



Nathaniel Lichfield
& Partners
Planning. Design. Economics.

**Wyre Employment Land and Commercial
Leisure Study**

Wyre Borough Council

15 October 2012

MA41124/01

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1.0 Introduction

1.1 Nathaniel Lichfield & Partners [NLP] with Storeys Edward Symmons [SES] has been commissioned to undertake an Employment Land and Commercial Leisure Study [ELCLS] by Wyre Borough Council [WBC] to provide robust evidence to demonstrate the need for, and deliverability of, employment allocations across the Borough. The ELR will form a key part of the evidence base underpinning the Borough's emerging Local Plan – Strategy and Core Policies document. The Study is also required to provide an assessment of the future growth and floorspace requirements for commercial leisure in the Borough up to 2029 (i.e. 15 years from the anticipated adoption of the Local Plan).

1.2 The Study has the following objectives:

- 1 To inform the Council's strategy for the provision of a flexible portfolio of sites and premises to accommodate the Borough's future employment needs and growth aspirations during the Local Plan period;
- 2 To identify areas where capacity exists for employment land growth or rationalisation;
- 3 To establish any current deficiency in commercial leisure facilities and any subsequent need for new provision in the Borough;
- 4 To identify any potential sites for new employment provision to meet business expansion needs and provide for inward investment and assess site suitability and viability;
- 5 To critically examine the role, importance and contribution of up to 30 existing employment areas in continuing to meet employment needs, with recommendations regarding those that should be designated for protection for future employment use;
- 6 To inform the subsequent allocation of sites for employment and commercial leisure in the Local Plan Sites and Development Management document; and
- 7 To provide an understanding of the local and sub-regional property market and recommend appropriate interventions to support and bring forward economic development in the Borough.

1.3 The brief clarifies that the study should recommend an appropriate quantum of adaptable and flexible floorspace for the Borough to pursue, in terms of quality and quantity, as well as recommendations on policy interventions to stimulate development. Site specific viability appraisals will also be required to establish the deliverability of three potential employment sites.

Context

1.4 The Wyre Core Strategy Preferred Options was subject to public consultation during April-May 2012. In response to the publication of the National Planning Policy Framework [The Framework] in March 2012, WBC now intends to produce

its Local Plan in two parts – the Local Plan Strategy and Core Policies document and the Local Plan Sites and Development Management document.

1.5 In 2008 Genecon and King Sturge were commissioned by WBC to undertake an Employment Land Review [ELR]. Whilst the 2008 ELR suggested that there was a significant quantitative oversupply of employment land within the Borough to meet future needs up to 2021, it was considered that qualitative issues remain that need to be addressed in order to maintain and support future employment needs and growth in the Borough. For example, some of the existing portfolio of sites were considered to be of a poor quality and were constrained either physically or through land ownership issues, and as such the deliverability and market demand for these sites was questionable. The 2008 ELR presented a geographically unbalanced employment land portfolio across the Borough, with the majority of allocations in the urban west of the Borough and limited provision in the rest of the Borough.

1.6 In the light of the above and in response to the changing policy and socio-economic context since the 2008 ELR was prepared, WBC recognised that some aspects of the Study are now out of date and consequently a new ELR was required in order to reflect the following:

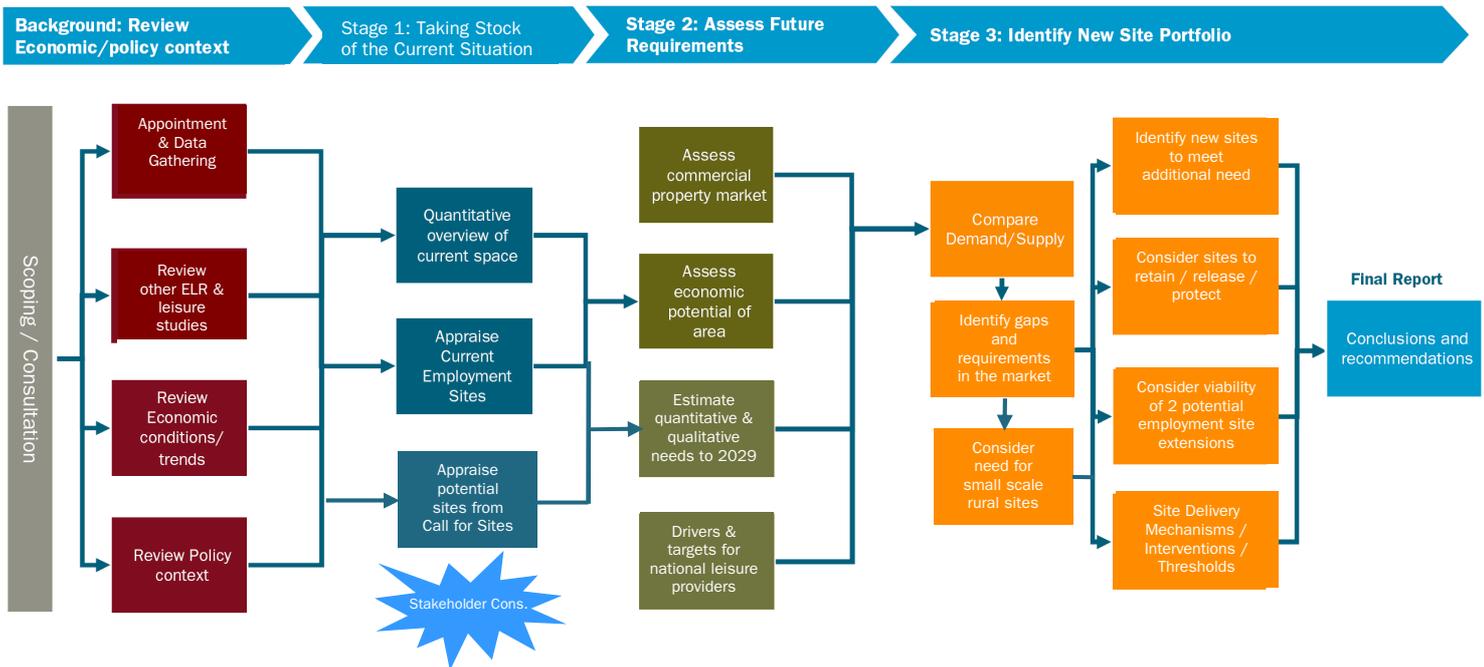
- 1 The significant changes made to the national planning policy context since 2008, including the publication of the National Planning Policy Framework [The Framework] in March 2012 and the proposed abolition of the North West Regional Spatial Strategy through the provisions in the Localism Act (2011);
- 2 The change in Government and the introduction of the Localism Act (2011);
- 3 The extended time period of the Local Plan Strategy and Core Policies document (formerly the Core Strategy) to 2029;
- 4 The global economic downturn and its impact on the development sector and property market; and
- 5 Updates to employment demand and growth forecasting.

Approach and Methodology

1.7 Our approach to these requirements is set out overleaf and broadly illustrated by Figure 1.1. It follows the principles of the ODPM's 'brown book' guidance¹ which remains extant despite the recent publication of The Framework, and other tasks as required by the Council's Brief.

¹ Employment Land Reviews Guidance Note, ODPM (2004)

Figure 1.1 Study Methodology



1.8 The study focuses on employment space needs for the group of B Use Classes indicated in Table 1.1. As stipulated by WBC, it does not consider the future land needs of other employment generating uses such as retail, tourism, healthcare and education as requirements for these uses are assessed elsewhere, although it is of course recognised that these sectors perform a critical role in providing local employment and economic growth opportunities. The needs of both B class employment land and floorspace are considered in the study, and references to ‘employment space’ are intended to mean both these elements. Industrial space in this report includes both manufacturing and distribution uses.

Table 1.1 B-class Employment Land Definitions

Office	<ul style="list-style-type: none"> Offices other than in a use with Class A2
Industrial	
Storage or Distribution	<ul style="list-style-type: none"> Storage or distribution centres – wholesale warehouses, distribution centres and repositories

1.9 A key input to this process was consultation with various organisations with an interest in the supply of employment land including employers, economic development and inward investment agencies, business groups, property

agents and developers. Alongside a Call for Sites exercise undertaken separately by WBC (which informed the site selection process), a leisure questionnaire was also sent out to 100 local commercial leisure operators within the Borough. Appendix 1 contains a list of consultees.

1.10 The study draws upon employment land studies in adjoining districts and other relevant documents including planning policy guidance, property market information, local and regional economic strategy documents, planning policy documents, economic sector studies and published economic statistics.

1.11 A key issue underlying the study concerns how the current recession in the wider economy and its implications for the commercial property market should be reflected in the analysis. However, it should be emphasised that the Council's Local Plan process will be planning for longer term needs to 2029. Therefore, the analysis is based not only on where the Wyre commercial property market has been historically but also a view on how it is likely to recover and perform in future. It is intended to take a longer term perspective of the types of sites needed.

1.12 The employment portfolio will be refined based on consultation and further evidence gathering prior to informing the Borough's Local Plan process.

Structure of Report

1.13 This document is structured as follows:

- **Study Context (Section 2.0)** An overview of Wyre Borough from a planning policy perspective, including an analysis of relevant regeneration studies and employment land contextual research.
- **Economic Context (Section 3.0)** An overview of current economic conditions and recent trends in the Borough and adjoining areas that may affect the need for employment space.
- **The Wyre Commercial Property Market (Section 4.0)** A review of the Wyre commercial property market, particularly demand for and supply of different types of employment space and any gaps in provision.
- **Stakeholder Consultation (Section 5.0)** An overview of the consultation undertaken over the course of the study involving interviews, workshops and Commercial Leisure Surveys.
- **The Current Stock of Employment Space (Section 6.0)** A brief assessment of the current stock of employment space in the Borough, including levels and types of provision and recent changes in supply as well as major developments and employment land supply in nearby areas.

- **Economic Potential and Growth Sectors (Section 7.0)** Consideration of the potential future economic role of the Borough and specific sectors with growth potential.
- **Future B-Class Employment Space Requirements (Section 8.0)** This section translates estimates of net employment land requirements into gross requirements.
- **Review of Employment Sites (Section 9.0)** An assessment of the current stock of existing / available employment sites in the Borough.
- **Demand / Supply Balance (Section 10.0)** Compares actual levels of available land with anticipated requirements to understand the extent to which new allocations will be required. Also discusses the policy choices available to WBC, alongside the needs of non-B uses and delivery mechanisms.
- **The Scope for New Commercial Leisure Facilities (Section 11.0)** Provides an assessment of the future growth and floorspace requirements of commercial leisure facilities in the Borough to 2029.
- **Summary Conclusions (Section 12.0)** Summarises the study's main findings and recommendations.

2.0

Study Context

Introduction

2.1 This section of the report provides a brief overview of the study area, followed by a summary of the relevant policy documents relating to employment land within Wyre.

Geography and Connections

2.2 Wyre is a largely rural Borough within the Fylde Coast Sub-Region (also known as the Fylde Peninsula), comprising the local authorities of Wyre, Fylde and Blackpool. This area accommodates over 328,000 residents and is recognised as a major UK tourist destination.

2.3 Wyre itself is bounded by the local authorities of the City of Lancaster (to the north), Ribble Valley (to the east) and the City of Preston, Fylde and Blackpool (to the south). To the west of the Borough is Morecambe Bay. It has a population of 108,000, spread over an area of 109 square miles, of which more than 70% is concentrated along a coastal peninsula stretching from Fleetwood in the north to Poulton-le-Fylde in the south, with Cleveleys and Thornton located in between. These towns form part of a continuous urban area which stretches southwards into the neighbouring boroughs of Fylde and Blackpool. In contrast, the area located to east of the Wyre Estuary is predominantly open countryside (some of which forms part of the Forest of Bowland AONB) interspersed with small rural settlements and the market town of Garstang.

2.4 The southern part of the Fylde Coast has good access to the strategic highway network, with the M55 providing a motorway link to junction 32 of the M6 at Preston. By contrast, Wyre has relatively poor road access; the M6 cuts through the eastern end of the Borough, but there are no junctions on this stretch of the motorway. The A585 links the Borough's main towns to junction 3 of the M55, but this is a single-carriageway road in need of upgrading.

2.5 Public transport provision includes a network of bus routes connecting residents to destinations within the Borough and beyond. Train services in the area are limited and restricted to a branch line service between Blackpool and Poulton-le-Fylde, and onwards to Manchester Airport (hence there is some wider accessibility). Investigations are ongoing to reopen the Fleetwood Branch Line, providing a service between Preston and Fleetwood, whilst the tram provides an efficient service between Fleetwood and Blackpool. For international transport links, the Borough is located in close proximity to Blackpool Airport and within a 1 hour 30 minute drive of both Liverpool John Lennon and Manchester Airports.

- 2.9 The responsibility will therefore fall to LPAs to set employment land requirement figures for their Local Plan. Local land targets will be tested through the Local Plan process and local authorities will need to collect and use reliable information to justify employment land supply policies.

Localism Act (2011)

- 2.10 Section 110 of the Localism Act sets out a ‘duty to cooperate’ for all local planning authorities and county councils in England. The new duty relates specifically to matters of sustainable development or strategic issues which will have a significant impact on more than one local planning area. The Act places a duty on local planning authorities to set out specific policies to address these strategic issues and requires them to consider joint approaches to policy and plan making.
- 2.11 The Framework (2012) sets out where co-operation might be appropriate and what form it might assume. It concludes that “*cooperation should be a continuous process of engagement from initial thinking through to implementation*” [¶181].

National Planning Policy Framework (March 2012)

- 2.12 The Framework sets out the Government’s economic, environmental and social planning policies for England. The Framework states that the purpose of the planning system is to contribute to the achievement of sustainable development, which should be seen as a ‘golden thread’ running through both plan-making and decision taking.
- 2.13 The document states that there are three dimensions to sustainable development: economic, social and environmental. The economic role that the planning system must perform involves contributing to building a strong, responsive and competitive economy, by ensuring that sufficient land of the right type is available in the right places and at the right time to support growth and innovation; and by identifying and co-ordinating development requirements, including the provision of infrastructure [¶7].
- 2.14 Within the overarching ‘presumption in favour’ of sustainable development, the Framework identifies 12 core land use planning principles that should underpin both plan-making and decision taking. These 12 principles are that planning should (inter alia):
- Be genuinely plan-led; based on joint working and co-operation to address larger than local issues;
 - Proactively drive and support sustainable economic development...identify and then meet the housing, business and other development needs of an area, and respond positively to wider opportunities for growth;
 - promote the vitality of our main urban areas, protecting the Green Belts around them, recognising the intrinsic character and beauty of the

countryside and supporting thriving rural communities within it;

- encourage the reuse of existing resources, including conversion of existing buildings;
- prefer development land of lesser environmental value;
- encourage the effective use of land by reusing previously developed land;
- promote mixed use developments; and
- actively manage patterns of growth to make the fullest possible use of public transport, walking and cycling, and focus significant development in locations which are or can be made sustainable[¶17].

2.15 The Framework states that ‘significant weight’ should be placed on the need to support economic growth through the planning system. To help achieve economic growth, Local Plans should:

- set out a clear economic vision and strategy for their area which positively and proactively encourages sustainable economic growth;
- set criteria, or identify strategic sites, for local and inward investment to match the strategy and to meet anticipated needs over the plan period;
- support existing business sectors, taking account of whether they are expanding or contracting and, where possible, identify and plan for new or emerging sectors likely to locate in their area. Policies should be flexible enough to accommodate needs not anticipated in the plan and to allow a rapid response to changes in economic circumstances;
- plan positively for the location, promotion and expansion of clusters or networks of knowledge driven, creative or high technology industries;
- identify priority areas for economic regeneration, infrastructure provision and environmental enhancement; and
- facilitate flexible working practices such as the integration of residential and commercial uses within the same unit [¶21].

2.16 The Framework also highlights that allocated employment sites for which there is no reasonable prospect of development should not be protected in the long term. Proposals for alternative uses on such sites should be treated on their merits having regard to market signals and the relative need for different land uses to support sustainable local communities [¶22].

2.17 The Framework confirms that offices are a ‘main town centre use’, and as such, LPAs must allocate a range of office sites that meet identified needs in full. LPAs should apply a sequential test to planning applications for main town centre uses that are not in an existing centre and are not in accordance with an up-to-date Local Plan:

‘They should require applications for main town centre uses to be located in town centres, then in edge of centre locations and only if suitable sites are not available should out of centre sites be considered. When considering edge of centre and out of centre proposals, preference should be given to accessible sites that are well connected to the town centre.

Applicants and local planning authorities should demonstrate flexibility on issues such as format and scale. [¶24]

- 2.18 This sequential approach should not be applied to applications for small scale rural offices or other small scale rural development. Furthermore, LPAs should normally approve planning applications for change to residential use and any associated development from commercial buildings (currently in the B use classes) where there is an identified need for additional housing in that area, provided that there are not strong economic reasons why such development would be inappropriate [¶51].
- 2.19 In addition, The Framework requires planning policies to support economic growth in rural areas in order to create jobs and prosperity. In promoting a strong, rural economy, local and neighbourhood plans should, inter alia:-
- Support sustainable economic growth and expansion of all types of business and enterprise in rural areas, both through the conversion of existing buildings and well designed new buildings;
 - Promote the development and diversification of agricultural and other land-based rural businesses;
 - Support sustainable rural tourism and leisure developments that benefit businesses in rural areas, communities and visitors, and which respect the character of the countryside. This should include supporting the provision and expansion of tourist and visitor facilities in appropriate locations where identified needs are not met by existing facilities in rural service centres [¶28].
- 2.20 Planning policies are also expected to promote competitive town centre environments by allocating a range of suitable sites to meet the scale and type of leisure, tourism, cultural and community development needed in, or on the edge of, town centres. The Framework requires the needs for these uses to be met in full and not compromised by limited site availability [¶23].

The North West of England Plan - Regional Spatial Strategy to 2021 (2008)

- 2.21 The Localism Act 2011 makes provision for the abolition of RS. However, it remains part of the development plan and the policies contained within it still remain a material consideration in considering planning applications.
- 2.22 The RS for the North West provides a framework for quantifying the ‘appropriate provision’ for employment land within its sub-regions. As Wyre falls within the Lancashire sub-region (encompassing 14 local authorities), the additional allocation of land required over the period 2005 – 2021, as set out in Policy W3 (Supply of Employment Land) is 1,136ha. However, this rises to 1,363ha if a flexibility factor is incorporated, allowing for special circumstances such as the expansion requirements of a particular business or the realisation of significant inward investment potential, requiring an additional allocation of 294ha.

- 2.23 The reasoned justification for Policy W3 emphasises that in rural areas, employment opportunities are not necessarily associated with the allocation of new development land. It advises that agriculture will continue to play an important role in the economy, but that the need for agricultural diversification is pressing. It suggests that priority should be given to economic activity that has strong links to the area in questions, be it food and drink processing, tourism and leisure, the conservation of natural, cultural and historic resources and businesses that are ancillary to farming and forestry. It also advises that demand for employment land to be released for other uses is particularly strong in parts of the Central Lancashire City Region.
- 2.24 Policy CLCR1 (Central Lancashire City Region Priorities) suggests that the main foci of the Central Lancashire City Region are the City of Preston and the towns of Blackburn, Blackpool and Burnley. Whilst settlements in Wyre are excluded from this list, it is noted that Blackpool is the centre of the wider Fylde coast urban area including Fleetwood, Thornton and Cleveleys. The RS also seeks to support and diversify the rural economy, achieving increased prosperity in the smaller towns, villages and rural communities.
- 2.25 Other relevant policies include RDF3 (The Coast), which requires plans and strategies to enhance the economic importance of the coast and the regeneration of coastal communities. Policy RT6 also requires that plans and policies to support the economic activity generated and sustained by the Region's major ports.
- 2.26 Policy RT6 (Ports and Waterways) advises that the North West region will optimise the use of its ports and waterways assets for leisure purposes.

Wyre Local Plan (1999)

- 2.27 The Wyre Local Plan was adopted in 1999 and covers the period 1991 – 2006. Whilst its policies are therefore time-expired, many of them have been saved in order to avoid the creation of a policy vacuum whilst new policy documents are being prepared.
- 2.28 Saved Policy EMP3 (New Allocations) makes provision for about 19.6ha of new land for employment and economic development (principally for industry, warehousing, B1 offices and distribution) in the following locations: to the east of Fleetwood Road, Thornton (adjacent to ICI Hillhouse International); south of ICI Hillhouse International, Thornton and adjacent to the existing industrial estate on Catterall Gates Lane, Catterall.
- 2.29 Saved Policy EMP8 (Existing Industrial Areas) seeks to safeguard existing and proposed employment areas for primarily industrial or business development in order to retain a choice and diversity of jobs in Wyre.
- 2.30 Saved Policy EMP12 (Diversification of the Rural Economy) recognises that agriculture is no longer a major employer in many areas and therefore

encourages proposals which would facilitate the diversification of the rural economy where the following criteria is satisfied:-

- The scale and nature of the activity is not detrimental to the character of the area, and
- Any new buildings are shown to be necessary and appropriate to a rural location, and
- The proposed use does not conflict with adjacent land uses nor adversely affects the economic viability of a farming or other unit, and
- The proposal fully satisfies Policy SP14 (Standards of Design & Amenity)

2.31 In line with Policy EMP12, saved Policy EMP13 (Conversion of Rural Buildings in Countryside Areas) supports the change of use of rural buildings in countryside areas for employment generating uses where these can be accommodated without adversely affecting the immediate locale, the road network and the surrounding environment.

2.32 There are three saved policies in the Wyre Local Plan, which relate to the further development of commercial leisure facilities. Policy TREC3 (Lancaster Canal) supports proposals for tourism related and commercial leisure facilities, which are wholly or primarily canal-related on or adjacent to existing canal basins or marina facilities at: the canal basin, Garstang; Nateby Crossing Lane, Nateby; and Greenlands, West of A6, Mysercough.

2.33 Policy TREC8 (Existing and Additional or Improved Sports and Recreational Facilities) seeks to safeguard existing sporting and recreational facilities whilst Policy TREC10 (Golf Courses and other Outdoor Recreational Facilities) generally supports new golf courses and other outdoor recreation facilities and activities, where specific criteria is complied with.

Wyre Core Strategy: Preferred Options (April 2012)

2.34 The Core Strategy will now become the Local Plan Strategy and Core Policies document for Wyre Borough, and will constitute the Development Plan for Wyre up to 2029. The Preferred Options Core Strategy document (which is in draft and subject to further consultation and change), seeks to focus the majority of development activity on the borough's main settlements of Fleetwood, Thornton, Cleveleys, Poulton-le-Fylde and Garstang and Catterall. In ensuring a prosperous and sustainable local economy, the draft Core Strategy identifies seven priority outcomes:

- 1 Reviewing the existing supply of employment land in Wyre and providing a portfolio of sites to meet business needs locally, ensuring a suitable geographical distribution between urban and rural areas;
- 2 Allocating a minimum of 80 ha of good quality deliverable employment land for use to 2021;
- 3 Supporting the diversification of Wyre's rural economy, where this is compatible with objectives of conserving and enhancing the countryside;

- 4 Protecting and enhancing the role and function of Fleetwood as a regionally important port, including improving port and port related infrastructure;
- 5 Protecting land and premises for industrial and business uses within existing industrial and business areas;
- 6 Developing a modern Wyre tourist economy and infrastructure that complements the nationally important tourist destination of Blackpool and maximises benefits from proximity to it; and,
- 7 Facilitating the provision of an adequately trained labour force to meet business needs in Wyre, now and in the future.

2.35 Policy CS1 (Spatial Strategy for Wyre: Distribution of Development) identifies nine spatial areas within the Borough (Fleetwood, Thornton, Cleveleys, Poulton-le-Fylde and Carleton, Rural West, Central Rural Plain, Garstang and Catterall, Rural East and Uplands, and Wyre Sands), each of which benefit from an Area Strategy. The Policy also advises that an adequate supply and range of sites will be provided for the period 2011 to 2028 through the provision of 96 ha of employment of land. Sites are expected to be distributed as follows:-

- Fleetwood: 17 ha
- Thornton: 62 ha
- Poulton-le-Fylde: 1 ha
- Garstang and Catterall: 16 ha

2.36 Policy CS1 also promotes the development of three key employment (B use class) hubs at Hillhouse (Thornton), Poulton-le-Fylde and Catterall. The Port of Fleetwood is to be protected for B-Class uses and related sui generis uses. No formal employment allocations are proposed for Rural West, the Central Rural Plain and the Rural East and Uplands, reflecting the scale at which development for employment uses is perceived appropriate in the countryside. Notwithstanding this, the importance of diversifying the rural economy is recognised.

2.37 The proposed preferred policy approach in respect of the Fleetwood-Thornton Strategic Site (Policy CS12) is to provide sufficient land to facilitate the delivery of approximately 76 ha of employment and 1,300 dwellings to 2021. This comprises 14 ha of employment land within the Fleetwood area and 62 ha of employment land within the Thornton area, incorporating Hillhouse, as part of the allocation set out by Policy CS1.

2.38 The Preferred Options document seeks to focus the majority of future commercial leisure activity on the main settlements of Fleetwood, Thornton and Cleveleys.

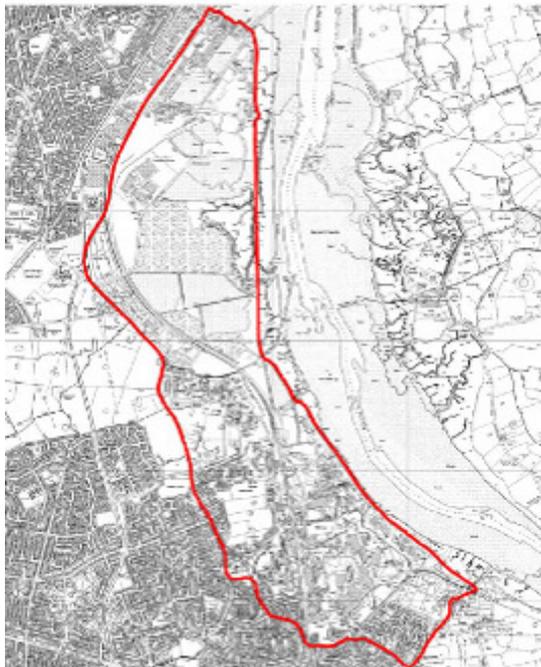
2.39 Policy CS3 (Strategy for Fleetwood) provides a strategy for the future development and management of Fleetwood, which includes making it a focus for leisure development. In particular it seeks to encourage local leisure facilities in the Fleetwood Docks Mixed Use Development Area, where

compatible with the port boundary, and to protect and enhance the Marina as a location for recreational uses.

- 2.40 Policy CS4 (Strategy for Thornton) seeks to enhance the attraction of the area for leisure and recreation by seeking to retain and enhance existing tourist facilities.
- 2.41 Policy CS5 (Strategy for Cleveleys) aims to develop Cleveleys as a prosperous, sustainable seaside town valued for its leisure facilities by maximising the vibrancy and sustainability of leisure facilities on the seafront.
- 2.42 Policy CS6 (Strategy for Poulton-le-Fylde and Carleton) seeks, inter alia, to safeguard the role of Skippool Creek as a location for the enjoyment of nautical based leisure activities.

Fleetwood-Thornton Area Action Plan (AAP) (2009)

Figure 2.2 The Fleetwood-Thornton AAP Area



Source: Fleetwood-Thornton Area Action Plan

- 2.43 The Fleetwood-Thornton AAP sets the spatial planning framework for significant future regeneration and change in this area over the period to 2021. The AAP addresses the key issues facing the area and particularly focuses on delivering significant growth and development to secure the sustainable regeneration of this strategically important site (approximately 512 ha).
- 2.44 The vision for the AAP is as follows:-

“The Fleetwood-Thornton Area will be an accessible, diverse and vibrant location for mixed-development; an area which encourages distinctive enterprise in an established quality location attracting a range of high

profile businesses and investment. Through consolidation and further growth, the Fleetwood fishing and port related industries and specialist industrial sector at the Hillhouse site will continue to be important to the economic functioning of the Area, providing a significant contribution to the region's prosperity..."

- 2.45 To realise the vision for the AAP area, several objectives have been identified, including 'Plan Objective 3: Encourage Employment Opportunities'. This seeks to:-
- Develop the local economy by encouraging distinctive enterprise and attracting a range of high profile businesses and investment together with the consolidation and further growth of the Fleetwood fishing and port related industries and the specialist industrial sector at the Hillhouse site. Further employment opportunities will be encouraged through mixed-use schemes particularly at the Fleetwood Docks Mixed Use Development Area.
 - Encourage the creation of an attractive gateway into the Area (comprising a landmark development) within the Fleetwood Docks Mixed Use Development Area, which will contribute to the achievement of a high quality environment for all and a prestige location for business investment.
- 2.46 Policy 3 (Industry and Business) seeks to protect and consolidate the Fleetwood fishing and port related industries and specialist industrial sector at Hillhouse site. Accordingly it supports employment development for B1, B2 and B8 uses in the following areas: Fleetwood Docks Mixed Use Development; Fleetwood Docks Employment Area; Hillhouse Secure Site (of sub-regional significance in the contribution it makes to the local economy); Red Marsh Industrial Estate; Burn Hall Industrial Estate; Lancashire Waste Technology Park; and Land East of Fleetwood Road. Land to the northern end of the Hillhouse site, however, which forms part of the employment allocation, may be considered for residential development in order to meet any identified shortfall against identified housing requirements.
- 2.47 The supporting text to Policy 3 considers there to be significant opportunities for further employment related development within the Area and employment-generating uses should be generally encouraged. In particular there are significant opportunities to introduce a range of commercial, business and leisure uses around Fleetwood Docks, which may involve the relocation of the fish-processing park away from the Docks area. It also recognises a need for further office development, which could be incorporated in a new enterprise park within the AAP.
- 2.48 Policy 8 (Recreation and Leisure) seeks to encourage leisure uses within the Fleetwood Docks Mixed Use Development Area and to expand on the success of the existing marina as a recreational attraction.

Fleetwood Seafront Masterplan (2009)

- 2.49 The Fleetwood Seafront Masterplan outlines a series of interventions for the town that, if given the necessary support, could transform the area's fortunes within a few years whilst also setting in place a longer term programme of rejuvenation. There is a recognition within the Masterplan that certain zones represent priorities in terms of funding requirements, timescales and potential impacts, with the iconic Marine Hall being a prime example. The land-use assessment recommends that uses such as leisure, recreation, civic facilities and some limited retail uses are best suited to the sea front. These could include an adventure sports clubhouse, a 'wheels park', a pitch and putt, a discovery centre, an outdoor events arena, a leisure hub, bowling green and a conference centre.

Economic Strategy Documents

Wyre Employment Land Review (February 2008)

- 2.50 GENECON and King Sturge prepared an Employment Land Review in 2008, providing an assessment of the local economic prospects for the Borough and the current and future provision of employment land to meet the needs of the Borough to 2021.
- 2.51 The Study found that 80ha of developable allocated employment land existed in the Borough. An analysis of future quantitative requirements for employment land in the Borough concluded that up to 22 ha of land could be supported, whilst acknowledging that future growth could be accommodated with much lower levels of provision.
- 2.52 The Study also found increasingly diverse sectoral requirements, with increasing demand for sites for B1, B2 and B8 uses. In addition it was considered that Wyre had the potential to exploit a range of more specialist employment sectors, including fish processing and high value added chemical manufacture, which have special locational requirements.
- 2.53 Whilst a range of potential new employment land allocations were considered, just one site, at Copse Road Industrial Estate, was identified as a suitable employment location from a market and planning perspective.
- 2.54 The Study concluded that whilst the recommended portfolio reflected an oversupply of employment land in quantitative terms, this represented a balanced approach to creating opportunities for business growth in the range of sectors for which Wyre can demonstrate potential for competitive advantage. In addition, the spatial distribution of the site portfolio was considered to reflect policy objectives of creating growth patterns across the Borough on a polycentric basis. Nevertheless, there remained an emphasis on main urban areas as the focus for future employment development, notably on the Fleetwood-Thornton Corridor.

Wyre Employment Monitoring Report 2011 – 2012 (2012)

- 2.55 This latest Employment Monitoring Report identifies that take up of employment land on allocated sites was slow prior to April 2010. However, take up since then has been significantly greater: 13.52 ha between April 2010 and March 2011 and 3.11 ha between April 2011 and March 2012.
- 2.56 The Report notes that whilst Wyre has an oversupply of employment land, the following points should be kept in mind:
- Hillhouse is a major secure site, which is beneficial for certain types of business and contributes 59% of Wyre’s portfolio. It is likely that interest there will continue in the future;
 - Several of the sites currently allocated for employment use are deemed unsuitable as they are of poor quality and have limited/poor access;
 - Certain sites will be considered for release for alternative uses through the planning process;
 - There appears to be a lack of suitable employment land available in areas of the Borough other than the Fleetwood – Thornton corridor. There appears to be a need in the Garstang and Catterall area, as the area provides an important role in serving the economic needs of that part of the Borough.

Fylde Coast Sub-Region Visitor Accommodation Study (2009)

- 2.57 This Visitor Accommodation Study forms part of the evidence base relating to the provision of visitor accommodation on the Fylde Coast. It states that tourism is one of the key industries on the Fylde Coast, with one in ten jobs in Wyre being tourism-related. Cleveleys and Fleetwood Market contribute to the strong retail tourism offer in the Borough.
- 2.58 The Study identifies that, in 2006, Wyre attracted in excess of 3 million visitors per year, generating £191 million in spending in the local economy. More than three quarters of these were day-trippers. Whilst there has been a fall in staying visitors to Wyre over the years prior to 2006, the number of nights had increased and visitor expenditure had risen accordingly. A total of more than 740,000 staying visitors generated 3.2 million visitor nights (an average of 4.4 nights per trip), considerably above the regional average.
- 2.59 The Study notes local visitor attractions as being Fleetwood Museum, Farmer Parrs Animal World, Freeport Fleetwood (major retail outlet) and Wyre Estuary Country Park and Ecology Centre.

Fylde Coast Retail Study (2011)

- 2.60 This study forms part of the evidence base for the preparation of the Core Strategies of Blackpool, Fylde and Wyre Councils. It represents an update of the 2008 Fylde Coast Retail Study and reflects changes that have occurred over the previous three years, including the impact of the recession on leisure

expenditure growth rates. The update incorporates a revised assessment of retail spending patterns and destinations for various leisure activities.

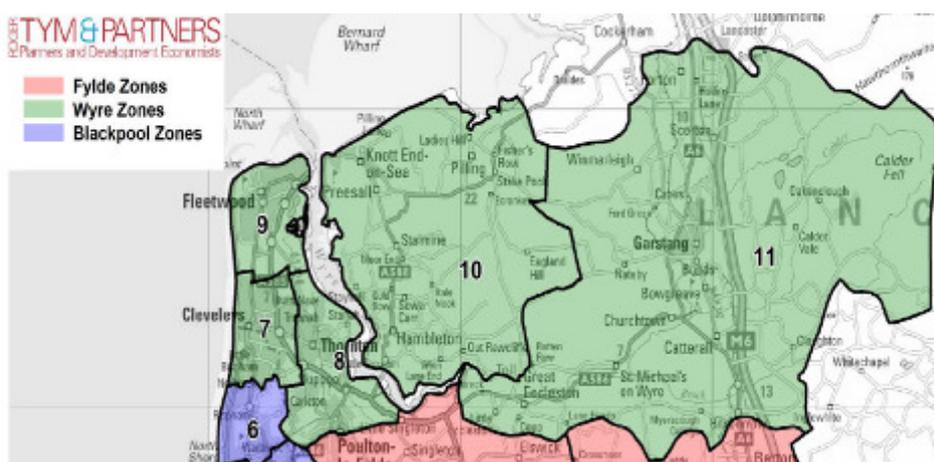
2.61 The Study was informed by survey of 6,000 households across the whole of the Central Lancashire sub-region, undertaken in January and February 2010. This sought to identify where households spent most money in relation to various types of leisure services. The most popular destinations for these leisure activities are set out, by survey zone, in Table 2.1.

Table 2.1 Main Leisure Destination by Category of Leisure Pursuit

Survey Zone	Restaurants & Cafes	Bars, Clubs and Pubs	Cinemas	Museums & Art Galleries	Family Entertainment Centres	Health & Fitness Centres	Bingo, Casino & Book makers	Theatres & Concerts
7: FY5 1, FY5 2, FY5 3	Cleveleys	Cleveleys	Vue Cleveleys	London	Blackpool	Cleveleys	Blackpool	Blackpool
8: FY5 4, FY5 5, FY6 7	Poulton le Fylde	Poulton le Fylde	Vue Cleveleys	Manchester	Blackpool	Poulton le Fylde	Blackpool	Blackpool
9: FY7 6, FY7 7, FY7 8	Fleetwood	Fleetwood	Vue Cleveleys	Manchester	Blackpool	Fleetwood	Blackpool	Blackpool
10: FY6 0, FY6 9, PR3 6	Poulton le Fylde	Poulton le Fylde	Vue Cleveleys	Manchester	Blackpool	Blackpool	Blackpool & Poulton le Fylde	Blackpool
11: PR3 0, PR3 1	Garstang	Garstang	Preston	Preston	Preston	Preston	Garstang	Blackpool

Source: Fylde Coast Retail Study (2011)

Figure 2.3 Survey Zone of Respondees to Household Survey Questionnaire



Source: Fylde Coast Retail Study (2011)

2.62 From the above, it is clear to see that Blackpool Town Centre is the most popular destination for family entertainment centres, bingo halls, casinos, bookmakers and theatre and concert venues. Given that theatres and concert

venues are most likely to be found in higher order centres, this is not surprising. Cleveleys is the most popular location for visits to the cinema whilst spending in restaurants, cafes, bars, pubs and clubs, together with visits to health and fitness centres is more localised.

- 2.63 Few respondents stated that they undertook trips to museums and art galleries. Again, as these are likely to be found in higher order centres, it is not unusual that this is dominated by Manchester and London.

Wyre Business Review of Leisure Centres

- 2.64 A review of the existing leisure facilities operated by YMCA in Wyre Borough was published in July 2012. The report, authored by Max Associates, concludes that the range of facilities across the Borough are well positioned to meet the needs of the community, but investment will be required in the medium to longer term. In particular it was found that facilities in Thornton will not be fit for purpose in the longer term. On this basis, the review recommends the redevelopment of Thornton, Garstang and Poulton Leisure Centres and assumes that once these developments are completed, Garstang Pool will be closed.

Summary

- 2.65 The key messages from this section can be summarised as follows:
- National planning policy requires local authorities to take a positive approach towards economic development, and makes it clear that applications seeking to secure sustainable economic growth should be treated favourably. LPAs should plan positively for the location, promotion and expansion of clusters or networks of knowledge driven, creative or high technology industries;
 - Wyre's emerging Core Strategy makes provision for a minimum of 80ha of good quality deliverable employment land for use to 2021, with a particular focus on the Thornton and Fleetwood area; and,
 - The 2008 ELR found that the Borough had around 80ha of developable allocated employment land. The analysis would support quantitative employment land provision in Wyre of up to 22ha, although employment forecasts suggest that future growth could be accommodated with much lower levels of provision. The review suggests that the Borough's current supply of 80 hectares exceeds realistic future requirements in purely quantitative terms.

3.0 Economic Context

3.1 This section establishes the economic context of the study by reviewing recent economic conditions and trends within Wyre in the context of the economies of the North West and Great Britain as a whole. This analysis is important in identifying the existing strengths and weaknesses of the Borough’s economy, as well as those factors likely to influence the nature and level of future demand for employment land.

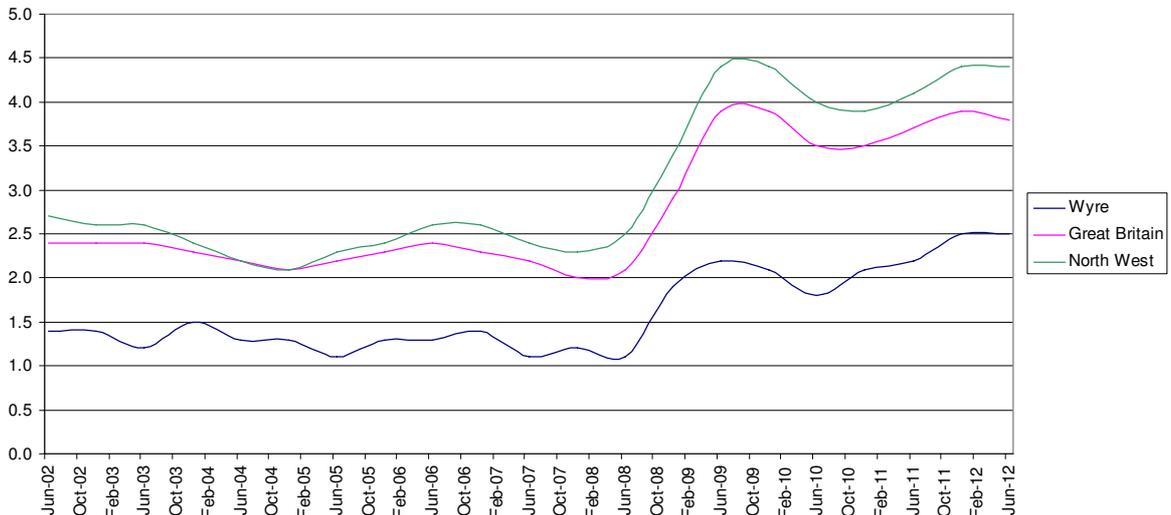
Economic Trends

Economic Activity

3.2 Following a tentative recovery from what was arguably the worst recession since WWII, 2011 and 2012 (to date) have seen weak economic growth and continuing economic uncertainty, especially in the Eurozone where the sovereign debt crisis has had a significant impact and affected global business confidence.

3.3 This, combined with austerity measures in the UK, has hit the Lancashire economy hard. For example, unemployment in Wyre (and particularly youth unemployment) has been rising, with claimant levels for Job Seekers Allowance [JSA] now surpassing levels last seen at the height of the 2007/08 recession (2.5%² of all residents).

Figure 3.1 JSA Claimant Count



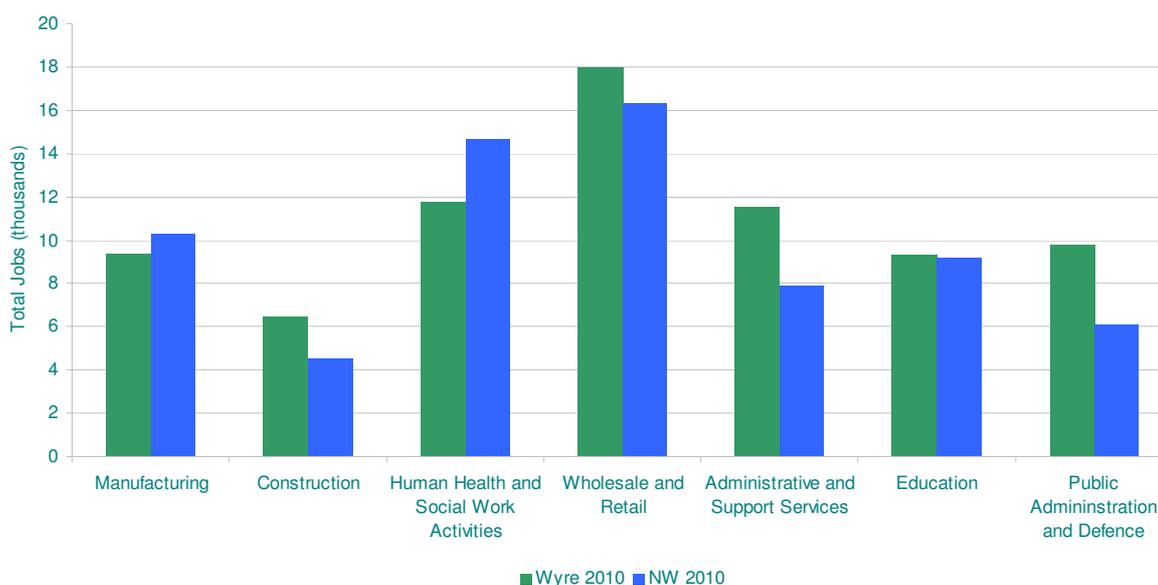
Source: ONS Claimant Count June 2012

² NOMIS JSA Claimant Counts, June 2012

- 3.4 June 2012 data shows that there were 5.9 claimant unemployed workers for every notified job centre vacancy in the Borough. This was slightly higher than the ratio for the North West (4.8) and slightly higher than that of Great Britain (4.6) and indicates that the Borough's unemployment residents have comparatively poorer prospects of obtaining work in the local area, than elsewhere in the country.
- 3.5 Considering the proportion of JSA claimants in the economy does not, however, reflect the true level of worklessness in Wyre. Indeed, DWP data for November 2011 indicates that **13.6% of the Borough's working-age population were claiming key out-of-work benefits** (comprising job seekers, incapacity benefits, lone parents and other on income related benefits). This is below the national (14.7%) and regional (17.9%) percentages.
- 3.6 However, these headline figures do not accurately reflect the current job situation in the Borough. The ONS model-based unemployment figure, which is often taken as being a more accurate reflection of the jobs market than JSA claimant counts, suggests a current unemployment rate of 6.5% in Wyre³, although this remains lower than both the North West (8.9%) and Great Britain (8.1%) rates.
- 3.7 In the 2011 Census, the residential population of Wyre was estimated at 107,749, up from 105,618 in 2001. This represents a change of 2.0% compared with national growth of 7.1%. However, the number of jobs based in Wyre has grown at a faster rate than the national average. Over the period 1998-2008, the number of employee jobs in the authority area grew by 16.1%, from 29,809 to 34,615, whereas nationally, growth of 9.5% was observed. The level of growth in Wyre over this period was also more than double the regional average (7.7%).
- 3.8 Furthermore, over the period 2008-2010, the number of jobs in Wyre's economy continued to buck the national trend and demonstrated modest growth of 3.1%, whilst over the same period, jobs in the North West and Great Britain decreased by 2.9% and 3.36% respectively.
- 3.9 Wyre's key industrial sectors comprise the Wholesale and Retail Trade (18%), Human Health and Social Work (11.8%), Administrative and Support (11.5%), and Public Administration and Defence (9.8%). The manufacturing sector accounts for a slightly lower share of employment within Wyre than at the regional level, and this is also the case for the Health sector. The proportion of employment in the typically more dynamic sectors of Finance and Insurance and Professional, Scientific and Technical Activities are well below the regional averages.

³ ONS Annual Population Survey, March 2012

Figure 3.2 Key Industrial Sectors 2010



Source: Annual Business Inquiry / BRES 2010

- 3.10 Over the period from 1998 to 2008, public administration and defence was the Borough's fastest growing sector, both in percentage and absolute terms (+1,926 employees, +159.3%). Strong growth was also observed in the construction (+70%) and education (+57.8%) sectors. For all these sectors, the rate of growth observed locally was significantly greater than the national average.
- 3.11 Conversely, a number of sectors experienced a contraction in employment over the period. Manufacturing employment fell by -28.2%, although the decline was much less pronounced than the level experienced across Great Britain (-32.9%). Transport, storage and communication also fell substantially in Wyre (-14.1%) despite national growth in the sector of 9.6%.
- 3.12 Since 2008, the modest growth was not felt uniformly across all sectors, with the business administration and support services accounting for more than double the increase in real terms, with 2,637 jobs created (+215.4%). The largest contraction in jobs was witnessed in the agriculture, forestry and fishing (-41.4%), accommodation and food services (-17.3%) and education (-9.7%).

Business Start Ups

- 3.13 Between 1994 and 2007, the number of VAT registered firms in Wyre increased from 3,125 to 3,520. This represents a growth rate of 12.64% which is far lower than the rates observed in the North West (21.1%) and Great Britain (25.9%) over the same period and indicates a weak level of entrepreneurial activity within the Borough. An analysis of business births and deaths over the post recessionary period of 2009 to 2010 shows Wyre's business community to be slightly more resilient than that of Lancashire County, the North West Great Britain as a whole. From 2009-2010 there was a 1% decrease in business deaths in Wyre compared to a 0.3% increase in Lancashire County,

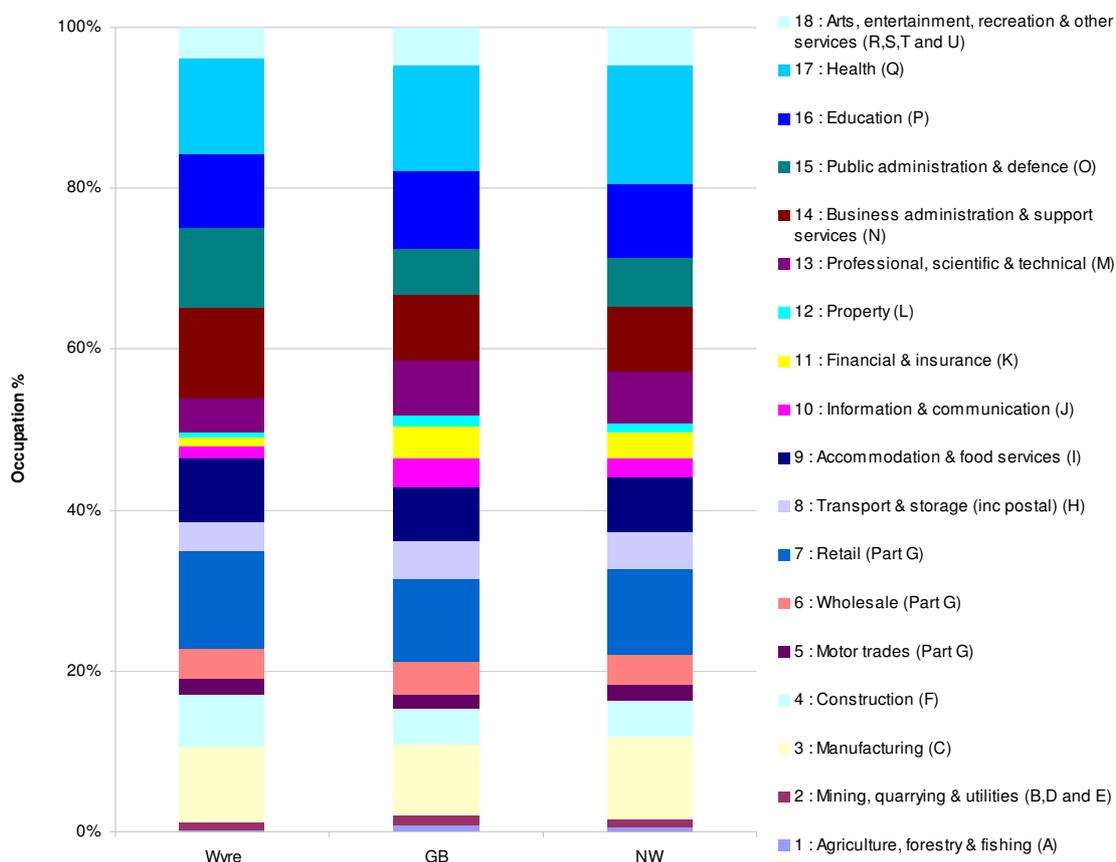
2.7% increase in the North West and a 7.5% increase nationally. Business births in Wyre increased by 3% from 2009-2010, significantly more than Lancashire County (-6%), the North West (-5%) and Great Britain (0.7%).

Economic Activity

3.14 Wyre has an estimated 49,300 economically active residents, which equates to an economic activity rate of 72%. This is slightly below the corresponding figure for both the North West (74.9%) and Great Britain (76.5%). This would suggest that there is some scope for further growth in the local economy.

3.15 The Borough has a higher than average rate of self-employment relative to national performance. There are an estimated 9,900 self-employment residents in the local authority area; approximately 14.4% of the working age population. This is well above the average of 9.4% for Great Britain, and even further ahead of the regional average of 8.3%.

Figure 3.3 Key Occupational Sectors 2010



Source: Annual Population Survey 2010

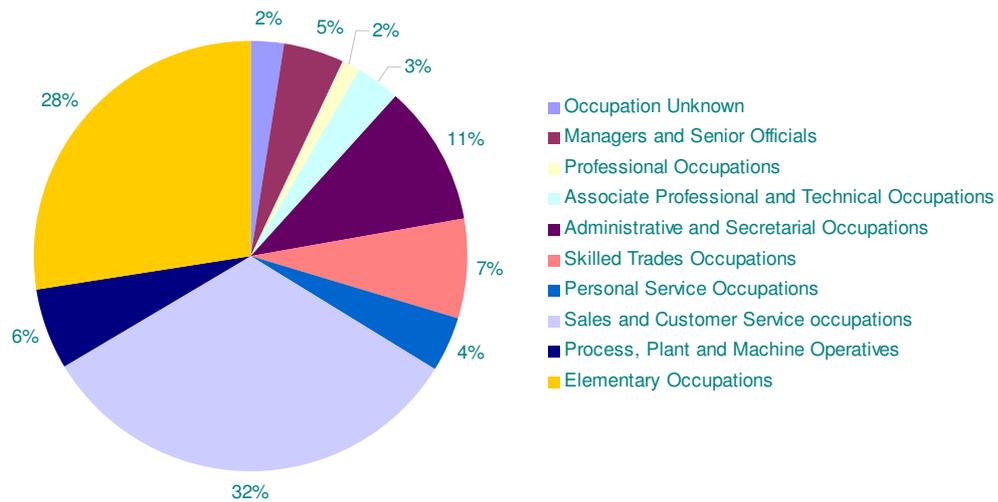
3.16 The profile of Wyre’s labour force shows that the Borough has relatively fewer highly skilled occupations and a higher proportion of lower skilled, manual jobs relative to the regional and national average. Financial and insurance occupations, for instance, account for just 1.1% of the workforce compared to 3.3% regionally and 3.9% nationally. At the same time, the proportion of the

labour force comprising of retail, business administration and support services, and public administration and defence is well above the regional and national average.

3.17 The proportion of working age residents with no qualification is estimated at 11.1% for Wyre, which is again lower than the corresponding figure at the regional level (12.0%) but slightly higher than that at the national (10.6%) level. Additionally, 31.2% of the Borough's working age population is qualified to degree level or above. Wyre performs well in terms of the regional average but needs to improve the skills base of the population further to come in line with the national average of 32.9% if Wyre is to attract more knowledge based businesses.

3.18 An analysis of the types of jobs sought by unemployed residents in Wyre is Sales and Customer Services (32.6%), well above the regional rate. Demand is also high for elementary occupations (27.5%), administrative and secretary (10.6%) and skilled trades occupations (7.3%).

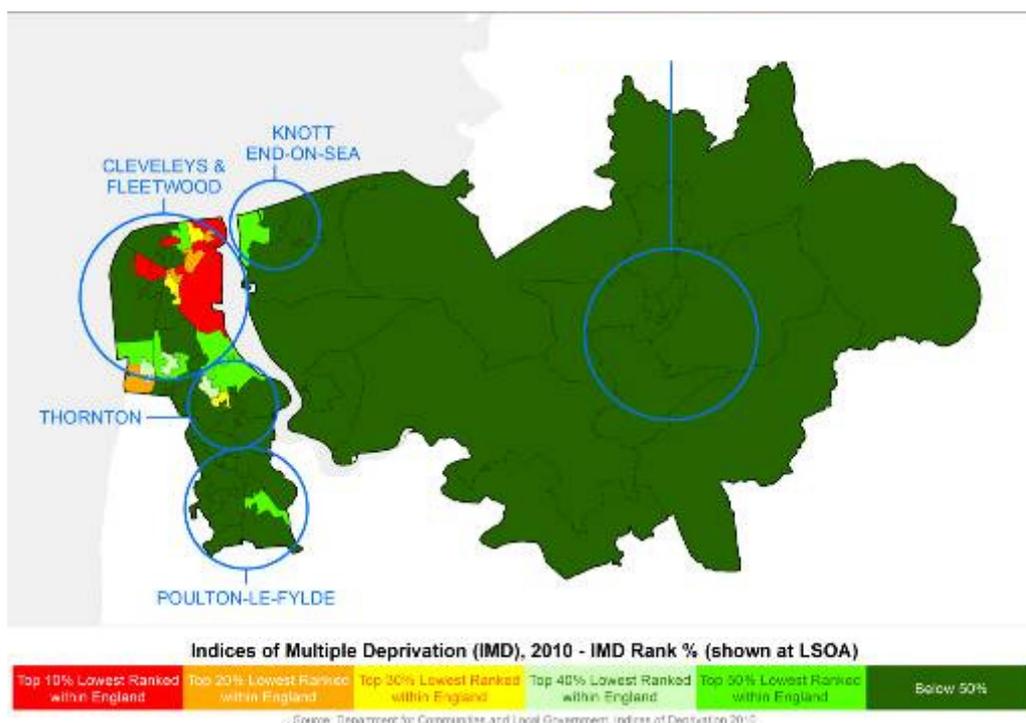
Figure 3.4 Key Occupations



Source: DWP June 2012

3.19 Wyre suffers from moderate levels of deprivation, ranked by the English Indices of Deprivation as the 185th most deprived of 326 English local authorities. Furthermore, its performance has remained relatively constant since the 2007 Deprivation Indices were published, increasing from 182nd. Wyre is characterised as the 4th least deprived district of the 12 in Lancashire County behind Fylde, Ribble Valley and South Ribble. However, analysis at a more local level (Figure 3.5) reveals much higher levels of deprivation at a local level, concentrated in the Cleveleys and Fleetwood areas.

Figure 3.5 Indices of Multiple Deprivation 2010: Wyre Borough



Source: IMD 2010

Knowledge-based Industries

3.20 All industries are, to some extent, dependent on knowledge inputs. However, some industries rely more on ‘knowledge’ than others. The term ‘knowledge-based industries’ usually refers to those industries which are relatively intensive in their inputs of technology and/or human capital. Table 3.1 indicates that only 14.8% of firms within Wyre operate in knowledge-based sectors. This is significantly below the national (21.8%) and regional (19.4%) and is the second lowest of the surrounding local authority boroughs. Wyre also has one of the poorest rankings of any district in England, ranked 297th out of 380.

Table 3.1 Competitiveness Index

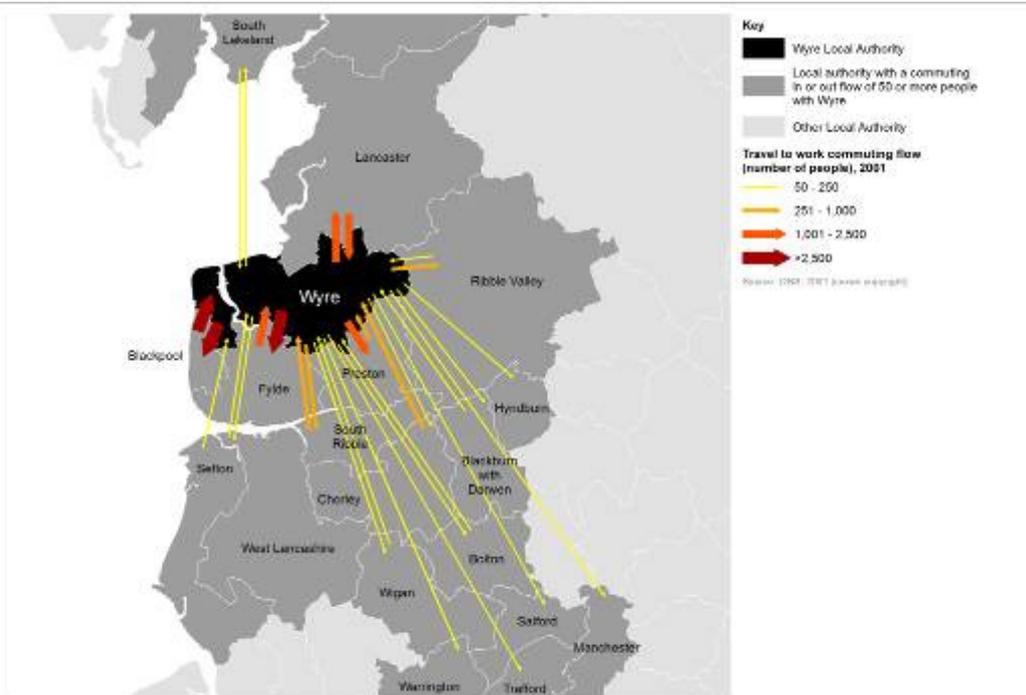
Borough	2010 (%)
Wyre	14.8
Blackpool	12.9
Fylde	20.9
Preston	19.0
Ribble Valley	18.0
Lancaster	15.3
North West	19.4
Great Britain	21.8

Source: UK Competitiveness Index 2010

Commuting Flows

- 3.21 As recorded in the 2001 Census, of 44,975 Wyre residents in employment, 20,330 regularly travelled outside of the Borough to work elsewhere. Unsurprisingly, the main destinations were the surrounding authorities of Blackpool, Fylde, Preston, Lancaster and South Ribble, the place of work for almost half of all Wyre residents in employment. At the same time, approximately 9,836 residents of other Boroughs commuted into Wyre to work – again predominantly from the other adjacent local authorities – equivalent to almost 30% of all workplace jobs in the Borough being filled by non-residents. The travel-to-work flows yield a net outflow of around 10,480 workers.
- 3.22 An area’s self-containment rate reflects the proportion of those residents in employment that work locally, as opposed to commuting elsewhere. In 2001, Wyre’s self containment was relatively low, at 55%.

Figure 3.6 Commuting Patterns: Wyre Borough



Source: ONS Census Data 2001

Summary

- 3.23 Wyre is a largely rural Borough which shares borders with Blackpool to the southwest and Lancaster and Preston to the north and southeast respectively. The River Wyre intersects the authority area with land to the west being predominantly developed and land to the east being predominantly rural hinterland. The vast majority of the area’s resident population is concentrated within the urban areas of Fleetwood, Thornton-Cleveleys and Poulton-le-Fylde in the westernmost part of the Borough.

- 3.24 Prior to the recession, the local economy in Wyre performed relatively well, recording strong increases in the size of the local business base and the total number of jobs in the Borough. This was driven by significant growth in sectors including Public Administration and Defence; Electricity, Gas and Water Supply; Construction; and Education.
- 3.25 Since 2008, jobs in the economy continued to buck national trends and have increased by 3.07%. However, significant challenges remain in an area that is overly reliant on a few relatively vulnerable industrial sectors, notably public administration, whilst low skill levels, localised deprivation and weak performance in knowledge based industries represent future threats.
- 3.26 Table 3.2 summarises Wyre’s particular strengths, weaknesses, opportunities and threats. Many of these issues will have a significant bearing on the Borough’s future employment land requirement.

Table 3.2 SWOT Analysis

Strengths	Weaknesses
<ul style="list-style-type: none"> - The local business base has experienced continued (albeit modest) growth throughout the economic downturn - Business deaths remain below the regional and national average - The Borough has consistently low levels of unemployment - Advanced manufacturing, chemicals, energy & environmental technology and food processing are strong performing sectors in Wyre with opportunities to grow - The Borough is home to the Fleetwood Nautical campus, one of the top nautical establishments in the country - Regional Programmes are helping business start-ups, although due to funding cutbacks these have been substantially reduced in number 	<p>are generally inadequate for many businesses</p>

Opportunities

Threats

requirements

- Continued economic downturn and the decline of traditional manufacturing employment
- Potential de-trunking of the A585 following the cessation of Stena Ferry services to/from Fleetwood
- DWP will relocate approximately 1,200 staff from its Norcross office to sites in Fylde and Blackpool
- Other public sector closures/relocations planned for the area could result in a total of 5,500 job losses by 2016 and a loss of c£250 million GVA
- Further reduction in public spending could undermine growth in some sectors
- The fish-processing park at Fleetwood Docks is now reliant upon land-based imports of fish with the only real draw to Fleetwood being its historic linkages – an increasingly footloose industry that could relocate
- An ageing population
- Competition for inward and domestic investment from neighbouring economic centres, particularly Blackpool, Preston and beyond (especially following the electrification of the Preston-Blackpool line)

4.0 The Wyre Commercial Property Market

Introduction

- 4.1 This section describes current property market conditions in Wyre Borough and the general area around it, with a particular focus on the Fylde Coast Sub-Region. This includes recent trends in demand for and the supply of industrial and office premises and the factors affecting these. The analysis is based on data collated by the Valuation Office Agency (VOA) and Storeys Edward Symmons' local market knowledge, supplemented by discussions with local property agents and various economic development and business organisations active in the area.
- 4.2 The VOA prepares a comprehensive and current list of commercial premises for rating purposes. Summary data from the VOA is published by the government from time to time and is useful for broad-brush analysis of so called bulk use classes. Storeys Edward Symmons also subscribes to Analyse software which uses the disaggregated VOA data to enable more detailed analysis of the latest data. Both are used in our analysis below, but due to different sources, dates and collation conventions, some discrepancies between the datasets can arise.

Overview

- 4.3 Because of its peripheral location and its relatively poor transport links the Fylde Coast's commercial property markets are relatively isolated from wider regional trends. The area has thus largely avoided the booms and busts seen elsewhere in the region.
- 4.4 Demand for both sites and premises is relatively weak and most enquiries are generated by existing Wyre businesses. New development is driven by local businesses requiring bespoke premises with freehold properties being favoured.
- 4.5 Wyre is perceived as a reasonable location for businesses requiring industrial premises. Poulton Industrial Estate is considered the most successful employment location in the Borough and has a sub-regional role, as does the former ICI Hillhouse Secure site to the north of Thornton, which accommodates a range of businesses including a number of international-class manufacturing companies. Thornton's Redmarsh Industrial Estate, Fleetwood's Copse Road and Garstang's Green Lane West, are local industrial estates principally serving the towns themselves rather than the wider sub-region. Brockholes Way at Catterall has direct access to the A6 and of all the Borough's industrial estates is closest to the M6; as a result it is attractive to businesses from a wider catchment area. The Council's call for sites exercise has led to a cluster of sites being identified within the A6 corridor (see Section 10.0) suggesting that the market considers that there is potential for future growth in this location.

- 4.6 Blackpool is the prime office location within the Fylde Coast. By contrast, there is no recognised office centre within Wyre Borough and demand is relatively weak. Recent office development has occurred on Poulton Industrial Estate, but elsewhere the stock is generally dated and of low specification.

The Stock of Employment Premises in the Sub-Region

- 4.7 The number of industrial and office premises in each of the Fylde Coast local authority areas is summarised in Table 4.1. Wyre has fewer offices than either Blackpool or Fylde, and whilst Wyre has slightly more warehouses than Blackpool it has fewer factories. Fylde has a substantially smaller stock of factories and warehouses than either Blackpool or Wyre.

Table 4.1 Number of Employment Premises

Borough	Factories	Warehouses	Offices	Total
				1,288
Blackpool	572	469	736	1,777
Fylde	373	247	466	1,086

Source: Commercial and Industrial Floorspace and Rateable Value Statistics (2005 Revaluation), April 2008, from Neighbourhood Statistics website

- 4.8 Table 4.2 summarises the total stock of employment floorspace within the three Fylde Coast authorities. In line with the low number of units, office floorspace in Wyre is relatively low compared to the other two authorities. Despite Wyre having more warehouse units than Blackpool, the floorspace size is lower; the average unit size in Wyre is 337 sq m, whereas in Blackpool it is more than twice as large at 704 sq m.

Table 4.2 B-Class Employment Floorspace (sq m)

Borough	Factories	Warehouses	Offices	Total
Wyre	371,000	160,000	122,000	653,000
Blackpool	304,000	330,000	207,000	904,000
Fylde	200,000	101,000	169,000	470,000

Source: Commercial and Industrial Floorspace and Rateable Value Statistics (2005 Revaluation), April 2008, from Neighbourhood Statistics website

- 4.9 Table 4.3 compares changes in the stock of floorspace between 1998 and 2008. Whilst factory floorspace has remained more or less unchanged in Blackpool and Wyre, it has halved in Fylde. Warehouse floorspace has increased in each local authority area, but the largest growth has been in office floorspace which in Wyre and Fylde has more than doubled and in Blackpool has increased by 64%.
- 4.10 The changes in floorspace reflect both the sustained economic growth during this period and the shift away from manufacturing towards service sector

employment. Whilst the latter is expected to continue, the economy now has relatively low growth prospects.

Table 4.3 Changes in Employment Floorspace, 1998 - 2008

Borough	Factories		Warehouses		Offices	
	Floorspace (sq m) 1998	Growth 1998 2008	Floorspace (sq m) 1998	Growth 1998 2008	Floorspace (sq m) 1998	Growth 1998 2008
						+ 114%
Blackpool	322,000	- 6%	279,000	+ 18%	126,000	+ 64%
Fylde	397,000	50%	77,000	+ 31%	82,000	+ 106%

Source: Commercial and Industrial Floorspace and Rateable Value Statistics April 1998, from Neighbourhood Statistics website

4.11

Table 4.4 compares the age of premises as of 2004 (the VOA has not carried out a more recent analysis). At this time, 50% of the office units in Wyre were pre-1940, whilst around 60% of factories and warehouses were built before 1970. Nevertheless, the age profile of employment premises in Wyre compares favourably with that of Blackpool, and in absolute terms marginally more units were built between 1991 and 2003 in Wyre than in the other two Boroughs. In Fylde, the proportion of premises built since 1991 is higher than in Wyre and Blackpool for each use class.

Table 4.4 Number of hereditaments by Local Authority, age and bulk class

	Unknown Age	Pre 1940	1940 70	1971 80	1981 90	1991 2000	2001 03	All ages
Wyre								
Warehouse	8	143	70	60	46	19	7	353
Blackpool								
Warehouse	4	243	114	24	30	19	5	439
Office	15	416	75	19	24	39	8	596
Fylde								
Warehouse	4	112	44	22	44	11	3	240
Office	4	268	65	4	14	18	27	400

Source: Age of Commercial and Industrial Stock Local Authority Level 2004, Communities and Local Government, 2005

The Market for Industrial Premises in Wyre

Stock

4.12 Using Analyse software we have assessed in greater detail employment premises in Wyre Borough. The VOA data distinguishes between various types of industrial premises, and these VOA descriptions and use codes are included for reference. To a large extent however the market does not make such distinctions. Buildings will typically accommodate a range of uses and what was originally intended for one use may subsequently be used for another with or without adaptation works. Even broad groupings such as factories and warehouses are frequently indistinguishable. Within Wyre there are too few purpose built high-bay warehouses with multiple loading bays to allow meaningful analysis.

4.13 The VOA identifies 1,214 industrial units in the Borough of Wyre (as opposed to all office/industrial units as outlined in Table 4.1). These are predominantly situated on industrial estates or within other established industrial areas, though in more rural parts of the Borough there are isolated buildings. Table 4.5 categorises these by type. Premises defined as land used for storage, haulage and storage depots are also included within this analysis.

Table 4.5 Stock of Industrial Premises

Description	PSD Code	Number of Hereditaments
Vehicle Repair Workshop		
Garage & Premises		
Road Haulage Depot		
Warehouse & Premises		
	CW1	56
Storage Depot & Premises		
Store & Premises		
Factory & Premises		
Workshop & Premises		
Other Industrial		
Total		1,214

Source: Analyse / VOA 2012

4.14 The descriptions and categorisations used by the VOA suggests that around 37% of industrial units are used for some form of storage (CW, CW1, CW2 & CW3). These will range from lock-ups and areas of land to purpose built

logistics warehouses. Another 60% of units are described as factories or workshops.

- 4.15 Table 4.6 categorises industrial premises by size. For this analysis we have excluded those use classes that would predominantly provide external storage (CG4, CW1 & CW2) to ensure that the analysis is not distorted by the inclusion of large areas of land.

Table 4.6 Size of Industrial Premises

Description	Size (sq m)								Total
	< 50	50 - 100	100 - 250	250 - 500	500 - 1000	1000 - 2000	2000 - 5000	> 5000	
Vehicle Repair Workshop									
Garage & Premises									
Warehouse & Premises									
Store & Premises									
	0	0	8	12	8	3	18	6	55
Workshop & Premises									
Other Industrial									
Total									

Source: Analyse / VOA

- 4.16 Small units are an important component of supply; 26% of units are less than 100 sq m (1,076 sq ft) and a further 37% are between 100 and 250 sq m. Only 8% of units are more than 1,000 sq m in size, evidence that the market is dominated by smaller, local businesses.

Availability

- 4.17 Data on currently available premises has been sourced from FOCUS, which provides national coverage and is compiled from data provided by agents and through the company's own research. We would caution that national property databases such as FOCUS can overlook units being marketed by agents with only a local presence or by private individuals. In the course of our inspections we noted other premises on the market which are not listed on FOCUS (notably seven units on Poulton Industrial Estate that are being marketed by S.J.Gartside).
- 4.18 FOCUS records 90 available units totalling 28,005 sq m. On this basis the overall vacancy rate equates to 7.6%. In our experience of other property markets this level of vacancies is low having regard to prevailing economic

circumstances. The inclusion of the seven Gartside units alone increases the vacancy rate to 8.2%.

- 4.19 Table 4.7 compares the stock and availability of units across different size bands. This identifies that oversupply is most concentrated amongst units of 250 – 1,000 sq m. Very small units are most likely to be let on easy-in / easy-out terms and thus void rates tend to be higher. However the void rate of more over 14% amongst units of less than 50 sq m represents oversupply as this is significantly above the 10% level usually understood to represent equilibrium in the market.

Table 4.7 Vacancy Rates of Industrial Premises by Size

	Size (sq m)							Total	
	< 50	50 100	100 250	250 500	500 1000	1000 2000	2000 5000		> 5000
Stock of Units									
Vacant Units									
Vacancy Rate (%)	14.4	4.7	6.8	10.9	10.6	7.4	2.9		8.2

Source: Analyse / FOCUS / Storeys Edward Symmons

Demand

- 4.20 The Council collates premises enquiries from a variety of sources including e-mails, the Council's website, Blackpool Unlimited and Make It Lancashire. These enquiries span the period November 2007 to July 2012, a period of 4 years and 9 months. 71 enquiries were received for industrial premises; an average of 15 per annum. The enquiries recorded by the Council are likely to represent just a fraction of demand. Other businesses will carry out their own searches and contact agents directly. Thus comparing enquiry levels with available premises is an unreliable indicator of the strength of the market.
- 4.21 Enquiries recorded by the Council do not generally specify a particular location. 53% of enquiries would consider premises throughout the Fylde Coast (Blackpool, Fylde and Wyre), which is evidence of the market's perception of the Fylde Coast as a single economic area. A further 30% specified Wyre or Blackpool, and just 15% specified Wyre alone.
- 4.22 Some 40 of the 71 enquiries recorded do not specify the size of requirement. The table below categorises the remaining 31 enquiries into broad size bands. A majority of requirements (68%) are for premises of less than 5,000 sq ft (465 sq m), which underlines the importance of small units to the market in Wyre.

Table 4.8 Enquiries for Industrial Premises, by Size

	< 2,000 sq ft	2,000 - 5,000 sq ft	5,000 - 10,000 sq ft	10,000 - 20,000 sq ft	>20,000 sq ft	Total
	12	9	7	3	0	31
Proportion of Enquiries (%)	39%	29%	22%	10%	0%	100%

Source: Analyse / FOCUS / Storeys Edward Symmons

Values and Viability

4.23 The VOA estimates rental tones for the purpose of calculating business rate liability. The 2010 rating revaluation uses a base date of April 2008. The average rent in Wyre equates to around £32 per sq m (£3 per sq ft). Asking rents for properties currently on the market range from £18.50 to £72.30 per sq m (£1.72 - £6.72 per sq ft) and will depend upon the specification, size and location of the unit.

4.24 The viability of industrial development is dependent on a range of factors including:

- the availability and cost of finance;
- abnormal costs of site preparation;
- abnormal infrastructure costs;
- void periods;
- construction costs;
- rental levels;
- yields;
- ability to secure pre-lets or forward sales;
- availability of and eligibility for gap funding.

In current market conditions speculative industrial development by the private sector is almost impossible; but as and when economic conditions improve and more 'normal' market circumstances return, then rents of around £54 per sq m (£5 per sq ft) would need to be achievable to allow private sector speculative development on serviced sites with low abnormal costs. Until then, development will be restricted to bespoke premises for specific businesses.

The Market for Office Premises in Wyre

Stock

- 4.25 The VOA identifies 425 office units in the Borough of Wyre, totalling 114,000 sq m (1.23 million sq ft). These are categorised by location in Table 4.9. Some 69% of the office units are situated in the urbanised western part of the Borough; 17% in the A6 corridor (Garstang & Catterall); and the remaining 14% scattered across the rural area. When assessed by floorspace 88% is in the urban west, 8% in the A6 corridor and 3% in the rural area. 46% of all office floorspace is within Cleveleys. This high proportion is mainly attributable to the Norcross complex, where the VOA identifies 39,881 sq m of offices and an 8,406 sq m computer centre, which together amount to 42% of the Borough's office floorspace.

Table 4.9 Location of Office Premises

Description	Floorspace (sq m)	Office Units
Cleveleys	53,139.41	50
Thornton	7,405.20	58
Poulton le Fylde	17,229.90	87
Fleetwood	22,762.34	99
Rural West	1,343.86	20
Central Rural Plain	3,045.77	40
Garstang & Catterall	9,407.51	71
Total	114,333.99	425

Source: Analyse / VOA 2012

- 4.26 Table 4.10 categorises office units by size. Small units are an important component of supply; 64% of units are of less than 100 sq m (1,076 sq ft) and a further 23% are between 100 & 250 sq m. Only 12% of units are more than 250 sq m in size, evidence that the market is dominated by smaller, local businesses. The largest offices are typically occupied by public sector organisations including the NHS at Hesketh House, Fleetwood and Wyre Civic Centre in Poulton.

Table 4.10 Size of Office Premises

Description	Size (sq m)							Total	
	< 50	50 100	100 250	250 500	500 1000	1000 2000	2000 5000		> 5000
Cleveleys									
Thornton									
	34	27	12	9	2	2	1	0	87
Fleetwood									
Rural West									
Central Rural Plain									
Garstang & Catterall									
Total									

Source: Analyse / VOA 2012

Availability

- 4.27 Data on currently available premises has been sourced from FOCUS, which provides national coverage and is compiled from data provided by agents and through the company’s own research. As before, we would caution that national property databases such as FOCUS can overlook units being marketed by agents with only a local presence or by private individuals.
- 4.28 FOCUS records 31 available units totalling 3,426 sq m. On this basis, the overall vacancy rate equates to 7.3%. In our experience of other property markets this level of vacancies is low having regard to prevailing economic circumstances. When measured by floorspace available stock represents just 3% of total office floorspace, but as noted above the floorspace figures are distorted by the disproportionate scale of the Norcross complex which is earmarked for closure in summer 2013 and which would dramatically impact upon vacancy rates.
- 4.29 Table 4.11 compares the stock and availability of units across different size bands. This identifies that vacant units are concentrated amongst units of 100 – 250 sq m. Very small units are most likely to be let on easy-in / easy-out terms. Thus a void rate of less than 10% amongst units of less than 50 sq m does not represent oversupply.

Table 4.11 Vacancy Rates of Office Premises by Size

	Size (sq m)								Total
	< 50	50 100	100 250	250 500	500 1000	1000 2000	2000 5000	> 5000	
Stock of Units									
Vacant Units									
Vacancy Rate (%)	8.6	3.4	8.9	6.5	7.7				7.3

Source: Analyse / FOCUS / Storeys Edward Symmons 2012

Demand

- 4.30 WBC collates premises enquiries from a variety of sources including e-mails, the Council's website, Blackpool Unlimited and Make It Lancashire. These enquiries span the period November 2007 to July 2012, a period of 4 years and 9 months. Thirty enquiries were received for office premises; an average of six per annum. Again, the enquiries recorded by the Council are likely to represent just a fraction of demand.
- 4.31 Enquiries recorded by WBC do not generally specify a particular location. Two-thirds of enquiries would consider premises throughout the Fylde Coast (Blackpool, Fylde and Wyre). A further 23% specified Wyre or Blackpool, and just 10% specified Wyre alone.
- 4.32 Only eleven of the thirty enquiries recorded specify the size of requirement. The majority of requirements are for premises of less than 1,000 sq ft (93 sq m), which underlines the importance of small units to the market in Wyre.

Values and Viability

- 4.33 The VOA estimates rental tones for the purpose of calculating business rate liability. The 2010 rating revaluation uses a base date of April 2008. The average rent in Wyre equates to around £70 per sq m (£6.50 per sq ft). Asking rents for properties currently on the market range from £46 to £146.50 per sq m (£4.30 - £13.60 psf) and will depend upon the specification, size and location of the unit.
- 4.34 The viability of industrial development is dependent on a wide range of factors (see paragraph 4.24). In current market conditions, speculative office development by the private sector is almost impossible; but as and when economic conditions improve and more 'normal' market circumstances return then rents of around £140 per sq m (£13 per sq ft) would need to be achievable to allow private sector speculative development on serviced sites with low abnormal costs. Until then development will be restricted to bespoke premises for specific businesses.

Summary

4.35

In summary:

- Wyre Borough's relative isolation has seen the area generally avoid the extremes of boom and bust seen elsewhere in the region. However, this also ensures that demand for both sites and premises remains relatively weak, and driven primarily by indigenous businesses;
- Whilst Poulton Industrial Estate is considered the most successful employment location in the Borough and has a sub-regional role; however, recent developer enquiries and the call for sites exercise suggests pent up demand for future economic growth in the A6 Corridor;
- There is no recognised office sector within Wyre and demand is relatively weak. Recent development on Poulton Industrial Estate aside, the office stock is generally dated and of a low specification. That said, office floorspace has more than doubled since 1998 in Wyre, albeit from a relatively low base;
- Vacancy rates for industrial space in Wyre are low at 8.2%, particularly considering prevailing economic circumstances. Void rates are significantly higher for very small units of less than 50 sqm. Asking rents for industrial properties are also low, averaging around £32 per sqm;
- Office vacancy rates are also modest at around 7.3%, although the forthcoming DWP relocation from Norcross would significantly increase the availability of commercial stock in the Borough. Average rents for office space in Wyre are reasonable, at around £70 per sqm, although this is around half the level required to enable private sector speculative development on serviced sites with low abnormal costs.

5.0

Stakeholder Consultation

Introduction

5.1

Stakeholder consultation has formed an essential part of the ELCLS process, to ensure that land projections and allocations meet the needs and aspirations of Wyre. Alongside the 2012 Call for Sites exercise undertaken by WBC (which has informed the site selection process), the stakeholder engagement and consultation undertaken comprises:

- 1 Face-to-face meetings and telephone discussions with 17 key stakeholders. This included relevant business stakeholders within key sectors; local agents who have a thorough knowledge of Wyre's economic development and commercial leisure property markets; Fylde Borough Council; Blackpool Bay Area Company; and the Lancashire Local Enterprise Partnership. We also liaised with both Fylde and Blackpool Borough Councils regarding their own requirements to ensure that Wyre's ELR is not considered in isolation;
- 2 A leisure questionnaire, which was sent out to 100 local commercial leisure operators within the Borough and the wider area to elicit property and land requirements.

5.2

A summary of this consultation process is presented below.

Stakeholder Interviews

5.3

Consultations were held with a range of key stakeholders to help inform the development of the employment land review. NLP/SES attended face to face meetings with representatives from, and undertook telephone discussions with, a range of organisations including WBC, Lancashire County Council, NPL Estates and the Association of British Ports. A full list is provided in Appendix 1.

5.4

These consultations were used to discuss the current and future role of Wyre within the regional and sub-regional economy and the existing opportunities and constraints of the local authority as a business location.

Summary Findings

5.5

The key findings and main issues raised include the following:

- a Whilst historically in decline, traditional manufacturing industries are likely to continue to play a key role in Wyre's economic future, although there is a need to provide more good quality premises that have excellent transport links to ensure they prosper.
- b Blackpool Council has indicated that they expect to have a shortfall of employment land provision of circa 15ha over the Local Plan period 2012-2027. Initial discussions with Blackpool Council suggest that available

- employment sites in Wyre are unlikely to be appropriate in locational terms and in meeting Blackpool's employment demand.
- c Blackpool Council has indicated that the demand for new employment land in Blackpool is likely to be focused around the airport and in the South Blackpool area close to Junction 4 of M55 including land located within Fylde. Further discussions will be undertaken with Fylde and Blackpool Councils to agree how any unmet demand in Blackpool will be met across the Fylde coast sub-region and to feed into the preparation of a sub-regional employment land position statement.
 - d Development pressures have been particularly strong in Fylde Borough despite the recession and on-going economic pressures. Take up in this area has remained relatively constant, but there has been continued pressure for residential development on allocated/existing employment sites, with a number having been lost to non-B class uses in recent years.
 - e The M55 site at Peel Park is crucial for Fylde and Blackpool (which immediately adjoins the site). The future expansion of this site is a key issue that the Fylde ELR has considered and one that will dictate whether Wyre needs to make additional provision to meet Blackpool's needs.
 - f There needs to be a focus upon meeting the needs of the rural areas and not just the urban coastal area, embracing opportunities to encourage and support local businesses. The role of superfast broadband in helping to facilitate rural diversification will be crucial in the eastern parts of Wyre.
 - g There is a recognised lack of a highly skilled workforce. There are opportunities to enhance skill levels but there has been relatively limited take up.
 - h Ongoing public sector cuts, notably the ongoing relocation of the 1,200 DWP workforce at Norcross over the coming months, presents a significant challenge to Wyre, which is heavily reliant on the sector (with the public sector comprising around 40% of all jobs in the area). Other relocations are likely to include the Land Registry, the NHS, and Burseries and Pensions departments. In total, it has been estimated that Wyre Borough could lose around 5,500 jobs, or around £280 million GVA annually between 2011 and 2016, which would represent a huge loss to the local economy.
 - i Once the country emerges from the protracted economic downturn, it is likely that businesses specialising in advanced manufacturing are likely to see some growth which will need to be accommodated.
 - j Wyre provides a more affordable location for businesses than Fylde and this potential should be maximised to promote it as an alternative business location.
 - k The future of the M55 link road has a key role to play in unlocking the Hillhouse strategic site in Wyre.

- l The Port at Fleetwood now has a greatly reduced strategic role following the cessation of Stena Line services – it is no longer a RoRo port. Whilst the docks remains an important fish processing centre based around the existing fish auction, around 90% of the fish comes in by road rather than trawlers. As such, there is a risk that the existing companies could relocate to more accessible locations, with better quality facilities.
- m In general, the leisure facilities in Wyre were considered fit for purpose, particularly in Cleveleys. There is much less in Fleetwood, with no budget hotels despite the internationally renowned nautical campus. Stakeholders commented that there was a general lack of good quality eateries in the Borough, with an emphasis on small family businesses and very few quality restaurant chains.
- n Funding opportunities for economic development schemes in Wyre are very limited, as it is not an assisted area. State aid rules prohibit many schemes, and whilst Lancashire is eligible for ERDF funding, the requirement for 50% match funding on grants prohibits most large infrastructure schemes in the Borough at present.
- o It was considered that there were opportunities for enhancing the existing tourism offer by linking the coastal offer with the rural tourism presented by the attractive Trough of Bowland area.
- p The main leisure enquiry received by WBC Officers recently related to Golf Football – a game popular on the continent that could require the conversion of putting greens.
- q There remains a relatively high demand for rural offices and particularly industrial sites, with Garstang being the location of choice. However, the quality of many of the existing rural employment sites is generally poor. Several stakeholders commented that it was essential that new sites are provided within the rural A6 corridor to retain important manufacturing businesses and to help them expand.
- r Shale Gas fracking represents a real opportunity for economic growth in the Fylde Coast sub-region. Whilst it is a controversial subject at present due to environmental considerations, it is understood that Quadrilla envisage the potential for around 80 drill sites of 1 acre each, of which perhaps 15-20 could be located in Wyre Borough. Each drill site could contain around 10 wells, which could begin in around 3-4 years time and remain operational for around 30 years.
- s The fracking sites would not necessarily require a significant amount of new infrastructure, primarily water and drainage issues, with comparatively limited energy consumption.
- t Fracking could bring significant supply chain benefits to the area, particularly through servicing the wells, and there is the potential for the area to become a trailblazer for the technology, becoming a ‘mini-Aberdeen’, that could develop a highly specialised knowledge base. There remain significant planning and political pressures to be overcome before this potential can be realised.

- u Offshore energy represents another opportunity for the sub-region. There are plans for between 2,000-3,000 new turbines for the Irish Sea that could all be serviced from this part of the Fylde Coast. Operational and maintenance jobs equate to around 330 staff per 100 turbines, hence there is the potential for substantial levels of job creation in the area (as it is understood that comparable ports at Barrow, Heyshem and Maryport are all operating at capacity). If that investment proceeds, this could be a sustainable source of job creation, particularly in the Fleetwood area to the north of the Borough, where the servicing companies could be based.
- v Other growth opportunities in the area include Biomass anaerobic digesters – one is currently operational in Wyre, with another planned to follow at the Hillhouse International site.
- w Notwithstanding this, there needs to remain a focus upon meeting the needs of the rural areas and not just the urban core, including by embracing opportunities to encourage and support local businesses.

Leisure Questionnaire

- 5.6 A Leisure Questionnaire, sent out to 100 commercial leisure businesses in July 2012, aimed at assessing the future growth and floorspace requirements of leisure businesses currently located in Wyre. Whilst the response rate was too low to draw substantive conclusions regarding the quantitative demand for additional leisure sites in the Borough, the broad findings of this research are considered in further detail in Section 11.0.

6.0 The Current Stock of Employment Floorspace

Introduction

6.1 This section provides an overview of the current stock of employment space in the Borough, as well as recent trends in and changes to supply. The future pipeline of development in Wyre and historic losses of employment land to alternate uses are also examined.

6.2 The analysis contained within this section draws upon the following data sources:-

- Commercial floorspace data from the Valuation Office Agency (VOA);
- Wyre Council's monitoring data on employment development; and
- Commercial property databases including FOCUS and the websites of agents active in the local area.

Main Employment Areas

6.3 The main existing employment areas within Wyre are:-

- Fleetwood –Thornton, where seven sites are allocated for employment development as part of the Fleetwood Thornton Area Action Plan. Together these sites total 112.57 ha and include Hillhouse Secure Site (59.5 ha), Burn Hall Industrial Estate and Lancashire Waste Technology Park (26.1 ha);
- Garstang and Catterall, which are important for business and services in the rural hinterland and provide a key role in serving the economic needs of the eastern part of the Borough;
- Poulton Industrial Estate, located on the eastern side of Poulton-le-Fylde on the A586 (a key strategic transport corridor). The majority of the estate has been developed, demonstrating its successful location for business use. The Wyre Employment Land Review (2008) indicated that demand was high from businesses for new premises, illustrating the importance of the estate for employment purposes; and,
- Two allocated Greenfield sites at Lancaster Old Road, Cloughton.

Emerging Supply of Employment Floorspace

6.4 An analysis of Wyre's development pipeline can help to understand the projected future supply of employment space. The study has analysed data provided by WBC detailing applications received by Development Control and separated this out for industrial and office proposals.

6.5 Excluding extensions and changes of use, there are five planning permissions for new industrial development, equating to 0.77 ha. There are also four extant permissions for new office development, equating to 0.62 ha and four planning

permissions for mixed office & industrial development, equating to 0.41 ha. Together these permissions have the potential to provide 1.80 ha of additional employment floorspace.

Development Rates

- 6.6 WBC collates data on the development of employment land for Annual Monitoring purposes. Take-up of allocated sites for employment development is held from 2001/02 onwards. However, data relating the take-up of unallocated sites for employment purposes is only available from 2007/08 onwards.
- 6.7 As Table 6.1 illustrates, take-up of allocated employment sites over the period 2003/04 to 2006/07 totalled 9.65 hectares. Take-up of allocated and non-allocated sites for employment purposes over the period 2007/08 to 2011/12 totalled **22.81 ha**. Over an 11-year period 2001-12, total employment land take-up was **36.51 ha**. This equates to a gross average annual take-up of **3.32ha per annum**.
- 6.8 The table shows significant fluctuations in the level of gross take-up over time, with annual figures ranging from 0.32ha in 2002/03 to 15.55ha in 2010/11, although this figure appears unusually high for Wyre and is almost entirely due to the development of the 13.3ha Lancashire Waste Technology Park.

Table 6.1 Gross Employment Land Completions

Year	Unallocated Sites (ha) *	Allocated Employment Sites (ha)	Total Take up (ha)
2006/07	Not known	2.08	2.08
TOTAL	3.99	20.41	36.51

Source: Wyre Borough Council

* Note – floorspace figures only available from WBC. Land totals calculated on the basis of applying a 40% plot ratio.

Losses of Employment Land

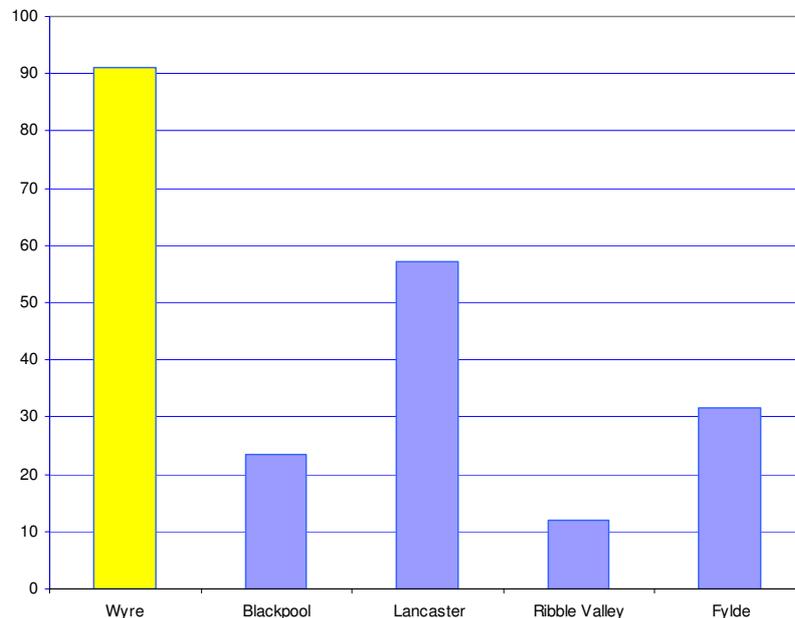
6.9 It should be noted that WBC has not historically monitored the loss of employment space to alternative uses. However, data has been provided by WBC in respect of three planning permissions relating to the change of use of employment land to alternative uses. These are thought to have been implemented between 2002 and 2012 and amount to a total loss of 3.24ha.

Available Employment Land

6.10 Wyre’s Annual Monitoring Report (2010/11) indicates that the Borough has an estimated **91 ha of available employment land**. This figure is based upon the remaining allocated employment sites available for take-up identified within the adopted Wyre Borough Local Plan (10.35ha), the Fleetwood Thornton AAP (75.94ha), the Wyre 1st Deposit Draft (2.7ha) and sites with extant planning permissions (1.86ha).

6.11 Figure 6.1 illustrates how the availability of employment land in Wyre compares with that of adjoining local authorities (for the monitoring year 2010/11). This indicates that Wyre substantially more available employment land than the adjoining four authorities and approximately triple the amount of land compared to Blackpool, Fylde and Ribble Valley.

Figure 6.1 Total Employment Land (ha) Available



Source: Annual Monitoring Reports, Various, 2010/11

Employment Space in Adjoining Areas

6.12 It is also important to understand the extent and types of available employment in neighbouring authorities, as well as any major new economic development coming forward that could impact on the Council’s employment land portfolio.

- 6.13 We provide a brief synopsis of the employment land position of four local authorities that border Wyre Council. We have excluded Preston City Council from this review on the basis that they are part of a strategic partnership with Chorley and South Ribble local authorities, which together represent Central Lancashire.
- 6.14 **Blackpool:** The Council produced an Employment Land Technical Paper in May 2012 as part of their Core Strategy Evidence Base. The Paper found that there are 13 main industrial/business locations within Blackpool which are established business areas and safeguarded for employment use. These locations amount to 185ha of land in total, 23.5ha of which is undeveloped and remains available for employment development. A review of employment land take up in Blackpool suggests that between 2001-10, total take up was 19.8ha, at an annual rate of 2.2ha per annum. Projecting this higher figure forward over the 15 year plan period and providing a 20% flexibility factor suggests a future requirement of 35-40ha of additional employment land to meet Blackpool's needs.
- 6.15 The Paper notes that Blackpool's limited development land is a significant constraint to meeting future needs within its own boundary. This highlights the importance of continued co-operation between the three Fylde authorities to support Blackpool's economic growth. Co-operation regarding the extent of lands promoted for employment development in Fylde around Junction 4 of the M55 (including Whitehills and Whyndyke) and Blackpool airport will be particularly important. Their location on the edge of Blackpool means that future development of these lands would essentially be a sustainable extension of the Blackpool urban area.
- 6.16 In contrast, whilst Wyre also contains key sites of sub-regional significance including Hillhouse, Blackpool Council considers that land on the edge of Blackpool in Fylde is more accessible to the majority of Blackpool residents and have a more specific role to play in complementing and supporting Blackpool's economic growth as opposed to lands in Wyre. The Paper concludes that if Blackpool and the two neighbouring authorities do not embrace this approach, then the reality is that Blackpool would have around a 15ha shortfall which could potentially undermine economic growth.
- 6.17 **Fylde:** An Employment Land and Premises Study was produced on behalf of Fylde Borough Council in August 2012. The report will inform the Council's Local Plan and analyse employment land demand, supply and need to 2030. The ELPS reports that the manufacturing sector employs the highest proportion of people in Fylde, with much of this accounted for by employment at BAE Systems. Around 75ha of the BAE Systems site at Warton is now an Enterprise Zone [EZ], along with its sister facility at Salmesbury. The EZ proposal is to develop around 15,000 sqm of new B1 and B2 premises at Warton by 2015 (creating 500 new jobs). The ELPS recognises that the adjoining authority of Blackpool has a shortage of employment land and lacks the available space to provide new employment allocations within its boundaries. In Fylde there are existing employment areas which can meet some of this need, notably

Whitehills Park. However, Blackpool must also look to Wyre, which has a far larger existing supply of employment land than Fylde.

- 6.18 The Borough currently has a headline supply of 22.32ha of available employment land across 24 sites. Almost half of this land is at Whitehills Park and Blackpool and Fylde Industrial Estate. Due to constraints, the worst case scenario is that the supply could reduce to just 15.23ha across 16 sites. Based on a variety of modelling techniques including econometric forecasting and projecting forward past take up rates, the report concludes that Fylde Council should allocate a further 26-33ha of employment land for the period 2012-30 (in addition to the current 22.32ha supply).
- 6.19 The ELPS is clear that this additional provision does not include meeting demand that might be generated by the increasingly constrained development position in Blackpool. However, Fylde's role as an economic and employment centre serving the wider Fylde coast area needs to be recognised. Areas of search for new supply should initially concentrate upon the west of the Borough (capitalising on Junction 4, M55 and Blackpool Airport) and around Kirkham. There is also a need to provide locations for new office sector activity, particularly in the urban areas of Lytham and St Annes.
- 6.20 **Lancaster:** A Partial Employment Land Review was prepared by Atkins in October 2008 for the purposes of informing the identification of employment sites in the Council's Land Allocations DPD. This recognises that Lancaster is largely a local market for offices and industrial property. The majority of demand for industrial floorspace is from local companies looking to upgrade their premises, downsize or move to larger accommodation. There appears to be a strong market for freehold accommodation but a lack of available sites. The University is perceived as a major positive factor in attracting employment to the City, although general prospects for attracting any inward investment appear very limited. The Port of Heysham seems to have significant potential for expansion but the construction of new link to the M6 is essential to maximise this potential. This expansion, however, is unlikely to lead to any new demand for land or premises.
- 6.21 An analysis of requirements over the period to 2016 identifies a future requirement of between 169 and 195 ha of employment land. Set against a supply of 383 ha of employment land, it is clear that the Council has no quantitative need for additional allocations. However, the Review notes that much of the existing stock is in relatively unsustainable locations and there are relatively few immediately available high quality sites. Accordingly, the Review recommended that: (i) the best employment sites be strongly protected, (ii) the redevelopment, intensification and improvement of existing employment areas be encouraged, and (iii) no further land be allocated for employment purposes over and above that already allocated.
- 6.22 **Ribble Valley:** The Ribble Valley Employment Land and Retail Study was prepared by the BE Group in 2008. This focuses on B1, B2 & B8 uses, examined the supply and demand position and made estimates of future need. This Study has updated in June 2011 by an Employment Land Position

Statement for the purposes of guiding future allocations of land and considering the use of current employment sites, given the relatively high demand for housing in the Borough.

6.23

The Employment Land Position Statement recommended that an additional 6 ha of employment land should be identified in order to facilitate and maintain levels of economic development over the period 2010 – 2020. This should be primarily located adjacent to the A59 and, where possible, to extend and add value to existing employment areas and be accessible to key service centres. Due to the limited availability of developable employment land, it also identified a need to restrain the loss of existing employment areas and premises to other uses.

Conclusions

- Wyre Borough has around 91ha of employment land that is considered to be 'available'. Of this supply, the vast majority is in the Fleetwood/Thornton sub-area, with the Hillhouse Secure Site comprising around 46ha on its own;
- The amount of land available in Wyre is considerably above the amount available in adjoining Districts, and is greater than the cumulative supply for Blackpool, Ribble Valley and Fylde. Blackpool faces considerable physical constraints in meeting its land requirements, and requires around 15ha to be provided in the adjoining districts of either Fylde or Wyre. A sub-regional position statement will be prepared by the authorities to address this issue;
- Fylde's ELPS identified a requirement for a further 26-33ha of employment land to meet its own needs without taking into account Blackpool's additional requirement, although the report recognises that there are existing employment areas in Fylde which can meet some of this need, notably Whitehills Park. However, the ELPS states that Blackpool must also look to Wyre, which has a far larger existing supply of employment land than Fylde;
- The Borough has seen relatively low levels of take up of employment land in recent years, averaging some 3.32 ha since 2001/02. However, much of this take up has been due to a one off recent development at the Lancashire Waste Technology Park in 2010/11; if this is excluded, the average annual rate of development drops to just 2.11ha;
- Losses of employment land have not been monitored by WBC; however, three recent planning permissions for change of use from B-class employment land totalled 3.24ha, implemented between 2002 and 2012;

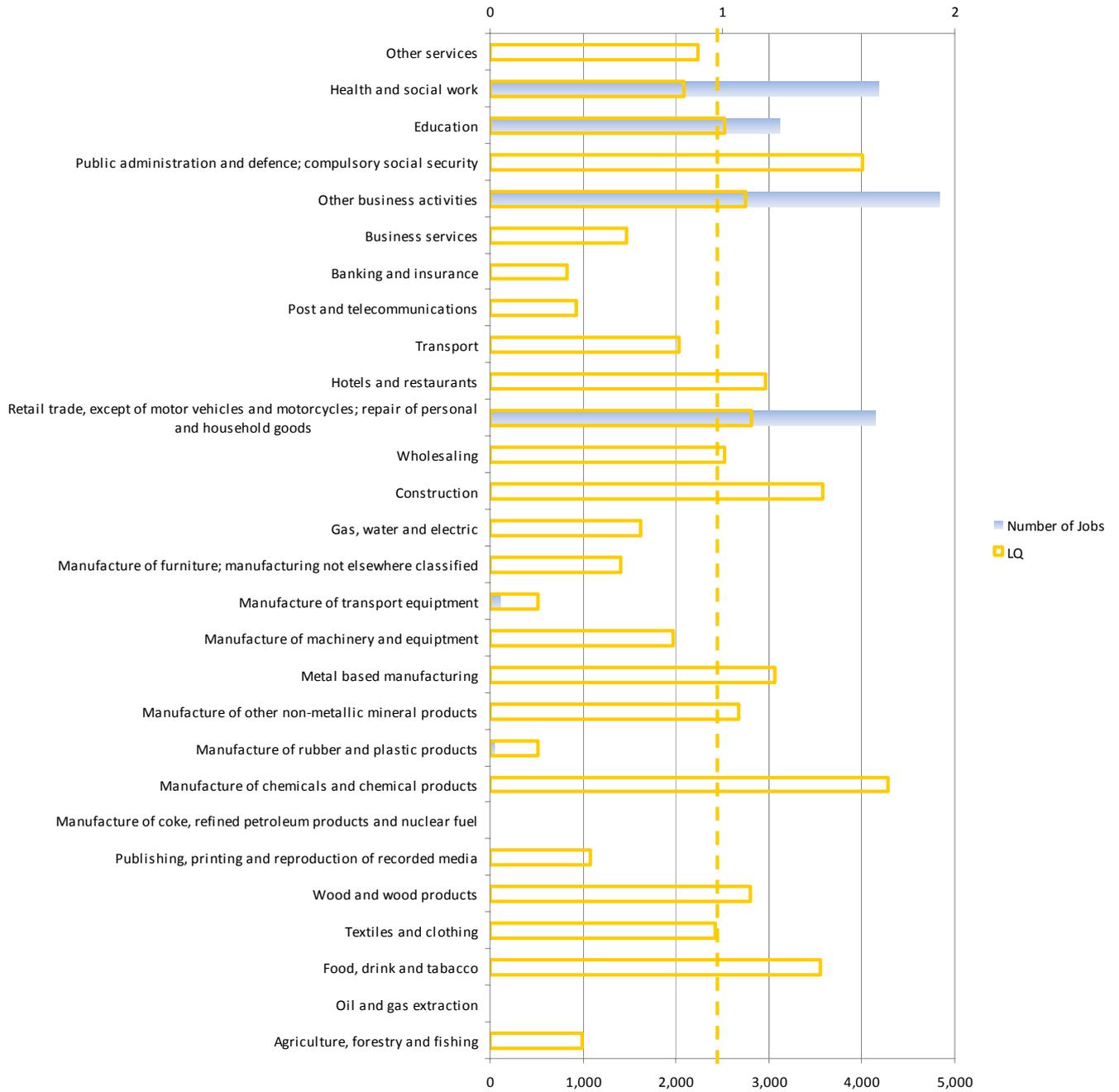
7.0 Economic Potential and Growth Sectors

- 7.1 This section assesses the future economic growth potential of Wyre and seeks to identify those industrial sectors likely to drive this growth. The analysis draws upon the findings of the preceding sections.

Future Potential

- 7.2 In order to identify the economic potential of Wyre, it is important to consider which industrial sectors are best placed to drive future growth. This is informed by an understanding of which sectors are under or over-represented in terms of local employment and their recent growth performance.
- 7.3 Figure 7.1 assesses the Borough's current sectoral strengths through the use of location quotients, which measure the concentration of employment in an industry at the local authority level relative to the regional average. Location quotients are shown using orange bars, with anything above 1.0 denoting a higher local representation of a sector relative to the North West average and anything below 1.0 signifying an under-representation. The greater the orange bar is from 1.0, the greater the extent of over or under-representation. Additionally, the blue bars show the absolute level of employment within Wyre accounted for in each sector.
- 7.4 The graph shows that no sector has a location quotient above 1.7, indicating that with the partial exception of chemicals, Wyre does not have an overwhelming over-representation in any particular sector. It can, however, be seen that the Borough has a modest over-representation in a varied range of sectors. This includes public administration, and construction as well as some traditional, lower value manufacturing sectors such as metals and chemicals. The over-representation of these sectors within the local employment structure is an indication that Wyre offers some competitive advantage to these sectors that enables them to flourish by locating in the Borough.
- 7.5 Wyre has a higher representation than the regional average in a number of service sectors, such as in retail, hotels and restaurants and the food and drink industry - evidence of Wyre's strong tourism and leisure focus. Education, wholesaling, textiles and clothing are represented equally at the local scale as they are regionally.

Figure 7.1 Location Quotients of Economic Sectors in Wyre

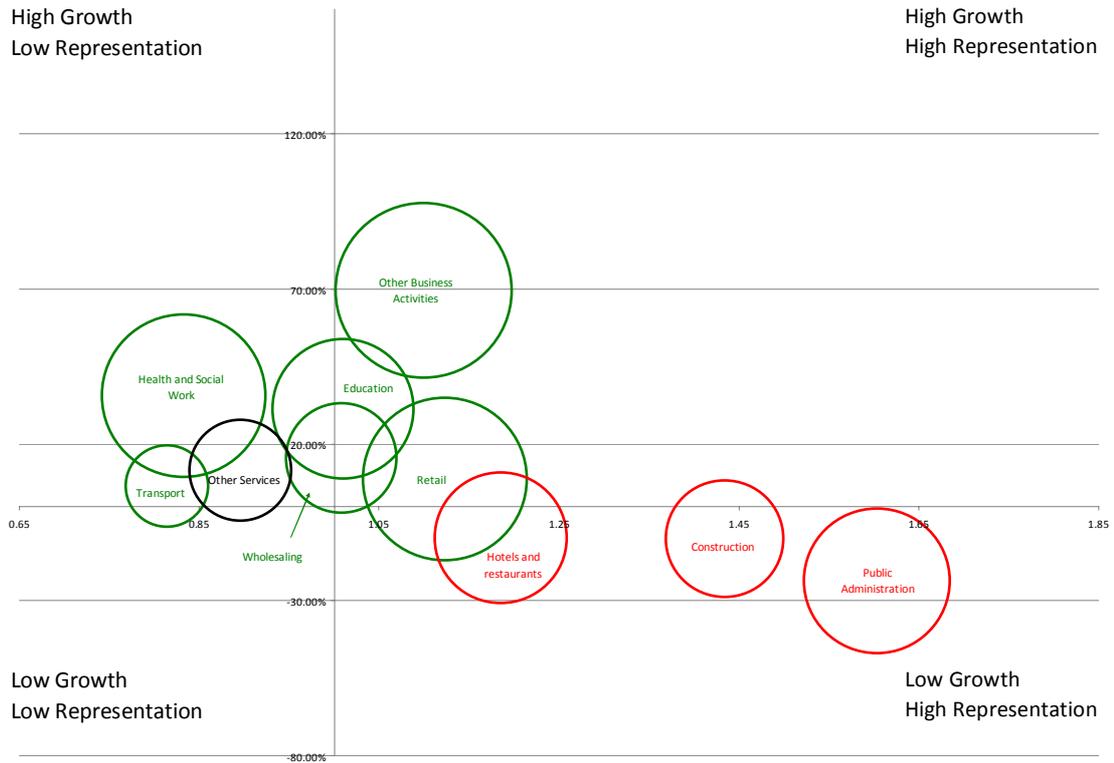


Source: NLP analysis, Based upon BRES data (2010)

7.6 Figure 7.2 shows the relative representation of sectors in Wyre as well as levels of employment change over the period 1998 – 2010. Additionally, the relative size of the ‘bubble’ for each sector represents the level of absolute employment within Wyre.

7.7 It is also important to understand the direction of employment change. Within the chart, those sectors where employment growth in the Borough has out-performed the North West average are highlighted in green, whilst those shown in red have under-performed relative to regional growth.

Figure 7.2 Growth, Representation and Size of Key Sectors in Wyre



Source: NLP analysis, Based upon BRES data (2010)

- 7.8 The top-right quadrant is most important in suggesting those sectors likely to drive future economic growth. It contains those sectors which have a high representation and have experienced positive growth. Within this quadrant, any sectors shown in green would be particularly relevant, as they would have experienced levels of growth above the North West average. These sectors might be expected to enjoy continued strong growth within Wyre, notwithstanding the current economic climate. For Wyre, this quadrant includes education, retail and other business activities.
- 7.9 The top-left quadrant contains those sectors that are under-represented relative to the regional average but have exhibited recent positive job growth. These sectors, which include health & social work, transport and other services offer opportunities for future growth. Health and social work appears particularly well positioned in this respect.
- 7.10 There is considerable uncertainty at present regarding potential public sector cuts which is likely to restrict future growth in this sector. It is also understood that the Department for Work and Pensions is relocating its employees from the Norcross to offices in Fylde and Blackpool, with a potential loss of 1,200 jobs for Wyre.
- 7.11 In broad term, the above analysis would suggest that the Borough's economic base is primarily the public sector (public administration, health & social work

and education), the service industry (retail, hotels, restaurants and other services), construction and wholesaling.

- 7.12 The potential for office-based sectors to drive future growth would appear to be mixed. Between 2000 and 2010, 'other business services' sector grew by 69%, with much of this growth taking place since the recession in 2008. However, banking and insurance, business services and public administration experienced negative growth during the period 2000 to 2008, and have suffered a further downturn since 2008 with the exception of public administration, which grew marginally. Business services has been the worst affected over the last 10 years, experiencing a 49% decline, which is markedly at odds with the North West region as a whole, which experienced a modest 2% growth over the same period.

Sectors with Growth Potential

- 7.13 Building upon this initial analysis and taking account of the locational requirements of a range of key industrial sectors, it is possible to form a view as to how likely Wyre is to develop or attract growth in these sectors over the study period. This analysis draws upon the findings of research undertaken by SEEDA, which examined the key drivers of business location by sector. Although it is acknowledged that the SEEDA⁴ work was not produced to reflect the North West commercial property market, it is considered that many of the findings hold true for the study area.

Financial/Business Services

- 7.14 A broad sector which includes a range of specialist, financial, insurance and general business activities. Business location decisions in this sector reflect factors such as access to markets/suppliers, access to a skilled and diverse workforce and high quality transport and telecommunications infrastructure. Quality of life factors, including good housing and cultural facilities are also important. As a consequence, many such businesses seek city centre premises, however, a number are attracted to more peripheral business park locations that provide lower rates and ample car parking.
- 7.15 Wyre's economy currently has a moderate representation of business services, although this primarily due to the strength of 'other business activities' (i.e. photographic, agency and consultancy services), which grew by 69% between 2000 and 2010 and, as such, was the Borough's fastest growing sector. In contrast, the banking and insurance and business services sectors (i.e. real estate and scientific research & development) are under-represented in the Borough, contracting by 21% and 49% respectively over the ten year period to 2010, despite remaining stable at the regional level. Analysis has shown that, in fact, banking and business services in Wyre suffered only a small contraction

⁴ *Spatial Requirements of Key Sectors in the South East*, SEEDA (2004)

prior to the economic slow down in 2008, but have experienced a strong downturn since.

- 7.16 In order to successfully attract a greater number of businesses in the sector, there will be a need to provide more appropriate accommodation. The development of high quality, modern office premises would help in this regard. In the long term, there appears to be some potential for future growth in 'other business activities' given the strong growth of this sector during the recession.

Distribution

- 7.17 Key locational factors for distribution and logistics activities are the availability of low cost warehousing, storage and distribution sites, whilst access to the strategic road network is critical. The sector is under-represented in Wyre with wholesaling accounting for 1,236 jobs and transportation accounting for 992 jobs. However, levels of employment in transportation grew by 91% between 2000 and 2010, whilst in wholesale they contracted by 14% over the same period.
- 7.18 The vast majority of employment in transportation (land and water-based) is associated with the servicing of Fleetwood Port. Any future growth in this sector is therefore likely to be dependent upon future investment in Fleetwood Port and it being able to stay ahead of competing fresh water ports in the UK. This may be tempered by the desire to secure a rail link to the port, which would see a potential switch from road to rail, with a consequent decrease in road haulage jobs. The existing port-based industries at Fleetwood are highly dependent upon goods being imported by road. The fish processing industry, for example, is reliant on its raw materials being transported by road from locations such as Grimsby and its finished product being distributed out by road. This contribution to transport distribution is vulnerable, as the processing plant is footloose and could move to another location.
- 7.19 Any future growth will also be dependent upon the availability of large, low cost sites with good accessibility. Improvements to the strategic road network, in order to improve access to the urban west of the Borough, would therefore be vital. Reinstatement of the former rail corridor to Fleetwood, via Poulton and Thornton, could also offer potential new opportunities to the distribution sector by facilitating the future development of up to 10 ha of industrial land close to the proposed station at Burn Naze, with easy access to freight sidings.
- 7.20 Overall, there appears to be limited potential for growth in the distribution/logistics sector.

General Manufacturing

- 7.21 Wyre has a fairly low proportion of employment in manufacturing relative to the regional average, but with a slight over-representation in sub-sectors such as metal-based manufacturing and the manufacture of non-metallic minerals products. The sector is relatively cost sensitive and therefore access to a supply of affordable sites and premises will remain important, although

competition from lower cost locations abroad continues to increase. Other key locational factors for the sector include good transport accessibility and an appropriately skilled labour force.

- 7.22 None of the Borough's general manufacturing sub-sectors have grown in employment terms over recent years other than wood/wood products and metal-based manufacturing and even this growth was only marginal at 2% and 8% respectively. However, the fact that they have proved resilient to contraction, compared to the regional trend, could indicate that the Borough has some competitive advantage in the sector. Whilst other manufacturing sub-sectors have contracted over the period 2000 -2010, this was generally less than the North West region as whole, with the notable exception of rubber and plastic manufacturing, which contracted by 260% compared to the regional average of 52%. One area of potential future growth, however, is the agriculture and food technology sub-sector, with local Mysercough College signing a research agreement with the University of Lancaster in respect of environment and agricultural issues including food technology and food security.
- 7.23 While some further decline in employment levels is likely overall, this could be expected to occur at a lower rate than the regional average, particularly if issues of poor access and congestion on the road network are addressed in the near future.
- 7.24 Overall, it is considered that the sector offers limited growth potential and efforts should be focused on managing its decline.

Advanced Manufacturing/Engineering

- 7.25 This sector typically comprises of higher value manufacturing and engineering uses that rely upon greater technological and skill inputs. Important locational factors for the sector include proximity to the strategic road network, availability of high quality business park environments and flexible/affordable workspace. However, the critical factor is the availability of skilled, qualified and experienced staff. Indeed, previous ELRs undertaken by NLP in the North of England have found that many businesses in the sector tend to remain broadly in their historical location in order to retain their workforce.
- 7.26 Wyre has a moderate base in these sectors, with an existing over-representation in the manufacture of chemicals/chemical products. Hillhouse Business Park offers a prime strategic location for future high quality business growth in this sector, and is already home to a number of prominent international chemical businesses, including:-
- [Victrex Plc: the leading global manufacturer of high performance polymers; and,](#)
 - [Asahi Glass & Chemicals Europe Ltd: one of the world's leading producers of fluorochemicals and fluoropolymer materials](#)

- 7.27 Due to the specialist nature of the businesses located at Hillhouse, and the contribution that they makes to the local economy, the Business Park is considered to be of at least sub-regional importance. Due to the size of the site, it also represents the Borough's greatest opportunity for attracting new advanced manufacturing firms or spin-off businesses. The Borough's proximity to UCLAN, which has a particular research specialism in advanced digital manufacturing technology, may also offer good prospects for further growth in this sector.
- 7.28 However, Wyre's resident population contains a lower proportion of the highly skilled workers demanded by the sector. The Borough also contains a lower proportion of knowledge based industries which make up this part of the sector. In addition, the downsizing of BAE Systems Warton and the new Enterprise Zone there is likely to create a hub of available property and highly skilled staff looking for new employment opportunities. This clearly will be a major competitor to any strategic site brought forward in the Wyre area.
- 7.29 It is considered that the sector offers fair to good growth prospects if favourable conditions materialise.

Information Communications Technology (ICT)

- 7.30 Wyre has a low representation of employment in computer-related activities, which experienced negative growth over the period 2000 – 2010, with the number of jobs falling by 69%. Important locational factors for the sector include high quality ICT infrastructure, the availability of a skilled workforce, as well as proximity to a major metropolitan centre and the market opportunities that this provides.
- 7.31 Overall, the sector is considered to offer potential for modest growth in ICT and related technologies. However, this is likely to be attracted to the rural parts of Wyre and make use of rural farm conversions and small scale developments. This sector has the potential to grow without substantive provision for new business parks. Notwithstanding this, the potential rate of growth will be very much dependent upon the ability to deliver super-fast broadband, which may require creative solutions beyond the BDUK funded rollout. Further growth may result if the Borough is successful in expanding its business services sector, as this sector is a key driver of demand for ICT services.

Environmental Technologies/Energy

- 7.32 This sector includes activities such as the production of electricity, gas and steam, renewable energy technologies, recycling, water treatment, decontamination and other environmental consultancy. It is one that many other areas of the UK are targeting and some are particularly advanced in promoting. Key considerations with respect to location decisions for the sector include the availability of skilled labour resources, proximity to universities with relevant R&D facilities, access to customers/suppliers and available

incubator/move-on facilities. For waste-related activities, proximity to large population and manufacturing centres is important.

- 7.33 The gas, water & electricity sub-sector is notably under-represented compared to the regional average and employment in this sector has fallen by 37% over the period 2000 – 2010, despite remaining stable at the regional level. Other areas of the sector (sewerage, waste collection, treatment and remediation) are more significantly underrepresented relative to the regional average but grew by 10% over the ten year period to 2010.
- 7.34 The potential for future growth in the Borough, by contrast, is good. We understand there are plans for approximately 2,000 wind turbines in this area of the Irish Sea, which have the opportunity to be realistically served and maintained by Fleetwood, with Barrow now at capacity. ‘Wyre Power’ also has plans for the construction of a £600m gas fired power station at Hillhouse International. In addition, fracking companies have shown an interest in exploring the suitability of Wyre as a location for shale gas fracking, which would require the use of up to 20 sites of 1 acre each. The latter industry, however, is environmentally sensitive and controversial, and is dependent upon the Government’s willingness to support its continued exploration.
- 7.35 UCLAN, based in Preston, cites energy and power management as one of its specialist research areas providing opportunities for new and growing businesses to collaborate with one of its two Universities and source highly skilled graduate employees. Myerscough College also has the potential to support ongoing growth in the sector, offering courses such as waste management.

Healthcare/Biotechnology

- 7.36 The primary locational driver for the sector is access to relevant research and development activity, with many business start-ups requiring close university links. Additionally, access to a pool of suitable graduate labour and proximity to existing bioscience clusters can also be important to businesses, whilst large, lower-cost sites are often sought for production facilities. Locations with good access to major metropolitan centres are often viewed as preferable. This sector also includes activities such as health and social care.
- 7.37 There are no existing clusters of research and development in biotechnology and natural sciences within Wyre as demonstrated by the fact that no-one was employed in this sector in 2010. The Fylde Coast Economic Strategy acknowledges that the area does not have the infrastructure for a science and research base and for these reasons any future growth in this sector is expected to be very limited.

Creative Industries/Media

- 7.38 This diverse sector includes activities such as publishing, graphics, software and web design etc. Key locational factors sought by businesses in the sector include access to broadband, areas with an attractive lifestyle and sometimes

the image of the location. In addition, access to London's large client base is also beneficial. The availability of skilled staff and affordable town centre premises with a good cultural image can also be important. A high proportion of freelance contractors typically work from home or within small offices.

7.39 Wyre's representation in Creative Industries/Media is on a par with the sector's representation at the regional level. However, contrary to the North West region, which experienced a 16% decline in this sector over the period 2000 – 2010, Wyre experienced substantial growth (36%).

7.40 As with many attractive rural locations in the UK, there is potential for further 'organic growth' in small businesses in the creative and media sectors. As with ICT, these will typically be attracted to existing buildings or small conversions outside the main settlements. Garstang's proximity to the M6 is likely to support some growth in this sector.

7.41 The Fylde Coast Economic Strategy recognises that the area is generally peripheral in terms of access and therefore seeks to address this by attracting investments that are relatively unaffected by this factor, such as within the creative or small-scale craft based sectors. It is understood that there is also some early activity around proposals to encourage the location of creative industry clusters in older deprived former holiday neighbourhoods on the Fylde Coast.

7.42 It is therefore considered that future growth in the creative industries is likely to be moderate.

Leisure and Tourism

7.43 Wyre has a slightly higher representation of employment in the hotel and restaurant sector than the regional average but a significantly lower representation of employment in recreation, culture and sporting activities. However, over the period 2000 - 2010, the hotel and restaurant sector contracted by almost 10% in Wyre, whilst growing by 12% at a regional level. Over the same period, jobs in recreation, culture and sport grew by 20% in Wyre but by 30% across the North West as a whole. Important locational factors for the sector include a substantial residential population; proximity to nearby attractions and conferencing events/venues; as well as the availability of a fairly low skilled and cheap labour force.

7.44 Overall, this sector is considered to offer potential for modest growth, notwithstanding the aspirations of the Fleetwood Seafront Masterplan. Many analysts consider that the recreation and leisure market has now reached saturation in some sub-sectors, such as bingo, multiplex cinemas and ten pin bowling. The economic downturn since 2008 will have curbed further growth in leisure spending as this is usually an early casualty of reduced disposable income. Wyre's ability to expand further in this sector is also likely to be tempered by reduced access to public sector funding for leisure and civic facilities and its proximity to the higher order centres of Blackpool, Lancaster

and Preston, which residents of Wyre have good access to. These issues are addressed in more detail in Section 11.0.

Construction

- 7.45 Wyre has a high representation of employment in the construction sector. However, the sector contracted by 10% over the period 2000 – 2010, slightly more than the North West average. However, it should be noted that the sector has been affected significantly by the current recession.
- 7.46 The majority of employment in the sector is ‘on-site’ and as a result generates little requirement for commercial premises. It does, however, create a requirement for storage depots and wholesale premises supplying construction products and materials. Such uses are particularly cost sensitive and will therefore tend to locate in areas of the Borough with low land values. Overall, the future growth potential of the sector within Wyre is considered to be low.

Wyre’s Future Economic Role

- 7.47 The analysis set out above has identified a number of sectors where moderate or moderate-high levels of growth can be anticipated within Wyre. In broad terms, the Borough’s competitive advantage moving forward appear likely to be based upon the area’s strengths in advanced manufacturing/engineering with emerging opportunities in ICT and creative and media sectors and particularly environmental technology and the energy sector, given the interest that fracking companies have shown in exploring the potential for developing sites in Wyre and the Fylde Coast generally.

Table 7.1 Future Growth Potential for Key Industrial Sectors in Wyre

Sector	Current Representation in Wyre	Future Growth Potential in Wyre
Financial / Business Services	Moderate	Moderate
Distribution	Low/Moderate	Low
General Manufacturing	Low	Low
	Moderate	High/Moderate
ICT	Low	Moderate
	Low	High
Healthcare/Biotechnology	Low	Low
Creative and Media	Low	Moderate
Leisure and Tourism	Moderate	Moderate
Construction	Moderate/High	Low

8.0

Future B Class Employment Space Requirements

Introduction

8.1

This section of the report assesses the projected demand for employment land likely to be required in Wyre Borough from 2011 to 2029, equating to the Local Plan period. Consideration is also given to the type of employment space likely to be required.

8.2

To estimate the broad scale and type of additional employment land required, a number of different indicators and factors have been considered. The principal approaches most commonly used when assessing future employment land needs are based on:

- 1 forecasts of employment growth in the main B class sectors;
- 2 projecting forward past take-up trends of employment land, with adjustments (if necessary) to reflect changing economic conditions;
- 3 considering population forecasts and future growth of local labour supply and the amount of jobs and employment space that this can support.

8.3

All these approaches have some limitations and need to be considered together along with other indicators to give a robust view of future employment space needs. In addition, the economic growth potential and likely demand for employment space in Wyre needs to be assessed under a range of different future scenarios.

Factors effecting Future Employment Space Needs

8.4

Given the differing pictures indicated by the employment-based estimates and past-take-up trends, a range of other indicators have also been reviewed to inform a judgement of where the best estimate of future needs should lie. Some of these factors pull in different directions and a balance has to be drawn between them.

8.5

Trends in the national economy will clearly be a significant factor affecting future demand for employment space. The UK is currently experiencing an economic slowdown and financial credit shortage which has culminated in a 'double-dip' recession. As yet, there is no agreement amongst economists as to when we are likely to see a recovery. However, this study estimates employment space requirements over an 18-year period over which short term fluctuations should even out; furthermore, the past development rates assessed provide information stretching back to 2001/02 and include 4 years of recessionary data since 2007, hence it is considered that they would not need significant further adjustments to reflect the future outlook.

- 8.6 The need to **replace land or premises lost** (or released) to other uses to maintain the level of the current stock of employment space has been considered. Very little detailed data is available on losses in the Borough; hence attempting to draw out any broader trends upon which to make future assumptions on future losses is highly problematic. Some replacement of space lost to housing or other uses may be needed if the current level of stock is to be maintained, or if any further large sites are to be released to other uses, although use of net take-up rates would assume some losses anyway. Following discussions with WBC Officers, it is understood that some 13 existing employment sites/allocations (totalling 38.13ha) are identified in Wyre's current SHLAA as being potentially deliverable/developable for housing over the plan period and may be lost from the employment land portfolio as a result.
- 8.7 **Vacancy levels** and floorspace availability provide another indicator of the balance between current supply and demand for employment space. A typical vacancy rate in a normal market would be around 8/10% to allow for movement and expansion of firms and a choice of locations. Evidence suggests that vacancy rates for industrial/commercial properties in the Borough currently stand at around 7%, which could indicate a slight undersupply in the market. The specific figure for office floorspace is even lower, at 3%, although the ongoing DWP relocation from the Norcross site will have a significant impact on this figure over the coming months.
- 8.8 Looking at **commuting patterns**, the 2001 Census suggests that there is a relatively low level of self-containment within the Borough. A high proportion of local residents commute out of Wyre on a daily basis to work, primarily to the nearby Boroughs of Blackpool, Fylde, Lancaster and Preston. As of 2010, there were 35,840 jobs based in the Borough, yet 53,700 residents in employment, suggesting a ratio of 1.5. In order to redress this balance, it would be necessary to provide local residents with more opportunities to work closer to home, and hence the supply of good quality employment land could help to reduce levels of out-commuting in future.
- 8.9 Other factors which could impact upon future levels of employment space needed include the growing trend to **relocate certain business operations** to lower-cost locations overseas, often referred to as "off-shoring". The industries with the highest propensity for this have typically included communications, banking and finance, and some business services, in which Wyre has a very modest representation. Furthermore, although not strictly 'off-shoring', the relocation of the existing food processing sector to places such as Grimsby represent a continued threat due to the industry's relatively footloose nature. The Borough also has a very low representation of other important knowledge based industries, whilst congestion and inaccessibility of the easternmost part of the Borough ensures that it will be relatively unattractive to logistics and distribution companies. At the same time, opportunities could arise from renewable energy and particularly shale fracking, which could provide a considerable number of jobs over the next few years.

- 8.10 Another factor which would tend to reduce the amount of additional employment space needed in the future is the ability to achieve economic growth without corresponding increases in demand for employment space or labour, known as '**smart**' or '**landless**' growth. This could reflect increased automation, increased floorspace densities/plot ratios, labour productivity improvements, hot-desking, working from home, or more overtime working by current staff. It is difficult to quantify the extent of this effect.
- 8.11 **Competition** to economic growth in Wyre from surrounding districts and sub-regional centres such as Blackpool and Preston could also constrain future demand and hence the scale of employment land provision, although the former Borough is highly constrained and could actually require cross-boundary co-operation from its neighbours in order to meet its own land requirements going forward. Major developments and the new Lancashire Advanced Engineering and Manufacturing Enterprise Zone located alongside the BAE Systems facilities at Samlesbury (Ribble Valley) and Warton (Fylde) could compete for larger office or more probably industrial relocations. This factor may moderate the levels of growth and industrial/office relocations that Wyre could expect to attract.

Growth Scenarios

A. Job Forecasts Model

Methodology

Experian Econometric Modelling

- 8.12 To help inform the ELCLS, the latest local area-based econometric job forecasts were obtained for Wyre Borough from Experian Business Strategies. Job growth was forecast over the plan period from 2011-2029. Experian's sub-regional economic model takes account of the existing economic structure of each Local Authority (broken down by economic sector) and the historical relationship between the regional performance of an industry and the performance observed at the Local Authority level. The Experian model suggested that the Borough would grow by around 825 workforce jobs between 2011 and 2029.
- 8.13 An additional scenario was developed which took the actual level of employment growth observed in the Borough over the period 2000-2010 (using ABI and BRES data, with an adjustment made to ensure that the two datasets are comparable) and projecting these forward to 2029. Whilst factoring in the impact of the recession and continued economic downturn, it essentially adopted a predict-and-provide approach, assuming that those sectors that have grown strongly over the past ten years (or, as with certain manufacturing sectors, declining) will continue along their past trajectory over the plan period.

- 8.14 This approach suggested a total jobs growth of around 9,185⁵ between 2011 and 2029, with sectors such as education, retail, health and other business activities exhibiting particularly strong growth, compared to continued decline in certain traditional manufacturing sectors (notably textiles), construction and particularly public administration. It should be noted that the figures used in this scenario relate to 'employee' jobs, rather than total employment, as this latter figure is unavailable via the ABI historic database. Employee jobs excludes self-employed, government-supported trainees and HM Forces, hence the overall figure in 2011 will be lower than the Experian baseline figure (which is based on total employment).
- 8.15 In order to translate the resultant job forecasts into estimates of potential employment space, it was necessary to allocate the level of employment change forecast for office, industrial, and wholesale/distribution uses as follows:
- The office floorspace requirement is related to job growth/decline in the financial and business service sectors⁶;
 - The industrial floorspace requirement is related to job growth/decline in the manufacturing sectors⁷; and
 - The wholesale/distribution floorspace requirement is related to job growth/decline in the two SIC sectors of wholesale and land transport, storage and post⁸.
- 8.16 In order to translate the resulting figures into employment land projections, employment densities (as recommended in the HCA Employment Densities Guide⁹) and plot ratios by use class were then applied to the job change figures to translate these into employment land projections.
- 8.17 The Experian forecasts provide head count figures (i.e. total employment), rather than Full Time Equivalents [FTEs], with the latter required for conversion purposes. As such, it was necessary to translate the head count figures generated by the econometric forecasters into FTEs. It is generally accepted that 1 FTE equals one full time job or two part time jobs. Following a review of

⁵ Note: Industry class 81 'Services to buildings and landscape activities' indicates that in 2008, there were some 547 employees in this sector in Wyre; however, just 2 years later in 2010, the same category records a massive 3,490 employees. WBC Officers were unaware of any large company relocation/expansion in this sector that would generate such a significant increase, and based on previous experience it is possible that the leap could be due to a range of factors unrelated to a commensurate increase in staff based in Wyre; hence it was agreed to remove the 2,943 employees (the difference between 3,490 and 547) from this category to avoid a bias in the figures for this sector.

⁶ i.e. Media Activities, Computing & Information Services, Telecoms, Finance, Insurance & Pensions, Real Estate, Professional Services, some Administrative & Supportive Services (BRES (SIC 82.1, 82.2, 82.3, 82.9) as % of (SIC 77, 78, 79, 80, 81, 82)) and 10% of Public Administration and Defence.

⁷ Experian Manufacturing sectors, plus car repair, some construction and waste and remediation activities.

⁸ Experian wholesaling less car repairs, retail car sales, plus post/couriers and land transport.

⁹ HCA OffPAT (2010), Employment Densities Guide, 2nd Edition

the latest BRES 2011 forecasts for Wyre, it was apparent that on average, 86% of jobs in B1 related industries were full time, compared to 95% in B2 related industries and 92% in B8 related industries. Hence it was assumed that 1 job equates to 0.85 FTEs for B1, 0.95 for B2 and 0.90 for B8.

8.18 It was thereafter assumed that:

- One FTE B1a general office job requires 14sqm of employment floorspace (GEA);
- One FTE B1c light industrial job requires 50sqm of employment floorspace (GEA);
- One FTE B2 industrial job requires 37sqm of employment floorspace (GEA);
- A combined B1b/B1c/B2 factor of one FTE job per 44sqm was obtained by taking an average of the aforementioned B1c/B2 GIA equivalents;
- One FTE warehousing/distribution job requires 70sqm of employment space (GEA)¹⁰.

8.19 It has been assumed that a gross area of 1ha is required to develop 4,000sqm of out-of-centre office, industrial or warehousing/distribution space (equal to a plot ratio of 40%). For town centre office space, previous studies elsewhere in the country (see Arup/Donaldsons' Demand for Employment Land in Greater Manchester, 2006) use 200% as an appropriate plot ratio when calculating employment land requirements in City Centres. This latter figure necessarily assumes an office building of four stories in height, with 50% plot coverage. However, given that there are few high density office developments in Wyre Borough generally, a standard plot ratio of 40% was used for the B-class uses.

8.20 The demand projections generated via this employment forecasting technique represent a net future requirement for employment levels and do not take into account any future losses to non-employment uses. It is therefore necessary to adjust these figures in order to reconcile them against gross projections generated by analysing historic take up rates.

Sectoral Employment Growth

8.21 Before presenting the job growth outcomes from the scenarios it is worth highlighting, in broad terms, limitations in how these outcomes were generated:

- 1 they are predominantly trend-based estimates projecting historic growth patterns into the future;

¹⁰ In the absence of robust data relating to the likely split between high bay/low bay warehousing going forward in Wyre, the 'general' warehousing jobs ratio of 1 job per 70 sqm has been used from the HCA guidance.

- 2 they do not reflect job growth across the rest of the economy, e.g. in sectors such as retail, health and education sectors which, in many instances (particularly health) are key growth sectors for the future;
- 3 such forecasts tend to be most reliable at regional and national scales than at the local economy level, but can indicate the broad scale and direction of economic growth in different sectors and provide some guidance to assess future land requirements;
- 4 It is important to recognise that there is not always a clear cut relationship between employment change and employment land needs. Additional employment space can be needed even if employment itself is falling, for example if a manufacturing firm requires more space to enable greater automation and achieve job reductions through productivity gains.

8.22

The Experian Baseline 2012 employment projections for Wyre indicate that overall, there will be moderate growth in employment in the 38 defined sectors for the period 2011-29 of around 825 (2%), although this growth masks significant decline in a number of existing sectors including manufacturing (-2,613, or -43% overall), construction (-15%), agriculture (-74%), finance (-20%), and public administration and defence (-21%) sectors anticipated to experience the greatest proportional and absolute decline. However, these losses are more than outweighed by strong increases in sectors including land transport (+23%); media (+50%); Professional Services (+32%); Administration and support services (+20%); Education (+15%) and Residential Care & Social Work (+19%).

Table 8.1 Projected Employment Change 2011-29, Experian Baseline (2012)

Industrial Sector	Total Job Growth 2011 29	% Growth
Agriculture, Forestry & Fishing	390	73.6%
Extraction & Mining	0	0.0%
Food, Drink & Tobacco	130	18.3%
Textiles & Clothing	150	71.4%
Wood & Paper	130	68.4%
Printing and Recorded Media	10	11.1%
Fuel Refining	0	0.0%
Chemicals	360	73.5%
Pharmaceuticals	6	64.0%
Non-Metallic Products	20	11.8%
Metal Products	240	35.8%
Computer & Electronic Products	90	64.3%
Machinery & Equipment	70	38.9%
Transport Equipment	30	25.0%
Other Manufacturing	130	52.0%
Utilities	30	10.0%
Construction of Buildings	100	14.7%
Civil Engineering	0	0.0%

Industrial Sector	Total Job Growth 2011 29	% Growth
Specialised Construction Activities	-20	-0.9%
Wholesale	120	5.5%
Retail	110	2.4%
Land Transport, Storage & Post	290	22.7%
Air & Water Transport	10	6.3%
Accommodation & Food Services	270	7.7%
Recreation	30	5.4%
Media Activities	110	50.0%
Telecoms	0	0.0%
Computing & Information Services	90	31.0%
Finance	80	20.5%
Insurance & Pensions	0	0.0%
Real Estate	40	10.5%
Professional Services	550	32.0%
Administrative & Supportive Services	500	20.1%
Other Private Services	0	0.0%
Public Administration & Defence	740	20.7%
Education	520	14.6%
Health	200	9.9%
Residential Care & Social Work	450	18.6%
TOTAL	824	2.2%
Key:	>10% Growth	>10% Decline

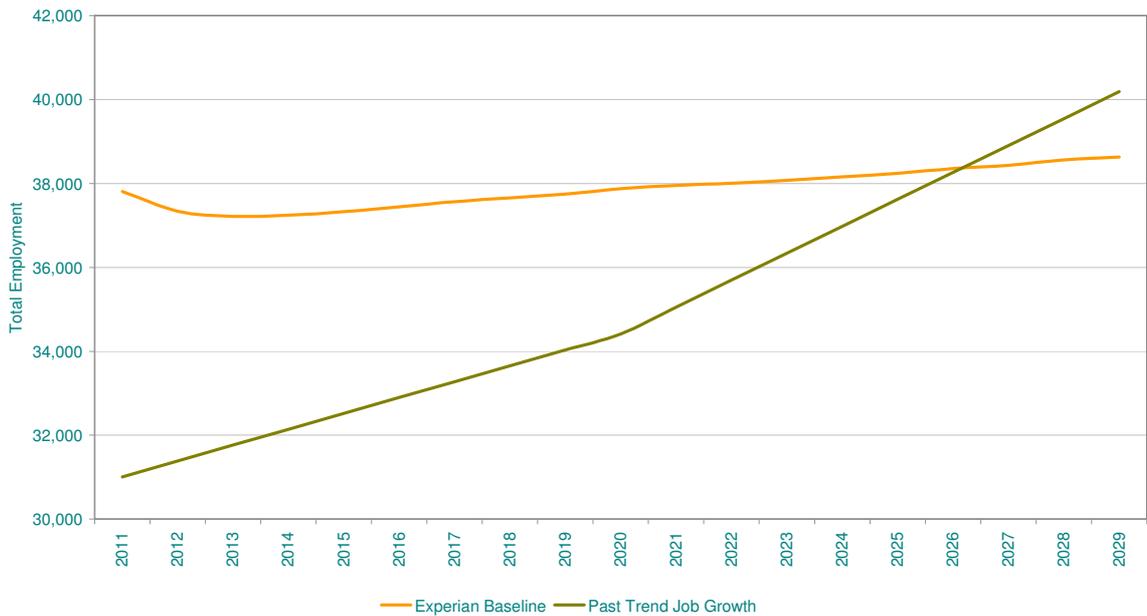
8.23 Table 8.2 and Figure 8.1 summarise the level of total net employment change forecast over the period 2011 to 2029 for Wyre Borough under each of the growth scenarios.

Table 8.2 Projected Employment Change 2009-31

Scenario	2011 29	
	Total	% Growth
Experian Baseline	+824	+2.2%
Past Trend Job Growth	+9,185	+29.6%

8.24 As might be expected, the total amount of net employment growth over the period 2011-29 is strongest under the earlier Past Trends Job Growth Scenario, with a substantial increase of 9,185 to 2029. This reflects the strong growth in jobs, particularly in the education and health sectors pre-recession, as well as in other business services. The contrast is particularly stark compared with the Experian baseline forecast, with levels of growth more than 10 times as high.

Figure 8.1 Total Employment Growth in Wyre Borough 2011-2029, Analysis of 2 Scenarios



Source: Experian / NLP analysis

Note: The figures used in the past trends job growth scenario relate to 'employee' jobs, rather than total employment, and hence the figures are lower than for the other scenario.

8.25 Table 8.2 and Figure 8.2 set out the projected change in employment within the B-class categories in the period 2011-29 for the two scenarios.

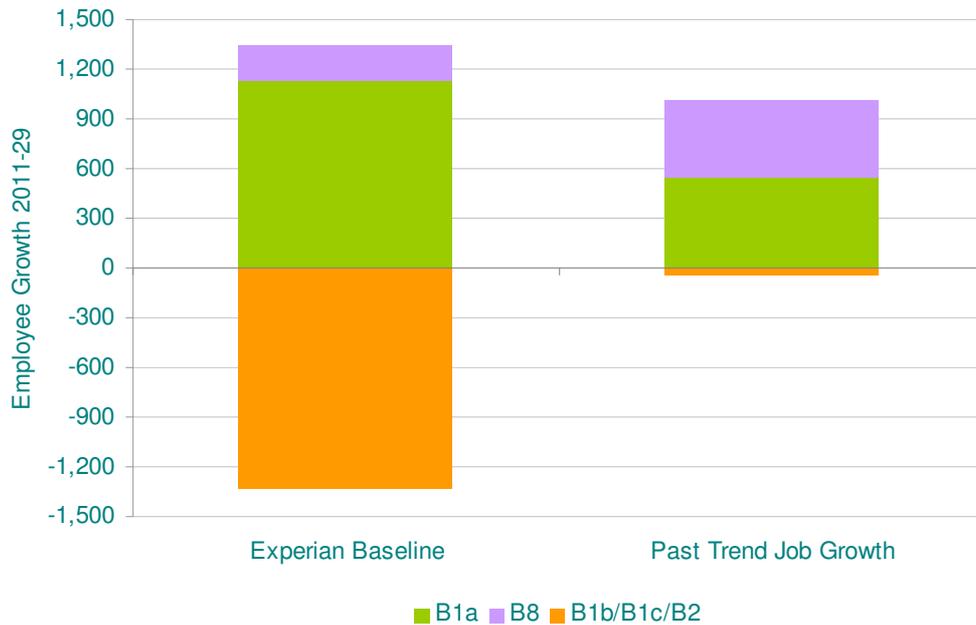
8.26 Overall, the econometric forecasts are broadly consistent in terms of the sectors forecast to grow/decline, with only the scale of magnitude differing across the scenarios, hence B1a office growth ranges from +544 employees to +661 (2011-29); manufacturing forecast to decline (ranging from -39 to -1,328); and wholesaling expected to experience slight growth, from +208 under the Experian Baseline, to +462 under the past trends job growth scenario. However, compared with the figures in Table 8.2, Table 8.3 demonstrates the extent to which the economy could be particularly reliant on employment growth in sectors not traditionally associated with B-class employment land (particularly under the past trend job growth scenario).

Table 8.3 B-Class Employment Growth Forecast 2011-29

	B1a Office	B1b/c B2 Industrial	B8 Storage Distribution	All
Experian Baseline	+661	-1,328	+208	-459
Past Trend Job Growth	+544	-39	+462	+967

Source: Experian / NLP analysis

Figure 8.2 B-class Employment Growth in Wyre (employment)



Source: Experian / NLP analysis

8.27 It is again stressed that whilst econometric forecasts can provide a helpful starting point as to the likely future requirements for employment space, some degree of caution needs to be applied, due to the wide range of factors that shape economic outcomes locally. Clearly, the starting point for this assessment, 2011, represents a time when productivity in the economy was recovering slowly from a historical low point, and hence the forecasts have had to factor in the continued economic slowdown (albeit recognising that both scenarios assume that the economy will recover in the medium to long term).

8.28 These adjusted job growth forecasts were subsequently translated into employment land requirements through the translation of jobs to FTEs; and the application of standard employment densities, vacancy rates and plot ratios, using the methodology set out earlier in this section¹¹. For Wyre, this generates a net employment land requirement of between -8.5 and +8.5ha for the period 2011-2029 as indicated in Table 8.4.

¹¹ Note: it is generally recognised that there is a complex relationship between job decline in manufacturing sectors and how this reduces the need for factory floorspace over time. In certain circumstances, it has been appropriate for ELRs to assume that the decline in B2 jobs will not directly translate into a comparable decline for B2 floorspace, and a suitable adjustment is made to the forecasts. However, in Wyre, comparison between the Experian job forecasts and the Commercial and Industrial Floorspace and Rateable Value Statistics suggests that the relationship is not clear-cut, with B2 jobs/floorspace fluctuating significantly in recent years, with no clear observable pattern. On this basis, no adjustment was made to offset B2 job decline with comparable B2 floorspace loss.

Table 8.4 Net Employment Land Forecasts 2011-29 (ha)

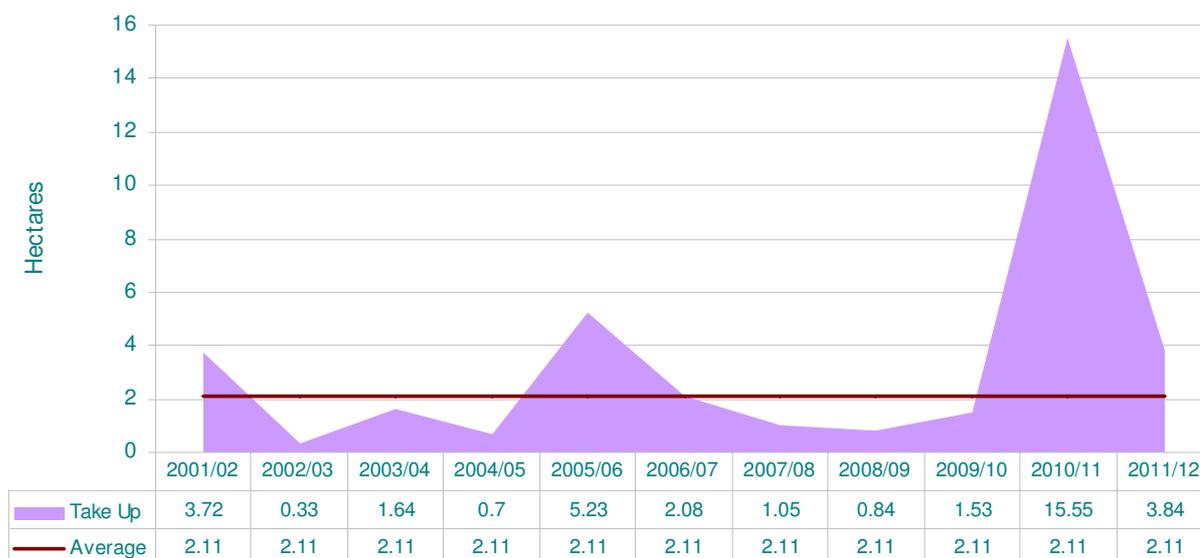
	B1a Office	B1b/c B2 Industrial	B8 Storage Distribution	Total
Experian Baseline	+1.97	-13.72	+3.27	
Past Trend Job Growth	+1.62	-0.40	+7.28	+8.50

Source: Experian / NLP analysis

Past Take-up Rates – Results

8.29 The take-up of commercial office/industrial space in Wyre Borough has been obtained from a detailed analysis undertaken by WBC Officers. The data indicates that, in the past 11 years, 36.51ha of allocated/ committed employment land had been taken up for development, which equates to 3.32ha per year. As noted in Section 6.0, 13.3ha of this relates to the Lancashire Waste Technology Park development in 2010/11; if this development is removed from the figures, the annual average drops to 2.11ha.

Figure 8.3 Employment Land Development Rates (ha) within Wyre 2001/02 to 2011/12



Source: Wyre Borough Council (July 2012) (note: annual average excludes the 13.3ha Technology Park development in 2010/11)

8.30 At a very basic level, projecting the (3.32ha) employment land take up forward to 2029 could suggest a requirement for around 59.75ha (net) of employment land. It is recognised that this presumption is based on a limited data source and does not factor in the likely impacts of a depressed demand arising from the economic downturn, which could continue to reduce take-up in the short to medium term.

8.31 It is considered that a strong argument could be made that the very high level of take up that was achieved in 2010/11 was directly related to the one-off Lancashire Waste Technology Park, which has distorted the overall figures and may not be seen again over the plan period for a combination of reasons

including the move towards a more Business Services-orientated economy, with significantly higher employment densities; the restructuring of the traditional manufacturing economy with the potential for 'recycling' of older sites; the long term impacts of the recession and the significant reduction in public sector spending available to deliver difficult brownfield sites; and the need to consider alternative uses for existing B-class allocations (i.e. for waste and recycling). Furthermore, the annual average rate with this development included (3.32ha) was met or exceeded on only four occasions over the past 11 years.

- 8.32 Against this is the fact that the past take up rates have already included three years of significantly depressed construction rates on employment land. It is therefore considered that by stripping out the 13.3ha B2 industrial development from the figures overall, the adjusted annual average rate of **2.11ha** represents a more appropriate level of land to plan for going forward annually over the plan period, equating to an 18-year requirement of **37.98ha** net.

Gross Employment Space/Land Projections

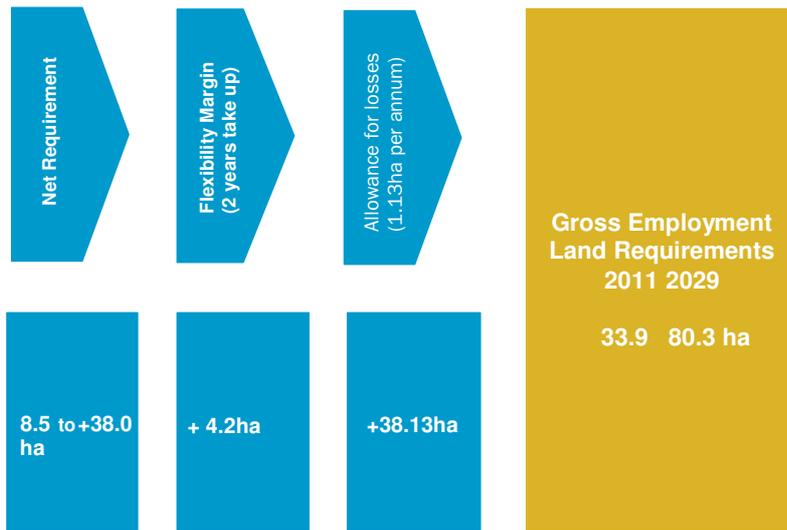
- 8.33 It is necessary to adjust the net employment land projections in order to reconcile them against gross projections generated by analysing the likely amount of land that could be lost for planning purposes. An alternative approach would be to analyse historic losses for planning purposes and taking a judgement regarding the extent to which these are likely to continue in future; however, data collated by WBC is patchy in this regard and is unavailable on a comprehensive basis.
- 8.34 As a result, an assessment has been undertaken with WBC Officers of the most recent SHLAA for Wyre Borough Council (2012). This highlighted the potential for around 13 existing employment sites to be redeveloped for residential uses over the next 15 years. It is considered that the losses could total **38.13ha** to 2029, at an annual average rate of **2.12ha**.
- 8.35 There is an argument that not all such losses of employment land should necessarily be replaced or reflected in an increased gross land requirement. This would be on the basis that Wyre's stock of employment land contains some older sites less likely to meet future needs and is of a scale that reflects past industrial patterns, rather than the amounts of land needed in future. However, against this argument is the likelihood that other 'windfall' sites are also likely to be lost over the next 18 years that have yet to be picked up in the SHLAA. It is suggested that the 'planned' rate of losses, 2.12ha, remains a reasonable basis to go forward, although this should be monitored by WBC over the next few years and adjusted as necessary. It was not possible to make a judgement regarding the B-class use type of the existing land to be lost.
- 8.36 In summary, by factoring in the likely net losses of employment land (+38.1ha) to the job-forecast-based net projections presented above (ranging from -8.5 to

+38.0ha) would generate a **gross employment land requirement of between 29.7ha and 76.1ha for the period 2011-29.**

Adjusting the Margin of Choice

- 8.37 Even where the identified demand for employment land is likely to decrease, it is considered that allowance should be made for new development coming forward to reduce the risk of stagnation and further decline in the market and cater for unforeseen requirements. Consequently, it is desirable to allocate more land than is likely to be used, as some land may not come forward for development in the short to medium term (if at all). This is particularly the case for those sites which have been carried over from past plan periods and those with significant constraints to overcome.
- 8.38 It is standard practice to allow for a degree of flexibility, or '**margin of choice**', in the allocations by applying a stated factor in the demand calculations. This reflects the need for a fairly generous additional allowance on top of the initial estimate of employment space needs for a number of reasons, including:
- as a margin for error given the uncertainties in the forecasting process;
 - to allow developers and occupiers a reasonable choice of sites;
 - to allow for reasonable vacancy levels to facilitate 'churn' in the market;
 - to give some flexibility and decanting space while older premises are redeveloped and new premises are coming forward; and
 - to cope with factors such as some allocated sites not coming forward and some redundant industrial sites not being suited for new employment uses.
- 8.39 A conservative margin of choice equal to 2 years worth of past take up was applied. This is considered to be an appropriate and relatively modest margin of choice on the basis that this allows for flexibility in terms of the likely 1-2 years lag between the grant of planning permission and the implementation of the scheme, and would reduce the risk of oversupply of employment land in the Borough.
- 8.40 **Consequently, by adding on an allowance for replacement of losses and factoring in two years of take up (based on long term trends) to allow a margin for choice, this results in a gross total requirement of approximately 33.9ha–80.3ha between 2011 and 2029.**
- 8.41 The econometric model steps are summarised in Figure 8.4. The same steps described above to convert the net employment projections from net to gross (with a 2 year margin of choice) have been applied to the net historic take up figures described above for consistency.

Figure 8.4 Methodology for Defining Gross Requirement



Source: NLP

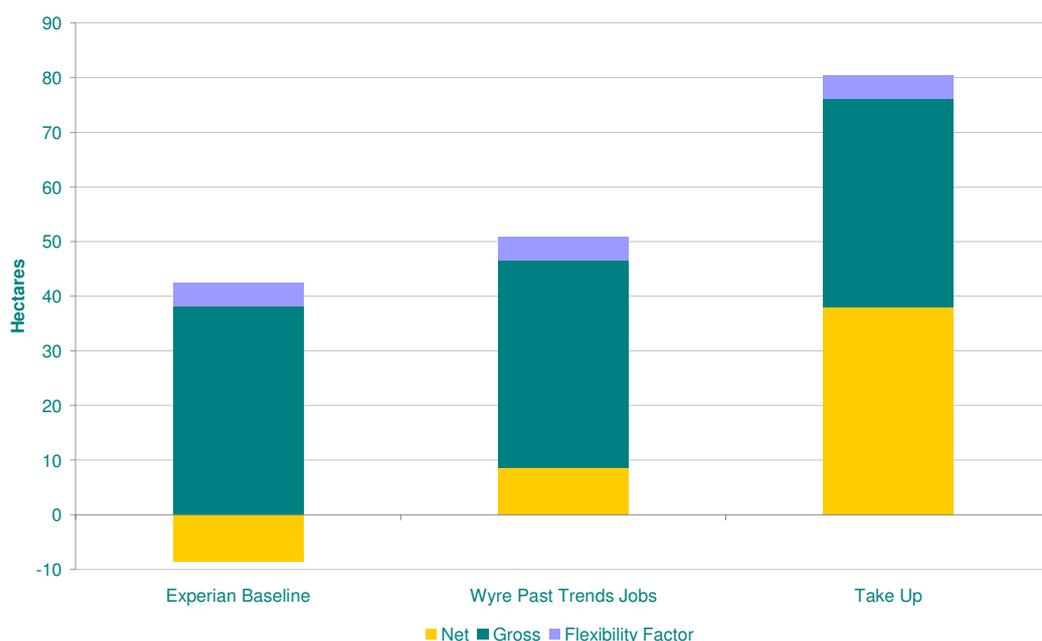
8.42

The full breakdown is illustrated in Table 8.5 and Figure 8.5.

Table 8.5 Gross Employment Land Comparisons 2011-29

		B1a	B1b/c/B2	B8	TOTAL
Experian Baseline		1.97	-13.72	3.27	-8.48
	2011-2029 (gross)	-	-	-	29.65
	+ Flexibility factor				33.87
Past Trend Jobs		-	-	-	46.63
	2011-2029 (gross)	-	-	-	46.63
	+ Flexibility factor				50.85
Take Up Projections	2011-2029 (net)	8.78	22.4	6.8	37.98
	2011-2029 (gross)	-	-	-	76.11
	+ Flexibility factor				80.33

Figure 8.5 Employment Land Projections 2011-2029 (ha)



8.43 In summary, the range of indicative total gross land requirements to 2029, factoring in a 2-year margin of choice, results in the following range of demand projections:

- Experian Baseline: 33.9ha
- Past Trend Jobs: 50.9ha
- Take Up Projections: 80.3ha

Sensitivity Tests

8.44 Clearly the level of future demand for B-use class land projected by the employment-based projections differs from the figures suggested by an application of past take up rates. The projections are largely trend-based; in particular, the Experian scenario reflects the position at the ‘bottom’ of the market. The past take up rates have clearly been at least partly recorded during an unprecedented boom in the commercial market nationally, and reflect the ‘predict and provide’ approach formerly used to inform ELRs. In reality, it is likely that the actual performance of Wyre’s economy and commercial property market will lie somewhere between the econometric projections and past take up.

8.45 In order to provide a clearer steer as to what level of growth the Borough should be planning for, it is important to apply a series of reality checks.

8.46 The two econometric model scenarios estimate a minimal net employment land requirement, ranging from -8.5ha to +8.5ha. Given that as at April 2011, it was estimated that there was around 91ha of available employment land recorded as being available in Wyre, this could necessitate substantial de-allocations.

Adjustments to Plot Ratios

- 8.47 The estimates of land requirements are clearly highly sensitive to the various assumptions used. The job/floorspace ratios and plot ratios adopted here reflected those in the ODPM guidance¹². At present, it is assumed that the plot ratio¹³ of 40% is applied across the board, to office space, industrial space and warehousing. In general terms, however, office space tends to have higher densities, particularly in built up areas. A sensitivity test was modelled that explored the implications of taking a plot ratio of 200% for B1a office space (i.e. 4 floors with 50% plot coverage, or 2 floors with 100% plot coverage), with the plot ratios for B2/B8 held constant at 40%. This would make only a slight difference to the overall gross requirements, of up to 1.6ha for the Experian Baseline scenario, and 1.3ha for the Past Trends Jobs scenario. Furthermore, information on three recently approved office development proposals in Poulton-le-Fylde, Thornton and Myerscough provided by WBC suggests that plot ratios are currently averaging around 24%, which is considerably lower than both the 200% and 40% plot ratios. On this basis, it is considered reasonable to assume that the majority of future office development in the Borough will be at plot ratios closer to 40% than 200%.

Adjustments to the Margin of Choice

- 8.48 Another more significant assumption in terms of sensitivity is the 2-year safety margin added. This increases requirements for all three demand-side scenarios by 4.2ha. However, a 2-year margin of choice may ordinarily be seen as being reasonable, particularly in the light of the ongoing recession and the need to provide market ready sites to prevent occupiers from moving beyond the Borough when searching for appropriate sites. In addition, there are a number of potentially good quality employment areas that are not in a position to be developed without infrastructure coming forward over the medium to long term, hence an increased margin of choice would help to provide a balanced portfolio. In summary, it is considered reasonable to retain a 2-year margin of choice to 2029.

Labour Supply Analyses

- 8.49 For purposes of comparison, the level of **labour supply** projected for Wyre has also been considered, since this could impact upon the Borough's ability to attract businesses and future job growth. Two labour supply scenarios have been considered:

¹² Employment Land Reviews Guidance Note, ODPM (2004)

¹³ A plot ratio is the total building square footage (building area) divided by the site size square meterage (area of the plot). Therefore, a plot ratio of 150% would indicate that the total floor area of a building is 1.5 times the gross area of the plot on which it is constructed. For practical purposes, this would equate to a 3 storey building with fifty percent plot coverage, the remaining plot area being occupied, for example, by access roads, parking and landscaping.

- 1 **ONS 2010-based SNPP population growth:** The ONS projections, published in 2012, forecast that the working age population of Wyre will increase by approximately 10,200 residents between 2011-29, although the vast bulk of this growth is forecast to be in the over 60s; the number of residents aged between 15 and 65 is actually forecast to decline by around 400 residents over the same timeframe. By assuming that the economic activity rate remains constant at the current rate of 77.3%, and that unemployment rates gradually decline from a high of 6.5% at present to the long term average of around 4.4%, it is estimated that the number of people requiring employment in Wyre would fall from around 50,070 in 2011 to 49,867 in 2029. Factoring in the current commuting ratio, whereby more people commute out of the district than commute in (resulting in a ratio of 1.498¹⁴), it is considered that the net job growth Wyre should plan to accommodate under this scenario would be in the order of -137 between 2011 and 2029.
- 2 **Wyre PopGroup Demographic Analysis:** This approach is underpinned by an NLP model run using the demographic analytical tool PopGroup. The outputs for the Baseline run, which incorporates the 2010-based ONS population growth projections and the 2008-based CLG Household projections for the Borough, indicates that the number of jobs required in Wyre would increase by just 78 between 2011 and 2029.

8.50 Typically (based on national figures), only about 45% of these workers will work in B class jobs which further reduces the number of B-class workers. By applying general employment densities (of 40 sqm per employee) and a standard plot ratio of 40%, the labour supply scenarios could result in net requirements ranging from -0.62ha to +0.35ha, as illustrated in Table 8.6.

Table 8.6 Labour Supply Assessments 2011-29

	Net Job Growth 2011 29	45% B Class	Floorspace Requirements	Land requirements (net)	Employment land lost	Margin of choice	Land requirements (gross)
ONS SNPP 2010-based population projections	-137	-62	-2,469	-0.62	+38.13	+4.22	+41.73
PopGroup Baseline	+78	+35	+1,404	+0.35	+38.13	+4.22	+42.70

8.51 The labour supply forecasts are reasonably close to the Experian Baseline and Past Trends Jobs Scenarios, although they are all some way below the 80.3ha net projection based on past take up to 2029, hence the labour supply demand forecasting approach could support the need for a broad range of employment land requirements.

¹⁴ Calculated on the basis that the BRES 2010 dataset records that 35,838 people were working in the Borough, compared to the Annual Population Survey's report that 53,700 residents living in Wyre were economically active and in employment for the same year, this equates to $53,700/35,838 = 1.4984$

Non B Uses

- 8.52 The development needs of economic sectors other than the B use classes were also considered. These are likely to be modest relative to the land requirements of offices for business and industrial uses. These other sectors will compete for employment land to a point, although the extent and nature does not appear likely to cause particular pressures on land supply. The needs of certain Sui Generis uses, notably energy generation (both renewable and through shale gas fracking) could potentially have significant land requirements over the coming years, although at present it is not possible to definitively identify how much, and where, land requirements are likely to be.
- 8.53 Tourism could also have a prominent role to play in growing the number of jobs in the local economy, raising awareness and improving perceptions of Wyre at a national level, although this sector will again generate limited employment land requirements. This sector could help to further diversify the economy, however, boosting levels of self employment whilst helping to reduce the high levels of out-commuting currently experienced in the Borough.
- 8.54 Consideration should also be given as to whether the growth of some sectors could be accommodated in existing employment areas in a way that improves sustainability and enhances the attractiveness of the site as an employment location. This may have some scope, subject to strict controls, to avoid adverse pressures on landowners from higher value uses thereby reducing the potential for lower value B Class development.

Summary

- 8.55 This section has appraised a range of employment land projections for Wyre Borough using a variety of methodologies. It is important to identify an appropriate level of need that achieves a balance between market realism and economic and planning policy objectives. A range of qualitative and quantitative factors have been considered within this report that can help to inform a judgment on the appropriate level of need, with the key issues set out below:
- Wyre has many advantages as an industrial location, with some established international companies, a number of smaller, burgeoning advanced manufacturing companies in the rural areas and competitive business rates. Opportunities also exist for land-hungry renewables and energy production sectors. However, the Borough underperforms regarding the burgeoning knowledge economy, with limited representation in a number of key hi-tech and business service sectors. The easternmost part of the Borough also suffers from poor strategic road accessibility and congestion, reducing its attractiveness to distribution and logistics sectors. The Borough faces continued challenges resulting from an ageing workforce, a relatively low skills base and continued public sector cuts;

- Future job growth projections for Wyre are therefore relatively modest in the medium to long term;
- The Borough has an opportunity to develop a competitive advantage as a destination for renewables and new forms of energy production, alongside aspirations to diversify the portfolio to allow for further development in Business Services;
- Take up rates in the District in recent years have been moderate, at 2.11ha per annum (excluding the recent Lancashire Waste Technology Park development), whilst the SHLAA identifies the potential future loss of around 38ha of existing employment land to non-B class uses in the years ahead;
- Labour supply analyses indicate that although the number of economically active residents is forecast to remain almost constant, with an ageing population (despite strong overall population growth over the same time period). If adjustments are made to the unemployment rate and reductions made to the number of out-commuters, then around 40-45ha (gross) could be required to 2029.

8.56

Consequently, it is considered that around **45ha (gross)** of employment land may be considered appropriate for WBC to plan for to 2029. This excludes any provision for adjoining authorities, and is approximate to the Labour Supply scenarios and the Past Trend Jobs scenarios. The figure is slightly higher than the Experian Baseline, but lower than the past take up rate would suggest. The figure accommodates Wyre's opportunities to develop a competitive advantage in the renewables and energy generation sectors (recognising that some of these uses would be classified as Sui Generis, rather than strictly B Class uses) alongside the established manufacturing strength, whilst factoring in the uncertainty of the ongoing economic downturn and public sector relocations.

9.0

Review of Current Employment Sites

Introduction

9.1

This section assesses the characteristics and quality of provision of employment areas within the Borough and analyses their suitability to meet future employment development needs. The Council has identified 27 existing employment areas. These are:

- Dorset Avenue, Cleveleys
- St George's Lane, Cleveleys
- Norcross, Thornton
- Hillhouse Secure Site, Thornton
- Lancashire Waste Technology Park, Thornton
- Burn Hall Industrial Estate, Thornton
- Red Marsh Industrial Estate, Thornton
- Copse Road, Fleetwood
- Hesketh House, Broadway, Fleetwood
- Port of Fleetwood
- Poulton Industrial Estate
- Robson Way, Carleton
- Windsor Castle Works, Poulton
- Bank View Industrial Estate, Hambleton
- Sunny Bank Industrial Estate, Hambleton
- Old Coal Yard Preesall
- Preesall Mill Industrial Estate
- Park Lane Garage, Preesall
- Nateby Technology Park
- Taylors Lane Industrial Estate, Pilling
- Head Dyke Lane, Pilling
- Green Lane West, Garstang
- Riverside Industrial Park, Catterall
- Brockholes Way Catterall
- Creamery, Industrial Estate Barnacre
- Calder Vale Mill
- Oakenclough Mill

9.2

These employment areas were inspected in July 2012. A pro-forma for each area is attached at Appendix 2. Their characteristics are briefly described below, alongside more detailed analysis of the available allocations within.

Approach to Assessment

- 9.3 In determining the sites to be included in the ELR assessment process, a wide variety of data sources were explored, including sites both within and without the planning process. This included:
- **Existing employment sites:** 27 clusters of existing sites (based on a comprehensive WBC list). Given the uncertainty concerning the future use of the Norcross site following DWP's ongoing relocation, WBC requested that a more detailed viability analysis was undertaken for the site (split into 6 sub-areas for the purposes of this assessment);
 - **Committed/Allocated Employment Sites:** 41 undeveloped allocated employment sites, along with sites with extant planning permission for employment use over and above a 0.25ha threshold; and
 - **Potential Employment Sites:** derived from a number of sources, including a Call for Sites exercise undertaken in 2012, which resulted in five further sites for assessment. Two further potential sites were also assessed in the vicinity of Catterall (Caterall Gates Lane South Extension and Brockholes Extension). These were identified by WBC Officers as possible extensions to existing industrial estates and detailed viability assessment are undertaken by SES in relation to these sites.
- 9.4 The list of sites assessed was agreed and refined with WBC, comprising a final total of 81 sites (including a number of larger sites split into their constituent parts to enable a comprehensive analysis). The locations of these sites and the site boundaries are illustrated in a series of plans provided in the pro-formas for each site at Appendix 2.
- 9.5 In July 2012 SES inspected all those sites identified by the Council and assessed them according to a range of market and sustainability criteria. An assessment was made of each site's suitability for employment uses, against a substantial list of criteria reflecting the CLG Guidance on Employment Land Reviews and Wyre's own specific local circumstances¹⁵.
- 9.6 Through the site inspections we have identified a handful of additional sites within established employment areas. These include employment premises that are now functionally obsolete and derelict sites that have been cleared.

¹⁵ It should be emphasised that these potential sites have not been subject to detailed scrutiny on infrastructure, development constraints or access requirements. More detailed investigation of any potential alternative sites will be required as part of the Local Plan process, further to the recommendations of this study and as relevant issues and options are assessed more generally by WBC.

- 9.7 The analysis was informed by a wide range of data sources ranging from flood risk to economic development benefits. In order to allow for the meaningful comparison of the allocations, the Norcross site shortly to become available (and subdivided into 6 smaller areas for the purposes of the site analysis) and potential new sites, the findings were refined down to 8 broad categories:
- 1 Local Road Access (including localised congestion)
 - 2 Proximity to urban areas and access to labour & services;
 - 3 Compatibility of adjoining uses (specifically relating to residential and other sensitive uses);
 - 4 Physical Characteristics (including topography, greenfield/PDL, shape and flood risk);
 - 5 Market attractiveness (quality and value);
 - 6 Compliance with Planning Policy / Sustainability Issues (particularly the Development Plan, the NPPF, national wildlife designations and other known heritage or ecological constraints);
 - 7 Infrastructure (including road constraints, car parking access, servicing required etc); and
 - 8 Other barriers to development (including known landownership constraints, site remediation, site clearance required, presence of electricity cables over the site etc).
- 9.8 Each site was assessed against these criteria and, for each factor, given a ranking between 1 (poor) and 5 (best). This information and scoring for each site, along with photographs and comments to explain the score achieved, can be found on Pro-Formas for each individual site contained in Appendix 2.
- 9.9 It should be emphasised that these categorisations are indicative to provide an estimation of the overall quality of the potential supply of sites. In addition, the types of uses for which each site was considered most suitable, and any constraints on delivering them, were noted.
- 9.10 Although these site ‘scores’ provide a reasonable indication of site quality and suitability, other considerations will also need to be taken into account in identifying a portfolio of sites such as their potential for a particular type of use and deliverability/timescale factors. The overall recommendations are not based solely on this numbering; other factors have also been taken into account. Nor does the numbering imply that the various criteria are of equal weight, thus the total score should not be used to compare sites against one another. In addition, not all businesses require a site which performs well on all these criteria, for example meeting rural/local needs.
- 9.11 The assessment provided and the recommended site portfolio in the following sections is presented on a “*without prejudice*” basis as evidence to inform the preparation of Wyre’s Local Plan. It does not constitute Council policy, and

future employment allocations will be determined through the formal consultation process as part of the Local Plan.

- 9.12 Following a short discussion of the influence of location on commercial investment decisions, the following sections of this Chapter consider the existing sites and outstanding allocations/commitments in the Borough's main employment areas, with potential sites assessed in Chapter 10.0.

Location

- 9.13 Within Wyre our assessment of take-up provides evidence that demand for general employment purposes has been strong in those locations that are relatively well connected to the strategic highway network. Poulton Industrial Estate which is on the edge of the Blackpool conurbation has access to junction 3 of the M55 via the A585 trunk road. This route involves more than 10 km of single carriageway road but it largely avoids settlements. Similarly at the eastern side of the Borough there has been development activity in the A6 corridor. The A6, which serves Garstang and Catterall, runs parallel to the M6 and links to it via junctions 32 and 33. Though the A6 passes through some small settlements there are faster stretches of single-carriageway road between them. Hillhouse Secure Site is the third location where development has been focussed, although this has less to do with location than the advantages to some manufacturers, requiring large sites, of infrastructure left behind by ICI.

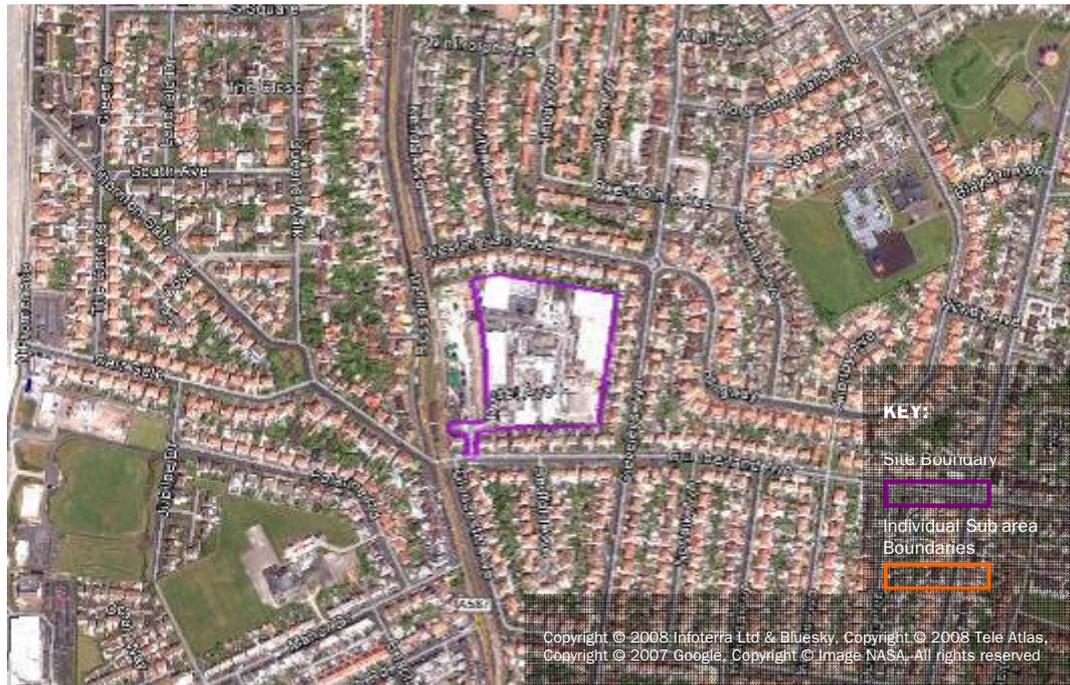
Overview of Existing Site Areas and Allocations

WY01: Dorset Avenue, Cleveleys

Overview

- 9.14 This established employment area of 2.24 ha contains a range of units including the Cleveleys Business Centre, the earliest of which date from the 1950s. From a market perspective, it is effectively located within the Blackpool conurbation, close to Cleveleys Town Centre, and has housing to three sides.
- 9.15 Access to the estate is from Cumberland Avenue. Bus and tram stops are situated close to the entrance of the estate. Access to the strategic highway network is poor.
- 9.16 The estate is intensively developed and there are no available development plots. The estate infrastructure is of average quality and circulation is restricted by on-street parking. Vacancy rates are modest, whilst occupiers are principally local businesses. There are no available employment land allocations within this employment area. Land adjoining the western edge of the estate is operational land in connection with the tramway. It is understood that this land would be required for this purpose for the foreseeable future.

Figure 9.1 Boundary of Existing Dorset Avenue Site



Employment Area Summary

- 9.17 **It is recommended that the Dorset Avenue estate in Cleveleys retains its employment land protection in planning policy terms. Improvements to some units and infrastructure would support the continued operation of the area. Land to the west of the site comprises operational land in connection with the tramway and should be retained for this purpose.**

WY02: St George's Lane, Cleveleys

Overview

- 9.18 This back-street employment area of 0.46 hectares mainly comprises small pre-war workshops. Again, from a market perspective, it is effectively located within the Blackpool conurbation, on the edge of Cleveleys Town Centre and adjoins housing and commercial uses.
- 9.19 Access to the estate is from St George's Avenue. Bus and tram stops are situated close by. Access to the strategic highway network is poor.
- 9.20 The estate is intensively developed and there are no available development plots. Estate infrastructure is of poor quality and circulation is difficult as St. George's Lane is a narrow back street that has been stopped-up at one end.
- 9.21 There are no vacant units. Occupiers are principally local businesses including car workshops. There are no available employment land allocations within this employment area. Although this is a small employment area it is evidently a popular location for small businesses requiring affordable accommodation.

Figure 9.2 Boundary of Existing St George's Lane Site



Employment Area Summary

- 9.22 **It is recommended that the estate retains its employment land protection in planning policy terms.**

WY03: Norcross, Thornton

Overview

- 9.23 This established employment area of 15.45 hectares comprises an office complex owned by Telereal Trillium which is let to the Department for Work & Pensions. Offices are occupied by DWP and SPVA; a modern printing facility in the centre of the site is sublet to Hewlett Packard. The office buildings are mainly pre-war with additional blocks developed in 1978, 1989 & 1991. Norcross is situated within the Blackpool conurbation, to the south & east the site adjoins a wedge of Green Belt that separates Cleveleys from Thornton and to the west is housing. The boundary of Wyre and Blackpool is immediately to the west of the site.
- 9.24 Access to the estate is from Norcross Lane. Bus stops are situated close to the entrance of the estate. Access to the strategic highway network is poor.
- 9.25 The estate is intensively developed and there are no available development plots. Estate infrastructure is of good quality and there is a good provision of car parking areas.
- 9.26 The Department for Work and Pensions is to vacate by summer 2013 and to relocate staff elsewhere on the Fylde Coast. Having regard to the scale of Norcross it is important that the site features in the assessment of availability,

even though it is not currently available. We understand that at this stage neither Hewlett Packard nor the Service Personnel & Veterans Agency have indicated that they are to vacate Norcross. The relocation of DWP will leave around two-thirds of the site vacant. It has therefore been assumed that the existing road layout will be retained to maintain access to these buildings.

9.27 In assessing available land we have subdivided those parts of the site currently occupied by DWP into six development plots as shown on Figure 9.3:

Figure 9.3 Boundary of Existing Norcross Site and Sub-Division



Norcross Viability Assessment

9.28 As noted above, although largely occupied by DWP, it is understood that buildings occupied by Hewlett Packard and the Service Personnel & Veterans Agency will be retained after DWP have relocated. It has therefore been assumed that DWP’s offices could be redeveloped to provide new office floorspace, and that those redevelopment plots which are served by existing roads and utilities would not require infrastructure provision. This appraisal therefore considers the viability of developing new office accommodation in this location. Likely items of abnormal cost relating to site clearance and remediation have also been identified.

9.29 Any consideration of the viability of redeveloping offices at Norcross must be prefaced with the caveat that the office market in Wyre is weak, values are low and that speculative development did not occur in or around Thornton even at the top of the market. Such favourable conditions for development are unlikely to return during the plan period. However, Blackpool’s requirement for employment land which cannot be accommodated within its boundaries strengthens the case for the retention of Norcross for employment purposes.

9.30 The ODPM ‘Brown Book’ identifies plot ratios for business parks of 25% to 40%. We have assumed that by retaining the existing road infrastructure a

higher density of development could be achieved on each of the six development plots. We have therefore applied a 40% plot ratio to the net site area of 10ha. This gives an estimated gross floorspace capacity of around 40,000 sq m (although new business park developments would typically have a more generous provision of landscaping and parking with a two-storey rather than the current single-storey arrangement; thus the capacity of the site could be increased). Having regard to the total capacity of the site and to the historically low demand for office space within the Borough, it is perhaps more helpful to consider the viability of developing out an individual plot. Our appraisal considers the development of a 1.8 ha development plot with capacity for gross floorspace of 7,200 sq m.

- 9.31 In current economic circumstances development finance is very difficult to source, and it is our experience that banks will only provide funding for development schemes that show a profit on cost of 20% or more. It is difficult to say when 'fundable' profit levels will return to, say, 15%.
- 9.32 Falling rents, longer letting periods and greater tenant incentives also undermine the viability of speculative office and industrial development schemes. How long these conditions will persist is uncertain. We have therefore tested the viability of office development in market conditions more conducive to property development and on the assumption that the market will return to 'normal' conditions during the plan period. Our rents, yields, finance rates, letting periods and rent free periods reflect those prevailing in the relatively stable market conditions that preceded the unsustainable peak of the market and the subsequent recession. Our site purchase price is based on the value of serviced employment land in this location (c. £150,000 / ha). No allowance has been made for empty rates liabilities.
- 9.33 The appraisal (see Appendix 3) demonstrates that **a speculative office scheme could not be developed profitably even before abnormal costs of demolition and site clearance are included**. We estimate that even the redevelopment of just one of the Blocks at Norcross would make a loss of over £500,000 and gap funding of around £2 million would be required to produce a 20% profit on cost and to allow the scheme to proceed.
- 9.34 Before development, sites would need to be cleared. We understand that the DWP accommodation comprises around 30,500 sq m of net floorspace, and, given its age, asbestos is likely to be present. An accurate cost of demolition would require a detailed asbestos survey and quotations from contractors, but we would expect these abnormal costs in preparing all the DWP blocks for redevelopment to amount to several million pounds. This would compound the requirement for funding.
- 9.35 Viability can be improved by generating higher values and reducing costs. Revenues could be increased through allowing a mix of uses to be developed at Norcross. To provide some indication of the relative amount of cross subsidy required, we have considered the profitability of housing development on a 1.8ha plot, representing the approximate size of one of the blocks.

- 9.36 For the purpose of our appraisal we have used the modern housing estate to the west of the Norcross complex as a guide to appropriate densities, house sizes, types etc. in this part of Thornton-Cleveleys. We have also had regard to asking prices on new housing developments in the locality (Hawley Gardens & Fleetwood Harbour Village). We have not made any allowance for the cost of asbestos removal or abnormal costs. Nor have we factored in any affordable housing provision or other Section 106 contributions.
- 9.37 The appraisal suggests that on this basis housing development is viable and that a housebuilder could afford to pay around £3 million for a 1.8ha site (which equates to around £680,000 per acre). This would provide the landowner with some capacity to cross subsidise office development.
- 9.38 The relative proportion of the site that would need to be developed for housing to support the provision of office space will to some extent depend upon the Council's own requirements for affordable housing and other Section 106 items. Economic development needs will therefore need to be weighed against other potential planning gain from the scheme. As well as considering viability, a mixed-use scheme will need to have regard to the compatibility of adjoining uses and other planning issues. This has influenced the site specific recommendations for mixed use with/without employment in Table 9.1.
- 9.39 Our qualitative assessment rates the sites of Block 4 and 6 as being slightly less suitable for continued employment use as they adjoin housing and are relatively distant from public transport connections. Thus although Norcross as a whole should be considered for mixed-use with an employment component, the case for retaining an employment component is weaker for these two sites. However, given the proximity of Block 6 to residential areas, it is considered that this would be most suitable to reallocate in its entirety to non B-class uses.
- 9.40 The overall mix of uses should be informed by discussions with Blackpool Council regarding its shortage of employment land and the extent to which more sites for office development are required, and the pressure to accommodate non-employment uses in Wyre. On the evidence of this ELR the case for retaining employment land in this location is weak, as redevelopment for employment use alone would not be viable without gap funding. It is considered that a 50:50 split of B1a to residential use on 5 of the 6 sites would be appropriate, with the remaining site (Block 6) suitable for residential use in its entirety.

Table 9.1 Employment Sites Appraised in the Norcross Employment Area

Site Reference and Name	Site Status and Planning Designation	Gross Site area, in hectares (Net area in brackets)	Total Ranking	Recommendations
WY/03/01: Block 1 & Robinson House	Existing (to be fully vacated by Summer 2013)	1.93 (1.83)	27	Mixed-use with employment (50:50 split)
WY/03/02: Block 2 & parking	Existing (to be fully vacated by Summer 2013)	1.93 (1.83)	27	Mixed-use with employment (50:50 split)
WY/03/03: Block 3	Existing (to be fully vacated by Summer 2013)	1.60 (1.52)	27	Mixed-use with employment (50:50 split)
WY/03/04: Blocks 4 & 7	Existing (to be fully vacated by Summer 2013)	1.87 (1.78)	24	Mixed-use with employment (50:50 split)
WY/03/05: Block 5 & Canteen	Existing (to be fully vacated by Summer 2013)	2.27 (2.16)	27	Mixed-use with employment (50:50 split)
WY/03/06: Block 6	Existing (to be fully vacated by Summer 2013)	0.90 (0.86)	24	Mixed use without employment

Note: the total revised net area of the mixed use element of the five sites to be retained would therefore total 9.12ha, of which B-class employment uses could total half of this, i.e. 4.56ha.

9.41

As new office development is unlikely to be viable during the plan period, consideration should be given to retention and refurbishment options. Refurbishment costs can be substantially lower than construction costs and abnormal costs of demolition and site clearance can be avoided. The scale of the Norcross complex, the age and condition of many of the buildings, and the high holding costs once DWP vacate (e.g. security, maintenance, empty rates liability etc.) all make a selective approach to retention and refurbishment necessary. We recommend internal inspections of the buildings to determine the practicality of subdivision and the relative costs of refurbishment before deciding whether blocks are suitable for retention. Having regard to the current state of the market, low levels of demand and rent may make even refurbishment options of marginal viability at the present time, but the losses and holding costs of a refurbished office block should be compared with those of new development at Norcross or elsewhere.

Employment Area Summary

9.42

It is recommended that following DWP's relocation, the wider Norcross site be allocated for a mixed-use redevelopment that incorporates an employment

component equal to around half the remaining net developable area and that Tomlinson House and the HP print facility are retained.

WY04: Hillhouse Secure Site, Thornton

Overview

- 9.43 The former ICI chemical complex comprises an extensive employment area of 104 hectares on the west bank of the estuary of the River Wyre on the edge of the conurbation and to the north of Thornton. The site is owned by NPL Estates and accommodates around forty businesses in a range of premises including modern purpose built manufacturing complexes, pre-war offices and workshops, and depots. The site adjoins housing to the south. To the west, on the opposite side of a disused railway line, is Red Marsh Industrial Estate.
- 9.44 Access to the site is from Bourne Road where a security gatehouse monitors traffic to and from the estate. The closest bus stop is more than 500 metres from the site entrance. Access to the strategic highway network is poor.
- 9.45 The site has extensive areas of derelict land some of which are earmarked for particular projects such as a Power Station and an Anaerobic Digester and others which may be held for the expansion of existing occupiers. There are substantial areas of vacant and underused land throughout the estate. The exact area of available land is difficult to identify. The difficulty of accurately identifying the extent and status of individual plots from site inspections has resulted in a discrepancy between our calculation of available land and the Council's.
- 9.46 Sites are identified for energy generation facilities and the northern tip of the site is identified as a possible housing site in the Fleetwood-Thornton AAP, restoration of land for use as a country park has also been proposed. Estate infrastructure is of poor quality but circulation within the estate is good.
- 9.47 As well as large areas of undeveloped land there are some vacant premises within the estate. There are a range of businesses on site including large scale manufacturing complexes such as Victrex, Vinnolit and Asahi Glass & Chemicals Europe.
- 9.48 Figure 9.4 and Table 9.2 indicate that the site has around 47.53 ha gross, or 43.15ha net, of land currently identified as a Strategic Location for Development. Clearly, the site as a whole remains a key strategic employment site for the Borough and should be retained and supported by planning policy. However, as can be seen from Table 9.2, given the proposed uses for various parts of the site it is considered that it would be more appropriate to separate out various elements of the site from the overall employment land portfolio. This would specifically comprise the parts of the site likely to be used for Sui Generis uses (such as the proposed Wyre Power station site and the Anaerobic

digester¹⁶), with the remainder specifically allocated for employment use with the intention of attracting advanced manufacturing companies to the area.

9.49

The lagoons and adjoining land at the north end of the site WY/04/08 are peripheral and could be deallocated from the portfolio.

Figure 9.4 Boundary of Existing Hillhouse Secure Site and Sub-Division



Table 9.2 Employment Sites Appraised in the Hillhouse Secure Site

Site Reference and Name	Site Status and Planning Designation	Gross Site area, in hectares (Net area in brackets)	Total Ranking	Recommendations
WY/04/01: Proposed Wyre Power	Strategic Location for Development	12.31 (12.31)	25	Energy Generation
WY/04/02: Proposed Aneorobic Digester	Strategic Location for Development	1.19 (1.19)	24	Energy Generation
WY/04/03: East Road	Strategic Location for Development	2.23 (2.23)	23	Allocate for Employment Use
WY/04/04: South Road fronting Vinollit	Strategic Location for Development	0.94 (0.94)	24	Allocate for Employment Use

¹⁶ Note: these two sites are recommended for re-allocation to energy generating uses on the grounds that proposals for these uses are relatively well advanced through the planning process. Were these sites not to come forward as anticipated in future, it may be appropriate to include them within the Borough's employment land portfolio once more.

Site Reference and Name	Site Status and Planning Designation	Gross Site area, in hectares (Net area in brackets)	Total Ranking	Recommendations
WY/04/05: South Road adjoining new substation	Strategic Location for Development	0.67 (0.67)	23	Allocate for Employment Use
WY/04/06: Riverside Business Park	Strategic Location for Development	13.26 (11.27)	25	Allocate for Employment Use
WY/04/07: South Road / Central Road	Strategic Location for Development	1.01 (1.01)	24	Allocate for Employment Use
WY/04/08: Lagoons & land at North of Site	Strategic Location for Development	15.92 (13.53)	22	Deallocate

Employment Area Summary

- 9.50 **The redevelopment of the estate, though slow, is continuing and it is recommended that the estate is largely retained as an employment area that is reserved for large scale manufacturing processes and energy generation. The northernmost part of the site should be deallocated.**

WY05: Lancashire Waste Technology Park, Thornton

Overview

- 9.51 The waste technology park was developed in 2010 on 13.3 ha of land to the east of Fleetwood Road North. It is situated on the eastern edge of the conurbation between Thornton and Fleetwood. To the west is Burn Hall Industrial Estate and to the south housing is being developed on brownfield former industrial land.
- 9.52 Access to the park is via a new spur road off Fleetwood Road North, which is a bus route though the nearest stop is at the entrance to Burn Hall Industrial Estate. Access to the strategic highway network is poor.
- 9.53 The estate is intensively developed and there are no available development plots, although brownfield land either side of the spur road and fronting Fleetwood Road North (sites WY/06/04 and WY/06/05 in Table 9.3) is allocated for employment use and could accommodate an expansion of the Park. Estate infrastructure is of good quality, access is controlled from a gatehouse at the entrance; circulation within the park is good. Both the sites on the approach to the park rated highly in the appraisal process and it is considered that both sites should be retained as employment allocations in the Local Plan, notwithstanding an oversupply of employment land in the Thornton / Fleetwood area.

9.54

It is important to note that a planning application (ref: 12/00200/LMA) has been submitted for a 50,000 sqft (net sales) Sainsbury’s foodstore and associated car parking and landscaping on site WY/06/05; the application also includes proposals for a Petrol Filling Station on the south-western corner of site WY/06/04. Without wishing to prejudge the outcome, should planning permission be granted for this development, this would impact upon the total employment land portfolio of the Borough, which should be a material consideration in any decision.

Figure 9.5 Boundary of Existing Lancashire Waste Technology Park and Remaining Allocations



Table 9.3 Employment Sites Appraised in the Lancashire Waste Technology Park

Site Reference and Name	Site Status and Planning Designation	Gross Site area, in hectares (Net area in brackets)	Total Ranking	Recommendations
WY/06/04: North of Estate Road	Allocated	1.70 (1.53)	32	Retain as an Employment Allocation
WY/06/05: South of Estate Road	Allocated	4.52 (4.07)	31	Allocation

Employment Area Summary

9.55

It is recommended that the estate retains its employment land protection in planning policy terms, whilst recognising the current proposals for food retail and associated uses on all of WY/06/05 and part of WY/06/04. Land to the west of the site could accommodate the future extension of the estate or accommodate other employment uses.

WY06: Burn Hall Industrial Estate, Thornton

Overview

- 9.56 This established industrial estate of 7.20 hectares accommodates various local businesses in buildings dating from the 1940s to 1970s. Jarden Applied Materials occupies a modern building to the south of the entrance. The estate is situated on the eastern edge of the conurbation between Thornton and Fleetwood. To the east is the Waste Technology Park and to the North is a caravan park.
- 9.57 Access to the estate is from Fleetwood Road North, where there are bus stops at the entrance to the Estate. Access to the strategic highway network is poor.
- 9.58 The central part of the estate is developed but land to the north and south comprises cleared brownfield plots for redevelopment (Figure 9.6 and Table 9.4). Estate infrastructure is of average quality and circulation is restricted by on-street parking, although in general the sites scored reasonably well in the appraisal process. The site is allocated for employment development in the Fleetwood-Thornton AAP (Policy 3). In line with this, Policy CS4 of the emerging Wyre Core Strategy seeks to retain and protect the site for employment purposes.
- 9.59 Vacant buildings have been demolished and the remaining premises are fully occupied. Occupiers are principally local businesses.
- 9.60 It is considered that the three remaining developable plots, which are integral to the estate and adjoin other employment uses, should retain their current employment land allocation.

Figure 9.6 Boundary of Existing Burn Hall Industrial Estate and Allocations Within



Table 9.4 Allocated Employment Sites Appraised in the Burn Hall Industrial Estate

Site Reference and Name	Site Status and Planning Designation	Gross Site area, in hectares (Net area in brackets)	Total Ranking	Recommendations
WY/06/01: Venture Road	Strategic Location for Development	1.79 (1.61)	27	Retain as an Employment Allocation
WY/06/02: Enterprise Way	Strategic Location for Development	0.14 (0.14)	29	Retain as an Employment Allocation
WY/06/03: South East corner	Strategic Location for Development	0.79 (0.71)	27	Retain as an Employment Allocation

Employment Area Summary

- 9.61 **It is recommended that the estate should retain its employment land protection in planning policy terms and that the three remaining developable sites remain allocated for employment land purposes. Improvements to some units and infrastructure would support the continued operation of the area.**

WY07: Red Marsh Industrial Estate, Thornton

Overview

- 9.62 This established industrial estate of 16.4 hectares accommodates various local businesses in buildings dating from the 1940s to the present day. The estate is situated on the eastern edge of the conurbation on the north side of Thornton. To the east is the Hillhouse Secure Site and to the south and west are housing areas.
- 9.63 There are accesses to the estate via Heys Street and Holly Road which pass through residential areas. Bus stops are located on Trunnah Road to the southwest of the Estate. Access to the strategic highway network is poor. Estate infrastructure is of average quality and circulation is restricted by on-street parking.
- 9.64 The estate is intensively developed. There is one small vacant storage depot available at the northern end of the estate. A rectangle of grass in the south west corner, fronting Hargreaves Street, is also undeveloped. Along the west side of the estate are schools. The Fleetwood-Thornton AAP, which post-dates the Local Plan, allocates the entire area for employment development. In line with this, Policy CS4 of the emerging Wyre Core Strategy seeks to retain and protect the site for employment purposes.
- 9.65 The AAP Proposals Map therefore shows the employment area as extending to the west to include what are currently schools (WY/07/03 and WY/07/04) an allotment (WY/07/05) and open space fronting Hargreaves Street. It has been assumed that the schools and the land around them would not be available for

the development of employment premises and they should be deallocated. A plot of land fronting Hargreaves Street is also included (WY/07/02).

9.66 The Industrial Estate also benefits from 3 extant planning permissions for a total of 2,000 sq m. of additional B1, B2 and B8 floorspace. The northern part of the estate has high levels of occupancy but the southern part has vacancy rates of around 20%. Occupiers are principally local businesses. Some of these premises are likely to be reoccupied, whilst others may provide redevelopment opportunities.

9.67 Red Marsh is an established industrial estate serving Thornton. Unlike Hillhouse, it meets general employment needs and provides a range of small and medium sized units that meet the needs of local businesses. It is intensively developed but it is considered that having regard to the large amounts of available employment land elsewhere in the sub-area, its expansion could not be justified. Redevelopment of older units could provide an appropriate level of future sites.

Figure 9.7 Boundary of Existing Red Marsh Industrial Estate and Sub-Division



Table 9.5 Employment Sites Appraised in the Red Marsh Industrial Estate

Site Reference and Name	Site Status and Planning Designation	Gross Site area, in hectares (Net area in brackets)	Total Ranking	Recommendations
WY/07/01: Butts Road	Allocated	0.21 (0.21)	27	Retain as an Employment Allocation
WY/07/02: Hargreaves Street	Allocated	0.69 (0.62)	25	Deallocate
WY/07/03: Thornton Primary School	Allocated	1.98 (1.98)	22	Deallocate
WY/07/04: Special Needs Schools	Allocated	2.47 (2.47)	22	Deallocate
WY/07/05: Allotments	Allocated	0.39 (0.39)	21	Deallocate

Employment Area Summary

- 9.68 **It is recommended that the estate should retain its employment land protection in planning policy terms. Improvements to units and infrastructure would support the continued operation of the area. Redevelopment of older units should be encouraged. Part or all of the land fronting Hargreaves Street should be excluded from the estate as it serves as a buffer between the estate and residential properties and comprises local open space (WY/07/02). The western boundary of the estate should be redefined to exclude the school grounds and allotments (WY/07/03, 04 and 05), which should be deallocated from the portfolio.**

WY08: Copse Road, Fleetwood

Overview

- 9.69 This long-established industrial area stretches from the edge of Fleetwood Town Centre to the southern edge of the town. The area is bounded by Copse Road and the tramline to the west and the A585 Amounderness Way to the east, with Fleetwood Docks beyond. As such it does not immediately adjoin housing areas. In total, Copse Road encompasses 31 ha.
- 9.70 Access to the area is via Copse Road where there are bus and tram stops. The A585 is the main road to Fleetwood town centre and the Docks which avoids residential areas. Access to the strategic highway network is poor.
- 9.71 In general terms, Copse Road is predominantly undesignated, although there are some existing employment land allocations (EMP2/4 and EMP2/3 within the estate, and EMP2/4 located immediately beyond its boundaries to the southwest) in the Wyre Local Plan. Policy CS3 of the emerging Wyre Core Strategy also seeks to retain and protect this area for employment purposes.
- 9.72 The character of the area is diverse. At the northern end where it adjoins the town centre, Siding Road serves a pre-war intensively developed area where the

building stock, infrastructure and circulation is poor. The central section is dominated by a large cleared brownfield site. The Council is redeveloping a works depot on the northern edge and there has been some recent development of new industrial buildings to the south where it fronts Denham Way, but the Fish Processing Park that has been proposed on the central section has not proceeded. To the south of Denham Way, Copse View Business Park provides modern units and to the south of this are large factories occupied by Fisherman' Friends and HTI. The southern end of the industrial area comprises smaller units and a new car showroom has been developed on the corner of Copse Road and the A585.

Figure 9.8 Boundary of Existing Copse Road Industrial Area and Sub-Division



- 9.73 This industrial area is generally well occupied but there are pockets of vacancies particularly at Copse View. A wide range of businesses are accommodated these include clusters of fish processing businesses, vehicle repair and salvage and scrap.
- 9.74 Our quantitative analysis identifies an oversupply of employment land within Fleetwood, although as a continuous employment area with clear boundaries and separated from other uses, the reallocation of land at Copse Road would not be appropriate. There is some limited scope to re-designate land at the northern periphery of the area (just as at the southern tip a car showroom has recently been permitted), but elsewhere the estate should retain its employment designation.
- 9.75 Site WY/08/05, to the west of Copse Road, has extant planning permission (08/01174/FUL) for three industrial units. It is understood that development on the site has now commenced, hence this should remain within the portfolio of employment land.

Table 9.6 Allocated Employment Sites Appraised in the Copse Road Industrial Area

Site Reference and Name	Site Status and Planning Designation	Gross Site area, in hectares (Net area in brackets)	Total Ranking	Recommendations
WY/08/01: North end of Siding Road	Vacant land within existing employment area	0.30 (0.30)*	27	Mixed-use with employment
WY/08/02: South of Council Depot	Vacant land within existing employment area	2.35 (2.00)	24	Allocate for Employment Use
WY/08/03: East of Copse Road Builders Yard	Vacant land within existing employment area	0.36 (0.32)	24	Allocate for Employment Use
WY/08/04: Depot, Copse Road	Vacant land within existing employment area	0.23 (0.23)	30	Allocate for Employment Use
WY/08/05: West of Copse Road	Allocated	0.89 (0.71)	30	Retain as an Employment Allocation
WY/08/06: Off Denham Way	Allocated	0.25 (0.25)	30	Retain as an Employment Allocation

*Of which around two-thirds, or 0.2ha, could be expected to go for B-class employment uses

Employment Area Summary

- 9.76 **It is recommended that the estate retains its employment land protection in planning policy terms. The regeneration of the northern part of the site (WY/08/01 in Table 9.6) could accommodate other commercial uses, and lead to a redrawing of the boundary. Having regard to surrounding uses B-class employment remains the most suitable form of development in the centre of the estate and these sites should be retained for employment use.**

WY09: Hesketh House, Broadway

Overview

- 9.77 Hesketh House is an office block occupied by the NHS Pensions Agency, with an ancillary data centre and extensive car parking to the rear. It is situated in the south western suburbs of Fleetwood. To the north is a secondary school, but otherwise the site adjoins housing.
- 9.78 The site fronts the A587 Broadway which connects Cleveleys to the western part of Fleetwood. There are bus stops on Broadway immediately to the front of the site. There are no available employment land sites within the site boundary.
- 9.79 Lawns to the front of Hesketh House could potentially accommodate on-site expansion requirements of the existing occupier if required. The site presently sustains a high level of employment and thus should be retained as an

employment site. If it were to be vacated, appropriate marketing of the buildings and site for employment purposes should be undertaken.



Employment Area Summary

- 9.80 **It is recommended that Hesketh House retains its employment land protection in planning policy terms. If the building were to become vacant, there would be very limited demand for offices of this size in this location and it is unlikely to be reoccupied.**

WY10: Port of Fleetwood

Overview

- 9.81 The Port is owned by Associated British Ports [ABP] and comprises a ferry terminal at the mouth of the estuary and two linked docks to the south. The ferry terminal is now separated from the docks by modern housing and the Freeport factory outlet centre. The docks are now predominantly used as a marina. The ferry terminal comprises 7 ha on the eastern edge of Fleetwood town centre and adjoins a mixed commercial and residential area. The area around the docks, comprising 21.3 ha, fronts the A585 to the west of which is the Copse Road industrial area. New housing is being developed to the south east of the docks.
- 9.82 Access to the Docks is from the A585 Amounderness Way. Within the town centre this becomes Dock Street from which the ferry terminal is accessed. There are bus stops on Dock Street but the Docks are poorly served by public transport.

Figure 9.9 Boundary of Existing Port of Fleetwood and Allocated sites within



- 9.83 Activity at the Port has declined dramatically with the demise of the fishing industry and more recently the axing of Stena Line's ferry service to Northern Ireland. There are large areas of surplus land available for redevelopment. The Fleetwood-Thornton AAP allocates land around the Docks for employment, mixed-use and housing development (Table 9.7).
- 9.84 The quality of the sites available within the estate varies, as can be seen from the highly variable scoring in Table 9.7. New road infrastructure provides access to the housing development and serves development plots at the entrance to the estate and a large area of brownfield land to the south. However, on the southern edge of the Fish Dock, the area around Herring Arm Road is dominated by poor quality premises.
- 9.85 It is considered that the boundaries of allocations to the south of the docks require review following the completion of new road infrastructure. We have used the latest Ordnance Survey mapping data to re-assess the areas of land available for development. Some of the land at the Port is allocated in the Fleetwood-Thornton AAP for mixed-use development. Within this mixed-use area are three sites that are currently available – sites WY/10/02, 04 and 05 in the Table. From discussions with ABP it is understood that another is identified for the development of a pumping station (site WY/10/04) and that because of their locations non-employment uses are more appropriate for the other two.
- 9.86 The ODPM Guidance Note recommends that, where sites are identified for mixed-use, their employment component is estimated. For each of these three sites we have assumed that there will be no employment component. The net areas of these sites are shown in Table 9.7 as nil.

Table 9.7 Allocated Employment Sites Appraised at the Port of Fleetwood

Site Reference and Name	Site Status and Planning Designation	Gross Site area, in hectares (Net area in brackets)	Total Ranking	Recommendations
WY/10/01: East of Dock Street	Vacant land within existing employment area	7.06 (6.00)	33	Port Related Use
WY/10/02: West of Dock Avenue (m-u)	Allocated for Mixed Use	0.90 (0.00)	31	Mixed use without employment
WY/10/03: West of Dock Avenue (Fylde Ice)	Allocated for employment use	1.39 (1.25)	32	Employment - Expansion Land
WY/10/04: East of Herring Arm Road (Haylite)	Allocated for Mixed Use	1.06 (0.00)	21	Mixed use without employment
WY/10/05: West end of Herring Arm Road (m-u)	Allocated for Mixed Use (partly allocated for employment use to the south)	0.77 (0.00)	27	Mixed use without employment
WY/10/06: South of new road	Partly allocated for employment	9.13 (7.76)*	25	Mixed-use with employment

*Of which around two-thirds, or 5.17ha, could be expected to go for B-class employment uses

Employment Area Summary

9.87

It is recommended that the ferry terminal (site WY/10/01) is retained for Port-related uses. This is the most attractive site for Port / Maritime sectors in the Borough, as it has deep water frontage and no lock gates. ABP is keen that it is retained. It is further recommended that the area to the west of the Fish Dock (site WY/10/03) be retained for employment (albeit as expansion land for the existing Fylde Ice facility immediately adjoining the site to the east). The large triangle of brownfield land to the south of the entrance lacks suitable utilities and infrastructure (site WY/10/06) provision; it is allocated for employment, although having regard to the oversupply of employment land in the Borough generally, reallocating around a third of this site for alternative uses should be considered. Land to the south side of the Fish Dock is identified in the AAP for mixed-use, which could potentially include B-class uses. However, due to limited residual demand for employment uses in this wider area, it is suggested that sites WY/10/02, 04 and 05 should not include an employment component.

WY11: Poulton Industrial Estate, Poulton-le-Fylde

Overview

9.88

This established industrial estate of 35.1 ha is situated on the eastern edge of Poulton-le-Fylde, on the edge of the Blackpool conurbation. To the west, a railway line separates the estate from housing areas whilst to the south and east are open fields. A line of houses and a cemetery adjoin the northern boundary of the estate.

- 9.89 The estate is accessed from the A586 Garstang Road which links Blackpool and Poulton-le-Fylde. There are two entrances to the estate and bus stops are located near to these. Access to the strategic highway network is poor, but the A586 links to the A585 and thence to the M55; these single carriageway roads avoid built up areas. As a result, Poulton Industrial Estate is relatively well connected to the motorway network when compared with other estates in the Borough.
- 9.90 Several pockets of land within the estate are allocated for employment land (EMP2/7, EMP2/8, EMP2/9, EMP2/10, EMP2/11 and EMP2/12) in the Wyre Local Plan, with the remainder of the site having no formal designation. Policies CS1 and CS6 of the emerging Wyre Core Strategy seek to retain and protect this area for employment purposes.

Figure 9.10 Boundary of Existing Poulton Industrial Estate and Allocated sites within



- 9.91 The estate is intensively developed and provides a wide range of unit sizes. Some redevelopment has occurred over the last decade. There are a handful of development plots available as illustrated in Table 9.8, whilst other opportunities for redevelopment can be expected in future. Estate infrastructure is generally of average quality but in some parts circulation is restricted by on-street parking. The estate road network is also poor in parts with dead ends and twisting roads making it hard to navigate.
- 9.92 There are vacant units throughout the estate, and it is estimated that overall the vacancy rate is around 15%. Occupiers include local and national businesses. In general, the estate is popular and well occupied and should be retained and protected by policy where appropriate.
- 9.93 Site WY/11/01 west of Premier Way is a vacant, unallocated piece of land within the estate. However, it is understood that a planning application (ref:

10/00533/FUL) has recently been submitted to extend the adjoining leisure centre which, although not on this site, would involve the reconfiguration of the car park area across WY/11/01. As such, the site is unlikely to come forward for employment land.

Table 9.8 Allocated Employment Sites Appraised at the Poulton Industrial Estate

Site Reference and Name	Site Status and Planning Designation	Gross Site area, in hectares (Net area in brackets)	Total Ranking	Recommendations
WY/11/01: West of Premier Way	Vacant Land within existing employment area	0.20 (0.20)	35	Do not allocate
WY/11/02: West of Aldon Road	Allocated for employment	0.61 (0.55)	30	Retain as an Employment Allocation
WY/11/03: East of Aldon Road	Allocated for employment	0.37 (0.37)	30	
WY/11/04: North of Furness Drive	Allocated for employment	0.25 (0.25)	30	

Employment Area Summary

9.94 **It is recommended that the estate is retained as an employment area and that all three remaining allocations retain their employment land protection. The vacant land at site WY/11/01 should not be allocated for employment uses due to the likelihood that it will be used as car parking for the adjoining leisure centre, which has submitted plans to expand its current operations. Improvements to units and infrastructure would support the continued operation of the area. Redevelopment of older units should be encouraged. Watercourses and associated flood zones to the south & east comprise significant barriers to the extension of the estate, as does the proximity of the Fylde Local Authority boundary.**

WY12: Robson Way, Carleton

Overview

9.95 This site comprises the north-eastern end of a long-established employment area that straddles the boundary of Blackpool and Wyre districts. The industrial area is bounded by a railway line to the north-west and housing to the south-east. The part of the area within Wyre extends to 3.6 hectares. The site has no formal designation in the Wyre Local Plan. However, Policies CS1 and CS6 of the emerging Wyre Core Strategy seek to retain and protect this area for employment purposes.

9.96 This site has access from Blackpool Old Road, via Robson Way to the south and an unnamed road to the north. There are houses between the industrial area and the Blackpool Old Road. Buses run along Blackpool Old Road and

there are bus stops close to the entrance to the estate. At the western end of the industrial area is Layton railway station. Access to the strategic highway network is poor.

9.97

The estate is poorly laid out and estate roads do not allow access all the way through the estate. The part of the estate in Wyre can only be accessed from the east. Here the buildings and infrastructure are of poor quality. However, land formerly used for external storage (site WY/12/01 in Table 9.9) is now vacant and could accommodate new development. Having regard to the shortage of employment land in Blackpool it is recommended that the Councils work together to rationalise and upgrade this employment area to release its full potential.

Figure 9.11 Boundary of Existing Robson Way Industrial Estate



Table 9.9 Allocated Employment Sites Appraised at the Robson Way Industrial Estate

Site Reference and Name	Site Status and Planning Designation	Gross Site area, in hectares (Net area in brackets)	Total Ranking	Recommendations
WY/12/01: North West Corner of Robson Way	Vacant land within existing employment site	1.06 (0.95)	24	Retain as an Employment Site, with vacant land allocated for employment use

Employment Area Summary

9.98

It is recommended that the estate retains its employment land protection in planning policy terms. Improvements to units and infrastructure would support the continued operation of the area. Improvements to the legibility of

the Estate and the improvement of the estate roads should be a priority. It is considered that the vacant land at site WY/12/01 could be exploited more intensively for employment uses and could be allocated for that purpose.

WY13: Windsor Castle Works, Poulton-le-Fylde

Overview

- 9.99 This is a small historic industrial area on the north-east side of Poulton. The site fronts Station Road and backs onto a long-disused railway line. Residential areas adjoin to the south and west. The southern part of the employment area is known as Windsor Castle Works, now subdivided to provide workshops on a site of 0.6 ha. To the north, other industrial buildings have now been cleared (site WY/13/02 in Table 9.10). The line of the railway provides a strip of undeveloped land to the rear currently allocated for employment use in the Local Plan (site WY/13/01 in Figure 9.12).
- 9.100 Access from the south is through predominantly residential areas and visibility is restricted as the road crosses the railway line. There is a bus stop on Station Road. Access to the strategic highway network is poor.
- 9.101 Windsor Castle Works is reasonably well occupied and serves small, local businesses that require low cost space. However, this has now become a relatively isolated employment area that has contracted over the decades and there is little prospect of new employment development coming forward. The area is predominantly residential and the redevelopment of the vacant sites for employment could give rise to amenity issues.

Figure 9.12 Boundary of Existing Windsor Castle Works Industrial Estate and Available Sites within/adjoining



- 9.102 Furthermore, the vacant land to the north of the existing industrial buildings at WY/13/02, and all of site WY/13/01, has extant planning permission (10/00855/REMAJ) for a residential development comprising of 81 dwellings with associated roads, parking and open space. As such both sites should be excluded from the employment land portfolio.

Table 9.10 Allocated Employment Sites Appraised at the Windsor Castle Works Industrial Estate

Site Reference and Name	Site Status and Planning Designation	Gross Site area, in hectares (Net area in brackets)	Total Ranking	Recommendations
WY/13/01: Allocated Site, Station Road, Poulton	Allocated	0.34 (0.34)	18	Deallocate
WY/13/02: Windfall Site, Station Road, Poulton	Vacant land within existing employment site	0.91 (0.91)	20	Do not allocate

Employment Area Summary

- 9.103 **Having regard to the age and condition of the buildings, the extent of vacant land and the extant planning permission for non-B-class uses on most of WY13/02 and all of WY/13/01, it is recommended that the estate is not protected for employment purposes, and that the existing allocation EMP2/6 (site WY/13/01) be deallocated for employment use.**

WY14: Bank View Industrial Estate, Hambleton

Overview

- 9.104 This small estate, 0.9 ha, fronts the A588 on the south-west edge of Hambleton, a village to the east of the River Wyre estuary. The estate adjoins agricultural land and accommodates a range of uses including employment, retail, a petrol filling station and car sales. The site currently does not benefit from any employment land allocations or protection in the Wyre Local Plan. There are bus stops on the A588 to the front of the estate. Access to the strategic highway network is poor.
- 9.105 Bank View Industrial Estate accommodates a range of businesses and services that support Hambleton and the surrounding rural area. It is prominently located and accessible to the nearby village, although due to the site's layout and orientation it is not considered that it presents significant residential amenity issues.

Figure 9.13 Boundary of Existing Bank View Industrial Estate



Employment Area Summary

- 9.106 **Bank View Industrial Estate is reasonably well occupied and serves a range of local businesses. It is recommended that the estate retains its employment land protection in planning policy terms to provide rural employment opportunities.**

WY15: Sunny Bank Industrial Estate, Hambleton

Overview

- 9.107 This small estate, 0.43 ha, is situated on the south-east edge of Hambleton, a village to the east of the River Wyre estuary. The units which are to the rear of two houses are arranged around a yard. To the north and east are residential properties, to the south and west is agricultural land. The units accommodate car maintenance, car sales and related businesses.
- 9.108 Access to the estate is from Grange Road along a narrow access road. The nearest bus stops are in the centre of the village. Access to the strategic highway network is poor.
- 9.109 Bank View Industrial Estate is reasonably well occupied and serves a range of local businesses. The estate infrastructure is poor but adequate for car servicing and maintenance. Its peripheral location in the village means that these uses can operate without overly disturbing residential amenity.

Figure 9.14 Boundary of Existing Sunny Bank Industrial Estate



Employment Area Summary

- 9.110 **It is recommended that the estate retains its employment land protection in planning policy terms to provide rural employment opportunities.**

WY16: Old Coal Yard, Preesall

Overview

- 9.111 This small estate, comprising just 0.47 ha, fronts the A588 Hall Gate Lane to the south of the Park Lane crossroads. It is located to the south of Preesall village amongst a cluster of buildings around the crossroads. The Old Coal Yard is situated behind a residential property, but otherwise adjoins agricultural land.
- 9.112 Accesses to the Old Coal Yard are from Hall Gate Lane to either side of the house. There are bus stops just to the south. To the north the road junction at the crossroads is poor. Access to the strategic highway network is poor.
- 9.113 The Old Coal Yard is occupied by two local businesses. The estate infrastructure is poor. Land to the west and south has been submitted as an employment area through the 'Call for Sites' process (site reference WY/00/01, Hallgate Lane) and is considered separately in Section 10.0. Whilst the Old Coal Yard remains occupied it provides local employment opportunities within this rural area.

Figure 9.15 Boundary of Existing Old Coal Yard



Employment Area Summary

- 9.114 **It is recommended that the estate retains its employment land protection in planning policy terms to provide rural employment opportunities.**

WY17: Preesall Mill Industrial Estate

Overview

- 9.115 This small estate, at 0.41 ha, fronts the B5377 Park Lane at Preesall. The Estate is situated behind a house, and has residential properties to three sides of the estate, and agricultural land to the rear.
- 9.116 Accesses to the Estate are from Park Lane to either side of the house. There are bus stops close to the entrance. Access to the strategic highway network is poor.
- 9.117 Preesall Mill is a Grade II listed windmill which is now surrounded by modern units. These units are occupied by local businesses. The estate infrastructure is functional.

Figure 9.16 Boundary of Existing Preesall Mill Industrial Estate



Employment Area Summary

- 9.118 **It is recommended that the estate retains its employment land protection in planning policy terms to provide rural employment opportunities.**

WY18: Park Lane Garage, Preesall

Overview

- 9.119 This small estate, at 0.54 ha, fronts the B5377 Park Lane at the junction with the A588 Hall Gate Lane. It is located to the south of Preesall village, although there is a cluster of buildings around the cross roads.
- 9.120 Access to the Estate is obtained directly from Park Lane, and bus stops are positioned close to the entrance. The road junction at the crossroads is inadequate, whilst the access to the strategic highway network is also considered to be poor.
- 9.121 The units on the site generally comprise modern prefabricated structures that have been erected over the past three decades. The units are occupied by local businesses related to car sales, repair and maintenance. The estate infrastructure is merely functional, with around half of the site set out as hardstanding for second-hand car sales.

Figure 9.17 Boundary of Existing Park Lane Garage



Employment Area Summary

- 9.1.22 **It is recommended that the garage retains its employment land protection in planning policy terms to provide rural employment opportunities.**

WY19: Nateby Technology Park

Overview

- 9.1.23 This Technology Park is an office development built within the last ten years in an attractive rural setting surrounded by open countryside. There is a bowling green to the front of the site. The land to the north remains undeveloped, but we understand this has planning consent for a further phase of office development. The whole site is 0.83 hectares in size. There are residential properties adjacent to the site.
- 9.1.24 The site is located within an area defined as Countryside (SP13) in the Wyre Local Plan. Policy CS7 of the emerging Wyre Core Strategy seeks to retain this site for employment purposes and provides support, in principle, for its intensification and/or limited extension.
- 9.1.25 Access to the Technology Park is from Cartmell Lane. The nearest bus stop is in Nateby village, 1km away. Access to the strategic highway network is also very poor.
- 9.1.26 Overall, it is considered that the Technology Park provides new, good quality office accommodation for small businesses seeking to locate to a rural setting.

Vacant land on part of the site could be redeveloped to accommodate a small new office block in future.

Figure 9.18 Boundary of Existing Nateby Technology Park and available employment sites within



Table 9.11 Available Employment Sites Appraised at the Nateby Technology Park

Site Reference and Name	Site Status and Planning Designation	Gross Site area, in hectares (Net area in brackets)	Total Ranking	Recommendations
WY/19/01: North of Entrance, Nateby Technology Park	Vacant Existing Site	0.17 (0.17)	22	Vacant land within existing employment site

Employment Area Summary

9.127 **It is recommended that the estate retains its employment land protection in planning policy terms to provide rural employment opportunities, with the vacant land at site WY/19/01 allocated for employment purposes. Any future expansion can be accommodated on available land within the Park, which could be allocated for that purpose if considered necessary.**

WY20: Taylors Lane Industrial Estate, Pilling

Overview

9.128 Taylors Lane Industrial Estate comprises a small rural industrial estate of 1.3 ha situated on the edge of Fishers Row, a small settlement to the east of the village of Pilling. The estate comprises three industrial buildings with 0.7 ha of undeveloped grassland to the rear.

9.129 Access to the estate is from Taylors Lane, which is on a bus route, with bus stops a short walk in either direction. Access to the strategic highway network is poor.

9.130 The estate provides modern industrial accommodation with concrete hard standing and circulation. It is suitable for a range of small businesses. The majority of units appeared to be unoccupied. A 0.69ha (gross) area of land to the south of the estate (site WY/20/01 in Table 9.12) is allocated for employment uses (EMP2/13) in the Wyre Local Plan. Policy CS8 of the emerging Wyre Core Strategy seeks to retain this site for employment purposes and provides support, in principle, for its intensification and/or limited extension. The site has not come forward despite its allocation; it is also located in Flood Zone 3, although it is understood that it benefits from existing flood defences. It is considered that significant infrastructure improvements would be required to service the site, and demand in this area appears weak. Hence the site's deallocation from the employment land portfolio should be considered.

Figure 9.19 Boundary of Existing Taylors Lane Industrial Estate and allocated employment site within



Table 9.12 Available Employment Sites Appraised at the Taylors Lane Industrial Estate

Site Reference and Name	Site Status and Planning Designation	Gross Site area, in hectares (Net area in brackets)	Total Ranking	Recommendations
WY/20/01: South of Taylors Lane Estate	Allocation	0.69 (0.62)	22	Deallocate

Employment Area Summary

- 9.131 **It is recommended that the estate retains its employment land protection in planning policy terms to provide rural employment opportunities. However, it is questionable whether the 0.69 ha of land to the rear (site WY/20/01) needs be allocated for employment use as there is a vacant plot on the front half of the estate and demand appears to be weak.**

WY21: Head Dyke Lane, Pilling

Overview

- 9.132 This site comprises a warehouse and adjoining factory buildings fronting the A588 at Stakepool, a small settlement to the east of the village of Pilling. The boundary of the estate is drawn tightly around the existing buildings. The estate is 0.39 ha in extent. There are residential properties adjacent to the site. There are no available employment allocations or vacant sites.

Figure 9.20 Boundary of Existing Head Dyke Lane Industrial Estate



- 9.133 Access to the estate is from Head Dyke Lane, which is on a bus route, and bus stops are a short walk to the east. There is hardstanding to the front of the buildings. Access to the strategic highway network is poor.
- 9.134 The buildings are pre-war, of poor specification, and are currently occupied. If they were to become vacant the prospects of finding a new occupier will be limited.

Employment Area Summary

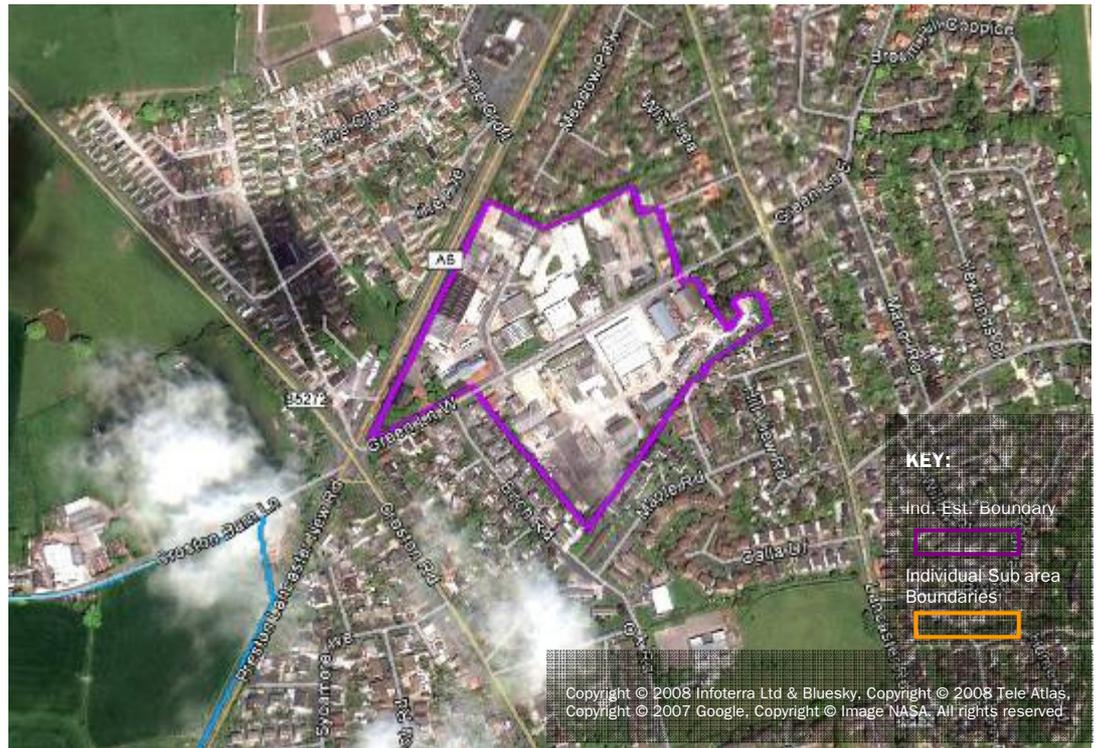
- 9.135 **It is recommended that the estate retains its employment land protection in planning policy terms to provide rural employment opportunities. However, should the buildings become vacant and extended marketing does not attract an occupier, consideration could be given to alternative uses.**

WY22: Green Lane West, Garstang

Overview

- 9.136 This established industrial estate of 5.8 ha is situated at the northern end of Garstang in the A6 Corridor. The estate is split by Green Lane West, to the north Leachfields Industrial Estate provides a range of small modern units; to the south are larger older units. The industrial estate is bounded to the west by the A6 but there are housing areas to the other three sides.
- 9.137 Green Lane West is accessed from the A6 via a signal controlled junction immediately to the west of the estate. There are bus stops on Lancaster Road a short distance to the east of the estate. Access to the strategic highway network is poor, but the A6 runs parallel to the M6 motorway and links to it at junctions 32 to the south and 33 to the north. The A6 is a single carriageway road that passes through several small settlements. As a consequence, Green Lane West Industrial Estate is relatively well connected to the motorway network compared with many other estates in the Borough.
- 9.138 The estate is intensively developed and provides a wide range of unit sizes, with some redevelopment having occurred over the past decade. Buildings and infrastructure at Leachfields Industrial Estate are of good specification, but to the south they are of poorer quality. There are no remaining development plots or allocations available.
- 9.139 There are vacant units within the estate, and it is estimated that overall the vacancy rate is around 15%. Occupiers range from indigenous companies to national businesses.
- 9.140 This remains Garstang's principal industrial estate. It is located in an area of relatively strong demand where there is a shortage of employment land. It is therefore important to protect this estate for employment use and to encourage the further recycling of existing sites.

Figure 9.21 Boundary of Existing Green Lane West, Garstang



Employment Area Summary

- 9.141 **It is recommended that the estate retains its employment land protection in planning policy terms. Improvements to units and infrastructure would support the continued operation of the area. Redevelopment of older units should be encouraged. There are no obvious opportunities to expand the estate due to the surrounding land uses.**

WY23: Riverside Industrial Park, Catterall

Overview

- 9.142 This industrial area of 2.3 ha is occupied in its entirety by Collinson plc and comprises a complex of manufacturing, office and storage buildings. It is situated to the west of Catterall immediately to the east of the A6. To the north is the River Wyre and to the south are open fields that are allocated for employment use. Policy CS9 of the emerging Wyre Core Strategy seeks to strengthen Catterall as an employment hub by making provision for up to 16 hectares of new employment land. A site immediately adjoining the Industrial Park to the north is allocated under Policy 2/17 for employment use in the Local Plan (site WY/00/05 in Table 9.14), whilst an existing employment allocation (EMP6) encompasses part of sites WY/00/06 and WY/00/06a.
- 9.143 The industrial area is accessed from the A6 via Tan Yard Lane, a no-through road that runs along the southern edge of the buildings. There are bus stops along the A6 at the entrance to the Industrial Park. Access to the strategic highway network is poor, although the A6 runs parallel with the M6 motorway

and links to it at junctions 32 to the south and 33 to the north. The A6 is a single carriageway road that passes through some small settlements. Thus Riverside Industrial Park is relatively well connected to the motorway network when compared with some other estates in the west of the Borough.

- 9.144 The estate is intensively developed and has been extended recently. Collinson own land to the south of the access from the A6, which allows improved sightlines at the junction. The company is now considering land to the south of Tan Yard Lane to be allocated for employment use to facilitate future expansion, rather than the existing allocations to the north and south of Catterall Gates Lane. Collinson is an important local company that has grown steadily in the past and is expected to grow further in the future. Its retention in the Borough can be facilitated by providing opportunities for the expansion of its existing site.
- 9.145 SES appraised the existing allocations as part of the initial appraisal process, whilst the potential for expanding the site southwards (site WY/00/06b) is considered separately in Section 10.0. All three sites scored relatively poorly, and particularly the northern site (WY/00/05). This site has no road frontage and is effectively landlocked. Although there is reasonably strong demand for new employment sites in this location, speculative development remains unviable. Furthermore, the site is located within Flood Zone 3 and is not considered to be a viable or sustainable site. WY/00/05 also adjoins new housing which could impact upon adjoining industrial operations.
- 9.146 In considering the options for the expansion of employment uses within this location, the separation of incompatible uses should be balanced against the potential of cross-subsidy to enable viable development. Our recommendations promote the allocation of land for the expansion of Collinson in the location that best complements the company's existing facility (i.e. site WY/00/06a to the south-west), whilst allowing higher values, specifically residential, to be generated elsewhere (i.e. site WY/00/06 to the south-east). Mixed use including employment could also be suitable on the western site should the proposed expansion of Collinsons not come forward.

Figure 9.22 Boundary of Existing Riverside Park Industrial Estate and allocated/potential employment site within



Table 9.13 Available Employment Sites Appraised at the Riverside Park Industrial Estate

Site Reference and Name	Site Status and Planning Designation	Gross Site area, in hectares (Net area in brackets)	Total Ranking	Recommendations
WY/00/05: Catterall Gates Lane North	Allocated for employment land	3.21 (2.73)	20	Deallocate
WY/00/06: Catterall Gates Lane South East	Part Allocated for employment land	3.27 (2.78)	20	Deallocate
WY/00/06a: Catterall Gates Lane South West	Part Allocated for employment land	3.6 (3.06)	22	Employment - Expansion Land

Employment Area Summary

9.147

It is recommended that the estate retains its employment land protection in planning policy terms. However, the allocation to the north (WY/00/05) is unsustainable due to very poor access and flood risk issues and should be deallocated for employment uses. Whilst the two remaining (partial) allocations to the south (WY/00/06 and 06a) are more likely to be developed over the course of the Plan Period, the necessary investment to bring forward the sites, and particularly road infrastructure, may mean that the sites may need to be reallocated for mixed use with an employment element, to allow an element of cross-subsidisation from higher value uses. WY/00/06a is more likely to come forward as expansion land for the existing

occupiers, Collinson, immediately to the north, whilst site WY/00/06 to the east would be more suitable for higher value, and specifically residential, uses. Section 10.0 considers the viability of developing land to the south of Tan Yard Lane (WY/00/06b) for employment purposes.

WY24: Brockholes Way, Catterall

Overview

- 9.148 This industrial estate of 10.5 ha is situated to the south of Catterall, with the southern tip of the estate fronting the A6. The north-west corner of the estate adjoins housing but otherwise the estate is surrounded fields. Garstang Road defines the western boundary of the site and Stubbins Lane the northern boundary.
- 9.149 The industrial estate is accessed from Garstang Road which joins the A6 in the south-western corner of the estate. There are bus stops on Garstang Road at the entrance to the estate and at the junction with Stubbins Lane. Access to the strategic highway network is poor, although the A6 runs parallel to the M6 motorway and links to it at junctions 32 to the south and 33 to the north. The A6 comprises a single carriageway road that passes through some small settlements; hence it is considered that Brockholes Way is relatively well connected to the motorway network when compared with most other estates in the west of the Borough.
- 9.150 The estate is intensively developed and has been extended recently through the expansion of the depot at Stubbins Lane. Infrastructure is of a good quality and the estate provides a range of unit sizes. Occupancy rates are high and occupiers are generally local businesses. Only one small plot remains undeveloped, the allocated (Policy EMP2/18) employment site WY/24/01 in Table 9.14, which scored reasonably well in the appraisal process as a result of the aforementioned factors and should retain its current allocation.

Figure 9.23 Boundary of Existing Brockholes Way Industrial Estate and allocated employment site within

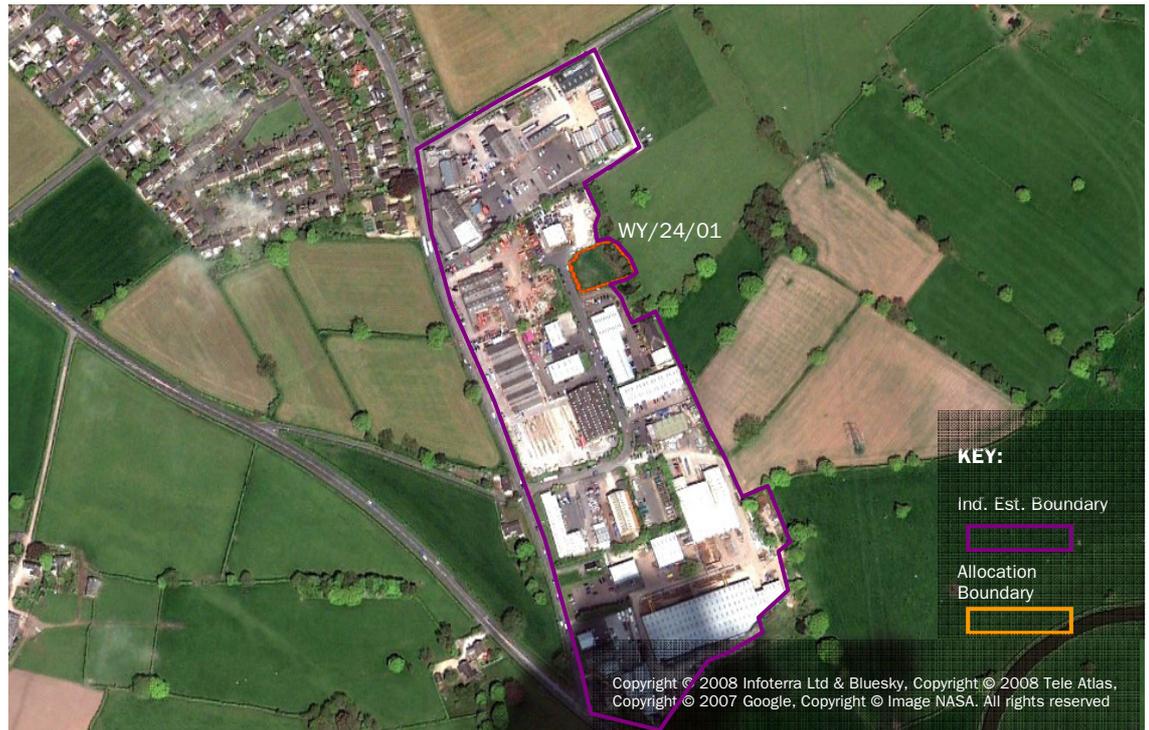


Table 9.14 Available Employment Sites Appraised at the Brockholes Way Industrial Estate

Site Reference and Name	Site Status and Planning Designation	Gross Site area, in hectares (Net area in brackets)	Total Ranking	Recommendations
WY/24/01: Brockholes Way	Allocation	0.20 (0.20)	29	Retain as an Employment Allocation

Employment Area Summary

9.151 **It is recommended that the estate retains its employment land protection in planning policy terms, with the last remaining developable area on the estate retained as an employment land allocation. The practicality of extending the estate to the south is considered elsewhere in this report (Section 10.0). Pressure for further incremental expansion to the west may also occur.**

WY25: Creamery Industrial Estate, Barnacre

Overview

9.152 This industrial estate situated to the south east of Garstang was recently extended and now covers 2.5 ha. The estate is bounded to the west by a railway and to the east by the M6. To the south are residential properties, a workshop and a public house.

9.153 The industrial estate is accessed via Kenlis Road from Ray Lane. The latter is unsuitable for HGVs as the bridge beneath the railway has height restrictions,

whilst the humpback bridge over the canal is of restricted width. There is no direct access to the M6 whilst the nearest A-road, the A6, is over a kilometre from the estate.

9.154 Buildings on the southern part of the estate appear to date from the 1970s and 1980s although the northern extension (formerly employment allocation EMP 2/16 in the Wyre Local Plan) accommodates modern factory units. Much of the central part of the estate is given over to hardstanding for the storage of caravans. The estate infrastructure is of moderate quality.

9.155 There appears to be a relatively high number of vacant units. There are no available development plots, although parts of the site remain underused and the capacity of the site could potentially be increased through selective redevelopment.

Figure 9.24 Boundary of Existing Creamery Industrial Estate, Barnacre



Employment Area Summary

9.156 **It is recommended that the estate retains its employment land protection in planning policy terms to provide rural employment opportunities. Improvements to units and infrastructure could support the continued operation of the area. Redevelopment of older units should be encouraged where appropriate.**

WY26: Calder Vale Mill

Overview

- 9.157 The Mill was built in 1835 and Lappett Manufacturing still operates it as a cotton mill on a 0.7 hectare site. It is situated in the village of Calder Vale which is set amongst open countryside to east of the M6. The Mill is set beside the River Calder in a steep-sided valley. There are single terraces of housing to the north and west.
- 9.158 The approach to the Mill is through the village along a narrow road that drops steeply into the river valley and is unsuitable for HGVs. Access to the strategic highway network is poor. The nearest A-road, the A6, is 6 kilometres away. There is a bus stop in the village, although services are limited.
- 9.159 The Mill is an attractive four-storey stone building which appears reasonably well maintained. To the rear are ancillary buildings including modern industrial unit. The site is constrained and staff parking is along the road to the north.
- 9.160 If the Mill were to be vacated there is little prospect of it being reoccupied by a single business. Few businesses require this scale of floorspace on multiple levels and with restricted head heights. In urban areas, the conversion of cotton mills to provide small workspace and office accommodation has been viable, but in such a remote rural location there is little prospect of achieving occupancy levels to sustain the long term viability of such an option.

Figure 9.25 Boundary of Existing Calder Vale Mill



Employment Area Summary

- 9.161 **Whilst Lappett Manufacturing remains in occupation, the Mill should retain its employment land protection in planning policy terms to provide rural employment opportunities. The company is a large local employer and its expansion needs should be facilitated where appropriate.**

WY27: Oakenclough Mill

Overview

- 9.162 This former paper mill, which began operations in the 1800s, has been subdivided to create a range of industrial units. Further units have subsequently been built to the east. The Mill is situated amongst open countryside to east of the M6. The Mill is beside the River Calder in a wooded valley. There are a few detached residential dwellings nearby.
- 9.163 The approach to the Mill is via country lanes that are unsuitable for HGVs. Access to the strategic highway network is poor. The nearest A-road, the A6, is 6 kilometres away. There is a bus stop beside the Mill, although services are limited.
- 9.164 The site is constrained, circulation is poor and infrastructure is of a relatively low quality. There are a number of vacant units, most of them small and of poor quality. There is no capacity for further development on the site. The larger buildings are occupied by rural businesses including animal feed suppliers and timber merchants.

Figure 9.26 Boundary of Existing Oakenclough Mill



- 9.165 Demand for employment premises in this thinly populated rural area is weak. The buildings are generally of a poor specification and, having regard to their age, the viability of their upkeep will become steadily weaker. If the larger occupiers were to vacate then the overall viability of the mill as a functional employment area would be undermined. However, at present, the existing businesses should be protected through the retention of the Mill as an employment area.

Employment Area Summary

- 9.166 **It is recommended that the Mill retains its employment land protection in planning policy terms to provide rural employment opportunities. Improvements to units and infrastructure would support the continued operation of the area. Some demolition could improve circulation within the site. If some of the larger units become vacant, they may be difficult to re-let and alternative uses of the site may need to be considered at that time.**

Other Sites Outside Existing Employment Areas – Longmoor Lane

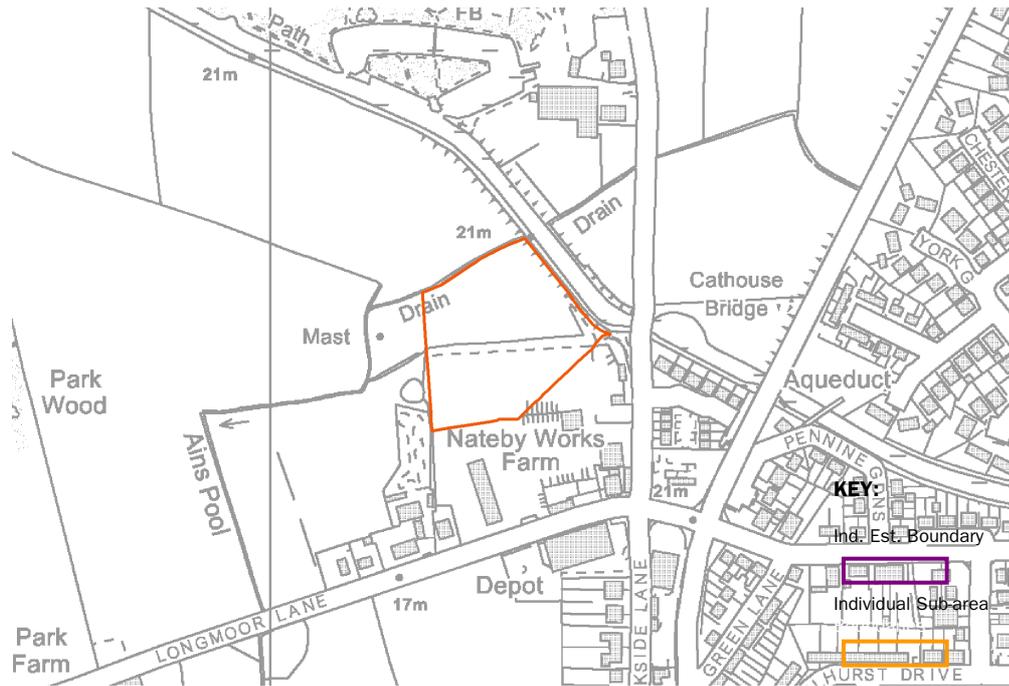
Overview

- 9.167 The only existing allocation not addressed within the above 27 existing employment areas relates to an employment allocation adjoining the Longmoor Lane storage depot. This depot to the front of the site is occupied by C&C Supplies (Collinson) Ltd, and it is understood that they own the allocated land to the north. It is located within the existing settlement boundary and is designated as an Existing Employment Commitment (EMP2/15) in the Wyre Local Plan.
- 9.168 The only access to the site is through the existing Collinson depot that fronts Longmoor Lane, 50m to the west of the junction with A6. The junction is poor, although the A6 is free-moving and avoids residential areas. The site's location within the A6 corridor has a reasonable level of demand. The site is landlocked, but has been bought by C&C Supplies to accommodate the expansion of its depot.
- 9.169 It is understood that the company does not intend to make the land available for general employment needs nor could the site easily be accessed, except through the company's existing depot. It is common practice to exclude expansion land from an analysis of availability and take-up, as it is not generally available for development, and it is effectively removed from the market on purchase.

Table 9.15 Available Employment Sites Appraised at Longmoor Lane, Nateby

Site Reference and Name	Site Status and Planning Designation	Gross Site area, in hectares (Net area in brackets)	Total Ranking	Recommendations
WY/00/04: Longmoor Lane, Nateby	Allocation	1.37 (1.37)	24	Employment – Expansion Land

Figure 9.27 Boundary of Longmoor Lane, Nateby



Employment Area Summary

9.170 **It is recommended that the existing employment land allocation at Nateby be reallocated as expansion land for the existing Collinson depot to the south.**

Conclusions

9.171 The location of employment sites in Wyre has largely been determined by historic factors. In the urbanised western part of the Borough, there remains some potential for reducing the scale of employment land provision. In contrast, in the A6 Corridor there remains some pressure for new employment areas to come forward.

9.172 In the rural areas demand is more sporadic and small scale. Even where capacity appears constrained, allocating sites is no guarantee that new development will occur, and a more appropriate policy response may be to allow extensions of existing employment areas as and when an identified need arises. A similarly flexible approach could be taken where old buildings in isolated rural locations fall vacant. If appropriate marketing fails to attract new occupiers, alternative uses of these employment areas should be considered.

10.0

Demand/Supply Balance

Context

10.1

Our detailed site surveys provide a snapshot of the current available employment land within the Borough. This section compares actual levels of available land with anticipated requirements to understand the extent to which new allocations may be required.

10.2

As noted in Section 8.0, it is considered that to meet Wyre's needs in isolation, around 45ha of employment land should be provided between 2011 and 2029.

10.3

In terms of how this relates to the current employment land portfolio, various factors make any such quantitative analysis an inexact science. On the supply side of the equation the total amount of land available at any given point in time is indeterminate. The exact amount depends upon:

- The size of private reserves (i.e. industrial land held with existing buildings for expansion). These are normally excluded from the analysis as they are not generally available for development;
- The number of windfall sites arising which are not presently allocated for employment uses, but which may become available for such uses;
- The number of further sites becoming available through the recycling of land currently in industrial use.

Take-up of Employment Land

10.4

The Council has supplied data on take-up of employment land over the nine year period, April 2003 to March 2012. We have checked this data by comparing Google Earth imagery at various dates with the most recent Ordnance Survey data. Sites taken-up are listed at Appendix 4. Take-up is not necessarily confined to available allocated sites. In older industrial areas windfall sites can provide redevelopment opportunities. We have identified two instances of premises having been redeveloped in Garstang, which are included within our figures. We have excluded take-up of employment land for non-employment uses.

10.5

Take-up of allocated land for employment purposes over the period 2003-12 has totalled 28.47 ha. This equates to an average of 3.16 ha per annum (excluding unallocated sites 2007-2012). The period over which take-up has been measured spans a period of strong economic growth, the recession and subsequent low growth. The take-up figures should therefore be reasonably representative of requirements for land over the long term. However the figures are distorted by an unusually large development – the take-up of 13.3 hectares for the Lancashire Waste Technology Park in 2010-11, which represents 47% of all land developed in Wyre over the last nine years.

- 10.6 At the Hillhouse Secure Site there has been substantial take-up, though the exact amount is difficult to establish, hence we have adopted WBC's figure of 8.59 ha. Development activity at Hillhouse is not representative of the rest of the Borough as some of the businesses related to the chemical sector that are located here have much larger site requirements than other indigenous businesses within Wyre.
- 10.7 Take-up elsewhere in the Borough has totalled 6.58 ha, which equates to 0.7ha per annum.
- 10.8 The overwhelming majority of employment land take-up has been for industrial / storage uses. There has been just one office developed - at Wyrefields, Poulton Industrial Estate - where Becketts Financial Services occupy a three storey office on a site of around 0.09 ha. This represents just 0.3% of take-up in the Borough.
- 10.9 Analysis of take-up by size of site identifies that the majority of take-up is of sites of less than 0.4 ha (one acre) and that 86% of take-up involves sites of less than a hectare.

Table 10.1 Take Up By Size Band, 2003-12

Size Band (ha)	0 0.2	0.2 0.4	0.4 1.0	1.0 5.0	5.0+	Total
	7	11	7	3	1	29
Percentage of Sites	24%	38%	24%	10%	3%	100%

Implied Supply of Employment Land by Sub-Area

- 10.10 To isolate the impacts of Hillhouse and the Waste Technology Park it is informative to compare availability and take-up within sub-areas rather than across the Borough as a whole, as presented in Table 10.2. This analysis identifies those areas of relative surplus and shortage and is intended as a guide to rebalancing the portfolio. It should not be used in an overly prescriptive way, as the market for employment land is not confined to specific locations. The 'available' land has been separated out on the basis of those remaining sites that have some undeveloped land allocated for employment use under Local Plan Policies EMP2 and EMP3 (totalling 22.6ha), and vacant sites within existing employment areas (60.8ha), which includes Hillhouse International and most of Fleetwood Port.

Table 10.2 Available Land versus Take Up by Sub-Area, 2003-12

Sub Area	Remaining Allocated Employment Land July 2012 (net)	Vacant Land within existing Employment Areas (net)	Take up of allocated land 2003 12 (9 yrs)	Average Annual Take up (ha)	Implied Supply (years)
	8.72	4.10	0.84	0.09	42
Thornton (excluding Hillhouse)	5.81	3.08	14.13	1.57	6
Hillhouse Secure Site ¹⁷	0	43.15	8.59		45
Poulton & Carleton	1.51	2.06	2.19		15
Rural West	0	0	0		-
Central Rural Plain					
Garstang & Catterall					
	0	0	0	0.00	-
Wyre	22.58	60.83	28.47	3.15	26

10.11 Overall, it is clear that the Borough potentially has an over-supply of employment land in very basic terms, with around 26 years' worth of forward supply should past delivery rates continue. The sub-area analysis in Section 9.0, however, has identified the following themes:

- At **Fleetwood** there is surplus land for employment use. Much of this land is at the Port and within the ownership of ABP. The land at the mouth of the Wyre estuary is regarded by ABP as a priority for port related uses. Some land adjoining the Fish Dock could accommodate businesses serving the marina, but other land is regarded by ABP as surplus to the Port's needs and could be allocated for general employment or alternative uses. The fish processing sector, an important part of Fleetwood's economy, is no longer reliant on local catches and thus need not be located within the Port itself. In considering whether re-allocation of land should take place at the Port or at Copse Road, regard should be had to the qualitative assessment of sites.
- Take-up in **Thornton** has been focussed at the **Hillhouse Secure Site**. With the exception of the Waste Technology Park there has been no development elsewhere in Thornton. Available land will increase next year with 9.98 hectares becoming available at Norcross in **Cleveleys**.

¹⁷ The number of sites and amount of land available at Hillhouse is difficult to determine. Wyre Council in its draft Employment Land Monitoring Report, April 2011 – March 2012 estimates that 51.12 hectares gross are available for employment purposes. We have identified 47.53ha.

There is little justification for retaining all this land for the Borough's employment needs. Within the Hillhouse Secure Site the scale of oversupply is uncertain; the 45 years supply identified in Table 9.2 is a conservative estimate.

- Supply at **Poulton-le-Fylde** is generally constrained. Take-up has been confined to the popular Poulton Industrial Estate, where only 1.37 ha remains available. Other locations in Poulton are less popular; demand for land at Robson Way, Carleton and Station Road remains weak.
- In the **A6 corridor (Catterall and Garstang)**, there remains substantial allocations/available sites, but much of this land is farmland with no infrastructure or servicing, or otherwise constrained (i.e. flooding or poor access links). Just 0.20 ha of the 8.19 ha allocated is immediately available. Take-up has been reasonable and, despite the economic downturn, demand for new sites in this area remains strong. As a consequence, many companies and developers have become frustrated by the tight supply of readily available sites. It will be important to identify which of these allocated or potential sites should be taken forward.
- Since 2003 no land has been taken-up in the **remaining rural areas**. There is no evidence that this is due to the lack of available sites; as elsewhere (e.g. at Kirkland & Stubbins Lane, Catterall) existing employment areas have expanded onto adjoining farmland. It should be considered whether allocating land for employment use in rural areas is appropriate when demand is sporadic and of a relatively small scale. A more effective policy response may be to allow extensions of existing employment areas as and when the need arises, subject to an assessment of impacts on surrounding areas.

10.12 In summary, neither the econometric modelling, nor the quantum of land available when compared to past take-up, would justify substantial levels of additional provision. Given the increasing risks associated with estimating appropriate provision over a very long period, any proposals to use an extended plan period as an appropriate justification for substantially higher allocations should be treated with caution. However, the study has given appropriate consideration to whether certain sites could be de-allocated, or removed from employment protection, as well as the need to provide new sites better suited to providing a portfolio of around 45 hectares that can support future economic growth in Wyre Borough.

The Portfolio of Sites

10.13 Economic modelling has identified the net-contraction of manufacturing (B1b/B1c/B2) and the growth of offices (B1a) and to a lesser extent, distribution (B8). In overall terms, there is a need to ensure that there are sufficient allocations for office and warehouse development, whilst recognising that there can be a reduction in the land available for general industry.

- 10.14 Take-up of employment land is typically recorded on a plot by plot basis, which equates to a net developable area. To be consistent, availability should be measured on the same basis; so for some sites, gross to net adjustments are appropriate. We have considered each site and estimated the proportion of land likely to be lost to servicing and landscaping, having regard to typical gross-net ratios achieved on industrial estates and business parks elsewhere. A guide to the adjustments appropriate in different circumstances is set out in Appendix 5.
- 10.15 Within the Borough, land is available for the development of employment premises in ten separate locations. Some of these are established industrial estates, others are allocations where there has been no development to date. Within these ten locations are 41 'available' sites ranging in size from 0.17 ha to 15.92 ha (gross). The larger sites are capable of subdivision to provide a range of smaller development plots.
- 10.16 As indicated in Appendix 6 and summarised in Table 10.2, the Borough currently has 33.5ha of allocated employment land remaining, plus a further 56.7ha of unallocated vacant land located within existing employment areas. From the assessment of the employment areas in Section 9.0, a number of allocated employment / mixed use sites have been identified, where it is considered that they are no longer suitable for employment purposes and could be allocated for alternative uses. This would amend the portfolio as set out in Table 10.3.

Table 10.3 Recommended adjustments to the Existing Portfolio of Employment Land (net)

Sub Area	Current Portfolio of available sites		Deductions from the portfolio			Adjusted Employment Land Portfolio (net)
	Remaining Allocated Employment Land July 2012 (net)	Vacant Land within existing Employment Areas (net)	De allocations	Restricted uses*	Mixed use with no employment	
Fleetwood (excluding Port)	9.97ha	2.85ha	WY/10/02, 04, 05: 0.00ha (2.73ha gross)	WY/10/03: 1.25ha	use)	8.89ha
				WY/10/01:	-	0.00ha
Cleveleys	0.00ha	0.00ha	-	-	-	
Thornton (excluding Hillhouse)	11.27ha	2.46ha	WY/07/02: 0.62ha	-	-	8.27ha

Sub Area	Current Portfolio of available sites		Deductions from the portfolio			Adjusted Employment Land Portfolio (net)
	Remaining Allocated Employment Land July 2012 (net)	Vacant Land within existing Employment Areas (net)	De allocations	Restricted uses *	Mixed use with no employment	
			WY/07/03: 1.98ha WY/07/04: 2.47ha WY/07/05: 0.39ha			
Hillhouse Secure Site	0.00ha	43.15ha	WY/04/08: 13.53ha	WY/04/01: 12.31ha WY/04/02: 1.19ha	-	16.12ha
Poulton & Carleton	1.51ha	2.06ha	WY/11/01: 0.20ha WY/13/01: 0.34ha WY/13/02: 0.91ha	-	-	2.12ha
Rural West	0.00ha	0.00ha	-	-	-	0.00ha
Central Rural Plain	0.62ha	0.17ha	WY/20/01: 0.62ha	-	-	0.17ha
Garstang & Catterall	10.14ha	-	WY/00/05: 2.73ha WY/00/06: 2.78ha	WY/00/04: 1.37ha WY/00/06a : 3.06ha	-	0.20ha
Rural East & Uplands	0.00ha	0.00ha	-	-	-	0.00ha
Wyre	33.51ha	56.70	26.57ha	25.18ha	2.69ha (plus 5.37ha for B-use)	35.77ha

*Note: 'restricted uses' includes allocated / vacant employment land sites that could be removed from the general employment land portfolio and protected for restricted/specialist uses, specifically port-related, chemical and energy related or as expansion land for adjoining businesses.

10.17 It is recommended that some 26.6ha of the existing allocations/available employment land be de-allocated; and 25.2ha be re-allocated for restricted

uses, such as port related. A further 8.06ha would be reallocated from B-class employment use only, to incorporate a mix of uses (potentially including a 5.37ha employment land component). This leaves Wyre with a dedicated employment land portfolio totalling around **35.77 ha**).

10.18 **A further 9.98ha net (10.50ha gross) is also likely to become available next year following the relocation of the DWP from Norcross, of which it is recommended that 9.12ha should come forward for mixed use with half of that land (4.56ha) to be retained for employment use.**

10.19 Seven potential employment sites totalling an estimated 33.12ha net (41.74ha gross) have been identified and could, in whole or in part, be allocated to provide additional employment land. These sites are discussed in further detail below.

Potential Employment Sites

10.20 This quantitative analysis demonstrates that Wyre as a whole has a surplus of employment land, but that within the Borough there are areas of both surplus and shortage. In planning for an 18 year plan period to 2029, the analysis suggests that there is scope for reducing the supply of employment land in Fleetwood and Thornton, identifying additional land at Poulton and bringing forward either an existing allocation or unallocated land in the A6 Corridor.

10.21 To address this need we have assessed additional sites that have not yet been allocated for employment use, but which have been put forward either through the Council's Call for Sites process, or through Officer's knowledge of the area. In total, seven potential sites have been appraised (see Appendix 2):

- 1 Hallgate Lane, Preesall (3.46ha net, WY/00/01);
- 2 Carr Lane, Pilling (1.81ha net, WY/00/02);
- 3 Land West of A6, Garstang (13.6ha net, WY/00/03);
- 4 Catterall Gates Lane South (3.68ha net, WY/00/06b);
- 5 Beech House Fields, Garstang Road, Catterall (1.73ha net, WY/00/07);
- 6 Brockholes Way Extension, Catterall (7.00ha net, WY/00/08); and,
- 7 Garstang Road, Bilsborrow (1.84ha net, WY/00/09).

10.22 The first two of these sites are in rural areas. The **Hallgate Lane, Preesall** site adjoins a small established employment area and is currently used as grazing land. At **Carr Lane, Pilling**, dilapidated greenhouses are situated on the northern half of the site, whilst the remainder comprises grazing land. The qualitative assessment rates both sites poorly. Infrequent demand for development sites in the rural areas of the Borough cannot justify allocations of this scale, and it is recommended that WBC institute a policy that allows it to respond to demand as and when it arises, rather than allocate employment sites that could remain undeveloped through the plan period. Such a policy could prioritise the reuse of previously developed land, or former agricultural

premises such as the greenhouses at Pilling. **It is not considered that either site be allocated for employment use as a consequence.**

- 10.23 The remaining five potential sites could potentially provide 27.85ha net.¹⁸ Only a small proportion of these potential employment sites should be allocated for employment purposes. Against the key indicators of strategic access and barriers to development there is little to distinguish between these sites.
- 10.24 An important consideration in the allocation of sites is the assessment of viability. Cross subsidy from more valuable uses (in particular residential) could be achieved on four of these five sites in the A6 corridor. The Brockholes Extension site, which is separated from existing housing areas and encroaches significantly into the open countryside, would be poorly suited to mixed-use. Consideration should also be given to the most suitable locations for new housing, although this aspect of site selection is beyond the scope of an ELR.
- 10.25 We are aware of at least two businesses in the A6 corridor with requirements for expansion land. Collinson is understood to be interested in Catterall Gates Lane South West (WY/00/06a), whilst Leach Structural Steelwork is interested in a substantial part of **Brockholes Way Extension** (WY/00/08). At Catterall Gates, the existing employment allocations are set back from the A6, whereas the potential extension site (**Catterall Gates Lane South Extension WY/00/06b**) has a frontage onto the main road and could thus be accessed without passing through residential areas of Catterall or via the narrow Tan Yard Lane. This larger scheme would also have the potential to allow greater cross-subsidy from higher value uses. The viability of industrial development on these two sites is considered elsewhere in this section.
- 10.26 The land to the **west of the A6 at Garstang** (WY/00/03) has been put forward as a major extension to the town during consultation upon the Core Strategy Preferred Options. The scale of housing development that could be accommodated could potentially allow the cross subsidisation of an employment area as part of the wider scheme. Unlike some other potential employment sites in the A6 corridor, an existing traffic light junction on the A6 may allow early phases of development to be accessed from Croston Barn Road without the need for junction improvements on the A6. This could keep the costs of up-front infrastructure relatively low and thus improve the viability of the development as a whole. The proximity of the site to town centre services is another distinguishing feature of this site, as there is an opportunity to provide a walking and cycling route to the town centre along a disused railway line which passes through the centre of the site and beneath the A6.
- 10.27 **Beech House Fields** (WY/00/07) comprises grazing land put forward as a mixed use development in the call for sites process, with employment on the

¹⁸ Where site plans identify a proposed split between employment and housing uses e.g. Beech House Fields, Catterall, the net area is based only on the employment part. Where there is no such distinction the whole area is included.

southern part of the site immediately to the west of Brockholes Way Industrial Estate. The site is located outside the settlement boundary and is within the Countryside (SP13) in the Wyre Local Plan. The site would require significant infrastructure investment to bring it forward, the cost of which would be disproportionate to its small size.

10.28 **Garstang Road, Bilsborrow** (WY/00/09) is a greenfield site fronting the A6 and facing housing on the opposite side of the road. Again, given the small size of the site the cost of providing access and infrastructure to the site, could be disproportionately high. Development of premises for B2 or B8 use may also have an adverse impact on nearby residential properties.

10.29 Both WY/00/07 and WY/00/09 score relatively poorly, and there is relatively little to choose between them in terms of development constraints, sustainability considerations or market attractiveness. Our qualitative assessment rates the land to the **west of the A6 at Garstang** as being marginally better for employment development than these other two potential sites.

Potential Site Summary

10.30 **The sites identified at Catterall Gates Lane South, Brockholes Extension and West of A6 at Garstang could each comfortably accommodate employment land requirements for the A6 corridor for the period to 2029.**

10.31 In determining an appropriate amount of employment land, WBC should have regard to the need to accommodate housing and other land uses on part of one or all of these sites and the extent to which this could provide some cross-subsidisation of lower value uses. It is recommended that more detailed masterplanning work is commissioned to inform the appropriate allocation of different uses on the preferred sites.

Viability Assessment of the Catterall Sites

10.32 WBC required SES to undertake an assessment of the viability of B-class employment development at two of the aforementioned potential employment sites assessed, specifically Catterall Gates Lane South (WY/00/06b) and Brockholes Extension (WY/00/08), both in Catterall.

Context and approach

10.33 Speculative development in Wyre is currently undermined by relatively low rents, modest demand leading to longer sale letting periods and local businesses which can offer only low covenant strength to landlords. These features impact on the financial viability of speculative industrial and office development. There may be opportunities for a developer/investor such as Northern Trust, who is driven by longer-term returns, although its development programmes focus on larger towns and its construction activity is cyclical.

- 10.34 Historically, demand for development plots has predominantly been from businesses looking to build units for their own occupation. Neither industrialists nor developers want the risk and uncertainty of buying sites with abnormal costs of remediation or infrastructure provision. Market demand is therefore for serviced development plots. In assessing the viability of development at the two Catterall sites we have adopted a two stage process:
- Firstly we have prepared an appraisal of industrial development on a serviced site to understand the level of gap funding that might be required to stimulate speculative development of development plots.
 - Secondly we have considered the extent of works necessary to provide serviced development plots at each of these locations by assessing abnormal costs of development and consulting with utility companies to identify any major constraints and costs of extending existing mains provision.

Viability Assessment

- 10.35 Our analysis of take-up identifies that 86% of take-up has been on sites of less than a hectare and that 62% have been on sites of less than 0.4 ha (one acre). Road layouts and utilities provision will therefore need to reflect these requirements. Our analysis of take-up also identifies that in the Garstang / Catterall area, take-up has averaged around one site per annum, although we understand that low levels of available land may have constrained development activity in the recent past.
- 10.36 In addition to general demand for sites in the A6 corridor, some of the area's largest employers are seeking to secure future expansion land. Collinson occupy a 2.3 ha site at Tan Yard Lane, Catterall and have put forward a further 2.7 ha site on the opposite side of the road, which we refer to as Catterall Gates Lane South West, for allocation as employment land in the emerging Local Plan. The site of a dwelling at the junction of Tan Yard Lane with the A6 is outside this area but is owned by Collinson and could form part of a future development site. Collinson intends to build this out over a long period and parts could be let on short leases until required.
- 10.37 Leach Structural Steelwork Ltd are situated at the southern end of Brockholes Way and have approached the owner of adjoining farmland, Mr Eccles, to purchase around 12 acres (4.9 ha) for expansion (site WY/00/08). Mr Eccles is understood to be willing to sell and sees this requirement as an opportunity to open up additional land for industrial development to meet general employment needs in the A6 corridor.
- 10.38 On the basis of past take up (making an allowance for likely past under-delivery due to a shortage of good quality sites), it is estimated that around 5.5 hectares gross (4.65 ha net) of employment land could be required in the A6 corridor over the period to 2029 to meet general employment needs, with a further 2.7 ha and 4.9 ha gross to meet Collinson's and Leach's respective expansion requirements. To avoid the additional operational costs of operating

split sites, both Collinson and Leach are likely to prefer to expand on land immediately adjoining their existing sites. On the premise that the two expansion requirements are accommodated on adjoining land at Catterall Gates Lane South and Brockholes Extension, the central question becomes where 5.5 ha of land should be allocated for general employment needs. After making provision for expansion land, both sites have capacity to accommodate this general employment land requirement.

- 10.39 In current economic circumstances, finance (and particularly development finance), continues to be very difficult to source. At the present time it is our experience that banks will only provide funding for development schemes that show a profit on cost of 20% or more. It is difficult to say when 'fundable' profit levels will return to 15% or less.
- 10.40 Falling rents, longer letting periods and greater tenant incentives also undermine the viability of speculative office and industrial development schemes. How long these conditions will persist is uncertain. We have therefore tested the viability of industrial development in market conditions more conducive to property development on the assumption that the market will return to 'normal' conditions during the plan period.
- 10.41 Our rents, yields, finance rates, letting periods and rent free periods reflect those prevailing in the relatively stable market conditions that preceded the unsustainable peak of the market and the subsequent recession. We assume that a landowner would not sell land allocated for employment for less than the agricultural value of the site and that a developer would offer substantially less than industrial land values for a site without detailed planning consent which requires substantial infrastructure provision. We have assumed a purchase price of £150,000.
- 10.42 The ODPM ELR Guidance Note identifies plot ratios for industrial development of 35% to 45%. Using a 40% plot ratio we estimate that a notional 5.5 ha site has capacity for buildings with a gross floor area of around 19,000 sq m (200,000 sq ft). To meet a greater range of occupier requirements we assume that a developer would construct a variety of unit sizes that could be subdivided or combined. Assuming a basic layout, an estate could be arranged as a central spine road of around 250m in length with two spurs roads off, each about 100 m long. The site would be built out in phases over the period of the Local Plan, but we have assumed the up-front provision of estate infrastructure.
- 10.43 Department for Transport data on existing traffic flows on the A6, traffic growth assumptions and estimates of trip generation suggest that a signalised junction would be required to access an industrial estate of this size. This and the cost of providing estate roads are included in our budget estimate of site works of £800,000, which makes no allowance for adverse ground conditions.
- 10.44 Our appraisal of an indicative industrial scheme is provided at Appendix 7. Construction costs have been based upon Building Cost Information Service Average Price data. Rents have had regard to current rents for units at

Catterall and Garstang. No allowance has been made for empty rates liabilities.

- 10.45 The appraisal demonstrates that a speculative industrial scheme could not be developed profitably. We estimate that such a scheme would make a loss of around £1.8 million and that gap funding of around £4.5 million would be required to produce a 20% profit on cost and to allow the scheme to proceed. Such preliminary viability appraisals, which are based on broad assumptions and do not have the benefit of detailed plans or costings, can be sensitive to changes in inputs. Their purpose is to identify the likely scale of profit or loss and whether it is worthwhile proceeding with more detailed studies. Viability appraisals should be refined as part of the design process, and used to inform the final scheme.
- 10.46 To bring forward an industrial scheme in the A6 corridor, subsidy is required not only to cover up-front infrastructure costs, but also to cover the gap between construction costs and end values.
- 10.47 Where industrial development alone is proposed, then public sector funding will be required, but mixed-use schemes that include more valuable uses such as housing may be viable without public sector support. It is not unusual for employment sites in such locations to accommodate a range of uses (e.g. trade counters, petrol filling stations, offices, pub / restaurants etc), which, through higher values, improve the overall viability of a scheme.
- 10.48 Up-front costs can be reduced by utilising or upgrading existing infrastructure where available. Development costs and risks can be further reduced by building bespoke rather than speculative units. Accommodating a major requirement at an early stage in the development programme can also help to offset initial infrastructure provision and through reducing finance costs improve the overall viability of a scheme. All such opportunities to improve viability should be borne in mind during site selection.
- 10.49 In assessing the works required to provide serviced industrial plots we wrote to utilities companies to identify the proximity of mains connections and the impact of development of any mains passing across the sites. We had a very limited response. We have therefore relied upon information provided by the Council, landowners and from our own site inspections.
- 10.50 **Catterall Gates Lane South** (WY/00/06b) fronts the A6 and has alternative access from Daniel Fold Lane. Both roads have street lighting, which indicates mains electricity, and surface water drainage. The dwellings to the south west and south east boundaries of the sites suggest that mains gas, electricity, telecoms and drainage are available to these edges of the site although their capacity for additional connections is unknown. Overhead telephone cables serve the housing fronting the A6.
- 10.51 Whilst the existing access via Tan Yard Lane may be sufficient to serve an expansion by Collinsons onto WY/00/06a, we consider that junction

improvements or a new access to the A6 are likely to be required to serve a larger development.

- 10.52 **Brockholes Extension** (WY/00/08) also fronts the A6 where there is street lighting and surface water drainage. United Utilities have identified that a 300mm diameter foul sewer in Garstang Road could serve development in this location, that a water supply can be made available and that a large diameter water main crosses through the site. United Utilities state that an access strip with a minimum of 10 metres to either side of this main would need to be retained. A gas main passes beneath the site and high voltage electricity cables cross over the site, one pylon being situated on the southern end of the site. British Waterways (responsibilities now taken on by the Canal and River Trust) has suggested that development is set back from the canal and screened by planting. These factors will reduce the available net developable area.
- 10.53 Lancashire County Council [LCC] as Highways Authority has no objection in principle to accessing Brockholes Extension from the A6 but would require, as a minimum, widening of the A6 to accommodate acceleration and deceleration lanes and separate right hand turn lane. LCC suggests that a secondary access is provided from Brockholes Way and/or (in the case of the wider Brockholes Industrial Estate) Stubbins Lane.
- 10.54 If the Brockholes Extension were only to accommodate the expansion requirements of Leach Structural Steel, then the requirements for services to the site could be substantially reduced and utility supplies may just require extending. This would substantially reduce abnormal costs of development and, without any proposed speculative provision, the viability of the development will be largely dependent on the strength of Leach as a business.
- 10.55 In comparing Catterall Gates Lane South (WY/00/06b) with Brockholes Extension (WY/00/08), the following factors should be considered:
- Catterall Gates is considered to be a more appropriate location for a mixed-use scheme, which could allow a greater opportunity for cross-subsidy. However, the juxtaposition of housing and industry could give rise to amenity issues and restrictions on industrial activities. The need for new residential development, and consideration of its most appropriate location, is outside the scope of this study;
 - Both sites could potentially provide expansion opportunities that can be brought forward with substantially lower levels of abnormal cost. By contrast, provision of general employment land in either location is expected to involve much greater abnormal costs of development and would not be viable without some form of subsidy;
 - Overhead electricity cables, pylons and underground water & gas mains at the potential Brockholes Extension would sterilise strips of land and effectively reduce the net:gross ratio of the site. Proportionately more infrastructure will therefore be required to service an equivalent net

developable area. It may be possible to reduce the impact of these wayleaves by careful design.

10.56 These points highlight the balances to be struck between development viability, land use planning and highways issues. As industrial development in isolation will not be viable at either Catterall Gates or the proposed Brockholes Extension, economic growth can best be supported by the provision of serviced plots where businesses can develop bespoke premises. This will require funding and thus the potential sources of investment are also a key consideration.

10.57 Clearly, the funding environment has changed dramatically over the last five years. A major change has been the move away from the funding of property development per se to supporting the growth plans of specific businesses. We are not aware of specific growth plans for either Collinson or Leach, their eligibility for funding, nor the scope to which infrastructure improvements could be included in funding bids.

Catterall Viability Assessment Summary

10.58 Having regard to the expansion requirements of both Leach and Collinson, it is considered that land could be allocated for employment use at either location. The relative viability of providing additional land for general industrial purposes at each location depends upon a complex set of assumptions, some of which are beyond the scope of an ELR. Any viability appraisal is sensitive to changes in key assumptions, but the scope of uncertainty in this case make the use of appraisals of limited assistance in choosing between these two potential sites.

10.59 That said, it is considered that restricting both sites in their entirety for B-class employment use is likely to render both sites unviable; hence a mix of uses would be required, including higher value uses such as residential on part of the sites, to allow for cross-subsidisation of the lower value employment uses.

10.60 **Due to its proximity to existing residential areas, it is considered that the Catterall Gates Lane South site would make a more sustainable mixed use extension than the Brockholes Way site, although a flexible approach could be taken regarding any future applications by Leach regarding land immediately adjoining the existing industrial estate (the north-western part of site WY/00/08) to support the expansion of a successful existing business.**

Sub-Regional Employment Land Considerations

10.61 Blackpool Council has identified a potential shortfall of employment land provision in the order of 15 hectares. There is an opportunity to accommodate some of this surplus demand within Wyre, but it is those sites in closest proximity to Blackpool that are likely to be most suitable, and hence certain accessible sites in Fylde Borough, notably Whitehills Park, may have a key role. Clearly, the market for employment land does not have regard to local authority boundaries and past take-up (particularly in locations such as the Poulton Industrial Estate) will have reflected this wider sub-regional demand.

- 10.62 It is considered that those employment sites in the south-west of Wyre Borough are best placed to meet Blackpool's surplus demand. These include:
- **Robson Way, Carleton** – this is the north-eastern end of a large, long-established employment area that straddles the boundary of Blackpool and Wyre and backs onto the railway line. Estate infrastructure is poor particularly the road network within the estate. There has been some redevelopment of buildings, particularly at the south-western end of the estate. However, the north-eastern (Wyre) end of the estate is underused, of poor quality and requires substantial investment.
 - **Poulton Industrial Estate** – this popular industrial estate has seen recent development of infill plots and has been expanded eastwards. There is little available land on the estate but options for further expansion are restricted by a railway line to the west, the A585 trunk road to the north and a watercourse to the south-east which denotes the boundary with Fylde.
 - **Norcross, Cleveleys** – the relocation of DWP in 2012/2013 offers the potential for the redevelopment of up to 10 ha. The viability of this redevelopment is considered in more detail in Section 9.0.

10.63 As noted in Section 5.0, further discussions will be undertaken with Fylde and Blackpool Councils to agree how any unmet demand in Blackpool will be met across the Fylde coast sub-region and to feed into the preparation of a sub-regional employment land position statement.

Proposed Portfolio of Sites

10.64 The Matrix at Appendix 6 identifies our site-specific recommendations for the existing, allocated/available and potential employment sites in the Borough of Wyre. These are summarised in Table 10.4.

10.65 Clearly, any site-specific recommendations contained within this document cannot be viewed in isolation. Recommendations will need to be taken forward and tested through the proper preparation of policy by WBC and subject to suitable consultation as part of its Local Plan preparation process.

Table 10.4 Resultant Portfolio of Employment Land (net) in Wyre Borough to 2029

Proposal	Number of Sites	Gross Site Area (ha)	Net Developable Area (ha)	Net Employment Area (ha)
Retain Current Employment Allocation	9	9.00	8.14	8.14
Allocate vacant land within existing employment area for B-Class use	13	25.00	22.26	22.26
Employment land component of re-allocated Mixed Use sites	2	9.43	8.06	5.37
Employment land component of Mixed-Use redevelopment at Norcross	5	9.60	9.12	4.56
Employment Land Portfolio	29	53.03	47.58	40.33
Employment land component of Mixed-Use redevelopment at Catterall Gates Lane South Extension	1	4.33	3.68	1.84
Employment land component of Mixed-Use redevelopment at West of A6, Garstang	1	16.00	13.60	6.80
Potential Employment Land Portfolio	2	20.33	17.28	8.64
Reserve for Port Related Use	1	7.06	6.00	6.00
Reserve for Energy Generation	2	13.50	13.50	13.50
Reserve for Expansion Land	4	17.37	12.68	12.68
Other Employment Land Portfolio	7	37.93	32.18	32.18
Allocate as Mixed-Use without Employment Component	4	3.63	0.86	0.86
Deallocate	9	28.96	25.46	25.46
Potential sites not to be taken forward	6	11.51	9.95	9.95
Sites to be Excluded From Portfolio	19	44.10	36.27	36.27
TOTAL	57	155.39	133.31	117.42

10.66 Section 8.0 identified that around 45 ha of employment land was required over the 18 year plan period 2011 to 2029. The analysis above recommends that the current portfolio of land be rebalanced to ensure that **around 40.3ha net of land is allocated in the Local Plan specifically for B-class employment use, including the redevelopment at Norcross**. This would leave a shortfall of around 5ha.

10.67 To address this shortfall, a number of sites are identified for mixed use with an employment component, of which the Catterall Gates Lane South Extension and the site West of the A6 at Garstang are considered to be the most suitable.

Should these sites come forward as proposed, this would address any quantitative shortfall and provide **around 48.9ha of land for B-class employment use.**

10.68 In purely quantitative terms, the adjusted portfolio recommended above would therefore be sufficient to meet Wyre's requirements over the plan period. However, as the sub-area analysis has revealed, existing supply is currently poorly matched to demand. These initial proposals have attempted to rebalance the portfolio so that further opportunities exist in the western half of the Borough.

10.69 Rather than substantial new rural allocations scattered across the eastern half of the Borough, it is considered that any further requirements can be met instead in more isolated areas through conversions of redundant rural buildings or small-scale developments that should be assessed on a case-by-case basis. Accordingly, a criteria-based policy approach which encourages some conversion of appropriate redundant rural buildings and other small scale development to encourage home working and micro-industries appears appropriate.

Policy Advice and Delivery Mechanisms

10.70 This section considers policy measures which may be required to support Wyre's economic growth objectives. These relate to qualitative employment land issues such as how to renew and upgrade existing sites and how to encourage modern employment development within the constraints of a limited supply of potential new sites.

Policy Choices

10.71 Within Wyre, thin demand and relatively low levels of rent undermine the viability of the speculative development of employment premises even in times of strong economic growth. Developers and those businesses seeking to develop bespoke employment premises will avoid sites with high levels of abnormal cost. A majority (62%) of sites that have been taken-up over the last nine years have been less than 0.4 hectares (1 acre). Requirements of this scale will generally prefer serviced development plots on established industrial estates where abnormal costs of remediation or infrastructure provision are low or non-existent, allowing risks and uncertainties to be kept to a minimum.

10.72 On brownfield sites a range of interventions may be required before plots are readily available for development, including demolition, grubbing up foundations, levelling, remediation of contamination, renewal of infrastructure and utility supplies etc. The 'barriers to development' criterion of the qualitative assessment distinguishes between sites with no, modest or major infrastructure and/or remediation requirements. Only four sites have no barriers to development. These are:

- A small site on Red Marsh Industrial Estate that is likely to be reused for external storage.

- The Ro-Ro terminal at Fleetwood, which ABP expect to be re-used for this purpose in the future.
- A site at the southern entrance to Fleetwood Docks which is served by new road infrastructure. This site is allocated for mixed-use and is unlikely to come forward for lower value employment uses.
- A small site on Poulton Industrial Estate which adjoins a health & fitness club.

10.73 A further fifteen sites have minor infrastructure and/or remediation requirements. Twenty currently available sites require major infrastructure and/or remediation, as will the six Norcross sites when they become available in 2013 as little if any demand for the existing buildings can be anticipated. Those sites identified as potential allocations are currently farmland which will require major infrastructure provision.

10.74 With limited funding available for site servicing and remediation, regard should be had to the use of cross-subsidisation to bring forward employment sites. In allocating employment sites opportunities for developing higher value alternative uses, such as housing, elsewhere on a site should be a consideration.

10.75 The market alone is unlikely to deliver these improvements. Encouragement for owners/developers may be necessary, and could be aided by a range of planning and economic development interventions including:

- a A Local Plan policy encouraging such forms of upgrading, although this will only work in combination with other actions;
- b Continued and stronger Local Plan policy protection for certain industrial sites (reducing the potential for residential 'hope value' pricing out development – see Section 9.0 regarding existing employment sites);
- c WBC involvement in instigating more BID schemes in other suitable areas;¹⁹
- d Local initiatives to publicise to local firms case studies of successful upgrading of business premises, including costs, local contractors involved and rental or other benefits achieved;
- e The continuation of funds such as the Private Sector Projects fund, which supports such activities by developers or occupiers in the Borough;
- f Encouragement of mixed use developments to help facilitate and cross-subsidise the creation of B class premises where appropriate in planning policy terms; and

¹⁹ It is recognised that points c and d are both resource-hungry activities and that WBC may not have the resources to undertake them effectively. BIDs in particular would require support from legal and electoral services.

g WBC economic development officers engaging with owners on upgrading of premises.

- 10.76 There may also be the potential to explore different funding sources (e.g. Tax Increment Financing) and potential sources of grant aid to enable small/medium firms to upgrade premises or develop new premises if the market does not deliver these improvements. This could include a number of forms of direct Council financial support such as a Business Improvement Grant, direct lending to small firms and/or mortgage support, as well as grants to install renewable energy equipment. It is recognised that such measures will be harder to fund in the current economic climate and rolling back of public expenditure but appear worthwhile as future actions.
- 10.77 There are a number of other policy delivery mechanisms which have the potential to contribute to the delivery of more and better quality employment land which could be investigated further by WBC.
- 10.78 Firstly, **Section 106 agreements and/or Community Infrastructure Levy (CIL)** from larger developments could potentially be used, either directly or indirectly, to deliver workspace. This would be subject to the regulations governing these mechanisms. This particularly applies to schemes which involve a mixed-use redevelopment of existing employment land. Provision could be either on-site or in some cases, at an alternative location. It should be noted that the ability for projects to generate sufficient profit to enable such levies may be limited in all but the most buoyant markets. Any scheme involving the use of CIL to cross fund employment development from residential or retail uses will need to be underpinned by strong evidence justifying the need and viability of such an approach.
- 10.79 Whilst this approach offers the prospect of new B1a office space in Wyre, there are some potential problems in ensuring such provision is attractive to the market. The layout of the site and uses, particularly for mixed-use schemes, can make a significant difference to their commercial appeal, with most office occupiers wanting a relatively high profile location towards the front of a site and without any potential for amenity conflicts. In addition, there may be issues about matching the type of space delivered to demand in that area.
- 10.80 Where the development lies within an area of low industrial and office demand (i.e. areas with high vacancy rates at present), subject to the legal provisions governing such approaches, funding from sources such as CIL/S106 contributions could be pooled and used to develop workspace space on other sites, perhaps including those in Council ownership, and loans or grants to firms to support upgrading of premises. This could also potentially be used to fund further enterprise or incubation workspace.
- 10.81 If there are areas where large-scale change may be required in order to deliver workspace, a **Planning Brief or Development Brief** could be considered as a tool for identifying how new development should come forward.

- 10.82 **Local Development Orders (LDO)** is another potential mechanism that could be considered in some appropriate situations. These allow Councils to identify specific areas/sites where express planning permission is not required for certain types of development. Examples applying to industrial estates, for example, could include alterations or certain levels of extensions to premises, construction of new employment premises within specified limits, and some types of change of use. In some situations, this approach could provide benefits to occupiers/developers through greater flexibility, speed, certainty of outcome and reduced cost.

Summary

- 10.83 Previous sections of this report have highlighted the need for a quantitative increase in the office and industrial stock of around 45ha (gross) to 2029. However, barriers to the redevelopment / improvement of industrial sites in particular remain, primarily as a result of low commercial values and competing higher value uses in some locations. At present, whilst there appears to be a quantitative oversupply of employment land, the stock is unbalanced, with an oversupply in the western part of the Borough and an under-supply in the A6 Corridor and to a lesser extent Poulton-le-Fylde.
- 10.84 Based on the site analysis work, the portfolio has been refined to around 40.3ha (net) relating to 29 sites, plus the potential for two more mixed use sites that could provide an additional employment land element totalling around 8.6ha. A number of sites are also identified for reservation for port related uses, energy generation and expansion land for existing businesses. 9 existing employment sites/allocations are also identified for de-allocation from the portfolio (totalling 25.5 ha net).
- 10.85 A number of planning and economic development interventions could significantly improve the level of development and premises renewal activity including continued policy protection for B-class land, use of BID schemes, and engaging with land owners.
- 10.86 A number of mechanisms can be used to facilitate the delivery of workspace. These include using mixed use developments, S106 agreements and/or Community Infrastructure Levy to pay for workspace either on-site or off-site. However, any new provision should ensure that the layout, location and type of space is attractive to the market rather than purely focusing on the quantum of space delivered.

11.0

The Scope for New Commercial Leisure Facilities

Introduction

11.1

This section provides an assessment of the future growth and floorspace requirements of commercial leisure facilities in Wyre Borough to 2029, using quantitative and qualitative approaches to project demand and need.

Commercial Leisure Trends

11.2

The demand for commercial leisure facilities has increased significantly during the last 25 years. The growth in the commercial leisure sector was particularly strong during the late 1980s and again in the mid 1990s. Average household expenditure on leisure services increased in real terms by 93% between 1984 and 1995 (source: Family Expenditure Survey), and by a further 48% between 1995 and 2005. However growth has been more limited since 2005. Many analysts consider that the commercial leisure market has now reached saturation in some sub-sectors, such as bingo, multiplex cinemas and tenpin bowling. The economic downturn since 2008 will have curbed further growth in leisure spending as the leisure sector is an early casualty of reduced disposable income.

11.3

The mid-1990s saw the expansion of major leisure parks which are generally anchored by a large multiplex cinema and offer other facilities such as ten-pin bowling, bingo, nightclubs, health/fitness clubs, themed destination restaurants, pub/restaurants, children's nurseries and budget hotels. Commercial leisure facilities have typically been located on the edge of town centres or out-of-centre, with good road access. Many leisure uses have also emerged on retail warehouse parks. This type of development is most evident in the surrounding major centres of Blackpool and Preston and less of a feature in Wyre Borough, albeit Jubilee Leisure Park accommodates a Vue cinema (8 screens), ice skating rink and a number of restaurants.

11.4

The cinema market remains an important sector as this is often the anchor leisure use and provides footfall for other uses. However, growth has slowed significantly in recent years with many areas reaching saturation levels. Notwithstanding this, operators such as City Screen, Mainline Pictures and Reel Cinemas have opened new or taken over small cinemas in recent years and Cineworld recently confirmed that it is on track to open a further 25 locations by the end of 2017. Although the private health and fitness market has remained strong, it is the no-contract, budget operators such as The Gym Group, Pure Gym and easyGym that are currently seeking premises across the UK and continue to grow rapidly. The economic downturn and squeeze on disposable income has had an impact on established multiple operators, most notably Fitness First, which was recently forced to close a number of gyms as a result of falling membership revenues.

Operator Demand

Operator Demand Questionnaire

- 11.5 To assess the potential future growth and floorspace requirements of leisure businesses currently located in Wyre, a questionnaire survey was sent to 100 operators in July 2012. Despite following up the original mailing with a reminder, the response rate remained at 10% which suggests that the level of requirements in the Borough is low.
- 11.6 The majority of businesses contacted are independents operating from one location. It is likely that many single-location small businesses will be in a settled pattern of trading without any aspiration to expand through an increase in the number of settlements. Seven of the ten businesses that responded stated that they had no plans to expand.
- 11.7 Two businesses that stated they had requirements for more floorspace are pub operators based in the Fylde Coast. Neither company has a requirement for development sites but both have a requirements for suitable existing premises.
- Amber Taverns is based in Blackpool and has around 80 public houses across the North of England, the majority of which are in the North West. In Wyre, the company has requirements for suitable existing premises of 1,800-3,000 sq. ft in Cleveleys, Poulton and Garstang town centres.
 - Fuzzy Duck Brewery is currently located on Poulton Industrial Estate, but will be relocating to Fleetwood in the final quarter of 2012. Fuzzy Duck Inns Ltd recently bought the Strawberry Gardens Hotel in Fleetwood to operate as a real ale pub offering "the largest selection of real ales on the Fylde Coast". Currently trading from the ground floor, the company proposes the conversion of the first floor to bar/restaurant use, with a bed and breakfast operation occupying the second floor.
- 11.8 The third requirement is from a gymnastics club intending to extend its existing premises.
- 11.9 Premises requirements collated by the Council over the last five years record five enquiries for leisure properties and a further four enquiries for industrial properties to accommodate leisure activities (soft play, archery and martial arts). None of these enquiries related to a specific site.
- 11.10 The new survey indicates that there is unlikely to be demand for sites from amongst the Borough's existing commercial leisure operators. It provides no evidence of a qualitative need to allocate sites for leisure purposes.

The Potential for Leisure and Entertainment Uses

Catchment Potential

- 11.11 In general, commercial leisure facilities will draw the main part of their trade from residents living within a radius of up to 20 minutes travel time. Major

leisure facilities such as multiplex cinemas, ten-pin bowling centres, ice rinks and family entertainment centres require a large catchment population, and often benefit from locating together on large out of centre leisure parks.

- 11.12 The population of Wyre Borough at 2012 is approximately 112,000 (based on sub-national population projections, published March 2012), which provides a sizeable catchment. However, residents in Wyre Borough have good access to major leisure facilities in Blackpool, Lancaster and Preston. The proximity of these centres limits the catchment area and potential for new commercial leisure facilities within Wyre Borough.

Methodology

- 11.13 Where possible, the results of the NEMS household survey undertaken in January/February 2010 to inform the Fylde Coast Retail Study have been utilised to quantify the requirement for new commercial leisure facilities in Wyre Borough.
- 11.14 Where this data does not provide the information required, an analysis of typical patronage rates per head of population has been undertaken and standard benchmarks applied. This is then compared against existing commercial leisure provision in Wyre Borough to identify if there is any requirement for additional facilities.
- 11.15 NLP is not aware of any existing commitments for additional commercial leisure provision in Wyre Borough that should be factored into this assessment.

Health and Fitness Facilities

- 11.16 There are a number of public and private health and fitness clubs in Wyre Borough including:
- i Optimum Gym, Thornton-Cleveleys;
 - ii Thornton YMCA, Thornton-Cleveleys;
 - iii Ladies Fitness & Wellness, Thornton-Cleveleys;
 - iv Fenton Fitness, Garstang;
 - v Garstang YMCA, Garstang;
 - vi Body Quest, Fleetwood;
 - vii Fleetwood YMCA, Fleetwood;
 - viii FX Leisure, Poulton-le-Fylde;
 - ix Hard Knocks Gym, Poulton-le-Fylde; and
 - x Poulton YMCA, Poulton-le-Fylde.
- 11.17 The adult population of Wyre Borough is estimated at around 88,000 residents in 2012, which could generate demand for about 10,560 public and private membership places, based on the national average membership rate of 12%. This figure and the 10 public and private health and fitness clubs identified above imply an average of around 1,056 members per club, which is slightly

lower than the national average for private fitness clubs (1,375 members). This suggests that there is not any sustainable demand for additional health and fitness clubs in Wyre Borough at present. More likely is that there is a need, where possible, for improvements to existing provision to improve participation rates.

- 11.18 The findings of the above assessment are consistent with a consultation exercise carried out by Max Associates to inform the Wyre Council Leisure Review (published in July 2012). The report comprises a review of existing leisure facilities operated by YMCA in Wyre Borough (Thornton, Garstang, Poulton and Fleetwood) and suggests a strategy for meeting the future leisure needs of the community. The results of the consultation exercise (undertaken in January 2012) indicate that the availability of good quality facilities is a barrier to participation and there is a requirement for investment. In particular, it was identified that facilities in Thornton are not fit for purpose in the longer term due to the condition of the buildings and the high excess demand for certain facilities (indoor courts), with a proposed solution being redevelopment to include for extreme sports such as skating and 'clip and climb', as well as a 8 lane tenpin bowling alley.

Cinemas

- 11.19 There is one cinema within Wyre Borough at Jubilee Leisure Park, Thornton-Cleveleys (8-screens operated by Vue, with 1,066 seats). However, there are existing facilities within nearby centres, including Blackpool, Preston and Lancaster which draw on the Wyre catchment area and will restrict of potential additional cinema provision in the Borough. Cinemas serving the Wyre Borough catchment are:
- Odeon, Blackpool (10 screens, 2,694 seats)
 - Odeon, Preston (10 screens, 1,895 seats)
 - Vue, Lancaster (6 screens, 1,574 seats)
 - Vue, Preston (7 screens, 1,848 seats)
- 11.20 To assess the demand for cinemas within Wyre it is assumed that a maximum of up to 50% of cinema trips can be retained within the Borough (based on the proximity of existing facilities in nearby centres). The catchment potential has then been converted into a total number of expected cinema screens and seats, which is calculated by dividing the population by the current national average (16,300 people per screen and 78 people per seat). The results of this exercise are shown in Table 11.1.

Table 11.1 Cinema Potential in Wyre Borough

	2012	2017	2022	2029
Wyre Borough Population	111,938	114,632	117,725	121,615
	3.4	3.5	3.6	3.7
	718	735	755	779
Existing Seat Provision	1,066	1,066	1,066	1,066

11.21 The above analysis suggests the existing cinema provision in Wyre Borough is sufficient to meet existing demand in terms of the number of screens and seats. Even at 100% market retention (i.e. residents of Wyre using only the existing Vue cinema), there would still be an overprovision of cinema screens and seats in the Borough.

Restaurants and Cafes/Pubs and Bars

11.22 Food and drink establishments (Class A3, A4 and A5) including restaurants, cafes, bars and pubs typically support other major leisure uses on leisure and retail parks. National information available from Experian Goad indicates that the proportion of non-retail uses within town centres across the country has increased over the last decade as shown in Table 11.2.

Table 11.2 GB Goad Plan Town Centres Use Class Mix

Type of Unit	% Change 2000 to 2011	Proportion of Total Number of Units (%)			
		2000	2005	2009	2011
Class A1 (Retail)	- 15.4	59.1	56.4	54.0	50.0
Class A1 (Services)	+ 31.7	8.2	9.6	9.8	10.8
Class A2	- 4.5	8.9	8.9	9.0	8.5
Class A3/A5*	+ 41.1	11.2	13.7	14.5	15.8
Miscellaneous	-14.3	1.4	1.4	1.3	1.2
Vacant/under Const.	+22.3	11.2	10.1	11.4	13.7
Total	-	100.0	100.0	100.0	100.0

Source: Goad Centre Reports *excludes Bars/Public houses (A4)

11.23 The proportion of Class A1 retail uses in town centres surveyed by Experian Goad decreased by 15% in the period 2000 to 2011, whilst Class A3/A5 uses and vacant units have increased. Growth in Class A3 to A5 uses within town centres is likely to continue in the future, and will compete for shop premises with other town centre uses. A balance between Class A1 and Class A3 to A5 uses needs to be maintained.

- 11.24 NLP has reviewed the number of Class A3/A4/A5 uses within Wyre Borough which indicates that there is a strong representation of cafes and fast food outlets, particularly in Fleetwood and Thornton-Cleveleys. This is to be expected in centres which cater to the tourist market and is within the range that would be anticipated relative to the size and role of Wyre Borough²⁰.

Nightclubs

- 11.25 There are approximately 1,750 nightclubs in the UK, which equates to approximately one per 30,000 people (source Mintel). Large nightclubs (capacity up to 2,000 people) are generally located in large towns with a population of over 100,000 people. There is currently only one nightclub in Wyre (Residence in Poulton-le-Fylde). Although this implies a qualitative need for additional provision, it is considered that viability would be questionable in this instance as a result of the abundance of nightclubs in nearby Blackpool, Preston and Lancaster.

Bingo Halls/Casinos

- 11.26 The adult population of Wyre Borough (approximately 88,000 residents) could generate about 154,000 bingo hall admissions based on the national participation rate (1.75 trips per adult) and an average of 113,000 admissions per club.
- 11.27 Olympia in Thornton-Cleveleys is the only bingo hall in Wyre Borough. Based on the average admissions per club, there may be capacity for a further bingo hall in the area but existing bingo facilities in Blackpool (Empire and Mecca) and Preston (Gala and Club 3000) are likely to reduce the commercial viability of new facilities in the Borough.
- 11.28 There were 144 licensed casinos operating in Great Britain at March 2008, which equates to approximately one casino per 400,000 people. Attendance at casinos by members and guests was 16 million trips in 2008. There are no casinos within Wyre Borough, but nearby Blackpool has four casinos. Wyre Borough does not have a catchment population large enough to support a casino and it is a certainty that operators' requirements are better met in Blackpool and Preston.

Family Entertainment Centres

- 11.29 The Sub-Zero Ice Arena at Jubilee Leisure Park in Thornton-Cleveleys and indoor leisure facilities such as 'Thingamajigz' and 'Madhatters' children's play centres in Poulton-le-Fylde and Thornton-Cleveleys provide the main family entertainment facilities in Wyre Borough.

²⁰ Facilities listed for Garstang and Poulton also includes provision in surrounding villages

- 11.30 Indoor play centres are a growing area in the commercial leisure sector and are becoming more common in less central locations. As such facilities are an emerging trend it is difficult to determine whether there is any latent demand for additional provision in Wyre Borough. If such proposals are forthcoming, it is an important planning consideration to ensure that they are sited in appropriate locations.
- 11.31 There are no bowling alleys in Wyre Borough and the population as a whole could theoretically support up to 10 lanes, based on one lane per 12,000 people. However, these figures assume 100% retention of tenpin bowling trips, which is unlikely, on the basis that there are large bowling facilities in nearby Blackpool, Preston (both Lakeside Superbowl) and Lancaster, which will limit the commercial potential in Wyre Borough. It is understood that future proposals for the redevelopment of Thornton Leisure Centre could include the provision of a 8 lane tenpin bowling alley, which would be commensurate with the identified capacity for facilities.

Theatres/Music Venues

- 11.32 The household survey indicates that approximately 52% of respondents in Wyre Borough visit theatres/music venues, with Manchester City Centre and Blackpool the destinations visited by the greatest proportion of residents.
- 11.33 The current provision of theatres/music venues (Thornton Little Theatre, Thornton-Cleveleys and Marine Hall, Fleetwood) and the fact that the Wyre catchment is already served by theatres in larger surrounding towns suggests that there is limited scope for new privately operated theatres in the Borough.

Comparison of Leisure Provision with Similar Authorities

- 11.34 In order to understand whether there are any clear deficiencies in the commercial leisure performance of Wyre, a comparison with the provision found in a similar Borough is undertaken. Of the eight local authorities initially selected for this assessment (Great Yarmouth, Redcar and Cleveland, Carlisle, East Lindsey, Copeland, Allerdale, Scarborough and Neath Port Talbot), it was concluded that Allerdale is most similar to Wyre Borough in terms of population and demographic profile. The scale of the main centres within Allerdale Borough (Workington, Cockermouth, Maryport and Keswick) is also comparable with those of Wyre Borough.
- 11.35 A summary of the existing commercial leisure provision in Wyre Borough and Allerdale Borough is set out in Table 11.3. This comparison exercise has identified that Wyre has a similar number of health and fitness centres, bingo halls/casinos and family entertainment centres to Allerdale. Although cinema provision appears to be higher in Allerdale, the actual number of screens (8) is the same as Wyre as two of the facilities operate with a single screen.

- 11.36 The key difference in the commercial leisure offer of Wyre and Allerdale Borough is the provision of restaurants and cafes. This is partly due to the strong representation of cafes and fast food outlets that cater for the tourist market in Wyre Borough, as well as a number of pubs being recorded as restaurants on the basis that they serve food.
- 11.37 There is a greater provision of theatre/music venues in Allerdale Borough. However, these facilities mainly cater for the local population, which reflects the self-sustaining nature of the Borough and its distance from major cities.

Table 11.3 Comparison of leisure provision

Facility	Number of units	
	Wyre	Allerdale
Health and fitness clubs	10	11
Cinemas	1 (8 screens)	3 (8 screens)
Bingo halls and casinos	1	1
Theatres/Music venues	1	4

Source: NLP research 2012

Summary

- 11.38 The provision of large commercial leisure and entertainment facilities in Wyre Borough is limited which reflects the proximity of the higher order centres of Blackpool, Lancaster and Preston. Residents of Wyre Borough have good access to destinations in these centres and this will limit the scope for additional commercial leisure provision.
- 11.39 Key sectors, including health and fitness clubs, cinemas, restaurants/ cafes, bingo and nightclubs are present within Wyre Borough. Although there is no ten pin bowling or casino provision, the above assessment suggests that existing commercial leisure facilities are either sufficient to support the demands of the local population. Market demand for those uses which are currently not present in Wyre Borough are likely to be limited. A comparison of commercial leisure performance between Wyre Borough and Allerdale Borough has identified that there are no clear deficiencies in provision.
- 11.40 It is not considered that there is any requirement for the Council to plan for additional leisure commercial leisure development in the Borough to 2029, albeit it is recognised that there is a need to improve existing YMCA health and leisure facilities (which may include the provision of a tenpin bowling alley). Rather than being plan led, planning applications for new commercial leisure facilities should be determined with on a case by case basis. Furthermore, WBC may wish to consider a policy-based approach in the emerging Local Plan that could specify that, in instances where a particular leisure proposal was

likely to generate significant levels of employment and would not risk prejudicing the successful operation of an existing employment site, it could be considered favourably.

12.0

Conclusions

12.1

The following conclusions can be drawn from this study on the future requirements for employment space and commercial leisure in Wyre Borough.

Wyre's economy has undergone significant structural change in recent years, although prior to and even during the recession the local economy grew at rate above national and regional averages. The Borough faces particular challenges from forthcoming public sector cuts and relocations.

12.2

Prior to the recession, the local economy in Wyre performed relatively well, recording strong increases in the size of the local business base and the number of jobs in the Borough. This was driven by significant growth in sectors including Public Administration and Defence; Electricity, Gas and Water Supply; Construction; and Education. As a result, unemployment rates in the Borough remain relatively low compared to the national and regional averages. However, this overall figure masks pockets of relatively high deprivation, particularly in the Fleetwood area. Furthermore, the Borough has a high level of out-commuting and has had limited high quality B1/B8 inward investment to counterbalance the area's industrial manufacturing legacy. Accessibility issues in the westernmost part of the Borough and significant levels of congestion on the main north-south route, means that particular challenges remain if Wyre is to avoid economic isolation.

12.3

The legacy of the recession(s) and public sector cuts will undoubtedly place significant strains on the local economy over the short to medium term, with Wyre highly vulnerable to further public sector job cuts and relocations, including the DWP move from Norcross. It has been estimated that the Borough could lose around 5,500 public sector jobs over the coming years, resulting in a total loss to the local economy of around £250m GVA. There are, however, a number of opportunity sectors that offer optimism for the future and will dictate the need for employment land in the Borough, specifically opportunities for the renewable and environmental technology sectors; shale gas fracking, and continued advanced manufacturing investment.

Past take up of land has been relatively low and distorted by the Lancashire Waste Technology Park development.

12.4

Past take up of employment land in Wyre has historically been moderate, averaging around 3.3ha over the past 11 years. The period over which take-up has been measured spans a period of strong economic growth, the recession and subsequent low growth. The take-up figures should therefore be reasonably representative of requirements for land over the long term. However the figures are distorted by an unusually large development – the 13.3 ha for the Lancashire Waste Technology Park in 2010-11, which represents 45% of all land developed in Wyre over the last nine years. Without this, annual average take-up falls to 2.1ha.

- 12.5 This development aside, much of the employment land developed has been located at the Hillhouse Secure Site, and often related to the chemical sector which tends to have much larger site requirements than other businesses within Wyre. From discussions with stakeholders it is generally considered that there is significant demand for new units in the more rural areas of the Borough and particularly around Garstang; however, the fact that there has been so little take up in this area suggests that the quality of available employment sites in this area does not fit with developer/occupier requirements.

The Borough requires around 45ha (gross) to meet employment land needs up to 2029.

- 12.6 Based on projecting forward past trends and allowing for the re-provision of likely losses to non-B-class uses, it is suggested that Wyre Borough could require in the order of 80ha gross 2011-29. However, this stands in contrast to the demand forecasts based on the Experian Baseline econometric model. This would indicate a requirement for 34ha gross over the same time period, with a bias towards B1a office and B8 warehousing. A scenario based solely on projecting forward past job growth levels indicates a level of need around 51ha (weighted more towards B8 provision).
- 12.7 Two labour supply sensitivity tests indicate a similar level of need due to the forecast stabilisation of economically active residents over the plan period, with commensurate implications for the number of jobs required, at around 42ha over the plan period.

Table 12.1 Summary Employment Land Scenarios 2011-29

	Scenario	Net	Gross
	Experian Baseline	-8.48ha	+33.87ha
	Past Trend Jobs	+8.50ha	+50.85ha
Past Take Up	Take Up Projections	+37.98ha	+80.33ha
	ONS SNPP 2010-based population projections	-0.62ha	+41.73ha
Labour Supply	Housing Needs Requirement – PopGroup Baseline	+0.35ha	+42.70ha

- 12.8 On the basis of these considerations, it is considered that around **45ha (gross)** of employment land may be considered appropriate to 2029. The figure accommodates opportunities for Wyre to develop a competitive advantage in the renewables and energy generation sectors (recognising that some of these uses would be classified as Sui Generis, rather than strictly B Class uses) alongside the established manufacturing strength, whilst factoring in the uncertainty of the ongoing economic downturn and public sector relocations.

The Borough has a good supply of available employment land in quantitative terms, although much of this appears to be located in areas of weak market demand. Rebalancing the portfolio comprises a key challenge for the Borough's future economic success.

12.9 In basic quantitative terms, the Borough appears to have a substantial amount of employment land of around 83ha net (comprising allocated and 'available' vacant sites within existing employment areas). However, the portfolio is geographically unbalanced, with the majority of allocations in the urban west of the Borough and limited provision in the rest of Wyre.

12.10 The location of employment sites in Wyre has largely been determined by historic factors. In the urbanised western part of the Borough, there remains some potential for reducing the scale of employment land provision. In contrast, in the A6 Corridor there remains some pressure for new employment areas to come forward.

Following a detailed review of all employment areas and allocations in Wyre Borough, it is recommended that the Borough's portfolio should comprise 29 employment sites, totalling 40.3ha (net) of employment land with the potential for a further 8.6ha of land allocated as part of two larger mixed use schemes. WBC may also require further mixed use allocations on currently unallocated sites.

12.11 The characteristics and quality of provision of 41 individual employment areas of the Borough were assessed, plus sites at the soon to be vacated DWP complex at Norcross and seven further sites that came forward as part of WBC's call for sites exercise. Issues reviewed included each area's locational context; accessibility; constraints; existing sectoral mix; size and type of businesses; amount of floorspace required; scope for windfall; compliance with planning policy; market attractiveness and likelihood and viability of site redevelopment. The full assessment is summarised in Appendix 6, with the individual site pro-formas in Appendix 2.

12.12 Table 12.2 indicates that the current portfolio of land should be rebalanced with **around 40.3ha net of land being allocated in the Local Plan for B-class employment use**, which includes most of the soon to be vacated DWP site at Norcross. This would leave a shortfall of around 5ha.

12.13 To address this shortfall, 7 potential sites were assessed as part of the call for sites exercise. Of these sites, it was concluded that Catterall Gates Lane South and Land west of the A6 could best meet any additional land requirements for the A6 corridor, although speculative development of employment use in any of these locations would not be viable and would be likely to require an element of mixed use. The Brockholes extension would comprise a less sustainable mixed use extension than these two sites, although a flexible approach should be taken regarding any future applications regarding the north-west corner of this site to support the expansion of a successful existing business.

Table 12.2 Resultant Portfolio of Employment Land (net) in Wyre Borough to 2029

Proposal	Number of Sites	Gross Site Area (ha)	Net Developable Area (ha)	Net Employment Area (ha)
Retain Current Employment Allocation	9	9.00	8.14	8.14
Allocate vacant land within existing employment area for B-Class use	13	25.00	22.26	22.26
Employment land component of re-allocated Mixed Use sites	2	9.43	8.06	5.37
Employment land component of Mixed-Use redevelopment at Norcross	5	9.60	9.12	4.56
Employment Land Portfolio	29	53.03	47.58	40.33
Employment land component of Mixed-Use	1	4.33	3.68	1.84
Employment land component of Mixed-Use redevelopment at West of A6, Garstang	1	16.00	13.60	6.80
Potential Employment Land Portfolio	2	20.33	17.28	8.64
Reserve for Port Related Use	1	7.06	6.00	6.00
Reserve for Energy Generation	2	13.50	13.50	13.50
Reserve for Expansion Land	4	17.37	12.68	12.68
Other Employment Land Portfolio	7	37.93	32.18	32.18
Allocate as Mixed-Use without Employment Component	4	3.63	0.86	0.86
Deallocate	9	28.96	25.46	25.46
Potential sites not to be taken forward	6	11.51	9.95	9.95
Sites to be Excluded From Portfolio	19	44.10	36.27	36.27
TOTAL	57	155.39	133.31	117.42

12.14

Clearly, any site-specific recommendations contained within this document cannot be viewed in isolation. Recommendations will need to be taken forward and tested through the proper preparation of policy by WBC and subject to suitable consultation as part of its Local Plan preparation process.

The Council should adopt a proactive approach to managing and improving the existing portfolio of employment sites to facilitate future growth.

- 12.15 Alongside making new allocations, WBC should adopt a proactive approach to managing and improving the existing portfolio of employment sites to facilitate future growth. Renewal and intensification on older sites with available land should be encouraged to ensure that they contribute positively to meeting some of the Borough's employment land requirements, taking account of the particular constraints that apply on individual sites. In assembling a new portfolio of sites, a cautious approach would be required to manage the competing pressures on potential employment sites within Wyre, balancing the aspirations for mixed-use development on some sites with the need to encourage renewal and intensification of the older industrial estates. Where mixed-use development or potential release of an employment site to other uses is contemplated, this should have regard to the availability of alternative sites to accommodate the relocation of firms.

Meeting the economic needs of rural areas is key to the long term sustainability of Wyre's outlying settlements.

- 12.16 Beyond the A6 Corridor, the smaller scale of rural premises likely to be needed, combined with the environmental designations covering much of the remaining rural parts of the Borough and lower level of demand for office and industrial space, probably does not require any specific land allocations, where low rents may not justify new development and which may therefore not be taken up. However, rural tourism and its related sectors have the potential to stimulate employment in the Borough.

- 12.17 It is recommended that rural needs could be more effectively met instead through conversions of redundant rural buildings and other smaller scale developments, without the need for specific allocations. New provision could be encouraged through flexible and responsive policy support for rural building conversions to business uses and for other smaller scale industrial developments within settlements.

Given the current provision of leisure facilities in Wyre, it is not considered that there are any specific shortages that would need to be addressed in the Local Plan.

- 12.18 The provision of large commercial leisure and entertainment facilities in Wyre Borough is limited and reflects the proximity of the higher order centres of Blackpool, Lancaster and Preston. Residents of Wyre Borough have good access to destinations in these centres and this will limit the scope for additional commercial leisure provision.

- 12.19 Key sectors, including health and fitness clubs, cinemas, restaurants/ cafes, bingo and nightclubs are present within Wyre Borough. Although there is no ten pin bowling or casino provision, existing commercial leisure facilities are sufficient to support the demands of the local population. It is not considered that there is any requirement for the Council to plan for additional leisure commercial leisure development in the Borough to 2029. Rather than being plan led, planning applications for new commercial leisure facilities should be

determined with on a case by case basis. Furthermore, WBC may wish to consider a policy-based approach in the emerging Local Plan that could specify that, in instances where a particular leisure proposal was likely to generate significant levels of employment and would not risk prejudicing the successful operation of an existing employment site, it could be considered favourably.

Appendix 1 List of Consultees

- Wyre Borough Council – Economic Development Section;
- Blackpool Bay Development Corporation;
- Blackpool Borough Council - Planning Department;
- Fylde Borough Council – Planning Department;
- Fylde Borough Council – Economic Development Department;
- Lancashire County Council - Economic Development Department;
- Lancashire County Council - Planning Department;
- Lancashire Economic Partnership;
- Garstang District Partnership;
- Wyred Up;
- NPL Estates;
- Over Wyre;
- Preston City Council – Planning Department;
- Fleetwood Chamber of Trade and Commerce;
- Cleveleys Association of Commerce and Trade;
- Garstang Chamber of Trade;
- Associated British Ports.

Appendix 2 Site Pro-formas

Appendix 3 Viability Appraisals

**FINANCIAL VIABILITY APPRAISAL
OF
OFFICE REDEVELOPMENT ON 1.8 HECTARE PLOT AT NORCROSS**

REVENUE**Rental Area Summary**

	m²	Rate m²	Initial MRV/Unit	Net Rent at Sale
Offices	6,120.00	£110.00	£673,200	673,200

Investment Valuation**Offices**

Market Rent	673,200	Y.P. @	8.5000%	11.7647	
(0yrs 3mths Rent Free)		PV 0yrs 3mths @	8.5000%	0.9798	7,760,108

GROSS DEVELOPMENT VALUE

Purchaser's Costs	5.63%	(436,506)		7,760,108	
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NET DEVELOPMENT VALUE

7,323,602

NET REALISATION

7,323,602

OUTLAY**ACQUISITION COSTS**

Fixed Price (1.80 Ha £150,000.00 pHect)			270,000	
Stamp Duty		3.00%	8,100	
				278,100

CONSTRUCTION COSTS

Construction	m²	Rate m²	Cost	
Offices	7,200.00	£900.00	6,480,000	6,480,000
Contingency		3.00%	194,400	
				194,400

PROFESSIONAL FEES

Total Professional Fees	10.00%	648,000		648,000
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MARKETING & LETTING

Marketing			15,000	
Letting Agent Fee	10.00%		67,320	
Letting Legal Fee	5.00%		33,660	
				115,980

DISPOSAL FEES

Sales Agent Fee	1.00%		73,236	
Sales Legal Fee	0.50%		36,618	
				109,854

Additional Costs

Arrangement Fee			5,000	
				5,000

FINANCE

Debit Rate 7.000% Credit Rate 0.000% (Nominal)				
Other			30,263	
Total Finance Cost				30,263

TOTAL COSTS

7,861,597

PROFIT / LOSS

(537,995)

FUNDING REQUIREMENT TO ACHIEVE 20% PROFIT ON COST

2,110,314

Performance Measures

Profit on Cost%	(6.84)%
Profit on GDV%	(6.93)%

**FINANCIAL VIABILITY APPRAISAL
OF
RESIDENTIAL REDEVELOPMENT OF 1.8 HECTARE PLOT AT NORCROSS**

Summary Appraisal

REVENUE					
Sales Valuation	Units	m²	Rate m²	Unit Price	Gross Sales
	50	6,500.00	£1,846.15	£240,000	12,000,000
NET REALISATION					12,000,000
OUTLAY					
ACQUISITION COSTS					
Residualised Price (1.80 Ha	£1,686,757 / Hat)			3,036,163	
Stamp Duty		4.00%	121,447		
Agent Fee		1.00%	30,362		
Legal Fee		0.50%	15,181		
Town Planning			40,000		
Survey			5,000		
				3,248,152	
CONSTRUCTION COSTS					
Construction	m²	Rate m²	Cost	4,647,500	
	6,500.00	£715.00	4,647,500		
Contingency		3.00%	139,425		
Demolition			400,000		
Statutory/LA			15,000		
				554,425	
PROFESSIONAL FEES					
Architect		10.00%	504,750		
				504,750	
MARKETING & LETTING					
Marketing			400,000		
				400,000	
DISPOSAL FEES					
Sales Agent Fee		1.00%	120,000		
Sales Legal Fee		0.50%	60,000		
				180,000	
FINANCE					
Debit Rate 7.000% Credit Rate 0.000% (Nominal)					
Land			270,231		
Construction			194,942		
Total Finance Cost				465,173	
TOTAL COSTS					10,000,000
PROFIT					2,000,000
Performance Measures					
Profit on Cost%		20.00%			
Profit on GDV%		16.67%			

Appendix 4 Employment Land Take Up

Take up rates on Employment Allocated Land - 2003-2012

Fleetwood Docks Mixed Use Development Area	Fleetwood	B1, B2, B8	3.3	0	0	0	0	0	0	0	0	0	3.3
Fleetwood Docks Employment Area	Fleetwood	B1, B2, B8	10.97										10.97
Hillhouse Secure Site	Thornton	B2	59.5	0	0	4.09	1.68	0.26	0.03	0.96	0.22	1.35	51.12
Red marsh Industrial Estate	Thornton	B1, B8	0.2	0	0	0	0	0	0	0	0	0	0.38[5]
Burn Hall Industrial Estate	Thornton	B1, B2, B8	26.1	0	0.08	0	0	0	0	0	0	0.75	2.25
Lancashire Waste Technology Park	Thornton	B2		0	0	13.3	0	0					
Land East of Fleetwood Road	Thornton	Mixed Use	12.5	0	0	0	0	0	0	0	0	0	6
Wyre Borough Adopted Local Plan (Adopted July 1999)		AAP Total	112.57	0	0.08	4.09	1.68	0.26	0.03	0.96	13.52	2.1	74.02
Copse Road, Fleetwood	Fleetwood	B1	0.6	0	0	0	0	0	0	0	0	0	0.6
West of A585, Fleetwood	Fleetwood	B1, B2, B8	0.4	0	0	0	0.4	0	0	0	0	0	0
Off Denham Way, Fleetwood	Fleetwood	B1, B2, B8	0.7	0.32	0	0	0	0.12	0	0	0	0	0.26
Station Road, Poulton-le-Fylde	Poulton-le-Fylde and Carleton	B1	0.3	0	0	0	0	0	0	0	0	0	0.3
Aldon Road, Poulton Industrial Estate	Poulton-le-Fylde and Carleton	B1, B2, B8	2.5	0.35	0	0	0	0	0	0	0	0	0.89
Clarke Street, Poulton Industrial Estate	Poulton-le-Fylde and Carleton	B1, B2, B8	0.8	0	0	0	0	0	0	0	0	0	0
Furness Drive, Poulton Industrial Estate (three sites)	Poulton-le-Fylde and Carleton	B1, B2, B8	0.9	0	0	0	0	0	0	0	0	0	0.16
Cocker Avenue, Poulton Industrial Estate (three sites)	Poulton-le-Fylde and Carleton	B1, B2, B8	2.7	0.23	0	0	0	0	0	0	0	0.47	0
Beacon Road, Poulton Industrial Estate (two sites)	Poulton-le-Fylde and Carleton	B1, B2, B8	0.8						0	0	0	0	0
SE of Wyrefields, Poulton Industrial Estate (two sites)	Poulton-le-Fylde and Carleton	B1, B2, B8	3.3	0	0	1.14	0	0	0	0	0	0	0
Taylors Lane, Pilling	Central Rural	B1, B2, B8	0.7	0	0	0	0	0	0	0	0	0	0.7

	Plain												
West of A6, Kirkland	Garstand and Catterall	B1, B2, B8	0.8	0	0	0	0	0	0	0	0.8	0	0
Land at Longmoor Lane, Nateby	Garstand and Catterall	B1, B2, B8	0.9	0	0	0	0	0	0	0	0	0	1.3[9]
Garstang Creamery, Garstang	Garstand and Catterall	B1, B2, B8	1	0	0.58	0	0	0.02	0	0	0	0	0
Catterall Gates Lane, Catterall (North)	Garstand and Catterall	B1, B2, B8	3.8	0	0.04	0	0	0	0	0	0	0.54	3.22
Lancaster Old Road, Claughton (two sites)	Garstand and Catterall	B1, B2, B8	3.9	0.74	0	0	0	0	0	0	0	0	0.38
Land South of ICI, Thornton	Thornton	N/A	3.3	0	0	0	0	0	0	0	0	0	0
Land at Catterall Gates Lane, Catterall (South East)	Garstand and Catterall	B1, B2, B8	2.5	0	0	0	0	0	0	0	0	0	2[11]
Wyre Borough 1st Deposit Draft (Never Adopted)		WBLP Total	29.9	1.64	0.62	1.14	0.4	0.14	0	0	0	1.01	9.81
Land at Catterall Gates Lane, Catterall (South West)	Garstand and Catterall	B1, B2, B8	2.2	0	0	0	0	0	0	0	0	0	2.721
		1st DD Total	2.2	0	0	2.7							
		Total	144.67	1.64	0.7	5.23	2.08	0.4	0.03	0.96	14.32	3.11	86.53

Appendix 5 Adjustments to Gross/Net Ratios

GROSS TO NET ADJUSTMENTS IN EMPLOYMENT LAND ASSESSMENTS

Take-up of employment land is typically recorded on a plot by plot basis, which equates to a net developable area. To be consistent, availability should be measured on the same basis. So for some sites, gross to net adjustments may be appropriate.

We have considered each site and estimated the proportion of land likely to be lost to servicing and landscaping, having regard to gross to net ratios achieved on industrial estates and business parks elsewhere in the region. Research by storeys:ssp has shown that ratios range from 100% where a site is in single occupation, to 56% for a business park on a sloping site with large areas set aside for landscaping and sloping banks between development plots.

Adjustments appropriate in different circumstances are set out below.

GROSS TO NET RATIOS ADJUSTMENTS FOR EMPLOYMENT LAND

Type	Ratio	Comment
Serviced plot on industrial estate fronting road.	100%	
Area of land that could easily subdivide into serviced plots with road frontage.	100%	
Large area of land on industrial estate too big for single scheme, having regard to other buildings on estate.	95%	Provision for spur road.
Major undeveloped part of industrial estate or extension to industrial estate.	90%	Provision for roads and landscaping to one or more sides.
Small local allocation, requiring infrastructure.	90%	Provision for spur road, but landscaping likely to be minimal.
Level site allocated for industrial estate.	85%	Provision for spur road and landscaping.
Site allocated for industrial estate where terracing or bunding required.	80%	Provision for spur road and landscaping.
Land allocated for business park with high landscape quality.	75%	Provision for spur road extensive landscaping, balancing ponds etc.
Land allocated for employment use where a single end user could be in the market.	100%	All land to be taken by single user, surplus areas to be kept for its expansion.

Appendix 6 Summary Site Scoring / Recommendations

Wyre Employment Land and Commercial Leisure Study

SITE REF	SITE	ESTATE	Current Planning Policy Status	Spatial Character Area	Gross Site Area (ha)	Adjustment Factor	Net Site Area	QUALITATIVE ASSESSMENT CRITERIA												Total	RECOMMENDATIONS
								Greenfield / Brownfield	% employment on mixed use site	Net Employment land area	Local Road Access	Proximity to Urban Areas	Compatibility of Adjoining Uses	Physical Characteristics	Market Attractiveness	Planning / Sustainability	Infrastructure	Other Barriers to Development			
CURRENTLY AVAILABLE																					
WY 04 01	Proposed Wyre Power	Hillhouse Secure Site	Strategic Location For Development	Thornton	12.31	1.00	12.31	BF	100%	12.31	4	1	4	3	3	5	3	2	25	Energy Generation	
WY 04 02	Proposed Anaerobic Digester	Hillhouse Secure Site	Strategic Location For Development	Thornton	1.19	1.00	1.19	BF	100%	1.19	4	1	4	2	3	5	3	2	24	Energy Generation	
WY 04 03	East Road	Hillhouse Secure Site	Strategic Location For Development	Thornton	2.23	1.00	2.23	BF	100%	2.23	4	1	4	1	3	5	3	2	23	Allocate for employment use	
WY 04 04	South Road fronting Vinollit	Hillhouse Secure Site	Strategic Location For Development	Thornton	0.94	1.00	0.94	BF	100%	0.94	4	1	4	2	3	5	3	2	24	Allocate for employment use	
WY 04 05	South Road adjoining new substation	Hillhouse Secure Site	Strategic Location For Development	Thornton	0.67	1.00	0.67	BF	100%	0.67	4	1	4	1	3	5	3	2	23	Allocate for employment use	
WY 04 06	Riverside Business Park	Hillhouse Secure Site	Strategic Location For Development	Thornton	13.26	0.85	11.27	BF	100%	11.27	4	1	4	3	3	5	3	2	25	Allocate for employment use	
WY 04 07	South Road / Central Road	Hillhouse Secure Site	Strategic Location For Development	Thornton	1.01	1.00	1.01	BF	100%	1.01	4	1	4	2	3	5	3	2	24	Allocate for employment use	
WY 04 08	Lagoons & land at North of Site	Hillhouse Secure Site	Strategic Location For Development	Thornton	15.92	0.85	13.53	BF	100%	13.53	4	1	4	1	3	5	3	1	22	Deallocate	
WY 06 01	Venture Road	Burn Hall Industrial Estate	Strategic Location For Development	Thornton	1.79	0.90	1.61	BF	100%	1.61	5	2	4	3	1	5	4	3	27	Employment	
WY 06 02	Enterprise Way	Burn Hall Industrial Estate	Strategic Location For Development	Thornton	0.14	1.00	0.14	BF	100%	0.14	5	2	5	3	1	5	4	4	29	Employment	
WY 06 03	South East corner	Burn Hall Industrial Estate	Strategic Location For Development	Thornton	0.79	0.90	0.71	BF	100%	0.71	5	2	5	3	1	5	4	2	27	Employment	
WY 06 04	North of Estate Road	East of Fleetwood Road	New Employment Allocation	Thornton	1.70	0.90	1.53	BF	100%	1.53	5	2	5	4	2	5	5	4	32	Employment	
WY 06 05	South of Estate Road	East of Fleetwood Road	New Employment Allocation	Thornton	4.52	0.90	4.07	BF	100%	4.07	5	2	5	5	2	5	5	2	31	Employment	
WY 07 01	Butts Road	Red Marsh Industrial Estate	Existing Employment Commitment	Thornton	0.21	1.00	0.21	BF	100%	0.21	1	2	4	4	2	5	4	5	27	Employment	
WY 07 02	Hargreaves Street	Red Marsh Industrial Estate	Existing Employment Commitment	Thornton	0.69	0.90	0.62	GF	100%	0.62	2	4	1	3	2	5	4	4	25	Deallocate	
WY 07 03	Thornton Primary School	Red Marsh Industrial Estate	Existing Employment Commitment	Thornton	1.98	1.00	1.98	BF	100%	1.98	2	4	1	3	2	5	4	1	22	Deallocate	
WY 07 04	Special Needs Schools	Red Marsh Industrial Estate	Existing Employment Commitment	Thornton	2.47	1.00	2.47	BF	100%	2.47	2	4	1	3	2	5	4	1	22	Deallocate	
WY 07 05	Allotments	Red Marsh Industrial Estate	Existing Employment Commitment	Thornton	0.39	1.00	0.39	GF	100%	0.39	2	4	1	4	2	5	2	1	21	Deallocate	
WY 08 01	North end of Siding Road	Copse Road Industrial Area	Vacant land within existing employment area	Fleetwood	0.30	1.00	0.30	BF	66.7%	0.20	5	5	4	3	2	4	2	2	27	Mixed-use with employment	
WY 08 02	South of Copse Depot	Copse Road Industrial Area	Vacant land within existing employment area	Fleetwood	2.35	0.85	2.00	BF	100%	2.00	4	5	4	3	2	4	1	1	24	Employment	
WY 08 03	East of Copse Road Builders Yard	Copse Road Industrial Area	Vacant land within existing employment area	Fleetwood	0.36	0.90	0.32	BF	100%	0.32	4	5	4	3	2	3	2	1	24	Employment	
WY 08 04	Depot, Copse Road	Copse Road Industrial Area	Vacant land within existing employment area	Fleetwood	0.23	1.00	0.23	BF	100%	0.23	5	4	5	3	2	3	4	4	30	Employment	
WY 08 05	West of Copse Road	Copse Road Industrial Area	Existing Employment Commitment	Fleetwood	0.89	0.80	0.71	BF	100%	0.71	5	4	4	2	2	5	4	4	30	Employment	
WY 08 06	Off Denham Way	Copse Road Industrial Area	Existing Employment Commitment	Fleetwood	0.25	1.00	0.25	BF	100%	0.25	5	5	5	2	3	5	2	3	30	Employment	
WY 10 01	East of Dock Street	Port of Fleetwood	Vacant land within existing employment area	Fleetwood	7.06	0.85	6.00	BF	100%	6.00	4	5	4	4	3	4	4	5	33	Port Related Use	
WY 10 02	West of Dock Avenue (m-u)	Port of Fleetwood	Allocated for mixed use	Fleetwood	0.90	0.00	0.00	BF	100%	0.00	5	2	5	3	2	4	5	5	31	Mixed-use without employment	
WY 10 03	West of Dock Avenue (Fylde Ice)	Port of Fleetwood	Allocated for employment use	Fleetwood	1.39	0.90	1.25	BF	100%	1.25	5	2	5	4	3	5	4	4	32	Employment - Expansion Land	
WY 10 04	East of Herring Arm Road (Haylite)	Port of Fleetwood	Allocated for mixed use	Fleetwood	1.06	0.00	0.00	BF	100%	0.00	4	2	2	2	2	4	2	3	21	Mixed-use without employment	
WY 10 05	West end of Herring Arm Road (m-u)	Port of Fleetwood	Allocated for mixed use	Fleetwood	0.77	0.00	0.00	BF	100%	0.00	5	2	3	3	1	4	5	4	27	Mixed-use without employment	
WY 10 06	South of new road	Port of Fleetwood	Partially unallocated, partially an existing employment commitment	Fleetwood	9.13	0.85	7.76	BF	66.7%	5.17	5	2	5	4	1	5	2	1	25	Mixed-use with employment	
WY 11 01	West of Premier Way	Poulton Industrial Estate	Vacant land within existing employment area	Poulton-le-Fylde	0.20	1.00	0.20	BF	100%	0.20	5	5	5	4	4	2	5	5	35	Do not allocate	
WY 11 02	West of Aldon Road	Poulton Industrial Estate	Existing Employment Commitment	Poulton-le-Fylde	0.61	0.90	0.55	BF	100%	0.55	3	4	5	4	3	5	2	4	30	Employment	
WY 11 03	East of Aldon Road	Poulton Industrial Estate	Existing Employment Commitment	Poulton-le-Fylde	0.37	1.00	0.37	BF	100%	0.37	3	4	5	4	3	5	2	4	30	Employment	
WY 11 04	North of Furness Drive	Poulton Industrial Estate	Existing Employment Commitment	Poulton-le-Fylde	0.25	1.00	0.25	BF	100%	0.25	4	5	3	3	4	5	3	3	30	Employment	
WY 12 01	North west corner	Robson Way	Vacant land within existing employment area	Poulton-le-Fylde	1.06	0.90	0.95	BF	100%	0.95	2	3	5	4	1	5	2	2	24	Employment	
WY 13 01	Allocated Site, Station Road, Poulton	Station Road, Poulton	Existing Employment Commitment	Poulton-le-Fylde	0.34	1.00	0.34	BF	100%	0.34	1	5	2	4	1	3	1	1	18	Deallocate	
WY 13 02	Windfall Site, Station Road, Poulton	Station Road, Poulton	Vacant land within existing employment area	Poulton-le-Fylde	0.91	1.00	0.91	BF	100%	0.91	1	5	2	3	1	2	4	2	20	Do not allocate	
WY 19 01	North of entrance	Nateby Technology Park	Vacant land within existing employment area	Central Rural Plain	0.17	1.00	0.17	GF	100%	0.17	2	1	5	3	1	4	2	4	22	Employment	
WY 20 01	South of Estate	Taylor's Lane Ind Est, Pilling	Existing Employment Commitment	Central Rural Plain	0.69	0.90	0.62	GF	100%	0.62	3	2	4	3	1	5	2	2	22	Deallocate	
WY 24 01	Brockholes Way	Brockholes Way, Catterall	Existing Employment Commitment	Garstang	0.20	1.00	0.20	BF	100%	0.20	1	3	5	4	3	5	4	4	29	Employment	
WY 00 04	Longmoor Lane	Nateby	Existing Employment Commitment	Garstang	1.37	1.00	1.37	GF	100%	1.37	3	4	5	2	3	4	1	2	24	Employment - Expansion Land	
WY 00 05	Catterall Gates Lane North	Catterall Gates Lane North	Existing Employment Commitment	Garstang	3.21	0.85	2.73	GF	100%	2.73	1	2	2	4	3	5	1	2	20	Deallocate	
WY 00 06	Catterall Gates Lane South East	Catterall Gates Lane South	Part Allocated	Garstang	3.27	0.85	2.78	GF	100%	2.78	2	3	2	4	3	3	1	2	20	Deallocate	
WY 00 06a	Catterall Gates Lane South West	Catterall Gates Lane South	Part Allocated	Garstang	3.60	0.85	3.06	GF	100%	3.06	3	4	2	4	3	3	1	2	22	Employment - Expansion Land	
BECOMING AVAILABLE SUMMER 2013					103.15		90.21			87.53											
WY 03 01	Block 1 & Robinson House	Norcross	Existing Employment site, to become vacant	Cleveleys	1.93	0.95	1.83	BF	50.0%	0.92	4	3	5	4	2	3	4	2	27	Mixed-use with employment	
WY 03 02	Block 2 & parking	Norcross	Existing Employment site, to become vacant	Cleveleys	1.93	0.95	1.83	BF	50.0%	0.92	4	3	5	4	2	3	4	2	27	Mixed-use with employment	
WY 03 03	Block 3	Norcross	Existing Employment site, to become vacant	Cleveleys	1.60	0.95	1.52	BF	50.0%	0.76	4	3	5	4	2	3	4	2	27	Mixed-use with employment	
WY 03 04	Blocks 4 & 7	Norcross	Existing Employment site, to become vacant	Cleveleys	1.87	0.95	1.78	BF	50.0%	0.89	4	3	4	2	2	3	4	2	24	Mixed-use with employment	
WY 03 05	Block 5 & Canteen	Norcross	Existing Employment site, to become vacant	Cleveleys	2.27	0.95	2.16	BF	50.0%	1.08	4	3	5	4	2	3	4	2	27	Mixed-use with employment	
WY 03 06	Block 6	Norcross	Existing Employment site, to become vacant	Cleveleys	0.90	0.95	0.86	BF	100%	0.86	4	3	4	2	2	3	4	2	24	Mixed-use without employment	
POTENTIAL ALLOCATIONS					10.50		9.98			5.42											
WY 00 01	Hallgate Lane	Preesall	Unallocated	Rural West	4.07	0.85	3.46	GF	100%	3.46	3	2	2	4	2	3	2	2	20	Do not allocate	
WY 00 02	Carr Lane	Pilling	Unallocated	Central Rural Plain	2.13	0.85	1.81	GF	100%	1.81	3	2	2	3	1	4	2	2	19	Do not allocate	
WY 00 03	Land West of A6	Garstang	Unallocated	Garstang	16.00	0.85	13.60	GF	50.0%	6.80	5	5	5	5	4	3	1	2	30	Mixed-use with employment	
WY 00 06b	Catterall Gates Lane South Extn	Catterall	Unallocated	Garstang	4.33	0.85	3.68	GF	50.0%	1.84	4	4	2	5	3	3	1	2	24	Mixed-use with employment	
WY 00 07	Beech House Fields (pt), Garstang Rd	Catterall	Unallocated	Garstang	2.04	0.85	1.73	GF	100%	1.73	4	4	2	4	3	3	1	1	22	Do not allocate	
WY 00 08	Brockholes Extension	Catterall	Unallocated	Garstang	11.01	0.64	7.00	GF	100%	7.00	4	1	5	3	4	3	1	1	22	Employment - Expansion Land	
WY 00 09	Garstang Road	Bilsborrow	Unallocated	Central Rural Plain	2.16	0.85	1.84	GF	100%	1.84	2	3	2	3	3	3	1	2	19	Do not allocate	
					41.74		33.12			24.48											

Appendix 7 Appraisal of an Indicative Industrial Scheme

FINANCIAL VIABILITY APPRAISAL OF A NOTIONAL 5.5 HECTARE INDUSTRIAL SCHEME IN A6 CORRIDOR

Summary Appraisal for Merged Phases

REVENUE

Rental Area Summary

	Units	m ²	Rate m ²	Initial MRV
Phase 1	1	4,750.00	£60.00	£285,000
Phase 2	1	4,750.00	£60.00	£285,000
Phase 3	1	4,750.00	£60.00	£285,000
Phase 4	1	4,750.00	£60.00	£285,000
Totals	4	19,000.00		£1,140,000

Investment Valuation

Phase 1

Market Rent	285,000	YR @	9.0000%	11.1111	
(0yrs 3mths Rent Free)		PV 0yrs 3mths @	9.0000%	0.9787	3,099,172

Phase 2

Market Rent	285,000	YR @	9.0000%	11.1111	
(0yrs 3mths Rent Free)		PV 0yrs 3mths @	9.0000%	0.9787	3,099,172

Phase 3

Market Rent	285,000	YR @	9.0000%	11.1111	
(0yrs 3mths Rent Free)		PV 0yrs 3mths @	9.0000%	0.9787	3,099,172

Phase 4

Market Rent	285,000	YR @	9.0000%	11.1111	
(0yrs 3mths Rent Free)		PV 0yrs 3mths @	9.0000%	0.9787	3,099,172

GROSS DEVELOPMENT VALUE

Purchaser's Costs	5.63%	(697,314)	12,396,689	12,396,689
NET DEVELOPMENT VALUE			11,699,376	

NET REALISATION

11,699,376

OUTLAY

ACQUISITION COSTS

Fixed Price (5.50 Ha @ £27,272.73 pHect)			150,000	
Stamp Duty	1.00%		1,500	
Agent Fee	1.00%		1,500	
Legal Fee	1.00%		1,500	
Town Planning			65,000	
Survey			5,000	
				224,500

CONSTRUCTION COSTS

Construction	m ²	Rate m ²	Cost	
Phase 1	4,750.00	£480.00	2,280,000	
Phase 2	4,750.00	£480.00	2,280,000	
Phase 3	4,750.00	£480.00	2,280,000	
Phase 4	4,750.00	£480.00	2,280,000	
Totals	19,000.00		9,120,000	
Contingency		3.00%	273,600	
Road/Site Works			800,000	
				10,193,600

PROFESSIONAL FEES

Total Professional Fees	10.00%	992,000		992,000
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MARKETING & LETTING

Marketing			28,000	
Letting Agent Fee	10.00%		114,000	

Letting Legal Fee	5.00%	57,000	199,000
DISPOSAL FEES			
Sales Agent Fee	1.00%	116,994	
Sales Legal Fee	0.50%	58,497	175,491
Additional Costs			
Arrangement Fee		10,000	10,000
FINANCE			
Debit Rate 7.000% Credit Rate 0.000% (Nominal)			
Total Finance Cost			1,659,870
TOTAL COSTS			13,454,461
PROFIT / LOSS			(1,755,085)
FUNDING REQUIREMENT TO ACHIEVE 20% PROFIT ON COST			4,445,977
Performance Measures			
Profit on Cost%	(13.04)%		
Profit on GDV%	(14.16)%		



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