



Totnes Neighbourhood Plan

# Industrial Estate Survey

September 2016

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## Executive Summary

A survey of the industrial estate was undertaken by the Totnes Neighbourhood Plan's economy task group as a part of a review of businesses within the town. This included both desk based research and a survey of businesses on the industrial estate. The survey was carried out in June and July 2016. In total 81 businesses were identified and offered the opportunity to participate, with a total of 42 businesses responding (52% response rate). The responses were distributed across the estate and were from a range of sectors and business sizes.

## Key Findings

The Estate industries cover a surprisingly wide range of businesses, from those we expect to find on traditional industrial estates to high tech and emerging markets more linked with Science Parks. This is a factor that Totnes can use in marketing both its reputation for innovation and cutting edge ideas and the local opportunities for these types of businesses. Over 15% of estate businesses are linked to the Green Economy. Though not directly comparable, the European Environmental Goods and Services Sector is estimated to be 2.1% of gross added value share of GDP in 2013.

Family, sole traders and local businesses make up almost 70% of businesses. This local connection and commitment is an important feature in the Estates overall contribution to the economic health of Totnes. Whilst some businesses are very new, the average longevity of all businesses is 28 years demonstrating a huge commitment to the town. This is also demonstrated by the opportunities offered to young people. Initial estimates suggest the estate contributes approx. 25% of jobs in the town, although this could be more as it excludes subcontractors. The survey shows some improvements can be made particularly traffic access at peak commuter hours and signage on the estate however the majority of businesses were satisfied with location and premises.

- **Industry Type:** There are a mix of industries on the estate, with six types being identified; Construction, Garages, Manufacturing, Retail, Service and Wholesale. The most common was services (32%) followed by manufacturing (18%).
- **Business Type:** Local businesses account for 41.5% of those on the estate, followed by family businesses (20.3%). There is also International (1.1%) National (9.1%), Regional (1.1%) and Sole Traders (6.7%) on the estate.
- **Markets:** 54.3% of businesses have a local market base, which ranges from very local (e.g. small garages) to a wider South Devon coverage. 17.3% have a national market, 13.6% regional and 12.3 international.
- **Business Longevity:** Notwithstanding the high level of family businesses, 42% have been in business for over ten years compared with 60% in the DBIS report. This may reflect the growth in the green economy?
- **Public Access:** 54% of businesses on the estate have some form of public access, such as a shop front or reception area. Wholesale was the only industry type in which no business had public access.
- **Employees:** 227 people were employed by the 42 businesses surveyed (excluding sub-contractors and volunteers). This suggests as many as 4-500 people could work on the estate overall. Department for Business Innovation & Skills 2014 survey of SME employers show average subcontractors of 2.83 per SME business, This could mean a further 200 jobs generated by the Industrial Estate with an estimate of third of employment in the town.

- **Time on the Estate:** The average length of time on the estate was 11.1 years. 57% of businesses have been in their premises for 10 years or under, while for 11+ years it was 33%. 10% did not know.
- **Premises Suitability:** 84% of businesses surveyed thought their premises were fit for purpose. 7% said they were not and the rest being unsure.
- **Industrial Estate Suitability:** 79% of businesses surveyed thought the industrial estate was their ideal business location, but only 48% of businesses were certain they were not willing to move from their current premises.
- **Shop Fronts:** 43% of businesses have a shop front and 66% of these are on the estate. Other locations for shop fronts include elsewhere and online.
- **Improvements:** Parking and presentation/signage were the two main areas identified for improvement, receiving 16 and 12 comments respectively. Other improvements suggested included facilities, traffic and flood prevention (due to issues with insurance cover).
- **Engaging Young People:** 43% of businesses surveyed offer work experience to young people, while 29% offer apprenticeships. The most common reason cited for not doing so was health and safety, insurance and associated paperwork.

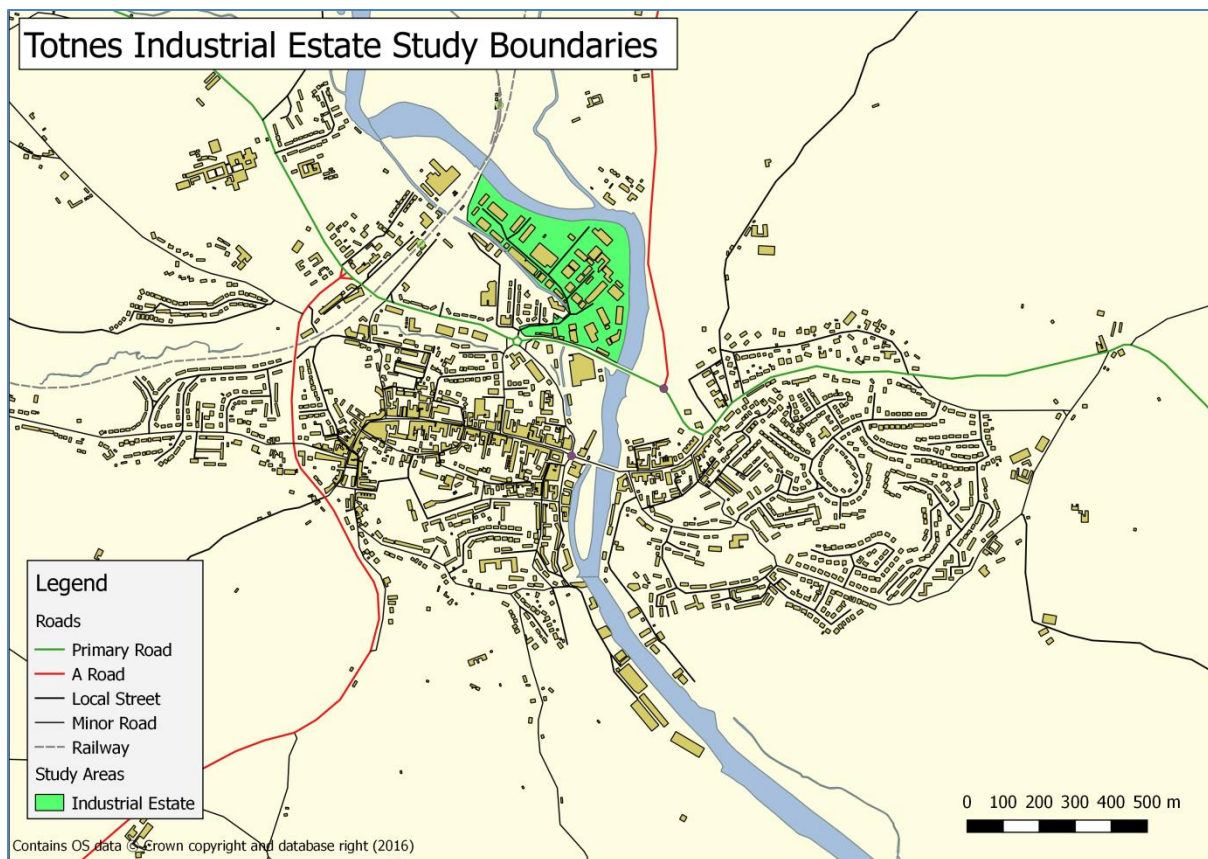
## Industrial Estate Findings Report

### 1. Introduction

A survey of the industrial estate (Figure 1) was undertaken across June and July 2016 by members of the Neighbourhood Plan Team. This included some initial desk-based research before conducting a questionnaire survey across the estate, which was completed by visiting businesses in person and following up via email to ensure as many businesses' views were represented as possible.

The survey collected data on the types of industry on the estate, employment and work experience opportunities as well as asking for opinions on how to improve the industrial estate. 81 businesses were identified on the estate and invited to take part with 42 businesses responding along with one Landlord (52% response rate), although not all respondents completed the survey in full. The businesses that were surveyed broadly represented the mix of industry on the estate (Figure 3). A copy of the questionnaire is included in Appendix A.

Figure 1: Totnes Industrial Estate study location



### 2. A Background to the Estate

Prior to being used for industry, the site of the industrial estate was used as a race course during the Edwardian era. Images within the Totnes Image Bank show the first permanent grand stand which was completed in 1907 (VAR04 0100), and how races were held after the harvest on the Wednesday and Thursday in the first week of September (VAR04 0099). Following this the site was taken over by the Americans during the Second World War (PB0001).

### 3. Business Findings

#### 3.1 Business Demographics

The information which follows compares desktop research on all the businesses and data from those companies who responded to the survey.

##### 3.1.1 Business Types by Sector

The research collated information on the type, size and level of establishment of the businesses on the estate. It was found that the most common business type was services (32%) followed by manufacturing (18%) (Figure 2; Figure 3).

41.2% of the businesses are local businesses, 20.3% family businesses, 9.1% national, 6.7% sole traders, 1.1% regional and 1.1% international. 3 businesses (3.4%) could not be classified. With the exception of national businesses which were underrepresented, most business types were fairly well represented in the survey (Figure 4).

##### 3.1.2 Markets

Businesses with local markets were the most prominent on the estate, representing 54.3%. This was followed by National (17.3%), Regional (13.6%) and International (12.3%) markets. All market types except those with national markets were well represented in the survey. (Figure 5)

##### 3.1.3 Business Establishment

The length of time the businesses surveyed have been on the estate showed considerable variation, with an average of 11.1 years. The shortest was a matter of weeks, while one established business had been in the same premises for over thirty years (Figure 7). 57% of businesses surveyed had been in their premises for 10 years or less, while 33% had been in them for 11 years or more (10% did not know). Desk based research<sup>[1]</sup> showed that the age of businesses since establishment ranged from less than 1 to 500 years in the case of Royal Mail (Figure 7). The average was 36 years (28 excluding Royal Mail), although it should be noted that in the case of non-local businesses the date established may have been a lot earlier than the businesses' arrival in Totnes). The SME report<sup>2</sup> shows 21% of businesses are 11-20 years old, while 39% are over 21.

##### 3.1.4 Public Access to Businesses

Arts & Leisure and Garages were the business types most accessible to the public, with 100% having some form of public access. This was followed by Retail (73%), Construction (67%), Service (35%), Manufacturing (33%) and Wholesale (0%). (Figure 6)

##### 3.1.5 Employees

The number of employees also varied greatly, with 7 sole traders surveyed and the largest employer participating employing 21 people (Figure 8). Between the 42 businesses surveyed, 227 people were employed, which did not include any sub-contractors or volunteers. It could therefore be suggested that as many as 4-500 people may in fact work on the estate if other 48% of businesses have a similar distribution of employee numbers. There is no significant correlation between the length of time a business has been on the estate and the number of employees it has ( $R^2=0.0009$ ).

Figure 2: The distribution of sectors within Totnes Industrial Estate

## Totnes Industrial Estate- Business Types

This map shows the classification of businesses by industry sector. These classifications have been made by members of the Totnes Neighbourhood Plan team using desk based research. They do not reflect the businesses which responded to the survey as a part of this project.



### Legend

Industry Type	Other
Art and Leisure	Non-Estate Buildings
Construction	River Dart
Garage	Woodland
Manufacturing	
Retail	
Service	
Vacant	
Wholesale	
Unknown	

50 0 50 100 150 200 m

Contains OS data © Crown copyright and database right (2016)

Figure 3: Businesses present on the estate, grouped by sector.

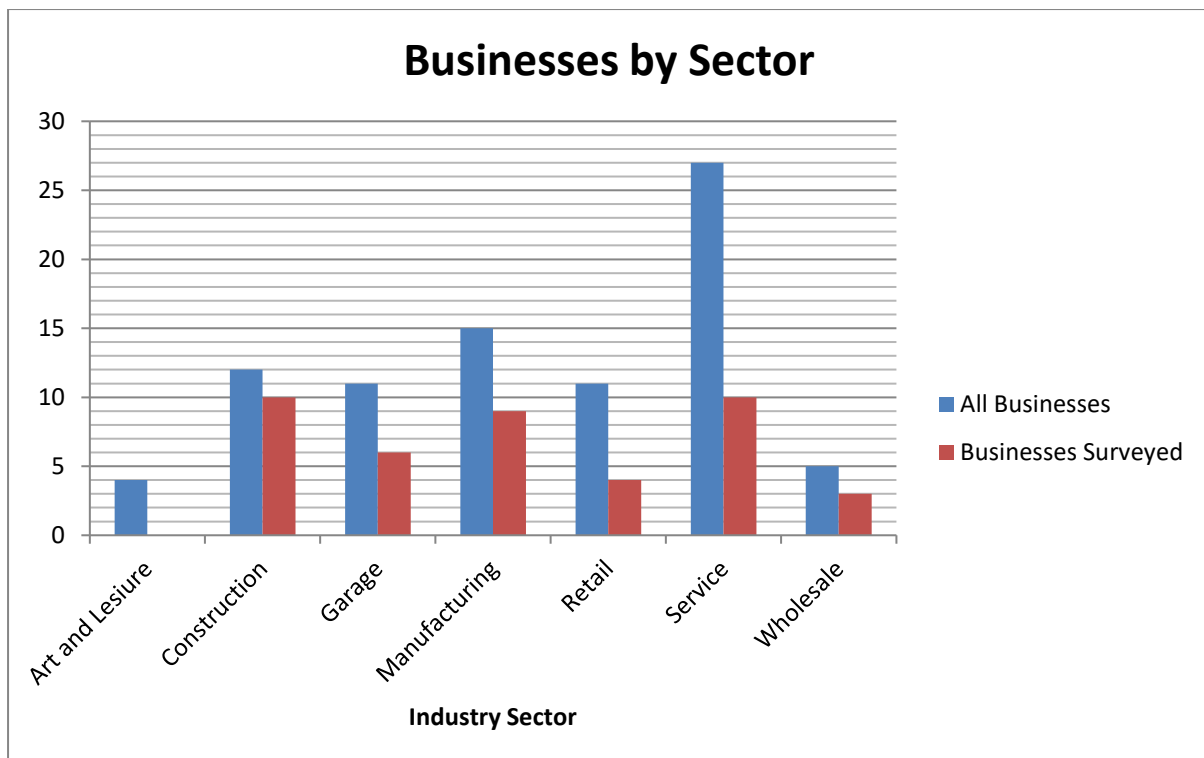


Figure 4: Type of businesses on the Industrial Estate (n=81)

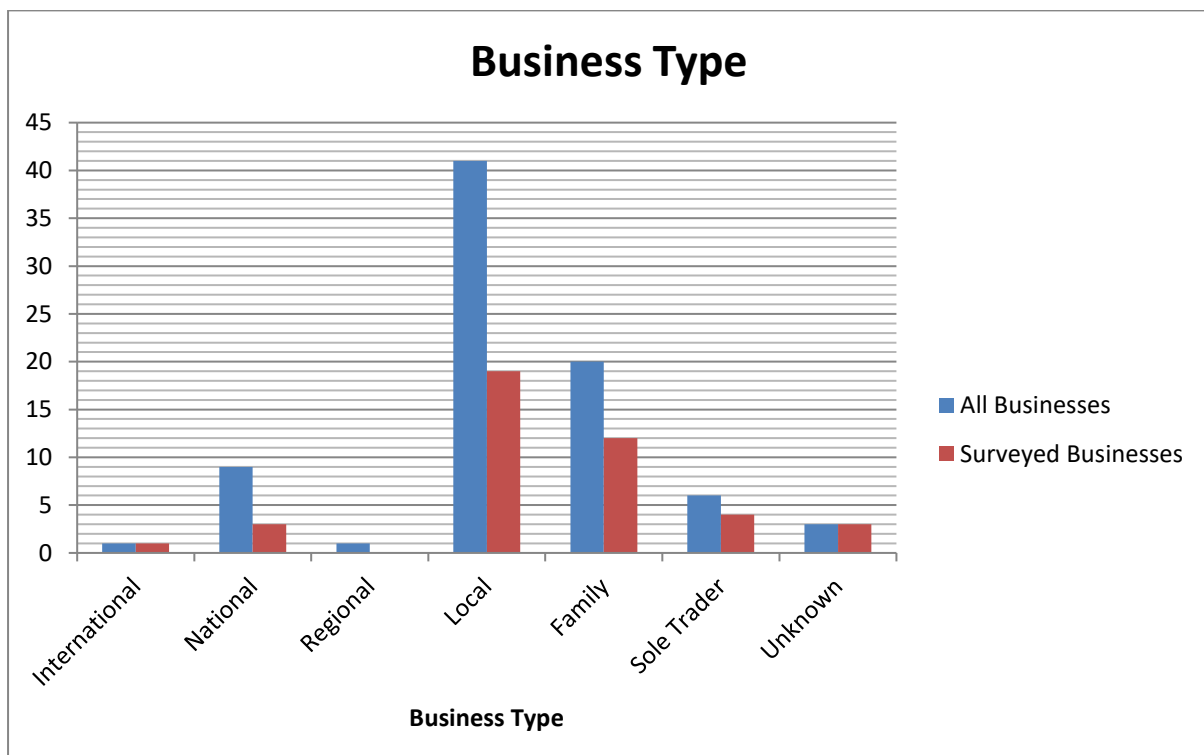


Figure 5: Market type for businesses on the Industrial Estate (n=81)

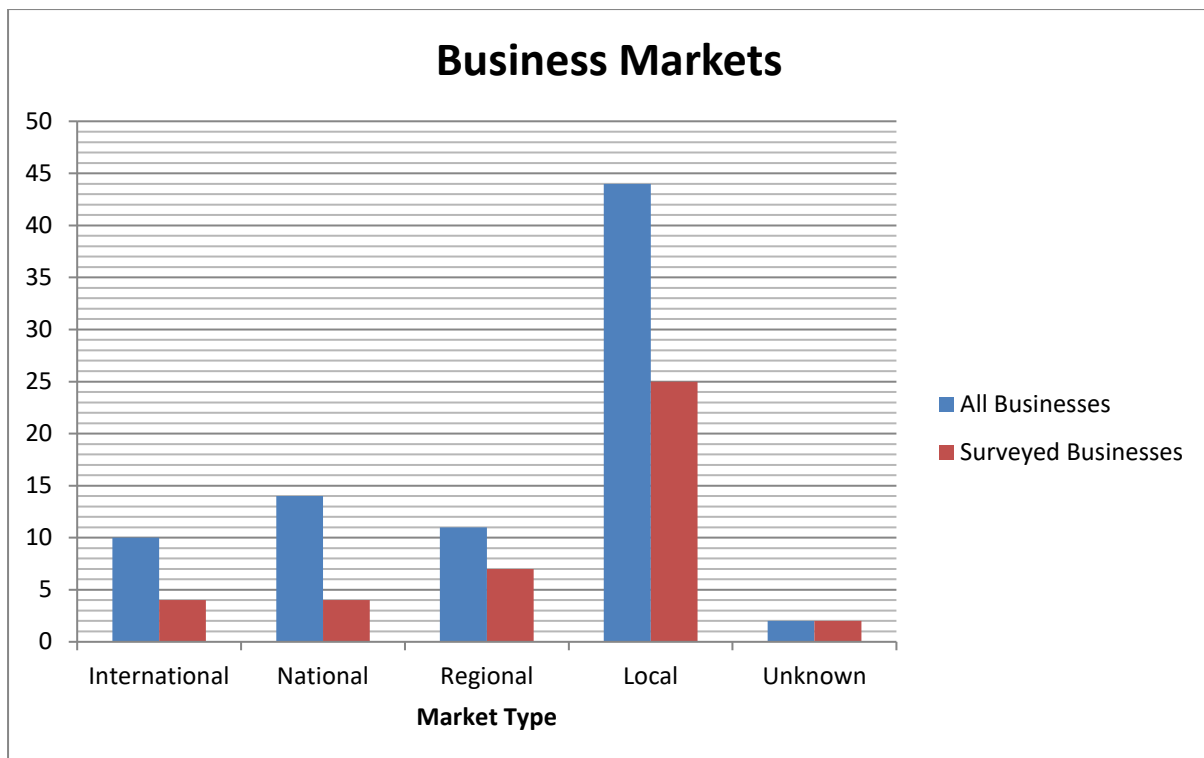


Figure 6: Business on the estate with public access (reception area, shop front etc.) from the desk-based research, split by sector.

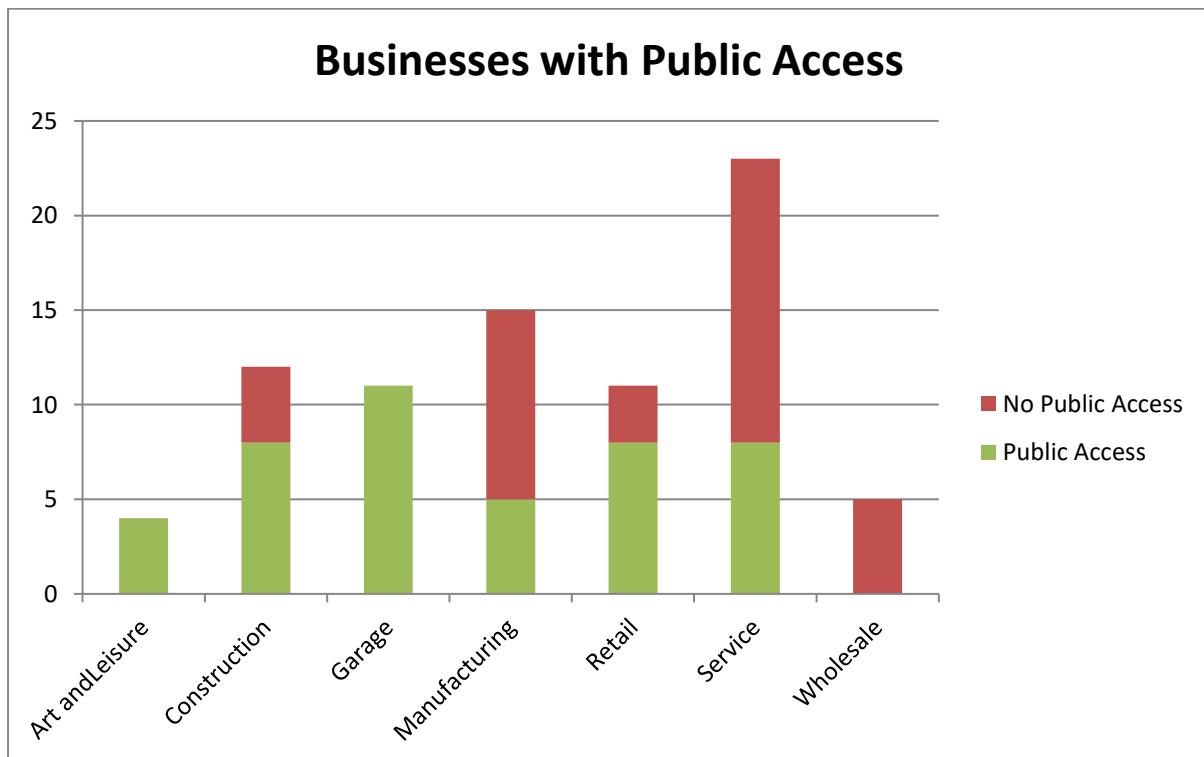


Figure 7: Age of businesses (since establishment) and the length of time businesses have been in their current premises.

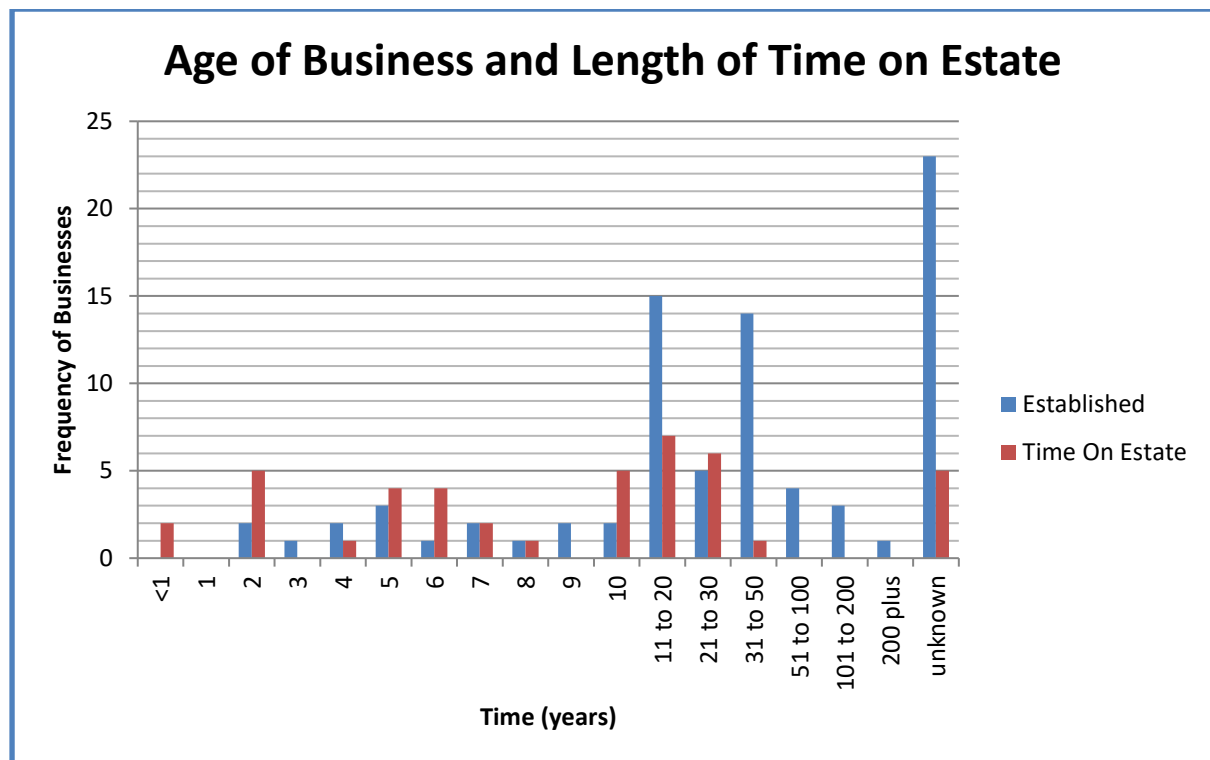


Figure 8: Number of businesses and numbers of employees (n=40)



## ***3.2 Premises***

### **3.2.1 Premises Suitability**

When asked whether their premises were fit for purpose, the general view was positive with 36 businesses (84%) agreeing that they were. Only 3 (7%) said that they were not, with 2 giving mixed views and a further 2 not responding (Figure 9). Likewise, when asked if the industrial estate was their ideal business location, 34 businesses (79%) responded 'yes', with 2 responding 'no' and 4 'don't know' (Figure 10). Positive comments given included the good parking, excellent location and proximity to the train station. For those who responded 'no' the reasoning was location based, with a desire to be on a main road. Further to this, one of the businesses who didn't know commented on the parking as a positive but visibility as a negative.

### **3.2.2 Willingness to move**

Despite the positive response of premises being fit for purpose, only 20 businesses were certain they were not willing to move to access better facilities, representing 48% of respondents (Figure 11). This suggests that despite being happy with their current premises, some businesses would consider moving if the ideal premises became available to them. For those who were not willing to consider moving reasons given included; ownership of the premises, the convenience of the location and wanting to remain on the estate.

### **3.2.3 Shop Fronts**

Not all businesses with public access (Section 3.1.4) had a shop front, and likewise some with no public access reported having a shop front elsewhere. Out of the 42 businesses surveyed 18 (43%) had a shop front, 12 of which were on the estate with 2 online and 1 elsewhere (3 blank responses) (Figure 12).

## ***3.3 Ownership***

30% of businesses surveyed owned their premises, while 49% leased and 21% didn't know (Figure 13). There were a range of lease types and lengths given, but it must be noted that in many cases the representative completing the survey did not know these details (Figure 14).

Figure 9: Are your premises fit for purpose? (n=43)

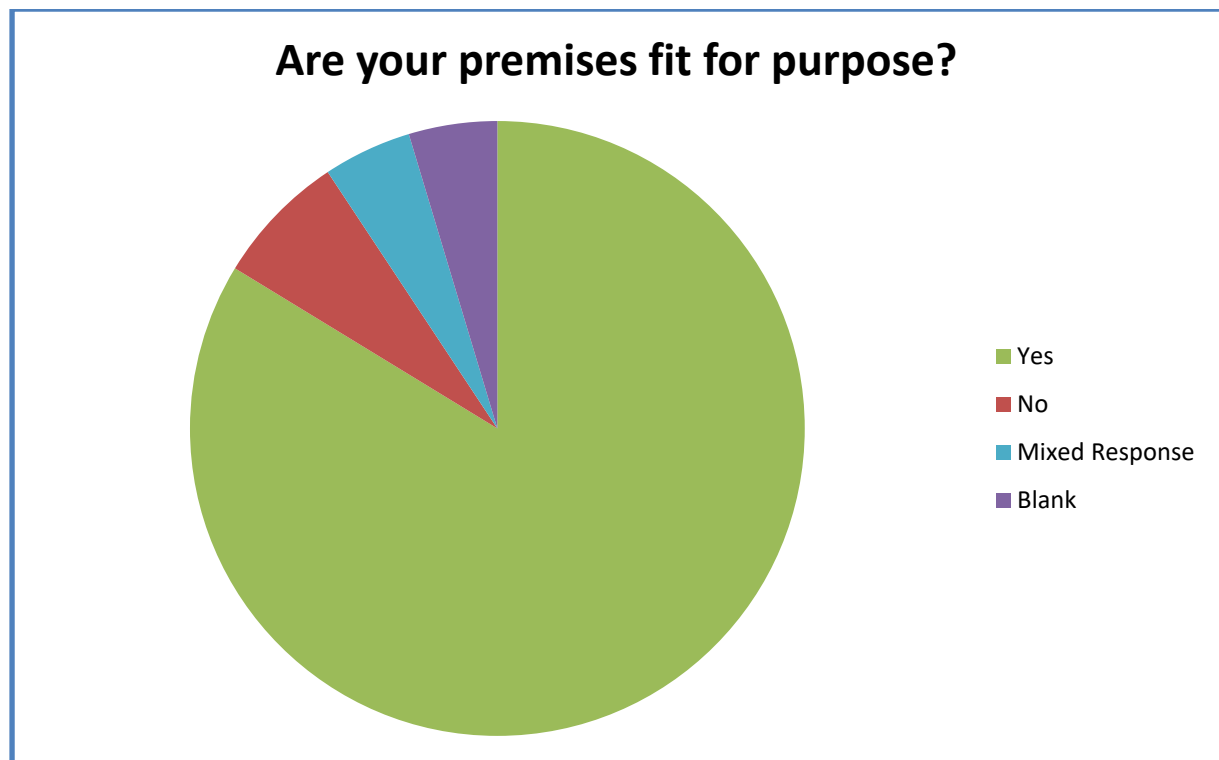


Figure 10: Businesses' views on whether the industrial estate was their ideal location (n=40)

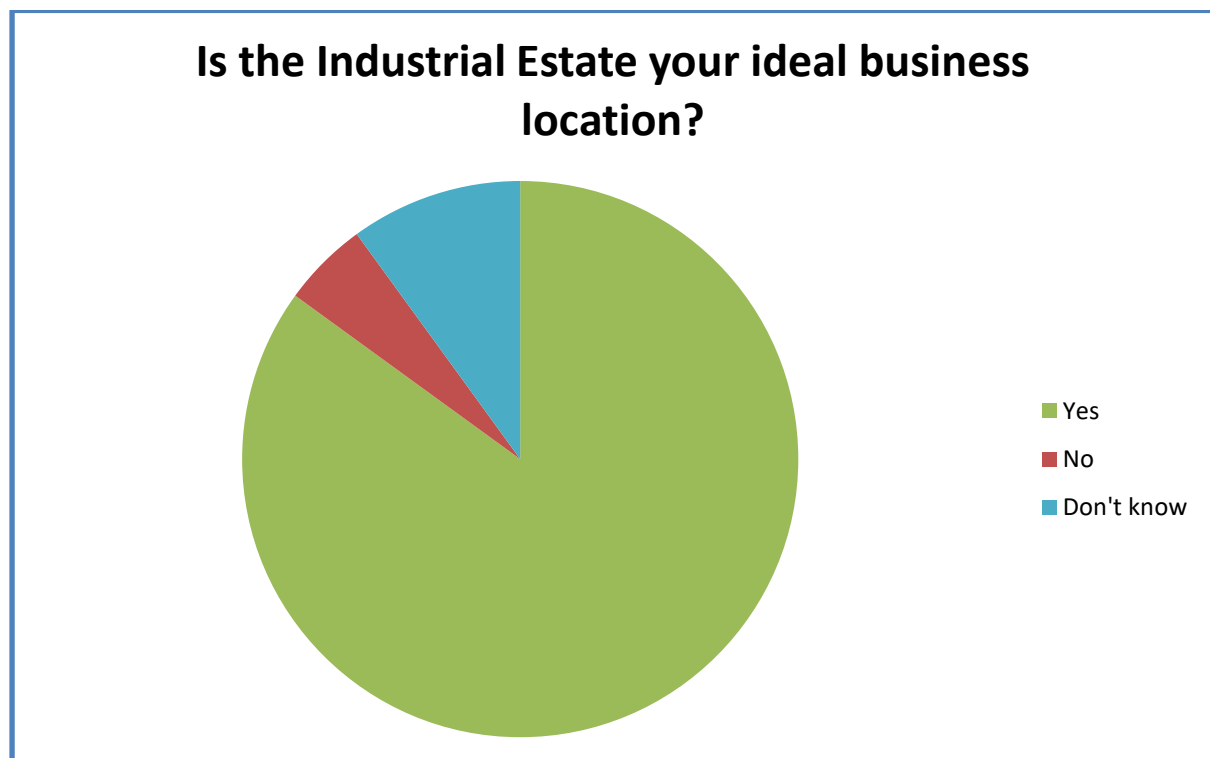


Figure 11: Businesses that would and wouldn't be willing to move from their current premises to access better facilities split by sector (n=42)

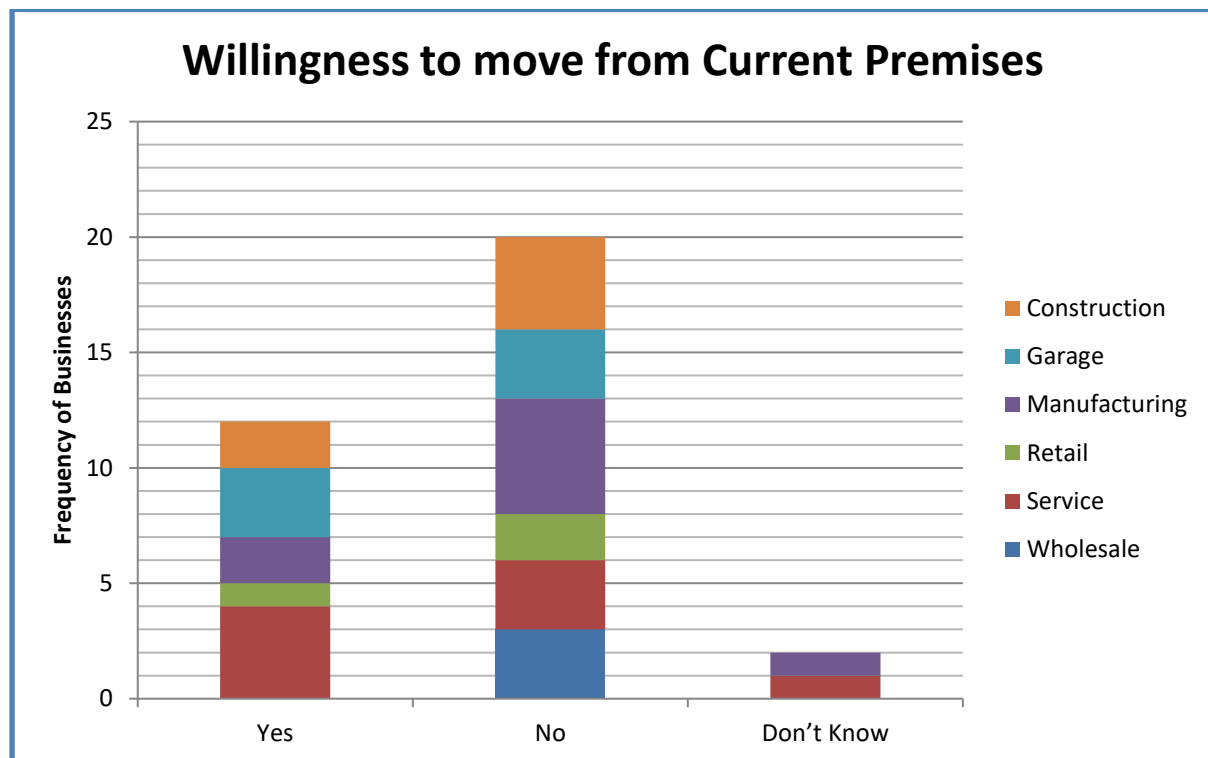


Figure 12: Businesses with and without a shopfront (n=42)

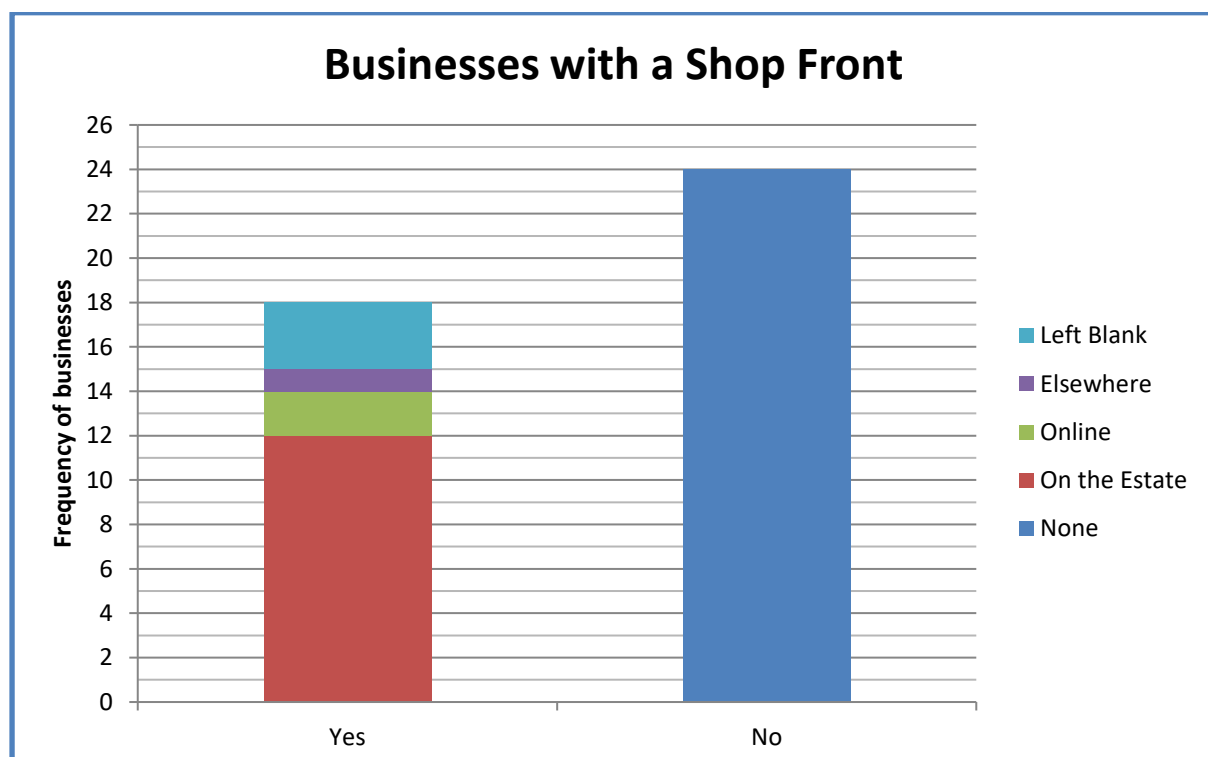


Figure 13: Ownership of Premises on the Industrial Estate (n=43)

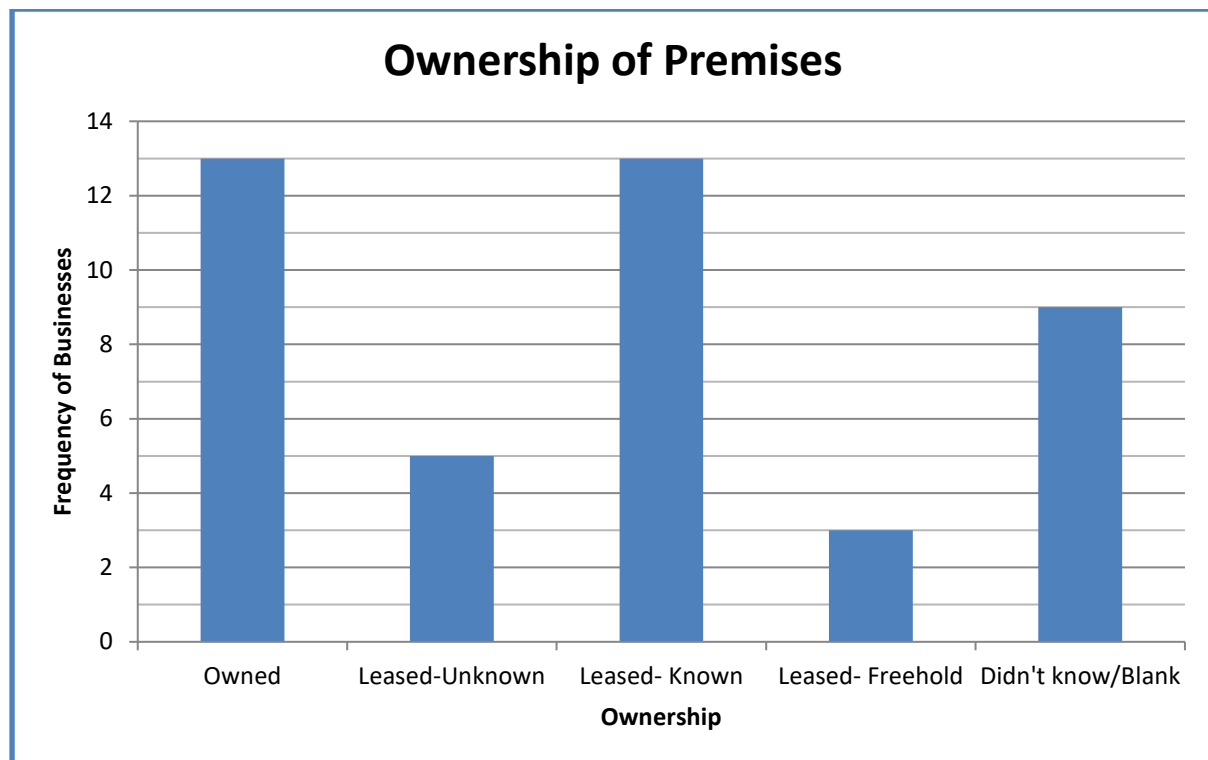
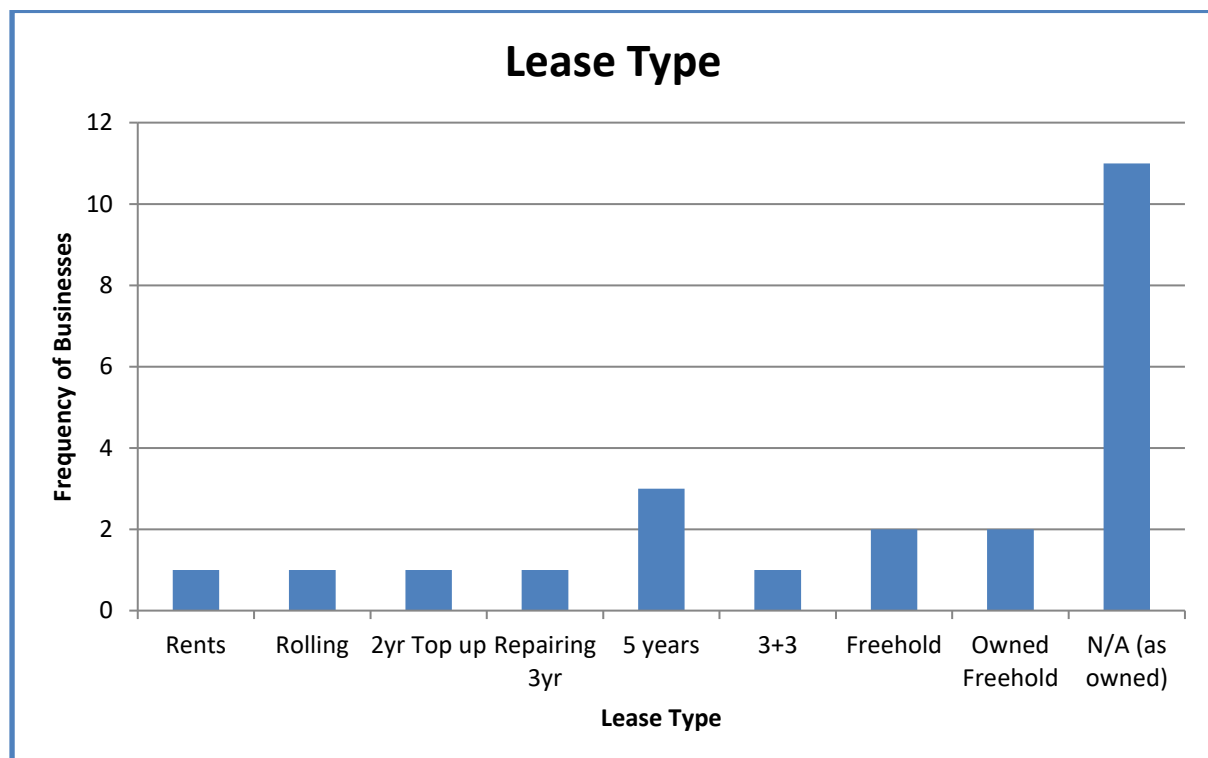


Figure 14: Lease type and lengths (n.b. this was an open question on the survey) (n=23)



## **4. Improving the Industrial Estate**

### **4.1 Project Aims**

One of the main objectives of this project was to understand what businesses on the estate felt about it and how it could be improved. This was directly addressed by asking for ideas on how to improve the estate, alongside receiving comments when asking for any other relevant information at the end. Respondents were able to give as many ideas as they wanted, with each response then being broken into its respective sections. Figure 15 summarises the number of comments received in each theme, while Table 1 gives the comments received for the four key improvement themes suggested.

### **4.2 Improvements recommended by businesses**

#### **4.2.1 Parking**

Parking was the area with the most comments received, with concern expressed over the number of people who park on the estate then walk into town which in turn limits the parking for estate users and can make accessibility difficult for deliveries. However, there were mixed views as to whether this should be addressed through parking regulations or by providing more parking.

#### **4.2.2 Signage and Presentation**

The signage upon the estate was also commented upon as needing improvement to allow for customers and deliveries to find businesses, alongside comments concerning the general presentation. Comments that were made concerned the map at the entrance being out of date and how the foliage needed cutting across the estate.

#### **4.2.3 Facilities**

Many different ideas were given for additional facilities to be put on the estate. There was a recurring request for a 'proper café', as well as for a shop and central facilities. Security was mentioned twice and included at night while improvements to the broadband and '4G' were mentioned once.

#### **4.2.4 Traffic**

Similarly, peak-time congestion was the biggest issue for traffic as it was made apparent that leaving the estate at 5pm could be difficult, with a need for an additional access point or better traffic management being identified.

#### **4.2.5 Other Comments**

In total 13 additional comments were received highlighting the spectrum of views on the estate. One business noted how despite the estate being good, they felt the access was affecting trade. Attention was also drawn to the fact that there are different types of businesses on the estate which need to be considered, while another response expressed concern at the presence of retail and facilities for the public being on the estate.

Figure 15: Themes of comments received on how to improve the Industrial Estate and the number of comments in each (n=67; respondents were allowed to make as many comments as they wished)

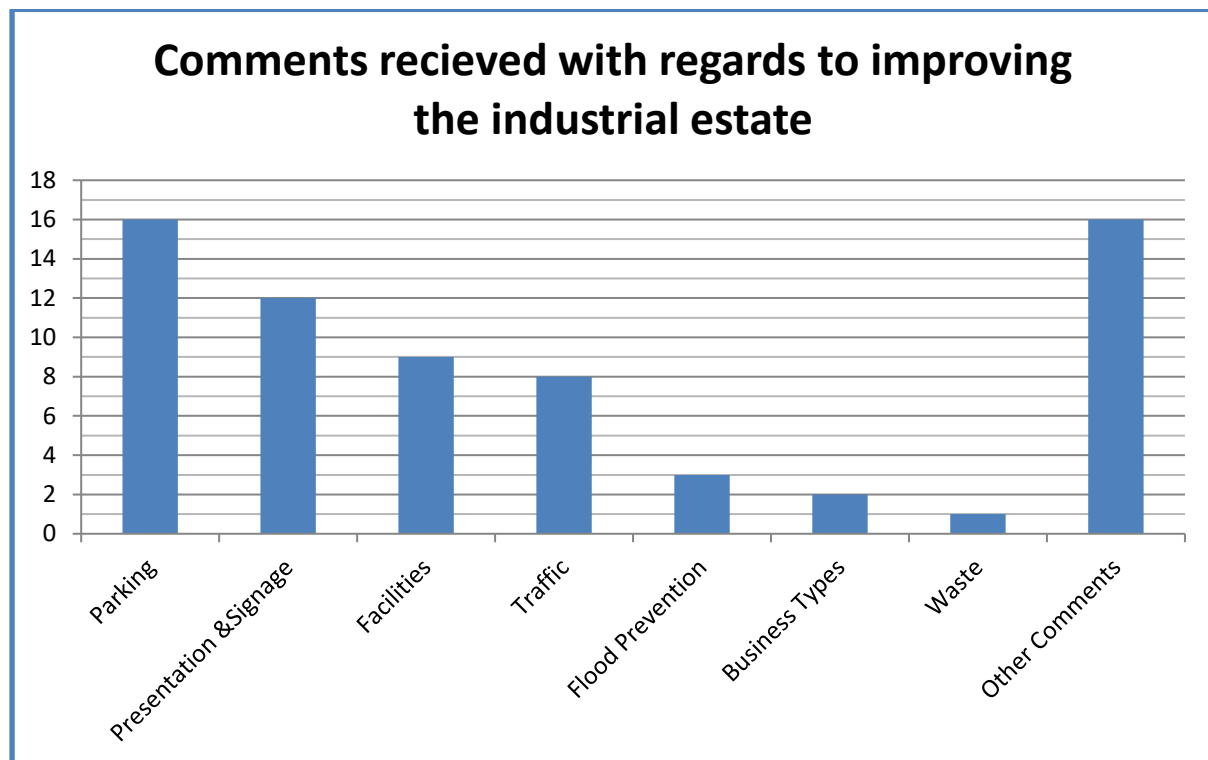


Table 1: Comments received when asked how the industrial estate could be improved

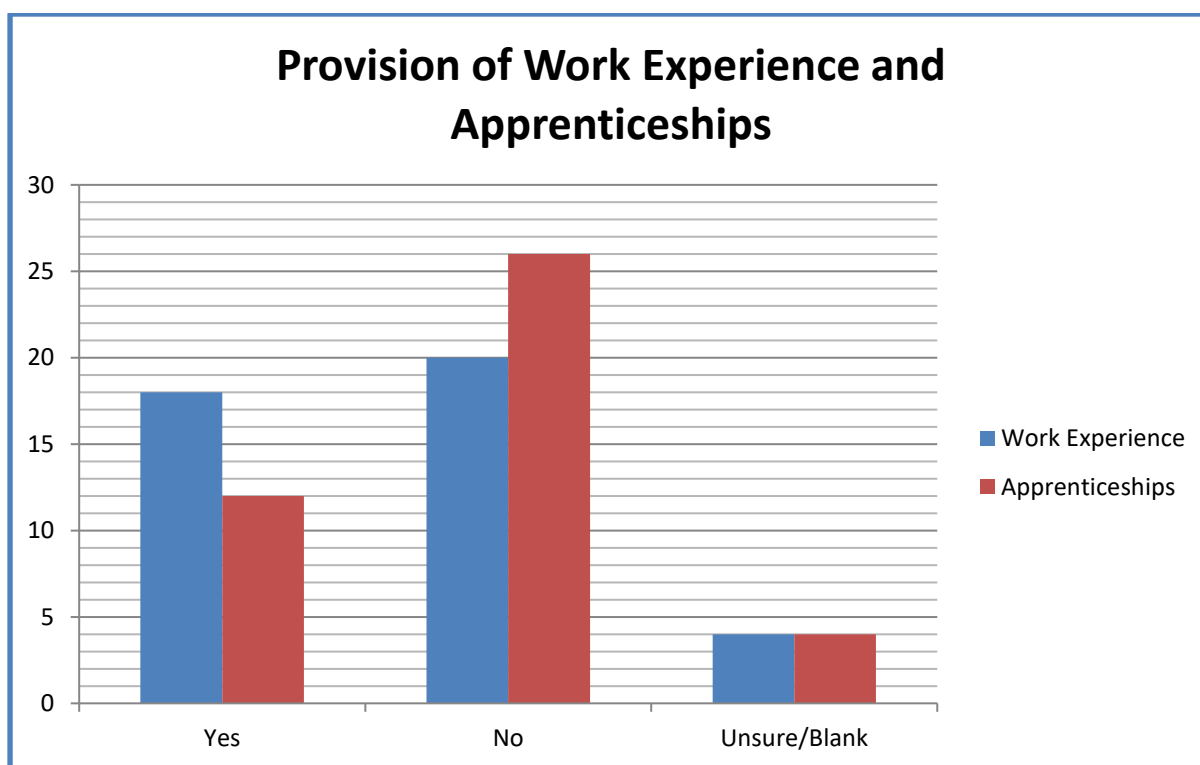
<p><b>Parking</b></p> <ul style="list-style-type: none"> <li>• Better Parking</li> <li>• Car Parking</li> <li>• Less yellow lines</li> <li>• More parking- a lot of people park for free for elsewhere</li> <li>• Multi storey carpark</li> <li>• Parking</li> <li>• Parking- delivery lorries cant access so stricter parking regulations</li> <li>• Parking for non-estate work</li> <li>• Parking- people walk into town</li> <li>• Parking- problem for delivery and fitters [when at houses?]</li> <li>• People Living on Estate</li> <li>• Remove campervans- not a camp site</li> <li>• Stop car dumping, travellers camping, town shoppers</li> <li>• Stop so many cars parking here and going elsewhere, travellers here for long periods of time</li> <li>• Travellers on road, blocking access</li> <li>• Vehicle access-due to the parking</li> </ul>	<p><b>Presentation and Signage</b></p> <ul style="list-style-type: none"> <li>• Better access and signage</li> <li>• Better signage</li> <li>• Better signage to bring customers onto estate</li> <li>• Cleaner feel at least on the front</li> <li>• Clear signage and map for business</li> <li>• Look tidier</li> <li>• Mainly improved signage</li> <li>• Map out of date</li> <li>• Poor Signage, signs not good</li> <li>• Repositioned/ more visible estate map for deliveries.</li> <li>• Signage</li> <li>• Street lights and cutting foliage on rear path</li> </ul>
<p><b>Facilities</b></p> <ul style="list-style-type: none"> <li>• 4G and Fibre broadband</li> <li>• Café- make money easily</li> <li>• Café/central facilities</li> <li>• Decent café</li> <li>• Have food facilities</li> <li>• Maybe more security</li> <li>• Night time security</li> <li>• Proper Café</li> <li>• Shop nearby e.g. spar</li> </ul>	<p><b>Traffic</b></p> <ul style="list-style-type: none"> <li>• 5pm traffic bad</li> <li>• Access points- need a bridge in</li> <li>• Left hand filter lane on exit to roundabout to improve traffic flow</li> <li>• Peak time traffic lights on roundabout crucial</li> <li>• Road network- roundabout at entrance to reduce jams, it would help if council would adopt the private road</li> <li>• Traffic- 5pm tailbacks from roundabout</li> <li>• Traffic lights on roundabout at commuter hours an impossible to get out. Security firm has CCTV and police use on this occasion</li> <li>• Traffic lights on roundabout at commuter hours an impossible to get out. Security firm has CCTV and police use on this occasion</li> </ul>
<p><b>Additional Comments</b></p> <ul style="list-style-type: none"> <li>• <b>Flood Prevention</b>- Struggle to get insurance and the town must pressure the Environment Agency to do more to prevent it</li> <li>• <b>Business Units</b>- don't let units sit unrented</li> <li>• <b>Rates</b>- more affordable rent</li> <li>• <b>Retail</b>- More retail businesses to increase footfall on the estate</li> <li>• <b>Town Assets</b>- the estate is an asset to the town and should be seen as such</li> <li>• <b>Crime</b>- address petit crime</li> <li>• <b>Seagull Nesting</b>- causing problems for businesses with roof windows and solar panels as constancy have to be cleaned</li> <li>• <b>Waste</b>- better options for trade waste needed</li> </ul>	

## 5. Community Engagement: Work Experience and Apprenticeships

The final section of the survey assessed the level of community engagement through the provision of work experience and apprenticeships. Respondents were informed that *“A key priority for the Neighbourhood Plan is securing the future for our young people with accessible local housing and livelihoods. We want to further strengthen links between KEVICC and the economic community of the Town. As a taster of the world of work, all year 10 (age 15) students are required to undertake a one week work experience in June of each year.”* before being asked about the opportunities they provide.

Of the 42 businesses 18 provided work experience and 12 apprenticeships, with 7 offering both. Where work experience was offered it was mainly linked to KEVICC or Paignton Community College, with some independents (from a charity or friend’s children), while most apprenticeships were either private or through South Devon College (Figure 16). Comments included that they would take students if there was a genuine interest in the business or if a school approached them. Reasons for not offering work experience often concerned Health and Safety and insurance, while for apprenticeships businesses were either not looking or had tried but due to there being no related courses in the area, there wasn’t a demand.

Figure 16: Responses to the questions “Are you prepared to support young people with work experience opportunities” and “Do you offer apprenticeships?” If work experience was already provided then the answer was recorded as yes.



## 6. Conclusions: Steps Forward

This report has illustrated the findings of a survey undertaken by the Totnes Neighbourhood Plan Team in June/July 2016. The estate has a large mix of uses and business types, meaning that any changes and improvements to the estate needs to take into account the variety of requirements individual businesses will have from the estate. From the issues identified by the respondents to the survey the following improvement aims can be suggested:

- Address the availability of parking on the estate for those on estate business. This includes ensuring that there is sufficient parking available but without blocking roads or access, particularly for Heavy Goods Vehicles.
- Improve the presentation of the estate, including signage as to where businesses are so that visitors to the estate can find them easily and an updated map at the entrance
- Improve the accessibility of the estate to reduce the impact of congestion on the businesses and their associates (deliveries, customers etc.)

### Notes

[1] Data taken from [companycheck.co.uk](http://companycheck.co.uk) or individual business websites

[2] SME report, available online at

[https://www.gov.uk/government/uploads/system/uploads/attachment\\_data/file/414963/bis-15-151-small-business-survey-2014-sme-employers\\_v1.pdf](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/414963/bis-15-151-small-business-survey-2014-sme-employers_v1.pdf)

## Appendix A: Survey Template

### Totnes Neighbourhood Plan Industrial Estate survey

The Totnes Neighbourhood Plan is working on a 15 year plan to improve the town in a variety of areas, one of them being the economy. Our initial evidence gathering from businesses and residents around the town, shows that people would like to see a more vibrant and lively industrial estate with better facilities and improved surroundings. We would therefore like to hear from people who own or run businesses on the estate about what improvements and changes that would be most beneficial for them.

All our data will be anonymised and aggregated, will only be used for the purposes of the Neighbourhood Plan evidence base and will not be shared with other parties. Data will be held in accordance with the Town Council data protection policy.

<b>1. Business Name</b>	
<b>2. Business Address</b>	
<b>3. Business Type</b>	
<b>4. Do you have a shop front (either on the industrial estate, elsewhere or online)</b>	
<b>5. Number of employees?</b>	
<b>6. How long have you had your premises?</b>	
<b>7. Who owns your premise's</b>	
<b>8. What type of lease do you have and what is it's length?</b>	
<b>9. Is your premises fit for purpose? Y/N</b>	
<b>10. What aspirations do you have for growth in the next 10-15 years and what factors would help you achieve this growth?</b>	
<b>11. If not, what additional space/facilities etc do you require</b>	

<p><b>12. Is the industrial estate the ideal location for your business? If not, go to question 13</b></p>	
<p><b>13. What would be the ideal location for your business?</b>  <i>Only answer this question if you replied no to question 12</i></p>	
<p><b>14. Would you be willing to move in order to access improved facilities?</b></p>	
<p><b>15. Do you have any other ideas about how the industrial estate can be improved?</b></p>	
<p>A key priority for the NP is securing the future for our young people with accessible local housing and livelihoods. We want to further strengthen links between KEVICC and the economic community of the Town. As a taster of the world of work, all year 10 (age 15) students are required to undertake a one week work experience in June of each year.</p> <p><b>16. Are you prepared to support young people with work experience opportunities?</b></p>	
<p><b>17. Do you offer apprenticeships? If yes, which college/s do you work with?</b></p>	

<b>18. Would you like further information on these areas?</b>	
<b>19. Do you have anything else you think it is important for us to know?</b>	

## Appendix B: Industrial Estate Businesses

AB Coaches	Coach Hire
Alpha Centre Owner	

Amtek Precision Engineering	Plastic injection molding tools
Anita Nowinska	Artist studio
Arbow Garage	Garage
Beco – renewables installation	Energy renewables
Bond Joinery	Joinery
Brandon Tool Hire	Tool hire
Bridge Abrasives -	manufacturing & supplying diamond and other grinding products
Build Point	Joinery
Carpetwise	Carpets & flooring
Challices – wholesale fruit and veg	Fruit & veg wholesaler
Clayton Monroe -	manufacturers and distributors of door furniture, cabinet fittings, accessories
Coyde Construction	Building construction
Daco Engineering	steel fabrication
Dart Fire (now totnes fire protection and signs ltd)	Sign & Fire equipment specialists
Dartside Art Studio	art studio,
Day Signs	Sign Makers
Devon Life	Publishers&printers
Fitness Factory	Gym Fitness centre
Former Glory Furniture	Antiques and Vintage furniture
Foundry Fabrication	– aluminium castings
Greenlife	Health & wellbeing store storage
Harrisons Garage	Garage and car sales
Hot Pursuit	Cycle company
Interline	Building supplies
Intox – manufacture breath	Breathylisers
Jewsons/Graham Plumbers Merchants	Building/Plumbing
Julian Crow Upholstery	Upholstery
JV Motors	Garage
Kingfisher	Design and Print
Lemar Engines – engine reconditioning	Engine specialist
Marketplace Ministries	Religious Charity
Nature Save	Eco insurance company
New Generation Biogas	Eco industry
NHBS	Online books store wildlife, science & environment & biodiversity equip
Noon Roberts	empty unit 560sqm
<a href="#">On track education</a>	Specialist Ed school
Optima	Low vision magnifiers, nhs contractor
Peter Tanner – Light Engineering	Light engineering
Racecourse garage	Garage
Ravenspring Ltd -	Custom built Drysuits and Sports wear
Recycle Centre	recycling and Refurnish collection point

Redpath Buchanan – lightning protection systems	Lightning conductor installer
Refurnish	NFP Furniture & appliances
Revival Life Ministeries	Charity and services for the homeless
Riverside Tyres	Tyres
Riviera Quality Foods	food products Biscuits cakes etc
Royal Mail	Mail Sorting
Samskara	Sustainable graphic design, web design and media
SCP Building Products - shop & online	Plastic & metal building products-division of Southfileds
Selective Fidelity Simulation	Simulation Trainig
SMW Roofing	Roofing
South Devon Arts Centre	Arts and culture
South Devon Rural Housing	Housing association
South Hams Maintenance Depot	Council Depot
Southfield Windows	Windows
Station Garage	Garage incor above
Surface Systems	Flooring contractor
TEKeurope	IT repairs
The Bead Room - shop	bead sales and crafts- classes
The Furniture Maker	Bespoke furniture
The Hire Shop	Equipment hire
Thompson Joinery	Carpentry
Tideford	Organic Soup/sauce producers
Tiffany Kitchens	Kitchen bathroom fitting
Tom Sawyer Waistcoats	on line clothing
Torbay Mailing	Courier services
Totnes Car Parts & Totnes Motor Engineers	Motor engineers & car parts
Totnes Flooring	Carpets and flooring
Totnes Glass and Locks	Glass and locks services
Totnes Hemp Co	Organic beauty products
Totnes Motor Engineers	Engineers motor
Totnes Tile and Bath Studio	tile bathroom suppliers and fitting
Uni-thread ltd	threaded inserts and thread repair specialists- motor bikes?
Vire Precision Engineering	precision machining
Watsons Fuels	Fuel distribution
Wired Oral Orthodontics Concept	Dental traing & ortho lab
Withheld	
Woodford Garage	Garage
Woodford Garage Motorsports (ebay shop)	garage and Parts specialist
Woodgate and Clark –	chartered loss adjusters, surveyors and claims managers