2013

BROXBOURNE BOROUGH GLASSHOUSE INDUSTRY

Planning for the Future

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1. Executive Summary

This report is produced as part of the Evidence Base to inform and assist the preparation of the new Local Plan for the Borough being undertaken by Broxbourne Council throughout 2012 and 2013. It relates specifically to planning policies concerning horticultural glasshouses.

The research objectives were to:

- Focus on the current economics of both active and derelict glasshouses and market gardens businesses in the Broxbourne area and benchmark against similar businesses elsewhere;
- Provide information on the economic importance of the industry to the area including profitability, employment and local expenditure;
- Set out the likely development of the industry over the next 10 years in terms of development, expansion, diversification and re-development and provide recommendations for future uses/developments of individual sites;
- Recommend if new glasshouse development should be promoted and determine how planning policy can meet the industry's objectives and wider land use policy objectives taking into consideration other external factors;
- Understand the industry's requirements in terms of planning policy to assist viability;
- Make recommendations for future development management policies for glasshouses and market gardens in Broxbourne, in the interests of the wider land use policy objectives of the Borough.

1.1 The economics of both active and derelict glasshouse and market garden businesses in the Broxbourne area

- Profit margins in even the most modern glasshouse businesses can be very tight – the sector experiences issues of price volatility and input price rises;
- The businesses within Broxbourne are generally less modern and are inefficient compared with businesses operating locally within Epping Forest District as well as other parts of the UK;
- Modernisation requires significant investment which local growers may struggle to implement from their current trading performance;
- Despite this, Broxbourne is suited to modern and efficient glasshouse production; given its high light levels, good transport links and location close to distribution centres;
- Derelict glass areas are capable of being converted to alternative uses, but many of these are likely to be non-conforming in the green belt. In addition, the older glass structures common

in the area cannot readily be adapted for new uses. The value of land for residential development far outweighs the returns from horticultural cropping.

1.2 Economic importance of the industry to the area

- Currently the sector is making a minimal contribution to the economy;

- However, 0.25 hectare of glass generates approximately £13,000 of employment, and based on the 17 current sites (totalling 53 hectares) at full production (and allowing 10% of the area of infrastructure/non-production) and based on 4 FTE per hectare of production, the sector has the potential to employ 200 FTE employment positions;

1.3 Likely development of the industry over the next 10 years

- In the current situation, the current derelict sites will remain derelict and some of the sites in production will also become derelict;

- There is probably only one business operating in the area that could fund a new glasshouse site with modern glass over a large area (3 ha plus);

- If investment funds were available then there are up to 6 sites (Darnicle Hill Nursery, Burton Grange Nursery, Tudor Nursery, Limes Nursery, Rosary Nursery and Britannia Nursery) totalling some 29 ha, which could be developed into modern sizable units;

- Glasshouse sites, especially larger ones, would need to be built with taller glass than current operations;

- There are growers in the Borough and within Hertfordshire who would invest in glasshouse production – however, they may need to sell some land for high value to fund such investment;

- The Lea Valley Growers Association have already identified businesses that would be interested in investing in glasshouse production in the Borough provided that planning policy was supportive and if suitable sites were identified and made available.

- Larger scale growers from outside the area were contacted regarding their interest in investing in glasshouse production within the Borough. An interest was expressed in larger scale glasshouse developments to grow peppers, aubergines or tomatoes.

1.4 Glasshouse development opportunities

- Some sites may be suitable for residential development, which would help to meet Broxbourne's housing targets. However, many sites are also ideally suited to food production. Both housing and food production are being promoted by current government policy;

- The availability of sites is likely to be a problem unless the existing site owners are the potential investors. Adjacent to Broxbourne within Epping Forest District, a number of sites are identified but not available or deliverable – current owners do not want to make the necessary investment, but are asking unrealistic prices (in terms of being able to develop a viable horticultural business) for the land;

- Without support and investment the glasshouse businesses in the Borough will fall further behind UK and international competitors and become even less viable, resulting in more dereliction, planning applications for non-horticultural use, and potential unauthorised uses.

1.5 Recommendations for future development management policies

- In terms of derelict glasshouses there is concern that the 'hope value' attached to glasshouse sites (of eventually receiving planning permission for housing or another financially beneficial use) may have a dampening effect on the vitality and viability of the industry, and disincentivises investment. In some cases the sites may then be left to become overgrown and return to nature, and require no further consideration or special policy response.

- For existing derelict glasshouses, Policies GBC 14 Rural Diversification and GBC15 Re-use of Existing Rural Buildings were the subject of considerable scrutiny prior to the adoption of the current Local Plan in 2005. Their terms and justification continue to be valid.

- Horticultural uses are appropriate in the green belt, but there is little evidence of pressure to develop sites in the green belt for new glass. As such, no special policy response is required to set out the acceptability of glasshouse development in the green belt, though the Council may wish to consider whether its policies should actively encourage growth of the industry;

- Through an appropriate development management policy, the Council could require that when planning permission is granted a condition will be attached to the effect that, when the use for horticulture ceases, glasshouses and other buildings and their concrete bases are dismantled, broken up and fully removed from the site, broken glass contamination of the soil is rectified and the land returned to a condition appropriate to its previous use. A legal agreement may be required to secure this, and an index-linked performance bond may also be necessary to ensure this happens;

- The Council could make explicit through an appropriate development management policy that they will serve amenity notice under section 215 where there is serious harm to amenity from dereliction. The service of an amenity notice can be effective in securing the actions required by the local authority to clean-up sites and as a 'threat' or informal mechanism for cleaning up sites. However, principal obstacles to the use of s.215 powers relate to the definition of 'amenity', the identification of the owner and problems of cost recovery.

2. Introduction

2.1 Summary of Research

This research is commissioned by Broxbourne Borough Council to assess the current and future outlook and options for the glasshouse sector in the Broxbourne Borough. The research was carried out between August 2012 and December 2012, and makes recommendations for future development management policies for glasshouses and market gardens within the Borough.

2.2 Research Objectives

1. Focus on the economics of both active and derelict glasshouse and market garden businesses in the Broxbourne area and benchmark against similar businesses elsewhere;

2. Provide information on the economic importance of the industry to the area including profitability, employment and local expenditure;

3. Set out the likely development of the industry over the next 10 years in terms of development, expansion, diversification and re-development and provide recommendations for future uses/development of individual sites;

4. Recommend if new glasshouse development should be promoted and to determine how planning policy can meet industry objectives and wider land use policy objectives taking into consideration other external factors;

5. Understand what the requirements are from the industry in terms of planning policy to assist the sector's long-term viability;

6. Make recommendations for the future development management policies for glasshouses and market gardens in the Borough of Broxbourne in the interests of the wider land use policy objectives of the Borough.

2.3 Approach and Methodology

The approach to the research was as follows:

1. Desk-based research
    a. Review of planning policy;
    b. Review of market gardens in the UK;
    c. Review of local and national statistics;
2. Survey of existing growers and site owners;
3. Meetings with growers and stakeholders;

The planning policy review sought to assess the following:

- Impact/influence of the new National Planning and Policy Framework (NPPF);
- Impact/influence of Lee Valley Regional Park Authority;
- Greenbelt policy;
- Other local policy and specific policies;
- Housing pressure and housing development policy;
- Land use objectives;
- Use of the General Permitted Development Order 1995;
- Policy in other key glass areas.

For each specific site identified by Broxbourne Borough Council, it sought to consider:

- What is the current use;
- What is the site like (in context of suitability for glasshouse use);
- What are the limiting factors of the site e.g. access, traffic, adjacent uses;
- Who owns the site;
- What prognosis there might be for the site.

The review of market gardens considers:

- What are the past, current and potential future land use options for market gardens;
- What the future outlook for the market garden industry is;
- What the key pressures on (and needs of) markets gardens for financial viability.

The review of local and national statistics considers trends in:

- Protected/glassed cropped areas and cropping;
- Unit size;
- Yields;
- Trade balance;
- Employment;
- Crop prices/values;
- Input costs;
- Benchmark performance.

The grower survey sought to establish:

- The current growing activities, areas of glass and market gardens;
- Business operation and management;
- Employment;
- Site design and size;
- Investment and business viability;
- Levels of dereliction.

All of the sites identified by Broxbourne Council were visited and inspected where possible.

The meetings with growers, grower representatives and stakeholders sought to consider and identify any other relevant considerations as the study went on.

3. Planning Policy Evidence Base

This chapter will focus on:

- A review of the relevant planning policies relating to glasshouses;
- Appraisal of the suitability of each site for glasshouse use or alternative use in light of the development proposals/alternative opportunities which have been promoted
- Recommendations on future development management planning policy for glasshouses/market gardens

Broxbourne Borough Council is expecting to have to release sites in the green belt for 1,000 to 2,000 new homes as part of the new Local Plan. The Council will be appraising the suitability of each site for housing as part of the local plan process.

3.1 Planning Policy Context

Definition

Horticulture falls within the definition of 'agriculture' as defined by Section 336 (1) of the Town and Country Planning Act 1990. Horticultural glasshouses are therefore appropriate development in the Metropolitan Green Belt.

National Policies

The National Planning Policy Framework (NPPF) was published in March 2012 and replaces Planning Policy Guidance Notes (PPGs), Planning Policy Statements (PPSs), some Circulars and best practice guidance documents. However, it contains no specific planning guidance or policy on the horticultural glasshouse industry. Nevertheless, there are some key changes:

Presumption in favour of sustainable development:

The most significant change is the emphasis on a new presumption in favour of 'sustainable development', with a clearly stated intention that the planning system is to play an important role in economic development:

"...significant weight should be placed on the need to support economic growth through the planning system."

The NPPF state that Local planning authorities must prepare their development plans with the presumption in favour of sustainable development at their core. The message is that development should be allowed wherever possible and should only be prevented if adverse impacts of developments would 'significantly and demonstrably' outweigh the benefits.

As the system will remain plan-led, delivering sustainable development will be ever more reliant on local development plan policies. The requirement for an up-to-date local plan and presumption in favour of sustainable development are compelling reasons for councils to complete plans and enable development for sustainable communities.

Green Belt

The NPPF reaffirms that the Government attaches great importance to Green Belts. The fundamental aim of Green Belt policy is to prevent urban sprawl by keeping land permanently open – the essential characteristics of Green Belts remain their openness and their permanence.

The NPPF clarifies that Green Belt will continue to serve five purposes:

- to check the unrestricted sprawl of large built-up areas;
- to prevent neighbouring towns merging into one another;
- to assist in safeguarding the countryside from encroachment;
- to preserve the setting and special character of historic towns;
- to assist in urban regeneration, by encouraging reuse of derelict and other urban land.

As with previous Green Belt policy, the NPPF confirms that inappropriate development is, by definition, harmful to the Green Belt and should not be approved except in very special circumstances.

The Framework states that a local planning authority should regard the construction of new buildings as inappropriate in Green Belt. Exceptions to this are:

- buildings for agriculture and forestry;
- the provision of appropriate facilities for outdoor sport, outdoor recreation and for cemeteries, as long as it preserves the openness of the Green Belt and does not conflict with the purposes of including land within it;
- the extension or alteration of a building provided that it does not result in disproportionate additions over and above the size of the original building;
- the replacement of a building, provided the new building is in the same use and not materially larger than the one it replaces;
- limited infilling in villages, and limited affordable housing for local community needs under policies set out in the Local Plan; or
- limited infilling or the partial or complete redevelopment of previously developed sites (brownfield land), whether redundant or in continuing use (excluding temporary buildings), which would not have a greater impact on the openness of the Green Belt and the purpose of including land within it than the existing development.

NOTE: The definition of 'Previously developed land' within Annex 2 of NPPF 'Glossary' excludes *'land that is or has been occupied by agricultural buildings'* and *'land that was previously-developed but where the remains of the permanent structure or fixed surface structure have blended into the landscape in the process of time'*. Glasshouse sites are therefore, in strict policy terms, not classed as being previously developed.

Certain other forms of development are also not inappropriate in Green Belt, provided that they preserve the openness of the Green Belt and do not conflict with the purposes of including land in Green Belt. These are:

- mineral extraction;

- engineering operations;
- local transport infrastructure which can demonstrate a requirement for a Green Belt location;
- the re-use of buildings provided that the buildings are of permanent and substantial construction;
- development brought forward under a Community Right to Build Order.

NOTE: A number of appeal decisions have concluded that glasshouses are not sufficiently substantial or permanent such that they would be considered a development 'not inappropriate' in the green belt.

Local Policies

Local planning documents currently comprise the saved policies of the **Hertfordshire Structure Plan**, the saved policies of the **Broxbourne Local Plan Second Review** (adopted December 2005) and Supplementary Planning Guidance documents which supplement existing Local Plan policies.

These documents will eventually be replaced by the Council's emerging 'new-style' Local Plan, and any other documents prepared to support that. This work is currently underway.

Previous Submission Core Strategy

A Core Strategy was also submitted to the Government in December 2010 and was subject to independent inspection in spring 2011, but some of its key policies were found to be 'unsound' and were recommended for deletion. The Council therefore decided on 25 July 2012 not to adopt the **Core Strategy** at the present time, and to instead prepare the 'new-style' Local Plan that combines strategic policies and site allocations.

Nevertheless, the strategy included the most up to date insight to the Council's strategic vision, and it is useful to summarise some policy statements in it relevant to the study:

'Development options for new housing and employment areas are constrained by green belt designations as well as the M25 to the south and Lee Valley Regional Park to the east. Too much development in existing towns could cause cramming and too much development in the green belt could erode the borough's leafy suburban character.' (Main Challenges, p14)

'In the short-term, development will focus on suitable urban sites to make best use of land and help achieve neighbourhood regeneration.' (Spatial Vision, p18)

'In the medium and long term, suitable urban sites will be complemented by green belt sites in order to deliver more family and larger homes. Land may be released at West of Hoddesdon, Goff's Oak, Bury Green and/or Albury Farm East for new housing. Proposals will be brought forward in accordance with comprehensive master plans to help secure appropriate services and facilities.' (Spatial Vision, p18)

'The green belt, Lee Valley Regional Park and other important open spaces, landscapes and historic assets will continue to be protected and enhanced.' (Spatial Vision, p18)

The Core Strategy Key Diagram (see Figure 1 below) was a graphic representation of the Spatial Vision, which identified sites where development is planned, and areas which will be protected from development. The Key Diagram indicated that the area between the built up area of Cheshunt at Rosedale and St James Village and Goffs Oak was a designated 'Area of Search' for new development, but also that the Rags Brook valley between Hammondstreet and St James village was a green corridor, afforded protection from development.

Figure 1 - Extract from Core Strategy Key Diagram

The Goffs Oak Area of Search contains almost all of the remaining Glasshouses within Broxbourne. The Core Strategy described it as follows:

'*Goff's Oak Area of Search refers to land broadly contained by Hammondstreet to the north, Rosedale to the east, Goff's Lane to the south and Goff's Oak village to the west. The whole area measures over 240 hectares and comprises housing, business premises, farms and associated farmland, active and derelict glasshouse sites and large areas of countryside.*

SHLAA proposals indicate development interest for a significant number of dwellings and the Council is aware of more detailed proposals being prepared for 750 - 1,000 dwellings to the west of Cheshunt. These would be well related to the existing urban area. The scale, impact and likely infrastructure investment means that development would be classified as a large green belt site warranting a comprehensive approach. The Transport Modelling Study finds that development could place pressure on the A10 / College Road Cheshunt junction and would need to be considered as part of an A10 Route Management Strategy. A Site Allocation DPD will determine which roads or landforms could form defensible new green belt boundaries. Obvious potential boundaries include Goff's Lane to the south and Rags Lane, Burton Lane or Crouch Lane to the west.'

Of relevance to the existing operational glasshouse and market garden sites the Core Strategy acknowledges that small employment and commercial sites located throughout the Borough provide premises for local businesses. The general approach of the Core Strategy was to avoid the loss of appropriately located smaller employment sites with a viable future.

Following adoption of the Core Strategy, a Site Allocation DPD would have been carried out, with a detailed green belt review of the identified areas of search as well as other green belt sites put forward as part of the SHLAA process. The emerging new-style Local Plan will address the same areas of search, and combine this exercise with the main strategic document.

3.2 Article 4 Direction

Certain types of development can be implemented without needing to apply for planning permission, under what are called 'permitted development rights'. They derive from a general planning permission granted not by the local authority but by Parliament through legislation, but the local planning authority may remove permitted development rights by issuing an 'Article 4 Direction'. This means that the types of development specified in the Article 4 Direction require planning permission, where they normally do not need it.

In 1950, Hertfordshire County Council directed that: *'development as specified in Paragraph 1 of Class VI of the First Schedule to the Town and Country Planning General Development Order, 1950 for the purposes of market gardens and nursery grounds*' should not be carried out within the urban districts of Cheshunt and Hoddesdon and the rural districts of Hatfield and Ware without first obtaining permission from the Hertfordshire County Council, under Part III of the Town and Country Planning Act, 1947. This Article 4 Direction remains in force today.

An Article 4 Direction is therefore a tool which is available to a local planning authority to respond to the particular need to withdraw the permitted development rights that would otherwise normally apply. An Article 4 direction does not prevent the carrying out of development to which it applies, but instead requires that a specific grant of planning permission is first obtained for that development to be carried out. As such, Broxbourne Borough Council has control over the development of land for market gardens and nursery grounds and is in a position to ensure that development of land for those purposes is acceptable and satisfies the policies of the Development Plan.

Guidance (in Circular 9/1995) advises that a Local Planning Authority should consider making Article 4 Directions only in those exceptional circumstances where evidence suggests that the exercise of permitted development rights would harm local amenity or the proper planning of the area. In deciding whether an Article 4 Direction would be appropriate, local planning authorities should identify clearly the potential harm that the direction is intended to address.

Circular 9/1995 advises that Article 4 Directions bringing agricultural and horticultural permitted development under full planning control will rarely be justified unless there is *'a real, specific and serious threat to amenity.'* A local planning authority will have to demonstrate that the exceptional beauty or the area is particularly vulnerable to damage from the indiscriminate erection of glasshouses. The advice goes on to say that before making an Article 4 Direction local planning authorities should consider the powers available to require the prior approval of certain details of development permitted by the Permitted Development Order.

However, in 1991 'prior notification' procedures were introduced in respect of the erection of agricultural and horticultural buildings, in order to meet concerns which had been expressed about the siting, design and external appearance of some of these buildings which had enjoyed permitted development rights. Significant glasshouse developments therefore now require planning permission, and even any smaller glasshouse developments require to be notified to the Council prior to their erection. In light of this and Circular 9/1995, it is therefore questionable whether the Article 4 Direction remains necessary.

However, officers of the council advise that there have been very few planning applications for glasshouse development in the last few years. In light of this lack of activity, the continuing existence of the Article 4 Direction may not have any impact on whether or not glasshouse developments proceed or not. Moreover, its revocation could have a significant administrative and legal cost for very little gain.

3.3 Broxbourne Local Plan Second Review

The adopted planning policies for shaping development in the Borough are currently set out in the **Broxbourne Local Plan Second Review**, which was adopted in December 2005.

Sustainability

The Local Plan confirms that a healthy economy is an essential and integral element of sustainable development. The maintenance of high and stable levels of economic growth and employment is essential to ensure that everyone can share in high living standards and greater job opportunities.

The Council produces an Economic Development Strategy that aims to encourage investment and provide support to existing businesses including existing glasshouse businesses. The Local Plan has an important role to play in supporting the Council's economic development objectives.

A key theme of sustainable development is re-using previously developed land for other purposes. The re-use of derelict/under-used/vacant land or buildings reduces the pressure to develop on green fields; that is open spaces within towns, green belt land and countryside.

Green Belt

In accordance with central government policy and the fundamental objective of maintaining the openness of the green belt, the local Plan reaffirms that development within it will continue to be tightly controlled and inappropriate development strongly resisted. Thus, there will be a presumption against all but appropriate development.

The following extracts set out the position of the Council on the glasshouse industry at the time of the adoption of the Local Plan in December 2005.

'Agriculture (which includes horticulture) remains an important user of green belt land despite the decline in the number of individual farms and nurseries. The glass house industry, in particular, suffered serious decline in the 1980's, as a result of which many glasshouses fell into dereliction. This was a key issue, which was addressed by the 1986 Structure Plan Review, and resulted in the adoption of policy 54. This stated, "In the area between Flamstead End and Goffs Oak, a local plan will be prepared to guide the long term development of the area. Some land will be excluded from the green belt but existing stretches of open land penetrating the area will be retained". Furtherance of this policy led ultimately to the adoption of former West Cheshunt policies WC1, WC2 and WC3 (St James' Village) and to large scale residential development accommodating in the region of 1100 dwellings. As a consequence of redevelopment, most of the earlier dereliction has now been substantially cleared. The Council is of the view that a good, but delicate, balance has been achieved in West Cheshunt between development and retained countryside, in accordance with the stated aim of policy 54 of the 1986 Adopted Structure Plan to retain stretches of open land penetrating the area. It therefore intends to resist further development over and above the level provided for by the 1986 Structure Plan within the West Cheshunt area.'

The Local Plan goes on to state at paragraph 2.5.17 and 2.5.18 that:

'Whilst the Council wishes to be supportive of well conceived farm diversification schemes, the situation in the Borough is somewhat different from the norm because of the previous importance of horticulture. Hence, redundant agricultural buildings in Broxbourne are more likely to be glass structures which cannot readily be adapted for new uses, rather than the more traditional brick and tile or modern concrete block buildings commonly found on farms. Many derelict glasshouses were cleared during the 1990's by the redevelopment programme which took place in West Cheshunt. Whilst the Council is aware that some problem areas remain, it is not prepared to countenance further redevelopment as previously included in the First Local Plan Review adopted in 1994, because of the irrevocable harm which would be caused to the character and appearance of the Green Belt. Furthermore, redevelopment cannot be conceived of as being diversification of the economy of a rural business. However, the Council may accept diversification of horticultural business into activities which are compatible with the rural environment and which can be undertaken from existing structures on nurseries.

Where existing buildings which are considered worthy of retention can be utilised, complying with the criteria in parts (I) (a) of GBC15 the Council will be supportive of well

conceived farm diversification schemes for business purposes which are consistent in their scale with their rural location. Levels of commercial traffic generation on rural roads will be an important consideration in terms of assessing the acceptability of proposals. Farm diversification schemes will be assessed against Policy GBC14. Applications for new buildings and uses in connection with farm diversification projects should be accompanied by a Business Plan to demonstrate the viability of the project.'

The Local Plan therefore includes the following policy related to farm diversification schemes, which are applicable to glasshouses.

GBC14 Rural Diversification

Farm Diversification Schemes will be permitted where:

(I) The proposal retains existing or provides additional employment;

(II) The proposal is complementary to the agricultural operation and will be operated in support of the farm holding and in association with continuing farming activities;

(III) The scale and character of the use is appropriate to the rural location and the amount of activity associated with it will not materially exceed that traditionally associated with the holding;

(IV) The proposal utilises existing buildings which fulfil the criteria of (a) of part (i) of policy GBC15;

(V) The proposal will not result in a material increase in commercial traffic on rural roads;

(VI) The proposal will not have a materially greater impact in terms of the local environment, residential amenity, and archaeological or ecological interests.

New buildings will only be permitted where:

(I) It is conclusively demonstrated that the form(s) of diversification proposed is/are the only viable option(s) for the holding;

(II) Existing buildings on the holding are not suitable, or are not capable of being made suitable, through adaption or extension to meet the requirements of the proposed diversification scheme;

(III) Buildings are of the minimum size necessary to fulfil the needs of the new enterprise and are located within or adjacent to, the existing complex of farm buildings;

(IV) Evidence of the intention to establish the new business on a sound financial bases is provided;

(V) Remaining buildings and structures on the holding which are superfluous to the requirements of the existing farm building and the new business are demolished within an agreed time frame related to the establishment of the new business; and

(VI) Appropriate landscaping that fosters local landscape character is undertaken.

Where the farm (glasshouse) diversification uses the existing buildings the proposal also has to fulfil the additional criteria in Policy GBC15 RE-USE OF EXISTING RURAL BUILDINGS. There is an explicit requirement expressed in Policy GBC14 for proposals which use an existing building to fulfil criteria in Part (1) (a) of Policy GBC15.

GBC15 Re-Use of Existing Rural Buildings

(I) Applications for the re-use of rural buildings will need to demonstrate that all of the following criteria are satisfied before the Council will consider the grant of planning permission:

(a) In respect of the building,

(i) It is of permanent construction and capable of re-use without major reconstruction, alteration or extension;

(ii) The bulk, form, materials of construction and general design of the building are in keeping with its surroundings such that the building does not have a negative impact on the area, and

(iii) The proposed conversion is sympathetic to the character and appearance of the building and its locality.

(b) In respect of uses,

(i) The proposal represents a sustainable use for both the building and the location concerned; in the case of proposals for residential use, business, community or tourist uses, or conversion to affordable housing, have been shown to be either inappropriate in planning terms or otherwise impractical

(ii) Undue detriment will not be caused to the amenity of nearby residents;

(iii) The level of traffic generated by the proposed use is appropriate to the location, and can be safely accommodated both by roads leading into the site and by the site access; and

(iv) The provision of any hard standing means of enclosure or other features required in connection with the proposed use will not adversely affect the appearance or openness of the surrounding countryside.

(II) The Council will require full details of the works necessary to effect conversion to be submitted with the application for planning permission, together with a structural survey of the building.

Where planning permission is granted for the re-use of a rural building, the Council may impose a condition to withdraw any permitted development rights, which would otherwise accrue, from implementation of the planning permission.

West Cheshunt Area

At the time of the adoption of the Local Plan review (December 2005) the Council stated its position on development in the West Cheshunt area (generally the same area as the Goffs Oak Area of Search) in the Housing chapter of the Local Plan:

'Many individual sites as well as wider tracts of land in this area have continued to be promoted to the Council for consideration for release from the green belt and allocation for housing development by landowners, those representing them and by development companies despite the strong opposing stance shown by the Council in First Deposit. The Borough Council sees this as a product of residential development brought forward during the latter 1990's in response to policy 54 of The Hertfordshire County Structure Plan Alterations 1991 and policy H1 of the Broxbourne Local Plan Review 1994.

The impact of the development that occurred in the 1990's as a consequence of the Structure Plan allocation upon the character of West Cheshunt is now evident. In the main the Borough Council is satisfied that the level of development accepted in the areas chosen, which contained the worst of the dereliction, has enabled the rural character to prevail. It was accepted at the last review that some areas of derelict glasshouses would not be redeveloped and it is interesting to note that in a number of instances natural regeneration has, in the main, obliterated the worst impact of dereliction. In some instances new woodland areas are appearing, containing the visual impact of both new and old development and enhancing the still predominant rural character. The three major areas developed through the last Local Plan period have retained, to a reasonable degree, visual and physical separation and most, although not all, of the dereliction has gone. Nevertheless the balance between the urbanised areas and the intervening rural swathes is delicate and in the light of advice in PPG3, the Council's own urban capacity study and compliance with adopted Structure Plan Review housing figures without the need for major green belt releases, the Council has come to the conclusion that further development in the West Cheshunt area is not justified as part of this Local Plan Review.

Pending a comprehensive borough wide review of housing needs and the Green Belt, the Council will resist any further development in the West Cheshunt area which would conflict with the purposes of including land in the Green Belt as set out in PPG2. During this period the Council will also resist any such ad hoc development proposals based upon the following factors:

- *damage to the dominant rural character of the Rags Brook Valley;*
- *the Inspector's comments following the last Local Plan Inquiry;*
- *sustainable development principles;*
- *the threat of coalescence of communities;*
- *compatibility with existing residential development;*
- *location in relation to major leisure, retail and employment areas;*
- *public transport provision*
- *educational facilities.'*

3.4 Policy Summary

New Glass

Horticulture is considered to be an appropriate use in the green belt. However, planning permission is required for glasshouse development by virtue of the Borough's Article 4 Direction, and any application would be assessed in normal terms including its effect on the openness of the green belt. No specific policies relate to preserving or encouraging glasshouses in the green belt, although there have been no planning applications for glasshouses or associated development within Broxbourne in the last five years.

Diversification

The Council continues (through Policies GBC14 and GBC15) to be supportive of well conceived rural diversification schemes, where into activities which are compatible with the rural environment and which can be undertaken within existing nursery structures. Full redevelopment is therefore not viewed as diversification of a rural business.

Dereliction

The decline and dereliction of glasshouse sites was addressed during the late 1990s in response to the Structure Plan Review 1991 and the Local Plan Review of 1994 – this resulted in the release and redevelopment of significant areas of glass for housing, eliminating much of the dereliction. At the time of this last review it was decided that some areas of derelict glass would not be actively redeveloped, and in a number of instances natural regeneration has occurred such that new woodland is appearing. There remain no specific policies which address the dereliction of redundant areas of glass.

Green Belt

National, regional and local planning policies all continue to resist inappropriate development in the green belt. The NPPF's limited relaxation relating to redevelopment of previously developed land in the green belt specifically excludes land that is or has been occupied by agricultural (or horticultural) buildings, and its reference to the re-use of buildings in the green belt as being appropriate would also not extend to glasshouses. This is because they do not fall into the definition of permanent and substantial construction.

The previous Core Strategy identified the green belt between West Cheshunt and St James as an area of search with scope for sites to be allocated to meet future housing need. The majority of the remaining glasshouse industry is concentrated in this area of search.

Redevelopment

As a result of this, a number of glasshouse sites are being actively promoted for housing and other development. This would not normally accord with green belt policies. However, the release and redevelopment of some existing glasshouse sites as part of the green belt review process would be a means to allow this, and is therefore being considered as part of the Council's ongoing Local Plan preparation.

4. Glasshouse Sites

The majority of the remaining glasshouses with Broxbourne Borough are concentrated in the West Cheshunt/Goff's Oak area. A green belt review was undertaken by Scott Wilson in 2008 to inform potential changes to the Green Belt as part of the Council's Local Development Framework process – this included an assessment of development opportunity sites including glasshouse sites, to inform an appropriate policy approach to land proposed to be removed from the Green Belt.

In addition a Strategic Housing Land Availability Assessment (SHLAA) (August 2010) identified sites with potential for housing, including a number of glasshouse sites.

During 2013, as part of its new-style Local Plan preparation, the Council will be deciding whether or not to propose to release land from the green belt in the West Cheshunt/Goffs Oak area, and allocate those sites for development.

To enable this process, this study will look at the availability, suitability and viability of each of the remaining glasshouse sites for continuing glasshouse use, taking into account any alternative opportunities that may be foreseeable. The 17 identified sites are shown on Figure 2, below:

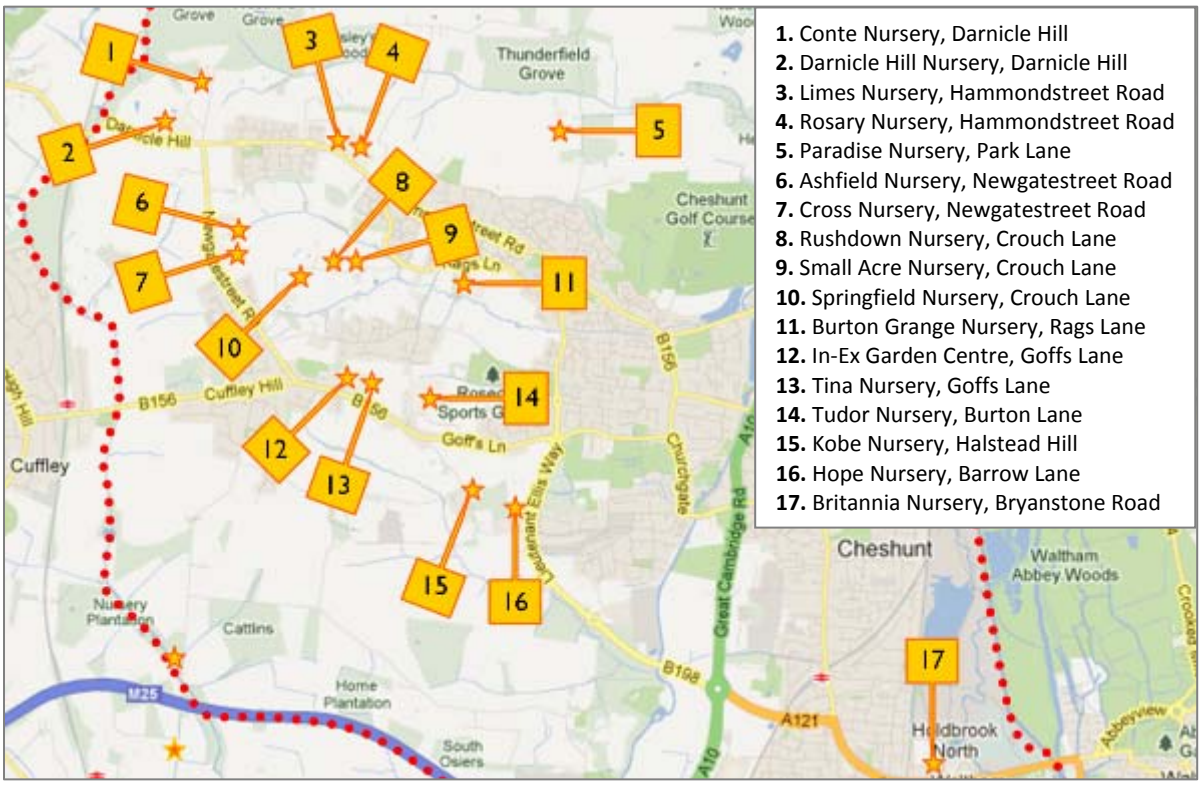


Figure 2 – Distribution of glasshouses in Broxbourne Borough

A detailed analysis of each glasshouse site, including its planning history, is contained in Appendix 3. This is summarised in Tables 1 and 2 on the following pages.

Table 1 – Summary of Current Glasshouse Operation

Nursery	Site Area	Nature of operation	Grower	Marketed
1. Conte Nursery	2.1 hectares	Not in production	None	None
2. Darnicle Hill Nursery	3.9 hectares	Lettuce production	Dingemans	Dingemans
3. Limes Nursery	3.5 hectares (0.8 ha in prod'n)	Lettuce production, but considering ceasing. Large proportion of glass is timber framed	Cifaldi & Cipullo	Cifaldi
4. Rosary Nursery	1.3 hectares	Some limited production, timber framed glass	Iameo	Iameo
5. Paradise Nursery	2.4 hectares (0.2 ha in prod'n)	Lettuce production, aluminium framed glass	Mula	Dingemans
6. Ashfield Nursery	1.2 hectares	Sweet peppers (wooden glass not suitable for standard peppers)	Giardina	Abbey View
7. Cross Nursery	2.2 hectares (less than 0.4 ha in prod'n)	Bedding plants	Samo	Samo
8. Rushdown Nursery	1.2 hectares	Not in production	None	None
9. Small Acre Nursery	1.6 hectares	Not in production	None	None
10. Springfield Nursery	1.7 hectares	Rented to Cifaldi	Cifaldi	Cifaldi
11. Burton Grange Nursery	3.4 hectares (1.2 ha in prod'n)	Owned by Abbey View – only viable as part of that larger business	Abbey View	Abbey View
12. In-Ex Garden Centre	1.8 hectares	In-Ex Garden Centre – retail use only, no production on-site	None	None
13. Tina Nursery	3.6 hectares	75% not in production. Tree and plant centre. Aluminium and wooden framed glass	Dileto	Dileto
14. Tudor Nursery	15.5 hectares	Timber framed glass (2.4ha) Aluminium glass (3.6 ha), not all in production. Growing cucumbers	Cannatella	Abbey View
15. Kobe Nursery	2.4 hectares (0.4 ha in prod'n)	Derelict (2 years), plans to start growing Bedding plants. Unit rented on site by Cabinet Maker	Deane	None
16. Hope Nursery	1.2 hectares (0.4 ha in prod'n)	Carnivorous plants	Euroflora	Euroflora
17. Britannia Nursery	4.1 hectares	Not in production, derelict site	None	None

Table 2 – Usability for Horticultural Production in Existing State

Nursery	Glasshouse	Limiting factors	Future potential of site
1. Conte Nursery	Unsuitable for production	Derelict condition of glass and size of site makes it unlikely to be viable as a glasshouse operation	Christmas trees being considered by owner
2. Darnicle Hill Nursery	Commercial operation	Size of the site for any additional development for glasshouse production	Current use is appropriate
3. Limes Nursery	A small area in production, mainly derelict	Access to the site, lack of capital available to the growers to invest, who would prefer to relocate outside Borough. Vandalism and access are two major issues.	Current use is appropriate, but major investment is required
4. Rosary Nursery	Limited production, timed framed glass	Limitation is area available to expand. Would need to be amalgamated with Limes Nursery to provide a large site for glasshouse development	Limited potential, though could be merged with Limes. Major investment also required
5. Paradise Nursery	Limited production	Size of site for development and owner having limited capital to develop the site for glasshouse production	Limited potential
6. Ashfield Nursery	Limited pepper production – owners specialising in niche sweet/small peppers	Wooden glasshouse limits the viability of production for the long term – the site is also small and limits expansion. However, niche use enables current business to survive.	Limited potential, major investment would also be required
7. Cross Nursery	Commercial production	Small site	Limited potential, major investment would also be required
8. Rushdown Nursery	Glasshouses were cleared from site 30 years ago	Owner does not want to invest in site and is over 60 years old with no successor	Limited potential – various incidences of unlawful operations could be controlled
9. Small Acre Nursery	Derelict glass	Owner does not want to invest in site and is over 60 years old with no successor	Limited potential – various incidences of unlawful operations could be controlled

10. Springfield Nursery	Commercial salad production	Tenant sees limited future in baby leaf production in area, owner not operating site	Limited potential.
11. Burton Grange Nursery	Glass is relatively new and suitable for pepper production	The topography of the site means that the glass cannot be expanded. The site needs investment in recycling water and energy saving to remain competitive.	Current use is appropriate
12. In-Ex Garden Centre	Site is suitable as a garden centre	Operated as a garden centre for some time – appears to be a successful business. Other businesses also being operated from the site, although these have no planning permission	In use as garden centre
13. Tina Nursery	Old aluminum and wooden glass (derelict), limited production	Large amounts of derelict glass on site	In use as retail/growing operation
14. Tudor Nursery	Part derelict wood framed glass, part aluminium glass suitable for cucumber production	Large amounts of derelict glass on site However, the site is a large, open and relatively flat area – at least 10 hectares of land suitable for glasshouse production	Current use is appropriate – the site is well suited to protected cropping
15. Kobe Nursery	Derelict glass	State of the glasshouse will restrict production to non heated crops or crops requiring limited amount of heat.	Ambitions to grow bedding plants. Otherwise, limited potential – major investment would also be required
16. Hope Nursery	Commercial production	The size of the nursery is restricted. The business has a low turnover and the balance sheet strength of the company would restrict expansion without outside funding.	The business has focussed on a niche market, which is achieving positive financial results.
17. Britannia Nursery	Derelict site	The site lies adjacent to the Lee Valley Regional Park who would object to any development not supported by Park Development Framework. Re-development as a glasshouse would require considerable investment.	Site could be viable, but use must meet the LVRPA remit

5. Overview of the Horticultural Sector

This section summarises the state of the wider horticultural sector, to give wider context to the changes in the protected cropping sector (explored in Chapter 6). Numbers of growers have often declined, and smaller growers lack scale of operation with limited financial ability or opportunity to expand. Conversely, many businesses that are expanding are reaping rewards from their investment – these businesses tend to be strong financially, with direct supply chains to supermarkets. These may be able to invest within Broxbourne. Further background evidence on these trends can be found in Appendix 1.

Background

Market gardening (the growing of salad and vegetable crops in the soil) in and around Broxbourne expanded significantly in the 17th to 19th century in order to supply the growing London markets. This was driven, in particular, by the demand for food and the availability of dung from London. Following market gardens, 'nursery gardens' also started to develop – stimulated by a fashionable demand for exotic plants and trees.

Market gardens are defined as small farms where plants, fruit and vegetables are grown for retail to the public. From a taxation point of view, this is specifically excluded from the definition of agriculture. However, from a planning point of view it is considered an agricultural use. Given the benefits of being deemed to be agriculture from a taxation point of view, this might be a wider barrier to the growth of the sector.

Market Value

- Consumer expenditure on fruit and vegetables in the UK is £16.9 billion.
- However, consumers will typically buy 90% of their fruit and vegetables from the four major supermarkets.
- Market gardens cannot match supermarket levels of convenience, even if they can compete on value and offer superior quality and freshness.
- Organic produce has a total annual value of £2 billion and, after dairy produce, fruit and vegetables are the second most purchased organic product.
- Plants and flowers retailed in the UK have a market value of £3.9 billion and this was, prior to the 2008 recession, showing double digit annual growth (CEIS, 2009).
- The garden retail market (a key customer for market gardens) is worth £4.6 billion.
- This market value is the same level as 5 years ago, however, in that time the market steeply declined in 2008 before recovering in 2009 and 2010 (HTA, 2011).

A key issue for the majority of market gardens is the volume of demand to supply 'trade customers', e.g. directly to small shops and restaurants. Setting aside supply to supermarkets, research has found that in order for trade supply to be viable, fruit and vegetables need to be supplied in minimum volumes of 100kg daily, and herbs 20-40kg daily.

Demand for garden products dipped at the beginning of the credit crunch in 2008, but recovered and began to grow slowly up to 2011 to £5.59 billion. Demand has been boosted by a tendency for people to spend more leisure time at home, and small-ticket items have fuelled growth. The 'grow your own' boom continues, with many consumers dabbling with growing edible produce at home. Major makeovers, along with other large items of expenditure on household refurbishment, are being deferred by the majority. Over the five years from 2011-16, expect sales of garden products are expected to grow by 9.3% to £6.11 billion (Mintel, 2011).

There is therefore significant potential demand for market garden produce, but, in excess of 90% of the market is controlled by supermarkets leaving only a small sector to supply. There are difficulties in supply to the trade sector due to a lack of scale, and the remaining consumer market is locally focused. This means that there can only be a small specific market in Broxbourne, and the majority of market gardens will therefore only be able to supply wholesale markets.

Wholesale Trends

IBIS World in 2012 reported that the fruit and vegetable wholesaling industry was struggling. Higher input prices and dwindling profit margins (caused by poor exchange rates and falls in average fruit prices) have caused the industry to struggle over the past five years. The increasing incidence of supermarkets bypassing wholesalers to purchase their fresh produce directly from growers has resulted in falling profits, and low rates of growth in revenue. The gross imbalance between the number of buyers and sellers, combined with the clout of supermarkets as a result of them being the 'one-stop-shop' for the majority of consumers, has caused wholesalers and farmers to bear the brunt of a recessive climate and higher input prices. The value of products within the wholesale sector has fallen by 0.3% since 2008.

Opportunities

DARD report that there is potential market opportunities for exotic produce with a high value, even if market demand is small. With changing climates in the UK, some of these products could be grown under glass or plastic in the UK and sold via market gardens. Opportunities for market gardens to promote themselves or diversify include:

- Carbon sequestration
- Green manuring techniques
- Agroforestry – fruit, nuts and coppice
- Biochar production
- Reduced fossil fuels
- Anaerobic digestion and renewable fuels
- Local food distribution
- Community engagement with hard-to-reach groups
- Volunteering and learning opportunities
- Strengthening the local economy
- Operation as semi-commercial social enterprises

6. Trends in Protected Cropping

This section looks at the trends in cropping techniques which have occurred in the past 10 years, and the reasons driving those changes. The UK sector has suffered from increasing competition from overseas for market share and from rising input costs – most notably energy and labour (refer to Appendix 1 for a detailed review). This rise in costs is driving growers to invest and innovate to increase crop yields and reduce unit costs of production or to leave the industry, and many of the main changes in technology follow Dutch best practice (see Chapter 7 for further information).

Background

Protected cropping is a specific area of market gardening, the term being used to encompass all crop growing under protective structures such as glasshouses or either permanent or temporary polytunnels. This gives protected cropping distinct characteristics as opposed to outdoor crop growing – growing in an enclosed space creates different conditions, and allows for manipulation of conditions to suit the grower. For example:

- The temperature is higher and can be further increased through heating
- The air can be enriched with carbon dioxide to increase productivity
- Pests can be controlled more effectively with biological control
- The soil can be cleared of weeds with longer lasting effect.

The permanent structures and equipment needed for protected cropping involve significant capital investment and maintenance costs. In the UK, producers generally focus on producing relatively high-value, mainstream crops such as tomatoes, peppers, salads and cucumbers. These different practices and costs involved in protected cropping also create a unique organic system.

6.1 Changes in The Sector in the Last 10 Years

- The sector has seen a reduction in the area of cropping, which has been offset by increases in productivity so the overall production for each crop has remained stable.
- The cropping area of tomatoes has fallen significantly due to foreign competition.
- There have been a select few large-scale glasshouse operations that have developed as a result of their competitive advantage – for example Cornerways Nursery near Kings Lynn which gets ‘free heat’ from an adjacent sugar beet factory, and Thanet Earth in Kent. Both have significantly impacted on the national statistics.
- Cucumbers, which are a major crop, are suffering from static prices and rising costs. This was further damaged by the E. Coli outbreak in 2011. Cucumbers remain significant in the Lea Valley, but there is now only one grower in the Broxbourne area.
- The introduction of specialist and niche crops such as sweet peppers, for which growers can obtain higher prices and produce a profitable return even from older glasshouses. However, these operators are at risk of the market being swamped by larger scale growers producing these crops more cheaply.

- Energy costs are rising significantly, driving growers to innovate. The aim for glasshouse growers has been to reduce energy prices by installing energy efficiency measures such as new boilers, thermal screens, CHP and water recycling.
- There has been a general trend towards taller glasshouses and larger units. Thanet Earth's latest glasshouse (2012/13 construction) for tomato production will be 8 meters high to the eaves, more than double the height of most glasshouses locally.
- Those businesses that have invested in newer glass and expanded are now more able to fund new developments. Larger producers now have marketing operations to supermarkets with packhouses that operate all year round, packing both UK and imported produce. These businesses are now multi million pound operations that can afford the larger scale development costs.
- Yields have increased as a result of new growing techniques imported from Holland:
  - Use of gutters (for optimal working heights);
  - Improved crop protection;
  - Artificial lighting;
  - Thermal screens;
  - Increase in the height of the glasshouses.
- Productivity of labour (i.e. output per labour unit) has increased to offset the rise in costs due to improvements in cropping techniques, varieties and glasshouse design.

6.2 Economic Outlook

10 Years Ago

- The economic outlook was reasonable, although imports were impacting on returns;
- Supermarket supply chains were formed and growers returns were linked to the supermarkets margins;
- EU grants were available for packers and growers through the Producer Organisation Scheme (funding production facilities, cold stores, new techniques, agronomy advice);
- Finance for expansion was available but the banks were conscious of the risks associated with the sector (high capital investment against low asset bases).

5 Years Ago

- The economic outlook was tight, with increased competition from Europe and the start of the recession;
- Grower Producer Organisations were being de-recognised and funding stopped. Grant aid was available to the packers for added value;
- Producers who were expanding were doing so on the back of a competitive advantage;
- There was investment in CHP, which was helping to reduce energy costs;
- Bank finance dried up as the economic downturn took effect

Present

- The economic outlook for the sector is difficult with high energy prices, which are expected to rise further in the future;
- Food scares such as the E. Coli outbreak impact on production with minimal compensation;
- The capital cost of developing a new site is increasing;
- The top 20% of growers are producing 80% of the output and greater concentration of production under the control of a few growers will increase.

6.3 Investment

- There have been a few major investments in the UK – main investments are Cornerways near Kings Lynn in Norfolk; Thanet Earth in Kent; Billingham in Northumbria; Chichester Plain in Sussex and small areas in the Lea Valley.
- This is largely due to:
  - Competitive advantage (light, heat, finance);
  - Strong financial companies behind the glasshouse business;
  - Scale of current operation and modern production techniques;
  - Integrated businesses supplying supermarkets direct all year round;
  - Local government and community being more supportive of the glasshouse sector;
  - Size of operation, which enables managers to be employed. The age profile of the management team is lower than many smaller scale sole trader/family operations.
- The lack of investment results from parlous returns and structure of the industry:
  - The smaller operators have not been producing sufficient trading profits to be able to re-invest;
  - There is a lack of succession to smaller businesses;
  - There are better alternative employment opportunities for the children of growers;
  - Opportunities are seen by growers to 'cash in' from selling their sites for housing.

6.4 Glasshouse Design

The trend has been to follow the Dutch in trend for glasshouse design, which is covered in the next section. There have been few large scale developments, which are often based directly on Dutch involvement and investment (e.g. at Thanet Earth). This has resulted in taller and larger glasshouses, and more energy efficient means of managing and heating the glasshouse environment. This trend will continue, based upon continental influence.

6.5 Government Involvement

- Horticulture in the UK is not, unlike in Holland, supported financially by government and hence needs to look to the market to generate profits for future investment.
- The industry does not expect to receive support from the government in the future.

7. International Comparison

This section of the report summarises the work undertaken by Triple Consultancy on behalf of the research team. They were asked to provide a summary of the Dutch protected cropping sector in relation to the key questions, which form each sub-heading. Holland was selected as a case study for the 'international perspective' as:

(a) It is a main competitor to the UK protected cropping sector;

(b) The sector has undergone some significant changes in past decades which may be relevant to this research; and

(c) A number of Dutch growers are investing in growing in the UK e.g. at Thanet Earth.

The developments and innovations being trialled and tested in Holland also tend to be, in due course, implemented in the UK.

7.1 Changes in Holland's Glasshouse Industry in the Last 10 Years

- Tomatoes have remained the primary crop, followed by sweet peppers and cucumbers;
- Tomatoes have become more differentiated (i.e. a wider range of products);
- Sweet pepper development has been focused on increased yield rather than new products due to the difficulty in differentiating between varieties.
- The area of protected cropping has increased by 17% in the last 10 years;
- The area of tomatoes increased by nearly 50% to 1,676 hectares;
- The pepper area increased to 1,399 hectares, an increase of 21%;
- The cucumber growing area was stable at 668 hectares.
- Yields have increased by nearly 20% in the last decade due to technological advances including:
    - Use of gutters (for optimal working heights);
    - Improved crop protection;
    - Artificial lighting;
    - Thermal screens;
    - Increased glass height.
- Productivity of labour (i.e. output per labour unit) has increased in the last 10 years;
- The labour structure has also changed significantly:
    - 10 years ago the manager of a glasshouse was typically the owner but this is now not the case - the owner will still oversee the business, but there will be a salaried operational manager;
    - The majority of casual labour was Turkish or Moroccan whereas now there is a larger proportion of Eastern European workers (especially Polish);

  - A large proportion of seasonal work is undertaken by students rather than immigrants;
  - Overall the management structure is more complex;
- Historically the majority of Dutch glasshouses used gas fired boilers for heating, but In the last decade this has changed with the increased use of decentralised CHP plants;
- Many businesses have a positive energy position (i.e. energy sales exceed energy purchases) and since 2006 the sector has been a net supplier of electricity;
- There has been a significant increase in the number of 'energy clusters' to achieve economies of scale in both capital investment and gas buying power;
- Glasshouses are being located close to industry to benefit from waste heat and CO_2;
- Glasshouse businesses/groups of businesses are creating ESCos (Energy Supply Companies);
- Growers are now looking at:
  - Geothermal energy;
  - Wind and solar energy;
  - Biogas CHP (anaerobic digestion).

7.2 Economic Outlook

10 Years Ago

- The economic outlook was good;
- Production and sales were fragmented, with many independent growers/suppliers;
- EU grants were available for investment in adding value to produce grown (packhouses);
- Finance for expansion was relatively easy due to profitability of the sector;
- There was a focus on environmentally friendly production and food safety.

5 Years Ago

- The economic outlook was fairly good;
- Sales were becoming more and more fragmented;
- Producers were increasing unit size;
- EU grants were used for investment in year round production (by artificial lighting);
- Some growers' associations invested in the establishment of labour supply companies;
- The energy market offered growers the possibility to reduce energy costs by using CHP;
- The German and UK consumers preferred home grown products;
- Eastern Europe was an increasing potential market for vegetables;

- The US and Japanese markets were increasingly supplied by Mexican and local greenhouse producers, and therefore exports to these countries were in decline.

Present

- The economic outlook for the sector is poor;
- Higher energy prices are increasing cost of production;
- Finance is harder to secure for investment;
- Production is increasing in other countries (Turkey, Poland, Russia, Ukraine, Spain) because of use of better growing systems (higher investments per m^2);
- Seasons overlap with other countries because of the better growing systems which is a drawback for an export orientated country like Holland;
- Interest in domestic production has increased in the UK and German markets;
- In 2009 all vegetable sectors faced significant price and cost pressures. In 2010 the tomato sector had a good year. However, most of the pepper and cucumber growers had poor yields;
- In 2011 the crisis of E coli bacteria in Germany directly influenced pricing of tomatoes, peppers and cucumbers.

7.3 Investment

- There has been a significant shift to the northern coast of Holland (Westland and Wieringermeer). This is largely due to:
  - Higher natural light levels;
  - Lower summer temperatures and higher winter temperatures;
  - There being a high concentration of horticultural businesses and distribution networks;
  - Local government and community being more supportive of the glasshouse sector;
  - A higher availability of skilled/semi-skilled labour agricultural labour;
- Many larger sites (>40 hectares) have been available, especially in Wieringermeer;
  - In addition to relocation, growers have focused investment on production technologies:
  - There is an increased use of gutter systems;
  - Energy costs are reduced through use of thermal screens;
  - Artificial lighting allows longer growing days;
  - Internal (i.e. company controlled) distribution logistics are reducing costs;
- There has been heavy investment in non-growing technologies:
  - Combined Heat and Power (CHP);
  - Labour services;
  - Central distribution centres.

7.4 Glasshouse Design

The table below summarises the typical glasshouse business in Holland 10 years ago and present:

10 years Ago	Present
Optimum unit size: - Tomatoes – 5 ha; - Sweet peppers – 3 ha; - Cucumber – 2 ha.	Optimum unit size: - Tomatoes – 8-10 ha; - Sweet peppers – 5-8 ha; - Cucumber – 5 ha.
Heat from natural gas boiler	**Heat and power from CHP**
Temperature controlled packing facilities on site	Small shed for short-term storage. Packing undertaken in large distribution centre
Maximising glass area less important	**Maximised glass on land area**
Typical height 4.5 metres	Typical height 6 metres, latest investment 8-9 meters
	Use of thermal screens
	Use of artificial lighting

7.5 Government Involvement

- Horticulture is concentrated on specific areas and is supported by government;
- These areas are referred to as 'green ports' with production, processing, packing, services and distribution all concentrated in these areas. Planning policy specifically related to these areas is supportive of glasshouse development and ancillary uses such as packhouses, logistics and offices;
- Five 'green port' areas have been identified by government, and local government within and adjacent to these green ports are considered very supportive to the development.

8. Grower and Stakeholder Surveys

8.1 Grower's Survey

An invitation to take part in the grower's survey was sent to all growers, and was followed up with a telephone call. The response rate was just under 50%, which is in line with what would be expected. These growers did however represent more than half of the 17 nurseries identified within Broxbourne, because one grower rents other sites. The small number of growers surveyed means that the results are not statistically sound – this should be taken into account when reviewing the findings below.

Key points:

- All of the survey respondents were owners;
- Nearly 50% did not have the next generation involved with the business;
- All respondents were in the 51+ age category;
- 25% of businesses also had production units outside the Borough;
- On average, where businesses also operated outside Broxbourne, only 20% of the production area of the business was within the Borough;
- The glasshouses in production were mainly aluminium framed and all were less than 4m tall;
- Crops being grown included cucumbers, peppers, and lettuce and baby leaf salad crops. One grower was considering changing their cropping in the next three years;
- Only one business packed on site;
- Of those businesses that responded and were in production, approximately half sell directly to the major retailers and half sell to wholesales markets;
- Just over one third of businesses had invested in their businesses in the last 5 years;
- Of the growers in production, 75% have invested to improve energy efficiency (thermal screens and improving water use), but only one in the glass structure itself;
- Only one businesses that responded plans to invest in their businesses in the next 5 years;
- Those in commercial production all expected to still be in business in 5 years time;
- Those sites not in commercial production had no intention of starting;
- When growers were asked what they would do if their site was sold for a 'significant value', the responses were equally split between:
    - Retiring;
    - Restructuring the business to non-food production activities;
    - Restructuring the business, keeping it in production and moving it from Broxbourne;
- Of the businesses surveyed over half had derelict glass on their sites. The preference was to knock down and clear the sites, although one was not planning to do anything about dereliction;

- There is a significant level of family labour employed in the nurseries. Labour cost is, with energy costs, the highest cost for most nurseries. The number of full time equivalent (FTE) staff per hectare ranged from 1.9 to 3.8 per hectare.
- Obtaining financial information was difficult. Of those respondents that provided financial data, the returns showed trading profits at a relatively low level. Rapidly rising energy costs were the main concern, along with static sale prices for produce.

8.2 Site Visits

All sites were visited and evaluated as part of the research. A more detailed analysis of the planning considerations relevant is undertaken in Chapter 3 and the full findings are set out in Appendix 3, however, below summarises the findings:

17 sites were identified by the Council:

- 2 sites (12%) were in full production;
- 9 sites (53%) were in partial or marginal production and were partially derelict;
- 5 sites (29%) were not in production and were fully/partially derelict;
- 1 site (6%) has been completely turned over to a garden centre/retail use;

A number of these sites have been promoted for housing schemes – and separately, several owners have other aspirations for alternative uses. Several sites have already seen alternative uses without full/proper formal planning consent – in one case, enforcement action is ongoing in relation to an unauthorised use.

Six sites are of a sufficient size (either on their own or in conjunction with adjacent sites) that they could be viable modern glasshouse business. All of these sites would need significant or complete renovation and new structures put in place, which would involve a high level of investment. Other constraints and factors may however limit this – this is explored further in giving each site a prognosis for the future in Chapter 9.

8.3 Meeting with Lea Valley Growers Association and Growers

Summary of Meeting with LVGA, Growers and Broxbourne Council – 25th September 2012.

Attendance:	Lee Stiles	LVGA
	Brian Hibberd	Abbey View Produce
	Leslie Cifaldi	Limes Nursery
	Tony Cifaldi	Limes Nursery
	Colin Haigh	Broxbourne Council
	Robert Webster	Broxbourne Council
	Keith Leddington-Hill	LGP

Key issues that affected one nursery within Broxbourne Borough include:

- Shading from trees (1% shading means 1% less crop yield);

- Vandalism from the neighbouring playing field
- Vandalism from bridle path 10 meters from the nursery (bottles, bricks etc.)
- Autumn leaves through the vents onto the baby leaf salads (plus glass from vandalism falling on to the crop)
- The entrance to the site being blocked by parked cars (children's football matches occur on the playing field and they park in the road because the car park is too small).

The same grower has production sites outside the Borough, but packs their produce centrally in Broxbourne. However, they are considering de-investing due to the issues above.

There are limited numbers of commercial growers in the Borough, and in the wider Lea Valley area (including Epping Forest and St. Albans) there are 6 main packhouses. In the Borough there is one nursery owned by Abbey View Produce, but this packs and markets locally for 26 growers covering approximately 38 hectares of glass.

On many sites the glass is too old, and as such it is inefficient and unviable to be used for production. As a result, many of the nurseries within the Borough do not produce food crops on their sites or have significantly reduced output.

The Lea Valley Growers' Association believe that there is only one grower already within the Borough who would be interested in (and could afford) to expand their glasshouse operations. However, there are other growers in the Hertfordshire area who would be interested in developing larger sites in the Borough of around 10-20 hectares, with modern glass at 6-8 meters height. A letter expressing this interest in new areas of glass is included in Appendix 2, and a summary of the contact with these larger scale growers can be seen in Section 8.4 below.

Some growers suggested that to enable existing growers to develop their businesses the Council could consider housing on part of the site to enable the owner to reinvest in new glass. At least 2 sites were identified where this could happen.

It was also suggested that historic planning policy had resulted in the larger nurseries being developed for housing (estates) as they were large sites, which left the smaller nurseries remaining. Many of the owners of the smaller nurseries have retired (70-80 year olds) and no longer have an interest in growing, and as a result there are a number of derelict sites which could be developed for alternative uses.

8.4 Contact with large growers outside Broxbourne

Four growers who do not currently operate within Broxbourne were contacted, to gauge the level of interest in any potential glasshouse investment opportunities within the Borough. The response was positive, and there would therefore be likely to be a high level of interest in any site, as long as it could provide economies of scale by having:

- An absolute minimum build area of 2.5 ha of glass;
- An availability of gas and electricity;

- Good road access.

These prospective growers would require the planning permission to permit building glasshouses to a minimum of 6 meters eaves height. This would enable them to viably grow peppers, aubergines or tomatoes.

8.5 Lee Valley Regional Park Authority

A large tract of Green Belt land within Broxbourne lies within the Lee Valley Regional Park. Whilst only one glasshouse site within Broxbourne is now left within the Park, historically much of the Lee Valley floor was characterized by the proliferation of glasshouses. Indeed, many of the glasshouse sites within the adjacent Epping Forest District are within or adjacent to the Lee Valley Regional Park, and so the glasshouse industry and the Park Authority have some areas of interaction.

The Park Authority was therefore contacted for its views on the future of the glasshouse industry within Broxbourne.

The Lee Valley Regional Park Authority's remit, described in a 1966 act of parliament, embraces leisure, sport and recreation, including nature conservation and the protection and enhancement of the natural environment. The Authority is able to exercise this duty by itself, or by acting in partnership with or seeking the services of companies, individuals or other bodies. This partnership power is an important part of the Authority's approach working with the public and private sector. Details on the Park's authority and remit can be found on their website at www.leevalleypark.org.uk.

The only glasshouse within the Park's boundary is Britannia Nurseries. The site is currently derelict and has also variously been used for non-horticultural purposes. This site has been subject to meetings between the Borough Council and Park Authority representatives, but the Authority is concerned with creeping industrialisation of sites such as this.

The Authority has stated that it would not be supportive of the principle of developing the site at Britannia Nurseries for housing, but would support its re-instatement for a Regional Park use, as the site is located within the Park's identified Landscape Investment Area. The Authority would however be more sympathetic to the site being re-developed for glasshouse production.

None of the remaining current glasshouse sites considered in the study fall within or affect The Park. However, the Authority would object to any other development on sites within Broxbourne which have been reclaimed to 'park use'.

9. Summary & Conclusions

9.1 Findings

Fundamentally, the issue of whether or not Broxbourne Borough Council should support the future development of glasshouse businesses comes down to two core matters – economics, and public perception.

- A viable glasshouse sector can have significant economic benefits – in terms of investment, employment and high value economic activity in the Borough. However, the current sector within Broxbourne, which has declined to a 'cottage industry scale', is providing little economic benefit;

- In their current state, the glasshouse businesses operating in the Borough will be unable to compete with other glasshouse areas in the UK and on the Continent, where technological investment and expansion is occurring;

- Public perception of a large-scale glasshouse sector is, in our experience, likely to be negative. Issues typically relate to the hours of operation (in particular relating to the movement of vehicles), light pollution and the height of the glasshouses. Often these issues (possibly with the exception of the vehicle movements) are unfounded, but this could be a particular barrier to the development of large-scale glasshouse sites;

- An alternative option of residential development on some/all of the existing sites would potentially bring greater short-term economic benefit in terms of development and construction (it is questionable, assuming a national company would undertake the development, how much benefit would be local), but the long-term economic benefit would then be negligible;

- Almost all non-urban land (including all identified glasshouse sites) within Broxbourne is within the Green Belt, and restrictions on development apply. Glasshouse and market garden production is however considered to be an agricultural use from a planning perspective, and as such is deemed suitable development within the green belt;

- National policy means that Broxbourne is expecting to release sufficient land for 1,000 – 2,000 residential dwellings within the Green Belt as part of its new Local Plan. For this, the Council has previously identified four 'areas of search' for residential development – West of Hoddesdon, Goff's Oak, Bury Green and Albury Farm East;

- The NPPF does not have any policy specifically related to horticultural production. The NPPF does, however, commit to support 'sustainable development' and reaffirms the importance of and restrictions relating to the Green Belt;

- Broxbourne Borough has ideal climate, light levels and topography for efficient glasshouse production. Issues such as traffic, access, vandalism and shading do however limit potential at certain locations;

- The existing Broxbourne Local Plan does not make reference to the glasshouse or horticultural sector, does not (although previous plans did) have a policy in relation to dereliction but does have clear policy on diversification and reuse of existing structures (GBC 14);

- Nationally, regionally and locally the area of protected cropping has been in decline for a number of years. Both nationally and in Hertfordshire this has stabilised since 2006;

- The average size of the protected cropping industry is increasing. The output from protected cropping businesses is also increasing – this is largely due to more modern and efficient glass (taller and better insulated) and efficient units;

- Glasshouse businesses have significant opportunities to generate employment, and in the adjacent district of Epping Forest, employment in the sector is above the national average and is growing;

- Horticultural prices have been generally increasing but there has been significant volatility, making profitability variable and business planning difficult. Input costs have been increasing significantly in particular fuel costs which will have a greater impact on older less efficient glass;

- Profit margins are very tight and as such only the most efficient and modern businesses with sufficient scale can be viable. Profit margins are typically in the region of 7% with rising input costs and volatile income levels – businesses are under pressure;

- Previous planning policy and the economics of production mean that predominantly only the small and unviable sites remain in the Borough, the majority of which have old and inefficient infrastructure which has received little investment. This minimises its chances of being viable in the future;

- Only six sites within Broxbourne (of which none are fully developed and some which have multiple ownership) are of a size that is likely to be viable in the current economic climate. There are, however, several growers who would expand or modernise their sites if some of the area could be sold for alternative uses to fund the development;

- There are some growers within Hertfordshire who would, if planning policy supported their investment, develop large sites (10-15 hectares) within the Borough – but the cost of land if valued for residential development could be a barrier.

9.2 Glasshouse Site Prognosis

The assessment of each site is based on site visits, survey findings and review of accounts and general assessment of the area. Further information on each site can be found in Appendix 3.

Table 3 - Glasshouse Sites Potential Planning Policy Options

Nursery	Glasshouse Production Prognosis	Potential Planning Policy Options
Conte Nursery	The site is not in production. The derelict condition of the glass and limited size makes it unlikely to be viable as a glasshouse operation.	- Retention as green belt could encourage alternative horticultural production - A well conceived rural diversification scheme could be considered
Darnicle Hill Nursery	Current viable commercial operation but limited expansion potential.	- Site is viable for glasshouse use, appropriate in the green belt
Limes Nursery	Part in profitable commercial production although a large part is derelict. Potential for re-use and expansion – the site could be a long term commercial site.	- Site is viable for glasshouse use, appropriate in the green belt
Rosary Nursery	Site in limited production but understood to be winding down. Site is too small to return to major commercial production, but could be amalgamated with Limes Nursery to provide a commercial site.	- Retention as green belt could encourage alternative horticultural production - A well conceived rural diversification scheme could be considered - If the site was amalgamated with Limes Nursery, it could be viable for a glasshouse use, appropriate in the green belt
Paradise Nursery	In commercial production but small site, which limits long term prospects.	- Site may continue to be viable for glasshouse use, appropriate in the green belt - A well conceived rural diversification scheme could be considered
Ashfield Nursery	In niche commercial production. Could be redeveloped to improve commercial production over the longer term.	- Site may continue to be viable for glasshouse use, appropriate in the green belt - A well conceived rural diversification scheme could be considered
Cross Nursery	Currently bedding plant production. Limited expansion potential.	- Site may continue to be viable for glasshouse use, appropriate in the green belt - A well conceived rural diversification scheme could be considered
Rushdown Nursery	Not in production and no commercial opportunity for glasshouses.	- Retention as green belt could encourage alternative horticultural production - A well conceived rural diversification scheme could be considered
Small Acre Nursery	No commercial opportunity. Glass on site is derelict.	- Retention as green belt could encourage alternative horticultural production - A well conceived rural diversification scheme could be considered

Springfield Nursery	In limited production, but the site is too small for long term commercial production.	- Site may continue to be viable for glasshouse use, appropriate in the green belt - A well conceived rural diversification scheme could be considered
Burton Grange Nursery	Commercial operation from relatively new glasshouses, but topography limits expansion potential. Further investment may be needed to remain competitive.	- Site is viable for glasshouse use, appropriate in the green belt
In-Ex Garden Centre	The site is not in commercial production, and is used as a garden centre but with various unauthorised retail uses. Planning status of site needs resolving. Reversion to horticulture is conceivable, but if retail use is allowed commercial realities would make this unlikely.	- Planning policy options depend on planning status of the site.
Tina Nursery	The site is in limited production, and used as a tree and plant centre (retail use). Commercial realities make a full return to horticulture unlikely.	- Planning policy options depend on planning status of the site - Site may continue to be viable for glasshouse use, appropriate in the green belt
Tudor Nursery	Site in commercial horticultural production with large open relatively flat area suitable for glasshouse production. The site has potential for large scale glasshouse production.	- Site is viable for glasshouse use, appropriate in the green belt
Kobe Nursery	Mostly derelict glass. Site could be developed for commercial production particularly if the site could be extended, subject to topography.	- Retention as green belt could encourage alternative horticultural production - A well conceived rural diversification scheme could be considered
Hope Nursery	Niche commercial operation (carnivorous plants) although the size of the nursery restricts potential.	- Site may continue to be viable for glasshouse use, appropriate in the green belt - A well conceived rural diversification scheme could be considered
Britannia Nursery	Derelict site. The site has been derelict for sometime and suffers from vandalism following a major fire. Viability for horticultural production is doubtful.	- Site is of a size that may be viable for glasshouse use, appropriate in the green belt - Site is remote from other glasshouses and adjacent to very urban area - Removal from green belt could encourage investment in the site

9.3 Conclusions

Economics of both active and derelict glasshouse and market garden businesses in the Broxbourne area.

- Profit margins in even the most modern glasshouse businesses can be very tight – the sector experiences issues of price volatility and input price rises;
- The businesses within Broxbourne are generally less modern and are inefficient compared with businesses operating locally within Epping Forest District as well as in other parts of the UK;
- Modernisation would require significant investment which local growers may struggle to implement from their current trading performance;
- Despite this, Broxbourne is suited to modern and efficient glasshouse production; given its high light levels, transport links and location close to distribution centres;
- Derelict glass areas are capable of being converted to alternative uses, which require less input and margins are typically higher. However, these uses are likely to be non-conforming uses in the green belt. In addition, the older glass structures which are common in the area cannot readily be adapted for new uses. The value of land for residential development far outweighs the returns from horticultural cropping.

Economic importance of the industry to the area.

- Currently the sector is making minimal contribution to the economy;
- However, 0.25 hectare of glass generates approximately £13,000 of employment, and based on the 17 current sites (totalling 53 hectares) at full production (and allowing 10% of the area of infrastructure/non-production) and based on 4 FTE per hectare of production, the sector has the potential for 200 new FTE employment positions;
- There are six sites which total some 29 ha of potential glass which could be developed. This would make a significant contribution to the local economy.

Likely development of the industry over the next 10 years.

- In the current situation, without consent for alternative development, the current derelict sites will remain derelict and some of the sites in production will become derelict;
- There is probably only one business operating in the area that could fund a new glasshouse site with modern glass over a large area (3 ha plus);
- Glasshouse sites, especially larger ones, would be built with taller glass than current operations;
- There are growers in the Borough and within Hertfordshire who would invest in glasshouse production however; they may need to sell some land for high value to fund such investment;

- The Lea Valley Growers Association have already identified businesses that would be interested in investing in glasshouse production in the Borough provided planning policy was supportive and if suitable sites were identified and made available. This was supported by interviews with large scale growers operating outside the Borough.

Glasshouse development opportunities

- Some sites may be suitable for residential development, which would help to meet Broxbourne's housing targets. However, many sites are also ideally suited to food production. Both housing and food production are being promoted by current government policy;
- Availability of sites is likely to be a problem unless the existing site owners are the potential investors. Adjacent to Broxbourne within Epping Forest District, a number of sites are identified but not available or deliverable – current owners do not want to make the necessary investment, but are asking unrealistic prices (in terms of being able to develop a viable business) for the land;
- Without support and investment the glasshouse businesses in the Borough will fall further behind UK and international competitors and become even less viable, resulting in more dereliction, planning applications for non-horticultural use, and potential unauthorised use.

Requirements of the industry in terms of planning policy to assist the sector's long-term viability

- Viable units in the future will need:
  - To be at least 3 hectares;
  - Glass structures at least 6 meters high
  - To be flat or slightly sloping topography;
  - To be ideally mains gas supply or alternative energy;
  - To be suitable supply of other services e.g. water;
  - To have good road access and communications;
  - Ideally the absence of local residential housing.
- Where this applies sites could be promoted for glasshouse development;
- Some sites may be more suited to residential development, rural diversification or managed reuse. This is especially the case for some of the smaller sites.

9.4 Recommendations

Recommendations for how the industry should be promoted and how planning policy could meet industry objectives taking into consideration other external factors.

- Glasshouse production could generate significant economic benefits for the area and as such The Borough should support, where possible, new glass development as this will bring significant economic benefits to the area.

Recommendations for the future development management policies for glasshouses and market gardens in the Borough in the interests of the wider land use policy objectives.

- In terms of derelict or unused glasshouses, although the problem is not entirely resolved it is greatly reduced from when it was considered at the time of previous Local Plans. There is however a concern that the 'hope value' attached to glasshouse sites (of eventually receiving planning permission for housing or another financially beneficial use) may have a dampening effect on the vitality and viability of the industry, and disincentivises investment.
- The Council could make explicit through an appropriate development management policy that the will serve amenity notice under section 215 where there is serious harm to amenity from dereliction. The service of an amenity notice can be effective in securing the actions required by the local authority to clean-up sites and as a 'threat' or informal mechanism for cleaning up sites. However, principal obstacles to the use of s.215 powers relate to the definition of 'amenity', the identification of the owner and problems of cost recovery.
- In some cases however, derelict sites may effectively return to nature as they become derelict and overgrown, and require no further consideration or special policy response.
- For existing derelict glasshouses, Policies GBC 14 Rural Diversification and GBC15 Re-use of Existing Rural Buildings were the subject of considerable scrutiny prior to the adoption of the Local Plan in 2005. Their terms and justifications continue to be valid.
- Horticulture is an appropriate use in the green belt, although there is little evidence of pressure to development sites in the green belt for new glass. As such, no special policy response is required to either manage or restrict horticultural use in the green belt.
- Through an appropriate development management policy, the Council could require that when planning permission is granted a condition will be attached to the effect that, when the use for horticulture ceases, glasshouses and other buildings and their concrete bases are dismantled, broken up and fully removed from the site, broken glass contamination of the soil is rectified and the land returned to a condition appropriate to its previous use. A legal agreement may be required to secure this, and an index-linked performance bond may also be necessary to ensure this happens.

Appendix 1

Review of the glasshouse sector

The following section contains a review of the wider structural sate of the glasshouse sector and horticultural industries within the UK. This has been extracted from the recent glasshouse report for Epping Forest District Council, published in early 2012.

Crop Areas

There has been a clear trend for decreasing protected cropping areas (Table 1).

	1991	1996	2001	2006	2009	*% Change (1991-2009)*
North East Region	27	18	21	20	15	*-44.4%*
North West & Merseyside	220	265	234	226	214	*-2.7%*
Yorkshire & Humber	296	284	247	240	205	*-30.7%*
East Midlands	212	205	168	173	158	*-25.5%*
West Midlands	161	159	168	195	189	*17.4%*
Eastern England & Greater London	***496***	***427***	***378***	***429***	***384***	***-22.6%***
South East England	492	494	457	385	408	*-17.1%*
South West England	197	218	190	207	178	*-9.6%*
ENGLAND	**2,101**	**2,070**	**1,863**	**1,875**	**1,751**	***-16.7%***

Table 1 – Total Area (Hectares) of Crops Grown Under Glass/Plastic in England (DEFRA June Census, 2009)

England has seen protected cropping areas decline by 16.7% (350 hectares). Eastern England and Greater London[1] has seen a 112 hectare decline in area under glass/plastic (as reported in the DEFRA June Census, 2009) representing a decline of 22.6% between 1991 and 2009 (see Figure 1).

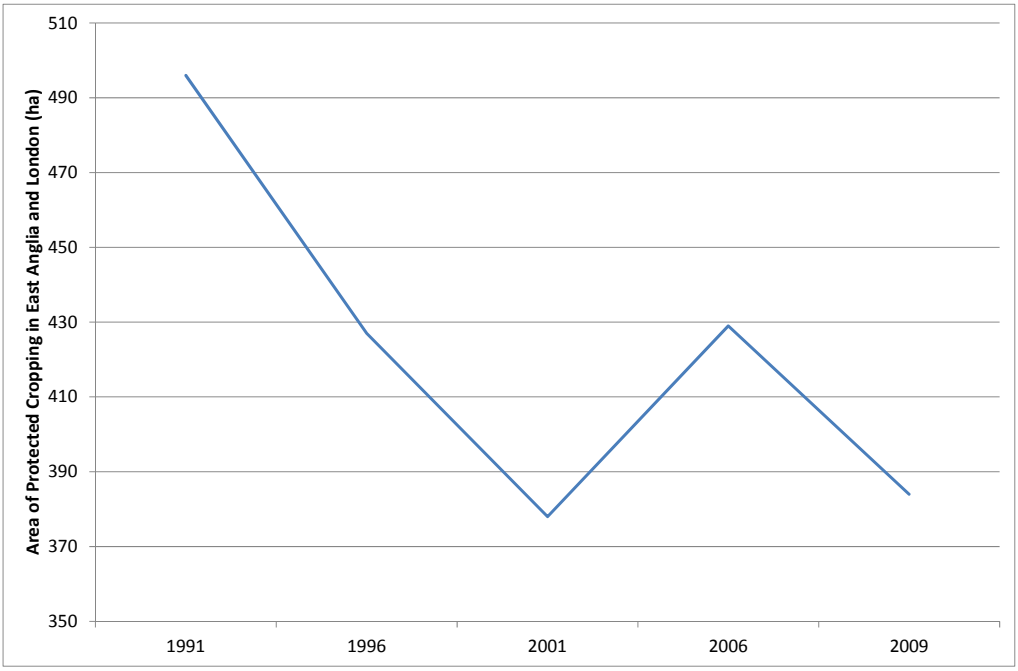


Figure 1 – Total Protected Cropping Area in East Anglia and London (DEFRA June Census, 2009)

[1] *DEFRA now categorises Greater London with the South East Region, however, for continuity the data has been manually revised to retain Greater London in the Eastern England dataset*

Eastern England and Greater London remains a significant region in terms of protected cropping (Figure 2). Only the South East (23.3% of total area) has a larger area of protected cropping (i.e. area under glass/plastic) than this region (21.9%):

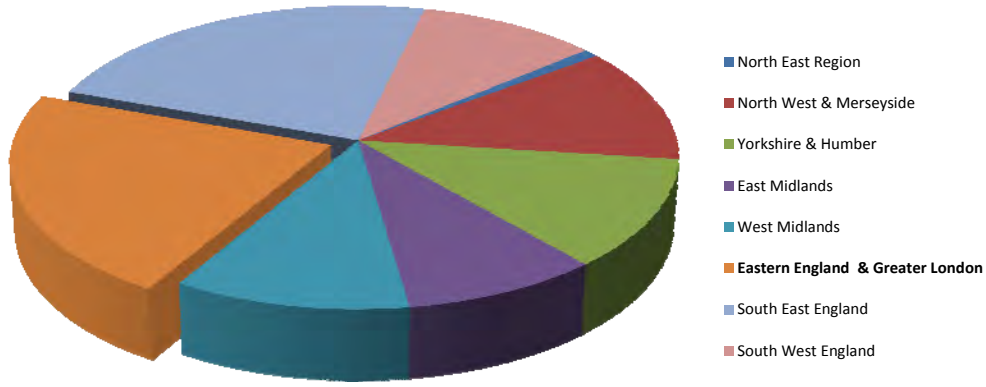


Figure 2 – Regional Breakdown of Cropped Area under Glass/Plastic (DEFRA June Census, 2009)

Focusing on the Eastern Region (Table 2) only Norfolk has bucked the trend of declining protected cropping areas. The increase in Norfolk is highly likely to be as a result of a trend towards soft fruit strawberries being grown under plastic and the British Sugar tomato unit at Wissington.

	1991	1996	2001	2006	2009	% Change (1991-2009)
Norfolk	61	57	62	143	123	101.6%
Suffolk	32	30	33	23	17	-46.9%
Cambridgeshire	86	51	51	45	39	-54.7%
Bedfordshire	47	41	24	12	11	-76.6%
Hertfordshire[2]	57	50	41	34	35	-38.6%
Essex[2]	183	171	157	153	146	-20.2%
Total Eastern England	**466**	**400**	**368**	**410**	**371**	**-20.4%**
Greater London	30	27	10	18	13	-56.7%
Eastern England & Greater London	**496**	**427**	**378**	**428**	**384**	**-22.6%**

Table 2 – Total Area (Hectares) of Crops Grown Under Glass/Plastic in Eastern England (DEFRA June Census, 2009)

[2] *See Figure 3*

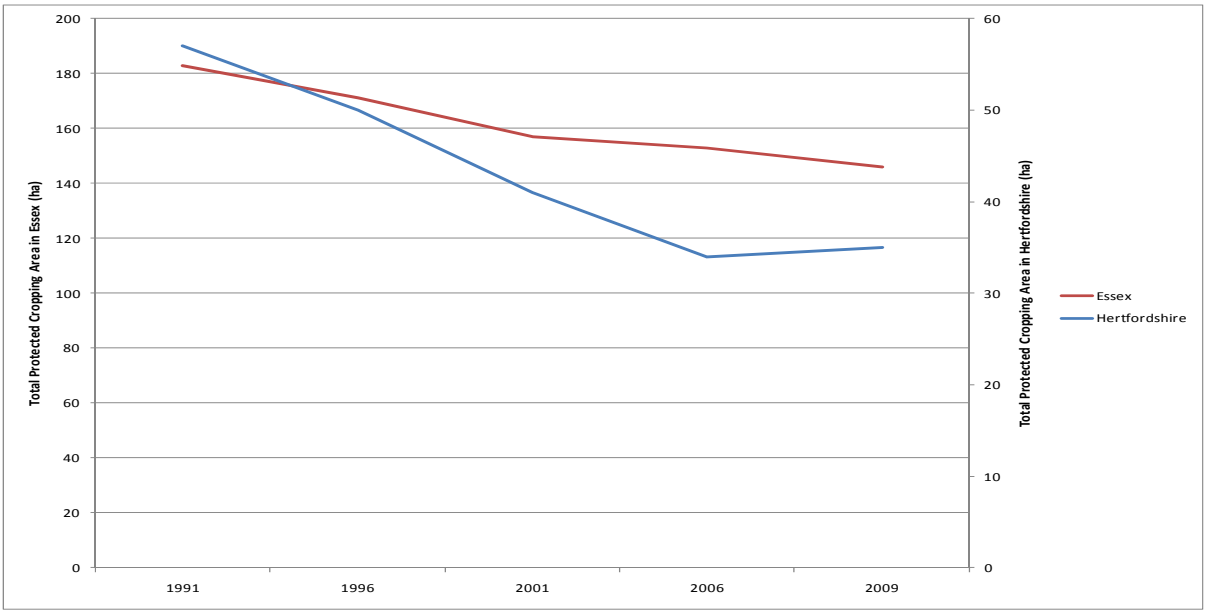


Figure 3 – Protected Cropping Area in Essex and Hertfordshire (DEFRA June Census, 2009)

Protected vegetable cropping (in terms of area) has been in steep decline for the last 18 years but this trend appears to have halted, or at least paused, since 2005 (see Figure 7). There is no information available to assess the correlation between the declining area and glasshouse height but it is considered that there may be some correlation between these two factors. Both of these factors will also be related to increases in the gross output by area.

Despite a slight increase since 2003 in the total protected cropping areas of tomatoes, cucumbers and sweet peppers, the longer-term trend (since 1985) remains a significant decline (Figure 4 overleaf).

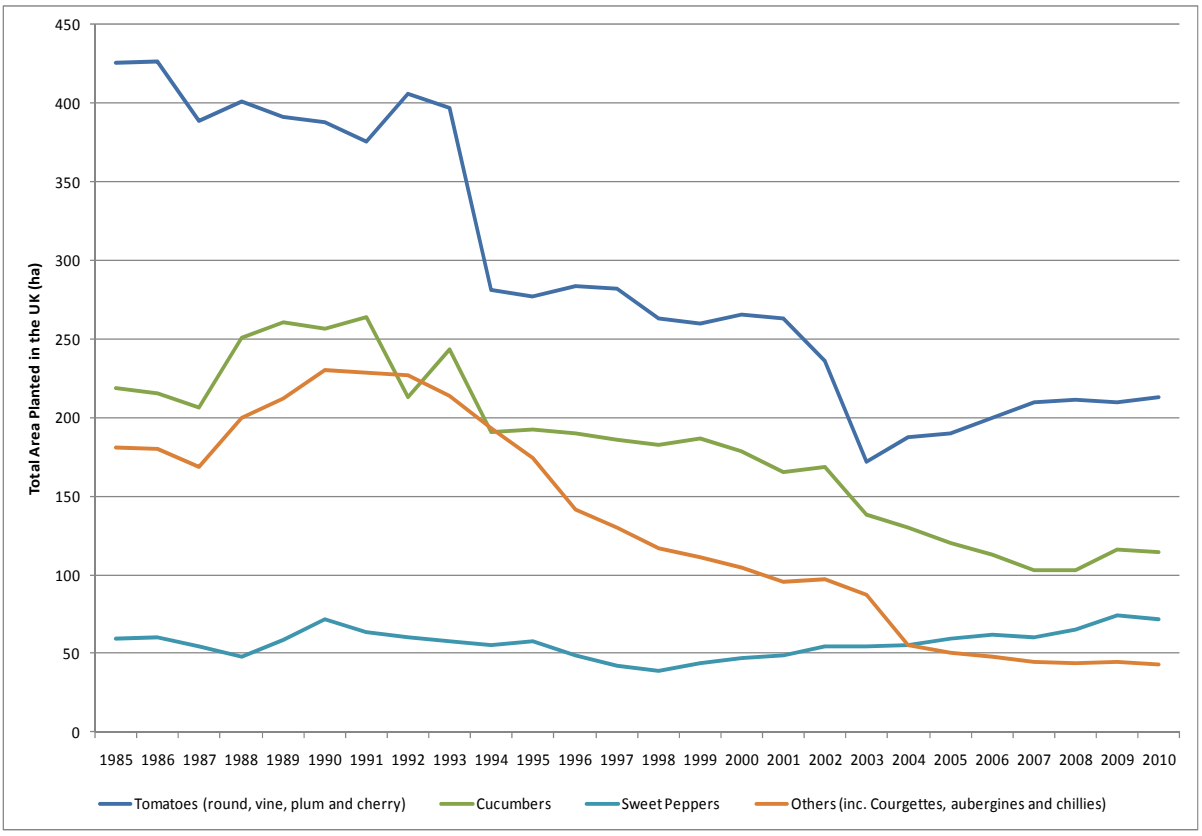


Figure 4 – Protected Vegetable Cropping Areas (DEFRA Horticultural Statistics, 2011)

Nationally, tomatoes represent nearly half (48%) of the total protected cropping vegetable area with cucumbers 26%, sweet peppers 16% and other crops 10% (Table 3). Cucumbers represent 34% of output (by tonnage) from 26% of the productive area.

	UK Area (Ha)	UK Output ('000 tonnes)
Tomatoes[3]	213	89.3
Cucumbers	114	64.6
Sweet Peppers	72	19.2
Others[4]	43	16.2
TOTAL	**442**	**189.3**

Table 3 – Planted Area of Protected Cropping Vegetables (DEFRA Horticultural Statistics, 2011)

The recent national trend for a slight rise in protected cropping area has not been reflected in the Lea Valley in terms of applications and/or approvals for planning consent. Predominantly the increases are a result of expansion in other parts of the country – in the main 'super glasshouses' at Thanet Earth (Kent) and large scale developments at Billingham (Stockton-On-Tees) and Wissington (Norfolk) (Figure 5) which account for 53 ha on these 3 sites alone. Industry reports and analysts expect that the trend towards larger units on single sites will continue in the future.

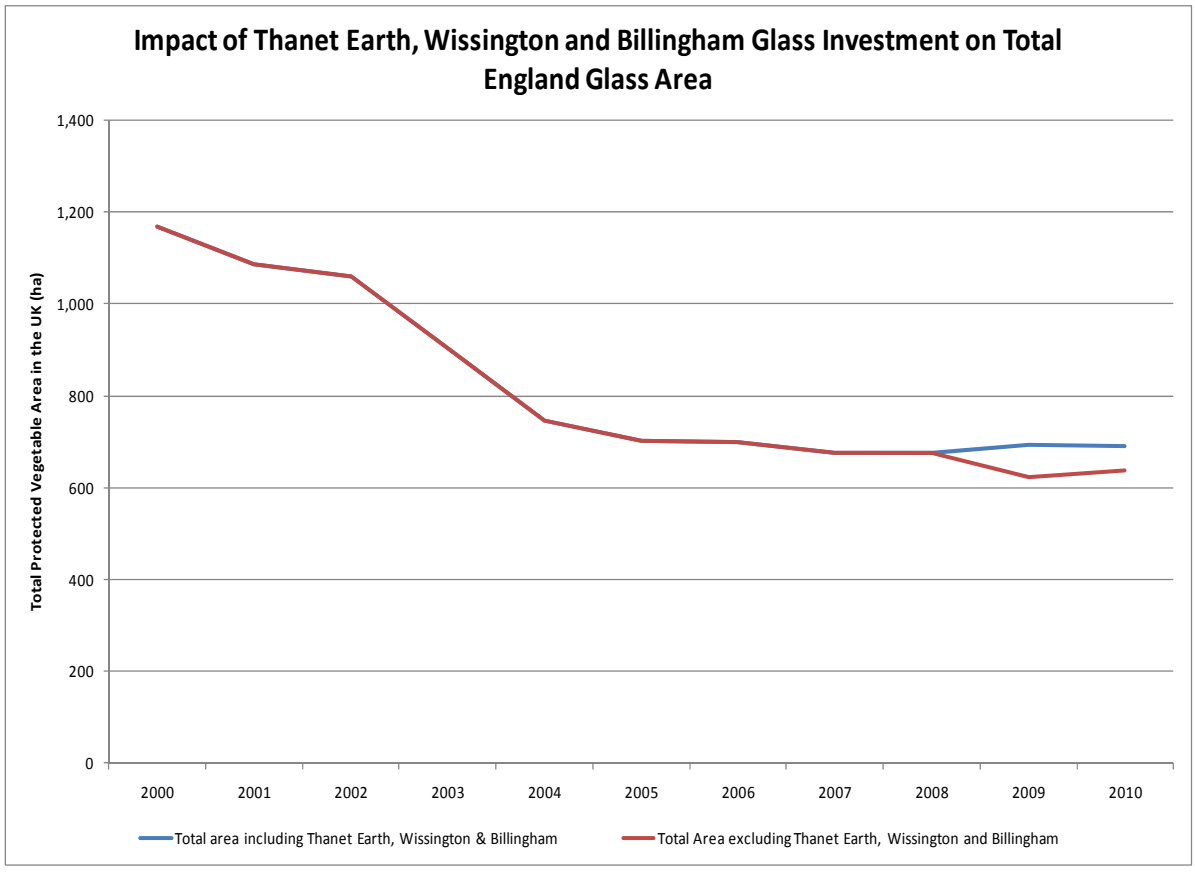


Figure 5 – Impact of Thanet Earth, Wissington and Billingham on Total Protected Cropping Area

[3] *Includes round, vine, plum and cherry varieties*
[4] *Includes courgettes, aubergines and chillies*

(DEFRA Horticultural Statistics, 2011 & Thanet Earth Website (www.thanetearth.com), 2011)

According to the Lea Valley Growers' Association (LVGA) the area of glass in the Lea Valley has declined by 86% since 1951.

In the period 1985 – 2004 (DEFRA stopped publishing ornamental cropping information in 2004) protected ornamental cropping increased significantly (Figure 6). This was largely due to the changing supply chain for the ornamental sector. Growers in the Lea Valley historically sold plants to wholesale and small retailers (i.e. corner shops), however, the demise of the small retailer along with the emergence of supermarkets, large chain garden centres and DIY retailers mean the majority of ornamentals now go to the retailer supply chain. This has resulted in the development of a small number of large sites in the Midlands and the South Coast whilst smaller sites persevere. This has resulted in the increase in total area but is unlikely to be a long-term trend.

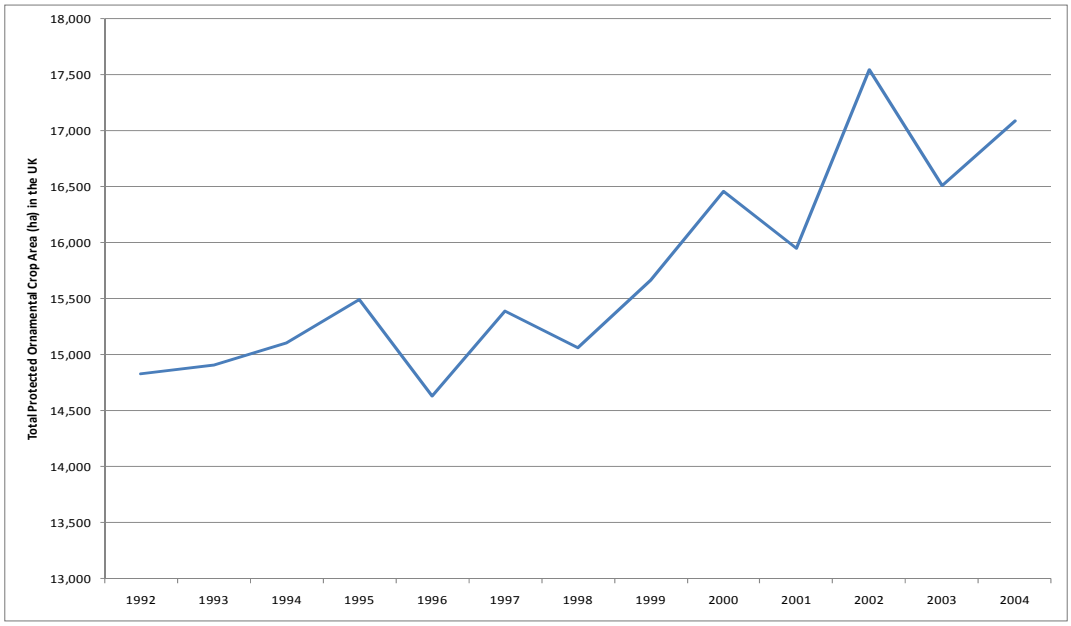


Figure 6 – Protected Ornamental Crop Area in the UK (DEFRA Horticultural Statistics, 2011)

Unit Size

The average size of a horticultural glass business in the UK increased by 172% between 2008 and 2009 (Figure 7). The average glasshouse area per unit has more than doubled in four years. Although a breakdown of the information is not available this is almost certainly as a result of the three large projects referred to above (which average 17.7 hectares). The average unit size rose from 1.27 hectares to 3.45 hectares. However, notwithstanding the recent increase in average unit size a large number of glasshouse businesses are below the size, which growers believe is financially viable. The DEFRA data show a decline in 2010 although the reason for this is unclear.

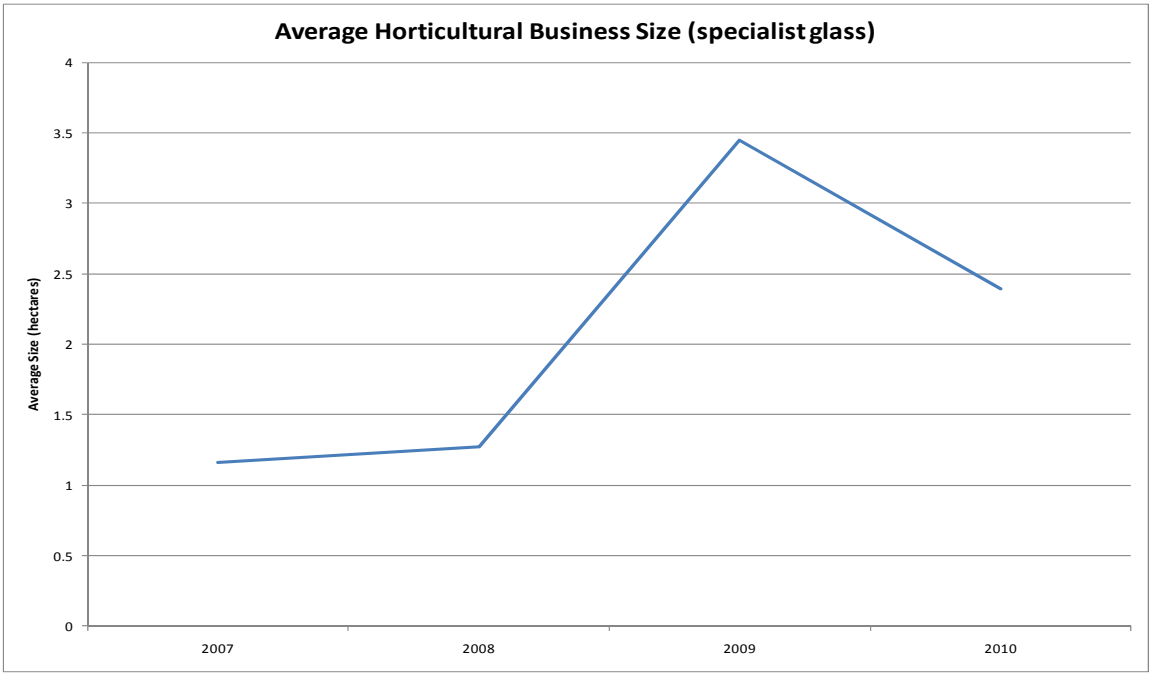


Figure 7 – Average Horticultural Business Size – specialist glass (Farm Business Survey 2006/2007 - 2009/2010)

While there are no detailed statistics published by DEFRA, the recent survey of Epping Forest and the Lea Valley showed that the average unit size is much lower than the UK average. It is broadly agreed that there are approximately 60 active growers in the Lea Valley and this research suggests the total area of active glass is circa 75 hectares (an average unit size of 1.25 hectares). This is significantly below the minimum size unit for financial viability indicated in the growers' survey.

Output & Yields

During a period of significant decline (1985 – 2010) in the protected cropping area the marketed yield has shown significant improvement. The net result is that in the tomato sector, despite a 50% decline in area, total production has fallen by just 4%. The position is the same in respect of cucumbers with a 48% decline in area resulting in a 4% decline in marketed tonnage. In the sweet pepper market the production area has increased by some 21% but marketed tonnages have risen by over 650%. The graphs below (Figure 8 and Figure 9) demonstrate the increase in output:

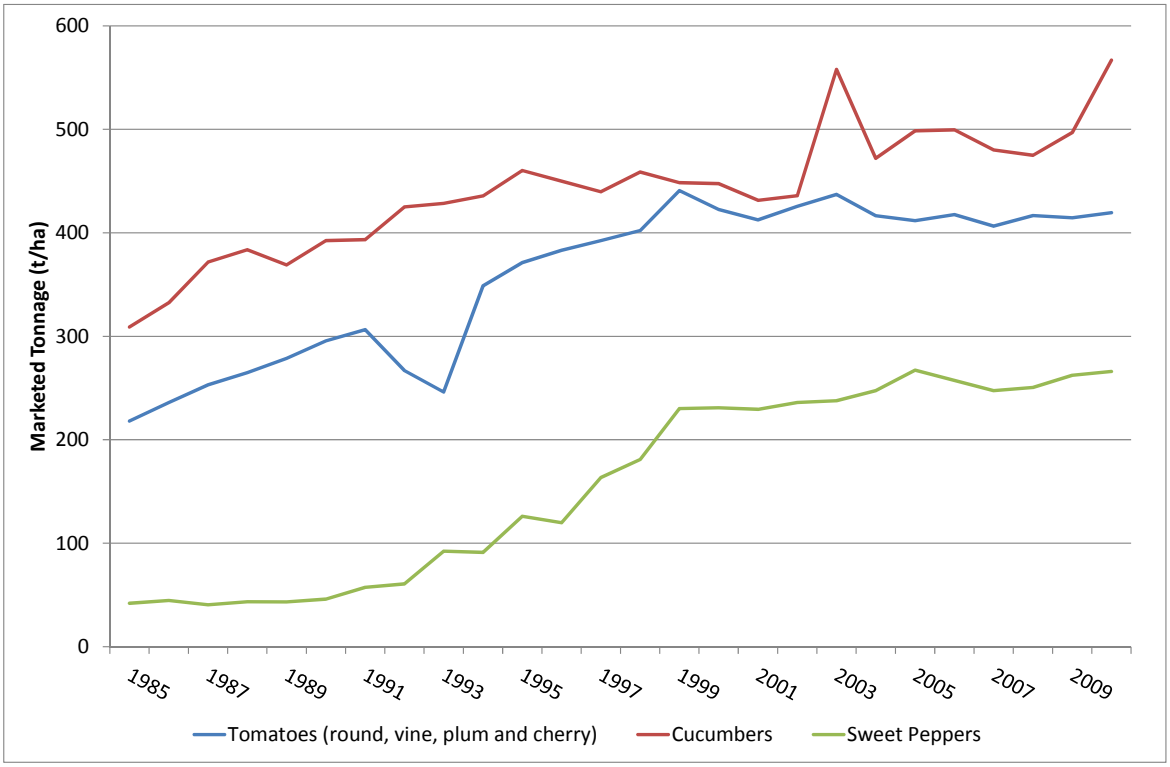


Figure 8 – Marketed Yield from UK Production (DEFRA Horticultural Statistics, 2011)

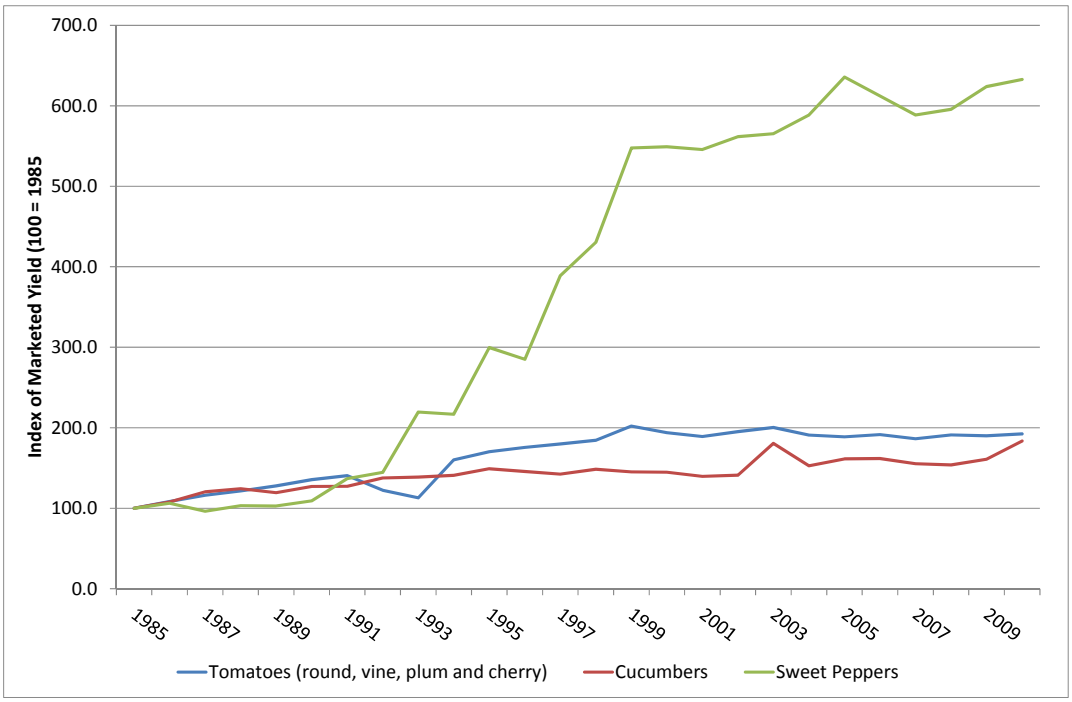


Figure 9 – Index of Marketed Yield from UK Production (Data from DEFRA Horticultural Statistics, 2011)

In the last 25 years the yield of tomatoes and cucumbers (per hectare) has nearly doubled whilst the yield from sweet peppers has increased nearly 6 fold. Despite this, the total domestic production of tomatoes and cucumbers has been declining (Figure 12). The total value of home grown marketed produce from the protected vegetable cropping sector declined steeply between 1996 and 2004. Since 2004 there has been a significant increase in the total value despite reduced

total production. The overall trend over the last 25 years has been increasing value of home grown vegetables, but within this trend there has been significant volatility.

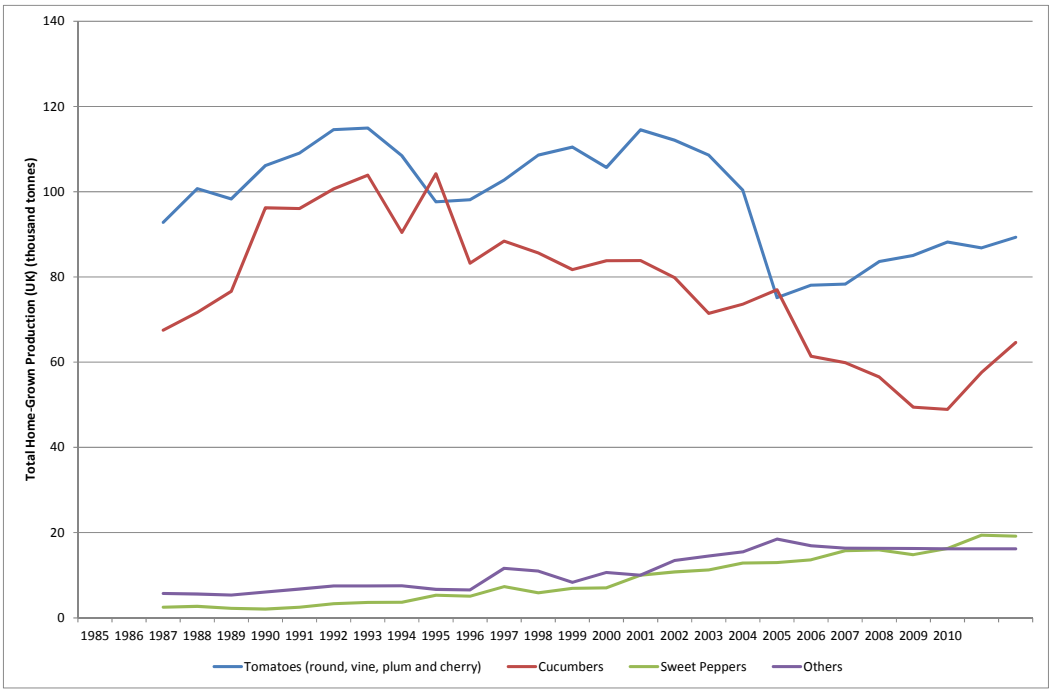


Figure 10 – Total Home Grown Production (DEFRA Horticultural Statistics, 2011)

The value per planted hectare is highest in tomatoes and has been steadily increasing over the last 25 years (Figure 13). This is on the back of both increased yield and increased farm gate price.

The gap between tomatoes and cucumbers on the value per hectare basis was comparable until the cucumber price dipped steeply in the mid-1990s. Other crops (including aubergines) have been on a steady rising trend since 1999.

The value per hectare of tomatoes, cucumbers and sweet peppers increased sharply since 2008/2009. This correlates directly with the relative weakening of sterling against the Euro, which has made European imports less competitive.

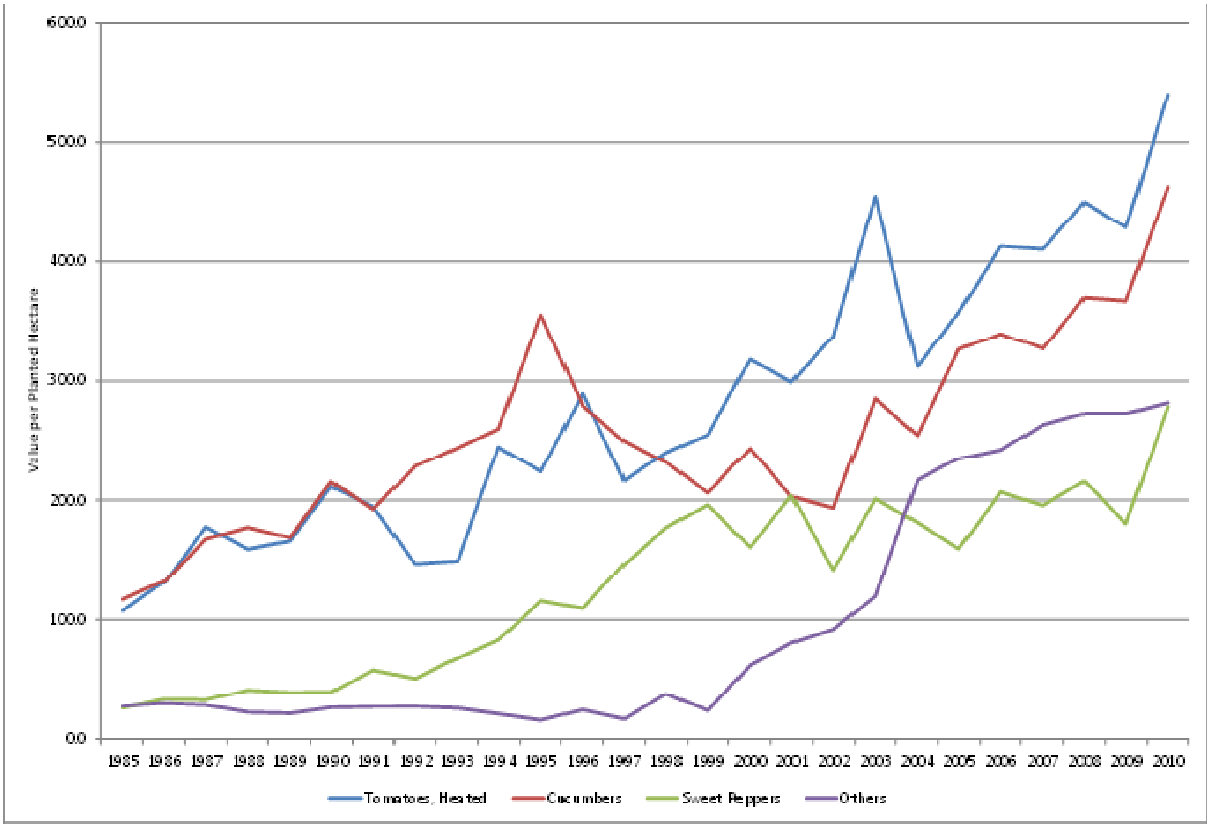


Figure 11 – Value per Planted Hectare (DEFRA Horticultural Statistics, 2011)

The total value of home grown produce from the protected fruit sector has risen in line with increased net area (Figure 12).

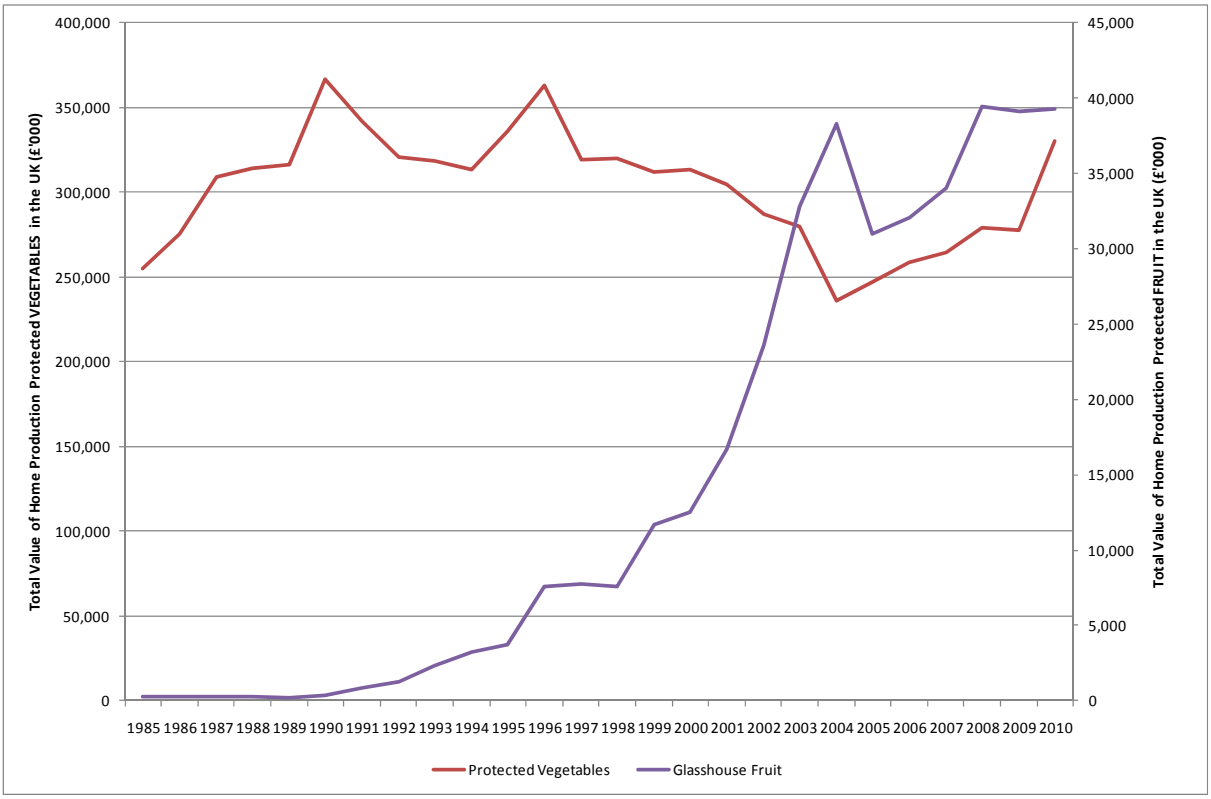


Figure 12 – Total Market Value of Home Produced Protected Fruit and vegetables (DEFRA Horticultural Statistics, 2011)

The Lea Valley produces 75% of the UK's cucumbers (Lea Valley Growers Association, 2011) – an output of 48,500 tonnes per annum (estimated value £39.6 million). However, the total area of tomatoes has fallen from 283 hectares in 1951 to just 2 hectares in 2010 (a 99% decrease) – roughly 849 tonnes per annum (estimated value £1.09 million).

Trade Balances

The total value of home produced fruit and vegetables in 2010 was £1.83 billion – an increase of £705 million since 1988. In the same period imports of fruit and vegetables rose in value by £3.09 billion to £4.42 billion and exports increased by £126.11 million to £164.48 million. In 1988 the value of imports exceeded home production value by £204 million. By 2010 this had risen to a deficit of £2.59 billion (Table 4). As the value of home production has not increased significantly (£1.13 billion to £1.83 billion from 1988 to 2010), this has led to a significant growth in negative trade balance for fruit and vegetables (£2.42 to £6.09 billion in the same period).

	1988 £billion	2010 £billion	Change (%)
Home Production (HP)	1.13	1.83	+61.9%
Imports (I)	1.33	4.42	+232.3%
Exports (E)	0.04	0.16	+300%
Balance (HP+I-E)	2.42	6.09	+151.7%

Table 4 – Trade Balance for Fruit & Vegetables 1988 & 2010 (DEFRA Horticultural Statistics, 2011)

In the tomato sector, declining home production and increased demand have been offset by rising imports (Figure 13).

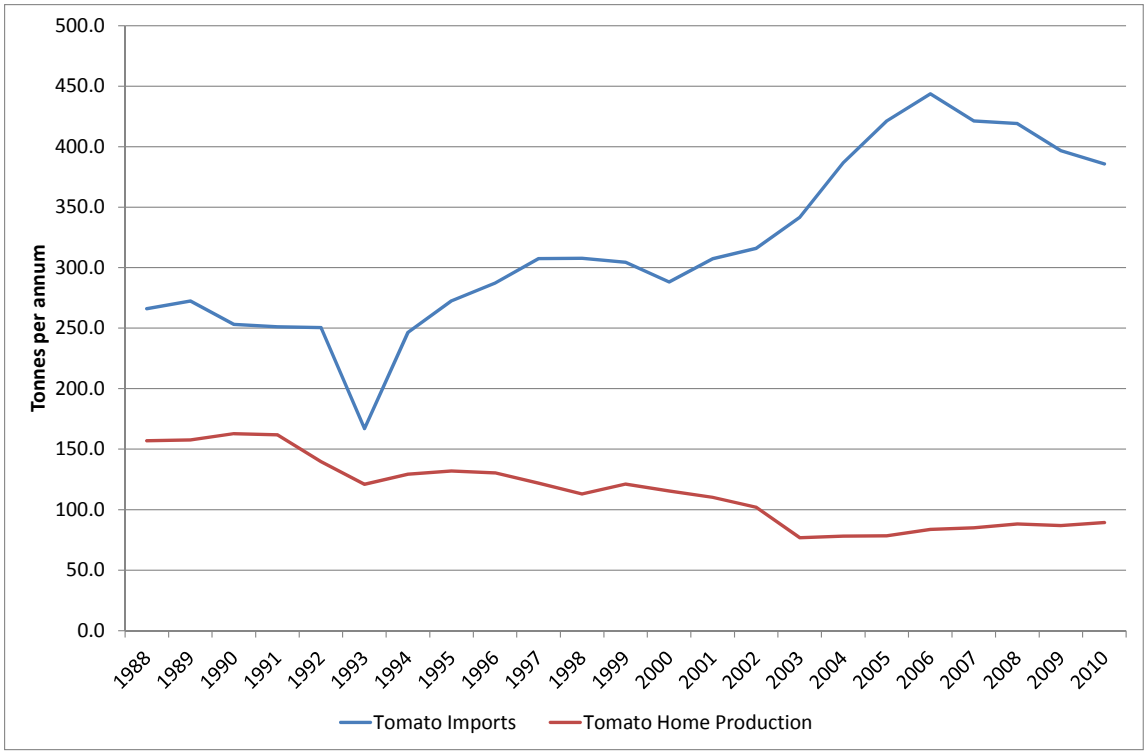


Figure 13 – Tomatoes UK Trade Balance (DEFRA Horticultural Statistics, 2011)

The situation is similar for cucumbers, although until 2000 and briefly again in 2002, home production accounted for a larger proportion of consumption than imports (Figure 14). There is, however, a growing negative trade balance in these crops because of low price imports.

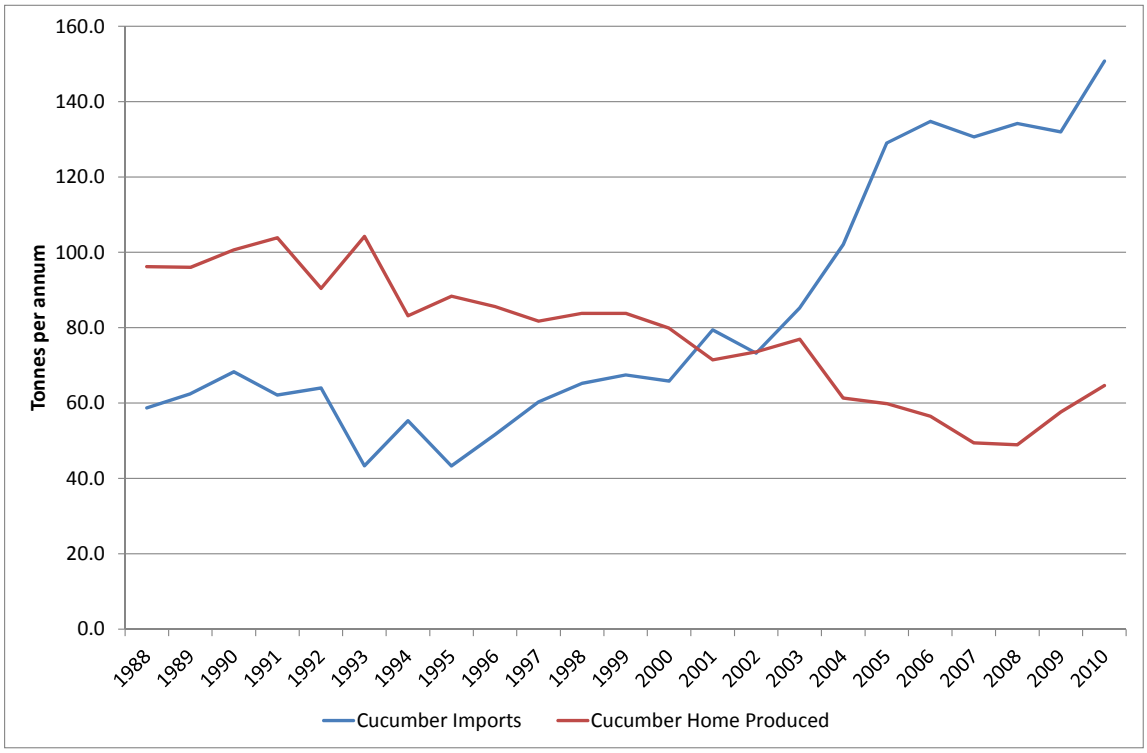


Figure 14 – Cucumbers UK Trade Balance (DEFRA Horticultural Statistics, 2011)

It is similar for sweet peppers with total home production in a rising trend but this is not able to match demand so imports have also risen (Figure 15).

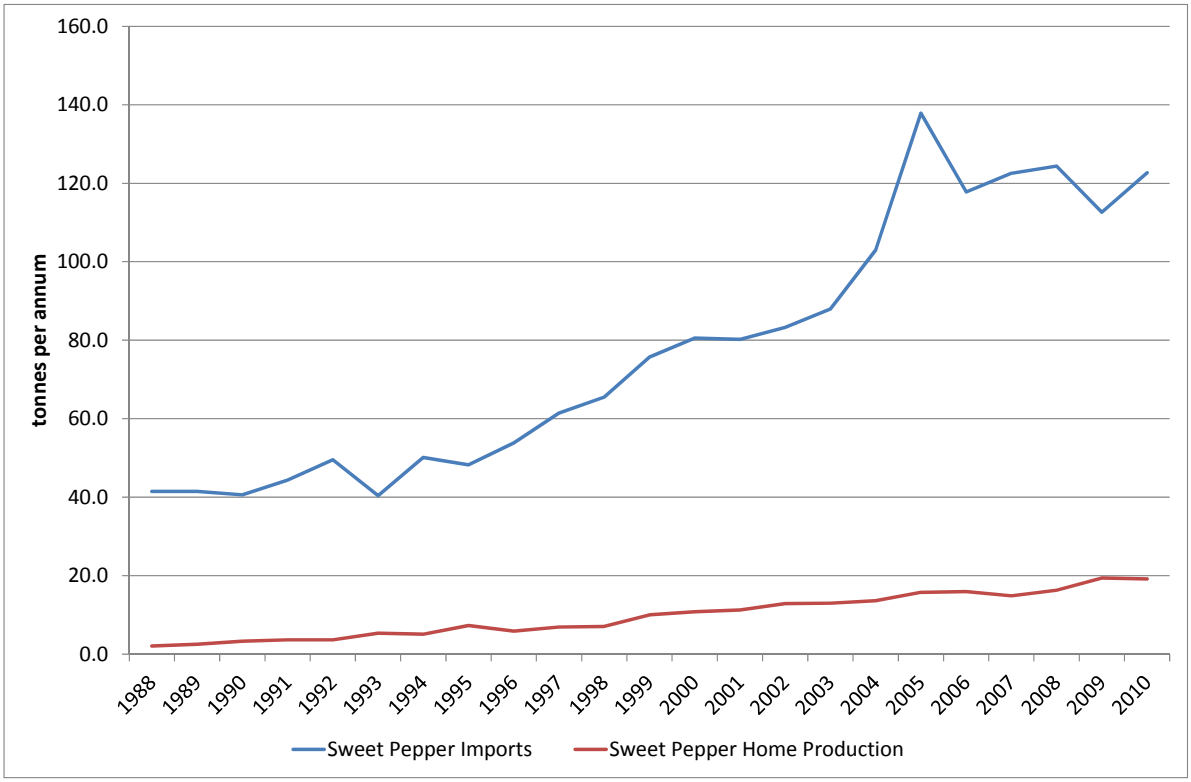


Figure 15 – Sweet Peppers UK Trade Balance (DEFRA Horticultural Statistics, 2011)

Although there is some element of seasonality in these figures they also demonstrate there is significant potential for increased output in the UK to offset imports particularly at a time when the relative weakness of the pound and consumer demand for local produce give home production a competitive edge.

Employment

Agriculture and horticulture employed 2,700 people in Epping Forest in 2010 – 4.8% of the working population (EEDA 2011).This compares with 2.0% nationally and 1.8% in the rest of Essex. The Lea Valley glasshouse sector represents nearly 40% of the total agricultural and horticultural employment in the district.

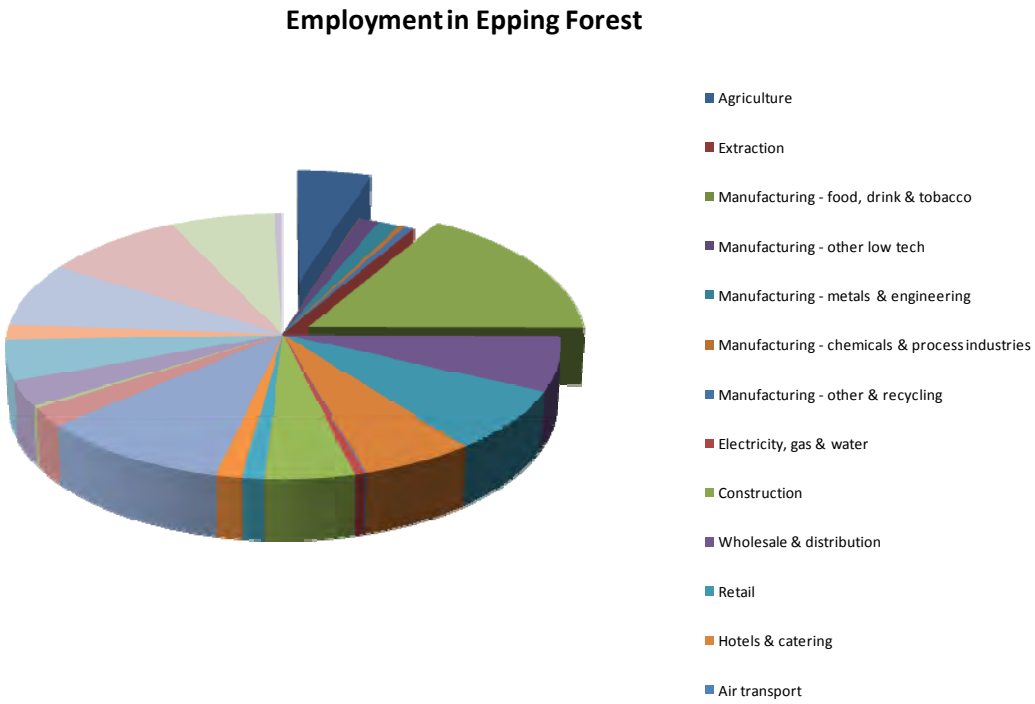


Figure 16 – Employment by Sector – Epping Forest (Annual Business Inquiry (ABI), Office for National Statistics and Oxford Economics, 2011)

Glasshouse production has the potential to generate 14 – 15 FTE positions per hectare of production. Currently employment relating to glasshouse within the Broxbourne Borough is likely to be in the range of 70-80 FTE positions. The creation of just three 15 hectare sites would create in the region of 500 – 600 positions (excluding the employment created during construction).

Financial Outlook – General Commentary

The recent economic downturn has put financial pressure on many small businesses with the banks being (i) reluctant to lend money to small businesses; and (ii) faced with increasingly onerous lending criteria making it more difficult to obtain approval from credit committees to lend. The relative weakening of the pound against the euro has assisted the export markets whilst making imports less competitive.

Due to the longer-term trend of a strong pound (thus cheap imports) the cut flower market grown under glass has contracted with much of the area taken up by strawberries grown under glass resulting in a much longer domestic strawberry season. This is a trend not seen in the Lea Valley. The main reason for this is the size and potential size of units and the location of the larger strawberry growing businesses. The supply chain demands large output from individual growers to minimise the number of suppliers to the supermarkets. Given the current number and size of growers this is not a market that Lea Valley businesses can benefit from.

In 2010 (data published by DEFRA) total value of UK home-produced fruit and vegetables was £1.83 billion (vegetables accounting for £1.26 billion). Protected cropping accounted for 26% of the vegetable crop output and 18% of all fruit and vegetable output.

Horticultural Prices

Fresh vegetable producer prices dipped slightly in 2008 – 2009 but rose again between 2009 and 2010. The price for fresh vegetables was 32% higher in 2010 compared to 2005 (Figure 17).

In the tomato market there has also been significant volatility with:

- An upward trend in prices over the last 25 years increasing 144%;
- A significant jump in farm gate prices in 2010;
- The price only just recovering in 2009 to the level previously seen in 2002;

The upward trend for cucumbers is less dramatic. There was less volatility in the cucumber price during the period 1985 – 2010, although between 1995 and 2002, the price reduced by 42%. In 2010 it was only 5.6% higher than the average farm gate price in 1995. The price has been volatile throughout the period from 1985 to 2010. In general terms, prices were highest between 1988 and 1998, followed by a number of years of lower prices (2000 to 2009), although the price in 2010 was 70% higher than that in 1985.

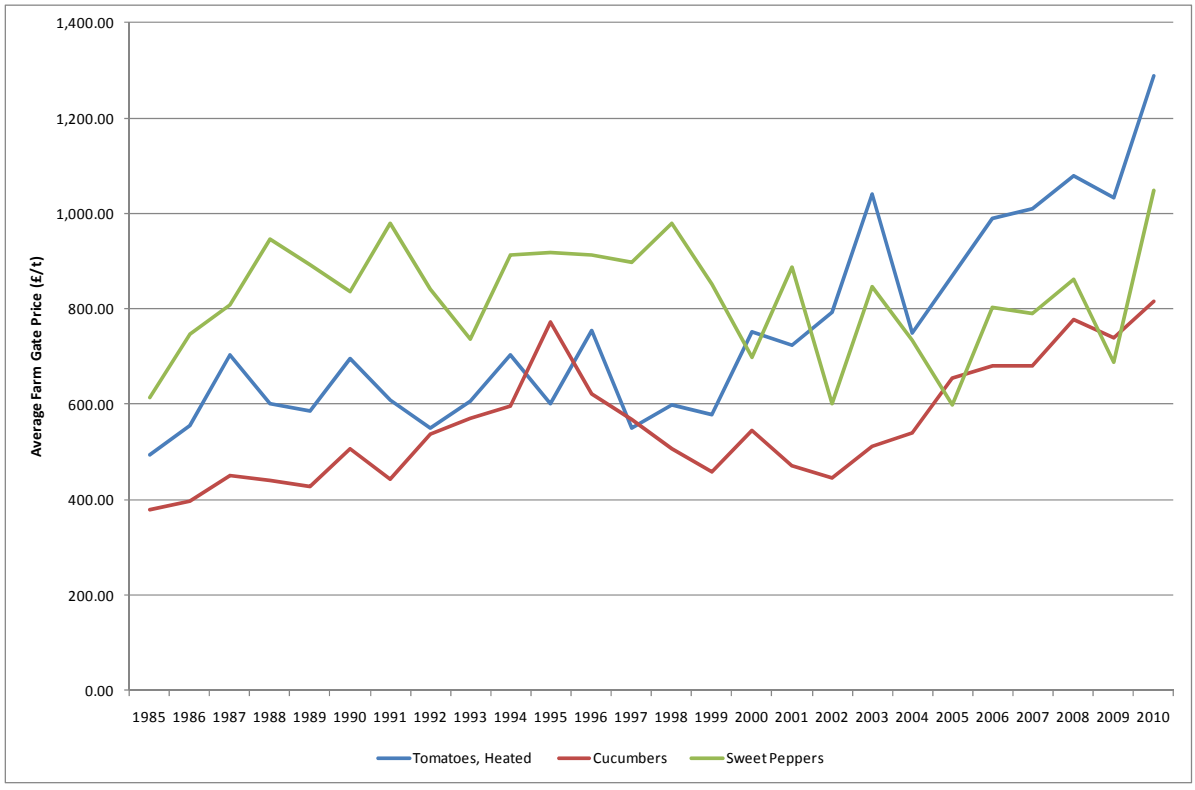


Figure 17 – Average Farm Gate Prices (DEFRA Horticultural Statistics, 2011)

Input Costs

Input costs and overheads have all risen very significantly in the last 6 years with the exception of the cost of finance. The greatest increases have been seen in fuel and fertilisers (directly related to the cost of fossil fuels), which have risen 38% and 62% respectively (Figure 18). By 2012 it is forecast that gas prices will have risen by 150% in three years.

In the Lea Valley fuel costs have risen from an average of £5.80 per m^2 (£58,000 per ha) to £9.40 per m^2 (£94,000 per hectare). With gas prices projected to rise to £1.00 per therm in 2012 this would take fuel costs to £14.50 per m^2 (£145,000 per hectare).

Across all inputs and overheads there has been an average increase in the cost of production for horticultural growers of 15% between 2005 and 2010.

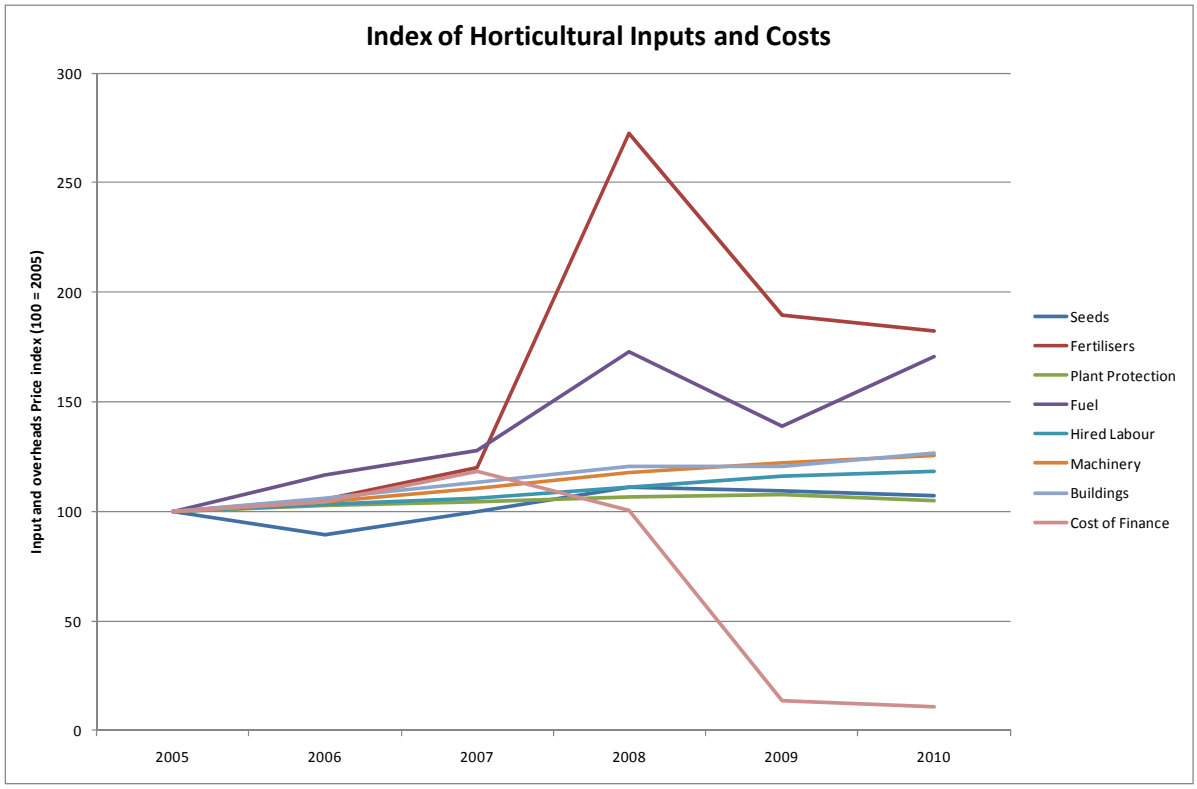


Figure 18 – Index of Horticultural Inputs and Costs (Farm Business Survey 2009/2010 Horticulture Production in England)

Performance – Specialist Glass

Table 5 below summarises the (per hectare) output from specialist glass horticultural businesses for the period 2009-2011:

	Financial Performance - £/ha		
	2009/2010	**2010/2011**	***% change***
Output from crops	121,075	205,170	*69%*
Seeds and plants	10,574	18,501	*75%*
Fertiliser and compost	3,858	6,454	*67%*
Crop Protection	1,423	1,519	*7%*
Market charges	9,598	16,605	*73%*
Packing materials	9,483	9,873	*4%*
Sundries	4,262	9,378	*120%*
Glasshouse fuel	15,352	24,605	*60%*
Other variable costs	2	14	*600%*
Variable Costs	**54,551**	**86,949**	***59%***
Gross Margin	**66,524**	**118,221**	***78%***
Labour	38,579	64,669	*68%*
Power and Machinery	12,426	19,098	*54%*
Rent (or imputed rent)	3,093	4,004	*29%*
Other overheads	7,053	11,456	*62%*
Total Overheads	**61,150**	**100,101**	***64%***
Management & Investment Income	5,374	18,119	*237%*
Minus management salaries, plus farmer and spouse	4,604	9,879	*115%*
Net Profit (including management and investment income)	**9,599**	**27,310**	***185%***

Table 5 – Specialist Glasshouse Businesses (mainly edible crops) Financial Performance (2009/2010 – 2010/2011) (Farm Business Survey 2010/2011 Horticulture Production in England)

Variable costs have risen by 59% in the most part related to rising seed and plant costs (75%) and marketing charges (73%). Despite this the gross margin increased by 78% on the back of a 69% increase in output. Labour costs (64% of all overheads) increased by 68%. Specialist glasshouse businesses spend proportionally less (compared to all horticultural businesses) on plant protection, seeds and plants but (unsurprisingly) much more on fuel for heating glasshouses.

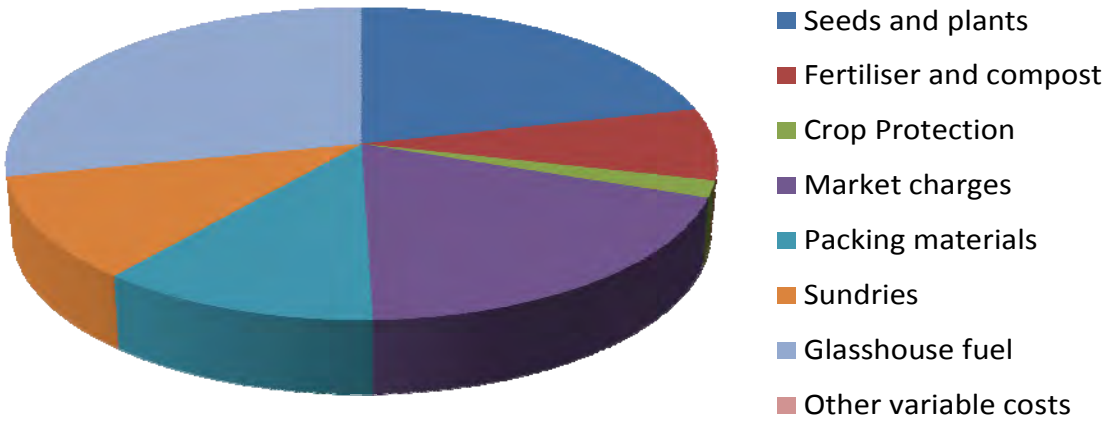


Figure 19 – Expenditure on Variables Costs - Specialist Glass Businesses (Farm Business Survey 2010/2011 Horticulture Production in England)

Labour, power and machinery represent over two thirds of the total overheads cost for specialist glasshouse businesses. This presents, potentially, two problems; the first is that labour and power are typically susceptible to inflationary pressure. In a recovering economy, with taxation rises driving inflation this could become in the next couple of years a significant issue for growers. The second issue relates to availability of casual labour for peak periods. With a changing economy in Eastern Europe and difficulties in recruiting domestic labour glasshouse businesses could see their labour cost rise and/or supply become very tight.

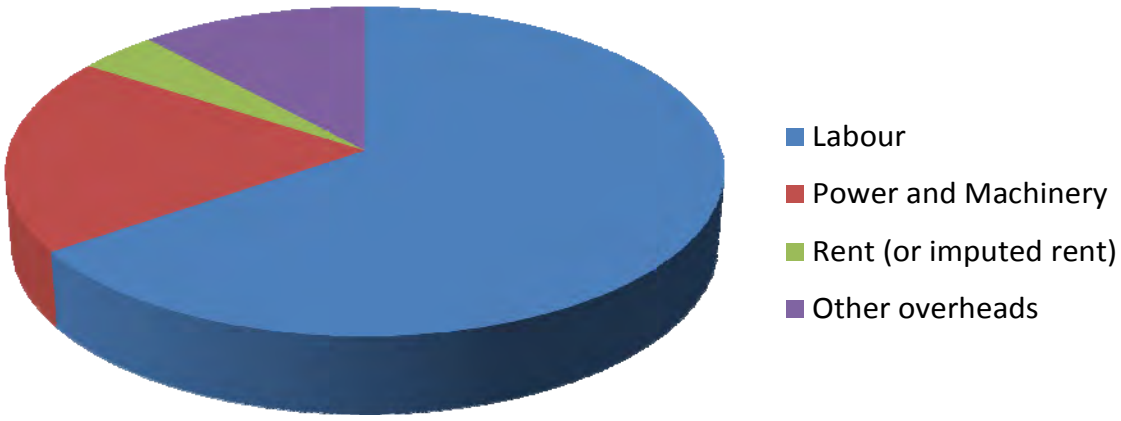


Figure 20 – Expenditure on Overheads Costs - Specialist Glass Businesses (Farm Business Survey 2010/2011 Horticulture Production in England)

Outlook – Specialist Glass

Although there has been a trend for rising producer prices, the economic downturn and supermarket competition mean that it is unlikely that producer prices will increase significantly in the next few years. Food inflation is currently (January 2012) in excess of 5%, however, this is more related to the increasing cost of imports (71% of all fruit and vegetables) rather than the return to the growers.

Input costs particularly fuel, seeds, fertiliser and plant protection are all anticipated to continue to rise significantly due to rising fuel and transport costs.

Inflation pressure is likely to see some labour costs rise but this could be offset by cheaper Eastern European labour (if the pound strengthens against the Euro) and rising domestic unemployment potentially increasing the supply (and so reducing the cost) of temporary labour. However, the potential end to Seasonal Agricultural Workers Scheme (SAWS) could place added pressure on labour availability and cost as will the pressures from cost of living and alternative employment because of proximity to the capital.

Benchmark Performance

Table 6 below summarises the output and gross margin of a typical salad producer:

	£ per 1,000m^2 (0.1 hectare)	% of Output
Sales	£39,955	100.00%
Plants & Seeds	£4,725	11.83%
Fertiliser	£1,020	2.55%
Sprays & Bio-controls	£1,525	3.82%
Energy	£12,810	32.06%
Labour	£10,382	25.98%
Marketing	£4,500	11.26%
Equipment & Sundries	£2,323	5.81%
TOTAL COSTS	**£37,285**	**93.32%**
NET MARGIN	**£2,670**	**6.68%**

Table 6 – Benchmark Gross Margin for Lea Valley Protected Salad Grower (Confidential industry source based on a number of growers actual performance)

The industry target is to achieve a net margin of 7% of turnover – however, in the last two years the result for most producers has only been 4-5%.

In 2003 Reading Agricultural Consultants estimated the turnover from the protected cropping sector to be £75 million. In 2011 Lea Valley Growers Association calculated the turnover for 2010 as £78 million (+4%). DEFRA information shows in the same period there was a 2.5% increase in farm gate prices. In the same period the DEFRA index of agricultural inputs (i.e. not weighted for higher levels of energy use) showed that agricultural inputs have increased by 59.3% (DEFRA, 2011). Focusing on the largest costs in the glasshouse sector between 2003 and 2010 heating oil increased by 99.2% and electricity 89.6%.

The table below summarises table 6 compared to the averaged responses from the growers survey:

	£ per 1,000m^2 (0.1 hectare)	
	Lea Valley	**Broxbourne**
Sales	£39,955	£64,808
Plants, fertiliser, seed, sprays, packaging and marketing	£14,093	£34,545
Energy	£12,810	£5,600
Labour	£10,382	£13,000
TOTAL COSTS	**£37,285**	**£53,145**
NET MARGIN	**£2,670**	**£11,663**

Table 7 – Benchmark Gross Margin Comparison for Lea Valley and Broxbourne Borough Growers (Confidential industry source based on a number of growers actual performance)

Points to note are:

- A higher proportion of growers in Broxbourne pre-pack produce which is probably why packing and marketing costs are higher;
- Most Broxbourne growers are lettuce/leaf growers which require lower energy inputs.

Appendix 2

Lea Valley Growers Association Letter

Lea Valley Growers Association
Lea Valley Specialist Glasshouse Branch
of the National Farmers Union

Established 1911, Supporting Growers for over 100 Years

Address	37-39 Turners Hill, Cheshunt, Hertfordshire, EN8 8NP
Telephone	01992 625 076, Fax: 01992 640 141
Email	LeaValleyGrowers@hotmail.co.uk
Web	www.leavalleygrowersassociation.co.uk

Keith Leddington-Hill
Managing Director
Laurence Gould Partnership Limited
Four Mile Stable Barns
Cambridge Road
Newmarket
Suffolk
CB8 0TN

10th October 2012

Dear Keith,

Re: Broxbourne Borough Council – Land Available for Glasshouse development

I refer to the above and to our recent meeting.

I can confirm that there are several growers interested in expanding their Glasshouse businesses within the Lea Valley and the borough of Broxbourne.

I trust this is to your satisfaction, however, please do not hesitate to contact me should you require further assistance.

Yours sincerely

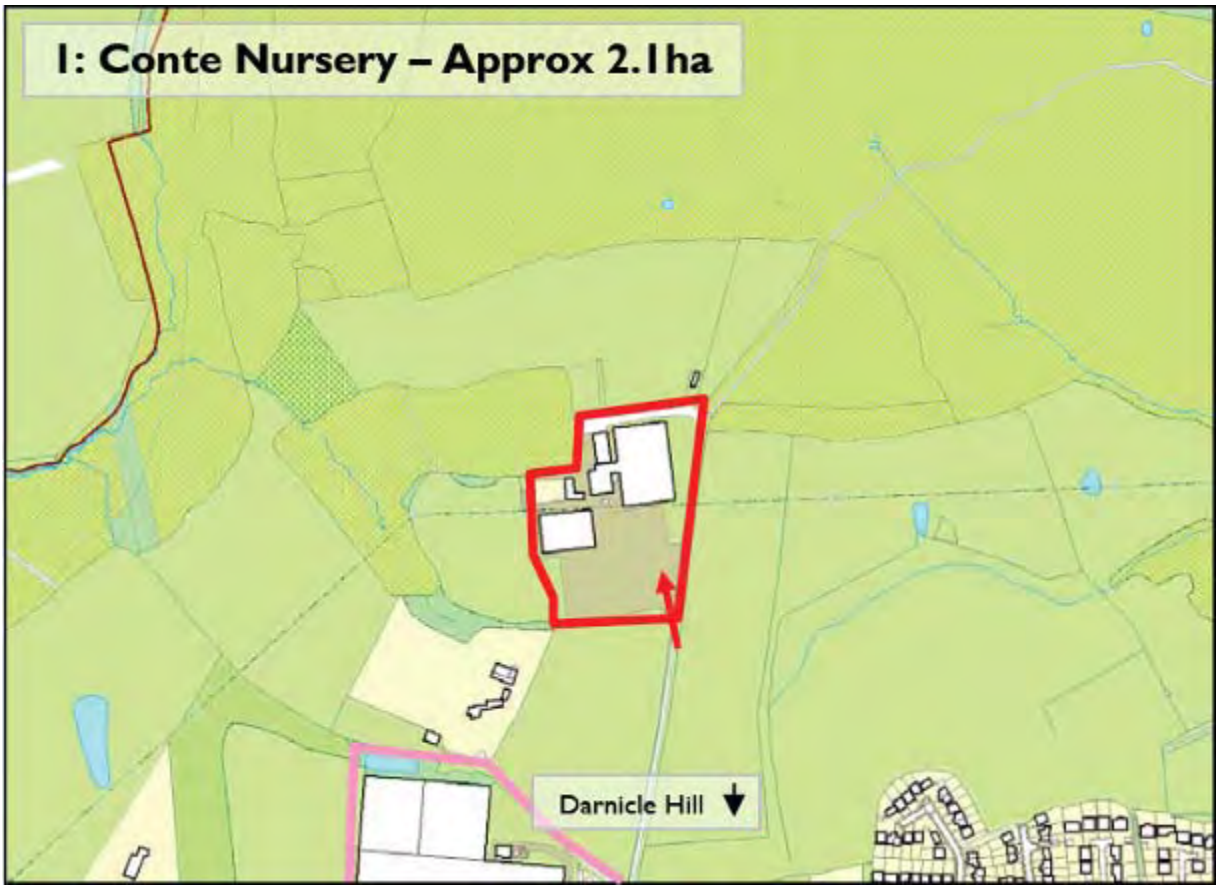
Lee Stiles

Lee Stiles
Secretary
Lea Valley Growers Association

Appendix 3

Full details of glasshouse sites in Broxbourne and their planning history

A more detailed analysis of each of the 17 glasshouse sites can be found on the following pages. The post-1980 planning history for each site is also shown (the broad period within which the local glasshouse industry has been in decline) – references shown in green are planning approvals, those listed in red are planning refusals, and those listed in grey are where breaches of planning control have been investigated.

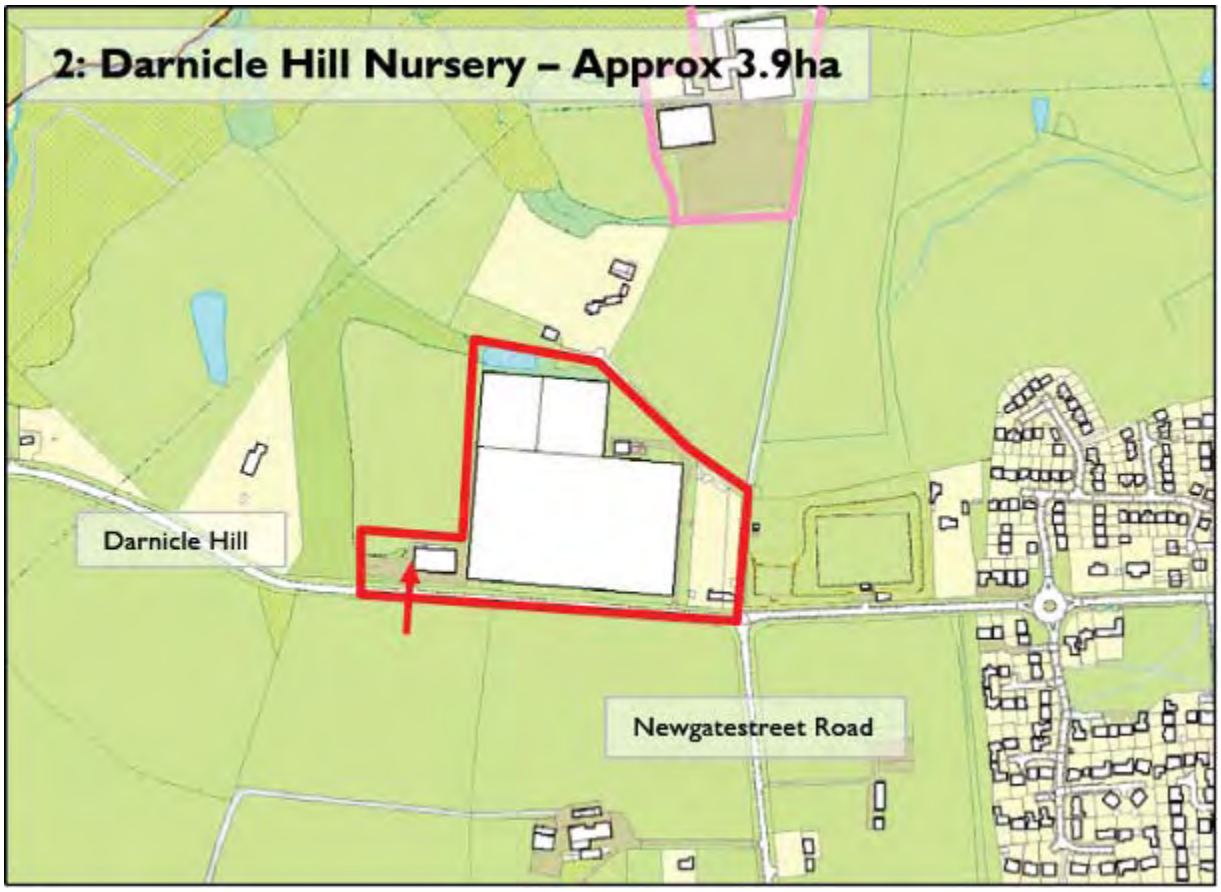


Nursery	Area	Growing	Grower	Marketed
Conte Nursery	2.1 hectares	Not in production	None	None

- The site owner is Michael Hammond.
- The site visit indicated that the site appears abandoned.
- The owner is looking for tenant for the site. In the short term, he may start to grow Christmas trees.

Planning History

2010 - COM/10/0495 *Site being used for landfill* (Breach of planning control investigated)
2007 - 7/954/07/FWOL *Conversion of barns to 3 dwellings, demolition of glasshouses* (Planning permission refused)
2001 - ENF13/01 & ENF14/01 *Building constructed for commercial swimming pool, buildings being used residentially* (Breach of planning control investigated)
1997 - 7/404/1997 *Erection of polytunnels* (Planning permission granted)
1994 - 7/533/1994 *Extension to glasshouse* (Planning permission granted)
1993 - 7/891/1993 *Erection of polytunnels and glasshouses* (Planning permission granted)
1991 - 7/656/1991 & 7/201/1991 *Erection of glasshouses* (Planning permission granted)
1990 - 7/396/1990 *Re-siting of propagating house* (Planning permission granted)
1989 - 7/704/1989 *New access road* (Planning permission granted)
1989 - 7/334/1989 *New propagating house* (Planning permission granted)
1989 - 7/081/1989 *Erection of glasshouses* (Planning permission granted)
1986 - 7/088/1986 *Change of use of site to horticulture and construction of new glasshouses* (Planning permission refused)



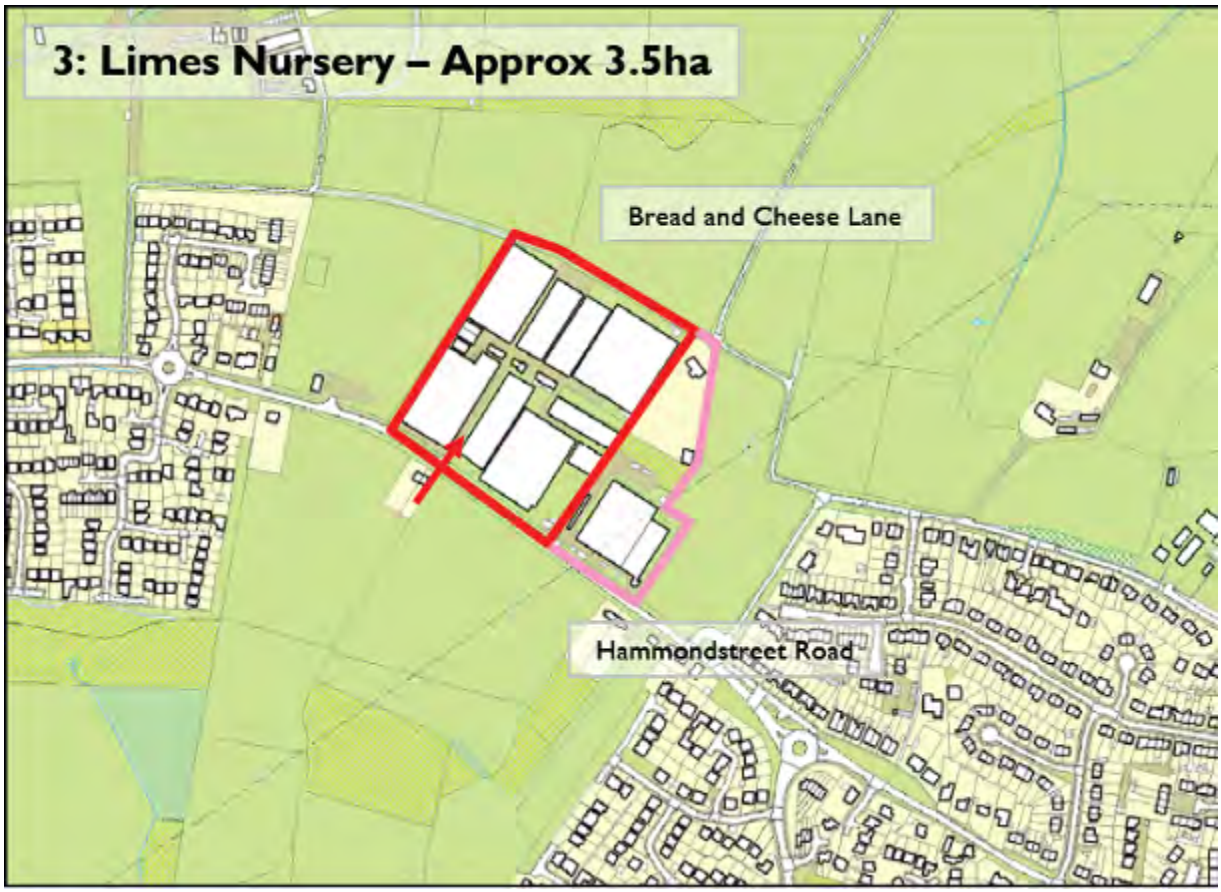
Nursery	Area	Growing	Grower	Marketed
Darnicle Hill Nursery	3.9 hectares	Lettuce production	Dingemans	Dingemans

- The site owner is Mark Sheppard, sole director and shareholder in L.A. Dingemans & Co Ltd (Company registration number 03872770).
- Currently in commercial lettuce production and is one of the largest glasshouse operations in the Borough.
- The latest set of trading accounts to 30th October 2010 at Companies House showed a net worth at £1.07 million, which except for a decline in 2009 accounts had been stable at over £1 million since 2007. Current assets have exceeded current liabilities since 2008.

Planning History

2002 – 7/0639/02/F/GO *Erection of peat silos* (Planning permission granted)


L.A. Dingemans & Co. Ltd.
Specialist Lettuce Growers
Darnicle Hill Nursery



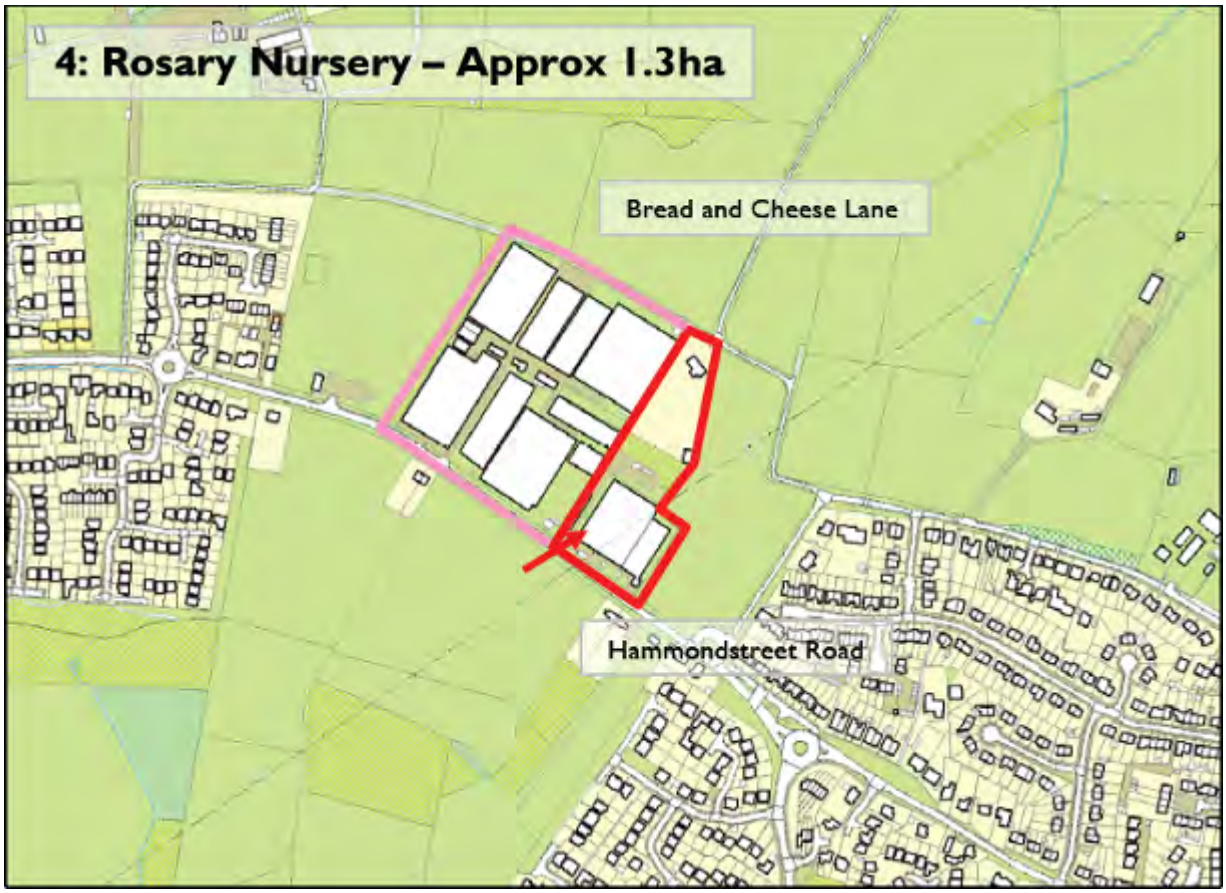
Nursery	Area	Details	Grower	Marketed
Limes Nursery	3.5 hectares (0.8 ha in production)	Lettuce production. Large proportion of glass is timber framed	Cifaldi & Cipullo	Cifaldi

- The site's operators and part-owners are Mr and Mrs Antonio Cifaldi. They rent the remainder of the site from Orlandi, Silventi and Teoli.
- The site has 5 FTE permanent jobs, and also employs around 6-7 seasonal workers each year.
- Currently, approximately 18% of the site is in production (lettuce) – the remainder is derelict, and has also seen some unauthorised uses - car sales, storage of haulage lorries and vehicle repair (2010 -2012).
- Lettuce production has seen problems with vandalism resulting in glass in crops, as well as leaves from trees on crops. This is affecting the viability of production. The owners are therefore unable to obtain insurance from the NFU because of the historical record of claims.
- The owners rent land at other locations in East Anglia and operate this as their central packhouse site – however, the access to the site by lorry is difficult, more so when cars are parked close to the site access.
- Comments from the 2005 Local Plan Inspectors Report show the state of the glass has remained relatively unchanged:

'Limes Nursery lies to the north of Hammondstreet Road between two residential estates developed after release from the green belt in the 1994 Local Plan. The land contains a number of glasshouses, some vacant but some still in horticultural production. The financial position of previously viable production areas may have deteriorated and new problems may have arisen resulting in the unsightly appearance of some parts of the site.'

Planning History

2010 to 2012 – COM/12/0109, COM/11/0376 & COM/10/0594 *Various breaches – site being used for car sales, storage of haulage lorries, vehicle repair* (Breach of planning control investigated)
2010 – 07/10/0876/F *Retention of packing shed (replacement for previous packing shed damaged by fire)* (Planning permission granted)
1998 – 7/584/1998 *Use of building for vehicle repair* (Planning permission refused)
1997 – ENF7/97 *Site being used for vehicle repair* (Breach of planning control investigated)
1996 – 7/037/1996 *Change of use of site to caravan storage* (Planning permission refused)
1990 – 7/242/1990 *Outline residential development* (Planning permission refused)
1988 – 7/242/1988 *Erection of glasshouses* (Planning permission granted)
1988 – 7/091/1988 *Erection of glasshouses and new storage warehouse* (Planning permission granted)



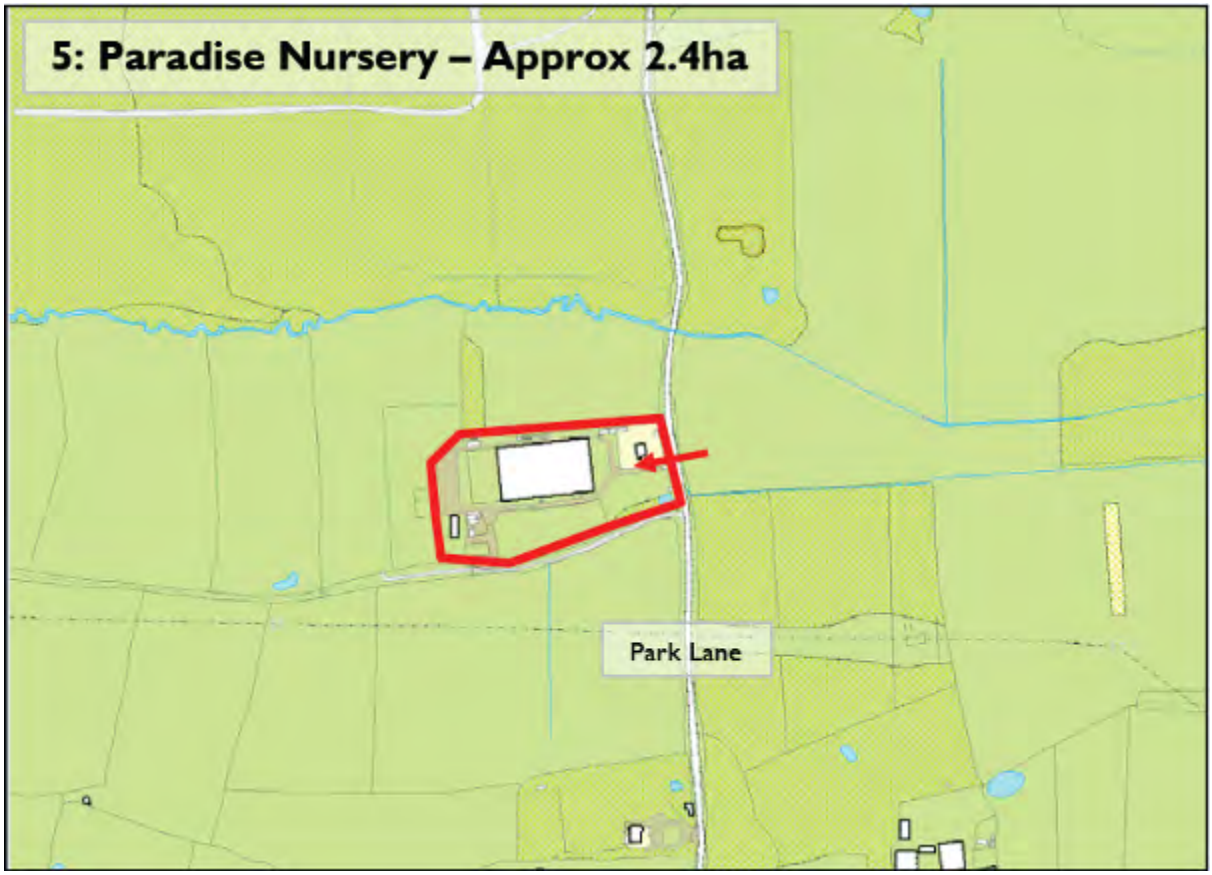
Nursery	Area	Details	Grower	Marketed
Rosary Nursery	1.3 hectares	Limited production, believed to be winding down. Timber framed glass.	Iameo	Iameo

- The site's owner is an elderly lady – the site has been rented out for approximately 30 years.

Planning history

None since 1980.


F & A IAMEO
THE ROSARY NURSERY
HAMMOND STREET ROAD
CHESHUNT
HERTS EN7 6PG

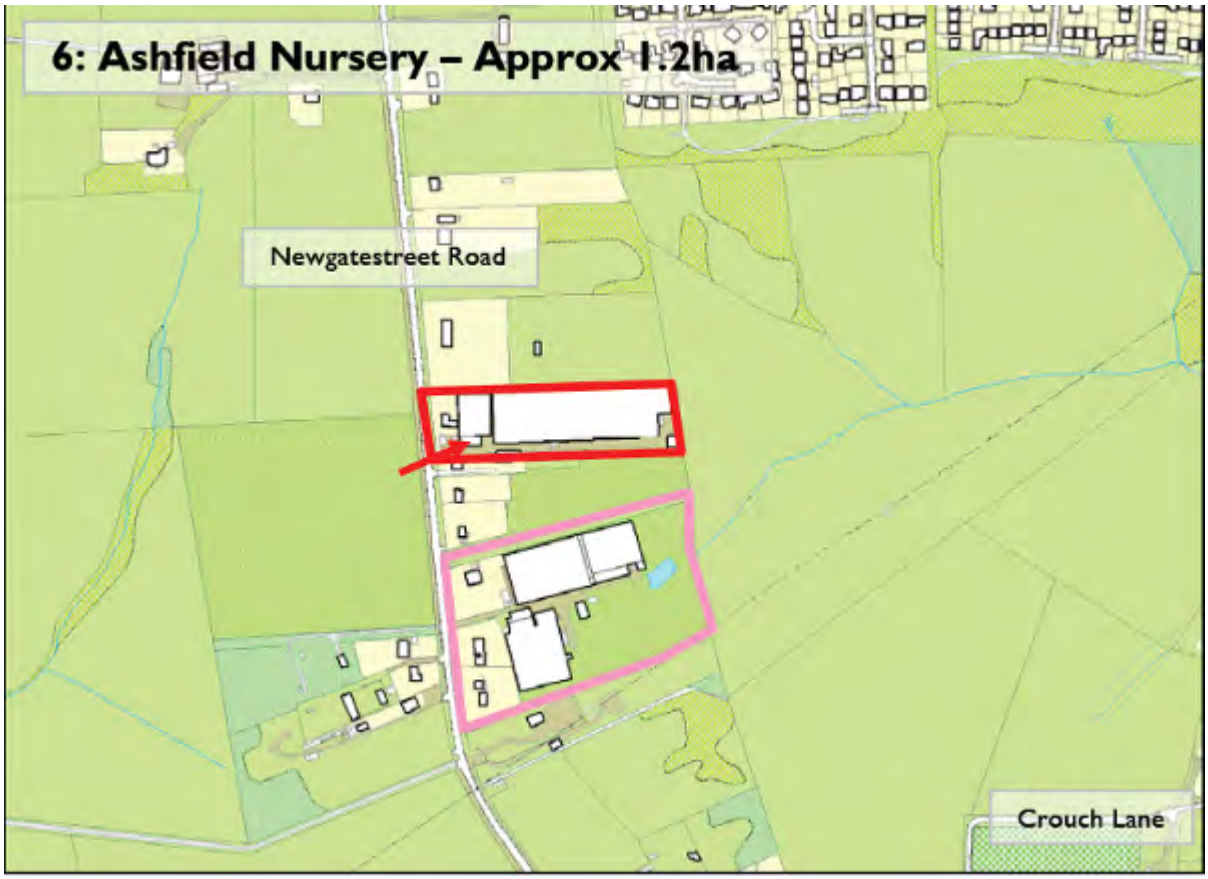


Nursery	Area	Details	Grower	Marketed
Paradise Nursery	2.4 hectares (0.4 ha in production)	Lettuce production Aluminium frame glasshouse	Mula	Dingemans

- The site is owned by Gaetano Mula
- The site has 2 FTE permanent jobs – an additional seasonal worker is also employed each year
- Currently 0.20 ha of the site is in production (lettuces)

Planning history

2011 – 07/11/0983/F *Formation of new access track* (Planning permission granted)
1992 – 7/714/1992 *Replacement of wooden glasshouses with aluminium framed glasshouses* (Planning permission granted)

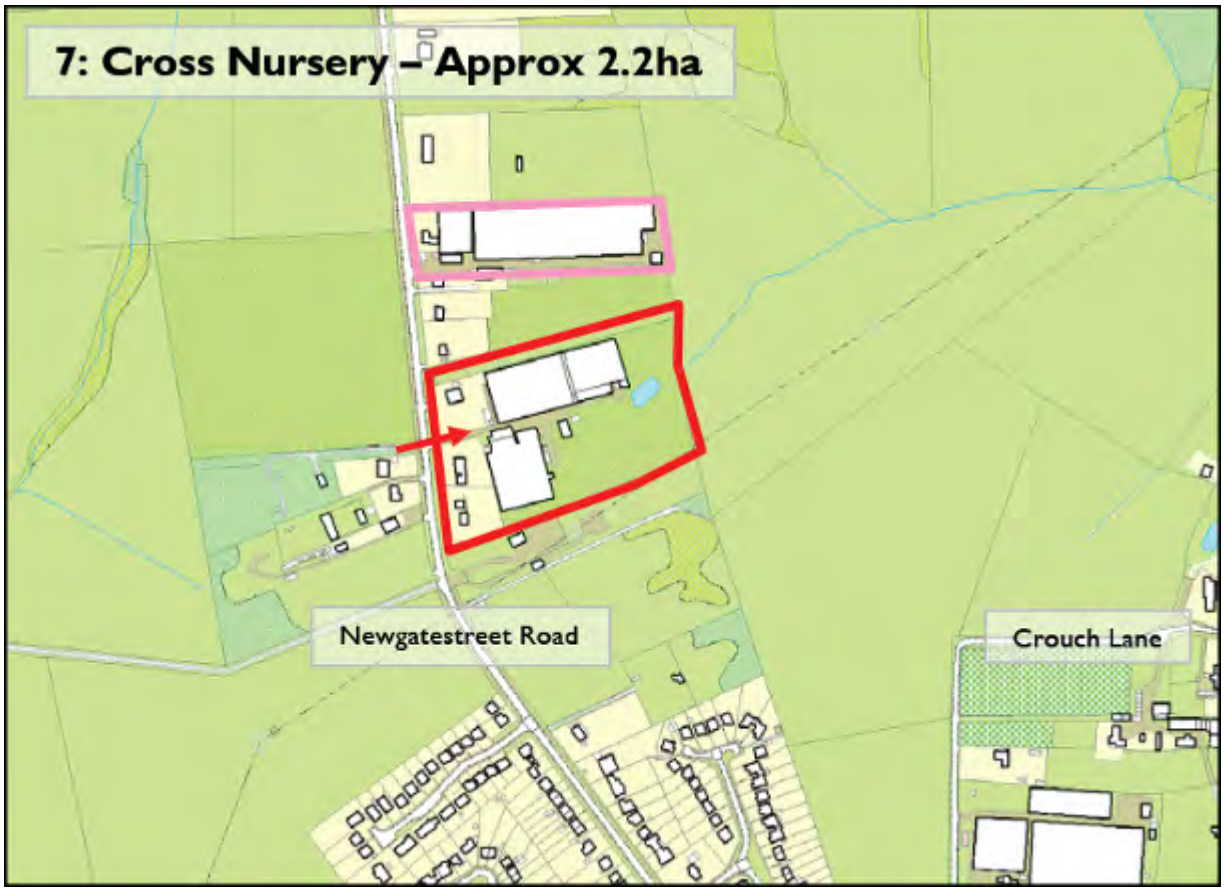


Nursery	Area	Details	Grower	Marketed
Ashfield Nursery	1.2 hectares	Sweet peppers (glass not suitable for standard peppers). Sold through Abbey View	Giardina	Abbey View

- The site is owned by Nicola Giardina

Planning history

1998 – 7/583/1998 *Extension to packing shed* (Planning permission granted)
1995 – 7/302/1995 *Demolition of a glasshouse, erection of garaged store* (Planning permission granted)

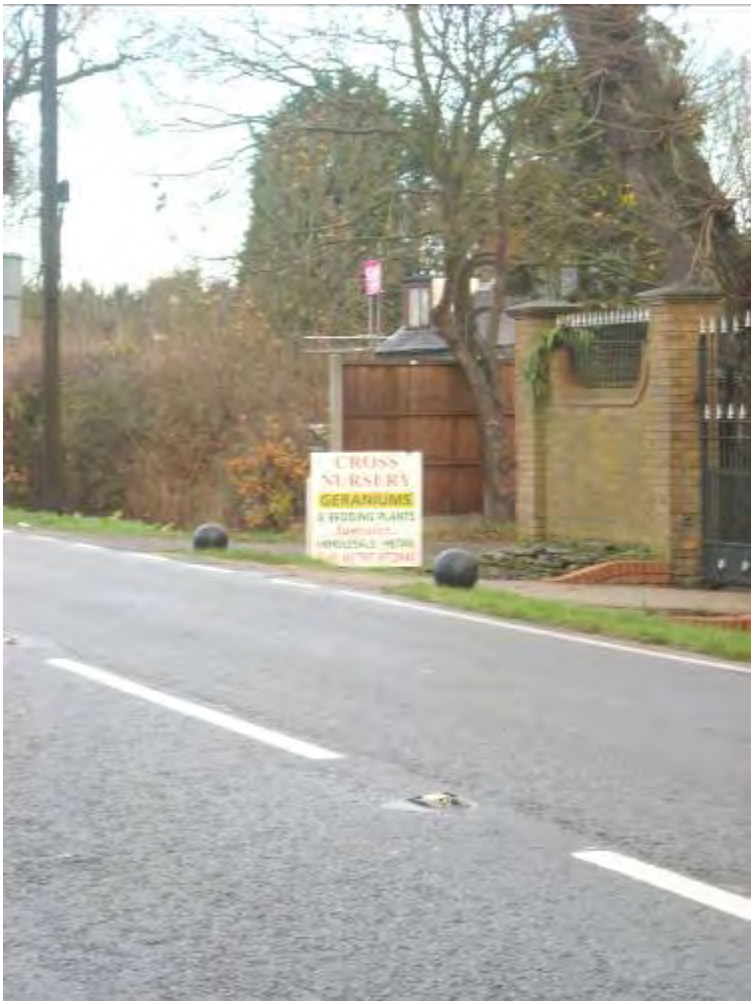


Nursery	Area	Details	Grower	Marketed
Cross Nursery	2.2 hectares (less than 0.4 ha in production)	Bedding plants	Samo	Samo

- The site is owned by Claudio Samo.
- The site is current in bedding plant production
- The site was viewed but no interview carried out. It would appear the state of the nursery is similar to that reported in 2005, when it was reported that '*a substantial part of the site is covered with vacant glasshouses in various states of dereliction, and some other outbuildings. Although some of the buildings and storage areas do not contribute much to the openness of the green belt, the site and its surroundings remain essentially rural in character.*'

Planning history

2000 – 7/489/2000 *Temporary wooden building for religious activities and associated car parking* (Planning permission refused)
1990 – 7/910/1990 *Single storey religious meeting room with associated car parking* (Planning permission granted)
1985 – 7/750/1985 *Erection of store building, glasshouses and polytunnels* (Planning permission granted)

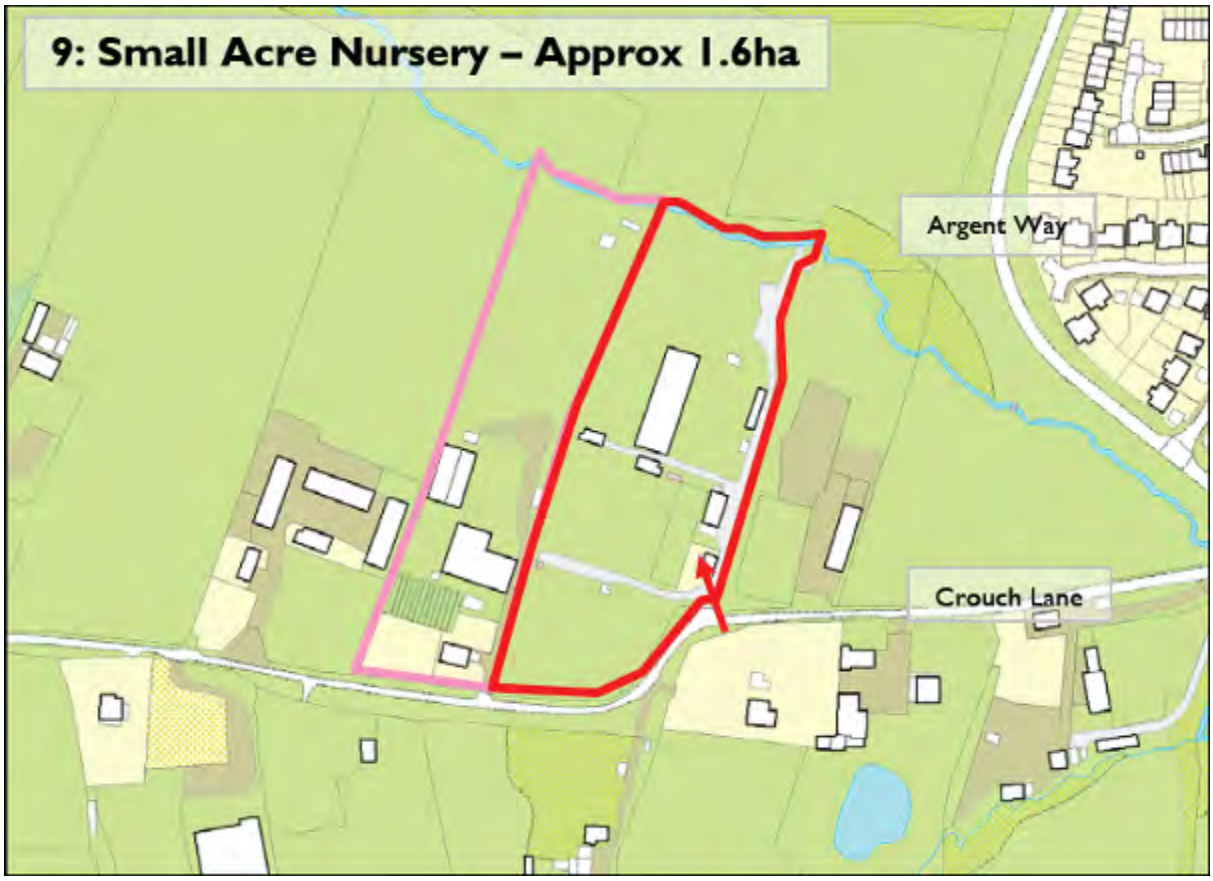

CROSS
NURSERY
GERANIUMS

Nursery	Area	Details	Grower	Marketed
Rushdown Nursery	1.2 hectares	Not in production	None	None

- The site is owned by Peter Duffy
- This site has not been in production since the 1970's, and there are no plans to invest for commercial production in the future.
- The Council noted that the site is untidy (2011) and investigated its use as a waste transfer station (2010).

Planning history

2011 – COM/11/0460 *Untidy land* (Breach of planning control investigated)
2010 – COM/10/0012 *Site being used for waste transfer* (Breach of planning control investigated)

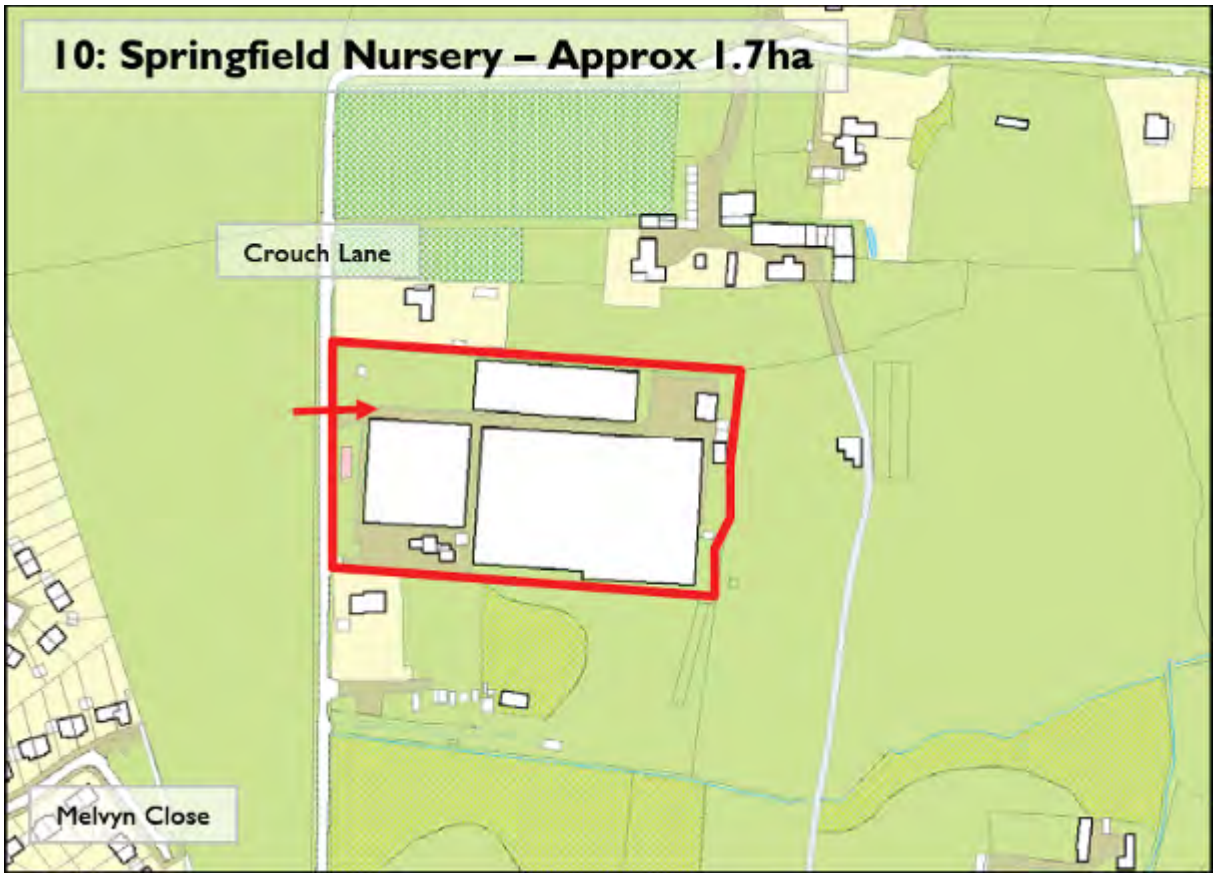


Nursery	Area	Details	Grower	Marketed
Small Acre Nursery	1.6 hectares	Not in production	None	None

- The site is owned by John Palmer.
- The glasshouse has not been in production for 30 years and is considered derelict.
- The Council note that the site is untidy (2011).
- The site would appear unchanged from the observations made in 2005 *"Much of Small Acre Nursery is covered with vacant glasshouses in various states of dereliction, and some other outbuildings, together with a dwelling house. The adjoining site appears to be used for storage and some car breaking."*

Planning history

2011 – COM/11/0459 *Untidy land* (Breach of planning control investigated)



Nursery	Area	Details	Grower	Marketed
Springfield Nursery	1.7 hectares	Rented to Cifaldi for lettuce production	Cifaldi	Cifaldi

- The site's owner rents it to Antonio Cifaldi (Limes Nursery)

Planning history

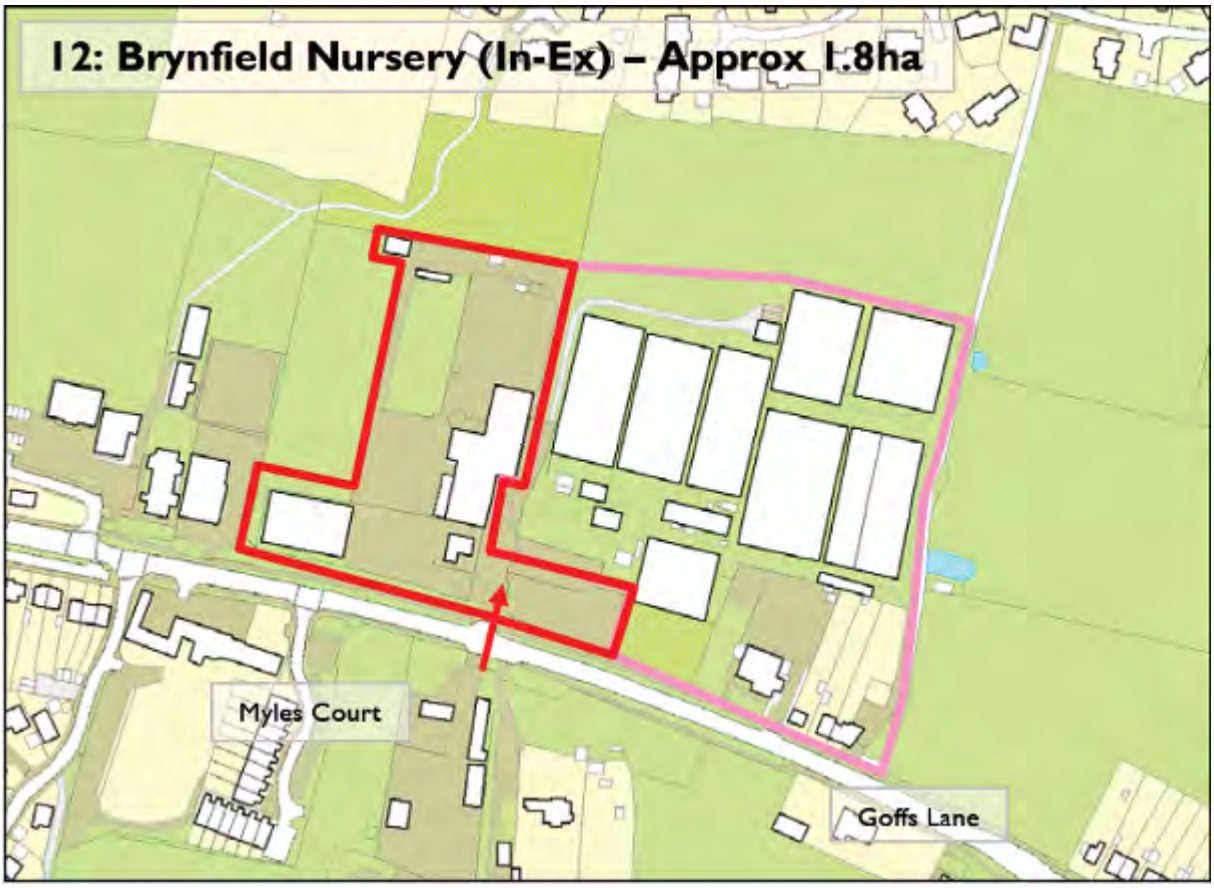
2010 – COM/10/0024 *Site being used for vehicle repairs and the dumping of oil* (Breach of planning control investigated)

Nursery	Area	Details	Grower	Marketed
Burton Grange Nursery	3.4 hectares (1.2 ha in production)	Owned by Abbey View Only viable as part of another, larger, business	Abbey View	Abbey View

- The site is owned by Abbey View Produce Limited
- The site is currently in pepper production
- It has 4 FTE permanent jobs, as well as a part time on-site manager
- Abbey View Produce Limited are packers and suppliers, mainly to J. Sainsbury's supermarket. The business has a turnover of £35 million in 2011 accounts, and markets for 26 growers covering 95 hectares of crops. Crops marketed include tomatoes, cucumbers, peppers and aubergines.
- The site appears to be the only one within Broxbourne to have seen significant investment in improved facilities within the last decade

Planning history

2005 – 7/0805/05/F/GO *Holding reservoir to collect water falling on glasshouses* (Planning permission granted)
2005 – 7/0277/05/F/GO *Erection of new glasshouse to replace derelict glasshouses* (Planning permission granted)
1996 – 7/403/1996 *Erection of glasshouses* (Planning permission granted)



Nursery	Area	Details	Grower	Marketed
In-Ex Garden Centre	1.8 hectares	Part of a garden centre	None	None

- The site is owned by Anthony Thompson
- The site is no longer in commercial production, and is used as a garden centre with a significant element of retail use
- A certificate of lawfulness for the change of use to a garden centre was granted in 2000.
- A retrospective planning application for use of 'The Mall' building for retail sales was withdrawn in 2012.

Planning history

2012 – 07/12/0129/F *Use of 'The Mall' building for retail sales (retrospective), extended parking and revised access* (Application withdrawn, 'The Mall' remains without consent)
2011 – 07/11/0296/F *Change of use of part of car park to a car wash* (Planning permission granted)
2002 – 07/0056/02/F/GO *Erection of glasshouses to create an additional retail area* (Planning permission granted)
2001 – 7/502/2001 *Erection of covered walkways* (Planning permission granted)
2000 – 7/221/2000 *Certificate of lawfulness for change of use of the site to a garden centre* (Planning permission granted)
1994 – 7/430/1994 *Erection of seven glasshouses* (Planning permission granted)
1980 – 7/843/1980 *Erection of glasshouses and improved access* (Planning permission granted)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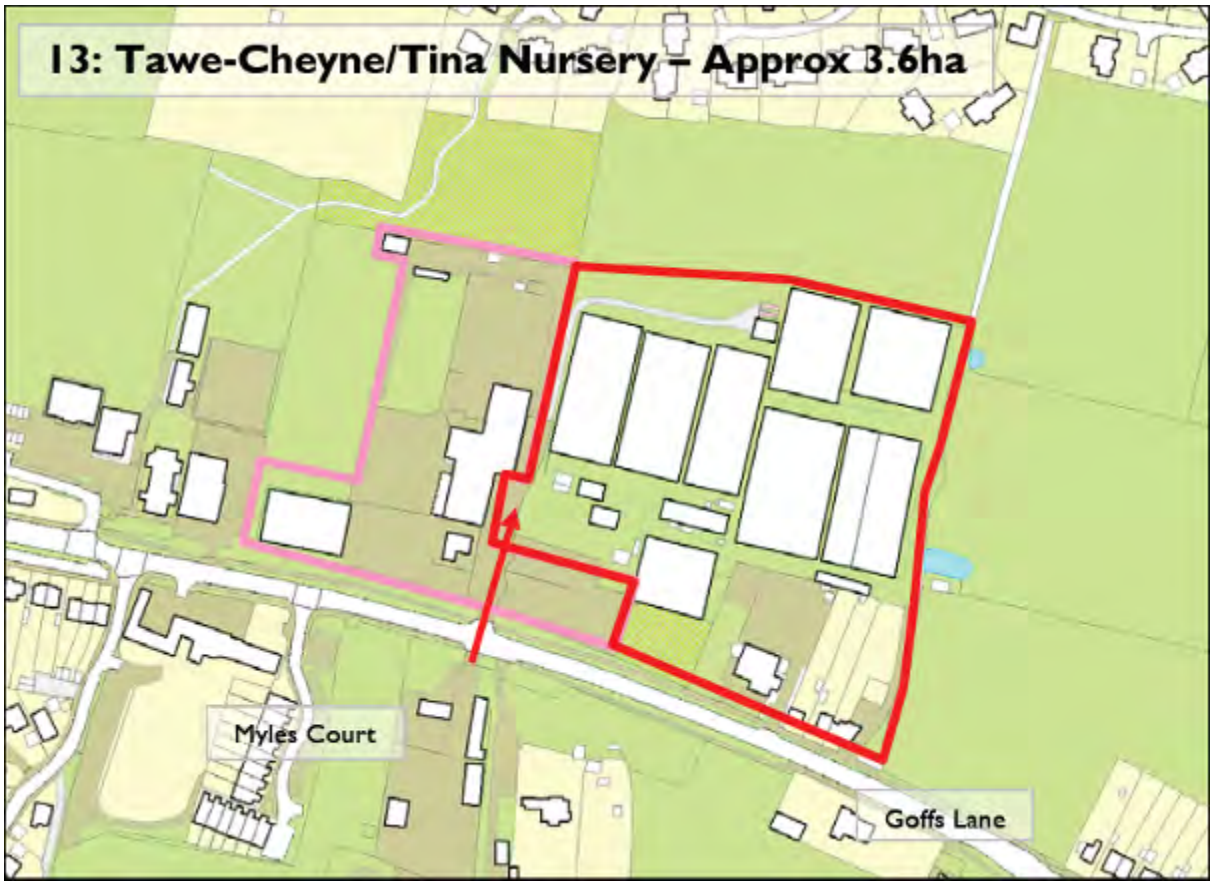


Nursery	Area	Details	Grower	Marketed
Tina Nursery	3.6 hectares	Not in production. Tree and plant centre. Aluminium glasshouses.	Dileto	Dileto

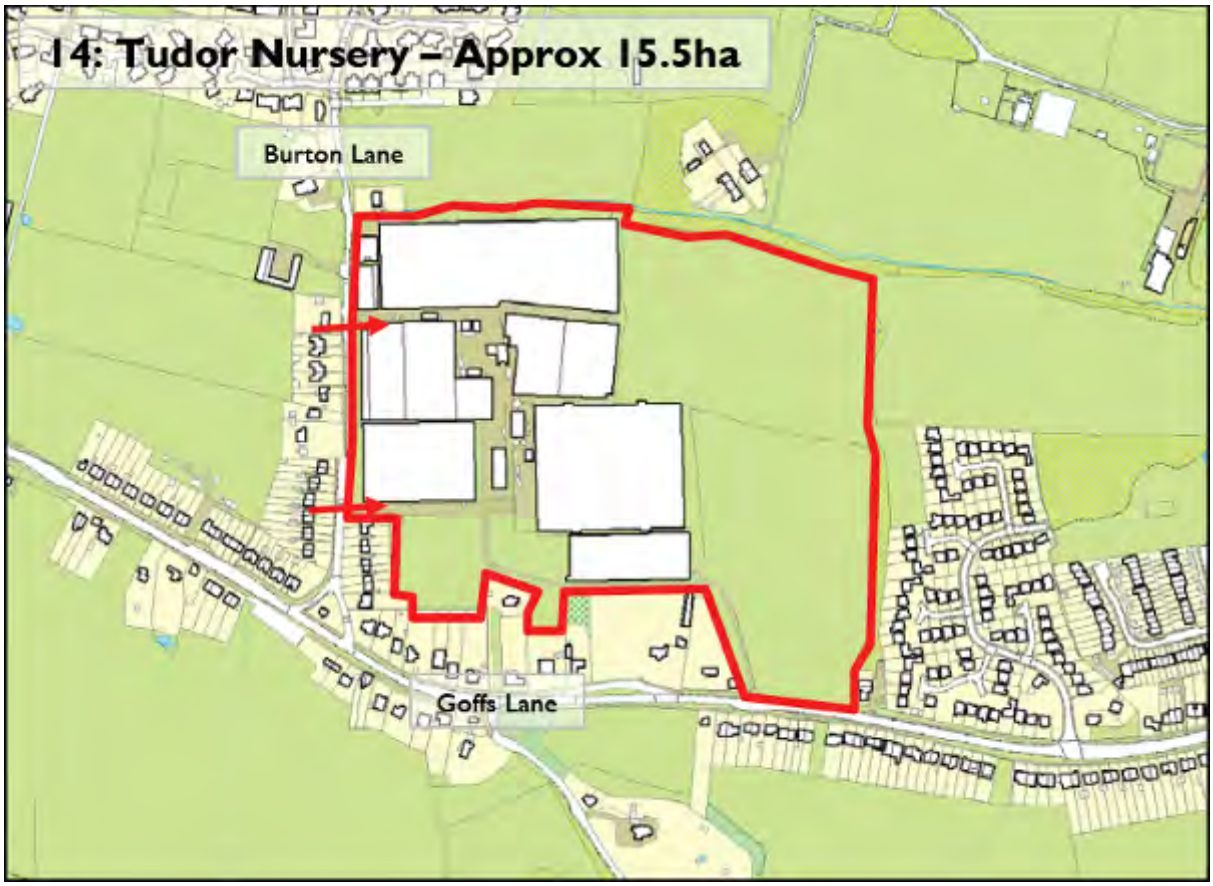
- The site is owned by Peter Dileto – it has been owned by the family since 1973 where they grew salads, predominantly cucumber and tomatoes. 14 people were employed during the peak periods up until 1998 when it became uneconomic to continue trading due to rising costs in particular heating and water.

- The site has since been rented by two different businesses – the first operated for around 10 years supplying flowers to supermarkets before going out of business. A smaller flower business then operated for a further 3 years to 2011, but also ran into financial problems.

- In October 2012 Gap Valley Plant & Tree Centre was established onsite by Peter Dileto. This uses a small amount of the glasshouse space on the site (0.6 ha of the total 1.6 ha of glasshouse at the nursery that is in a usable condition). Some of the timber framed structures are in a particularly delicate condition. The total area of the site is 3.6 ha, with an area of disused land at its north of the holding bordering the St James Village development.

Planning history

2010 – COM/10/0396 *Unauthorised construction works* (Breach of planning control investigated)

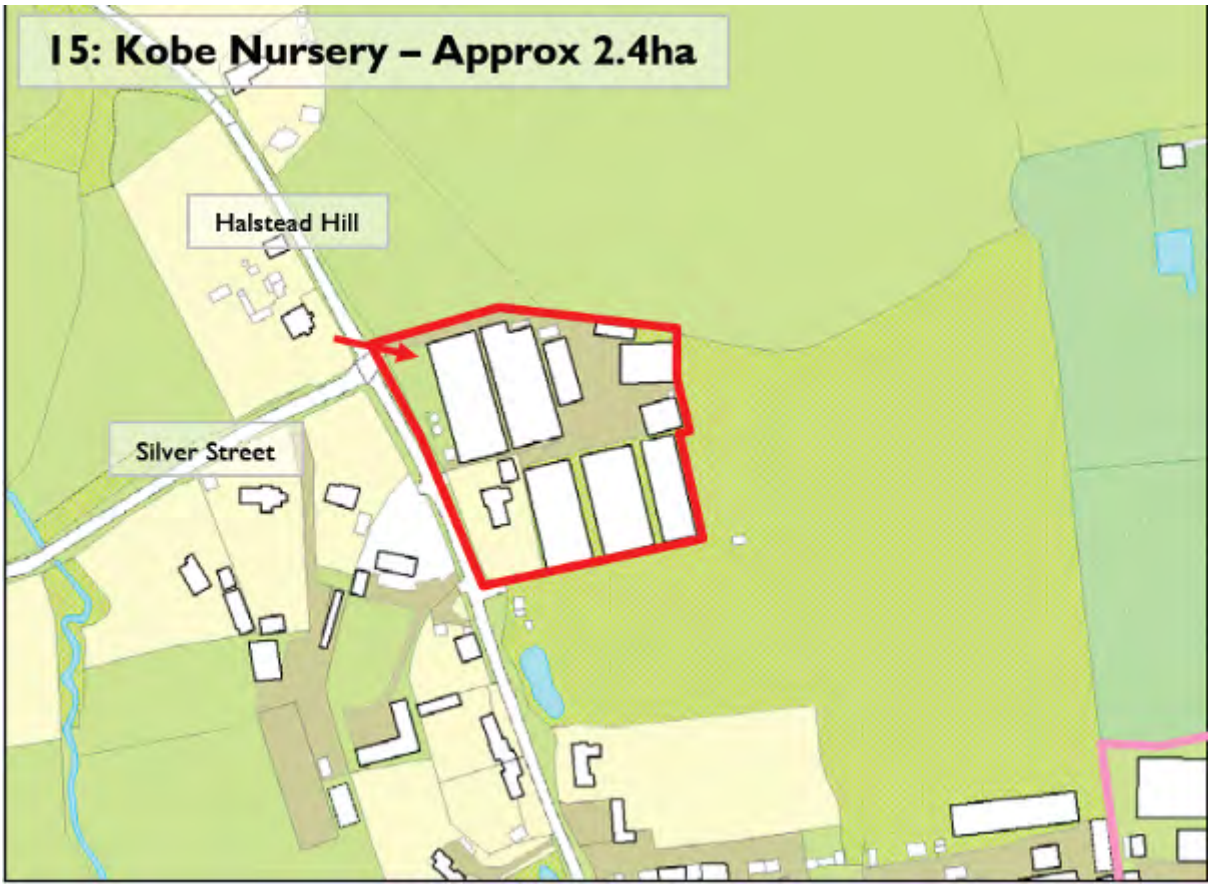


Nursery	Area	Details	Grower	Marketed
Tudor Nursery	15.5 hectares	Timber framed glass (2.4ha) Aluminium glass (3.6 ha). Cucumber production 25 acres of suitable glass area adjacent to site	Cannatella	Abbey View

- The site is owned by Frank Cannatella and family
- The site has 5 FTE permanent jobs, as well as employing up to 12 seasonal workers each year
- It supplies the packer Abbey View Produce Limited with cucumbers, and is ranked as an average supplier in terms of yield and quality.
- Bidwells were commissioned in 2012 by the owners to produce a report on the viability of the glasshouse business within the context of the industry. The report confirms that the business is trading profitably before owners' remuneration (5 family members work in the business). However, Bidwells consider that the business does not have a long term future and that even with investment in new glass the business would not be viable.
- A substantial part of the site is covered with glasshouses; some of the aluminium-framed ones are in production, while the older timber-framed structures have been derelict for some time.

Planning history

2012 – **COM/12/0186** *Untidy land* (Breach of planning control investigated)
1993 – **7/391/1993** *Extension to packing shed* (Planning permission granted)
1991 – **7/853/1991** *Replacement of timber glasshouses with aluminium framed glasshouses* (Planning permission granted)
1981 – **7/054/1981** *Extension to packing shed* (Planning permission granted)
1980 – **7/954/1980** *Extension to boiler house and new chimney* (Planning permission granted)



Nursery	Area	Details	Grower	Marketed
Kobe Nursery	2.4 hectares (0.4 ha in production)	Derelict (2 years) plans to start growing bedding plants Unit rented on site by Cabinet Maker	Deane	None

- The site is owned by Albert Deane
- The glasshouse has been derelict for the past two years, but the owner does have plans to bring it back into production in the future (for bedding plants)
- There have also been several recent planning applications for temporary industrial uses on the site

Planning history

2012 – 07/12/0853/F *Change of use of Unit 2 from agricultural use to commercial storage* (Planning permission granted)
2012 – 07/12/0493/F *Continued use of Unit 1 as a bespoke cabinet maker for a period of 24 months* (Planning permission granted)
2011 – COM/11/0329 *Construction of unauthorised buildings, and use of site for various commercial uses* (Breach of planning control investigated)
2003 – 7/0820/03/F/GO *Erection of a new 5-bed detached dwelling* (Planning permission granted)
1988 – 7/631/1988 *Demolition of existing packing shed and erection of a pre-fabricated packing shed* (Planning permission granted)


Kobe Nursery
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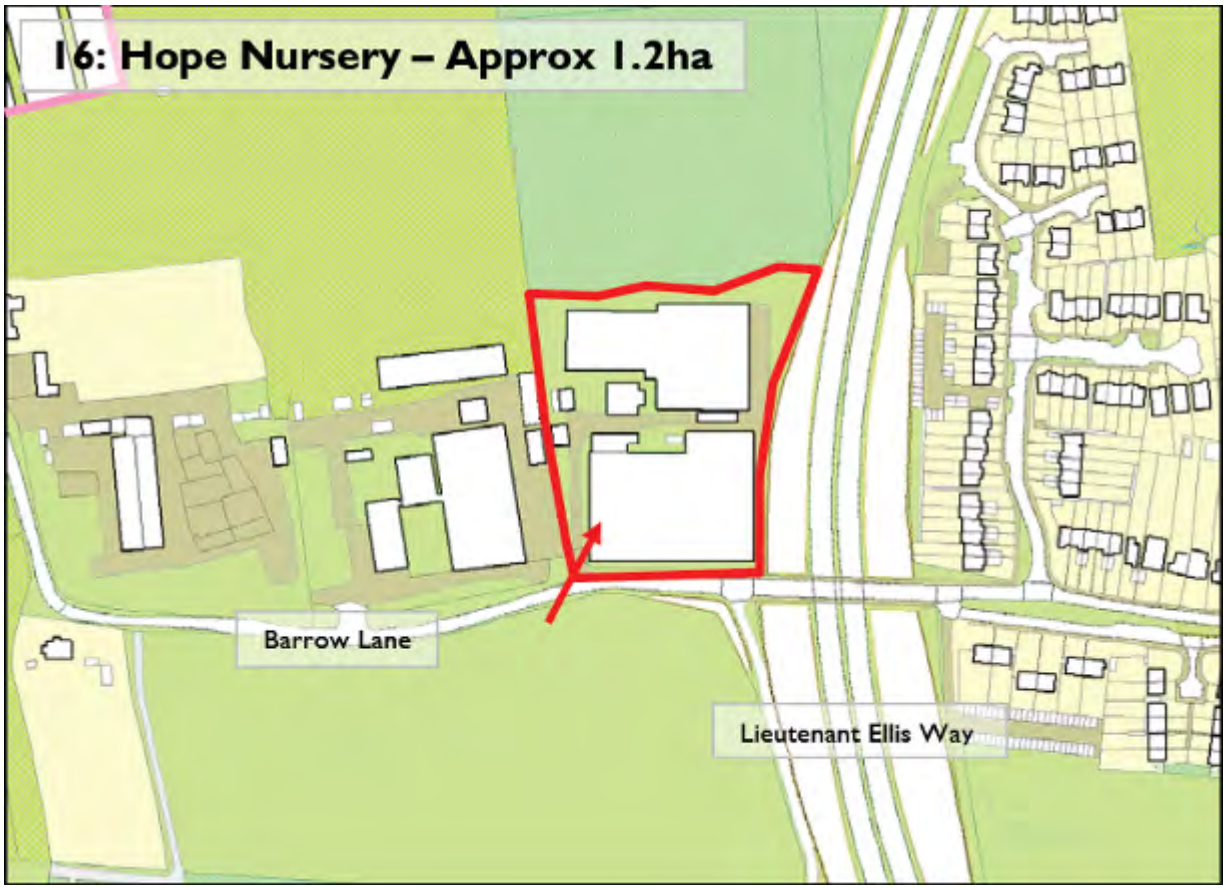

Nursery	Area	Details	Grower	Marketed
Hope Nursery	1.2 hectares (0.4 ha in production)	Carnivorous plants	Euroflora	Euroflora

- There are 0.4 hectares in production with the business specialising in carnivorous plants.
- The accounts for Euroflora Limited show a trend of improving net worth and bank balance, albeit form a low base. The Company had net assets at the end of the 2011 accounts of £11,780.

Planning history

1987 – 7/131/1987 *Erection of two glasshouses and a polytunnels* (Planning permission granted)
1983 – 7/003/1983 *Erection of a glasshouse and an amenity building* (Planning permission granted)


Euroflora
Ltd
Specialists in carnivorous
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(01992) 642
www.euroflora

Nursery	Area	Details	Grower	Marketed
Britannia Nursery	4.1 hectares	Not in production, derelict site	None	None

- Following a major fire, the site is now fully derelict and inaccessible. The site also now appears to be suffering vandalism.

- The site lies within the Lee Valley Regional Park – any development of the site would require consultation with the Park Authority.

Planning History

2001 – 7/61/2001 *Extension to create larger store and a revised entrance* (Planning permission granted)
1999 – 7/699/1999 *Cladding of an area of glasshouses with steel* (Planning permission granted)
1998 – 7/260/1998 *Cladding of an area of glasshouses with steel, and use of part of the site for the trade of cut flowers* (Planning permission granted)
1997 – 7/712/1997 *Certificate of lawfulness for use of part of the site for the trade of cut flowers* (Planning permission granted)


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