BRENTWOOD ECONOMIC STATEMENT, JANUARY 2017

This statement is based on the recent findings of the Enterprising Essex: Opportunities and Challenges report undertaken by the Essex Economic Commission.

Where available data at Brentwood level has been included but for some of the economic indicators data is only available at sub-regional level. For Brentwood, this is presented as the Heart of Essex sub-region/growth corridor.

The key trends for Brentwood are highlighted below. Supporting statistical tables are provided in the Annex.

1. Economic growth

- The Heart of Essex sub-region which includes Brentwood, accounts for just over a fifth of the county's GVA (21%) and has experienced the fastest growth in Essex at 1% per annum.
- For Greater Essex, the Gross Value Added (GVA) per head is highest in the Heart of Essex region at £24,300 per head. (Table 1).
- Long term economic forecasts indicate that Greater Essex region will be 2% per annum for the next 20 years. To aspire to be one of the higher performing regions in the UK this will need to increase to 3% per annum.

2. Sector performance

- The fastest growing sectors for Heart of Essex are information and communication, business services, real estate activities and other services/household activities.
- Manufacturing is the only sector to have declined (-1.3%). However it has the opportunity to grow via advanced manufacturing, taking advantage of enabling technologies and translating innovation in these technologies into growth, maximising export opportunities and adapting to low carbon technologies.
- Financial and insurance services grew by 1% in Heart of Essex and the distribution, transport and accommodation sector by 1.6%. (Table 2).
- Other sectors which are also regarded as important as the population grows include wholesale and retail services, education, construction, tourism and food production.
- Over the 15 years to 2013, growth in Greater Essex has been slower than the UK average for five of the fastest growing sectors which include information and communication services; professional, scientific and technical services; administrative and support services; real estate; and financial and insurance services.

3: New enterprises - start ups and survival

- According to the Office of National Statistics (ONS), Brentwood has 4050 businesses, 19% of which are in professional, scientific and technical sector; 15% in construction; 10% in information and communication; 9% in business administration and support services. (Table 3)

- In 2009 Brentwood had 370 business start-ups of which 89% survived one year and 39% at least 5 years compared to national figures of 90.8% and 41.7% respectively. (Table 4).

- Only Harlow, Maldon, Rochford and Castlepoint have lower start-ups numbers than Brentwood, the other local authorities in Essex had more.

- The one year survival rate for Brentwood at 89% is also the lowest in Greater Essex and the five year rate is only slightly better than Epping Forest and Harlow. There is therefore a need to increase business start-ups and improve their survival rates in Brentwood.

- Overall Greater Essex has a strong record in start-ups but this has not resulted in faster economic growth or accelerated productivity growth. Greater Essex lags neighbouring counties and UK generally in real GVA growth. Modest productivity growth is only slightly ahead of the UK. Start-ups in Greater Essex tend to be more heavily concentrated in low value added services, such as construction and ancillary services.

4: Labour market

Three key measures of employment and lack of employment are the participation rate; economic inactivity rate and the unemployment rate.

- According to ONS, 38,479 people were employed in Brentwood Borough in 2015 representing 4.4% of those employed in Greater Essex. (Table 5)

- The participation rate includes those people aged 16-64 that are employed as a share of the workforce in that age range, excluding those in full time education. This was 78.5% for the Heart of Essex compared to 76% in Greater Essex and 73.5% in the UK.

- Within Greater Essex, the highest rates of inactivity can be found in Tendring 26.5%, Maldon 25% and Epping Forest 23% (Table 18). Brentwood has the lowest council economic inactivity rates at 15% compared to the highest in Tendring being 26.5%. (Table 6).

- Brentwood also has one of the lowest unemployment rates (3.2%) in Greater Essex compared to the highest unemployment rates in Harlow 6.4%, Thurrock 6.2% and Tendring 5.7%.

- Within Greater Essex, the areas with the larger share of high level occupations are to be found in Brentwood, Maldon and Chelmsford, the three boroughs in the Heart of Essex, with around a half of people employed in the highest three grades of occupation.

5. Productivity

Productivity at the whole economy level is a measure of how much output is generated by each person employed. In order to adjust for differences in work patterns – given he range in hours worked by people in employment – productivity can also be measured as output per hour worked (GVA per person employed).

- For Greater Essex, GVA per person was highest in Heart of Essex (which includes Brentwood), West Essex and Essex Thames Gateway at £54,000 compared to the lowest in Southend at £45,000 and in other regions Berkshire (£71,000) and Surrey, Buckinghamshire and Hampshire (£60,000).

- The sectors in the Heart of Essex with the highest GVA per person are financial and insurance (£94,000), business service activities including real estate (£77,000) and construction (£80,000). The lowest GVA per person is in public sector dominated services such as education, health and public administration (£33,000).

6. Qualifications and skills

- Within Greater Essex the respective shares of people with higher level occupational employment and qualifications are shown in Table 7. Boroughs with a greater share of better qualified staff with higher level occupations include Brentwood, Maldon, Chelmsford and Epping Forest.

- Brentwood has the second highest number of people with at least NVQ level 4 at 33%, slightly behind Uttlesford at 38%. The lowest is Castlepoint at 19%. (Table 8)

- There were 14,580 apprenticeships in Greater Essex in the year to July 2015, accounting for 3.0% of total 494,200 apprenticeships in England). Apprenticeships are spread relatively evenly across Greater Essex, with the lowest shares in, Brentwood (0.59% of the population) Epping Forest, Uttlesford and Chelmsford and slightly more apprenticeships per capita in Harlow (0.9%) and Braintree (0.89%). (Table 9).

7. Population, migration and commuting

- According to ONS, Brentwood's population has increased by 8% from 70,500 in 2005 to 76,100 in 2015. (Table 10). 61% are between 16-64 years; 19% between 0-15 years and 20% are 65 years or more. This is a similar distribution to the rest of Greater Essex area.

- All local authorities saw a net outflow of commuters to work. Brentwood had between 88 and 99 commuters travelling into the borough to work for every 100 commuters going out. It therefore had a net flow (difference between inflow and outflow) of 1,713 between 2011-2015. (Table 11)

- The key conclusion to be drawn from commuter flows is that Greater Essex is not disadvantaged any more than other counties surrounding central London, in the scale of the outflow of commuters into London. This factor therefore does not appear to be a significant contributor to lower growth and lower productivity in Greater Essex.

8. Infrastructure

Commercial space and premises

- Many local authorities in Greater Essex have articulated concerns about inadequacies of supply and quality of commercial premises, particularly good quality office accommodation of the right size. Larger new developments, including business parks, have a crucial role to play in meeting demand. These form part of the solution but not the whole solution.

- In Brentwood it is recognized that the majority of supply of employment space over the period to 2030 is likely to come from Brentwood Enterprise Park which at 23.4 hectares will supply 65% of proposed new supply. West Horndon and Dunton Hills developments will also help supply employment land to meet demand. A total of 8 sites over 1,000 sq.metres capacity are identified within Brentwood (Table 12)

- The availability of office space in Essex has declined by 59% from 1.75m square feet in 2013 to 20,000sq.ft during 2016, with the availability rate at just 4%, the lowest in the region. The drop in office availability has been driven by a rise in office take up from 200,000 sq. ft. in 2013 to 500,000 in 2015.

- Availability of industrial space in Essex has also dropped by 61% from 6.6 sq.ft. to 2.5m sq.ft. in 2013 leaving the availability rate at just 3.3% in 2016.

- The current shortage of suitable commercial workspace of the right size and quality is a constraint on the ability to attract, retain and growth the businesses that will generate faster growth.

Housing

- For Brentwood, assessed housing need (7,200) is greater than the estimated supply (6,500). There is therefore a need to ensure the future LDP identifies options to accommodate the shortfall. (Table 13)

Broadband

- 65% of commercial premises in Brentwood borough have access to superfast broadband. This is compared to 96% in Chelmsford and 41% in Saffron Walden. Essex has 76% coverage as opposed to 83% for the UK. There is therefore a need to increase coverage in Brentwood.

Transport

- A range of road and rail infrastructure projects which will bring economic benefits to Brentwood are being progressed and lobbied for through SELEP, Essex County Council and Highways England including improvements to A12, A127, M25/J8, Lower Thames Crossing, Crossrail.

9. Brentwood and Greater Essex as location for investment

- Key factors driving UK and foreign companies to invest in Greater Essex include the proximity to London; proximity to the London-Stansted-Cambridge corridor; cost advantages related to employment and property and access to UK, European and international markets.

- However investment has been constrained due to a lack of awareness of Greater Essex, particularly outside the UK and due to the shortage of commercial workspace of the right size and quality.

- Invest Essex work to attract new businesses and retain existing businesses and can provide a service to local authorities to guide and support businesses through every stage of business relocation or expansion project.

- Since March 2013, Invest Essex has successfully landed 182 projects that have resulted in investment in a new location in Greater Essex with job creation. 153 of these were new investments by UK companies; the other 29 were from a range of countries including the USA, India, Germany, Ireland, Italy, Spain, Australia, New Zealand, China and Europe. The greatest number of successes were in the business and financial services sector followed by ports and logistics and high technology sectors

10. Quality of life

- Brentwood (294th) and Uttlesford (297th) are among the least deprived local authorities in Greater Essex (Table 14)

- Average income in Brentwood is over £600 per week and the share of children in households claiming out-of-work benefits is lowest at 6%.

Annex to Brentwood Economic Statement, January 2017

Table 1

Gross value added & disposable income per head of population				
2014, current basic prices	**Gross value added per head**		**Gross disposable household income per head**	
	£ per head	**UK=100**	**£ per head**	**UK=100**
London	42,666	***171***	23,607	***131***
West Yorkshire	20,808	***83***	15,188	***85***
Greater Manchester	21,002	***84***	15,131	***84***
Merseyside	18,621	***75***	15,106	***84***
West Midlands	19,778	***79***	14,139	***79***
UK	***24,958***	***100***	***17,965***	***100***
Berks, Bucks & Oxfords.	34,230	***137***	21,038	***117***
Surrey & Sussex	26,384	***106***	22,027	***123***
Bedfords & Herts.	25,791	***103***	20,666	***115***
Hampshire	25,578	***102***	19,160	***107***
Cambs, Suffolk & Norfolk	23,115	***93***	17,741	***99***
Greater Essex	**20,224**	***81***	**18,697**	***104***
Kent	20,096	***81***	18,518	***103***
Heart of Essex	24,300	***97***	20,115	***112***
West Essex	22,463	***90***	20,326	***113***
Essex Thames Gateway	19,585	***78***	18,260	***102***
Essex Haven Gateway	18,592	***74***	18,300	***102***
Thurrock	18,056	***72***	16,157	***90***
Southend-on-Sea	16,955	***68***	17,751	***99***
Source: ONS Gross Disposable Household Income, Regional Gross Value Added				

Table 2

Sector growth in Greater Essex Growth Corridors							
					of which:		
Real GVA, 1998-2013, % annual average change	Heart of		Haven		*Thames*		
	Essex	W. Essex	Gateway	S. Essex	*Gateway*	*Southend*	*Thurrock*
Agriculture, forestry and fishing	0.3	-0.9	2.0	0.9	*0.0*	*1.3*	*3.3*
Manufacturing	-1.3	-2.0	-0.7	-2.6	*-0.6*	*-1.0*	*-7.8*
Construction	0.6	0.7	0.3	0.4	*0.7*	*-0.2*	*0.0*
Distribution; transport; accommodation and fo	1.6	1.3	1.1	0.8	*1.7*	*-0.3*	*0.3*
Information and communication	7.0	5.9	6.8	5.0	*7.6*	*3.2*	*0.1*
Financial and insurance activities	1.0	2.7	-1.2	-3.0	*-1.1*	*-6.4*	*-1.3*
Real estate activities	2.7	3.0	2.8	2.8	*3.0*	*2.5*	*2.8*
Business service activities	4.7	3.3	4.4	4.2	*4.6*	*3.5*	*4.6*
Public administration; education; health	2.6	2.8	2.0	2.1	*2.2*	*1.5*	*2.8*
Other services and household activities	2.7	2.4	1.9	2.4	*2.7*	*1.5*	*3.0*
Total for growth corridor	**2.0**	**1.8**	**1.6**	**1.0**	***1.8***	***0.9***	***-0.4***
Source: ONS Regional Gross Value Added 2014							

Table 3

Enterprises															
Number of enterprises															
	Southend	Thurrock	Basildon	Braintree	Brentwood	Castle Point	Chelmsford	Colchester	Epping For.	Harlow	Maldon	Rochford	Tendring	Uttlesford	Greater Essex
Agriculture, forestry & fishing	20	40	40	**405**	85	15	240	245	240	5	215	75	270	**370**	2205
Production	355	285	**500**	**485**	200	220	360	380	365	195	280	250	295	330	3860
Construction	945	970	**1340**	1105	620	750	1115	1015	**1340**	485	555	670	705	690	10390
Motor trades	180	**225**	205	**225**	105	100	**250**	220	175	90	110	130	190	160	1960
Wholesale	240	220	**365**	335	180	100	300	275	**370**	185	140	145	150	230	2775
Retail	**675**	345	410	360	280	240	450	**510**	**510**	155	215	240	390	290	4050
Transport & Storage (inc. postal)	145	**555**	**305**	230	110	145	220	175	210	185	135	145	185	170	2215
Accommodation & food services	**445**	245	230	290	160	150	335	**345**	290	110	195	145	340	195	2785
Information & communication	**560**	365	530	410	405	200	**665**	515	490	200	165	235	190	380	4385
Finance & insurance	**165**	55	125	65	105	50	**170**	140	140	30	55	55	40	100	1075
Property	255	110	160	195	135	90	**270**	245	**380**	65	110	90	120	175	2035
Professional, scientific & technical	1060	680	1105	1040	795	435	**1385**	1105	**1135**	320	510	585	465	985	9865
Business administration & support services	560	375	545	500	380	220	**600**	535	**635**	200	250	245	300	430	4840
Public administration & defence	5	0	5	50	5	0	25	25	15	0	20	10	25	**40**	220
Education	105	90	105	110	65	55	**135**	**130**	105	55	40	55	80	100	1035
Health	**350**	270	280	210	160	100	290	**355**	215	120	95	95	215	155	2290
Arts, entertainment, recreation & other servs.	415	235	330	425	260	165	**435**	405	**465**	150	180	215	270	290	3590
SIC07: Total	**6480**	**5065**	**6580**	**6440**	**4050**	**3035**	**7245**	**6620**	**7080**	**2550**	**3270**	**3385**	**4230**	**5090**	**59575**
Source: ONS 'UK Business - Activity, Size and Location'															

Table 4

Survival rates in growth corridors			
		% survival rate	
	Births in 2009	*1 year*	*5 year*
West Essex			
Uttlesford	515	*94.2*	*41.7*
Epping Forest	745	*90.6*	*38.9*
Harlow	275	*94.5*	*38.2*
Essex Haven Gateway			
Tendring	385	*96.1*	*50.6*
Colchester	675	*91.9*	*47.4*
Braintree	635	*93.7*	*41.7*
Heart of Essex			
Maldon	275	*92.7*	*49.1*
Chelmsford	720	*93.1*	*45.1*
Brentwood	370	*89.2*	*39.2*
Essex Thames Gateway			
Rochford	300	*95.0*	*50.0*
Castle Point	310	*91.9*	*43.5*
Basildon	695	*94.2*	*41.7*
Source: ONS Business Demography 2014			

Table 5

Employment in local authorities in Greater Essex			
2015		Total employment	*% of Greater Essex total*
Essex Haven Gateway	Tendring	53,777	*6.2*
	Braintree	79,251	*9.1*
	Colchester	94,581	*10.9*
Heart of Essex	Maldon	32,481	*3.7*
	Chelmsford	86,275	*9.9*
	Brentwood	38,479	*4.4*
West Essex	Epping Forest	62,897	*7.2*
	Uttlesford	40,995	*4.7*
	Harlow	41,390	*4.8*
South Essex	Thurrock	78,295	*9.0*
	Rochford*	41,896	*4.8*
	Basildon*	87,761	*10.1*
	Southend	86,752	*10.0*
	Castle Point*	45,585	*5.2*
G. Essex		870,415	*100.0*
Essex CC		705,368	
*Essex Thames Gateway			
Source: ONS Nomis			

Table 6

Inactivity & unemployment in Greater Essex			
% of total workforce, 2015		Inactivity	Unemplymt.
Essex Haven	Tendring	26.5	5.7
Gateway	Braintree	17.9	4.0
	Colchester	17.6	3.7
Heart of Essex	Maldon	25.1	4.2
	Chelmsford	18.0	4.4
	Brentwood	15.2	3.2
West Essex	Epping Forest	22.9	4.3
	Uttlesford	19.9	2.8
	Harlow	19.3	6.4
South Essex	Thurrock	21.7	6.2
	Rochford*	20.7	3.3
	Basildon*	20.0	4.9
	Southend	19.6	5.2
	Castle Point*	17.3	4.4
G. Essex		20.0	4.3
Essex CC		19.8	
*Essex Thames Gateway			
Source: ONS Nomis			

Table 7

All Further Education and Skills Learners							
Students resident in local authority, 2012/13							
		Levels*			Total	**Total**	***% share of***
Growth	Local	Up to Level 2	Level 3	Level 4 & above	number of	**students**	***local populn.***
corridor	authority	------------------*% share of courses*------------------			courses	**number**	
West Essex	Epping Forest	*69.1*	*30.2*	*0.7*	12,020	**6,470**	***5.0***
	Harlow	*72.5*	*27.0*	*0.5*	13,140	**6,700**	***7.8***
	Uttlesford	*68.4*	*30.7*	*0.9*	6,520	**3,480**	***4.1***
Essex Haven Gatewa	Braintree	*69.1*	*30.3*	*0.6*	18,280	**9,550**	***6.3***
	Colchester	*66.1*	*33.2*	*0.8*	25,280	**13,930**	***7.6***
	Tendring	*73.8*	*25.6*	*0.7*	18,370	**10,280**	***7.3***
Heart of Essex	Brentwood	*69.3*	*29.9*	*0.8*	6,260	**3,570**	***4.7***
	Chelmsford	*71.8*	*27.6*	*0.7*	17,600	**8,860**	***5.1***
	Maldon	*70.0*	*29.5*	*0.5*	6,070	**3,240**	***5.2***
South Essex	Basildon	*72.2*	*27.1*	*0.7*	23,600	**12,260**	***6.7***
	Castle Point	*65.7*	*33.6*	*0.6*	10,860	**5,510**	***6.2***
	Rochford	*64.6*	*34.6*	*0.8*	8,520	**4,310**	***5.1***
	Southend	*72.0*	*26.7*	*1.2*	22,480	**12,770**	***7.1***
	Thurrock	*68.4*	*31.0*	*0.6*	22,690	**11,970**	***7.2***
Total G. Essex		***69.8***	***29.5***	***0.7***	211,690	**112,900**	***6.3***
Total England		*72.9*	*26.4*	*0.7*	7,777,600	**4,320,300**	**7.9**
*Many students are included in more than one course, so number of courses being taken exceed number of students							
Source: Skills Funding Agency & Department for Business Innovation & Skills							

Table 8

Share of workforce reaching at least Level 4			
% share in age group 16-64			
			Change in
			% share
West Essex	**2005**	**2015**	*2005-2015*
Uttlesford	38.1	38.2	*0.1*
Epping Forest	20.6	35.0	*14.4*
Harlow	17.5	20.9	*3.4*
Heart of Essex			
Maldon	13.9	35.4	*21.5*
Chelmsford	31.5	33.7	*2.2*
Brentwood	33.5	32.5	*-1.0*
Essex Haven Gateway			
Colchester	23.9	32.5	*8.6*
Braintree	24.3	27.5	*3.2*
Tendring	18.9	19.4	*0.5*
South Essex			
Basildon	16.7	28.9	*12.2*
Southend-on-Sea	19.1	26.0	*6.9*
Rochford	16.7	25.1	*8.4*
Thurrock	16.6	24.3	*7.7*
Castle Point	7.7	19.0	*11.3*
G. Essex	22.2	29.2	*7.0*
Source: ONS NOMIS			

Table 9

Apprenticeships			*% of local*
Year to July	2011/12	2015/16	*populatn.*
			2015/16
Suffolk	6400	6320	*0.85*
G. Essex	14410	14480	*0.81*
Kent	13920	13830	*0.77*
Norfolk	7640	7630	*0.86*
Cambridgeshire	5890	5970	*0.71*
Surrey	5960	5710	*0.49*
England Total	515000	498000	*0.92*
Heart of Essex			
Chelmsford		1090	*0.64*
Brentwood		450	*0.59*
Maldon		540	*0.86*
West Essex			
Epping Forest		840	*0.65*
Harlow		810	*0.96*
Uttlesford		520	*0.62*
Essex Haven Gateway			
Braintree		1330	*0.89*
Colchester		1450	*0.80*
Tendring		1560	*1.11*
South Essex			
Basildon		1620	*0.90*
Castle Point		800	*0.90*
Rochford		670	*0.79*
Thurrock	1270	1390	*0.85*
Southend on Sea	1220	1410	*0.79*
Greater Essex	**14410**	**14480**	*0.82*
Essex CC	11920	11680	*0.82*
Source: Skills Funding Agency and			
Department for Business, Innovation & Skills			

Table 10

Population estimates for Greater Essex							
							Popn change
	Total	**Total**	*--------Age range, % of total, 2015-----------*				***2005-15***
	2005	**2015**	***0 - 15***	***16-64***	***65+***	***Total***	***% change***
Tendring	140300	141,200	*16*	*54*	*29*	*100*	***1***
Braintree	139200	150,400	*19*	*62*	*19*	*100*	***8***
Colchester	162000	183,900	*19*	*64*	*17*	*100*	***14***
Essex Haven Gatew	*441500*	*475,500*	*18*	*60*	*21*	*100*	***8***
Maldon	60700	62,700	*17*	*60*	*24*	*100*	***3***
Chelmsford	163600	172,600	*19*	*63*	*19*	*100*	***6***
Brentwood	70500	76,100	*18*	*61*	*20*	*100*	***8***
Heart of Essex tota	*294800*	*311,400*	*18*	*62*	*20*	*100*	***6***
Epping Forest	121700	129,700	*19*	*62*	*20*	*100*	***7***
Uttlesford	71600	85,100	*20*	*61*	*19*	*100*	***19***
Harlow	78400	85,400	*22*	*63*	*15*	*100*	***9***
West Essex total	*271700*	*300,200*	*20*	*62*	*18*	*100*	***10***
Thurrock	148600	165,200	*22*	*64*	*14*	*100*	***11***
Rochford*	80800	85,100	*17*	*60*	*23*	*100*	***5***
Basildon*	168900	181,700	*20*	*63*	*17*	*100*	***8***
Southend	162600	178,700	*19*	*62*	*19*	*100*	***10***
Castle Point*	87500	89,200	*16*	*59*	*25*	*100*	***2***
South Essex total	*648400*	*699,900*	*20*	*62*	*18*	*100*	***8***
G. Essex	**1,656,400**	**1,787,000**	***19***	***62***	***19***	***100***	***8***
Essex CC	1,345,200	1,443,200	19	61	20	100	***7***
Source: ONS Nomis							

Table 11

Internal migration: inflows and outflows to local authorities									
July 2011-June 2015, aggregated flows over four years					**------------------net flow by age---------------**				
		Inflow	**Outflow**	**Net flow**	**0-14**	**15-24**	**25-44**	**45-64**	**65+**
Essex Haven Gateway	Tendring	26407	20555	**5852**	**1290**	-1400	**1020**	**2970**	**1490**
	Colchester	39862	36318	**3545**	**1050**	**1170**	**1590**	**540**	**180**
	Braintree	27413	26407	**1006**	**90**	-1170	**1050**	**390**	**720**
Heart of Essex	Brentwood	17182	15469	**1713**	**730**	-440	**1550**	-290	**60**
	Maldon	12234	11097	**1138**	**460**	-770	**460**	**680**	**370**
	Chelmsford	32052	31695	**357**	**750**	-880	**1020**	-940	**40**
West Essex	Uttlesford	20632	16962	**3670**	**1500**	-1130	**2290**	**450**	**380**
	Epping Forest	30460	28183	**2277**	**510**	-290	**2280**	-190	**120**
	Harlow	14231	14942	-712	**10**	-230	**360**	-440	-240
South Essex	Southend	32658	30415	**2243**	**90**	-190	**1350**	**370**	**660**
	Basildon*	31125	28826	**2299**	**680**	-490	**2470**	-380	-290
	Rochford*	16337	14577	**1760**	**990**	-510	**1160**	**300**	**30**
	Castle Point*	16070	14477	**1594**	**960**	-560	**300**	**390**	**400**
	Thurrock	27534	26564	**969**	**770**	-460	**1830**	-680	-470
*Essex Thames Gateway									
Source: ONS Internal migration, England and Wales (Statistical Bulletin)									

Table 12

Commercial workspace						
Number of larger employment sites with over 1,000 sq.metres capacity						
	Business Park	Industrial	Mixed use	Office	Science Park	**Total**
Essex Haven Gateway						
Colchester	5	6	0	2	1	**14**
Tendring	0	9	2	0	0	**11**
Braintree	1	0	8	1	0	**10**
Heart of Essex						
Chelmsford	2	3	6	0	0	**11**
Brentwood	2	2	4	0	0	**8**
Maldon	0	0	5	0	0	**5**
West Essex						
Uttlesford	0	9	3	2	1	**15**
Harlow	0	0	1	0	2	**3**
Epping Forest	0	0	0	0	0	**0**
South Essex						
Thurrock	0	26	3	0	0	**29**
Basildon	1	2	11	2	1	**17**
Rochford	1	9	0	0	0	**10**
Southend	0	1	5	0	0	**6**
Castle Point	2	1	0	0	0	**3**
G. Essex	**4**	**48**	**23**	**4**	**4**	**83**
*Excludes retail space. Includes sites with permissions, allocations and existing sites with capacity						
Source: Local authority data, excludes retail sites.						

Table 13

Housing demand and supply			
Thousands, 2016-2036			
	Assessed need	**Estimated supply**	***Supply as % of need***
Essex Haven Gateway			
Colchester	18.4	15.0	*82*
Tendring	11.6	10.4	*90*
Braintree	16.9	16.3	*96*
Heart of Essex			
Chelmsford	15.5	18.6	*120*
Brentwood	7.2	6.5	*90*
Maldon	6.2	4.9	*79*
West Essex			
Uttlesford	11.4	5.5	*48*
Harlow	5.4	7.8	*145*
Epping Forest	10.3	12.5	*122*
South Essex			
Thurrock	20.0	10.6	*53*
Basildon	17.1	13.5	*79*
Rochford	8.0	3.2	*39*
Southend	23.3	5.9	*25*
Castle Point	8.5	2.0	*24*
G. Essex	**179.7**	**132.6**	***74***
Source: Local authority data			

Table 14

Index of Multiple Deprivation (IMD)											
Average ranks out of 326 local authority districts											
1 Least deprived, 326 most deprived											
			Indicators of deprivation							**Deprivation of groups**	
	IMD overall	***Decile****	**Income**	**Employmt.**	**Education skills & training**	**Health**	**Crime**	**Barriers to housing & services**	**Living environmt.**	Children	65+ age group
Heart of Essex											
Brentwood	**294**	***10***	278	272	259	298	156	206	301	268	284
Chelmsford	**261**	***9***	245	248	221	276	190	131	231	224	267
Maldon	**204**	***7***	204	205	80	248	245	162	188	195	202
West Essex											
Uttlesford	**297**	***10***	304	320	268	322	252	45	233	310	280
Epping Forest	**199**	***7***	191	220	141	239	73	136	194	176	185
Harlow	**71**	***3***	57	83	21	74	54	37	316	56	68
Essex Haven Gateway											
Braintree	**197**	***7***	181	189	102	240	227	64	246	186	157
Colchester	**185**	***6***	174	183	180	154	141	121	227	154	204
Tendring	**49**	***2***	40	24	14	61	100	261	163	38	86
South Essex											
Rochford	**285**	***9***	260	256	115	297	240	213	300	263	241
Castle Point	**187**	***6***	151	161	32	200	162	279	270	143	151
Basildon	**113**	***4***	107	115	25	170	67	54	304	87	106
Thurrock	**111**	***4***	96	127	26	191	36	123	186	79	101
Southend	**105**	***4***	79	80	81	121	42	271	87	91	98
Weight for each indicator of deprivation			*22.5*	*22.5*	*13.5*	*13.5*	*9.3*	*9.3*	*9.3*		
*Deciles: 1st is most deprived,10th is least deprived											
Source: Department of Communities and Local Government											