

# South Gloucestershire Set for the future







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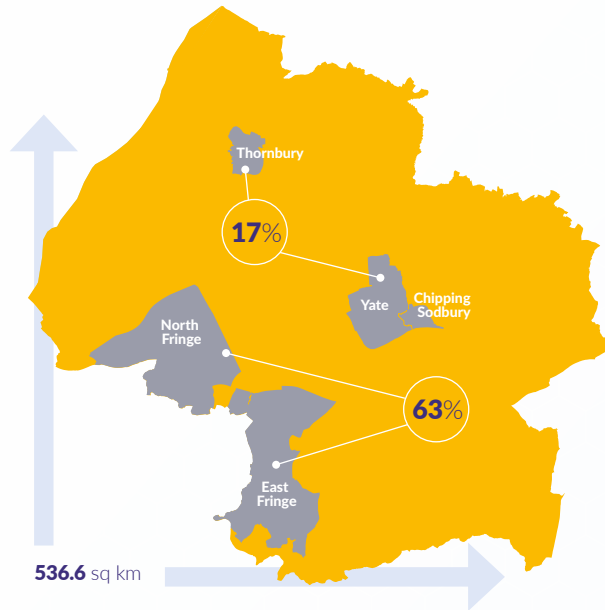
  
**South Gloucestershire**  
Council

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# The Local Landscape



## Our people

Total population: **299,439** in 2023.

Working age (16-64 years):  
**188,511 (63.0%** of total population).

Ethnic minority population:  
**25,568 (8.8%** of total population).

Between June 2022-2023, population increased by **1.4%**.

By 2043, population is expected to increase by **18.3%** from the 2023 estimate.

Sources: ONS, Mid-year population estimates (2023); ONS, Census (2021); ONS, Population projections for local authorities: Table 2 (2020)

**300k**



## Employment

High levels of employment (**82.8%** in September 2024), which is above England's figure of **75.7%**.

The employment opportunities available are in a wide variety of sectors:

Public Administration and Defence is the largest employing sector, with **17,250** employees.



Construction represents the largest number of businesses (**1,960**) and has grown by **4%** on average annually.



Transport & Logistics employs **13,876** people, with employment growth between 2017-2022 of **13%** on average annually.



Health and Social Care employs **15,440** people, with steady employment growth of **4%** annually.



Advanced Manufacturing employs **8,285** people.



Air and Aerospace is by far the most specialised sector with **7** times the concentration of employment compared to Great Britain.



Sources: ONS, Annual Population Survey (2025); ONS, Business Register and Employment Survey (2022); ONS, Business Counts (2022)

## The place

Total administrative area: **536.6 sq km**.

More than half of South Gloucestershire's population (around **63%**) live in the urban and suburban areas to the north and east of Bristol.

A further **17%** call the market towns of Yate, Chipping Sodbury and Thornbury home.

Most of the land area of South Gloucestershire is rural and the remaining population is spread across many smaller towns, villages and communities.

Source: South Gloucestershire Council, South Gloucestershire Local Plan Regulation 19 Consultation Document (2025)

## Wages and living

Median wage for full-time workers is greater than the South West and England (**£39,300** in South Gloucestershire, **£37,600** in England and **£36,100** in South West in 2024).

Source: ONS, Annual Population Survey (2025)

The average house price in South Gloucestershire in December 2024 was **£339,000**. Across England, the average price was **£291,000**.

Source: ONS, HM Land Registry (2024)

## Education and skills

In 2021, **85.8%** of all residents aged 16 years and older had at least one qualification, compared to **81.9%** in England.

**33%** had a level 4 qualification or above, slightly lower than the figure for England, which was **33.9%**.

In the 2023/24 academic year, **2,180** apprenticeships were started.

Intermediate level apprenticeships accounted for **20.2%** of new starts, advanced level apprenticeships accounted for **45.0%** and **34.9%** were higher level. Sources: ONS, Census (2021); Department for Education (2025)



## Our business base and productivity

**16,600** active businesses based in the area in February 2025.

Source: Banksearch (2025)

**1,460** startups launched in 2024.

Source: Banksearch (2025)

**5.4%** of businesses are high growth firms.

Source: Metro Dynamics, Analysis of Data City (2025)

**25%** business growth between 2010 - 2024.

Source: Metro Dynamics, Analysis of Data City (2025)

**54%** increase in medium sized businesses.

Source: Metro Dynamics, Analysis of Data City (2025)

In 2023/24, **62** projects funded through Innovate UK, totalling **£59.2 million**.

Source: Metro Dynamics, Analysis of businesses receiving Innovate UK funding (2025)

In 2022 Gross Value Added\* per hour worked was **£52.20**\*\*



**24th** highest GVA per hour of a local authority in the UK, **2nd** highest in South West.\*\*

Between 2010-2022, GVA per hour worked grew by **44%**\*\*

Digital is a high-growth sector with **15%** annual GVA growth and **57%** faster productivity growth than the GB average. Sources: \*\* and ONS Business Register and Employment Survey (2022)

Quantum Technology has **8** times more businesses in South Gloucestershire compared to the nation. Source: Metro Dynamics, Analysis of Data City (2025)

Autonomy and Robotics businesses are **4** times more concentrated in South Gloucestershire compared to the nation. Source: Metro Dynamics, Analysis of Data City (2025)

\*Gross Value Added (GVA) is the measure of the value of goods and services produced in an economy.

\*\*Source: ONS, Regional gross value added (balanced) by industry: local authorities by ITL1 region (April 2024) (Table 2: Chained volume measures in 2019 money value)



# Aerospace, Advanced Engineering and Space

## Aerospace and advanced engineering

South Gloucestershire has a rich history of innovation in the aerospace industry. It was home to Concorde as the airframe and engines were predominately developed here, as well as the UK assembly line. All UK Concorde made their first flight from the runway in Filton! Today, the last flying Concorde is displayed at the Aerospace Bristol Museum. This legacy has translated into many of the world's top aerospace companies such as Airbus, GKN Aerospace, BAE Systems, Rolls-Royce and Leonardo choosing to be based in South Gloucestershire. As a result, supply chain companies like Bikar Aerospace have been able to grow, along with businesses focusing on pioneering technologies, such as Sora Aviation.



## Wide-ranging applications

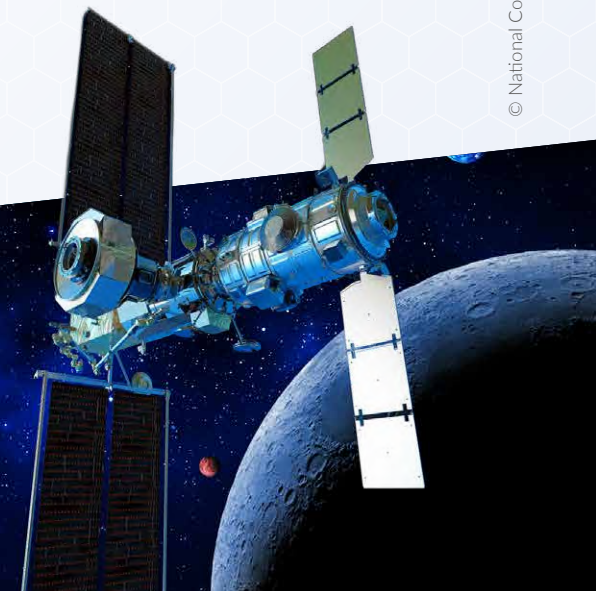
The engineering expertise in South Gloucestershire does not just extend to aerospace. Businesses in the region are also at the forefront of composites, robotics, defence and space.

## Space

Space is a growing industry and generates an income of nearly £18.9 billion every year (*gov.uk, 2025*). South Gloucestershire is home to leading companies such as OHB SE and Bristol Spaceplanes, and is supported by businesses like The Centre for Modelling and Simulation (CFMS), Nova Systems and CGI Group, which work across a range of industries. It is no surprise that the West of England was chosen as one of the UK Space Agency's seven regional space hubs.

## Skilled workforce

South Gloucestershire's skilled workforce is another attractive feature for aerospace, advanced engineering, and space businesses. According to the ONS Census 2021, 33% of residents hold a level 4 qualification or higher, and the talent pool is continuously replenished by 28,000 undergraduates and post-graduates from the West of England's four top universities (*Invest Bristol and Bath, 2025*).







## The future of flight

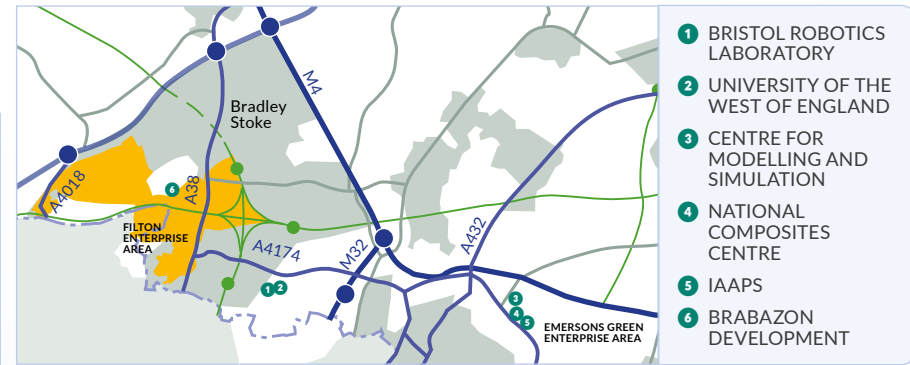
Businesses in South Gloucestershire are leading the way in developing innovative technologies that will shape the future of aerospace. One notable example is Sora Aviation, an aerospace company developing a 30-passenger electric Vertical Take-Off and Landing (eVTOL) aircraft, the S-1, for the Advanced Air Mobility (AAM) market. With its high capacity eVTOL, Sora's vision is to make aerial mobility both affordable and accessible to the general public. Sora's founders Furqan and Malcolm Foster previously served as subject matter experts on AAM at GKN Aerospace. In 2018 they envisioned the concept of an "eVTOL bus" – they have been relentlessly pursuing that vision ever since.



## Pioneering research

World-class research is also taking place at national centres of excellence, including:

- The Institute for Advanced Automotive Propulsion Systems (IAAPS), which is a wholly owned commercial subsidiary of the University of Bath.
- The National Composites Centre, which is part of the Catapult Network that supports businesses in transforming great ideas into valuable products and services.
- The Bristol Robotics Laboratory, a collaborative partnership between the University of the West of England (UWE) and the University of Bristol.
- The Centre for Modelling and Simulation, a not-for-profit organisation specialising in digital engineering.



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## Filton Enterprise Area

The Filton Enterprise Area is the largest aerospace cluster in the UK and is the home of innovative aerospace and aviation technology. It is located in the north fringe of Bristol, alongside the A38 and in close proximity to the M4 and M5 motorway interchange. This location provides direct east-west access to London and Cardiff, as well as north-south access to the Midlands and the South West. The area's centrepiece is the Brabazon development, a £2 billion project for a new mixed-use neighbourhood by YTL Developments. The Brabazon development will feature 6,500 homes, along with student accommodation and options for later-living. It will also include an arena with a capacity of over 17,000. Additionally, there will be more than 3 million square feet of (B1 and B2) commercial space, and higher and further education provisions that will offer city centre quality accommodation in a 'green' environment. A new railway station will connect the area to Bristol Temple Meads in less than 15 minutes.

Find out more about [aerospace and advanced engineering](#) and [space](#) in the West of England

# High Tech, Digital and Life Sciences

South Gloucestershire is known for its innovation in high-tech, digital, and life sciences fields. This sector receives strong support from South Gloucestershire Council and benefits from research undertaken at the four universities in the West of England:

- University of the West of England (UWE)
- University of Bristol
- University of Bath
- Bath Spa University

Companies like Hewlett Packard Enterprise (which is building the new Isambard-AI supercomputer for the University of Bristol), eXmoor Pharma and Oxford Instruments are located here.

## Life sciences

Life sciences are a particular focus in South Gloucestershire, with a growing emphasis on medical and digital health technologies. Companies like Oxford Instruments and eXmoor Pharma are leading the way in their respective industries and have developed purpose-built facilities in the area. Additionally, new pioneering businesses are being set up in places like Future Space, such as EarSwitch and FluoretiQ Limited. Several centres of excellence have been established in the region, such as the Clinical Biotechnology Centre (including the NHS Blood and Transplant Hub), the Health Tech Hub and the Institute of Bio-Sensing Technology, the latter two being based at UWE.

## Emersons Green Enterprise Area

Businesses that move to South Gloucestershire can benefit from world-class facilities within the Emersons Green Enterprise Area (EGEA), including the Bristol and Bath Science Park.

## Bristol and Bath Science Park

The Bristol and Bath Science Park (BBSP), jointly owned by South Gloucestershire Council and the University of Bath, is home to:

- IAAPS, which is developing propulsion systems that are capable of powering future vehicles using clean fuels and is developing a new facility to produce and store green hydrogen.
- the National Composites Centre, which will be hosting the UK's Isambard-AI supercomputer from Summer 2025 and is part of the Digital Engineering Technology & Innovation (DETI) programme.

The BBSP offers existing buildings to support all scales of business. These include drop down space in the main Forum building, 3-12 person serviced offices and larger leased office space available to support technology, science and innovation. In addition, there is development land available with planning permission for appropriate future commercial development. The expertise located at the BBSP makes it the perfect place for science and technology businesses to accelerate their growth. Visit the [BBSP website](#) for more information.







© Future Space



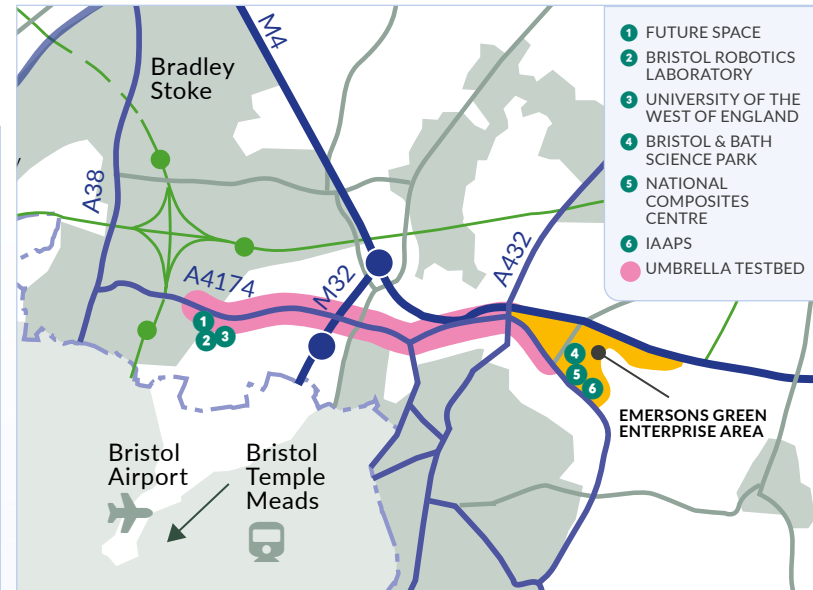
## UMBRELLA - innovation network

South Gloucestershire Council's UMBRELLA network is built in partnership with funding from Toshiba Europe Limited and the West of England Local Enterprise Partnership, administered by the West of England Mayoral Combined Authority. It invests in the research and development capacity in the region.

UMBRELLA is one of the largest and world-leading open programmable Industrial Internet of Things (IIoT) networks connecting testbeds at South Gloucestershire's six innovation hubs below. This unique platform bridges the gap between the physical and laboratory worlds and evolves ideas beyond the boundaries of the lab and closer to the market.

- Bristol and Bath Science Park.
- National Composites Centre.
- IAAPS Advancing Propulsion.
- Bristol Robotics Laboratory.
- Future Space.
- The University of the West of England.

Discover more about the [UMBRELLA innovation network](#).



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## Future Space

UWE has invested in facilities designed specifically for high-tech, science-based entrepreneurs and innovators. [Future Space](#) offers a range of office space, shared and dedicated laboratories, workshops, and coworking facilities on the UWE campus, and is managed by Oxford Innovation Space. It also provides access to leading University research and funding schemes, making it an ideal location for entrepreneurs and growing companies in the science and technology sector.

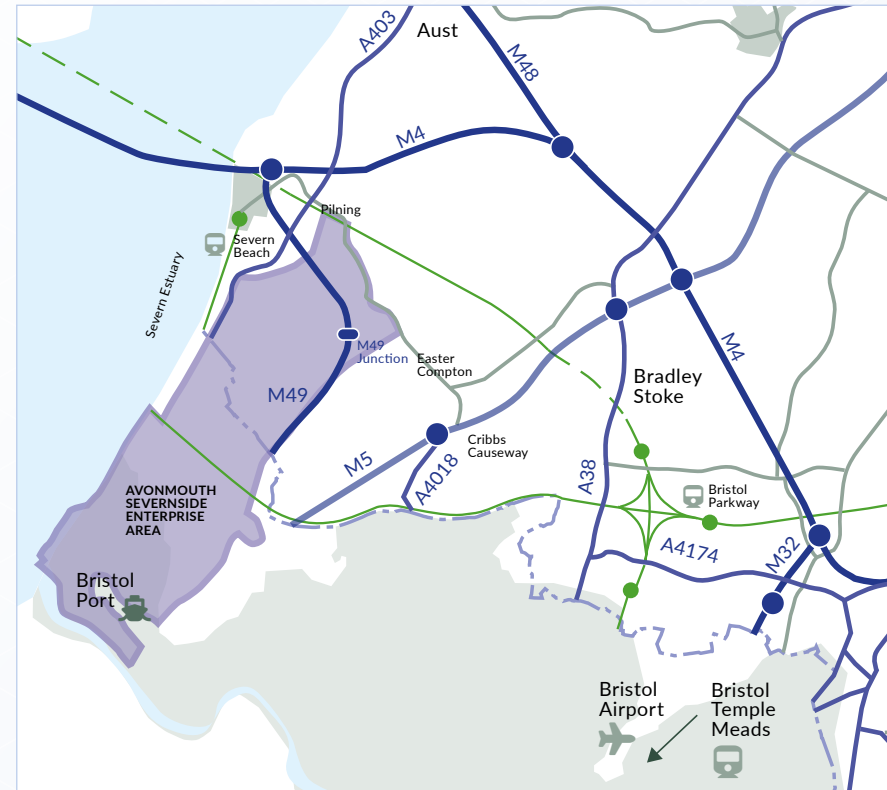
Find out more about [life sciences and digital technology in the West of England](#)

# Logistics and Distribution

The Severnside area in South Gloucestershire is an ideal location for large-scale warehousing and distribution, with excellent transport links by road, rail, sea and air.

## Key facts:

- The area's proximity to the M4/M5 motorways means that 85% of the UK's population live within a 4.5-hour drive.
- A new M49 junction is due to open in 2026, which will further improve access to this area.
- The area is adjacent to Bristol Port, the UK's most centrally located deep-sea port.
- Bristol Airport is just a 30-minute drive away.
- Greater connectivity across the region is being supported by the MetroWest and Mass Transit projects. The early stages of these projects will improve transport services between Bristol Temple Meads train station and Severn Beach.
- Around 300 acres of land can be developed as it benefits from extant planning permission.
- The area's future has been secured by 10.5 miles of flood defences built along the coastline.







## Avonmouth Severnside Enterprise Area

Severnside is part of the Avonmouth Severnside Enterprise Area (ASEA), a globally significant enterprise area covering almost 4,500 acres of land along the River Severn estuary and incorporating Bristol Port. Its accessible location and high-quality facilities appeal to regional, national and international businesses. The three largest employment sectors in Severnside are transport and storage, wholesale, and manufacturing. These reflect the area's attractiveness for large-scale industrial, warehousing, distribution, energy and waste processing uses, in addition to the activities of the port and its storage and distribution facilities and associated industries.



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These are a few of the businesses and business parks that are located in the ASEA:

- Amazon has a 500,000 square feet distribution centre that supplies the area with around 2,000 jobs.
- Warburton, DHL and Lidl also have distribution centres located at [Western Approach Distribution Park](#).
- [Westgate](#) is a 296-acre distribution park where over 2 million square feet of warehousing/distribution accommodation has been developed.

- [Panattoni Park](#) Avonmouth offers 1.3 million square feet of grade-A warehousing.
- [Matrix 49](#) is a 65-acre site which will provide over 1.1 million square feet of industrial/distribution development.

## Severnside Masterplan

The final masterplan sets out a locally informed vision to help shape the future of Severnside in the medium and long term, up to 2050. It builds on all of the different strengths that the area has.

The masterplan takes into account the:

- character of existing coastal villages and rural communities.
- strong economic sector unique to Severnside.
- unique natural environment.
- climate and nature emergency.
- new economic and development opportunities.
- need for sustainable travel solutions.

Find out more about the [Severnside masterplan](#).

Find out more about [logistics and distribution](#) in the West of England



# Our Nuclear Vision

## Nuclear new build is coming to Oldbury-on-Severn

For 44 years, Oldbury Power Station generated enough low-carbon electricity to power the equivalent of nearly 900,000 homes, saving 3.5 million tonnes of carbon. In July 2024, Great British Nuclear (GBN), the Government's arm's length body bought the site immediately to the north of the decommissioning nuclear power station to renew that legacy and develop new civil nuclear power in South Gloucestershire.

The site of around 370 acres is nationally designated for nuclear development (EN-6) with existing assets and grid infrastructure and was acquired along with the Wylfa Newydd site on Anglesey from Horizon Nuclear Power, Hitachi's UK nuclear development company.

GBN's intention is to build a fleet of multiple small modular reactors (SMRs) on the site and is engaged with four prospective SMR suppliers in a technology selection process, which will conclude in Spring 2025.

The acquisition puts Oldbury in the position to join Hinkley Point C and Sizewell C at the forefront of the UK's nuclear renaissance, with a huge part to play in helping the UK achieve its energy security and net-zero goals.

## Severn Edge

Severn Edge is a collaboration of industry, academia, communities, and political leaders, which champions the development of sites around a low-carbon energy hub, fostering innovation in renewable energy, hydrogen and new nuclear technology. It supports the development of sites around two decommissioning nuclear power plants in Oldbury-on-Severn and Berkeley, just over the border in the neighbouring Gloucestershire County local authority.

## A new vision at Berkeley

Chiltern Vital Group (CVG) bought the Gloucester Science and Technology Park at Berkeley in September 2024. This is the site of the former research and development (R&D) facilities associated with the now decommissioned Magnox power station at Berkeley.



Renamed Berkeley Science and Technology Park, CVG's vision is to create a globally recognised Nuclear and Clean Energy education, R&D and business innovation complex that builds upon the site's nuclear heritage and the unique nuclear inspection facilities that have been mothballed for many years. The University of Bristol will be a key enabler of this vision with the adjoining South Gloucestershire and Stroud College.

The scheme for the site is well advanced and will deliver over 600,000 sq. ft. of state-of-the-art facilities designed to meet the specific requirements of education providers and businesses from start-up stage to full maturity. This scheme will be submitted for planning approval in August 2025.





## An exciting opportunity

Severn Edge provides an exciting opportunity to develop a Low Carbon Energy Park. The Oldbury-on-Severn site provides:

**Infrastructure** – transport and national grid connections with nearby cities, airports and major shipping ports.

**Industry** – strong industry expertise in nuclear, renewable and hydrogen energy, alongside aerospace, robotics, construction, and energy efficiency R&D.

**Expertise** – 334,000+ people employed in knowledge-intensive businesses and services locally (55% of employment) and supply chains currently working with Hinkley Point C and other nationally significant energy projects.

**Support** – a history of strong community and policy support for nuclear and renewable energy.



Find out more about [Severn Edge](#)



# Food and Drink

The West Country is renowned for its agriculture and its production of a wide range of produce used throughout the country. Additionally, there are numerous innovative producers in the food and beverage industry who are introducing new products to the market, gaining recognition both nationally and internationally.

## Drinks

An established brand for almost 30 years, [6 O'clock Gin](#) has its roots in South Gloucestershire. It is based in Thornbury, and the gin is distilled using their unique double sphere copper pot. 6 O'clock Gin is widely available in outlets across the country and also exported to Europe, USA, Canada, Southeast Asia and beyond.

[Bath Ales](#) also has its main, state-of-the-art brewhouse in Warmley, which opened in 2018 following a multi-million-pound investment by St Austell Brewery (its parent company).



© 6 O'clock Gin

[Chew Valley Distillery](#), a newcomer to the drinks scene, was established in 2020. Despite its short time in the industry, this family-run business based in Bitton has made a significant impact in the gin world. Since its inception, the distillery has relocated to facilitate its growth and has won several awards, including the World Gin Awards and The Gin Guide Awards.

## Food

Given that parts of South Gloucestershire are agricultural, producing quality food is something we take pride in.

[Marshfield Farm Ice Cream](#) has been in business for over 35 years and now offers more than 30 award-winning flavours of dairy ice cream. Marshfield Farm remains a thriving dairy farm, with over 250 British Friesian cows being the sole source of milk for their ice cream, which is produced on-site. The business has grown significantly, now supplying over 8,000 independent ice cream parlours, cafés, restaurants and farm shops across the country.







## More food

South Gloucestershire is home to award-winning preserves. [Single Variety Co.](#) relocated to Warmley to expand its business. The company is now selling jam to the US and Canada, and has over 500 stockists across the UK.

Another award-winning business in the area is [GingerBeard's Preserves](#). They currently produce around 200,000 units per year by hand in their unit at Station Road Workshops in Kingswood.



© Forge and Fern

## Station Road Workshops

Station Road Workshops (SRW) provides an ideal space for new food or drink businesses, as GingerBeard's Preserves has discovered. Owned by South Gloucestershire Council and managed by [New Work Trust](#), SRW offers workshops and offices, including some suitable for catering companies.

## Tailored support for food and drink businesses

[The West of England Food and Drink Support Initiative](#) provides facilities, support and services to small and start-up food, drink and hospitality businesses. It offers technical and product development advice, food certification support and access to sector-specific events. This is part of a West of England Mayoral Combined Authority initiative to support businesses across the region.

## Hospitality

South Gloucestershire boasts a wide variety of exceptional food and drink products, and as a result, there are numerous outstanding eateries where you can sample them. Some of these include:

- [Thornbury Castle](#) – this beautiful 16<sup>th</sup> century building now houses three AA Rosette dining rooms where you can enjoy its rich history.
- [Hattusa Restaurant at Berwick Lodge](#) – set in beautiful grounds, Berwick Lodge offers a unique, luxury dining experience in its two AA Rosette restaurant.
- [Ronnie's of Thornbury](#) – Chef Patron Ron offers a distinctive fine dining experience, showcasing creativity, knowledge and passion for fabulous food at this double AA Rosette restaurant.
- [Curious Kitchen](#) – a double Rosette award-winning restaurant at the Aztec Hotel and Spa, with a menu inspired by flavours from around the globe.
- [The Forge & Fern](#) – an independent café bar and restaurant in Staple Hill with a focus on using local produce and supporting the community. Sample some gin, honey and herbs produced on-site.

# Investing in Our Communities

South Gloucestershire is a wonderful place to live, and we are committed to maintaining its appeal. We have developed masterplans to address the needs of our communities, including their housing requirements. Additionally, we have invested in our high streets, recognising their significance as vital community spaces where local people shop, socialise, work, access services or simply take a moment to pause and watch the world go by.

## Masterplans

The Council is investing in its future by developing a series of strategic infrastructure-led masterplans that outline a vision for the area's future up to 2050 and beyond. These comprehensive and ambitious place-based documents capture how each area should evolve to support its community, including managing development and encouraging growth. The masterplans are committed to addressing the climate and nature emergency, reducing inequality, creating healthy and resilient communities with good housing and transport to ensure that children thrive.

## Housing

We are collaborating with partner organisations to achieve our vision and ambitions for housing, as outlined in our [housing strategy](#).

Over the past five years, South Gloucestershire Council has been the [highest performing local authority in England for delivering social rented housing](#) (Ministry of Housing, Communities and Local Government, 2024). This showcases our dedication to providing access to quality, affordable homes for all.

## High streets

We are providing a range of support and investment to help improve and regenerate our eight high streets, each with its own unique identity.

In response to the feedback we have received about our high streets, we have:

- distributed £224,000 of funding to support new businesses to open in vacant units.
- supported High Street Partnership Groups, Chambers of Commerce and other local business groups.
- made significant improvements to Kings Chase shopping centre, including new signage, lighting and feature wall cladding. In addition, new seating and planters have been introduced, new kiosks installed and a mural painted on the wall of the shopping centre.
- helped businesses with events and projects designed to attract more visitors.
- improved and refurbished public areas with public art, new planters, seats, signage and public toilet facilities.
- improved pedestrian wayfinding to improve connectivity and encourage exploring the local area.

We continue to work closely with our high street partners to understand what improvements are needed in each location and what events and activities people want to see there.





## Regeneration projects

We have collaborated with the West of England Mayoral Combined Authority (the MCA) and Bristol City Council on a strategic infrastructure-led masterplan for the [North Fringe of Bristol](#).

A masterplan has been completed for [Bristol Parkway Station](#) and its surroundings, funded by the MCA and Local Enterprise Partnership through the Investment Fund, administered by the MCA.

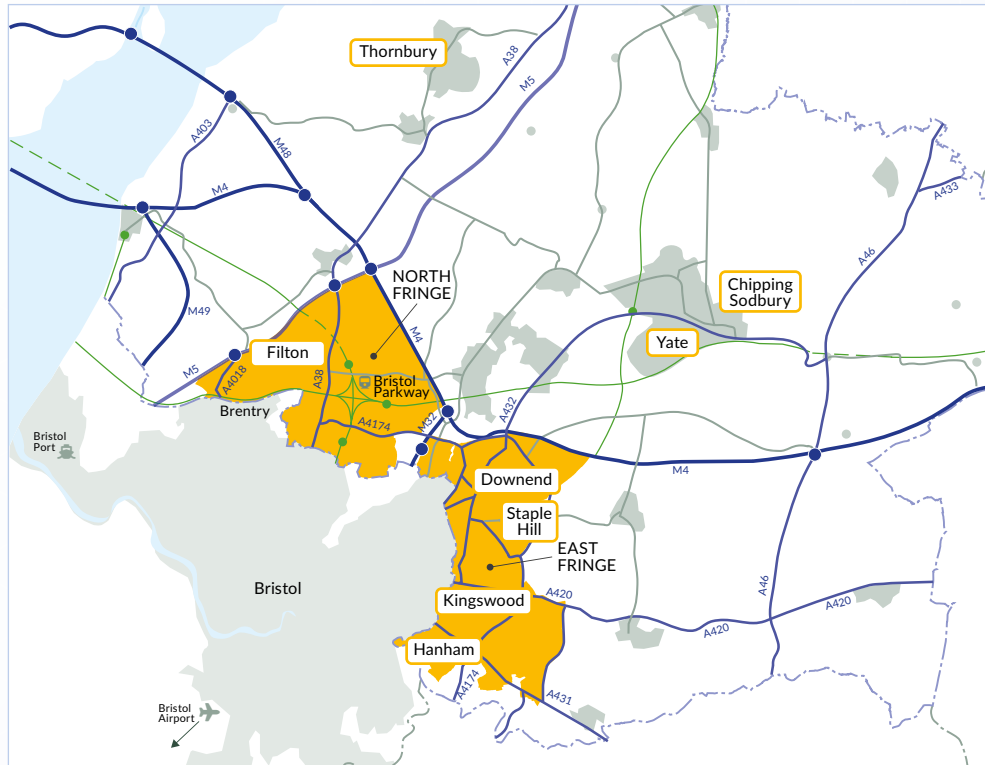
The council is developing a comprehensive plan for the **East Fringe** area, including a vision and strategy for the Ring Road, covering short, medium and long-term proposals.



Over £4.6 million has been invested in **Thornbury Town Centre**, thanks to MCA funding.



A town improvement masterplan has been completed for [Yate](#).



Affordable housing is being developed in various locations across the district – including the creation of homes for social rent and shared ownership in **Brentley**. Alliance Homes and Woodstock Partnerships are collaborating to deliver a scheme of 29 affordable homes. These homes will also be environmentally friendly too, featuring solar panels and air-source heat pumps.



A masterplan has been completed for **Kingswood**, a £25 million commitment to regenerate the town centre and surrounding areas, and preserve its rich history.

**LOVE OUR HIGH STREETS**



Funding from the MCA's Love our High Streets Fund has been used to enhance public spaces in **Hanham**.

Find out more about [shopping local](#) and [masterplanning](#) in South Gloucestershire



# South Gloucestershire Set for the future