

North West Leicestershire – The Need for Employment Land – Update Note

Planning for
North West Leicestershire District Council
July 2024



1 INTRODUCTION

- 1.1 This note provides updated employment land evidence to support development of Local Plan policies and allocations for North West Leicestershire Council. It updates the evidence on the need for employment land set out in the November 2020 Need for Employment Land Report prepared by Stantec, and should be read alongside that report.
- 1.2 This 2024 update is needed primarily to align the employment land evidence with the plan period for the emerging plan 2024-40, whereas the existing evidence covers the 2017-39 period. The update also considers the considerable changes in the employment land development (gains and losses) and planning permissions that has taken place over the seven years since the 2017 base year for the 2020 report. It finally sense checks the findings of the 2020 study to see whether these remain valid in light of the evidence update.
- 1.3 The 2020 report covered the 22 year 2017-39 period, and identified a District-wide employment land need for:
- Industrial (excluding strategic logistics/distribution¹): for 187,000 sq m of net additional floorspace, which would require c 47 ha of land; and
 - Offices: a maximum of 57,000 sq m of floorspace, which based on typical out-of-town plot ratios would require around 9 ha of land.
- 1.4 In updating the assessment of employment land need to 2024-40 for the above mentioned categories we have employed the same overall method to that used in 2020, using the same economic forecasts (as these cover the update period), updated District-wide employment completions and permissions data supplied by the Council and the most up to date VOA floorspace data (to April 2023) and Business Register and Employment Survey (BRES) data (for 2022).
- 1.5 It is also noteworthy that this update report is prepared by Rapleys and not Stantec, the reason being that the team that prepared the original 2020 Stantec report are now at Rapleys having joined in mid-2023. The firms continue to have a good working relationship, and Rapleys have prepared this update report with the full agreement of Stantec, and with full access to the data and analysis used to prepare the 2020 report.
- 1.6 This update note therefore firstly updates the assessment of industrial need (updating chapter 3 of the 2020 work) and then moves on to reconsider the needs of office uses (updating chapter 4) before concluding on the updated requirement figures.

¹ Strategic logistics/distribution are defined as units over 9,000 sq m

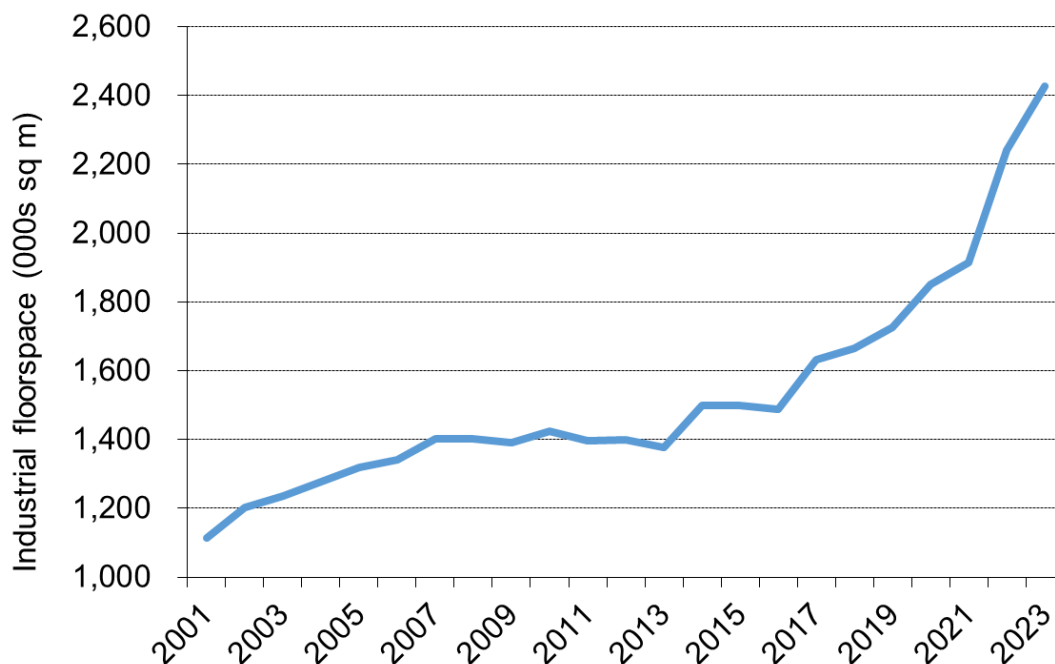
2 INDUSTRIAL NEED

2.1 We first consider industrial floorspace change in the recent past, based on published VOA data. This data is an aggregate of all industrial floorspace - ie including strategic logistics/distribution activities.

Industrial floorspace change

2.2 Figure 2.1 below shows the quantum of industrial floorspace in the District since 2001, and then Figure 2.2 sets this change in comparative context by indexing the change against comparator areas.

Figure 2.1 Industrial floorspace, North West Leicestershire



Source: VOA and Rapleys analysis

2.3 The chart shows steady increase in floorspace up until 2017, since when there has been ‘supercharged’ growth.

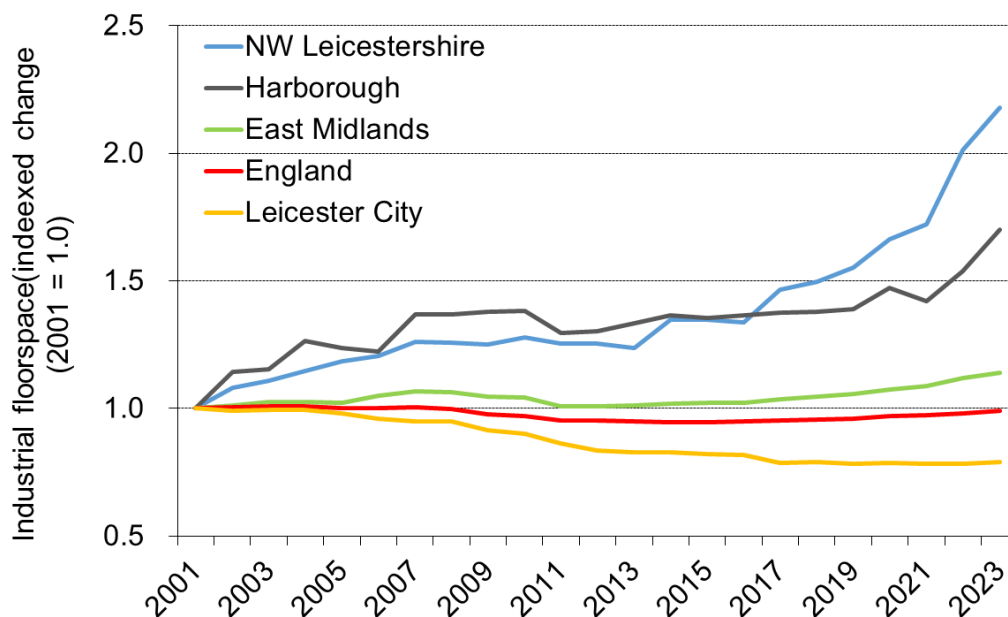
2.4 We do not have a breakdown of the VOA data to interrogate the post 2017 change, but the Council’s plan monitoring economic floorspace completions data (appended) shows²:

- Floorspace change is largely strategic scale warehousing floorspace – 600,000 sq m strategic scale floorspace added since 2017 compared to 90,000 sq m of general industrial (excluding strategic logistics/distribution).
- Net change in industrial (excluding strategic logistics/distribution) floorspace as a proportion of all change since 2017 is 13%, so a larger share than the 5.3% reported in the 2020 evidence.
- Over the last four years much higher development completion activity for both strategic logistics/distribution and industrial (excluding strategic logistics/distribution) compared with the mid-longer term past (five years to the earliest in the data set - twelve years) . The annual average industrial (excluding strategic logistics/distribution) completed floorspace over this short ‘supercharged’ four-year period is 20,000 sq m per annum and the strategic logistics/distribution 106,000 sq m.

² Note of caution with comparing Council monitoring and the VOA data as there can be a lag in the VOA data recording, and thus completion years may not align.

2.5 Figure 2.2 below puts this growth in floorspace into context.

Figure 2.2 Industrial floorspace indexed change



Source: VOA and Rapleys analysis

- 2.6 The chart above compares the NW Leicestershire ‘blue line’ with change in Harborough District and Leicester City (the former being a district that has experienced high industrial growth in recent years, and the City to place the growth in scale of stock in NW Leicestershire in perspective), plus regional and national. The data for the latter two benchmarks needs caveating as change is indexed against total existing stock, and therefore any change has less discernible impact given the scale of the existing stock. In contrast the data for the individual District’s and the City data shows much more ‘movement’.
- 2.7 What is clear is that NW Leicestershire has outperformed even Harborough, which has seen a lot of development in recent years. NW Leicestershire now has 2.4m sq m of industrial floorspace, the same as that for the whole of Leicester City, which has steadily lost space over the past 15 years.
- 2.8 Next, below in Table 3.3 (updated) we consider the change to date in jobs, output and floorspace, comparing with the position in 2020 (which reviewed the 2001-17 period), with the aim to check whether our method remains robust.

Table 3.3 (updated) Industrial floorspace, comparison - jobs and output, North West Leicestershire, 2001-2017/24

		2001	2017	Change 2001- 2017	2024	Change 2001- 2024
Industrial jobs	<i>jobs</i>	20,136	25,746	28%	27,271	35%
Industrial output	<i>£m(CVM) 2016 prices</i>	1,070	1,533	43%	1,678	57%
Industrial floorspace	<i>sq m</i>	1,113,000	1,632,000	47%	2,427,000	118%
Sq m/£m of output	<i>£m(CVM) 2016 prices</i>	1,040	1,064	2%	1,446	39%
Sq m / job	<i>Sq m</i>	55	63	15%	89	61%

Source: Experian (July 2020), Valuation Office Agency latest data, Rapleys analysis

Nb Minor VOA recalibration of 2001 industrial floorspace.

2.9 The table shows:

- Huge growth in floorspace (some 800,000 sq m³) is (most likely) the cause of the floorspace density decrease (penultimate row 1,446 sq m / £m in 2024, compared to 1,064 sq m in 2017, which had changed very little since 2001).
- This analysis suggests it is not sensible to base the 2024 update of industrial floorspace need (excluding strategic logistics/distribution) on 2024 floorspace densities because of the influence of the strategic logistics/distribution.
- It is also quite possible that, in 2024, there is a lag in data where the rapid increase in strategic floorspace has not been reflected in updated estates of GVA resulting in a calculation that mis-represents the market in 2024.
- In summary- in 2017 we could form a view as regards how the industrial (excluding strategic logistics/distribution) market functioned because, in 2017, the NW Leicestershire market was more mixed. But by 2024 the rapid delivery of so much strategic stock has changed the nature to the extent this it is now dominated by larger format stock that is above our size threshold.
- The most appropriate approach is to revert to the 2017 floorspace density to better reflect how ‘normal’ industrial (excluding strategic logistics/distribution) space operates.

2.10 Next, we consider the economic forecaster data – comparing the forecasts from Experian and Oxford Economics (OE). This has to be for total industrial sector output because the forecasters do not distinguish between industrial (excluding strategic logistics/distribution) and strategic logistics/distribution. We make this disaggregation in a follow-on step, but here we first compare total industrial output.

2.11 Following the review of floorspace densities, discussed above, we set aside the latest calculated densities and revert to the original 2017 density factor (1,064 sq m/£m for Experian and 1,177 sq m for OE).

Table 3.4 (updated) Net floorspace change, North West Leicestershire, 2024-40

	Experian		OE	
	Based on 2017 density factor		Bas	
	Total	p.a.	Total	p.a.
All industrial floorspace (sq m)				
a Change in output 2024-40 (£m)	426	27	310	19
b Density factor (sq m per £m output) *	1,064		1,177	
c Occupier demand (floorspace change, sq m GIA) [a*b]	453,600	28,350	364,870	22,804

Source: Experian, OE, Rapleys analysis

2.12 The economic forecast shows:

- Compared with the 2020 report, change in output (row a) – Experian is higher and OE lower (refer to Tab 3.4 in the 2020 report)
- The Experian forecast is now the more positive, and when the density factor is applied this generates an occupier demand for floorspace of c450,000 sq m over the 2024-40 period (row c).

³ Based on VOA annual floorspace data.

- The per annum average floorspace demand figure (28,350 sq m) is only marginally above that recorded in 2020 (27,566 sq m).

The market share for industrial (excluding strategic logistics/distribution) space

- 2.13 In 2020 we calculated a 'low' and a 'main' scenario for industrial (excluding strategic logistics/distribution) space as follows:
- Low scenario – based on Council monitoring data the industrial (excluding strategic logistics/distribution) floorspace accounted for 5.3% (2012/13–2019/20) of all industrial floorspace delivered (ie including all strategic floorspace). Over the longer 2012/13–2023/24 period the industrial (excluding strategic logistics/distribution) share is 9.6%, which compares to an 11.4% share for the period from 2017.
 - Main scenario (the preferred projection) – based on the original VOA data⁴ that considered a much longer term (back to 2001) and with the addition of the last four years from Council monitoring data – the share was 21.6% and is now 19.3%, and we shall adjust our 'main' scenario to 19.3% accordingly.
- 2.14 We next calculate the industrial (excluding strategic logistics/distribution) floorspace demand, and this is summarised in Table 3.6 (updated) over the page, replicating Table 3.6 in the 2020 report. The table sets out economic output forecasts from the two economic forecasters Experian and OE and applies the latest 'low' and 'main' industrial (excluding strategic logistics/distribution) scenario shares of floorspace derived from overall occupier demand.
- 2.15 The occupier demand (rows a-c) is from updated Table 3.4 above, the industrial (excluding strategic logistics/distribution) share of demand (row d) ie 'low' 11.4% and 'main' 19.3% is as per above. These calculate occupier demand and the additional vacancy factor added to occupier demand (rows e and g).
- 2.16 The stock vacancy adjustment (row f) calculation is based on the overall industrial (excluding strategic logistics/distribution) stock in 2024, based on the approach explained above, and uses the same vacancy rate of 1.5% as referred to in the 2020 report, as we anticipate that given the tight market vacancy will have remained at this rate over the past four years. The resultant demand for development in floorspace and land terms is set out at row h.

⁴ We requested and received bespoke data for all industrial disaggregated into industrial (excluding strategic logistics/distribution) and strategic logistics/distribution).

Table 3.6 (updated) industrial (excl strategic logistics/distribution) demand, net floorspace change, NW Leicestershire, 2024-40

	Low scenario				Main scenario			
	Experian		OE		Experian		OE	
	Based on 2017 density factor		Based on 2017 density factor		Based on 2017 density factor		Based on 2017 density factor	
	Total	p.a.	Total	p.a.	Total	p.a.	Total	p.a.
All industrial floorspace (sq m)								
a Change in output 2024-40 (£m)	426	27	310	19	426	27	310	19
b Density factor (sq m per £m output) *	1,064		1,177		1,064		1,177	
c Occupier demand (floorspace change, sq m GIA) [a*b]	453,600	28,350	364,870	22,804	453,600	28,350	364,870	22,804
Industrial (excluding strategic logistics/distribution) - floorspace change (sq m)								
d Industrial (excl strategic logistics/distribution) as a share of all industrial	11.4%		11.4%		19.3%		19.3%	
e Occupier demand (sq m)	51,659		41,554		87,613		70,475	
f Stock vacancy adjustment (sq m)	50,933		50,933		50,933		50,933	
g Vacancy factor (sq m) [8.1% of e]	4,184		3,366		7,097		5,708	
h Demand for development (sq m) [e+f+g]	106,776	6,673	95,852	5,991	145,642	9,103	127,116	7,945
Industrial (excl strategic logistics/distribution) - land area change (ha)	26.7	1.7	24.0	1.5	36.4	2.3	31.8	2.0

Source: Experian and OE data plus Rapleys analysis

b. the density factors – are carried forward from the 2020 study, because it is considered these are more reflective of industrial (excluding strategic logistics/distribution) stock densities.

h. Hectarage based on a plot ratio of 40%

2.18 The table shows:

- a broadly similar profile to that in 2020, but with the industrial (excluding strategic logistics/distribution) quantum now higher under the 'low' scenario because of the higher industrial (excluding strategic logistics/distribution) share of delivery, and also higher on a per annum basis for the Experian scenario under the 'main' longer period (back to 2001). However, under the 'main' scenario, because of the shorter projection period, and also the smaller share for industrial (excluding strategic logistics/distribution) of total industrial demand (19.3% down from 21.6%) the overall demand / land area projection lower.
- The main scenario remains the preferred approach.
- Forecast demand for industrial (excluding strategic logistics/distribution) floorspace (Experian forecast – 'main' scenario) is now running at c9,000 sq m per annum (was 8,500 sq m pa)
- This rate of per annum demand for industrial (excluding strategic logistics/distribution) broadly aligns with the net delivery since 2012/13 (7,300 sq m pa), and is half the rate of delivery over the 'super charged' past four years (19,600 sq m pa) as set out in the Council's monitoring data (appended).

2.19 Whereas:

- the 2020 study identified industrial (excluding strategic logistics/distribution) demand over the 22 year 2017-39 period for c187,000 sq m of net additional floorspace that at a 40% plot ratio would require c47 ha of land,

2.20 This update finds:

- the need assessment identifies a demand figure for the 16 year 2024-40 period (as shown in the last two rows of Table 3.6 updated) for **c146,000 sq m of industrial (excluding strategic logistics/distribution) floorspace that at 40% requires c36.5 ha of land.**

3 OFFICE NEED

3.1 In this section we update the office need following a similar approach and method to that employed for industrial need, and indeed similar to the approach used in the 2020 study. The method does differ in some important respects that we explain later in the section.

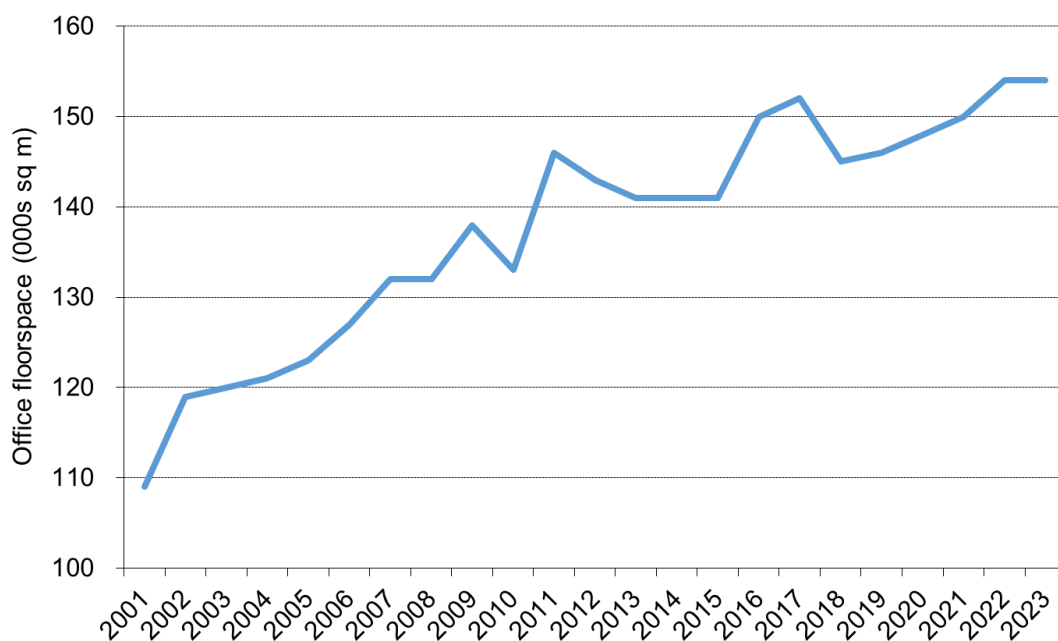
3.2 In 2020 we recommended:

- need over the 2017-39 period for a maximum 57,000 sq m (equivalent to 2,600 sq m per annum) of floorspace (requiring the equivalent of 9 ha of land at a typical 60% out-of-town plot ratio).

3.3 In 2020 the recommended need figure was identified on the basis of an Experian jobs-based economic forecast⁵, which was more positive than the OE forecast

3.4 First, we review changes in total stock as shown in the chart below.

New Figure 3.1 office floorspace, NW Leicestershire



Source: VOA and Rapleys analysis

3.5 The chart shows:

- From a modest floorspace stock of c110,000 sq m in 2001, the quantum has risen steadily.
- Floorspace rose relatively sharply to 2016/17, then fell back, but over the past four years has increased by 8,000 sq m to a new high of 154,000 sq m.
- The change over the recent past (last four years) as reported by the VOA, is broadly in line with the 2,600 sq m per annum forecast in the 2020 study. This is higher than the c1,500 sq m per annum change in floorspace identified in the Council’s monitoring data (see appended table), and are likely to be down to definitional or coding differences. These are relatively modest numbers and the differences marginal, with the direction of travel clear.

⁵ Economic forecasts focus on two metrics Gross Value Added (GVA) and jobs. Both are measured across economic sectors. In forecasting land use change we look at both GVA and jobs as potential indicators of future change. We look to see whether GVA or jobs show the best alignment with past floorspace change. In the case of this Update for industrial GVA best aligned, and for offices jobs proved best.

- 3.6 Whilst the recent increase is comparatively modest, it is relevant to note that an increase of any scale in stock over this period is unusual, with most other areas experiencing shrinking office floorspace stock.
- 3.7 Next, we consider the number of office jobs, and then the product of job numbers and floorspace data allows us to determine job density ratios – ie how much space each job requires. This data is then used to calculate future office demand.
- 3.8 In the 2020 report the economic data (the Experian forecast) showed that in 2017 there were 14,273 office-based jobs, and on the basis of there being 152,000 sq m of office floorspace at that time this generated a locally derived⁶ floorspace density of 10.7 sq m / job).
- 3.9 This update uses the original economic forecasts (Experian and OE), but the base year is now 2024, and it uses the latest VOA office floorspace total for the District (154,000 sq m). We make separate calculations for the current office floorspace density for the Experian and OE job forecasts.
- 3.10 The Experian forecast identifies 15,984 office jobs in 2024, and OE a little higher at 16,864, which against an office floorspace total of 154,000 sq m produces floorspace densities of 9.6 and 9.1 sq m per job respectively. So, closely aligned and both a little higher compared to the 10.7 sq m recorded in 2017. A floorspace density of <10 sq m per job is generally indicative of stock being well used.
- 3.11 Before we update the assessment, we briefly consider the impact of Covid on future office requirements. The 2020 report was prepared during the Covid epidemic, and now there is general agreement that post-Covid the increase in homeworking and the decrease in demand for built office space is here to stay. While in the short to medium term the office market generally has an over-supply, in the longer-term linked to ‘people servicing’ office-based activities associated with an increasing population, we are likely to see some demand return.
- 3.12 The table below identifies the updated demand for office space, and reports and compares both the Experian and OE forecast of job change between base year 2024 and plan end date 2040. Row a identifies job change over the new plan period, row b applies the updated current job density factor, with the occupier demand (row c) the multiple of rows a and b.
- 3.13 Due to the general weakness in the office market with very few if any schemes or sites being promoted, we have made a change to our assessment approach - we no longer make allowances for either a vacancy factor on top of the occupier demand (row d), nor an adjustment to correct for low vacancy/availability rates in the existing stock (row e). This is because both our quantitative and qualitative analysis indicates the occupier demand is already a maximum need, and there is no justification to raise this further. We return at the end of this section to discuss what the plan should set as a minimum.
- 3.14 The demand for development as shown in row f is the same as the occupier demand (row c).

⁶ The HCA produced nationally derived floorspace density figures in the 2015 Employment Density Guide, which for general office space was 12 sq m / job.

Table 3.8 (updated) Office demand, net job and floorspace change, North West Leicestershire, 2024-40

	Experian		OE	
	Total	p.a.	Total	p.a.
a Jobs change 2024-40	3,130	196	3,784	237
b Density factor (sq m NIA /job)	9.6		9.1	
c Occupier demand (floorspace change, sq m NIA)	30,154	1,885	34,434	2,152
d Vacancy factor (sq m)	0	0	0	0
e Stock vacancy adjustment (sq m)	0	0	0	0
f Demand for development (sq m)	30,154	1,885	34,434	2,152

Source: Experian, OE and Rapleys' analysis.

3.15 The economic data presented in the table above shows:

- The OE forecast is now the more positive (row a), with 237 additional office jobs forecast per annum, summing to 3,784 over the whole period. This is around 10% higher than the Experian forecast in the 2020 study that identified 210 jobs per annum, and is now around 20% higher than the updated Experian forecast. While recognising that the difference between the forecasts is relatively modest, in accordance with NPPF guidance to plan positively, in this update we recommend planning on the basis of the higher OE forecast figure.
- On a per annum basis the OE economic forecast generates a demand for development of c2,200 sq m (row f), a little lower than the 2,600 sq m identified in 2020, with the difference largely explained by the exclusion of the vacancy adjustments.
- The OE job change forecast generates a demand over the 16 year plan period for **c35,000 sq m of office floorspace**. This amount of floorspace is equivalent to approximately one-fifth of the District's current office total. This sounds a significant proportion, but is not unusual and needs to be placed in the context of a relatively small office market, and that the office-based jobs growth is largely reflective of a growing population (professional and other jobs required to service a growing population) and also that the current office density is fairly high at 9.1 sq m/job; this may encourage the development market, but a return to some office development remains unlikely in the short-term (next five years).

3.16 We have checked this 35,000 sq m (2,200 sq m pa) against recent delivery (past trends in completions). Many other areas have struggled to deliver any office space in recent years – partly due to Permitted Development Rights that have led to widespread shrinkage of office floorspace and obviously the impact of Covid on working patterns that has reduced the need for office floorspace. But here, as evidenced by the Council plan monitoring/VOA data discussed above, we have been delivering around 2,000 sq m per annum including over and since the Covid pandemic. So, in this context 35,000 sq m seems a reasonable target.

3.17 In the 2020 report we described the District's office need as a maximum – because it was at the limit of what we could positively and reasonably calculate. This remains the case today given the huge uncertainties post-Covid and especially regarding home working. However,

in terms of plan targets it is common to express these as a minimum – because the need assessment should not be used to cap sustainable development.

- 3.18 For the District we note that supply extends to c53,000 with the main sites at Castle Donington and Money Hill, but these sites have not progressed (for offices) to date. However, this is not surprising given they are long-term local plan allocations and expected to provide plan period supply, with flexibility to adjust for unforeseen needs.
- 3.19 However, recognising the strength of the industrial versus office market it may be pragmatic to consider the extent to which any surplus could be re-used as additional industrial supply. It will also be necessary to reconsider the scale of the opportunity on allocated and candidate sites in the context of the latest information on site constraints.
- 3.20 Thus, in conclusion on office need we identify over the Plan period an **office demand of c35,000 sq m that in new land terms would require c2 ha⁷**. Supply may slightly exceed this at the moment but, given sites can/should be allocated flexibly, seemingly surplus out of town office provision could be re-used/re-purposed for other employment uses.

⁷ We no longer recommend planning for office need to be delivered at out-of-town plot ratios, and higher town centre ratios should be applied with in our view 200% a reasonable ratio to apply.

4 CONCLUSIONS

- 4.1 This update has aligned the District’s employment land evidence to the 2024-40 period, and considered the form and scale of employment development in the period since 2017.
- 4.2 Overall, we find that the conclusions and recommendations of the 2020 report remain soundly based, and this 2024 report applies broadly the same method to update the floorspace/land needed to support the economic growth policies in the Council’s emerging Local Plan in respect of industrial (excluding strategic logistics/distribution) and office uses.
- 4.3 The updated employment land need assessment identifies requirements for:
- **c146,000 sq m of industrial (excluding strategic logistics/distribution) floorspace that at a 40% plot ratio requires c36.5 ha of land.** Over the 16 year plan period this averages to a requirement for c9,000 sq m per annum, similar to the 8,500 sq m pa identified in 2020 report.
 - **c35,000 sq m of office floorspace that in new land terms would require c2 ha.** This equates to a per annum average need for 2,200 sq m, which is similar to the 2,600 sq m pa average identified in the 2020 report.

APPENDIX

Table 3.7 (updated and expanded) Completions, industrial (excluding strategic logistics/distribution) space, North West Leicestershire, 2012/13–2023/24

	Industrial (excluding strategic logistics/distribution)			Strategic logistics/distribution			Total industrial
	Gross gains	Gross losses	Net change	Gross gains	Gross losses	Net change	Net change
	sq m	sq m	sq m	sq m	sq m	sq m	sq m
2012/13	0	3,082	-3,082	84,000	0	84,000	80,918
2013/14	2,178	0	2,178	0	0	0	2,178
2014/15	1,667	9,205	-7,538	0	0	0	-7,538
2015/16	1,639	0	1,639	12,077	0	12,077	13,716
2016/17	9,505	880	8,625	320,869	0	320,869	329,494
2017/18	4,273	0	4,273	21,936	0	21,936	26,209
2018/19	718	0	718	0	0	0	718
2019/20	5,076	0	5,076	154,222	0	154,222	159,298
2020/21	18,913	26,109	-7,196	19,771	0	19,771	12,575
2021/22	41,797	0	41,797	33,598	0	33,598	75,395
2022/23	40,800	3,045	37,755	371,477	0	371,477	409,232
2023/24	6,356	144	6,212	0	0	0	6,212
Total	132,922	42,465	90,457	1,017,950	0	1,017,950	1,108,407
Average p.a. 2012/13-2019/20	3,132	1,646	1,486	74,138	0	74,138	75,624
Average p.a. 2012/13-2023/24	11,077	3,539	7,538	84,829	0	84,829	92,367
Average p.a. 2020/21-2023/24	26,967	7,325	19,642	106,212	0	106,212	125,854

Source: NW Leicestershire Plan monitoring and Rapleys' analysis.

Table 3.9 (updated) Office completions, North West Leicestershire, 2012/13–2023/24

	Gross gains	Gross losses	Net change
	sq m	sq m	sq m
2012/13	0	0	0
2013/14	1,669	0	1,669
2014/15	0	0	0
2015/16	1,361	0	1,361
2016/17	1,930	0	1,930
2017/18	5,494	0	5,494
2018/19	3,527	0	3,527
2019/20	1,186	220	966
2020/21	3,284	25	3,259
2021/22	1,293	1,701	-408
2022/23	382	245	137
2023/24	967	70	897
Total	21,093	2,261	18,832
Average p.a. 2012/13-2019/20	1,896	28	1,868
Average p.a. 2012/13-2023/24	1,758	188	1,569
Average p.a. 2020/21-2023/24	1,482	510	971

Source: NW Leicestershire Plan monitoring and Rapleys' analysis.



For further details contact:

Andrew Lynch

07876 871708

Andrew.Lynch@rapleys.com

66 St James's Street St James's

London SW1A 1NE

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Registration No: OC308311. Registered Office at Unit 3a, The Incubator, The Boulevard,
Enterprise Campus, Alconbury Weald, Huntingdon, PE28 4XA. Regulated by RICS.

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0370 777 6292

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