EENA Addendum provides an updated view on Huntingdonshire's key strategic economic priorities and policy landscape where they have evolved since the original EENA was prepared. The 2025 EENA was prepared in conjunction with the Economic Growth Strategy (2025).

Emerging policy direction

3.2 A number of notable policy documents have been published in the intervening period that update the context for economic growth in the district. It is indicated where the conclusions of the EENA and the recommended employment land strategy align with the direction in these documents/strategies. Those plans and policies taken into account include:

- Cambridgeshire and Peterborough Combined Authority (CPCA) Local Growth Plan (LGP), which provides regional strategic economic growth ambitions and spatial strategies like 'opportunity zones' for delivering those;[10] and
- Proposed reforms to the National Planning Policy Framework (NPPF) and other changes to the planning system.[11]

Cambridgeshire and Peterborough Combined Authority (CPCA) Local Growth Plan (LGP) and Planning and Infrastructure Act 2025

3.3 The CPCA LGP was approved by the CPCA board in October 2025. It aims to transform the region into the fastest-growing economy in the UK by 2050, setting out a core vision to **double the size of the local economy**, with an aspirational (mayoral) goal of tripling it, positioning Cambridgeshire and Peterborough as a global powerhouse for science, technology and innovation. The LGP seeks to maximise opportunities across the priority sectors of defence, advanced manufacturing and materials, life sciences, digital technologies, agri-food and tech, and energy and clean-tech. The Plan also sets out shared priorities with Government, focusing on addressing key infrastructure challenges such as energy and water capacity, improving transport connectivity and supporting quality placemaking for new homes and communities.

3.4 The LGP proposes four new 'opportunity zones' to spread growth across the area, of which one is the 'North Huntingdon Growth Cluster (NHGC)'. Broadly comprising Huntingdon and its northern hinterland, the NHGC is identified as a focus for inward investment.

The Planning and Infrastructure Act 2025 places a duty on combined authorities to prepare a Spatial Development Strategy (SDS) for their area.[12] Strategic authorities will need to produce an SDS to act as the spatial representation of the priorities outlined in each Local Growth Plan. An SDS sets out policies in respect of development and the use of land of strategic importance, and may specify infrastructure

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[10] Cambridgeshire and Peterborough Combined Authority, 2025. Get Cambridgeshire and Peterborough Growing.

[11] Ministry of Housing, Communities and Local Government, 2025. Proposed reforms to the National Planning Policy Framework and other changes to the planning system.

[12] Planning and Infrastructure Act 2025. Retrieved from https://www.legislation.gov.uk/ukpga/2025/34 [accessed August 2026].

considered necessary for facilitating development or promoting the economic, social or environmental well-being of a strategic area. It is expected that the CPCA will develop an SDS for the area, which includes Huntingdonshire, in the near future.

Proposed reforms to the Nationally Planning Policy Framework and other changes to the planning system

3.5 In December 2025, the Government initiated a further consultation on proposed reforms to the NPPF, sitting within a broader programme of reform to plan-making and explicitly linked to the Government's ambition to deliver 1.5 million new homes this parliament. The draft framework represents the most significant overhaul of national planning policy since the NPPF was first introduced in 2012, and restructures the document around a series of policies within thematic chapters, most of which are split between plan-making policies and national decision-making policies (NDMPs). In terms of economic development, the focus on delivering economic growth is to be further strengthened, following the general approach of the 2024 NPPF, with new references to the Industrial Strategy Zones Action Plan and AI Growth Zones, campus facilities and associated generating capacity for data centres.

3.6 The importance of flexibility in plan-making is emphasised, with the draft text advising that development plans are not overly prescriptive about the types of acceptable uses given changing commercial property requirements, unless there is specific justification. The development management policies (E2 and E3) are proposed to be widened for business land and premises, with **substantial weight proposed to be given to the economic benefits of commercial development, especially where this supports the economic vision and strategy of the area**.

3.7 Explicit reference is made to the importance of market signals in planning for employment land and floorspace in Draft Policy E2. A new sub-policy, E2.2, applies where a development proposal meets an unmet need (including outside a settlement boundary under Policy S5) and sets out the considerations to be given, covering market signals and locational requirements.

3.8 These changes further reinforce the need for employment land policies to respond flexibly to the requirements of modern businesses and emerging sectors.

Strategic ambitions in Huntingdonshire

3.9 Huntingdonshire has articulated its clearest strategic economic priorities in the defence and advanced manufacturing sectors, both of which are among the eight priority sectors of the UK's Modern Industrial Strategy ('IS-8'), cementing the district's ambition to continue to **contribute to national economic growth**.[13,14,15] Both sectors are also highlighted in the CPCA LGP.[16]

Defence

3.10 Huntingdonshire has an established defence heritage and presence of major assets, anchored by the continued operation of RAF Wyton and former RAF Molesworth and RAF Alconbury bases. In Huntingdonshire, Business Register and Employment Survey ('BRES') data indicates that defence sector

[13] Huntingdonshire District Council, 2025. Huntingdonshire Economic Growth Strategy 2025-2030

[14] Department for Business and Trade, 2026. The UK's Modern Industrial Strategy 2025.

[15] The eight priority sectors, known as the IS-8, in the UK's Modern Industrial Strategy 2025 are advanced manufacturing, defence, clean energy, digital and technology, creative industries, financial services, life sciences and professional and business services.

[16] Cambridgeshire and Peterborough Combined Authority, 2025. Get Cambridgeshire and Peterborough Growing.

jobs have grown by 14% between 2018 and 2023, significantly outperforming the East of England average (-1%) and the England average (+9%) over the same period.[17] The Economic Growth Strategy ('EGS') additionally reports 15 established defence companies in the district within an employee growth rate of 30% per year, and a GVA per job of approximately £111,000, placing the sector among the highest-value employment activities in the local economy.

3.11 RAF Wyton is the principal operational site, functioning as a Cyber and Specialist Operations Command Station and hosting the National Centre for Geospatial Intelligence and the NATO Joint Intelligence Centre. The site currently accommodates over 2,500 military and civilian personnel, with plans to increase this total by approximately 1,000 by 2032.[18] While these assets provide a strong institutional foundation, the commercial defence cluster that Huntingdonshire aspires to build around them is still in its early stages. The district's strategic ambition focuses on leveraging its defence infrastructure to attract and retain the supply chain, technology and innovation businesses that would give the cluster critical mass.

Project FAIRFAX and Statement of Intent

3.12 Project FAIRFAX represents the most significant planned initiative to develop and deepen the defence cluster around RAF Wyton. It sets out a vision for the Wyton Campus to accommodate a new innovation centre, a conference facility, an enhanced Defence Intelligence Engagement Team tasked with improving the interface between the operational base, industry and academia. The project is designed to consolidate RAF Wyton's position as a national intelligence and innovation hub by establishing conditions for the co-location of defence technology companies, specialist SMEs, and research institutions on or adjacent to the operational base.[19] This model is consistent with the direction of the Defence Industrial Strategy, which emphasises faster innovation cycles, closer integration between government, industry and academia, and the importance of locations that can support secure, collaborative and scalable defence technology development.[20]

3.13 In December 2025, HDC and the Ministry of Defence ('MOD') signed a Statement of Intent establishing a formal partnership to develop a defence cluster in the district. The agreement sets out how both organisations will work jointly to develop Project FAIRFAX at the Wyton Campus into a nationally significant centre for defence, intelligence and innovation.[21] More recently in June 2026, a Partnership Agreement built on the Statement of Intent with additional parties becoming signatories of the shared ambition to bring forward the defence cluster including CPCA, Urban&Civic and Newlands Developments.[22]

3.14 This development represents a **material shift in the maturity and political backing underpinning the defence cluster proposition** in Huntingdonshire since 2025 EENA was prepared. Growing operational personnel demand at RAF Wyton through the Statement of Intent and creating a dedicated innovation centre through project FAIRFAX creates a coherent and credible anchor for employment growth and a secured driver of demand for new homes and jobs in the area.

[17] Huntingdonshire District Council, 2025. Huntingdonshire Economic Growth Strategy

[18] Cyber and Specialist Operations Command, 2025. Project FAIRFAX Wyton Campus: The Heart of Defence's Intelligence Ecosystem

[19] Cyber and Specialist Operations Command, 2025. Project FAIRFAX Wyton Campus: The Heart of Defence's Intelligence Ecosystem

[20] Ministry of Defence, 2025. Defence Industrial Strategy

[21] Huntingdonshire District Council, 2025. Statement of Intent Signed to Development Defence Cluster in Huntingdonshire

[22] Huntingdonshire District Council, 2026. Partnership Agreement Strengthened at UKREiiF to Support Delivery of the Huntingdonshire Defence Cluster

Logistics

3.15 Logistics and distribution is a strategically significant activity for Huntingdonshire. While outside the IS-8 framework of the Modern Industrial Strategy, it is widely agreed that the sector nonetheless performs an important enabling function within the regional and national supply chain and provides accessible employment for residents who may face barriers to entry to higher-skill activities.[23]

3.16 Huntingdonshire's position on the strategic road network is the primary determinant of its attractiveness to logistics occupiers. Direct access to the A1(M) and A14 provides efficient connections to the East Midlands, Yorkshire, East Anglia, and the port of Felixstowe, making the district operationally viable for regional and national distribution operators. The underway A428 upgrade, will further improve westward connectivity to the M1 corridor.[24]

3.17 Within the CPCA area, Huntingdonshire plays a dominant role in the supply of industrial and logistics space. Analysis indicates that the district accommodates approximately 21% of the CPCA's total logistics floorspace and 25% of its general industrial floorspace, with nearly 45% of all commercial floorspace in Huntingdonshire classified as storage and distribution.[25] On a per capita basis, Huntingdonshire has more general industrial space per person than any other CPCA local authority with the exception of Fenland. This established base reflects the district's long-standing role as a primary supply location of industrial and distribution activity across the wider regional economy.

Advanced manufacturing

3.18 Advanced manufacturing is identified as growth priority for Huntingdonshire in the EGS and the CPCA LGP.As set out in the EENA, this sector encompasses activities that typically require more flexible, higher-specification premises than traditional manufacturing, alongside stronger power and digital infrastructure, and proximity to research, design and skills asset.

3.19 In June 2025, the Government published the Advanced Manufacturing Sector Plan as part of the UK's Modern Industrial Strategy, with an ambition to nearly double annual business investment in the sector, [26] giving UK firms an edge in six advanced manufacturing industries of the future. Advanced manufacturing is described as the backbone of the economy, directly supporting around 760,000 jobs and contributing more than £82 billion gross value added to the UK economy every year. The Government's target is to increase annual business investment in the sector from £21 billion to £39 billion by 2035. The Sector Plan recognises that advanced manufacturing is undergoing significant transformation through decarbonisation and digitisation, and that this transformation offers considerable commercial opportunities over the next decade. Of direct relevance to Huntingdonshire, the Sector Plan acknowledges that 84% of advanced manufacturing jobs are located outside London and commits to supporting clusters where such skills are concentrated, including across the Oxford-Cambridge Growth Corridor.

3.20 Alongside the Sector Plan, Skills England published its Sector Skills Needs Assessment for Advanced Manufacturing in June 2025.[27] This assessment identifies automation, digitalisation and environmental sustainability as the core drivers of future skill demand in the sector. The report highlights challenges both in recruiting into the advanced manufacturing workforce and in providing sufficient training to reskill existing staff, and finds that manufacturing has the third highest skill shortage vacancy density of any industry. Filling this skills gap could generate £6 billion to the UK economy each year. These findings reinforce the

[23] Savills and British Property Federation, 2026. Industrial and Logistics: The Infrastructure of everything

[24] Huntingdonshire District Council, 2025. Huntingdonshire Economic Growth Strategy

[25] CoStar, 2026. Volterra analysis, 2026.

[26] Department for Business and Trade. 2026. Advanced Manufacturing Sector Plan

[27] Skills England, 2025. Sector Skills Needs Assessment for Advanced Manufacturing

importance of workforce development and proximity to further and higher education providers as locational factors, as identified in the EENA.

3.21 Huntingdonshire has a significant inherited manufacturing base on which growth ambitions can be built. Location quotient analysis[28] indicates that manufacturing employment is concentrated at almost twice the national average, with a location quotient of 1.9, and that advanced manufacturing is approximately 1.6 times more prevalent in the area than at the national level. This concentration reflects a long-standing industrial heritage and an accumulated skills base in technical and engineering disciplines that is directly applicable to several of the IS-8 priority sectors.

3.22 Against this foundation, however, the EGS records a 20% decline in advanced manufacturing employment in the district between 2018 and 2023, contrasting with the East of England (-4%) and England (+8%) averages over the same period. This trajectory underlines the importance of active policy and investment support for the sector's transition towards higher-value activities, rather than reliance on the continuation of existing concentrations.

3.23 The CPCA LGP places particular emphasis on Huntingdonshire's capacity to support production and scale up activity in advanced manufacturing within the wider regional economy. It notes that growth in the sector depends on the ability to scale production and adopt new manufacturing formats and that locations capable of supporting the full manufacturing are crucial to long-term performance. Huntingdonshire is positioned as the location within the CPCA area where production and scale-up activity can be accommodated in a manner that complements, rather than competes with, Cambridge's research and innovation functions. Recent delivery patterns for industrial floorspace are consistent with this role: Huntingdonshire accounted for approximately 60% of all general industrial floorspace (including manufacturing) constructed or renovated across the CPCA area between 2011 and 2025, indicating that the conditions for industrial development have been more favourable in the district than elsewhere in the region.[29]

Alignment of the employment land strategy with the economic growth ambitions of the district

3.24 The strategic context set out in this section aligns closely with scenarios/future visions of Huntingdonshire in which industrial and logistics activities play an important role, as per the underpinning logic identified in the EENA as the preferred basis for the employment land strategy.

3.25 For storage and distribution, the EENA's recommendation of Scenario 1b rests on the evidence-based observations that Huntingdonshire has underperformed relative to neighbouring local authority areas in logistics floorspace delivery since 2009, and that this pattern is more consistent with supply constraints than with a genuine absence of occupier demand. The improvements to the A14 and the underway A428 upgrade further strengthen the district's (potential future) operational attractiveness to logistics occupiers. In addition, the fact that Huntingdonshire accommodates 21% of the CPCA's logistics floorspace confirms its established and regionally significant role as a storage and distribution hub. These factors justify applying the aspirational Scenario 1b trajectory to storage and distribution, which effectively benchmarks the district's potential employment growth against what comparable corridor locations with fewer supply constraints have already achieved. Importantly, the scenario does not project growth beyond what has already been demonstrated to be achievable in the district or surrounding boroughs.

[28] Location quotient analysis for sectors is a tool used to measure the concentration of a particular sector in a specific geographical area relative to a larger refence area (such as regional or national level). It has been calculated by comparing the share of a sector's employment in Huntingdonshire to the share of employment in the same sector at the national level.

[29] CoStar, 2026. Volterra analysis, 2026.

3.26 For general industrial uses, the EENA's preferred scenario (Scenario 2b) already represents a more ambitious trajectory than the baseline Oxford Economics forecast, which projects a decline in manufacturing employment. The CPCA LGP's identification of the NHGC as a priority opportunity zone for advanced manufacturing, the strengthening of the defence cluster through Project FAIRFAX and signalled by the Statement of Intent, and the district's continued role as the primary location within the CPCA area for the delivery of general industrial floorspace are consistent in their ongoing need for such space. The EENA's analysis demonstrated that Huntingdonshire's manufacturing employment has performed better than national projections would suggest over the ten years to 2023, and that Scenario 2b, which reflects the sectoral employment profile of the district's own residential workforce, is a more appropriate basis for planning than the baseline forecast (of manufacturing decline). The defence and advanced manufacturing propositions described in this section represent the kind of high value, high productivity activity that the Scenario 2b approach is designed to capture: employment driven by population-linked labour supply growth, and in which Huntingdonshire's workforce already participates at rates significantly above the national average.

4. Sensitivity of the findings of the EENA to different housing targets

The relationship between homes and jobs

4.1 The NPPF makes clear that achieving sustainable development means the planning system must provide for homes, commercial development, facilities and infrastructure which meets society's needs, and that **local authorities must accordingly seek to balance housing supply with job creation**, to support businesses by ensuring access to a local workforce.[30]

4.2 The relationship between housing and employment needs is further reinforced in PPG. As highlighted in the EENA and **Section 2** of this addendum, labour supply models are based on population and economic activity projections highlighting that the scale of housing planned for an area directly influences the size of the available labour force, and in turn the quantum of employment development that can be supported. Good planning warrants that the conditions for job opportunities are made available to support the economic prosperity of additional population/communities inhabiting new homes.

Implications of the revised Standard Method

4.3 Housing targets for plan-making are now derived using a mandatory approach known as the Standard Method. In light of amendments made in 2025 to the Standard Method for accessing local housing need, some of the results of the 2025 EENA, where they were built from/relied on inputs relating to the housing trajectory being planned for (labour supply scenario), have been tested and are superseded. **The results in this section of the EENA Addendum supersede the net requirement figures presented in Table 13.2 of the 2025 EENA, in part.** The elements superseded relate specifically to the housing-led scenarios of 2a, 2b and 2c.

4.4 In the 2025 EENA, scenarios 2a, 2b and 2c were each modelled using a housing need figure of 1,214 net additional dwellings per annum, derived from the Standard Method applicable at the time of preparation.[31] This figure provided the starting point for the housing-led population projections developed by Iceni Projects Ltd. to underpin the housing need assessment. Sensitivity tests were undertaken to test different housing targets, including +10% which implied 1,335 net additional dwellings per annum. Once the additional labour supply had been derived in each case and adjusted to reflect unemployment rates, the ratio of workplace-based to residence-based employment, and double-jobbing factors, sector to land use profiles, employment density benchmarks, and plot ratios were applied to translate that labour supply into a floorspace requirement by scoped in use class.

4.5 Since the 2025 EENA analysis was completed, HDC has reviewed its housing need position in the context of the emerging Local Plan and in light of revisions to the Standard Method. Two updated housing needs figures have been tested as part of this addendum, as summarised in **Figure 4-1.** The two figures tested are:

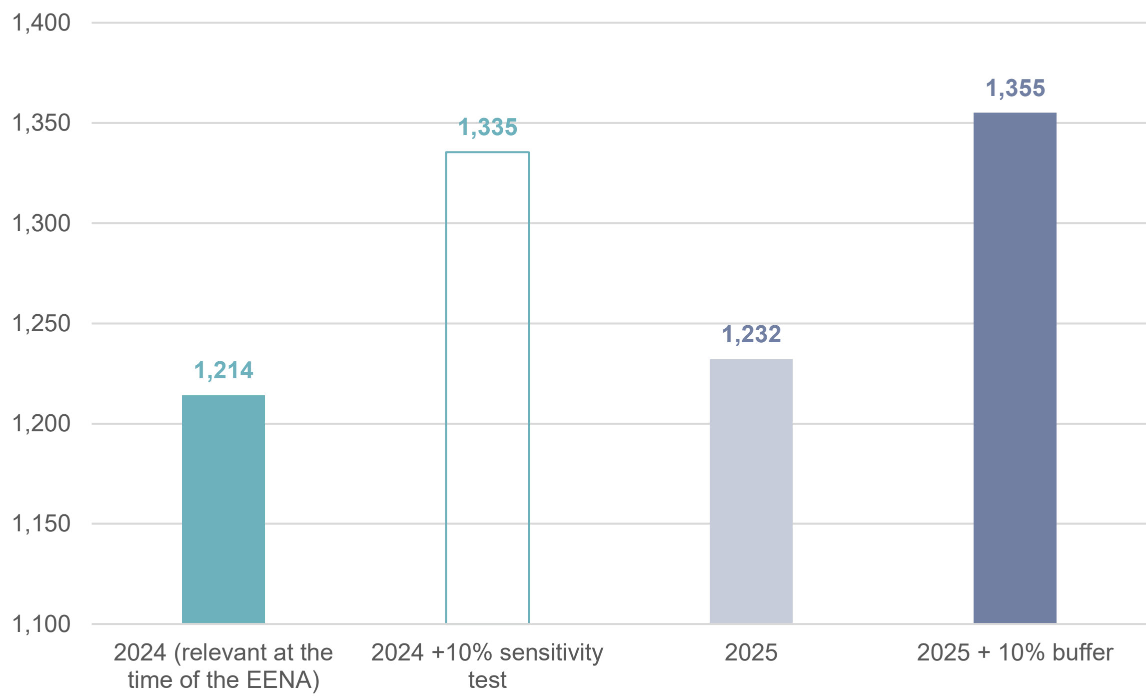
[30] Ministry of Housing, Communities and Local Government, 2025. National Planning Policy Framework

[31] The Standard Method using data available at December 2024 was used in the original EENA.

- 1,232 dwellings per annum, representing the 2025-based Standard Method;
- **1,355 dwellings per annum, representing the 2025-based Standard Method with a +10% buffer applied. This represents the target on which the emerging Local Plan is based**;

Figure 4-1 – Revisions to the Standard Method have resulted in a 1.5% increase in HDC's housing need figure versus that tested in the 2025 EENA

Number of dwellings underpinning labour supply scenario modelling



Source: Ministry of Housing, Communities and Local Government, 2025. Volterra analysis, 2026

4.6 The output of the 2025-based Standard Method with a 10% buffer applied forms the basis of the emerging Local Plan's housing target. HDC has chosen to plan above the Standard Method to provide flexibility in housing supply over the plan period and to support the district's economic growth ambitions. Planning at this level means that the labour supply available to the local economy reflects the district's growth aspirations rather than a minimum baseline.

4.7 This approach has a direct bearing on the employment land assessment. The labour supply underpinning the housing-led scenarios is derived from the housing trajectory, so a higher housing figure produces a correspondingly greater labour supply. This translates, through the established methodology, into a higher derived need for employment floorspace across the relevant use classes. The additional floorspace need arising from the buffer therefore represents capacity above what a minimum housing trajectory would generate. This is of particular relevance to the district's aspirations for growth in sectors such as defence and advanced manufacturing, where future demand may exceed the levels that projections based on recent historical trends alone would suggest. HDC's decision to plan above the Standard Method minimum therefore provides a basis for accommodating demand from emerging growth sectors at a higher level than modelling based on historical trends alone would produce.

4.8 The methodology applied to derive the additional floorspace need from the updated housing figures is consistent in all respects with the approach set out in Chapters 12 and 13 of the 2025 EENA and in the **Approach to the EENA** section of this addendum. The updated labour supply projections retain the same assumptions regarding unemployment rates, the ratio of workplace-based employment, and the adjustment for double jobbing. The sector to use profile, employment density benchmarks and plot ratios also remain unchanged. The same adjustments for frictional vacancy, replacement of losses, and existing stock have likewise been applied.

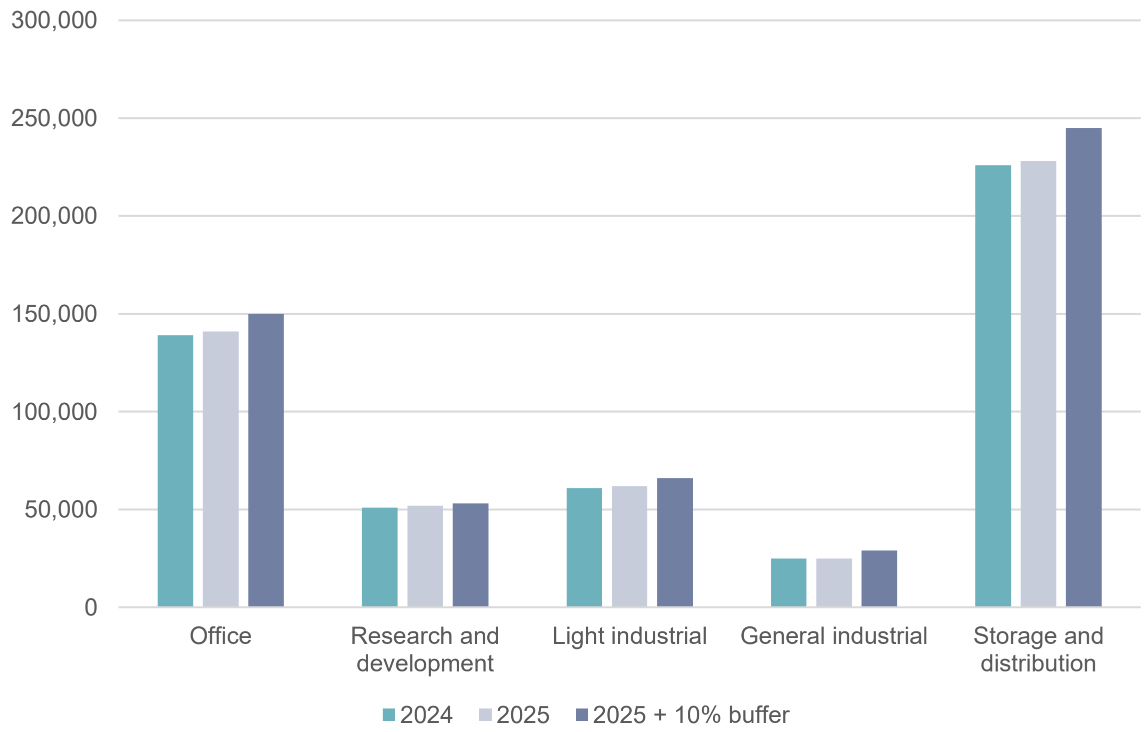
Updated results for Scenarios 2a, 2b and 2c

Scenario 2a

4.9 The updated net floorspace requirements for Scenario 2a, across the housing need assumptions and compared to the 2025 EENA baseline of 1,214 dwellings per annum are presented in **Figure 4-2** and **Table 4-1.**

Figure 4-2 – The revised housing targets represent an 8% increase in employment floorspace need under Scenario 2a Scenario 2a

Scenario 2a net floorspace requirements by employment use under the revised housing need figures (sqm)



Source: Volterra analysis, 2026

Table 4-1 – The revised housing targets represent an 8% increase in employment floorspace need under Scenario 2a

Scenario 2a net floorspace requirements by employment use under the revised housing need figures (sqm). The difference versus the 2025 EENA results is shown in brackets.

	Housing need	Office	Research and development	Light industrial	General industrial	Storage and distribution
2024 (2025 EENA)	1,214	139,000	51,000	61,000	25,000	226,000
2025	1,232	141,000 (+2,000)	52,000 (+1,000)	62,000 +(1,000)	25,000 (+/- 0)	228,000 (+2,000)
2025 + 10% buffer	**1,355**	**150,000 (+11,000)**	**53,000 (+2,000)**	**66,000 (+5,000)**	**29,000 (+4,000)**	**245,000 (+19,000)**

Source: Volterra analysis, 2026

4.10 Compared to the 2025 EENA baseline of 1,214 dwellings per annum, under Scenario 2a, the 1,355 dwellings per annum assumption represents increase in need of:

- 11,000 sqm of office floorspace;
- 2,000 sqm of research and development floorspace;
- 5,000 sqm of light industrial floorspace;
- 4,000 sqm of general industrial floorspace; and
- 19,000 sqm of storage and distribution floorspace..

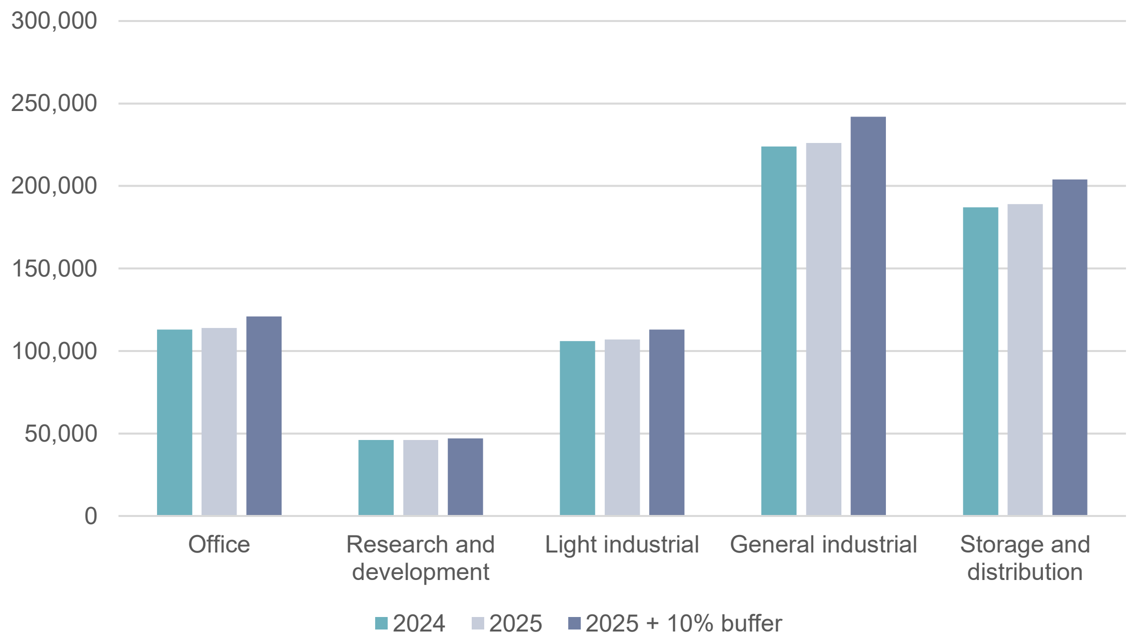
4.11 The unbuffered assumptions of 1,232 per annum produces a minor change relative to the 2025 EENA baseline, with differences no more than 3,000 sqm across all use classes.

Scenario 2b

4.12 The updated net floorspace requirements for Scenario 2b, across the housing need assumptions and compared to the 2025 EENA baseline of 1,214 dwellings per annum, are presented in **Figure 4-3** and **Table 4-2**

Figure 4-3 – The revised housing target represents an 8% increase in employment floorspace need under Scenario 2b

Scenario 2b net floorspace requirements by employment use under the revised housing need figures (sqm).



Source: Volterra analysis, 2026

Table 4-2 – The revised housing target represents an 8% increase in employment need under Scenario 2b

Scenario 2b net floorspace requirements by employment use under the revised housing need figures (sqm). The difference versus the 2025 EENA results is shown in brackets.

	Housing need	Office	Research and development	Light industrial	General industrial	Storage and distribution
2024 (EENA)	1,214	113,000	46,000	106,000	224,000	187,000
2025	1,232	114,000 (+1,000)	46,000 (+/-0)	107,000 (+1,000)	226,000 (+2,000)	189,000 (+2,000)
2025 + 10% buffer	**1,355**	**121,000 (+8,000)**	**47,000 (+1,000)**	**113,000 (+7,000)**	**242,000 (+18,000)**	**204,000 (+17,000)**

Source: Volterra analysis, 2026

4.14 Compared to the 2025 EENA baseline of 1,214 dwellings per annum, the 1,355 dwellings per annum assumption under Scenario 2b represents increases of:

- 8,000 sqm of office floorspace;

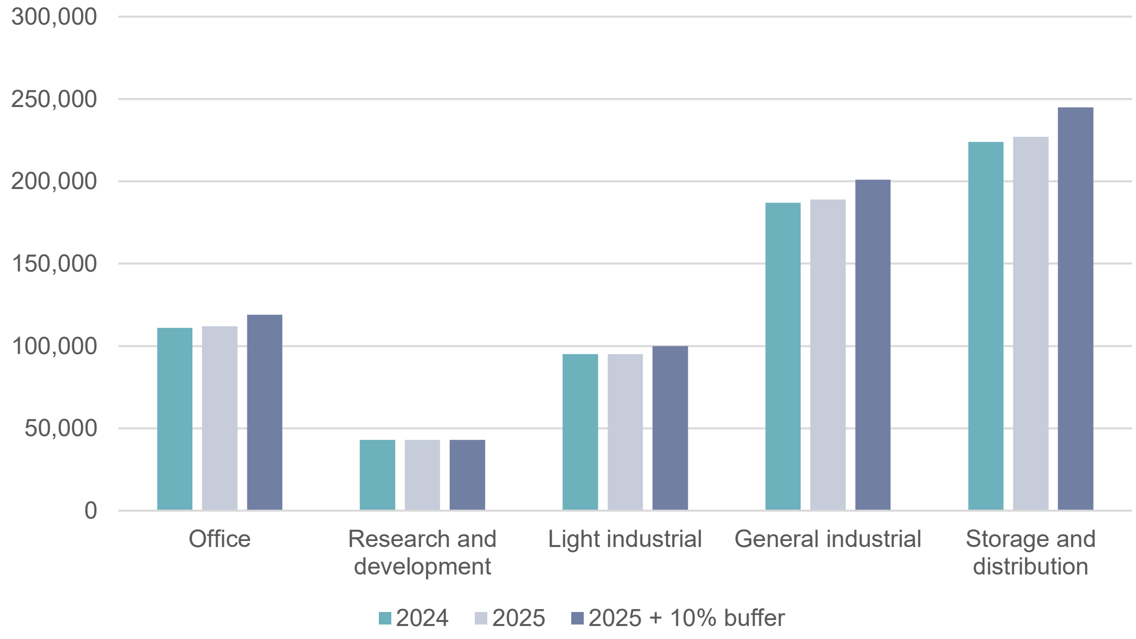
- 1,000 sqm of research and development floorspace;
- 7,000 sqm of light industrial floorspace;
- 18,000 sqm of general industrial floorspace; and
- 17,000 sqm of storage and distribution floorspace.

Scenario 2c

4.15 The updated net floorspace requirements for Scenario 2c, across the housing need assumptions and compared to the 2025 EENA baseline of 1,214 dwellings per annum are presented in **Figure 4-4** and **Table 4-3**

Figure 4-4 – The revised housing target represents a 7% increase in employment floorspace need under Scenario 2c

Scenario 2c net floorspace requirements by employment use under the revised housing need figures (sqm)



Source: Volterra analysis, 2026

Table 4-3 – The revised housing targets represent a 7% increase in employment floorspace need under Scenario 2c

Scenario 2c net floorspace requirements by employment use under the revised housing need figures (sqm). The difference versus the 2025 EENA results is shown in brackets.

	Office	Research and development	Light industrial	General industrial	Storage and distribution
2024	111,000	43,000	95,000	187,000	224,000
2025	112,000 (+1,000)	43,000 (+/-0)	95,000 (+/-0)	189,000 (+2,000)	227,000 (3,000)
2025 + 10% buffer	**119,000** **(+8,000)**	**43,000** **(+/-0)**	**100,000** **(+5,000)**	**201,000** **(+14,000)**	**245,000** **(+21,000)**

Source: Volterra analysis, 2026

4.16 Compared to the 2025 EENA baseline of 1,214 dwellings per annum, the 1,355 dwellings per annum assumption under Scenario 2c represents increases of:

- 8,000 sqm of office floorspace;
- No change in research and development floorspace;
- 5,000 sqm of light industrial floorspace;
- 13,000 sqm of general industrial floorspace; and
- 21,000 sqm of storage and distribution floorspace.

4.17 Across all three housing-led scenarios, the pattern of results is consistent. The changes relative to the 2025 EENA baseline are proportion to the scale of the housing need uplift from 1,214 dwellings per annum to the buffered figures tested above.

Implications for the preferred scenario

4.18 As established in **Section 2** of this addendum, the preferred scenario in the EENA is a blend of Scenario 1b and Scenario 2b. This determination was made having regard to the full range of evidence set out in the original assessment and is not affected by this addendum. Having reviewed the implications of the updated demand modelling, the hybrid of Scenario 1b and 2b remains the preferred approach.

4.19 The Scenario 1b element of the preferred blend is unaffected by the updated housing assumptions. The floorspace requirement of 433,000 sqm for storage and distribution identified for Scenario 1b in the 2025 EENA is therefore retained.

4.20 The Scenario 2b element of the preferred blend is subject to a modest upward revision across all use classes under the principal housing assumptions. Under the 1,355 dwellings per annum figure, the increases in floorspace need relative to the 2025 EENA range from 1,000 sqm in research and development to 18,000 sqm in general industrial. The step from 1,214 to 1,355 dwellings per annum represents a housing need uplift of around 11%. The changes in floorspace need across use classes under Scenario 2b are broadly in line with the uplift, and in several use classes the proportionate increase in floorspace need falls below the proportion increase in the housing need figure.

Table 4-4 – Revisions to the Standard Method (2025-based) result in a modest uplift in employment need in Huntingdonshire

Comparison between the employment need identified in the 2025 EENA and the updated figures based on the revised housing need figure of 1,355 dwellings per annum. The difference versus the 2025 EENA results is shown in brackets.

1,355 dwellings per annum	Change in jobs (FTE)	Floorspace target	Land target (ha)
Office	5,600 (+600)	121,000 (+8,000)	18.0 (+1.2)
Research and development	300 (+/- 0)	47,000 (+1,100)	5.7 (+0.1)
Light industrial	1,300 (+100)	113,000 (+7,000)	23.6 (+1.5)
General industrial	4,400 (+400)	242,000 (+18,000)	80.6 (+6.0)
Storage and distribution	3,800 (+/- 0)	433,000 (+/- 0)	110.9 (+/- 0)
Total	**15,400** **(+1,000)**	**955,000** **(+33,000)**	**239** **(+9.0)**

Source: Volterra analysis, 2026. Figures may not sum due to rounding.

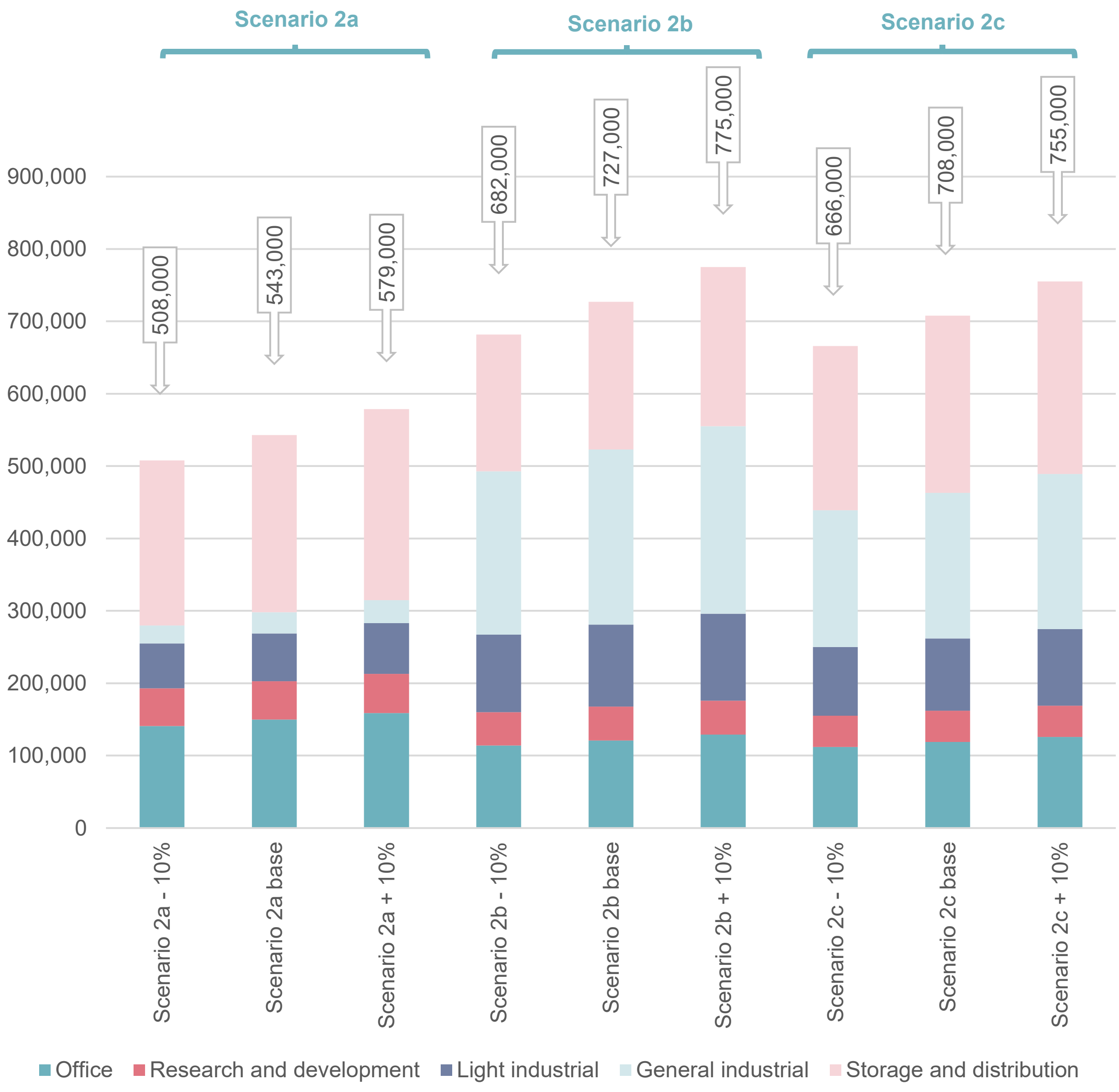
The updated modelling does not give rise to a disproportionate or unrealistic change in the assessment of employment need. The increases in floorspace requirements that result from the higher housing assumptions are modest in the context of the overall need figures and are within the bounds that would be expected from an upward revision of this scale. The **Gap analysis** section of this addendum assesses the revised position with respect to employment land supply in more detail and confirms that there is sufficient supply to accommodate the level of need established by the preferred scenario, including the modest increases that flow from the updated housing assumptions.

Sensitivity tests

4.21 As in Chapter 14 of the EENA, the sensitivity of labour supply scenarios is tested through adjustments to the labour supply that would result from delivery of housing which is 10% below per annum need, and 10% higher than per annum need. In all scenarios, the need requirement scales with the housing trajectory, i.e. higher housing supply produces higher employment use need, and vice versa. Any delivery of housing which exceeds the buffered Standard Method assumptions (1,355 dwellings per annum) derived labour supply (on which revised scenarios 2a – 2c are based), would require additional floorspace and land to that reported as the preferred scenario.

Figure 4-5 – Labour supply is tied to housing delivery such that delivery of housing above the buffered 2025-based Standard Method need figures would imply additional employment floorspace need

Sensitivity of labour supply scenarios to higher and lower housing delivery than 1,355 per annum. Net need position following a 10% deduction and 10% increase to housing delivery versus buffered Standard Method figures (sqm)



Source: Volterra analysis, 2026

Sensitivity test results

4.22 The results of this sensitivity test are shown in comparison to the core modelling in **Table 4-5**. As highlighted in the EENA, the sensitivity test does not feed into the scenario results but it is conducted in order to illustrate whether changing the housing need assumption would be impactful on the overall results of the modelling. If the Standard Method or HDC's position on housing need changes over the plan period, the results of this test would be insightful for understanding how the overall housing need for employment floorspace could be different.

Table 4-5 – The sensitivity test demonstrates how a higher/lower housing need target could affect overall need over the study period

+10% / -10% increase to the housing need target of 1,355 dwellings per annum

Scenario	1a	1b	2a	2b	2c	3a
Office						
Core modelling (sqm)	81,700	94,500	149,700	120,800	118,800	38,000
Core modelling (ha)	12.2	14.1	22.3	18	17.7	5.7
Housing delivery -10% (sqm)			140,800	113,600	111,800	
Housing delivery -10% (ha)			21.0	17.0	16.7	
Housing delivery +10% (sqm)			159,500	128,700	126,500	
Housing delivery +10% (ha)			23.8	19.2	18.9	
Research and development						
Core modelling (sqm)	44,500	45,100	52,600	46,500	43,200	29,300
Core modelling (ha)	5.4	5.5	6.4	5.7	5.3	3.6
Housing delivery -10% (sqm)			51,500	45,900	42,900	
Housing delivery -10% (ha)			6.3	5.6	5.2	
Housing delivery +10% (sqm)			53,700	47,200	43,500	
Housing delivery +10% (ha)			6.5	5.8	5.3	
Light industrial						
Core modelling (sqm)	36,500	95,100	65,500	113,500	100,300	20,200
Core modelling (ha)	7.6	19.8	13.6	23.6	20.9	4.2
Housing delivery -10% (sqm)			61,600	107,300	95,300	
Housing delivery -10% (ha)			12.8	22.3	19.9	

Scenario	1a	1b	2a	2b	2c	3a
Housing delivery +10% (sqm)			69,800	120,300	105,800	
Housing delivery +10% (ha)			14.5	25.1	22	
General industrial						
Core modelling (sqm)	6,200	174,100	28,700	241,700	200,900	137,900
Core modelling (ha)	2.1	58	9.6	80.6	67	46
Housing delivery -10% (sqm)			25,300	226,100	189,000	
Housing delivery -10% (ha)			8.4	75.4	63	
Housing delivery +10% (sqm)			32,500	258,900	214,000	
Housing delivery +10% (ha)			10.8	86.3	71.3	
Storage and distribution						
Core modelling (sqm)	116,100	432,700	245,100	203,600	245,500	234,300
Core modelling (ha)	29.8	110.9	62.8	52.2	62.9	60.1
Housing delivery -10% (sqm)			228,300	188,900	227,000	
Housing delivery -10% (ha)			58.5	48.4	58.2	
Housing delivery +10% (sqm)			263,600	219,700	265,800	
Housing delivery +10% (ha)			67.6	56.3	68.2	

Source: Volterra analysis, 2026

5. Gap analysis

5.1 At the time of the 2025 EENA, a review of Huntingdonshire's business commitments indicated that the potential pipeline of employment floorspace that could come forward and contribute to future supply would in sum deliver 435,000 sqm (net) across all scoped-in uses. This was based on data published in May 2024.

5.2 A review of the latest commitments data (up to May 2025) provided by HDC indicates that the updated net pipeline totals approximately 429,000 sqm, as set out in

5.3 **Table** 5-1 below. This represents a reduction of approximately 6,000 sqm relative to the position reported in the 2025 EENA.

5.4 The latest pipeline data and existing supply data recording periods do not overlap, given supply data was collected in May 2025. All recorded deliveries since May 2025 should be viewed as contributing to the identified need in this EENA Addendum.

5.5 The pipeline comprises employment floorspace for which one of the following planning statuses applies at the reference date of the commitments dataset. The categories used in the current analysis are consistent with those applied in the 2025 EENA:

- Outline permission: planning permission is granted for the principle of development, with details reserved for subsequent approval;
- Under construction: a start on site has been made and construction is actively underway at the reference date;
- Unimplemented permission: planning permission has been granted but no material start on site has been recorded.
- Allocated site: the floorspace is contained within a site allocated for employment uses in the current development plan but no planning permission has been granted.

5.6 Net pipeline figures are derived by offsetting gross gains in employment floorspace against recorded losses across each planning category and use class. This ensures that the pipeline totals reflect anticipated net additions to the employment stock, consistent with the net basis on which need is assessed throughout the 2025 EENA and this addendum.

5.7 The methodology applied to the latest business commitments dataset is consistent in all material respects with the approach used in the 2025 EENA.

Table 5-1 – The pipeline of committed developments in Huntingdonshire for scoped-in uses total 429,000 sqm

The updated pipeline of committed developments in Huntingdonshire by planning status and use class compared to the 2025 EENA (net, sqm)

Status	Office	R&D	Light industrial	General industrial	Storage and distribution	E(g) unknown	Total
Outline	38,300 (-1,800)	60,700 (-500)	75,000 (+11,900)	49,900 (+11,200)	34,200 (+11,300)	59,400 (+/- 0)	317,600 (+32,600)
Under construction	-400 (-9,000)	3,500 (+1,900)	3,300 (+800)	6,500 (-18,100)	13,800 (+4,600)	4,500 (+4,120)	31,300 (-16,400)
Un-implemented	33,200 (+2,600)	0 (-2,200)	2,000 (-6,000)	16,400 (-3,500)	13,100 (-17,000)	300 (-2,400)	65,000 (-28,400)
Allocation	3,300 (+/- 0)	3,300 (+/- 0)	4,300 (+/- 0)	4,400 (+6,700)	0 (+/- 0)	0 (+/- 0)	15,400 (+6,700)
Total	74,500 (-8,900)	67,600 (-700)	84,700 (+6,800)	77,200 (-3,700)	61,000 (-1,200)	64,200 (+1,700)	429,300 (-5,700)

Source: Huntingdonshire District Council, 2026. 2025 Business Commitments. Figures may not sum due to rounding

5.8 Approximately 64,200 sqm of the pipeline comprises E(g) floorspace of unknown use, which has not been attributed to any individual use class in the gap analysis below. Once the use is confirmed, this figure should be deducted from the relevant use class accordingly.

5.9 As in the 2025 EENA, the pipeline is presented as a potential supply rather than as committed certainty. Not all of the pipeline can be expected to come forward in its entirety. Outline and unimplemented permissions carry the greatest risk of not being delivered; some will lapse without implementation, and others may come forward at a different scale or in a different use class from that originally envisaged. Notwithstanding this, a significant proportion of the pipeline will come forward and will make a material contribution towards the overall need identified in the preferred scenario. The under construction element, at approximately 31,000 sqm is the component with the greatest certainty about being delivered, given that construction has already commenced. However, the scale of the preferred scenario need is such that a substantial allocation of additional employment land beyond what is already committed remains necessary to provide confidence that the target can be met.

5.10 The reduction in the total net pipeline from 435,000 sqm, as identified in the 2025 EENA, to approximately 429,000 sqm is mostly driven by the office category, where the permissions data suggests that the committed pipeline has reduced by 8,900 sqm. The most likely explanation is a combination of permissions have been implemented and some lapse of commitments since the 2024 reference data of the 2025 EENA. The overall pipeline for research and development and storage and distribution is broadly comparable to the EENA position.

Net gap analysis

5.11 This section compares the identified net employment floorspace need within the updated supply pipeline, in order to establish the residual requirement that the Local Plan's allocation strategy must address.

5.12 The gap analysis identifies the difference between the overall net need and the total committed pipeline as the residual requirement that the Local Plan's allocation strategy must address at a minimum, recognising that **the pipeline will make a meaningful but uncertain contribution towards meeting employment need over the Plan period**.

5.13 The pipeline total is compared against the five scoped-in use classes only. The approximately 64,000 sqm of unspecified E(g) pipeline floorspace is recorded separately as a potential additional source of supply; its contribution is noted in aggregate in **paragraph 5.18** but it is not attributed to any specific use class in the use class level comparison below.

Table 5-2 – There is a residual gap of at least 527,000 sqm of employment floorspace not already coming forward through the pipeline (in the best case scenario that the entire pipeline is delivered)

Net gap analysis: preferred scenario need against the updated pipeline supply (sqm)

Employment use	Need at 1,355 dpa	Pipeline supply (net)	Residual gap at 1,355 dpa
Office	121,000	74,500	-46,500
Research and development	47,000	67,600	+20,600
Light industrial	113,000	84,700	-28,300
General industrial	242,000	77,200	-164,800
Storage and distribution	433,000	61,000	-372,000
Sub-total (scoped-in uses)	956,000	365,000	-591,000
Unspecified pipeline	-	64,200	-
Total including unspecified	**956,000**	**429,000**	**-527,000**

Source: Huntingdonshire District Council, 2026. 2025 Business Commitments; Volterra analysis, 2026. Note: '+' represents a surplus against identified need for that use class. Figures may not sum due to rounding.

5.14 The gap analysis shows a different supply position across the five scoped in use classes. For office uses, the pipeline of approximately 74,500 sqm represents around 62% of the identified need of 121,000 sqm, leaving a residual gap of approximately 46,500 sqm. In line with the 2025 EENA, despite a decline of 9,000 sqm, the office pipeline is substantial and reflects a clear appetite for future delivery of office space, which would not be expected to stall such that the target would become unachievable.

5.15 For light industrial uses, the pipeline of approximately 84,700 sqm represents around 75% of the identified need of 113,000 sqm at the 1,355 dwellings per annum assumption, leaving a residual gap of approximately 28,300 sqm.

5.16 For research and development, the current pipeline of approximately 67,600 sqm exceeds the identified need of 47,000 sqm under both housing assumptions, giving a surplus of approximately 20,000 sqm. Office use and research and development both fall within Use Class E under the Town and Country Planning Order, which permits movement between uses within this class without the need for further planning permission.[32] In practice, committed research and development space may come forward as office space depending on occupier demand at the point of delivery. This flexibility means that the nominal research and development surplus may act as a potential contribution towards closing the residual office gap of 46,500 sqm, rather than as a discrete excess of supply for that use class.

5.17 For general industrial uses, the gap between the identified need of approximately 242,000 sqm and the pipeline supply of approximately 77,200 sqm is substantial, at approximately 164,800 sqm under the 1,355 dwellings per annum assumption. For storage and distribution, the pipeline of approximately 61,000 sqm represents just 14% of the identified net need of 433,000 sqm. The scale of the residual gap underlines the need for the Local Plan to allocate sufficient general industrial and storage and distribution land to support the growth trajectories set out in Huntingdonshire's Economic Growth Strategy and the CPCA LGP. Meeting this need depends on the allocation of strategic sites capable of accommodating large-scale logistics and distribution development, some of which are highlighted in **Strategic sites** section of this addendum.

5.18 In aggregate, the total pipeline of approximately 365,000 sqm across the five scoped-in classes represents approximately 38% of the preferred scenario need of 956,000 sqm. Including the unspecified pipeline of approximately 64,200 sqm, the total committed supply is 429,000 sqm, equivalent to approximately 45% of the preferred scenario need. In practice, given the attrition that typically affects outline and unimplemented permissions, the effective contribution of the pipeline will be lower than the headline total, and the allocation requirement correspondingly larger. This confirms the conclusion reached in the 2025 EENA that additional employment land allocations are needed to close the gap between the committed supply and the identified net need.

5.19 The commitments dataset used in this section and the CoStar property market analysis that informs the adjustments to the gross need identified in the 2025 EENA and this addendum share a common reference date of May 2025. Planning permissions granted after that date are not captured within the pipeline figures presented in **Table 5-1**, and their contribution to supply is therefore not reflected in the gap analysis set out in **Table 5-2**. For example, Newlands Park, which will provide significant general industrial and storage and distribution space, received outline planning permission in May 2026, after the date of the commitments dataset.[33] That consent, and any other permissions approved since May 2025, will contribute towards meeting Huntingdonshire's identified employment needs over the Plan period.

5.20 Some of the pipeline supply would be expected to come forward within existing allocation and the location of the pipeline sites should be taken into account when determining whether additional land is required, which is likely given the scale of need identified.

5.21 The gap analysis above is expressed in net floorspace terms. Translating this into a land requirement depends on the plot ratios achieved on allocated and delivered sites. Pipeline sites span a wide range of locations and their individual plot ratios are not systematically recorded in the commitments dataset, HDC should treat the floorspace figures in **Table 5-2** as an indicative measure of the residual requirement when assessing whether proposed allocations are sufficient to meet identified need.

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[32] Retrieved from: https://www.planningportal.co.uk/permission/common-projects/change-of-use/planning-permission [accessed July 2026]

[33] Retrieved from: https://www.linkedin.com/feed/update/urn:li:ugcPost:7484890949509234690/ [accessed July 2026]

Monitoring

5.22 The gap analysis reflects the position at a point in time. The identified net employment need will change over time but will not be captured unless the evidence base is formally and regularly reviewed; similarly, the supply position will evolve continuously over the Plan period as pipeline permissions are implemented, new consents are granted, existing allocations come forward, and floorspace is lost from the stock.

5.23 It is therefore important that HDC continues to track the delivery of employment floorspace over time and to assess whether the trajectory of delivery remains consistent with the assumptions underpinning the preferred scenario.

5.24 In line with the NPPF, HDC should review its Local Plan policy and employment land evidence base at intervals of no more than five years. In preparation, HDC monitor employment land delivery on an annual basis, drawing on its Business Completions and Commitments dataset as the primary source of evidence. HDC may wish to consider a more regular formalised review of the employment land evidence against the monitoring data. Where annual monitoring indicates that delivery is running materially above or below the rate implied by the preferred scenario over a sustained period, this should be treated as a potential trigger for an earlier review/update of the evidence. The following circumstances would each warrant consideration of whether an update to the evidence base is required:

- Cumulative net completions of employment floorspace over a rolling three-year or five-year period fall materially short of, or significantly exceed, the proportionate share of the preferred scenario target for that period;
- A material proportion of the committed pipeline, particularly in the outline and unimplemented categories, lapses without replacement by new permissions, such that the effective supply position deteriorates significantly relative to the position in **Table 5-1;**
- A significant revision to Huntingdonshire's housing need figure materially alters the labour supply inputs to the preferred blend of Scenario 2b and Scenario 1b;
- A material change in the functional economic market area for general industrial or logistics uses, arising from new strategic road infrastructure, significant occupier relocations, or relevant planning decisions in neighbouring local planning authority areas; or
- Monitoring of storage and distribution floorspace delivery indicates that take-up is running persistently ahead of the trajectory implied by Scenario 1b, suggesting that even the aspirational approach adopted for this use class may be underestimating demand over the full Plan period.

5.25 Where take-up of employment floorspace in one or more use classes is found to be materially stronger than the preferred scenario implies over a sustained monitoring period, HDC should assess whether the allocation strategy remains sufficient to meet the residual need identified in **Table 5-2**, and whether additional sites outside of allocations should be supported.

6. Strategic sites

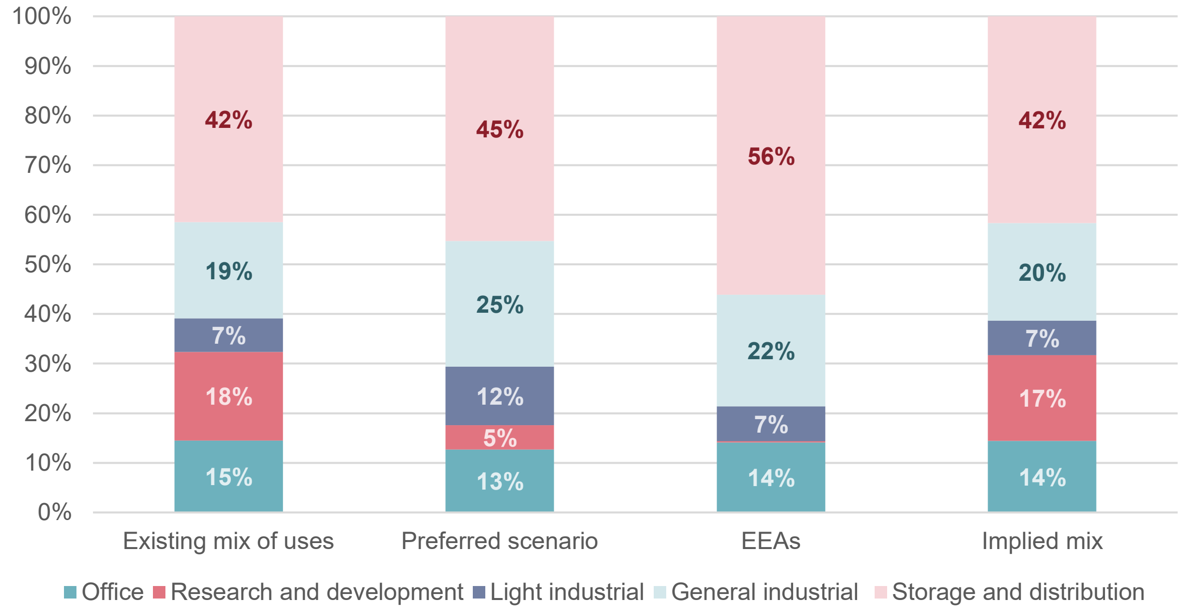
6.1 This section establishes the district-wide context for considering employment uses on strategic mixed-use sites (meaning those that are intended to bring forward a proportion of commercial uses as alongside a residential component). Potential benchmarks and principles of a sustainable mix of uses on strategic sites are discussed, followed by an assessment of the role of individual sites that currently comprise draft allocations in the emerging Local Plan.

A sustainable mix of uses

6.2 **Figure 6-1** presents the proportional distribution of the five 'scoped in' use classes across four perspectives: the existing composition/mix of employment uses across the district; the pattern of future need (net additional) identified in the preferred scenario; the use profile of the Established Employment Areas (EEAs); and the implied result of the preferred scenario being delivered. If a site were to come forward in line with any of the perspectives, the mix would be broadly similar, and **comprise a majority of industrial uses** [B2, B8] with smaller components of office, research and development and light industrial [E(g)(i)-(iii)].

Figure 6-1 – The existing and implied future mix of employment at the district level include a majority of industrial employment uses

The employment mix (% of floorspace) in Huntingdonshire across existing uses, the preferred scenario, EEAs and the implied combined mix arising from if the preferred scenario was delivered in its entirety alongside the current stock.



Source: CoStar, 2025. Huntingdonshire District Council, 2025. Economic and Employment Needs Assessment; Volterra analysis, 2026

6.3 It is recognised that some uses are more suited to the specific locational context of different sites than others, and that this is highly spatially variable across Huntingdonshire.

6.4 This variation provides evidence that EEAs in Huntingdonshire fulfil different functions and accommodate markedly different proportions of each use class depending on their spatial characteristics. The appropriate mix of employment uses on strategic sites could be guided by benchmarks but also requires consideration on a case-by-case basis.

Principles for employment component of strategic sites

6.5 The following principles inform the assessment of ('scoped in') employment uses on each of the five strategic mixed-use sites (draft forthcoming allocations) that are reviewed in this section.

Principle	Supporting text
Mixes should reflect function	The district-wide mix provides a baseline for understanding the balance of employment need at the strategic level although should not necessarily determine what proportion of each use class is appropriate on a given site. A site's **appropriate employment mix depends on its location (within the strategic site)**, its relationship to surrounding uses and infrastructure, its accessibility to the those who would be working there, and any specific employment function it is designed to serve.
Residential proximity constrains the range of compatible uses	Where a strategic site is predominantly residential and employment forms a secondary component within a broader mixed-use scheme, the uses that can be located in close proximity to homes without adverse amenity effects are more limited. **Office, research and development and light industrial uses are generally compatible with residential development** and can usually be integrated without significant conflict/prohibitive environmental impact. General industrial space is typically associated with higher levels of noise, traffic and operational activity, and its placement within or adjacent to residential areas requires careful locational consideration and a degree of physical separation. Storage and distribution typically generates heavy goods vehicle movements and is generally incompatible with integration into predominantly residential neighbourhoods unless it is situated away from residences/accessible without HGVs needing to travel through residential areas.
Clusters and target sectors may justify a distinct use mix	Where a strategic site is associated with a specific sector cluster or innovation function, that **cluster context may warrant a use mix that gives proportionately greater weight to the uses most directly associated with that sector**. In the context of Huntingdonshire's economic growth priorities, a site with a demonstrable defence, intelligence or advanced manufacturing role would be expected to accommodate a larger proportion of research and development and office space than most of the EEAs and a balanced amount of industrial (particularly B2) space.
Scale of site available for employment generating uses determines the types of uses which can reasonably be	To be operationally/functionally viable, uses have particular building requirements (size, ancillary uses, yard space and so on). **The area and shape (extent) of the site available for employment generating uses is a crucial consideration in whether certain uses would fit.** Smaller extents dedicated to employment uses within mixed-use sites are most effective when concentrated on a limited and coherent range of compatible

Principle	Supporting text
accommodated without fragmenting the offer	uses. A disparate mix of multiple uses spread across a relatively small employment parcel risks weakening the attractiveness of the site to occupiers and complicating its delivery.

Site-by-site assessment

Wyton Airfield

6.6 Wyton Airfield comprises a proposed mixed-use allocation on approximately 254 ha of former MOD land, incorporating around 4,000 homes. The employment component is envisaged to be 15 ha, proposed for a mix of commercial, business and services uses, general industrial and storage and distribution. Storage and distribution is restricted to small-scale ancillary uses or last-mile distribution functions.

6.7 Wyton Airfield has the most strategically distinct economic role of the five sites reviewed in this section. The site is one of the largest brownfield development sites in Huntingdonshire and directly adjoins the active RAF Wyton facilities. Project FAIRFAX cements an ambition to establish a cluster of technical excellence in defence intelligence and technical innovation, drawing on the co-location opportunity provided by the site's immediate adjacency to the operational station.[34]

6.8 To fulfil this, the site will need to comprise co-located businesses, research establishments and MOD facilities, with an emphasis on highly skilled, high-value employment. The masterplanning process is expected to demonstrate how the scheme would develop synergies between economic growth on the site and the intelligence and geospatial specialism hosted at RAF Wyton. This proposition is directly aligned with Project FAIRFAX and with the Statement of Intent signed between the Council and the MOD in December 2025, as described in **Section 3** of this addendum. The Defence Industrial Strategy identifies RAF Wyton as part of a key cluster for defence and dual-use innovation[35], and the promotion material situates Wyton Airfield within that strategic context.[36] Discussions are underway with key stakeholders around the masterplan and how this can best reflect current market conditions and occupier demand.

Implications for the mix of uses

6.9 The intended **defence and intelligence cluster function has a direct bearing on the most appropriate employment use mix** at Wyton Airfield. Activities associated with defence technology, geospatial intelligence and dual-use innovation are accommodated primarily in research and development and office uses: laboratory space, technical workspace and secure office facilities that meet the operational, connectivity and security requirements of intelligence and defence sector occupiers. The employment component at Wyton Airfield would therefore be expected to weigh strongly toward research and development and office, in proportions considerably above the district-wide preferred scenario benchmark.

6.10 Light industrial uses may also be appropriate at Wyton Airfield, particularly for manufacturing, assembly and test activities associated with advanced electronics, geospatial instrumentation or dual-use hardware, where production functions accompany technical and office uses on the same site. General industrial could accommodate more intensive production or evaluation facilities, but the cluster rationale suggests that general industrial would be a secondary component, and subsidiary to the research and development and

[34] Cyber and Specialist Operations Command, 2025. Project FAIRFAX Wyton Campus: The Heart of Defence's Intelligence Ecosystem

[35] Dual-use innovation in the defence context refers to the deliberate development and application of technologies, products and processes that are designed to serve both civilian and military/defence uses.

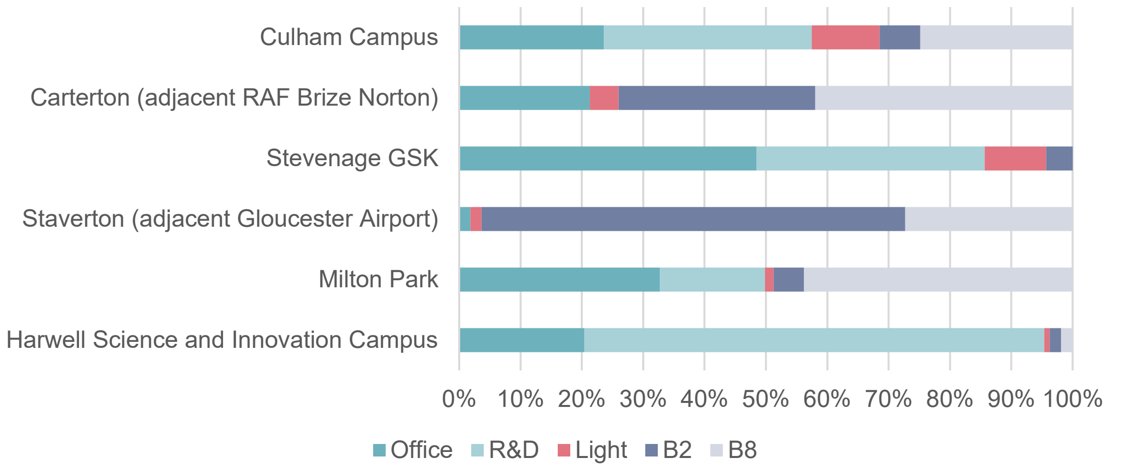
[36] Ministry of Defence, 2025. Defence Industrial Strategy

office uses that are central to the defence intelligence function. The exclusion of standalone storage and distribution is consistent with some of the existing current transport constraints identified as applicable for the site.

6.11 Analysis of precedents can be instructive for determining the appropriate mix of uses for strategic sites. A selection of comparable sites (by virtue of similar defence/aerospace/innovation cluster setting) broken down by floorspace proportions is shown in **Figure 6-2**. Those sites which have a functional focus on innovation naturally have a larger (majority) proportion of office and research and development space. Any excluded or minimised use would mean a commensurate increase in the targeted proportion of other uses.

Figure 6-2 Precedent analysis is instructive for what an appropriate mix of uses to support an innovative defence cluster might be

Proportion of floorspace by precedent by defence/aerospace/innovation cluster



Source: CoStar, 2026. Volterra analysis, 2026

Lodge Farm

6.12 Information submitted by the promoters of Lodge Farm describes a mixed-use development on approximately 318 ha, incorporating around 4,900 homes. The employment component, described as an 'innovation quarter', is expected to include commercial, business and service uses appropriate for a predominantly residential development.[37]

6.13 Lodge Farm is positioned within the NHGC. The proposed innovation quarter is described by its promoter as a mechanism for providing flexible employment space for start-up businesses alongside accommodation for established enterprises, supported by a 'Skills Academy' to connect residents of the new community with learning pathways into employment. The quarter is also described as a vehicle for creating 'transformational employment opportunities, contributing to a resilient community in which residents can access work by active travel and public transport and participate in the wider economic opportunities of the Huntingdon area'.[38]

[37] Bidwells, 2025. Huntingdonshire Regulation 18 Local Plan Consultation Response – Vistry Group

[38] Vistry Group, 2023. Lodge Farm Vision Document

Implications for the mix of uses

6.14 The innovation quarter framing points toward a use mix weighted toward flexible, multi-occupier accommodation, encompassing **managed workspace, incubator units and offices suited to knowledge-intensive and technical occupiers at varying stages of development**. Flexible managed workspace formats of this type are typically office and research and development uses and are unlikely to require the heavier operational infrastructure associated with B2 or B8. This provides a reasonable basis for the promoter's preference for an office and research and development focused employment offer, and the innovation quarter character of the site supports a higher proportionate emphasis on office and R&D uses than the district-wide benchmark would suggest.

6.15 At the same time, the site's location within the NHGC, which the CPCA LGP identifies as a priority location for advanced manufacturing and technology activities as well as innovation-led functions, introduces a reasoned basis for a limited general industrial component. Advanced manufacturing and engineering businesses, particularly those engaged in the production and scale-up activities that the CPCA LGP identifies as appropriate for the swathe of land north of Huntingdon, may require premises that combine technical workspace with fabrication, assembly or test facilities. The appropriate scale and proportion of any general industrial provision would need to reflect the residential context of the site, and general industrial uses should be placed with sufficient separation from housing to manage amenity impacts.

The Lattenburys

6.16 Information submitted by the promoters of The Lattenburys describes a mixed-use development on approximately 243 ha, incorporating around 3,400 homes across two new villages on land south of the A1307 and north of the A14.[39] The employment component is approximately 6 ha, directed toward office, research and development, light industrial and general industrial use classes. Proposals also include the retention of the Woodgreen Pets Charity facility and additional land to accommodate that organisation's future expansion needs.

6.17 The employment function of The Lattenburys is framed as supporting a sustainable new community by facilitating opportunities for residents to live and work in close proximity. The emphasis is on **uses that can co-exist with residential development without adverse amenity impact**. The exclusion of storage and distribution reflects both the community-focused rationale for the employment component and the typical incompatibility of strategic logistics activity/operations with a predominantly residential context. Additional employment opportunities are identified through the provision of local centres, schools and community facilities, though these fall outside the ‘scoped in’ employment use classes for this assessment.

Implications for the mix of uses

6.18 The employment use mix at The Lattenburys will be shaped by the predominantly residential character of the overall scheme and the absence of a defined sector cluster role for the employment component. Within the employment element of the site, office and light industrial uses should account for the majority of floorspace, as these are most compatible with residential areas, whilst being capable of meeting the needs of a range of occupiers from small professional businesses to small-scale technical enterprises.

6.19 Light industrial provision also serves an important foundational economy function. New communities of the scale proposed at The Lattenburys will generate demand for everyday goods and services on which residents depend, including trades, maintenance, repair and small-scale production. Light industrial space is

[39] Moats Way Ltd, 2023. The Lattenburys vision and prospectus

well suited to accommodating these activities. Providing for them locally reduces the need for residents to travel elsewhere for services and aligns with principals of sustainable development.

6.20 Given the residential context, the proportion of general industrial relative to the E(g) uses is likely to be limited. Relative to the district-wide mix, The Lattenburys' employment component would be expected to have a substantially higher proportional share of E(g) uses and a more limited general industrial element.

Giffords Park

6.21 Information submitted by the promoters of Giffords Park, east of the B1040 at Needingworth, describes a mixed-use development on approximately 122 ha, incorporating around 1,750 homes. The employment component is approximately 5 ha of commercial and employment uses.[40].

6.22 Giffords Park does not have a defined sector cluster role. The employment function is described in terms of providing locally accessible employment for residents of the new community, and it will be important to achieve as the promoters have indicated **complementary rather than conflicting or duplicative employment uses**.

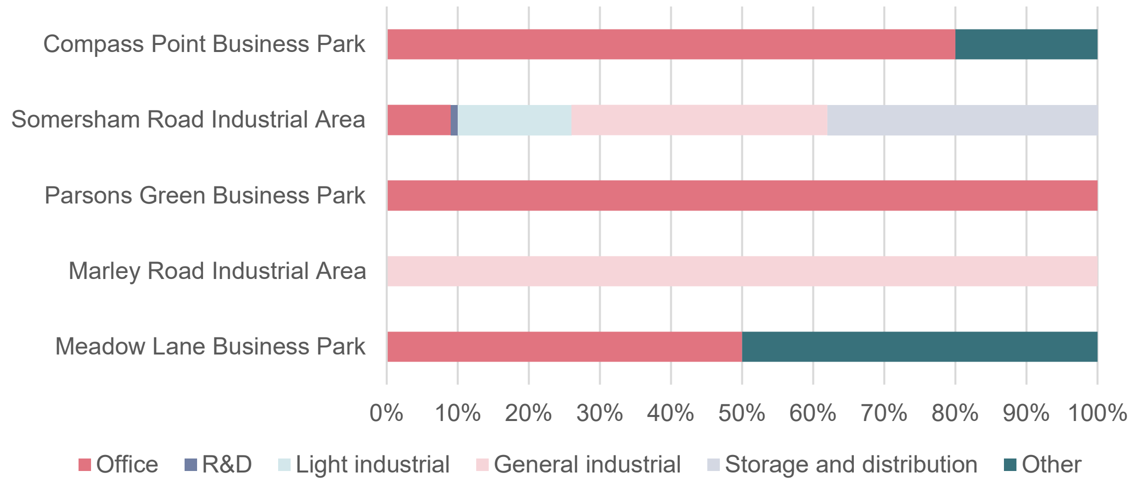
Implications for the mix of uses

6.23 In the absence of a specific sector focus, the employment mix at Giffords Park should be guided by compatibility with the predominantly residential context and complementarity with the existing St Ives employment base. **Figure 6-3** demonstrates the mix of uses across EEAs in St Ives, highlighting that office and other uses (such as retail and leisure) are the most appropriate components as they are compatible with residential areas and capable of serving a range of smaller occupiers across professional services. In the case of Marley Road Industrial Area and Somersham Road Industrial Area, industrial uses are located away from residential areas.

[40] Hallam Land, 2025. Gifford's Park, St, Ives Vision Document

Figure 6-3 – Precedent analysis is instructive for what an appropriate mix of uses to support a residential-led mix use development in St Ives might be

Proportion of floorspace by St Ives EEAs



Source: CoStar, 2026. Volterra analysis, 2026

6.24 Research and development accommodation may be appropriate where there is locally identified demand although it may be an effective approach to direct this kind of employment use development to clusters of existing/forthcoming activity of this nature. General industrial uses may be included in limited proportions where it can be placed with sufficient separation from residential areas to manage amenity impacts. At approximately 5 ha, the overall employment parcel is modest, and the practical scope for accommodating a meaningful B2 element alongside E(g) uses while maintaining adequate residential separation is constrained. As such, office and light industrial uses should be expected to account for the majority of floorspace.

Tithe Farm

6.25 Information submitted by the promoters of Giffords Tithe Farm (East of Loves Farm) describes a mixed-use development on approximately 100 ha, incorporating around 1,500 homes. The employment component is approximately 3.7 hectares, restricted to E(g) uses only.[41]

6.26 Tithe Farm does not have a defined sector focus in the information submitted by the promoters. The employment function is framed in terms of sustainable community development: **creating locally accessible employment opportunities for residents of the new community** and complementing the wider employment offer of St Neots.

Implications for the mix of uses

6.27 Tithe Farm is a sustainable urban extension (SUE) to St Neots. Best practice for SUE employment development indicates that mixed-use employment provision tends to be more resilient and effective than

[41] David Lock Associates, 2025. Representations on behalf of Urban&Civic Ltd in respect of St Neots East and Land East of Loves Farm (Tithe Farm)

single use delivery. Key benefits include greater economic resilience through the diversification of activities, broader employment generation across multiple sectors, improved placemaking, and a level of activity throughout the day that supports local services and creates more attractive, viable environments.[42] These principles are relevant to the design of the Tithe Farm employment parcel, even at relatively modest scale.

6.28 The restriction of the employment component to E(g) within the draft policy reflects the predominantly residential character of the site and the scale of the employment parcel. Within E(g), office and light industrial uses are the most appropriate components, given their compatibility with the residential setting and their capacity to serve smaller businesses across a range of activities. Research and development accommodation could be considered where there is demonstrable demand in the St Neots area, for example if the East West Rail corridor were to attract occupiers with a technology or knowledge-intensive profile. Incorporating a mix of uses within E(g) would support economic resilience and provide a more varied local employment offer, consistent with SUE best practice.

6.29 At 3.7 ha, the Tithe Farm employment parcel is the smallest of the five sites reviewed in this section. A focused use mix concentrated on office and light industrial accommodation is the most practical and coherent approach at this scale. A wide range of uses within a parcel of this size risks fragmenting the employment offer and undermining its attractiveness to occupiers. Within those constraints, a degree of diversity across E(g) uses remains desirable to support resilience and broaden the range of local employment opportunities available to residents of the new community.

Summary

6.30 The evidence in this section provide an initial basis for determining an appropriate employment use mix for strategic mixed-use sites. The recommended mix for each site should reflect its spatial context, its relationship to surrounding uses, and any defined sector or cluster role, guided by the principles set out at the start of this section. Across the five sites, office and light industrial uses are expected to account for the majority of employment floorspace. General industrial uses are appropriate in limited proportions on some sites where they can be separated sufficiently from residential development, and storage and distribution is excluded or restricted to ancillary functions on most sites given their predominantly residential character.

6.31 Precedent analysis is instructive for how strategic employment sites are configured. These use mix assumptions could be applied to the employment land quantum identified for each site in the emerging allocation policies to derive indicative floorspace estimates by use class. Those estimates would then be used to assess the contribution of strategic sites to overall employment land supply in Huntingdonshire. Where subsequent masterplanning work refines the net developable employment area on any of these sites, the use mix proportions recommended in this section should be revisited accordingly.

[42] Grace Donnelly, 2024. The economic impact of mixed-use developments on local communities

7. Conclusion and recommendations

7.1 The central finding of the addendum is that **the original assessment remains sound in principle but the precise results have been superseded/updated**. The preferred scenario, the methodology underpinning it, and the overall scale of identified need are confirmed. A modest upward revision to the need figures for several use classes arises from the updated housing assumptions, but this does not alter the fundamental direction of the assessment or the conclusions it supports.

7.2 The 2025 EENA identified an employment and economic evidence base for Huntingdonshire that characterised the district in terms of its high economic activity rates, a labour market in which many residents commute to higher-wage opportunities outside the district, and a commercial property market under sustained pressure from low vacancy, ageing stock and forthcoming tightening of minimum energy efficiency requirements. These conditions supported a strategy focused on protecting the existing employment land portfolio, expanding it through targeted new allocations, and enabling growth in innovative/high value sectors to diversify and upgrade the quality of the local employment base.

7.3 The addendum does not alter any of these findings. The district's economic profile and the strategic priorities remain as the original EENA described them, albeit recent policy developments through the CPCA LGP and increased emphasis on the emerging defence cluster in the NHGC further **confirm the ambitious underlying logic that underpins the preferred scenario**. The employment need identified should not be viewed as a maximum cap on the economic ambitions of the district, but a minimum defensible target for building an evidence-based employment land strategy.

7.4 The preferred scenario adopted in the 2025 EENA combines Scenario 2b for all ‘scoped in’ employment uses except storage and distribution, and Scenario 1b for storage and distribution. Scenario 2b provides the most realistic and balanced foundation for office, research and development, light industrial and general industrial uses, aligning job growth with labour supply growth from housing delivery and reflecting observed delivery patterns across these use classes. For storage and distribution, the evidence of persistently low vacancy rates, limited delivery relative to comparable corridor locations, strong take-up relative to supply, and significant infrastructure improvements on the strategic road network supported the more aspirational Scenario 1b trajectory that builds on and boosts the need implied through the labour demand logic in applicable sectors.

7.5 The strategic context for economic growth in Huntingdonshire has continued to develop since the 2025 EENA was prepared. The CPCA LGP and proposed reforms to the NPPF have together provided a strengthened and more explicit strategic framework for the district's economic ambitions, particularly in the defence, advanced manufacturing and logistics sector. The signing of the Statement of Intent between the Council and the MOD in December 2025, and the development of Project FAIRFAX at the Wyton Campus, represent **a material shift in the maturity and policy foundation of the defence cluster proposition since the 2025 EENA was prepared**. These developments reinforce the choice of the preferred scenario, and provide direct support for planning ambitiously for research and development, general industrial and storage and distribution uses over the plan period.

7.6 The role of the EENA is to think about the broad range of different ways need arises in Huntingdonshire, and provide evidence that takes into account these relationships in determining the preferred approach that speaks to the economic ambitions for Huntingdonshire within the wider FEMA area. For example, through supporting/balancing the range of innovation and ancillary activities articulated through ambitions around defence, advanced manufacturing and logistics.

Updated assessment of need

7.7 **Section 4** of this addendum updates the housing-led scenarios to reflect revisions to the Standard Method for local housing need. The 2025 EENA modelled scenarios 2a, 2b and 2c using a housing need figure of 1,214 dwellings per annum. The assessment has been updated to reflect the Council's approach of providing an appropriate margin above the minimum requirement to ensure flexibility of supply, are **1,355 dwellings per annum upon which the emerging Local Plan is based**, reflecting the 2025 Standard Method with a 10% buffer.

7.8 The Scenario 1b element of the preferred blend is not affected by the updated housing assumptions. The floorspace requirement of 433,000 sqm for storage and distribution is unchanged.

7.9 The Scenario 2b element of the preferred blend is subject to modest upward revision across all use classes. Under the assumption of 1,355 dwellings per annum, the increases relative to the 2025 EENA are approximately 8,000 sqm in office, approximately 1,000 sqm in research and development, approximately 7,000 sqm in light industrial, and approximately 18,000 sqm in general industrial. These are set out in detail below and in **Table 4-4** of this addendum.

7.10 The preferred scenario is associated with growth of **15,400 jobs** within 'scoped in' employment uses for the period of 2025-2046.

Table 7-1 – Revisions to the Standard Method (2025-based) result in a modest uplift in employment need in Huntingdonshire

Comparison between the employment need identified in the 2025 EENA and the updated figures based on the revised housing need figure of 1,355 dwellings per annum. The difference versus the 2025 EENA results is shown in brackets.

1,355 dwellings per annum	Change in jobs in 'scoped in' employment uses (FTE)	Floorspace target (sqm)	Land target (ha)
Office	5,600 (+600)	121,000 (+8,000)	18.0 (+1.2)
Research and development	300 (+/- 0)	47,000 (+1,100)	5.7 (+0.1)
Light industrial	1,300 (+100)	113,000 (+7,000)	23.6 (+1.5)
General industrial	4,400 (+400)	242,000 (+18,000)	80.6 (+6.0)
Storage and distribution	3,800 (+/- 0)	433,000 (+/- 0)	110.9 (+/- 0)
Total	**15,400** **(+1,000)**	**955,000** **(+33,000)**	**239** **(+9.0)**

Source: Volterra analysis, 2026. Figures may not sum due to rounding.

7.11 The outputs under 1,362 dwellings per annum are nearly identical, differing from the 1,355 figure by no more than 1,000 sqm in any individual use class, as set out in **Table 4-5**. In several use classes, the proportionate increase in floorspace need falls below the proportionate increase in the housing need figure, reflecting the structure of the labour supply modelling.

7.12 The updated preferred scenario produces a **total net floorspace requirement of approximately 956,000 sqm**. In land terms, both assumptions produce a requirement of approximately 239 ha.

7.13 The gap analysis presented in **Section 5** of this addendum compares the updated preferred scenario need against the latest committed pipeline of employment floorspace. The updated pipeline, reflecting the position at 2025, totals approximately 429,000 sqm net across all five scoped-in use classes. Against the identified need of approximately 956,000 sqm, the committed pipeline across the five 'scoped in' use classes is approximately 429,000 sqm, equivalent to approximately 45% of identified need. **The residual gap between identified need and committed pipeline is approximately 591,000 sqm**. These figures confirm that a substantial programme of additional employment land allocation is required to provide confidence that the identified need can be met over the plan period.

7.14 The contribution of the pipeline to meeting identified need will be lower than the headline total, given that some outline and unimplemented permissions will lapse without implementation and others may come forward at a different scale to that originally envisaged. It is necessary that the allocation requirement is correspondingly larger than the residual gap figures alone would imply and/or that policies are in place to provide flexibility to bring forward additional land where required through supporting appropriate development in suitable locations. The monitoring framework described in the recommendations below is designed to ensure that the supply position is tracked systematically and that HDC is in a position to respond if delivery diverges materially from the preferred scenario trajectory.

Recommendations

7.15 The analysis conducted for the purposes of this addendum does not alter the overall nature of the recommendations set out in Chapter 16 of the 2025 EENA. Refinements and additions arising from the addendum evidence are set out below.

Ensure a flexible and sufficient supply of employment land

7.16 The updated assessment confirms a net requirement of approximately **956,000 sqm** of additional employment floorspace, equivalent to approximately **239 hectares**, over the plan period to 2046. This represents a modest increase relative to the 2025 EENA, and it underlines the importance of ensuring that the employment land strategy is grounded in a supply of allocated and safeguarded land sufficient to accommodate the full scale of identified need, with a margin included to allow the market to function efficiently. **The committed pipeline provides a meaningful but uncertain contribution**. The allocation strategy should bear in mind that the pipeline would unlikely come forward in full and the residual gap should be treated as a minimum.

7.17 The distribution of need across use classes points to priorities for allocation: general industrial and storage and distribution uses together account for approximately 70% of the total net floorspace requirement and both show large residual gaps relative to the committed pipeline. Sites with good access to the strategic road network and the physical capacity to accommodate larger scale development should be a core consideration in the allocation strategy for these uses.

7.18 The allocation portfolio should also continue to include sites of a range of scales and locations. Small and medium-sized enterprises account for a significant share of employment in the district and have accommodation requirements that differ from those of strategic logistics operators and large manufacturers. Concentrating the allocation strategy wholly on large scale sites would not adequately serve this segment of demand and would introduce a risk of over-reliance on a small number of strategic locations, which the 2025 EENA identified as a concern.

Maintain and strengthen protections for the existing employment land portfolio

7.19 The existing portfolio of EEAs makes a substantial contribution to the district's employment land supply, accommodating well over half of the total employment floorspace in the district. Low vacancy rates and the approaching wave of functional obsolescence arising from minimum energy efficiency standards confirm that the protection and renewal of this stock remains a priority. Proposals for redevelopment and intensification that deliver modern premises with improved environmental performance should continue to be supported. Pressure to convert established employment land to non-employment uses should continue to be resisted where it would undermine the critical mass of provision needed to sustain viable business communities, bearing in mind that the market depends on a degree of available vacancy to allow businesses to move, expand and invest.

Support the defence, advanced manufacturing and logistics growth ambitions

7.20 The **strengthened strategic context** documented in **Section 3** of this addendum **provides direct support for the preferred employment land strategy**. The defence and innovation cluster centred on RAF Wyton, given formal expression through Project FAIRFAX and the Statement of Intent between the Council and the MOD, represents an opportunity for knowledge-intensive research and development and office-based employment of national significance. The employment land strategy should ensure that sufficient capacity exists in appropriate locations to accommodate the research and development and office uses that this cluster requires, alongside the light industrial and general industrial uses associated with advanced manufacturing and dual-use technology activity. The aspirational growth trajectory set for general industrial uses through Scenario 2b reflects the district's above average concentration of manufacturing employment, the growth potential identified in the CPCA LGP, and the strategic case for Huntingdonshire's role as the primary location within the CPCA area for production and scale-up activity in advanced manufacturing.

7.21 For storage and distribution, the combination of strategic road network connectivity, evidence of accumulated unmet demand, and the district's established and regionally significant role as a supplier of industrial and logistics floorspace across the CPCA area collectively confirm the appropriateness of planning for the Scenario 1b trajectory for this use class. A substantial programme of strategic site allocation is required to provide confidence that this level of need can be met and that the conditions for sector growth are in place over the plan period.

Establish a clear monitoring and review framework

7.22 The gap analysis provides a snapshot assessment of the relationship between identified need and committed supply. That position will evolve over the plan period as permissions are implemented, new consents are granted, allocations come forward and floorspace is lost from the stock. HDC should maintain the framework for monitoring the delivery of employment floorspace and for assessing on a regular basis whether the trajectory of delivery remains consistent with the preferred scenario.

7.23 Annual monitoring, drawing on the business completions and commitments dataset as the primary source of evidence, should track net completions by use class, changes to the committed pipeline, and market indicators including vacancy rates and rental values. **Section 5** of this addendum sets out a number of specific circumstances that would each warrant consideration of whether an earlier review of the employment land evidence base is appropriate before the next scheduled five-year review. These include sustained under-delivery of general industrial or storage and distribution floorspace relative to the preferred scenario trajectory and/or the committed pipeline without equivalent replacement by new permissions, any significant revision to the housing need figure, and persistent over-performance of storage and distribution take-up relative to the Scenario 1b trajectory. Where sustained over-performance is identified, the Council should assess whether the allocation strategy remains sufficient to meet the residual need and whether additional sites should be considered to be suitable.

7.24 Homes England has commissioned an update to the HCA Employment Density Guide. When that update is published, the Council should review whether revised benchmarks would materially affect the floorspace requirements derived from the tested scenarios and whether any adjustment to the evidence base is warranted ahead of the next formal five-year review.

Support inclusive growth and the rural economy

7.25 The recommendations in the 2025 EENA on upgrading and greening the existing employment stock, on supporting innovation-led cluster growth through conditions that allow firms to start, grow and collaborate in high value sectors, and on supporting the rural economy through diversification and improved access to employment, remain valid and echoed at time of preparation of the addendum. The analysis carried out in this addendum does not generate new evidence that requires these recommendations to be altered. Ensuring that employment growth of different types and scales can come forward across a range of locations, supported by appropriate skills, infrastructure and accessibility conditions, remains an important consideration for the employment land strategy throughout the plan period. The Huntingdonshire Economic Growth Strategy's ambition for an **economy that is flexible and contributes to national growth priorities, that celebrates enterprise, and that ensures residents have the skills to participate in the economy**, provides the broader context within which the employment land evidence base should continue to be applied and monitored.

Contact Us

volterra.co.uk

info@volterra.co.uk

020 4529 1736

Unit 2.02
91-94 Lower Marsh
London
SE1 7AB

Picture credit: New houses and new street at Alconbury Weald, Huntingdon by Richard Humphrey