

HARDISTY•JONES

Runnymede Housing and Economic Development Needs Assessment

Economy Workstream:
Appendix 7 Alternative periods

Runnymede Borough Council

March 2026

Appendix 7. Sensitivity Analysis

A7.1 Appendix 7 sets out the position on sites and premises requirements according to the alternative periods specified by Runnymede Borough Council.

2028–2038

Offices

A7.2 Table A7.1 sets out a gross requirement for between 51,000 and 61,000 sq m of additional office premises (including laboratories), and a net requirement for between 20,000 and 24,000 sq m delivered on new sites.

Table A7.1: Estimated future premises (sq m) requirements (offices) – Runnymede

| | | OE | CE | Sensitivity |
|----|--|---------------|---------------|---------------|
| 1D | Additional requirement | 19,400 | 24,000 | 18,100 |
| 2A | Replacement demand | 31,000 | 31,000 | 28,000 |
| | Total demand (1D + 2A) | 50,000 | 56,000 | 46,000 |
| 2B | Flexibility allowance | 5,000 | 5,600 | 4,600 |
| | Gross requirement (1D + 2A + 2B) | 55,000 | 61,000 | 51,000 |
| 2C | Delivered on existing emp. sites | 33,000 | 37,000 | 30,000 |
| | Net requirement (1D + 2A + 2B – 2C) | 22,000 | 24,000 | 20,000 |
| | Per annum | 2,200 | 2,400 | 2,000 |

Note: Figures may not sum due to rounding.

Industrial

A7.3 Table A7.2 sets out a gross requirement for between 4,300 and 10,600 sq m of additional industrial premises, and a net requirement for between 1,700 and 4,200 sq m delivered on new sites.

Table A7.2: Estimated future premises (sq m) requirements (industrial) – Runnymede

| | | OE | CE | Sensitivity |
|----|--|--------------|--------------|---------------|
| 1D | Additional requirement | (5,200) | (5,000) | 550 |
| 2A | Replacement demand | 9,000 | 9,000 | 9,000 |
| | Total demand (1D + 2A) | 3,900 | 4,100 | 9,600 |
| 2B | Flexibility allowance | 390 | 410 | 960 |
| | Gross requirement (1D + 2A + 2B) | 4,300 | 4,500 | 10,600 |
| 2C | Delivered on existing emp. sites | 2,600 | 2,700 | 6,300 |
| | Net requirement (1D + 2A + 2B – 2C) | 1,700 | 1,800 | 4,200 |
| | Per annum | 170 | 180 | 420 |

Note: Figures may not sum due to rounding.

Warehousing and Logistics

A7.4 Table A7.3 sets out a gross requirement for between 41,000 sq m and 42,000 sq m of additional industrial premises, and a net requirement for approximately 16,300–16,900 sq m delivered on new sites.

Table A7.3: Estimated future premises (sq m) requirements (warehousing and logistics) – Runnymede

| | | OE | CE | Sensitivity |
|----|--|---------------|---------------|---------------|
| 1D | Additional requirement | 15,400 | 14,600 | 16,100 |
| 2A | Replacement demand | 22,000 | 22,000 | 22,000 |
| | Total demand (1D + 2A) | 38,000 | 37,000 | 38,000 |
| 2B | Flexibility allowance | 3,800 | 3,700 | 3,800 |
| | Gross requirement (1D + 2A + 2B) | 42,000 | 41,000 | 42,000 |
| 2C | Delivered on existing emp. sites | 25,000 | 24,000 | 25,000 |
| | Net requirement (1D + 2A + 2B – 2C) | 16,600 | 16,300 | 16,900 |
| | Per annum | 1,700 | 1,600 | 1,700 |

Note: figures may not sum due to rounding

2028–2040

Offices

A7.5 Table A7.4 sets out a gross requirement for between 60,000 and 73,000 sq m of additional office premises (including laboratories), and a net requirement for between 24,000 and 29,000 sq m delivered on new sites.

Table A7.4: Estimated future premises (sq m) requirements (offices) – Runnymede

| | | OE | CE | Sensitivity |
|----|--|---------------|---------------|---------------|
| 1D | Additional requirement | 22,000 | 29,000 | 21,000 |
| 2A | Replacement demand | 37,000 | 37,000 | 34,000 |
| | Total demand (1D + 2A) | 60,000 | 66,000 | 54,000 |
| 2B | Flexibility allowance | 6,000 | 6,600 | 5,400 |
| | Gross requirement (1D + 2A + 2B) | 66,000 | 73,000 | 60,000 |
| 2C | Delivered on existing emp. sites | 39,000 | 44,000 | 36,000 |
| | Net requirement (1D + 2A + 2B – 2C) | 26,000 | 29,000 | 24,000 |
| | Per annum | 2,200 | 2,400 | 2,000 |

Note: Figures may not sum due to rounding.

Industrial

A7.6 Table A7.5 sets out a gross requirement for between 5,100 and 12,700 sq m of additional industrial premises, and a net requirement for between 2,000 and 5,100 sq m delivered on new sites.

Table A7.5: Estimated future premises (sq m) requirements (industrial) – Runnymede

| | | OE | CE | Sensitivity |
|----|--|--------------|--------------|---------------|
| 1D | Additional requirement | (6,300) | (5,900) | 660 |
| 2A | Replacement demand | 10,900 | 10,900 | 10,900 |
| | Total demand (1D + 2A) | 4,600 | 5,000 | 11,500 |
| 2B | Flexibility allowance | 460 | 500 | 1,200 |
| | Gross requirement (1D + 2A + 2B) | 5,100 | 5,500 | 12,700 |
| 2C | Delivered on existing emp. sites | 3,000 | 3,300 | 7,600 |
| | Net requirement (1D + 2A + 2B – 2C) | 2,000 | 2,200 | 5,100 |
| | Per annum | 170 | 180 | 420 |

Note: Figures may not sum due to rounding.

Warehousing and Logistics

A7.7 Table A7.6 sets out a gross requirement for between 49,000 sq m and 50,000 sq m of additional industrial premises, and a net requirement for approximately 19,400–20,000 sq m delivered on new sites.

Table A7.6: Estimated future premises (sq m) requirements (warehousing and logistics) – Runnymede

| | | OE | CE | Sensitivity |
|----|--|---------------|---------------|---------------|
| 1D | Additional requirement | 17,500 | 17,300 | 19,000 |
| 2A | Replacement demand | 27,000 | 27,000 | 27,000 |
| | Total demand (1D + 2A) | 44,000 | 44,000 | 46,000 |
| 2B | Flexibility allowance | 4,400 | 4,400 | 4,600 |
| | Gross requirement (1D + 2A + 2B) | 49,000 | 49,000 | 50,000 |
| 2C | Delivered on existing emp. sites | 29,000 | 29,000 | 30,000 |
| | Net requirement (1D + 2A + 2B – 2C) | 19,500 | 19,400 | 20,000 |
| | Per annum | 1,600 | 1,600 | 1,700 |

Note: figures may not sum due to rounding

2028–2045

Offices

A7.8 Table A7.7 sets out a gross requirement for between 82,000 and 100,000 sq m of additional office premises (including laboratories), and a net requirement for between 33,000 and 41,000 sq m delivered on new sites.

Table A7.7: Estimated future premises (sq m) requirements (offices) – Runnymede

| | | OE | CE | Sensitivity |
|----|--|---------------|----------------|---------------|
| 1D | Additional requirement | 29,000 | 40,000 | 27,000 |
| 2A | Replacement demand | 53,000 | 53,000 | 47,000 |
| | Total demand (1D + 2A) | 82,000 | 93,000 | 74,000 |
| 2B | Flexibility allowance | 8,200 | 9,300 | 7,400 |
| | Gross requirement (1D + 2A + 2B) | 90,000 | 100,000 | 82,000 |
| 2C | Delivered on existing emp. sites | 54,000 | 61,000 | 49,000 |
| | Net requirement (1D + 2A + 2B – 2C) | 36,000 | 41,000 | 33,000 |
| | Per annum | 2,100 | 2,400 | 1,900 |

Note: Figures may not sum due to rounding.

Industrial

A7.9 Table A7.8 sets out a gross requirement for between 7,100 and 17,900 sq m of additional industrial premises, and a net requirement for between 2,800 and 7,200 sq m delivered on new sites.

Table A7.8: Estimated future premises (sq m) requirements (industrial) – Runnymede

| | | OE | CE | Sensitivity |
|----|--|--------------|--------------|---------------|
| 1D | Additional requirement | (9,000) | (8,100) | 940 |
| 2A | Replacement demand | 15,400 | 15,400 | 15,400 |
| | Total demand (1D + 2A) | 6,400 | 7,300 | 16,300 |
| 2B | Flexibility allowance | 640 | 730 | 1,600 |
| | Gross requirement (1D + 2A + 2B) | 7,100 | 8,000 | 17,900 |
| 2C | Delivered on existing emp. sites | 4,200 | 4,800 | 10,800 |
| | Net requirement (1D + 2A + 2B – 2C) | 2,800 | 3,200 | 7,200 |
| | Per annum | 170 | 190 | 420 |

Note: Figures may not sum due to rounding.

Warehousing and Logistics

A7.10 Table A7.9 sets out a gross requirement for between 66,000 sq m and 71,000 sq m of additional industrial premises, and a net requirement for approximately 26,000–28,000 sq m delivered on new sites.

Table A7.9: Estimated future premises (sq m) requirements (warehousing and logistics) – Runnymede

| | | OE | CE | Sensitivity |
|----|--|---------------|---------------|---------------|
| 1D | Additional requirement | 22,000 | 24,000 | 27,000 |
| 2A | Replacement demand | 38,000 | 38,000 | 38,000 |
| | Total demand (1D + 2A) | 60,000 | 62,000 | 65,000 |
| 2B | Flexibility allowance | 6,000 | 6,200 | 6,500 |
| | Gross requirement (1D + 2A + 2B) | 66,000 | 68,000 | 71,000 |
| 2C | Delivered on existing emp. sites | 39,000 | 41,000 | 43,000 |
| | Net requirement (1D + 2A + 2B – 2C) | 26,000 | 27,000 | 28,000 |
| | Per annum | 1,500 | 1,600 | 1,700 |

Note: figures may not sum due to rounding

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